Central Lincolnshire City and Town Centre Study

Final Report

May 2012

Address: Quay West at MediaCityUK, Trafford Wharf Road, Trafford Park, Manchester, M17 1HH
Tel: 0161 872 3223
E-Mail: planners.manchester@wyg.com
Web: www.wyg.com

Document Control

Project:	Central Lincolnshire City and Town Centre Study
Client:	Central Lincolnshire Joint Planning Committee
Job Number:	A071272
File Origin:	T:\Administration WYGP\Archive\To be Archived\A071272 - Central Lincolnshire City and Town Centre Study\Reports\Final\Central Lincs Retail Study_Final Report_April.doc

Document Checking:

Prepared by:	Richard Shepherd	Signed:	
Checked by:	Keith Nutter	Signed:	
Verified by:	Keith Nutter	Signed:	

Issue	Date	Status
1	15-11-2011	Draft Final Report
2	04-04-2012	Revised Final Report
3	31-05-2012	Revised Final Report

Contents Page

Table and Figure Contents

Appendix Contents

1.0 Introduction

Objectives of Study

1.01 WYG Planning & Design (WYG) was commissioned by the Central Lincolnshire Joint Planning Committee in June 2011 to undertake the Central Lincolnshire City and Town Centres Studies Update (hereafter referred to as 'the Study'). The objectives of the Study are established by the Tender Brief, dated 13 May 2011, with the key focus being the provision of an up-to-date assessment of the future capacity for retail development in the three local authority areas and, in particular, the main centres of Lincoln, Gainsborough, Market Rasen and Sleaford. The provision of an up-to-date Study is of particular importance given the downturn in the UK economy since the reporting of the previous Retail Studies in 2007 and 2008, which has had a notable impact on the retail sector. Accordingly, the findings of this Study act to supersede those previously reported in the City of Lincoln Retail and Town Centre Study (2007), the North Kesteven District Retail and Commercial Leisure Study (2007) and the West Lindsey Retail and Commercial Leisure Study (2008).

1.02 The Tender Brief establishes a number of requirements for the Study which are identified in two separate stages. Stage 1 includes a quantitative need assessment for Central Lincolnshire in order to update the principal findings and recommendations set out in the authorities' previous retail studies. Stage 2 provides recommendations on the ability of the main centres to accommodate the type and scale of need identified. This report provides our findings in respect of both of the stages.

1.03 In order to appropriately meet the needs of the Tender Brief, new empirical research has been undertaken, including a telephone survey of 1,500 households across the three local authority areas and beyond in order to ascertain existing retail expenditure patterns. The survey data is utilised to provide an estimate of the expenditure which is claimed by existing retail facilities in the Study Area and to identify what future needs will be, based on population change and expenditure growth projections. The Study also draws upon a comprehensive WYG survey of existing operators in 27 destinations[1] across the three local authority areas and involves the examination of existing published data sources relating to the four main centres, including Experian Goad, FOCUS and Valuation Office Agency data.

[1] Comprising the four main centres of Gainsborough, Lincoln, Market Rasen and Sleaford, together with an additional 23 proposed or previously identified 'key service centres', which perform a more local role. The term 'key service centre' is used to collectively refer to these centres and their broad function throughout the remainder of the report but should not be taken to be representative of any current planning policy designation

1.04 During the undertaking of the Study, key national retail planning guidance in the form of Planning Policy Statement 4: Planning for Sustainable Economic Development was replaced by the National Planning Policy Framework (NPPF). The NPPF retains modified versions of the key impact and sequential retail tests, and maintains a requirement for local authorities to make appropriate provision to meet needs for retail, leisure, office and other main town centre uses in full. It is also relevant to note that the Planning for Town Centres: Practice Guidance on Need, Impact and the Sequential Approach (PPS4) (DCLG, 2009), which provides direction on the production of the evidence base to plan positively for town centre use, has remained in place throughout the course of the Study. The Practice Guidance continues to highlight the need to take account of both the quantitative and qualitative need for retail and leisure developments.

Format of Report

1.05 This report considers the existing performance and need for additional retail development in each of the four main centres, before considering the future opportunities to accommodate growth and our recommendations in terms of town centre planning policy. Our report is therefore structured as follows:

- Section 2 summarises current and emerging national retail trends and shopping patterns;
- Section 3 provides our review of the national, regional and local retail planning policy of relevance to the Study;
- Section 4 provides a summary of recent Gainsborough, Lincoln and Sleaford Masterplan commissions;
- Section 5 summarises our assessment of the current vitality and viability of the four main centres and 23 further key service centres across the three authority areas;
- Section 6 considers the results of the household survey and sets out the key findings with regard to retail expenditure patterns across the Study Area;
- Section 7 considers current and future population and expenditure levels within the Study Area;
- Section 8 sets out our assessment of quantitative need for further convenience and comparison goods floorspace in the periods to 2016, 2021, 2026 and 2031, taking into account claims on expenditure growth;
- Section 9 considers the site specific and broad opportunities which exist to accommodate future development in each of the four main centres; and
- Section 10 summarises our overall conclusions and policy recommendations.

2.0 Current and Emerging Retail Trends

Introduction

2.01 The retail property landscape across the UK has evolved significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of retail warehouse parks and out-of-town regional shopping malls.

2.02 During this time, the retail and leisure sectors have both experienced considerable expenditure growth. Although this growth has been limited in very recent years, for most of the past decade or more, spending on retail goods has increased significantly, particularly spending on comparison (or non-food) goods. This expenditure growth has been attributable to a number of factors, including greater disposable income, cheaper prices and new technology.

2.03 The retail market is continually changing as a result of shifts in demographics, evolving planning policy and due to technological advancements, such as e-tailing. These changes have had a subsequent impact on the format of retail and leisure floorspace, with signs that retail development has increasingly been directed towards town centres in recent years. This trend exemplifies the 'town centre first' policy approach which has been pursued by recent Governments and is now outlined in the National Planning Policy Framework (2012).

Current Retail Picture

2.04 Research undertaken by Colliers CRE[2] provides information on recent trends together with forecasts for the future of retailing in the UK. The research confirms that the retail sector has been significantly affected by the economic climate and uncertainty remains about the strength and durability of future growth. It is noted that whilst sales volumes and footfall were high at the start of 2011, more recently, the retail market has taken a turn for the worse. The significant reduction in Government spending due to austerity measures, along with the increasing unemployment figures, do not bode well for continued positive gross domestic product growth.

2.05 These factors have had a significant impact on the public's confidence and their propensity to spend their earnings on retail goods. Furthermore, recent and proposed increases in taxation (e.g. rises in VAT, national insurance contributions and capital gains tax) also suggest that growth in household spending is not likely to counterbalance any public sector retrenchment in the short term. In addition,

[2] 'Great Britain Retail: Autumn 2011', Colliers CRE, 2011

it is noted by Colliers CRE that inflation has risen to such a level that it is currently outpacing average earnings growth by approximately 2.5%.

2.06 Colliers CRE also reports[3] that economic conditions are resulting in significant structural changes to the High Street, whereby many retailers are showing signs of caution by reducing the size of their property portfolios, abandoning weaker towns and concentrating on acquiring sites in city centres and major regional shopping centres. Comparison goods retailers are finding it increasingly difficult to justify being represented in every town in the UK. Large cities and towns which offer an 'experience' and choice for customers and high volume trading potential for the retailers continue to be attractive. Colliers CRE indicates that this situation is unlikely to change as the major comparison goods retailers look for the most cost effective ways to sell product and focus on the larger markets and online retailing, with 'mid-market' town centre retailing being squeezed as a result.

2.07 As a consequence of the above, demand has reduced considerably for 'poorer stock' in secondary locations and in many smaller towns with a commensurate drop in value (and often rent). Voids have increased, resulting in a lack of investment in the upkeep of premises and a harmful impact on the overall attractiveness of centres. However, due to the fragility of the economy as a whole and the difficulties in securing investment, the development pipeline has been turned off and there are now opportunities for rental inflation for well-configured shops in major towns and cities which meet the needs of modern retailers. In short, there has been a marked polarisation, characterised by diminishing demand for secondary premises in smaller locations and the ever greater attractiveness of well located and appropriately configured floorspace in centres of sub-regional and regional importance.

2.08 Given current spending patterns and the wider economic climate, it is unsurprising that Experian, which monitors and forecasts retail consumer expenditure in the UK, has reviewed its forecast growth rates for both convenience and comparison goods expenditure in recent years. Experian's forecast annual per capita convenience goods growth rate[4] is now -0.3% in 2011, +0.4% in 2012 and +0.5% in 2013, following negative growth in two of the three previous years. Similarly, over the short term at least, Experian's forecast annual per capita comparison goods growth rates[5] are also considerably more circumspect than in previous years, with forecast growth of +0.5% in 2011, +1.6% in 2012 and +2.1% in 2013, after very minimal growth in 2010 and negative growth in 2009. By way of

[3] 'Midsummer Retail Report', Colliers CRE, 2011
[4] Annual average per capita expenditure goods growth rates sourced from 'Retail Planner Briefing Note 9', Experian, September 2011
[5] Ibid

comparison, in 2007 Experian's average annual growth forecast between 2007 and 2016 for convenience goods was 0.8% and for comparison goods it was 3.5%[6].

2.09 In line with Experian's expectations, it has been widely reported that a number of high street retailers suffered poor trading figures during 2009 and 2010, resulting in many operators selling heavily reduced goods. Indeed, despite heavy discounting over the 2008 festive period and the reduction in VAT from 17.5% to 15.0% until January 2010, a significant number of 'big name' retailers fell into administration in 2008 and 2009, including Adams, MFI, The Pier, Woolworths and Zavvi. Whilst retail administrations fell considerably in 2010[7], further companies affected last year include Envy, Ethel Austin, Faith Shoes, Habitat, Thorntons and Suits You. The Insolvency Service has reported that retailer failures increased 55% from 80 in Q4 2010 to 124 in Q1 2011 and that the number of retail company voluntary arrangements (CVAs)[8] increased from 23 to 30 over the same period.

2.10 Despite the difficulties set out above and the general decline in the comparison goods sector, specific types of goods continue to perform well. The market for recreational goods (including DVDs, CDs, toys, computers and books) has, as a whole, performed well in recent years, with healthy growth attributed to supermarket sales together with the growing popularity of online shopping, which continues to see an increase in sales year-on-year. However, the increasing popularity of the internet to purchase, in particular, books and music has had a notable impact on the composition of town centres, with such stores (with the exception of HMV/Waterstones) all but disappearing from the high street.

2.11 As an apparent direct consequence of wider economic conditions, Colliers CRE and Verdict[9] research indicates that discount convenience retailers (including Lidl, Aldi and Netto) performed strongly during 2008 and 2009 and sought to acquire additional sites which conform to their trading model, i.e. edge-of-centre site which will provide for a single storey building in the order of 1,000 sq.m and around 100 car parking spaces. However, growth in this sector begun to slow in 2010 due to lower consumer sensitivity to price as the economy started to recover and due to a vigorous response from the 'big four' convenience goods retailers (Asda, Morrisons, Sainsbury's and Tesco) in the form of lower price promotions and additional value lines. The influence of the sector has also been affected by Asda's

---

[6] Annual average per capita expenditure goods growth rates sourced from 'Retail Planner Briefing Note 5.1', Experian, November 2007
[7] Reported by the 'Who's Gone Bust in Retailing 2010-11?' Retail Briefing, Centre for Retail Research, March 2011
[8] A CVA is a procedure which allows a company which is insolvent or which has debt problems to reach a voluntary agreement with its business creditors regarding repayment of all or part of its corporate debts over a period of time
[9] 'UK Food & Grocery Retailers', Verdict, September 2010

acquisition of Netto, which will result in the rebranding of around 150 such stores from the summer of 2011.

2.12 At the other end of the market, Marks & Spencer Simply Food has not performed as strongly as it has done previously, with additional food store openings acting to cannibalise food sales in its main store food halls. As a result, it was announced it January 2009[10] that 25 Simply Food stores were to close in the UK, following a two or three year period of rapid expansion.

Trends in Comparison Goods Shopping

2.13 Whilst it is anticipated that growth in retail spending over the next ten years will not mirror that of the last decade, there will continue to be some growth in comparison goods expenditure. Consequently, there is increasing impetus from retailers to achieve more efficient use of floorspace, particularly given the recent poor performance of many national multiples, many of which have been affected by the significant increase in e-tailing. As a consequence of their recent performance, retailers are more reluctant to commit to new development than they have been in previous decades. Instead, they are more selective and are holding out for accommodation that is appropriate both in terms of location and the type of premises provided. Indeed, retailers are seeking to occupy larger units in order to achieve more efficient use of floorspace and attract shoppers from a wider area. These larger floorplates enable retailers to provide a greater range of goods.

2.14 Whilst there is likely to be continued demand for larger, modern retail units in the future, increased sensitivity over future viability will mean a cautious approach to new investment for many key national retailers. Marginal locations within centres will increasingly be rejected. Many national retailers, who would have previously considered smaller/lower order centres in order to increase their market share, are now assessing the performance and their future strategies given the ongoing downturn in the economy. Consequently, many investment decisions will be influenced by the scale of commitment from other retailers; developers will increasingly need to promote large town centre redevelopment schemes if they are to attract high quality retailers.

Trends in Food Retailing

2.15 In the aftermath of the growth in the number of edge and out-of-centre large format supermarkets during the 1990s, development of such facilities is now more limited due to stricter planning laws (following the publication of PPS6 and subsequently PPS4) and a lack of suitable sites. As a result, the

[10] Reported by The Guardian, 7 January 2009

national multiples in the food retailing sector are finding a range of other measures to improve their market share. These include:

- Offering a wider product range, such as financial and insurance products, petrol and non-food goods;
- Developing a wide range of retail models, for example small-format convenience stores in town centres (e.g. Sainsbury's Local, Tesco Express), smaller supermarkets mostly in town centres (e.g. Tesco Metro), superstores (e.g. Tesco) and hypermarkets (e.g. Tesco Extra, Asda Supercentres);
- Extended opening hours;
- Offering cheap products and no-frills service;
- Providing an attractive and powerful brand image; and
- Offering a home delivery service.

2.16 Verdict[11] estimates that the food and grocery sector will be worth £130.0 billion in 2011, equating to annual growth of 3.2%, representing 43.7% of total retail spend. The dynamics of the market have changed rapidly, with inflation the primary driver of any growth which remains. Supply-driven inflation has continued to impact on raw materials and logistics costs, whilst consumers continue to remain highly price sensitive. As a result, grocers have taken much of the impact of this inflation and continue to offer significant promotions and multibuy offers. Even so, volume growth has slowed substantially, with Verdict forecasting it to be just 1.1% in 2011.

2.17 Verdict has also reported[12] that the food and grocery sector is being impacted by changing UK demographics. For example, there has been a rise in single occupancy young professional households who are 'time poor' and relatively 'cash rich'. Though their baskets might be small, they tend to buy higher value items therefore providing an opportunity to boost volume and value growth. Elsewhere, an ageing population profile is leading to a rise in time rich consumers who are likely to do weekly shops rather than make frequent small trips. The contrasting requirements of these markets means that retailers are seeking both to add additional small stores to their portfolio and to open (and expand existing) larger stores. Accordingly, format flexibility will be essential to operators' success.

2.18 Between 2005 and 2010, grocery retailers' total space increased by 10.6%, delivering an additional net 11.8 million sq.ft of new floorspace. The 'Big Four' supermarket operators (Asda, Morrisons, Tesco and Sainsbury's) in particular continue to seek out opportunities to provide additional

---

[11] 'UK Food & Grocery Retailers 2011', Verdict, September 2011
[12] 'UK Food & Grocery Retailers 2010', Verdict, September 2010

floorspace, though Verdict[13] suggests that gaining market share from the opening of new stores will become increasingly difficult for the leading grocers due to growing cannibalisation of sales from existing stores. However, Verdict still estimates that between 2010 and 2015, grocers will increase their space by 22 million sq.ft, almost twice the quantum of floorspace opened in the five years prior to 2010, even though retail growth will be much slower over the next five years.

2.19 Following a period of strong performance in 2008 and 2009, as a result of greater consumer price sensitivity and awareness of discounters' offers, the discount sub-sector is now showing signs of slowing to its previous, much lower, rate of growth. In the UK, the hard discount sector has comprised three operators, these being Aldi, Lidl and Netto. However, following the aforementioned purchase of the third largest operator, Netto, by Asda in May 2010, the sector will now shrink significantly. Furthermore, lower consumer price sensitivity as the economy gradually recovers and a vigorous response from the 'Big Four' operators (through lower price promotions and value lines) has halted the defection of customers to the discount sector.

Out-of-Centre

2.20 The research undertaken by Colliers CRE[14] notes that demand for out-of-centre representation is limited, with recent poor trading figures and the failure of Focus DIY meaning that those retailers seeking to acquire stores have a pick of vacant stock. Some of the voids created by these administrations remain unlet and the flooding of the market with so much unwanted space has acted to reduce rents. Retailers who have had their pick of the best stores in recent years include Dunelm, Pets at Home, Dreams, Matalan, Dixons Group, Go Outdoors, Smyths Toys, B&M, Mothercare, Next Home and TK Maxx.

2.21 Looking forward, Colliers CRE indicates the majority of out-of-town retail warehouse supply is being added to by the availability of existing stock which is being vacated, rather than through new development. Demand is reported as being 'patchy' and centred solely on prime bulky and open A1 schemes with good catchments and restricted supply. As a consequence, for most schemes to be viable, an element of food retailing or open A1 non-food retailing is likely to be required.

---

[13] 'UK Food & Grocery Retailers 2011', Verdict, September 2011
[14] 'Midsummer Retail Report', Colliers CRE, 2011

Shopping Centre Development

2.22 Colliers CRE[15] states that town centre retail development is at a virtual standstill and that little activity is anticipated over the next few years – indeed, it reports that the next two years will see the lowest level of shopping centre completions in 50 years. A viable development is considered almost impossible to achieve no matter how well designed or well located a scheme is.

2.23 All but the very strongest of proposed schemes will require a strong and growing UK economy to ensure good retail demand, strong rental levels, reasonable incentive levels and the availability of good finance further improvement into the investment market and, critically, the availability of finance. With the well documented public sector job cuts and cost saving measures, these attributes are unlikely to come together in most medium sized and smaller towns for some time. Indeed, Colliers CRE suggests that it may only be foodstore-anchored development which will be viable in such centres in the short-term, not only because a food retail pre-let can support the overall viability of a scheme, but also because such an anchor will attract significant footfall thus driving demand across the remaining space.

Growth in E-tailing ('E-commerce')

2.24 Many consumers who previously shopped in town centres and at retail parks are now using the internet for some of their purchases. This trend is set to continue, although the exact impact that e-commerce will have on the high street has yet to be fully established. However, the rise in the UK in recent years of e-commerce has impacted upon retailers, developers and investors alike. As access to the internet/online shopping continues to grow through digital televisions and mobile phones, proportionally less money is anticipated to be spent in the high street or at retail parks.

2.25 The growth in use of the internet as a sales medium has been enabled by increasing access to the internet by households, with an increase in household access increasing from 61% in 2007 to 77% in 2011[16]. The proportion of households with access to the internet is expected to increase further over the coming years, alongside the growth in mobile phone and tablets internet access. This has supported the strong growth recorded, together with improved consumer confidence in the security of online payment, and heavy demand for expensive electrical products available online. The option of using the internet to 'click and collect' in-store is also increasing in popularity, with the service accounting for 20% of John Lewis internet orders.

[15] Ibid
[16] 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2011

2.26 Office for National Statistics (ONS) data[17] indicates that the number of people using the internet to purchase goods continues to rise, with 66% of the UK population now having purchased products over the internet, compared to 53% at 2007. The most popular online purchases were clothes/sports goods, with 46% of internet users having purchased such items online. Additionally, 21% of users have purchased food or groceries and 38% have purchased household goods online.

2.27 Additional research conducted by the Interactive Media in Retail Group (IMRG) and analysts Capgemini[18] indicates that internet shopping equates to some £58.8 billion of expenditure, with British shoppers spending £5.2 billion online in August 2011, a year-on-year growth of 14%.

2.28 The Top 10 e-retailers include Amazon UK, Argos, and Next. With regard to supermarket operators, major retailers with a significant online presence have seen their internet business grow as online shopping penetration has increased, and as the likes of Asda and Sainsbury's have improved their geographical coverage and capacity. The growth in online convenience shopping is corroborated by Experian's assessment[19] that 7.4% of convenience goods purchases were undertaken via the internet or by other non-store special forms of trading in 2010 (albeit a proportion of this would actually be sourced and supplied from the shelves of a local supermarket).

2.29 It is therefore evident that internet shopping as a whole is having an impact upon traditional high streets, in light of increased competition and lower prices, and due to its convenience. Consequently, there is a possibility that online retailing will put some pressure on retail rental growth over the next five to ten years, but is unlikely to impact on capital values. Research by BCSC[20] identifies that 'large' and 'very large' shopping centres (of over 40,000 sq.m) are deemed almost immune from the impact of online shopping as they offer the complete 'day out'. However, as the size of the shopping centres decreases, it is more likely that there will be greater adverse effects. Within small shopping centres (sized between 5,000 sq.m and 20,000 sq.m), including those in market towns, it is likely that the growth of online shopping could reduce turnover, notwithstanding any growth in disposable income.

2.30 Although there is a varied range of assumptions in terms of the future effect of online shopping, it is considered that e-tailing will not replace the shopping experience as shopping is a social activity. The BCSC research suggests that online shopping be considered a complementary tool to support retail sales from physical destinations. For successful retailers, online selling provides an additional route to

[17] Ibid
[18] IMRG Capgemini e-retail Sales Index, August 2011
[19] Retail Planner Briefing Note 9, September 2010
[20] 'Future of Retail Property – Online Retailing: The Impact of Click on Brick', British Council of Shopping Centres, 2006

the market, benefitting from demand and brand awareness generated through physical channels. Clearly, those retailers who are likely to have a healthy future are those which combine a strong high street presence with an interesting and closely related e-tail offer.

3.0 Planning Policy Context

Introduction

3.01 Given that this study seeks to provide evidence to assist in the production of the Local Development Framework (LDF), it is important to review key policy advice and explore how current and emerging national planning policy may impact upon the delivery of local policy.

National Planning Policy Framework

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

3.03 The main theme of the Framework is that there should be 'a presumption in favour of sustainable development'. In terms of plan-making it is stated that local planning authorities should positively seek opportunities to meet the development needs of their area, with an emphasis on Local Plans having sufficient flexibility to adapt to rapid change.

3.04 In terms of economic development, it is set out within the NPPF's core principles that planning should proactively drive and support economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. It is emphasised that every effort should be made to objectively identify and then meet the business and other development needs of an area, with positive responses made to wider opportunities for growth.

3.05 The NPPF stresses the Government's commitment to securing economic growth in order to create jobs and prosperity, with the Government seeking to ensure that the planning system does everything it can to support sustainable economic growth. The need for planning to encourage and not to act as an impediment to sustainable growth is stated, and significant weight should be placed on the need to support economic growth through the planning system. The NPPF seeks to ensure that local planning authorities plan proactively to meet the development needs of business and support an economy fit for the 21st Century.

3.06 Paragraph 23 of the NPPF indicates that, to ensure the vitality of town centres, planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should, *inter alia*:

- recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas;
- promote competitive town centres and consumer choice;
- retain or enhance existing markets and, where appropriate, re-introduce or create new ones;
- 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; and
- where town centres are in decline, local planning authorities should demonstrate flexibility on issues such as format and scale.

3.07 With regard to the assessment of proposals for main town centre development, the NPPF retains the two key national policy tests relating to the sequential approach to development and to impact.

3.08 With regard to the former, paragraph 24 of the NPPF states that local planning authorities should apply a sequential test to planning applications for main town centre uses that are not in accordance with an up-to-date Local Plan. Paragraph 24 goes on to state that:

'They should require applications for main town centre uses to be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge of centre and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale.'

3.09 With regard to impact, the previous tests set out by Policy EC16.1 of PPS4 have been refined into what is effectively a twin test. Paragraph 25 of the NPPF states that:

'When assessing applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date Local Plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sq.m). This should include assessment of:

- **the impact of the proposal on existing, committed and planned public and private investment in a centre of centres in the catchment area of the proposal; and**

- **the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should also be assessed up to ten years from the time the application is made.'**

Regional Spatial Strategy for the East Midlands – 'East Midlands Regional Plan'

3.10 Although the Secretary of State announced the revocation of all Regional Spatial Strategies with immediate effect on 6 July 2010, this decision has since been overturned following the legal challenge by Cala Homes and the High Court's ruling of 10 November 2010. The abolition of Regional Spatial Strategies will therefore be achieved through the Localism Act 2011, which received Royal Assent on 15 November 2011. However, at the time of reporting, the relevant part of the Act has not been brought into effect and the East Midlands Regional Plan (RSS) remains part of the development plan and is of relevance to the progression of the LDF and to the consideration of future retail development proposals.

3.11 The RSS was published on 12 March 2009 and provides a framework for development and investment in the region over the period to 2026.

3.12 The RSS notes the identification of Lincoln and Gainsborough as New Growth Points in order to facilitate the delivery of agreed high growth targets. Policy 13a sets out minimum targets for the provision of housing across the region. The policy indicates a requirement for 2,030 dwellings to be constructed annually in Central Lincolnshire from 2006 (equating to 40,600 dwellings over the period 2006 to 2026), with the focus for development being the Lincoln Principal Urban Area (comprising the built-up parts of the City of Lincoln, North Hykeham, Waddington and Bracebridge Heath).

3.13 The Study Area is located within the RSS Eastern Sub-Area, where the Lincoln Principal Urban Area is expected to act as a focus for employment and services. Policy 4 indicates, *inter alia*, that development within the Eastern Sub-Area should:

- Strengthen the role of Lincoln as one of the Region's five Principal Urban Area;
- Ensure that the agreed Growth Point Programmes are achieved both in terms of overall numbers and in the agreed phasing of development; and
- Maintain and enhance the role of main and small towns as locally significant service and employment centres through the protection of existing retail and community facilities.

3.14 With specific regard to retail development, Policy 22 indicates that local authorities and other agencies should work together on a sub-area basis to promote the vitality and viability of existing centres, including those in rural towns. Where town centres are under-performing, action should be taken to promote investment through design led initiatives and the development and implementation of town centre strategies. The policy indicates that local planning authorities should:

- Within town centres bring forward retail, office, residential and leisure development opportunities, and any other town centre functions, based on identified need;
- Prevent the development or expansion of additional regional scale out-of-town retail and leisure floorspace; and
- Monitor changes in retail floorspace on a regular basis.

3.15 Lincoln is also the subject of a Sub-Regional Strategy which seeks to provide additional direction and guidance in the production of Local Development Documents on strategic issues which relate to the City of Lincoln and its surrounding hinterland. In particular, it aims to set out a sustainable strategic context for the strengthening of Lincoln's role as a Principal Urban Area. The Sub-Regional Strategy Lincoln Policy Area comprises:

- The whole of the City of Lincoln.
- The following wards in the district of North Kesteven: Bassingham, Branston & Mere, Cliff Villages, Eagle & North Scarle, Metheringham, Skellingthorpe, Washingborough & Heighington.
- The following wards in the district of West Lindsey: Bardney, Dunholme, Fiskerton, Nettleham, Saxilby, Scampton, Sudbrook, Welton.

3.16 Policy Lincoln Policy Area SRS 1 states that, in order to significantly strengthen Lincoln's role as a Principal Urban Area within the East Midlands, development plan documents and other relevant strategies should, *inter alia*:

- Seek to deliver the overall amount of new development required through the implementation of a more sustainable pattern of development throughout the Policy Area;
- Develop phased strategic urban extensions co-ordinated with the necessary infrastructure provision;
- Provide for economic regeneration and employment growth, including necessary infrastructure requirements, in an appropriately co-ordinated and phased manner;
- Reduce deprivation and promote social inclusion;
- Allocate development at locations which help minimise additional travel requirements;

- Promote the priority re-use of suitable previously developed land within existing settlements; and
- Facilitate mixed-use development.

3.17 Policy Lincoln Policy Area SRS 2 sets out the need to adopt a sequential approach to development, with the first preference being sites in Central Lincoln, followed then by other parts of the built up area of Lincoln and North Hykeham where such sites offer access to local facilities and to public transport.

City of Lincoln Local Plan

3.18 The City of Lincoln Local Plan was adopted in August 1998. Following the enactment of the Planning and Compulsory Purchase Act 2004, relevant development policies were saved by the Secretary of State's Direction of September 2007 and will remain part of the development plan until replaced by the Local Development Framework.

3.19 Policy 72A seeks to concentrate Class A1, A2 and A3, and other complementary uses, within defined 'Shopping Streets'. Within Lincoln's defined Primary Shopping Street, a minimum of 80% of the frontage should remain in Class A1 use.

3.20 Policy 72B states that planning permission for major new retail development may be granted in edge-of-centre locations where the local planning authority is satisfied that the proposed development will support the vitality of the Central Shopping Core and cannot be satisfactorily accommodated within it.

3.21 In accordance with Policy 72B (and other relevant saved policies of the Plan), Policy 73B indicates that the following locations may be suitable for additional retail warehousing development:

- Sites with frontages to Outer Circle Road;
- Canwick Road Trading Estate;
- St Marks, west of the River Witham;
- Tritton Road Retail Park;
- Tritton Road/Valentine Road/Matilda Road; and
- Lindis Retail Park.

3.22 The policy goes on to set out a series of conditions to appropriately restrict the format and goods sold from such development.

3.23 Policy 74A seeks to encourage development of an appropriate scale in District Mixed-Use Centres and Local Shopping Centres. In Local Shopping Centres, planning permission will be granted for retail uses which do not exceed 150 sq.m gross floor area and for **'small food supermarkets'**.

North Kesteven Local Plan

3.24 The North Kesteven Local Plan was adopted in September 2007, with it being saved in its entirety to remain as part of the development plan by virtue of the Secretary of State's direction of 17 September 2010.

3.25 The principal Local Plan retail policy is Policy R1, which indicates that planning permission will be granted for retail, service, indoor sport and recreation, and entertainment developments within an existing town centre provided that it is of a type and scale that is appropriate to the role of the particular centre, in accordance with the following approach to site selection:

i) development is directed firstly to existing centres where an identified need is to be met;
ii) if no suitable sites are found in existing centres then edge-of-centre locations and then out-of-centre locations will be considered.

3.26 The policy then goes on to identify the retail hierarchy in North Kesteven, this being as follows:

i) Sleaford Town Centre;
ii) The established centres in North Hykeham; and
iii) The centres of the service villages.

3.27 Planning permission for the main town centre uses stated in the policy will only be permitted outside of centres where:

a) A clear need for both the proposed development and the proposed form of development has been demonstrated;
b) It has been shown that there are no suitable sites within an appropriate centre;
c) The site proposed is the closest to an appropriate centre which is suitable and can reasonably be made available for the type of development proposed;
d) Adequate measures are to be taken to ensure that the development is accessible by public transport, foot and by bicycle;

e) The proposed development will not (either by itself or in conjunction with other proposals that have been permitted or can reasonably be anticipated) harm the vitality and viability of any of the District's established town or service village centres, or any centre in an adjacent District; or
f) The development proposed is minor in scale and caters exclusively for the locality, rather than depending on a wider catchment area for its viability.

3.28 Policy R2 provides for a mix of appropriate uses in Sleaford Town Centre but states that, within the Main Shopping Streets, uses other than those falling within Classes A1, A2 and A3 should not be located or concentrated in a way which detracts from the vitality and viability of the area as a focus for shopping and other retail orientated activities.

3.29 Policy R3 acts to safeguard existing facilities and states that planning permission will only be granted for development which would result in the loss of retail, social or community facilities that serve the local community only if:

i) There are adequate alternative facilities locally;
ii) Equivalent facilities have been, or are to be, provided elsewhere in the area; or
iii) The existing use is not viable in the longer term.

West Lindsey Local Plan

3.30 The West Lindsey Local Plan was adopted in June 2006, with still relevant policies being saved to remain as part of the development plan by the Secretary of State's direction of 11 June 2009.

3.31 Policy RTC 1 seeks to direct main town centre uses and attract housing development to the town centres of Gainsborough, Market Rasen and Caistor.

3.32 Policy RTC 3 indicates that, within the Primary Rural Settlement Boundaries, planning permission will be given for development falling within Use Classes A1, A2, A3, A4, A5 and D1, and community and service uses, provided that they:

i) Serve a local need only;
ii) Would not detract from the area's primary function as a local shopping destination;
iii) Do not harm the amenities of nearby residents;
iv) Include the provision of safe car parking facilities if they are not conveniently located nearby; and

v) Are of a scale design and character, which is reflective of and sympathetic to the surrounding neighbourhood streetscapes.

3.33 Policy RTC 4 states that planning permission will be granted for major non-food retail development, such as retail warehouses, factory outlets and major food retail developments provided that:

i) A sequential approach to site selection is adopted;
ii) A retail 'need' for the proposal is demonstrated outside of town centre locations;
iii) They would neither directly, or in combination with other committed development, damage the vitality and viability of identified town centres;
iv) They are located so that transport choices and accessibility can be maximised;
v) Parking provision is restricted to the agreed maximum level set out in the appendices for this type of proposal; and
vi) They are of a design, scale and character which is sympathetic to the surrounding landscape or townscape.

3.34 Within town neighbourhoods and villages, Policy RTC 6 states that planning permission will be granted for Class A1 retail development proposals, provided that, *inter alia*, they are small in scale and serve a local need only.

Central Lincolnshire Core Strategy Issues and Options

3.35 The City of Lincoln, North Kesteven District and West Lindsey District authorities are jointly preparing a Core Strategy for their collective area. The Central Lincolnshire Core Strategy Issues and Options Paper was published for consultation over a six week period between 25 October 2010 and 6 December 2010.

3.36 The Draft Vision for the Central Lincolnshire area provided by the Issues and Options paper states an aspiration to create a better place where the quality of life and well-being of communities have improved. Investment in infrastructure and development will be targeted towards the most sustainable and viable locations, with traffic improvements seeking to minimise further traffic growth.

3.37 The Issues and Options document is structured around five key themes which affect Central Lincolnshire's future, these being as follows.

- Theme 1: Sustainable Development;
- Theme 2: A Low Carbon Future;
- Theme 3: Growing Central Lincolnshire;
- Theme 4: Strong and Prosperous Communities; and
- Theme 5: A Quality Environment.

3.38 In respect of the third theme, the Issue and Options paper indicates that the three local authorities have been working together for a number of years to develop and implement a growth strategy for Central Lincolnshire (which was incorporated into Regional Spatial Strategy policy). With regard to existing Growth Point designations, the Issues and Options paper states that:

'The Lincoln area and Gainsborough both have Growth Point status in recognition of their role as major centres for housing growth and regeneration. Growth Points have access to Government funding to help with the planning and delivery of new housing and infrastructure in their area.

Future levels of funding have yet to be determined, but the Coalition Government has confirmed that existing Growth Points will be retained.

The Lincoln area was designated as a Growth Point before the completion of the RSS, so its growth objectives are already reflected in the RSS housing figures. However, Gainsborough's Growth Point status postdated the RSS. The JPU will therefore test Gainsborough's growth aspirations and consider a housing figure for the Gainsborough area as part of the wider review of growth in Central Lincolnshire.'

3.39 With regard to retail and town centre development, the Issues and Options paper indicates that central Lincoln and the major towns are considered to be the most sustainable locations for such uses. However, the Issues and Options Paper notes that:

'...focusing facilities exclusively in these major settlements would risk worsening rural deprivation and increase the need to travel by rural dwellers. Similarly, urban neighbourhoods and suburbs also require their own local facilities to support local communities and reduce deprivation.

The Core Strategy must find an appropriate balance supporting facilities in rural areas without undermining the sustainability of Central Lincolnshire as a whole.'

4.0 Existing Masterplan Frameworks

Introduction

4.01 In addition to adopted development plan policy, a number of Masterplan documents have emerged in recent years which seek to establish strategic aims for growth and to identify individual sites which have the potential to accommodate future development. The Masterplan documents are of particular relevance to this study in identifying sites which may be suitable for redevelopment for retail purposes. The three Masterplans of relevance relate to Gainsborough, Lincoln and Sleaford.

Gainsborough Regained - The Masterplan (2007)

4.02 West Lindsey District Council in partnership with Lincolnshire County Council and Lincolnshire Enterprise commissioned a team of consultants to prepare a long-term vision and Masterplan for the town of Gainsborough and the adjoining parishes of Lea and Morton.

4.03 In summary, the Masterplan has put forward a number of measures to address several key aspects which include:

- To set out a clear signal of intent both locally and regionally in terms of managing growth and quality – where does Gainsborough want to be in 20 years and beyond?;
- Gainsborough's spatial future – in strategic terms, the need to establish a spatial framework for the town whilst considering environmental constraints and community views;
- Quality of life – consider measures to address the significant levels of socio-economic depravation through a package of interventions targeted at the most deprived communities;
- A strong town centre – within the central parts of the town centre, address the impacts that will result from the development of Marshall's Yard, and the need to improve several aspects of the town centre; and
- Community representation – to engage the local community in the Masterplan process and develop a coordinated community representative body.

4.04 In terms of the town centre, the Masterplan identifies that whilst it acts as the main centre for West Lindsey, it is not a high quality centre and the impacts of competing centres such as Lincoln and Meadow Hall are clear to see with a lack of multiple representations on offer that do not match the towns size and community requirements. The Masterplan recognises that the development of Marshall's Yard will change this position.

4.05 In fact, the Masterplan recognises that the Marshall's Yard and existing Tesco development will shift the retail focus of the town centre to the east, and that whilst this new investment is clearly welcome, it will require a strategy to ensure that the impact that this will have on the rest of the town centre is addressed.

4.06 In seeking to deal with this, the Masterplan identifies the Riverside area and buildings such as the Old Hall and All Saints Church, together with several high quality buildings around the core of the area to be the key assets of the town and to provide the framework for establishing a greater level of cultural and leisure activity in the town centre. Connected to this, the Masterplan identifies a number of key sites which will be critical to the long-term success of the town centre and that these sites, once developed, will incorporate a range of uses such as residential, leisure and commercial activity.

4.07 It is important that this Retail Study considers the future needs for Gainsborough in more detail and revisits sites identified within the Masterplan to explore realistically what can be delivered and how the needs identified can be met by the town centre in the future. This will also involve examining the overall impact of Marshall's Yard on the rest of the town centre, and how the two may be better integrated in the future.

Linking Lincoln – Enquiry by Design (2006)

4.08 As part of Enquiry by Design, the Prince's Foundation takes a unique and holistic approach to regeneration, where the community and its people are key to any socio-economic and physical revival. This process is carried out in partnership with the local authorities and leads to the production of an idealistic vision in the form of a Masterplan providing guidelines for future development. During a number of preliminary workshops, managed and facilitated by the Prince's Foundation in 2005, it became clear that the City of Lincoln, and more specifically its centre, had to deal with a number of inherent weaknesses that effect components of its urban structure.

4.09 An overall strategy for the wider city based on the principals of sustainable neighbourhoods was developed during these workshops which helped gain a clearer view of the Lincoln context and how these different components related to each other globally and more specifically to the city centre.

4.10 This overall process resulted in the evolution of a Masterplan for the city centre, a movement and retail strategy, and a design brief for a number of key sites within the Study Area.

4.11 Section Five of the Masterplan provided a number of design briefs for key intervention sites which were broken down into five categories which included:

- The High Street;
- The Western Loop;
- The Eastern Loop;
- The Cultural Quarter; and
- The Highway Projects (Streets and Junctions).

4.12 Given that the Masterplan was conceived in 2006, it will be important for this study to reflect upon further retail development that has been secured within the city centre since that time, and how relevant the potential opportunities identified within the Masterplan could be for accommodating future retail development through to 2026. This will also need to reflect upon the future retail needs identified within this study and how best these can be accommodated within the city centre and throughout the Central Lincolnshire area as a whole.

Sleaford Masterplan (2011)

4.13 A team of consultants were appointed by North Kesteven District Council and Lincolnshire County Council and the Homes & Communities Agency to prepare a 25-year Masterplan for Sleaford. The Sleaford Masterplan proposals are intended to guide the Local Development Framework process by identifying options for delivering and securing the sustainable growth of Sleaford in the future.

4.14 The vision in which the Masterplan is founded is as follows, **'In 2036, Sleaford is a bigger, better, more confident place with a thriving retail centre, a keen sense of history and a clear idea of where it is going.'**

4.15 In seeking to achieve this vision, the consultants examined a wide range of options including the location of future residential growth and the provision for community infrastructure, as well as looking at the needs of new communities and the provision of local services. Building on the significant baseline research undertaken as part of the study and the lengthy community consultation, the Sleaford Masterplan identifies two strategic aims which are as follows.

Strategic Aim 1

4.16 To plan positively for the future growth by investing in infrastructure and creating well connected communities. This strategic aim has a number of key actions identified, including:

- A shortlist of housing sites providing for circa 3,500 to 4,000 dwellings during the 25-year Masterplan period;
- A series of strategic employment sites have been identified to supplement existing allocations;
- To improve and promote alternatives to private car uses;

- Reposition and rationalise parking to strategically locate car parks on the radial approaches to the town;
- Promote the use of the A15 and A17 bypasses as primary routes when moving around Sleaford;
- Introduce a parking strategy that prevents parking in inappropriate locations around the town;
- Reconfigure the town centre one-way system to two-way where possible;
- Introduce access restrictions to the central Sleaford;
- Introduce a delivery/servicing strategy for the centre of Sleaford;
- Provide a school strategy to accommodate future population growth;
- Provide an east/west link across the town to overcome current congestion;
- Provide a series of measures to improve connections and town centre services with surrounding villages; and
- Provision of a range of retail units within the centre to attract a wider offer.

Strategic Aim 2

4.17 Fulfil the town centres potential by creating a high quality environment and opportunities for new retail and attractions. Here, the Masterplan proposes a comprehensive strategy including:

- A series of projects to unlock the town centre potential, including:
  - A circle of perimeter car parks to improve pedestrian links to the town centre;
  - Reconfigure the one-way system to two-way where possible;
  - A flexible public realm which allows a potential for vehicle access restrictions to the central Sleaford;
  - Improve bus services with more frequent services; and
  - Provide more pedestrian and cycle routes.
- A series of projects to create a pedestrian focussed environment:
  - Transform the street environment and appearance; and
  - Improve public spaces and create high quality settings for town centre assets.
- Deliver a series of destinations:
  - Deliver Tesco and southern Southgate regeneration;
  - Reinforce the north of the town centre;
  - Enhance Sleaford's waterside environment; and
  - Transform Money's Yard into a new attraction that links the town centre to a national centre for craft and design.

4.18 The strategic approach identified for Sleaford town centre will be informed by the findings of this Retail Study and vice versa. One of the major issues identified in the baseline evidence gathered for the preparation of the Masterplan was the significant leakage of comparison goods expenditure from the local community to key competing centres elsewhere. The strategic objectives identified within the Masterplan seek to reverse the high level of leakage by providing new retail opportunities and destinations within and on the edge of the town centre. The Masterplan already makes provision for the relocation of the existing Tesco foodstore which now has planning permission. However, the Masterplan also identifies a number of other opportunities within the town centre which could accommodate future retail development to help retain greater levels of expenditure within the local area.

4.19 The current level of leakage is explored in greater detail in later sections of this study, along with the potential for identified sites to meet the future needs of Sleaford and its local community.

Scoping Study for North and South Hykeham (2011)

4.20 The Scoping Study for North and South Hykeham was published in June 2011 and assesses the issues which will need to be addressed in successfully planning for Hykeham's future development. The Scoping Study identifies that Hykeham's retail offer is somewhat fragmented, being effectively located at four separate sites: the Old Village Green, the A1434 Crossroads, the Forum and the Asda store. The latter two facilities are considered to be trading well, with the former perceived to be weaker in retail terms.

4.21 The Scoping Study indicates that, whilst there is a community objective to create a 'centre' for North Hykeham, the nature of the A1434 Newark Road is such that it may be more feasible for two centres to be created, rather than one which attempts to 'straddle' the highway. Paragraph 5.3 of the Scoping Study concludes that:

'Overall, retail supply is becoming constrained. Careful consideration needs to be given to where retail growth is directed by planning policy to aide the cohesiveness of Hykeham's overall offer, not exacerbate traffic and car parking issues and help build the sense of community.'

5.0 Summary of the Vitality and Viability of Key Retail Centres

Introduction

5.01 The NPPF recognises the important of maintaining viable and vital town centres which provide appropriate customer choice. However, the NPPF is, by its very nature, a concise document and we note that it fails to provide significant guidance in terms of the assessment of the role performed by centres and the monitoring of their performance over time.

5.02 Accordingly, in the absence of more up to date direction, Annex D of PPS4 remains relevant. Annex D sets out a number of indicators which can be used to ascertain the relative health of a particular centre. The indicators comprise the following:

- **Diversity of main town centre uses (by number, type and amount of floorspace):** an Experian Goad land use plan has been used to assess the diversity of uses in the four main town centres of Gainsborough, Lincoln, Market Rasen and Sleaford;
- **The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations:** consideration has been given to the scale of out-of-centre retail provision in the three authority areas;
- **The potential capacity for growth or change of centres in the network:** opportunities for the expansion of the main centres have been considered, including the scope for more intensive development on previously developed land;
- **Commercial operator representation and intentions to change representation:** derived from the land-use surveys, town centre business surveys and FOCUS reports from outstanding retailer demand;
- **Shopping rents – the average Zone A rents paid in centres:** derived from available published data;
- **Proportion of vacant street level property:** derived from land-use surveys;
- **Commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental):** derived from Valuation Office Agency data;
- **Land values and the length of time key sites have remained undeveloped:** based on data on changes in land value and observations ‘in the field’ on how long key town centre and edge-of-centre sites have remained undeveloped;
- **Pedestrian flows:** from on-site observations;
- **Accessibility:** from on-site observations;
- **Customers’ and residents’ views and behaviour:** derived from household survey;
- **Perception of safety and occurrence of crime:** from on-site observations; and
- **State of town centre environmental quality:** also from on-site observations.

5.03 The commentary below provides an overview of our analysis of the health of the four main town centres, with reference to their performance over time. The commentary is supplemented by a more detailed appraisal of available data pertaining to the centres' performance against the above criteria, and our observations in surveying each centre, which is provided as Appendix 1. The comprehensive appraisal provides full details of published data sources such as Management Horizons Europe (MHE), Experian Goad, FOCUS and the Valuation Office Agency (VOA). The summary provided below considers the four main centres of Gainsborough, Lincoln, Market Rasen and Sleaford, before then providing an overview of the performance of smaller key service centres throughout the three authority areas.

Gainsborough

5.04 Gainsborough is the largest settlement in West Lindsey and provides an important role as a retail and service destination for the local area. The site visit in July 2011 identified a total of 199 units in the town centre, comprising a total gross floorspace of 52,600 sq.m.

5.05 The pedestrianised areas of Market Place, Silver Street and Lord Street accommodate the majority of the retail and service units, with additional stores also located on Church Street, Market Street and North Street. The development of the Marshall's Yard scheme has allowed Gainsborough Town Centre to improve its retail offer and attract greater numbers of shoppers. The site provides a number of large units in the town centre, and accommodates several national operators who would have been unlikely to locate within the existing town centre core due to the lack of adequate high quality floorspace. The scheme has also strengthened the profile of Gainsborough Town Centre, with it rising significantly in the Venuescore town centre rankings from 611th in 2007 to 354th in 2010.

5.06 The contrast between the large purpose-built scheme at Marshall's Yard and the remaining shopping streets is distinct, with the site visit clearly illustrating the variation of the two areas in terms of the pedestrian activity and vacancy rates. The older parts of the centre have suffered from this shift in focus to the east, with the presence of national operators at Marshall's Yard providing a clear focus of activity. Nevertheless, recent investment and improvements in the public realm has helped to ensure that the pedestrianised traditional shopping streets of the town centre still provide an important part of Gainsborough's offer and accommodate a number of national multiple operators, including Sports Direct, the Co-op department store, Argos and Boots.

5.07 In terms of the diversity of uses in Gainsborough, the town centre character is broadly similar to the national average figures, though there is a shortfall in leisure services (restaurants, cafes, bookmakers, public houses and so on), both in the number of leisure service operators and the quantum of floorspace dedicated to this sector in comparison to the national average. Whilst the

Marshall's Yard development has attracted several new leisure service operators to Gainsborough (including Prezzo and Costa), there is still an under-representation of this sector within the town centre.

Lincoln

5.08 Lincoln is a popular retail and leisure destination, with the historic city centre attracting a significant number of tourists and shoppers each year. It has a large amount of floorspace (171,350 sq.m across 681 units) and a strong representation from national retailers, which reflects its role as an important sub-regional shopping centre.

5.09 The majority of the retail units in the city centre are concentrated along the pedestrianised areas of High Street, Cornhill, Saltergate and Guildhall Street, which provide a safe, pleasant and popular shopping environment for visitors to the city. The level crossing on High Street, however, can act as a barrier between the northern and southern parts of the centre, though the site visit indicated that there was still a considerable level of pedestrian activity and movement between the primary shopping area and St Marks Shopping Centre to the south. Lincoln also includes a number of out-of-centre retail parks which accommodate numerous national operators in large, modern retail and leisure service units. In addition to the main retail core and nearby retail parks, Lincoln's offer is supplemented by the historic Cathedral Quarter area to the north of the city centre, which accommodates a mix of independent art, craft and gift shops. The Quarter benefits from its proximity to both Lincoln Cathedral and Lincoln Castle, and was the subject of extensive public realm improvements in 2010 which have further enhanced its appeal.

5.10 In terms of the diversity of use of the units, the amount of convenience units and floorspace in the city centre is below the national average, with the largest foodstore units tending to be located in the out-of-centre retail parks. There is a significant amount of comparison goods floorspace in Lincoln, with the House of Fraser, Marks and Spencer, Primark and BHS stores being the largest units within the centre. Other comparison stores are located at St Marks Retail Park (including Toys R Us and Homebase), St Marks Shopping Centre (including Debenhams and Sports Direct) and Tritton Retail Park (including Comet and SCS). Brayford Wharf is the key leisure sector destination in Lincoln City Centre, with the numerous popular restaurants and bars located next to the Odeon cinema multiplex. The vacancy rates in Lincoln City Centre are broadly similar to the national average figures, with the majority of vacancies noted from the site visit in July 2011 located in the more peripheral areas of the city centre.

Market Rasen

5.11 Market Rasen is an important small market town in the east of West Lindsey District, with the 88 units comprising a total floorspace of 11,200 sq.m. The collective presence of the national convenience operators of Co-op, Nisa and Tesco foodstores helps to meet the food shopping needs of local residents.

5.12 In terms of the diversity of units in Market Rasen, the town centre's characteristics are broadly comparable to national average figures, though in terms of the amount of floorspace, there are several notable differences. In particular, the town is characterised by a higher than average number of convenience goods operators which provide a higher than average quantum of convenience goods floorspace, a relatively low quantum of comparison goods floorspace, and slightly above average amounts of both leisure service and financial and business service floorspace.

5.13 The site visit identified a limited representation of national retailers in the town centre, with only one of the top 18 retailers identified by Focus[21] having a presence in Market Rasen (this being Boots, which is located on Queen Street). The lack of high quality and larger retail units available in the town may also act to deter national operators from locating in the centre. The environmental quality of Market Rasen could also be improved in order to attract new retailers, with the tired appearance of several of the buildings detracting from the overall offer of the centre.

Sleaford

5.14 Sleaford is the largest centre in North Kesteven, with its 196 units providing a total gross floorspace of 38,110 sq.m. The town centre is a popular retail destination and provides an important service to the predominantly rural local community in the outlying area.

5.15 In terms of the diversity of use of the units in Sleaford, the proportion of convenience, comparison, leisure service, financial and business service, and vacant units is broadly similar to the national average. The proportion of units in retail service use in the centre is above the national average level. The amount of comparison goods and leisure service floorspace is below the national average, whilst the amount of retail service, financial and business service and vacant floorspace is above the national average level.

5.16 The three largest units in the centre of Sleaford, which were previously identified as being vacant by GOAD in October 2009, remained vacant at the time of WYG's survey in July 2011. These long-term

[21] Full details of the top retailers identified by Focus are provided in Appendix 1

vacant units include the former Flicks cinema unit on Southgate and the former Corn Exchange unit on Market Place, with the development potential of the latter site reviewed as part of the recent Sleaford Masterplan. The site visit identified that the vacant units in the town centre tend to be of a poor standard and generally ill-suited to the needs of modern retailers.

5.17 The number of national operators in Sleaford is limited for a centre of its size and catchment, with only two of the top 18 operators identified by Focus located in the town. The Sainsbury's and Tesco stores are also both relatively modest in size for the number of shoppers they serve, though the proposed new Tesco store development to the south of the town centre will help to address this.

5.18 In terms of the potential for new convenience and comparison goods floorspace, the Sleaford Masterplan notes that **'the provision of adequately size and modern high quality units is a must to attract modern retailers.'** It also notes that provision should be made for an anchor store (in addition to the Tesco proposals) of between 1,858 sq.m to 2,787 sq.m, with additional provision for two to three retail units of between 464 to 929 sq.m to accommodate mid-size operators, and 10 to 13 further units under 464 sq.m. The Masterplan recognises that accommodating large units within the centre may provide difficult, due to constraints arising from the Conservation Area status and the presence of Listed Buildings, but seeks to identify appropriately located sites to address this perceived deficiency. The site visit also identified congestion as being a major problem in the town centre, with the Sleaford Masterplan outlining several solutions to address existing issues through new traffic management arrangements.

Key Service Centres

5.19 WYG has assessed the health of 23 identified and proposed key service centres in Central Lincolnshire. The centres considered comprise those formally designated by adopted development plan documents and those identified as effectively performing the function of a defined centre by previous research, namely the City of Lincoln Retail and Town Centre Study which reported in 2007.

5.20 Our analysis of the centres has indicated that the majority are performing well, appear to be trading healthily and perform a key role serving the local population. However, it is apparent that a relatively small number of the centres are performing poorly, with the site visits indicating that the health of these centres may be vulnerable to decline.

Table 5.1: Diversity of Central Lincolnshire Key Service Centres

Centre	Convenience		Comparison		Service		Vacancy		Total	
	No.	%	No.	%	No.	%	No.	%	No.	Total
1. Bardney	2	16.7%	2	16.7%	6	50.0%	2	16.7%	12	100.0%
2. Billinghay	1	16.7%	0	0.0%	3	50.0%	2	33.3%	6	100.0%
3. Birchwood	4	16.0%	8	32.0%	11	44.0%	2	8.0%	25	100.0%
4. Bracebridge Heath	4	22.2%	1	5.6%	9	50.0%	4	22.2%	18	100.0%
5. Burton Road	4	16.0%	9	36.0%	11	34.0%	1	4.0%	25	100.0%
6. Caistor	4	13.8%	5	17.2%	15	51.7%	5	17.2%	29	100.0%
7. Cherry Willingham	3	30.0%	1	10.0%	6	60.0%	0	0.0%	10	100.0%
8. Heckington	3	15.8%	4	21.1%	10	52.7%	2	10.5%	19	100.0%
9. Keelby	2	28.6%	0	0.0%	5	71.4%	0	0.0%	7	100.0%
10. Metheringham	4	22.2%	4	22.2%	8	44.5%	2	11.1%	18	100.0%
11. Monks Road	2	28.6%	0	0.0%	4	57.2%	1	14.3%	7	100.0%
12. Navenby	3	13.6%	4	18.2%	13	59.1%	2	9.1%	22	100.0%
13. Nettleham	3	20.0%	2	13.3%	10	66.7%	0	0.0%	15	100.0%
14. Nettleham Road	4	25.0%	4	25.0%	8	50.0%	0	0.0%	16	100.0%
15. Newark Road	2	9.5%	9	42.9%	8	38.1%	2	9.5%	21	100.0%
16. North Hykeham	9	15.8%	17	29.8%	30	52.6%	1	1.8%	57	100.0%
17. Ruskington	7	21.2%	10	30.3%	16	48.5%	0	0.0%	33	100.0%
18. Saxilby	3	21.4%	2	14.3%	8	57.1%	1	7.1%	14	100.0%
19. Scotter	3	20.0%	0	0.0%	12	80.0%	0	0.0%	15	100.0%
20. The Junction	4	36.4%	1	9.1%	6	54.5%	0	0.0%	11	100.0%
21. Waddington	2	16.7%	2	16.7%	8	66.6%	0	0.0%	12	100.0%
22. Welton	2	22.2%	2	22.2%	5	55.5%	0	0.0%	9	100.0%
23. Wragby Road	4	22.2%	5	27.8%	9	50.0%	0	0.0%	18	100.0%
National Average	**-**	**8.6%**	**-**	**33.5%**	**-**	**45.9%**	**-**	**11.7%**	**-**	**-**

Source: Site Visits, July 2011 and May 2012; UK Average Figure, Goad, April 2011

5.21 The centres vary significantly in size and diversity, from the smallest centre of Billinghay, accommodating six units, to North Hykeham, which overall accommodates 57 units. In terms of the proportion of units in use for the sale of convenience goods in each of the 23 centres, as Table 5.1 demonstrates, our survey work has identified that all of the centres accommodate a higher percentage of units than the national average rate of 8.6%, with the centres of Cherry Willingham (30.0%), Scotter (30.0%) and The Junction (36.4%) featuring a particularly high percentage of convenience units. These convenience units provide an essential service for the 'top-up' shopping needs of the local community in Central Lincolnshire. Whilst the centres of Burton Road (36.0%) and Newark Road (42.9%) perform strongly in terms of the percentage of comparison goods, the average proportion of units in comparison goods retail use across the centres (17.8%) is below the UK average figure of 33.5%.

5.22 Retail services and leisure services are also generally well represented in the centres compared to the national average. In terms of the number of financial and business service units in the centres, only the percentage of units at North Hykeham (14.0%) is above the national average figure of 11.0%, with 18 of the 23 centres not accommodating any financial and business service units. The overall vacancy rates for the centres is below the national average (11.7%), though the centres of Bardney (16.7%), Bracebridge Heath (22.2%), Billinghay (33.3%), Caistor (17.2%) and Monks Road (14.3%) all have higher than average figures. The site visit identified that there were no vacant units in ten of the centres. It is relevant to note in this regard that Billinghay only numbers six units in total and that the vacancy rate in this centre actually equates to two properties. In addition, nine centres were found to have no vacant units whatsoever.

5.23 The site visits identified that the overall environmental quality of the 23 centres is generally good, with a high level of maintenance and care evidently being taken in the majority of centres. Whilst Newark Road (Bracebridge) was deemed the centre with the lowest environmental quality, largely due to its location on a busy route into Lincoln City Centre, in terms of the vacancy rates in the area it performed well. It also provides an important role as a comparison goods and retail service destination, with the Tesco Express store also helping to attract new shoppers to the local area.

5.24 Appendix 2 provides a map setting out the location of each of the four main centres, the 23 existing and proposed key service centres, and the retail parks which have been surveyed as part of the study.

Identification and Designation of Key Service Centres

5.25 As part of the Study, we have been asked to review the appropriate designation of each of the above key service centres located within the Lincoln Principal Urban Area, which we identify as being: Birchwood, Bracebridge Heath, the Junction of Boultham Park Road and Skellingthorpe Road, Nettleham Road, Newark Road (Bracebridge), North Hykeham, Waddington and Wragby Road. Bracebridge Heath, North Hykeham and Waddington are located within the North Kesteven administrative area, with the others being located within the City of Lincoln. We have also provided updated analysis and recommendations in respect of the previously identified (by the City of Lincoln Retail and Town Centre Study of 2007) potential designations at Burton Road and Monks Road.

5.26 In the absence of any revised definition in the NPPF, the review which follows at paragraph 5.31 is necessarily based upon the definition of Local and District Centres provided by Annex B of PPS4, which states that:

'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.'

5.27 In addition, we have also considered the potential for existing concentrations of shops in the built up part of Gainsborough and Sleaford to serve as defined Local or District Centres. In this regard, we note that officers have previously considered the ability for defined centres to be provided at Morton (to the north of Gainsborough) and at Lea (to the south). However, in WYG's view, neither of these settlements benefits from a concentration of shops and facilities akin to that which could be considered a defined centre. Indeed, Morton – which provides the stronger offer of the two settlements – accommodates a small Co-op food supermarket in close proximity to the local village pub, but without any significant additional supporting services.

5.28 In considering the offer in these two settlements, we note that PPS4 directed that, **'Small parades of shops of purely neighbourhood significance are not regarded as centres for the purposes of this policy statement.'** Accordingly, given the limited scale and function of existing shops and services in these two settlements, we do not consider that either currently accommodates either a District or Local Centre. Similarly, we are unaware of any concentrations of shops and services in Sleaford which perform a Local or District Centre function.

5.29 The status and designation of additional key service centres which are located outside of the defined Lincoln Principal Urban Area and outside the built up parts of Gainsborough and Sleaford will be the subject of a wider forthcoming review to inform the production of the forthcoming Site Allocations Development Plan Document.

Birchwood

5.30 Birchwood is designated as a District Mixed-Use Centre in the adopted City of Lincoln Local Plan and is located approximately 5 km to the south west of Lincoln City Centre. The retail element of the centre comprises the purpose built Birchwood Centre shopping precinct, which originally opened in the 1980s, and which was recently the subject of a comprehensive refurbishment programme which was completed at the start of 2011.

5.31 Our survey of July 2011 indicates that the centre provides 25 units, with the key anchor tenants including a Co-op supermarket and a Poundstretcher. The centre has a good range of convenience and comparison shops, and provides a number of services, including a post office (located within Martin's convenience store), two public houses and four takeaways. At the time of survey, there were only two vacant units. The centre benefits from a substantial amount of dedicated parking and is also well positioned to allow for walk-in custom from surrounding area, which is predominantly residential in character.

5.32 The centre was extremely busy on the day of survey and its apparent popularity would appear to be corroborated by the significant investment in the form of its recent refurbishment. A medical centre and library are located directly to the north of the Birchwood Centre shopping precinct and, given the broad range of services provided, it is considered that Birchwood functions as a District Centre in accordance with the PPS4 definition.

Bracebridge Heath

5.33 Bracebridge Heath is located approximately 3.5 km to the south of Lincoln City Centre and is identified as a Village Centre by the adopted North Kesteven Local Plan Proposals Map. The centre takes the form of an 'inverted Y-shape', with the police station, doctor's surgery and The Bull public house at the northern end of the centre; the currently vacant Blacksmith Arms public house and a Tesco Express at the south eastern end; and the Co-op, Martin's newsagent, St John's Community Primary School and St John the Evangelist Church at the south western end.

5.34 In total, Bracebridge Heath incorporates 18 commercial and service units, of which four of these are vacant. There is a good provision of convenience units in the centre, namely a Co-op, Martin's convenience store, Tesco Express and a confectioners. Other retail units in the centre include a Co-op pharmacy, Post Office, two hairdressers and a beauty salon. There is an adequate level of parking facilities at the Co-op and Tesco stores, with the centre appearing to be trading well on the day of the site visit. There are also a number of other additional facilities in Bracebridge Heath, including a primary school, taxi office and library.

5.35 Given its modest size and catchment, it is evident that Bracebridge Heath functions as a Local Centre in accordance with the PPS4 definition, albeit one with a strong community use offer.

Burton Road

5.36 Burton Road is located approximately 1.5 km to the north west of Lincoln City Centre. It currently has no formal designation, with its potential to be formally designated as a centre being considered by the previous City of Lincoln Retail and Town Centre Study of 2007. Our survey of the centre indicates that it provides 25 units, set out in a linear manner on either side (but predominantly the eastern side) of Burton Road.

5.37 Burton Road accommodates four convenience units (including a Co-op and a McColl's), nine comparison units, four retail services (including a post office), seven leisure services (including a pub) and a single vacant unit. There is a good range of retailers and services present in the centre, which appeared popular and well used on the day of survey. However, although the centre contains a reasonably large number of units, they occupy, almost without exception, very small floorplates and cater for a local catchment. Accordingly, given the additional lack of any real financial or civic services, we consider that Burton Road principally displays the characteristics of a Local rather than District Centre and should be identified as such.

Junction of Boultham Park Road and Skellingthorpe Road

5.38 The Junction of Boultham Park Road and Skellingthorpe Road is similarly designated as a District Mixed-Use Centre in the adopted City of Lincoln Local Plan and is located approximately 3 km to the south of Lincoln City Centre. The centre provides a total of 11 units, all of which were occupied at the time of survey. Key tenants include a Premier convenience store (incorporating a post office), a Co-op foodstore and a separate Co-op Pharmacy. Both the Premier and Co-op foodstores are very limited in size and perform a 'top-up' or occasional shopping function. Other uses comprise two further convenience retailers, a hairdresser, three takeaways, a pub and a bookmaker.

5.39 There is limited parking space available in front of the units, with most shoppers tending to use the on-street parking available along Boultham Park and Skellingthorpe Road. The lack of parking and, in particular, the fact that units are limited in both size, variety and number, results in the facility performing the role of a Local Centre only.

Monks Road

5.40 Monks Road contains a relatively small concentration of shops, situated around 1km to the east of Lincoln City Centre. It currently has no formal designation, but was considered to have potential to be formally designated as a centre by the previous City of Lincoln Retail and Town Centre Study of 2007.

5.41 Monks Road's offer is clearly focused around the Co-op foodstore, which is of a reasonable size (with an estimated sales area of 236 sq.m), supplemented by a limited number of smaller units. In total, Monks Road provides two convenience units, three retail services and one leisure service unit. The units benefit from a significant degree of passing trade in this location and, given the importance and attraction of the Co-op store, it is considered to perform a Local Centre function (albeit it functions at the lower end of how a Local Centre could be expected to).

Nettleham Road

5.42 Nettleham Road is located approximately 2.5 km to the north west of Lincoln City Centre and is again designated as a District Mixed-Use Centre by the adopted City of Lincoln Local Plan. The centre provides 16 units, including four convenience stores (including Asda, Iceland and a Waitrose superstore), four comparison units, three retail services (including a post office), and five fast food outlets. At the time of survey in July 2011, there were no vacant units.

5.43 Nettleham Road benefits from dedicated parking and appears to be very well used, albeit the units which form the shopping precinct at the eastern part of the centre are somewhat dated in appearance. However, the centre provides a relatively large amount of floorspace, with a commensurate amount of dedicated car parking at both the shopping precinct and at the Waitrose store to the west. Whilst relatively few services are provided at the centre (and no public facilities whatsoever are provided), the strength and scale of the retail services are such that we consider it essentially performs the role of a District Centre and should be designated as such.

5.44 Notwithstanding this, in considering the function of the centre, we note that the Waitrose store is geographically separated from the remainder of the centre by both Nettleham Road and by the store's car parking, and any future expansion of the centre should seek to take any opportunities to improve linkages and the integration of the centre's component parts.

Newark Road (Bracebridge)

5.45 Newark Road is located approximately 3 km to the south of Lincoln City Centre and is identified as a District Mixed-Use Centre in the adopted City of Lincoln Local Plan. Our survey of the centre indicates there to be 21 units, two of which were vacant at July 2011. Of the remainder, there are two convenience stores (Tesco Express and a Premier convenience store), nine comparison stores, three retail services and five leisure services. The Tesco Express is the single largest unit and acts to provide a focus and an anchor for the centre, both as an attractor of custom and through the availability of off-road parking.

5.46 The centre is linear and is focused around the area of Newark Road where Victoria Street (which runs to the east) is formed. The provision is relatively 'patchy' with retailers, services and other facilities (including Bracebridge Library) interspersed with residential dwellings. However, there are a number of crossing points across the road and the potential for one trip to result in visits to different facilities. Accordingly, notwithstanding the non-contiguous nature of the provision, the facilities clearly function together as a 'centre'.

5.47 However, the centre is focused around generally small-scale retail provision which serves a localised catchment. Accordingly, we consider that Newark Road functions as a Local Centre and should be designated as such.

North Hykeham

5.48 North Hykeham is located approximately 8 km to the south of Lincoln City Centre and effectively comprises four constituent parts, these being: the standalone Asda store; the Forum shopping centre; units focused around the Station Road – Newark Road crossroad; and Old Hykeham. None of the four areas is formally designated as a defined centre by the adopted North Kesteven Local Plan Proposals Map.

5.49 The principle groupings of activity occur at The Forum shopping centre, which fronts Newark Road and provides 28 units grouped in a horseshoe shape, and Old Hykeham, which provides 12 generally small-scale units in a purpose built precinct close to the junction of Lincoln Road and Moor Lane.

5.50 The Forum is anchored by a Tesco Express store (formerly trading as a Somerfield), which opened for trading in February 2008, and also provides a further three convenience stores, eight comparison stores, three retail services, five leisure services and eight business services. At the time of survey in July 2011, there were two vacant units. The Forum appears to be trading strongly, which is evidenced by the low level of vacancies and the high footfall on the day of visit. Given the range of retailers and general services, it is evident that The Forum serves a District Centre function.

5.51 Old Hykeham is smaller in scale, but appears similarly healthy, providing one convenience operator (a Co-op foodstore), three comparison units, three retail services (including a post office) and four leisure service units. The centre also accommodates a medical centre and a physiotherapist. There was a single vacant unit at the time of survey. The overall scale of retail provision is such that the centre's catchment area is clearly limited and we consider that it performs the role of a Local Centre independently from other provision in North Hykeham.

5.52 Elsewhere, the Asda store is physically detached from the remainder of North Hykeham's retail offer and units situated at the junction of Station Road and Newark Road are separated by busy roads and have little sense of functioning as a single entity. Accordingly, in our view, neither currently appropriately fulfils the role of a centre.

Waddington

5.53 Waddington centre is located at the junction of Grantham Road and Bar Lane, and is defined as a Village Centre by the adopted North Kesteven Local Plan Proposals Map. The centre accommodates a total of 12 units, including two convenience units (including a Budgens), two comparison units, three retail services and five leisure services. There were no vacant units at the time of survey.

5.54 The centre is well located to cater for the needs of Waddington residents and appears to be well used. The centre is underpinned by Budgens, which is a modern purpose-built store, supplemented by a variety of smaller scale retailers and services. A medical practice is located to the south east of the junction of Grantham Road and Bar Lane.

5.55 Whilst Waddington appears to be trading well, its role is essentially local and, accordingly, we consider that it performs the function of a Local Centre.

Wragby Road/The Carlton Centre

5.56 Wragby Road is located approximately 1.5 km to the north east of Lincoln City Centre and is identified as a District Mixed-Use Centre in the saved policies of the City of Lincoln Local Plan. Our survey of the centre indicates there to be 18 units, none of which were vacant at July 2011. The centre is underpinned by the large Tesco superstore at its western end and also accommodates a further three convenience units, five comparison units, four retail services and five leisure service units. The Tesco store has appeared extremely busy at the time of WYG's visits, with the remainder of the centre benefitting from some additional footfall as a result of the activity generated.

5.57 Aside from the Tesco store, the centre is linear in nature and confined to the southern side of Wragby Road. Whilst the centre fails to provide any wider business, financial or civic services, it forms a near contiguous facility with the adjacent Carlton Centre. The Carlton Centre and its offer have been considered at Appendix 1, as one of the out of centre retail parks which complement the role of Lincoln City Centre. Our survey of the Carlton Centre indicates that, at July 2011, it had three convenience retailers (including a Co-op foodstore), eight comparison retailers (including Boots and Poundstretcher), five retail services (including Blockbuster and a post office), two leisure services, and a financial service (the Norwich & Peterborough Building Society). Whilst there were four vacant units at the time of survey, an additional two retail units were under construction.

5.58 Whilst both Wragby Road and the Carlton Centre separately provide a range of services which meet many day to day shopping needs, their geographic proximity is such that it is considered appropriate (and, indeed, advantageous) for the both to be considered a single entity with key anchors positioned at each end. Accordingly, it is recommended that Wragby Road/Carlton Centre be identified as a single District Centre.

The Future Identification of Additional Centres

5.59 It is recognised that the planned growth of Gainsborough, Lincoln and Sleaford, and the creation of Sustainable Urban Extensions (SUEs), will result in opportunities to provide additional local retail and service provision to cater for the day to day needs of communities. In considering the future potential to identify and plan for such opportunities, it will be again necessary for any designated centres to accord with the broad definitions provided by Annex B of PPS4, accepting the direction that **'Small parades of shops of purely neighbourhood significance are not regarded as centres.'**

5.60 Appropriate account has been taken of the scale of planned growth in setting out our findings in respect of the scale of future quantitative retail need. Accordingly, it may be that some of the quantitative capacity which we identify at Section 8 of this report is directed to locations which can serve the SUEs. It is envisaged that any such centres are likely to be small in scale in order to support and complement the existing town centre hierarchy. Once again, the designation of District and Local Centres should be in accordance with the accepted definitions set out above.

5.61 Whilst the appropriate scale and location for additional retail facilities to serve local needs arising from the SUEs will need to be determined with reference to location, proposed dwelling density and existing retail and service provision, we note that anticipated number of dwellings to be delivered in each SUE ranges from circa 1,600 dwellings to 6,000 dwellings. If it is to be assumed that an average of around two people will occupy each property, then the population of each SUE will be between 3,200 and 12,000 people.

5.62 In WYG's experience, Local Centres need to be supported by a catchment population of around 5,000 people and District Centres (including a food superstore) by a significantly greater population (often approaching 20,000 people). Accordingly, whilst many of the planned SUEs will be able to support a range of shops, services and facilities which could fulfil the role and function of a defined Local Centre, any need for further District Centres in particular will need to be assessed with consideration to the needs of existing residents and how these are currently being met. There may also be an additional requirement for small shops of a very local nature to be appropriately sited to serve the day to day shopping needs of a 'walk in' SUE catchment.

6.0 Household Survey

Introduction

6.01 The undertaking of original market research enables in-depth analysis at a local level and allows the evaluation of the trade draw of particular town centres. The use of specifically commissioned and tailored survey research is fundamental to identifying the likely capacity for future retail floorspace across the Study Area. Notwithstanding this, WYG acknowledges that there can be limitations to survey research, particularly with regard to the size of sample which can be achieved, and the results should therefore be taken to be a broad indication of consumer preferences.

6.02 A key requirement of this study is the detailed understanding of shopping patterns in terms of the use of Gainsborough, Lincoln, Market Rasen and Sleaford centres and the identification of the centres' catchment area. To this end, WYG commissioned specialist market researchers RMG Clarity to undertake a comprehensive household telephone survey to identify consumers' habits and preferences.

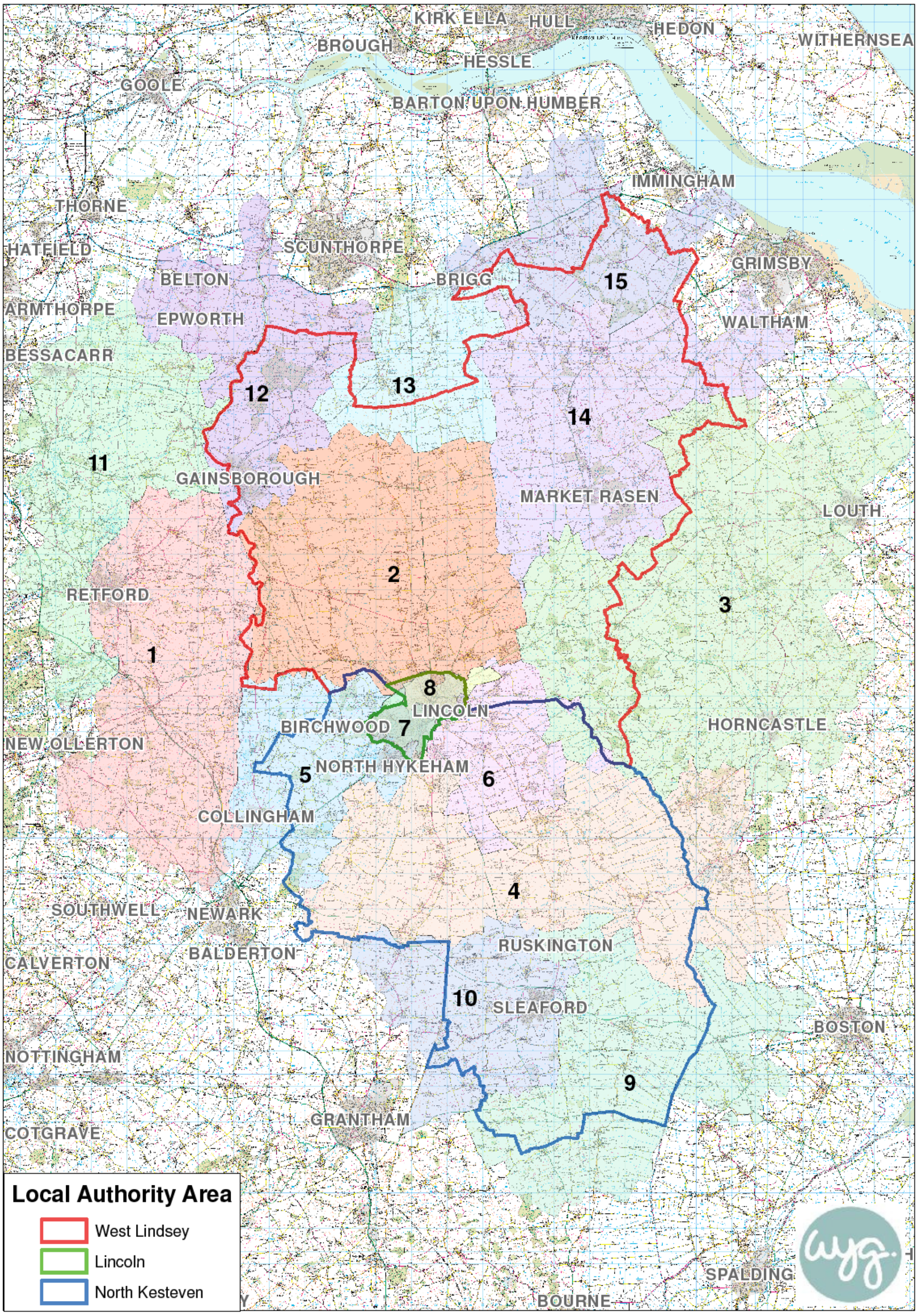
Telephone Survey

6.03 In July 2011, a survey of 1,500 households was undertaken within a defined Study Area, which has been drawn so as include the three authority areas and also adjacent areas where local residents would naturally gravitate towards conveniently located retail facilities in Lincoln, North Kesteven and West Lindsey. A map of the catchment is provided overleaf at Figure 4.1.

6.04 The defined catchment has been broken down into fifteen survey zones on a geographic basis in order to allow trends to be assessed on a local level. The zones are numbered 1 to 15 and Table 4.1 sets out the postcode sectors which define each of the zones used for the study. The authority area of the City of Lincoln broadly corresponds to Zones 7 and 8; North Kesteven broadly corresponds to Zones 4, 5, 6, 9 and 10; and, West Lindsey broadly corresponds to Zones 2, 14 and 15 (and also includes parts of Zones 3, 8, 12 and 13).

6.05 The questions and full tabulation of results from the household survey are provided at Appendices 3 and 4.

Figure 6.1: Study Area and Zones



Copyright 2011 Experian Ltd & NAVTEQ 2011 - Based upon Crown Copyright Material

Table 6.1: Post Codes by Survey Zone

Survey Zone	Post Code Sectors
Zone 1	DN22 0, DN22 6, DN22 7, DN22 9, NG22 0, NG23 6
Zone 2	DN21 5, LN1 2, LN2 2, LN2 3, LN8 2
Zone 3	LN3 5, LN8 5, LN8 6, LN9 5, LN9 6, LN10 5, LN11 0, LN11 9
Zone 4	LN4 3, LN4 4, LN5 0, LN5 9, LN10 6
Zone 5	LN6 3, LN6 4, LN6 5, LN6 8, LN6 9, NG23 7
Zone 6	LN3 4, LN4 1, LN4 2
Zone 7	LN5 7, LN5 8, LN6 0, LN6 7
Zone 8	LN1 1, LN1 3, LN2 1, LN2 4, LN2 5
Zone 9	NG34 0, NG34 9, PE20 3
Zone 10	NG32 3, NG34 7, NG34 8
Zone 11	DN9 2, DN9 3, DN10 4, DN10 5, DN10 6, DN22 8
Zone 12	DN9 1, DN17 3, DN21 1, DN21 2, DN21 3
Zone 13	DN20 9, DN21 4
Zone 14	DN37 0, LN7 6, LN8 3
Zone 15	DN20 8, DN37 8, DN38 6, DN39 6, DN41 8

6.06 The results of the household survey are utilised in calculating the expenditure claimed by each of existing retail facility within the Study Area, a process which is considered in Section 8 of this report.

6.07 The household survey is also of assistance in identifying broad shopping patterns, including the frequency of visit, the incidence of linked trips, the most popular means of accessing town centre facilities, the use of other town centre facilities, and so on.

Food Shopping Patterns

6.08 Table 6.2 below indicates that convenience stores within the catchment area claim a market share of 71.5% of all main food shopping trips which derive from inside the catchment. In terms of 'top-up' food shopping, Table 6.3 indicates that a greater market share of 85.8% is claimed by stores located within the catchment.

6.09 As would be expected, both of the tables indicates that the retention of convenience goods expenditure is greatest in the 'core' zones around Lincoln at the centre of the catchment, where easy accessibility is offered to a range of shopping facilities. In particular, facilities within the catchment claim a market share of more than 90% of main food shopping trips which originate from Zones 2, 6, 7 and 8.

6.10 The zones with the lowest market share are those at the periphery of the catchment which are in relatively close proximity to competing facilities nearby. This leakage of trips is particularly evident at Zones 13 and 15, both of which provide a catchment main food shopping market share of less than 50%, with significant numbers of journeys instead being directed to Scunthorpe, Immingham, Grimsby and other conveniently located centres.

Table 6.2: Main Food Shopping Trips Analysis by Zone (%)

Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Market Share	81.0	96.0	80.0	71.0	88.0	95.0	94.0	95.1	59.0	72.0	49.0	52.0	41.6	53.5	46.0	71.5

Table 6.3: 'Top-Up' Food Shopping Trips Analysis by Zone (%)

Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Market Share	78.9	95.5	88.1	95.5	89.9	96.1	97.1	96.1	83.1	85.9	77.0	86.8	67.6	81.7	64.8	85.8

Non-Food Shopping Patterns

6.11 As would be expected, shopping destinations within the defined catchment secure a lesser market share for trips to purchase most categories of comparison goods when compared with convenience goods shopping. As set below in Table 6.4 and 6.5, across the catchment as a whole, 60% or more of all shopping trips which derive from within the catchment are retained within the catchment for three categories of comparison goods, these being 'Chemist Goods', 'DIY and Gardening Goods' and 'Furniture Goods'. Once again, the greatest proportion of trips which are retained within the catchment derived from the central Zones 2, 6, 7 and 8, which is to be expected and corresponds with sustainable development principles.

Table 6.4: Non-Bulky Non-Food Shopping Market Share Analysis by Zone (%)

Type of Good	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Clothes Market Share	54.1	80.6	50.5	67.4	74.5	93.5	88.5	83.7	40.0	57.7	23.4	44.1	30.6	36.8	13.4	55.9
Books, CDs, DVDs Market Share	50.7	79.7	43.8	46.1	55.3	71.2	68.1	65.8	33.3	54.8	27.5	40.6	31.5	30.3	21.7	48.4
Small H'hold Goods Market Share	50.7	76.7	71.2	60.9	74.6	88.3	89.6	88.9	34.9	53.6	22.6	37.3	37.7	33.3	23.1	56.4
Toys, Games, etc Market Share	47.1	66.7	63.9	73.6	67.4	84.0	80.4	83.3	44.0	53.3	19.2	43.2	17.0	26.4	12.2	52.2
Chemist Goods Market Share	80.0	92.6	85.4	89.5	89.5	94.8	96.8	97.9	65.9	83.7	50.5	69.1	59.3	68.4	54.7	78.6

Table 6.5: Bulky Non-Food Shopping Market Share Analysis by Zone (%)

Type of Good	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Electrical Market Share	43.0	81.4	67.1	50.6	74.7	85.6	91.9	69.7	36.0	48.9	18.6	33.3	25.8	44.8	23.4	52.9
DIY/ Gardening Market Share	53.8	91.5	75.0	74.1	81.2	88.0	89.7	90.5	56.8	77.4	33.3	44.8	43.4	47.6	52.4	66.9
Furniture Goods Market Share	56.0	84.1	75.3	64.8	75.6	90.8	90.0	89.9	42.4	60.6	35.9	54.4	52.8	31.5	39.2	62.3

Leisure Patterns

6.12 In addition to assessing shopping patterns, the results of the household survey can also be used to assess the use of leisure facilities within the seven categories of 'indoor sports and fitness', 'cinema', 'bars, pubs and nightclubs', 'restaurants', 'ten-pin bowling', 'bingo' and 'theatres, galleries and museums'.

6.13 As would be expected, the Study Area and, in particular, the centres of Gainsborough, Lincoln, Market Rasen and Sleaford provide for the principal leisure needs of most residents in most of the zones. Across the whole Study Area, around four out of five trips to indoor sports facilities, to bars, clubs and nightclubs, and to restaurants are retained within the Study Area. Indeed, the survey indicates that very few leisure trips to these types of facility, which originate in the zones which surround Lincoln (Zones 2, 4, 5, 6 7 and 8), are taken to destinations outside of the Study Area.

6.14 Whilst residents of these central zones also undertake the large majority of trips to cinemas, to ten pin bowling and to bingo within the Study Area (and, in particular, to facilities in Lincoln), in outlying areas conveniently located facilities in Scunthorpe and Doncaster also act to meet residents' needs. More specifically, the Vue cinema in Scunthorpe is the second most popular cinema with residents of the Study Area (attracting 13.4% of trips, somewhat less than the 42.2% of trips claimed by the Lincoln Odeon at Brayford Wharf) and the Gala Bingo at Scunthorpe is the second most popular bingo hall (attracting 16.1% of trips, compared to the 21.0% claimed by the Gala Bingo at the Waterside Centre in Lincoln). With regard to ten pin bowling, the most popular destinations are the Lincoln Bowl and Superbowl in Lincoln (which attract 30.3% and 15.7% of such trips respectively) followed then by the Superbowl and AMF Bowling in Doncaster (which attract 9.6% and 7.6% of such trips).

6.15 A more modest proportion of trips to theatres, galleries and museums is retained within the Study Area, which is a consequence of such trips generally being occasional and consider by many to merit a journey further afield to destinations such as London, Nottingham or York. Given the infrequent nature of such visits and the fact that they may sometimes be combined with a weekend away, it is not considered that the loss of such trips is reflective of there being a particular and significant weakness in the Study Area's cultural offer.

Table 6.6: Leisure Service Market Share Analysis by Zone (%)

Type of Leisure Service	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Indoor Sports and Fitness	77.3	95.8	88.9	95.7	96.2	95.2	100	95.0	81.5	89.5	68.2	69.6	74.1	63.6	60.0	83.1
Cinema	34.2	85.0	78.9	94.9	90.0	100	93.9	100	53.8	79.4	5.7	23.5	7.9	31.3	2.9	60.4
Bars, Pubs and Nightclubs	91.9	96.6	95.7	90.0	93.1	100	100	93.9	78.1	96.8	66.7	76.5	80.6	69.0	64.7	85.9
Restaurants	73.7	100	88.5	93.3	87.2	98.1	98.0	96.5	78.0	80.0	53.2	51.0	64.8	52.4	40.8	77.7
Ten-Pin Bowling	30.0	94.1	45.5	92.9	91.7	100	95.0	100	41.7	66.7	0.0	7.7	9.1	25.0	0.0	55.1
Bingo	0.0	66.7	50.0	66.7	100	100	100	100	60.0	66.7	33.3	50.0	33.3	0.0	0.0	57.6
Theatres, Galleries and Museums	48.4	64.0	50.0	71.9	72.7	81.6	60.7	81.3	44.4	47.2	11.1	41.7	23.3	32.3	20.0	50.6

6.16 The full tabulation of results from the household survey are provided at Appendix 4. Further commentary on the key trends and patterns of consumer behaviour is provided below.

Key Shopper Trends

Main Food Shopping

- The household survey indicates that six stores cumulatively attract almost one third of the overall main food shopping market share, these being: Morrisons at Tritton Road, Lincoln (6.4%); Tesco Extra at Wragby Road, Lincoln (6.0%); Sainsbury's at Tritton Road, Lincoln (5.3%); Asda at Newark Road, North Hykeham (5.0%); Tesco at Northgate, Sleaford (4.9%); and, Tesco at Barnard Avenue, Brigg (4.1%).
- More than a third of those surveyed (34.1%) indicated that the principal reason for choosing their main food shopping destination was its proximity to their home, followed by the fact that the store offers low prices (8.4%) and then due to habit or loyalty to the retailer (8.2%).
- A majority of shoppers (60.3%) do their main food shop at least once a week, with 11.9% undertaking it at least twice weekly and 14.0% undertaking it at least once a fortnight.
- Just 3.8% of respondents suggested that their last main food shop was undertaken via the internet.
- A large majority of respondents use the car in travelling to do their main food shop (86.8%), with the next most popular means of transport being by foot (7.2%) and then by bus (3.5%).
- More than half of respondents (54.6%) do not link their main food shopping trip with any other activity, with the most popular activities of those that do being non-food shopping (21.9%) and accessing services such as banks and other financial institutions (10.3%).

Top Up Food Shopping

- Given the wide geographical spread of the catchment, a large number of stores have been identified as attracting top up food shopping expenditure. The most popular destinations for such shopping identified by the survey comprise: Tesco at Barnard Avenue, Brigg (3.3%); Tesco at Northgate, Sleaford (2.4%); Co-op at Clarence Road, Woodhall Spa (2.4%); Budgens at Tattershall Road, Woodhall Spa (2.3%); Sainsbury's at Tritton Road, Lincoln (2.3%); and, Co-op at High Street, Lincoln (2.2%).
- As would be expected, the household survey indicates that top up shopping trips tend to be undertaken on a more frequent basis than main food shopping trips, with 7.3% of respondents undertaking such shopping trips on a daily basis, 38.8% at least twice weekly, 34.0% at least weekly and 6.8% at least fortnightly.
- In considering food shopping patterns, it is relevant to note that a Tesco Express store opened at Bracebridge Heath on 19 August 2011, shortly after the undertaking of the household survey. Accordingly, its influence – which will be very limited given its size – is not recorded by the survey.

Non-Food Shopping

- Lincoln City Centre (including adjacent retail parks) is the most popular retail destination for clothing and footwear (with 40.5% of respondents indicating that this was the destination for their last shopping trip for such goods); for small household items (32.3%); for toys, games, bicycles and recreation goods (31.2%); for chemist goods (17.3%); for electrical items (19.1%); and for furniture, carpets and floor coverings (23.7%).
- The goods types for which Lincoln City Centre is not respondents' most popular retail destination are books, CD and DVDs (with internet purchases securing 30.6% of such expenditure) and DIY goods (with the B&Q at Tritton Road, Lincoln securing 15.9% of such trips).

Internet Shopping

- Of those surveyed, more than half (52.8%) make use of internet or TV shopping.
- The most popular types of items to be purchased via electronic home shopping are CDs and DVDs (with 27.1% of respondents purchasing the item in this manner), books (26.9%), clothing (20.9%) and then major electrical items (16.9%).

Leisure

- In terms of indoor sports or fitness activities, the two most frequently visited facilities identified by name are Yarborough Leisure Centre (comprising 4.5% of respondents' visits) and Sleaford Leisure Centre (4.2%).
- Unsurprisingly, the Odeon at Brayford Wharf in Lincoln is by far the most popular cinema for the Study Area population, with 42.2% of respondents stating that this was the location for most of their cinema visits. The second most popular cinema is the Kinema in the Woods at Woodhall Spa, with 14.2% of respondents suggesting that this is their preferred destination to watch a film, followed then by the Vue Cinema in Scunthorpe, which attracts 13.4% of such trips.
- Lincoln City Centre was identified as by far the most popular destination for visits to bars, pubs and nightclubs, and for visits to restaurants, with 24.1% and 29.1% of respondents respectively indicating that the centre was their usual destination for such activities. The next most popular destination was Sleaford, which was the preferred location for 6.5% of respondents visiting bars, pubs and nightclubs, and for 5.8% of respondents visiting restaurants.
- Lincoln Bowl at Washingborough Road and Superbowl off Tritton Road are the most popular venues for ten pin bowling, attracting 30.3% and 15.7% of such trips originating from within the Study Area respectively. The next most popular facility is Superbowl in Doncaster which attracts 9.6% of such visits.
- Two bingo halls together attract more than one third of all such trips originating from within the Study Area, these being Gala Bingo at the Waterside Centre in Lincoln (21.0% of trips) and Gala Bingo at Brigg Road in Scunthorpe (16.1%). No further bingo hall or club attracts more than 5.0% of such trips.
- The Theatre Royal in Lincoln is the single most popular venue for art or cultural visits, with 21.5% stating that this is the venue that they visit most often for such purposes.

7.0 Population and Expenditure

Introduction

7.01 This section of the report assesses the current population and expenditure generated (both convenience and comparison goods) within the defined catchment area.

Study Area Population

7.02 Two different population growth scenarios have been utilised in modelling the potential future need for additional retail provision within the Study Area.

‘Scenario A’ Population

7.03 ‘Scenario A’ utilises Experian Micromarketer G3 data to determine the population within each postal code sector zone (2010 estimate). The baseline population has then been projected forward based on population projections identified by Experian (derived from mid-year ONS based population estimates for each survey zone), which have then been revised by Experian to take into account anticipated future housing growth.

7.04 Population figures are provided for each of the 15 survey zones. For the purpose of this study, population and expenditure has been calculated at five-year intervals to 2031 (i.e. 2011, 2016, 2021, 2026 and 2031[22]).

7.05 On this basis, the identified Study Area is estimated to contain a resident population of 464,391 people in 2011, rising to 479,890 people by 2016, to 496,540 people by 2021, to 513,604 people by 2026, and to 528,511 people by 2031. This represents an increase in population within the Study Area of 64,120 people (or 13.8%) between 2011 and 2031.

7.06 Table 7.1 provides a detailed breakdown of the forecast ‘Scenario A’ population change within each survey zone in the period through to 2031.

---

[22] Experian population data extends to 2030 only and it assumed that population growth for each zone at 2031 replicates the pro-rata growth forecasted by Experian at 2030.

Table 7.1: 'Scenario A' Population by Survey Zone (2011 to 2031)

Zone	2011	2016	2021	2026	2031
1.	41,430	42,246	43,248	44,207	44,948
2.	36,532	38,192	39,871	41,427	42,673
3.	35,698	37,573	39,683	41,812	43,628
4.	42,045	44,203	46,348	48,448	50,351
5.	34,756	35,741	36,786	37,827	38,668
6.	25,053	25,965	27,033	28,054	28,879
7.	39,757	40,304	40,790	41,867	43,017
8.	37,685	38,057	38,465	39,343	40,412
9.	21,424	22,168	22,788	23,416	23,940
10.	28,936	30,446	32,061	33,617	35,026
11.	28,690	28,910	29,334	29,695	29,908
12.	42,829	45,017	47,449	49,786	51,816
13.	10,714	11,119	11,469	11,796	12,074
14.	22,556	23,186	23,859	24,454	24,943
15.	16,286	16,763	17,356	17,855	18,226
Total	**464,391**	**479,890**	**496,540**	**513,604**	**528,511**

Source: Experian Micromarketer G3 data

'Scenario B' Population

7.07 The 'Scenario B' population model seeks to reflect the level of growth proposed by the RSS, which the three authorities remain committed to (albeit it is accepted that the growth identified represents an ambitious target, given the difficult current housing market conditions). A methodology note, setting out our detailed assumptions in calculating the assumed increases in Study Area population as a result of pursuing the level of growth originally identified in the RSS is provided at Appendix 5.

7.08 As indicated by Table 7.2, under growth 'Scenario B' the identified Study Area is estimated to contain a resident population of 465,284 people at 2011, rising to 487,995 people by 2016, to 512,042 people by 2021, to 537,516 people by 2026, and to 564,511 people by 2031. This equates to a significantly greater increase in the Study Area population of 99,227 people (a 21.3% increase) between 2011 and 2031.

Table 7.2: 'Scenario B' Population by Survey Zone (2011 to 2031)

Zone	2011	2016	2021	2026	2031
1.	41,555	42,378	43,218	44,075	44,948
2.	36,498	38,115	39,803	41,566	43,407
3.	35,749	37,574	39,493	41,509	43,628
4.	42,073	44,193	46,420	48,759	51,217
5.	34,744	35,838	36,967	38,131	39,333
6.	25,079	27,019	29,108	31,360	33,785
7.	40,066	42,481	45,042	47,757	50,636
8.	37,910	40,100	42,416	44,866	47,457
9.	21,436	22,131	22,848	23,588	24,352
10.	29,138	31,530	34,118	36,918	39,948
11.	28,559	28,890	29,226	29,565	29,908
12.	42,995	46,713	50,751	55,139	59,907
13.	10,679	11,012	11,355	11,709	12,074
14.	22,584	23,251	23,937	24,644	25,371
15.	16,218	16,770	17,340	17,930	18,539
Total	**465,284**	**487,995**	**512,042**	**537,516**	**564,511**

Retail Expenditure

7.09 In order to calculate convenience and comparison expenditure per person, WYG has again utilised Experian Micromarketer G3 data, which provides detailed information on local consumer expenditure that takes into account the socio-economic characteristics of the local population. Experian is a widely accepted source of expenditure and population data and is regularly used by WYG and by other consultants in retail studies of this type.

7.10 The base year for the Experian expenditure data is 2010. Per capita growth forecasts have been derived from Figure 1a of Experian Retail Planner Briefing Note 9, which was published in September 2011. For the purposes of this study, the following annual growth forecasts have been applied (Experian forecasts expenditure growth to 2028 only and, for the three years which follow to 2031, it has been assumed that the estimated growth rate at 2028 will continue).

Table 7.3: Experian Per Capita Expenditure Growth Forecasts

Year	Convenience	Comparison
2011	-0.3%	+0.5%
2012	-0.4%	+1.6%
2013	+0.5%	+2.1%
2014 to 18	+0.5% per annum	+3.0% per annum
2019 to 31	+0.6% per annum	+3.0% per annum

Source: Retail Planner Briefing Note 9 (September 2011)

7.11 The latest growth forecasts suggest that the current downturn in the economy will continue to impact upon future expenditure, at least in the short term. The Experian expenditure growth forecasts are particularly circumspect for convenience goods, with negative growth anticipated in 2011 and 2012, before modest growth of 0.5% per annum is forecast between 2013 and 2018, and then 0.6% per annum between 2019 and 2028. Over the medium to long term it is expected that the forecast levels of growth will increase as the economy recovers to levels broadly commensurate with those identified prior to the recession. However, WYG considers that the growth in expenditure forecast in the longer term (beyond the next ten years) should be treated with caution given the inherent uncertainties in predicting the economy's performance over time.

7.12 Experian Retail Planner Briefing Note 9 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) over the Study period. 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 (particularly in the case of convenience goods). Accordingly, expenditure committed in this manner acts to support stores and should be considered 'available' to tangible retail destinations. Appendix 3 of Retail Planner Briefing Note 9 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.'

7.13 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 (set out below at Table 7.4). The proportion of expenditure committed through special forms of trading cited below is 'stripped out' of the expenditure identified as potentially being available to the Study Area.

Table 7.4: Special Forms of Trading Forecasts

Year	Convenience	Comparison
2011	4.2%	10.0%
2016	5.9%	12.7%
2021	6.3%	12.4%
2026	6.8%	12.1%
2031	7.0%	12.0%

Source: Retail Planner Briefing Note 9 (September 2011)

7.14 Using the above growth rates and special forms of trading allowances, it is possible to produce expenditure estimates for each survey zone under each population growth scenario at 2011, 2016, 2021, 2026 and 2031. In doing so, our assessment takes into account both per capita retail expenditure growth and population change.

Convenience Goods Expenditure

7.15 Under population growth 'Scenario A', it is estimated that, in 2011, the resident population of the catchment generates some £857.78m of convenience goods expenditure (at 2010 prices and excluding special forms of trading). This is forecast to increase to £1051.40m by 2031, which represents an increase of £193.61m (or 22.6%) between 2011 and 2031.

Table 7.5: 'Scenario A' Total Available Expenditure – Convenience (£m)

2011	2016	2021	2026	2031	Growth 2011-2016	Growth 2011-2021	Growth 2011-2026	Growth 2011-2031
857.78	884.79	937.52	993.85	1051.40	27.00	79.74	136.07	193.61

7.16 Greater expenditure growth is anticipated under 'Scenario B', with the estimated resident population generating £859.38m of convenience goods expenditure at 2011. Convenience goods expenditure is then forecast to increase to £1120.92m at 2031, which represents an increase of £261.54m (or 30.4%) between 2011 and 2031.

Table 7.6: 'Scenario B' Total Available Expenditure – Convenience (£m)

2011	2016	2021	2026	2031	Growth 2011-2016	Growth 2011-2021	Growth 2011-2026	Growth 2011-2031
859.38	899.19	965.69	1038.52	1120.92	39.81	106.32	179.14	261.54

Main Food and 'Top-Up' Shopping

7.17 For the purposes of this study, the proportion of convenience goods expenditure directed to respondents' main food shopping destination has been derived directly from a specific question in the household survey and has been applied on a zone by zone basis. The survey indicates that, across the Study Area, approximately 73.5% of expenditure is directed to the main food shopping destination (bulk food shop) and approximately 26.5% is directed to 'top up' shopping destinations (i.e. regular day-to-day purchases, such as milk, bread, and so on)[23]. This is broadly reflective of the traditional 'broad brush' assumption that around 75% of expenditure is committed through main food shopping trips and around 25% through 'top-up' spending.

7.18 By applying these expenditure estimates to the identified resident population of the Study Area, convenience goods expenditure on main food shopping under population growth 'Scenario A' at 2011 is estimated to be £630.79m and 'top up' expenditure £226.99m. Under 'Scenario B', expenditure on main food shopping at 2011 is estimated to be £631.95m and 'top up' expenditure £227.42m.

Comparison Goods Expenditure

7.19 Under population growth 'Scenario A', the resident population within the Study Area is identified as generating £1,125.58m of comparison goods expenditure at 2011 (again in 2010 prices and excluding expenditure committed via special forms of trading). Given the forecast growth in population and expenditure, this is expected to increase to £2,219.83m by 2031. This represents an increase of £1,094.25m (or 97.2%) between 2011 and 2031. This is clearly a very significant increase and is a result of the forecast increase in catchment population and, in particular, the forecast level of comparison goods expenditure growth over forthcoming years.

Table 7.7: 'Scenario A' Total Available Expenditure – Comparison (£m)

2011	2016	2021	2026	2031	Growth 2011-2016	Growth 2011-2021	Growth 2011-2026	Growth 2011-2031
1,125.58	1,279.15	1,539.97	1,852.80	2,219.83	153.57	414.39	727.22	1,094.25

7.20 Using population growth 'Scenario B', it is estimated that the Study Area population will generate £1,127.56m of comparison goods expenditure at 2011 (again, excluding special forms of trading), which is forecast to rise to £2,364.58m at 2031. This represents an increase of £1,237.02m (or 109.7%) over the twenty years to 2031.

[23] Derived from responses to Question 14 of the Household Survey, based on the Study Area average calculated using the mid-point in the range of each response (e.g. if a respondent stated that between 50% and 75% of their food spend was undertaken through a 'main food' shop, we have assumed that 62.5% of expenditure was committed in such a manner).

Table 7.8: 'Scenario B' Total Available Expenditure – Comparison (£m)

2011	2016	2021	2026	2031	Growth 2011-2016	Growth 2011-2021	Growth 2011-2026	Growth 2011-2031
1,127.56	1,299.48	1,585.16	1,934.51	2,364.58	171.92	457.60	806.95	1,237.02

7.21 For the purposes of this study, comparison goods expenditure has been divided into eight sub-categories: 'Furniture', 'DIY and Gardening Goods' and 'Electrical' (collectively referred to as bulky goods), and 'Clothing & Footwear', 'Books, CDs, DVDs, etc', 'Household Goods', 'Toys, Bicycles and Other Recreational Goods' and 'Chemist Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by MapInfo on a zone by zone basis. However, across the Study Area, the expenditure directed to each sub-category by residents within the Study Area is as follows.

Bulky Goods

'Furniture' – 8.7%

'DIY and Gardening Goods' – 9.5%

'Electrical' – 12.9%

Sub-Total – 31.1%

Non-Bulky Goods

'Clothing & Footwear' – 25.5%

'Books, CDs, DVDs, etc.' – 7.9%

'Household Goods' – 6.9%

'Toys, Bicycles and Other Recreation Goods' – 14.8%

'Chemist Goods' – 13.9%

Sub-Total – 68.9%

Market Share of Expenditure of the Four Main Town Centres

7.22 Having calculated the likely levels of expenditure which are generated by the application of the two population growth scenarios, it is necessary to identify the 'sphere of influence' of each of the main centres and each centre's claimed market share of available expenditure. In order to do this in a meaningful way, it is advantageous to focus the analysis of market share on those zones which immediately surround each particular centre. For Gainsborough, the zones of greatest relevance are Zones 2, 11 and 12; for Lincoln, Zones 2, 4, 5, 6, 7 and 8; for Market Rasen, Zone 14; and, for Sleaford, Zones 9 and 10. The population and expenditure derived from each of these main centre catchments under Scenario A is set out below at Table 7.9.

Table 7.9 Main Centre Catchment Population and Expenditure at 2011

Centre	Population	Convenience Goods Expenditure (£m)	Comparison Goods Expenditure (£m)
Gainsborough	108,051	199.34	268.16
Lincoln	215,828	396.05	511.92
Market Rasen	22,556	42.10	55.74
Sleaford	50,360	94.35	125.13

7.23 As previously highlighted, this study has involved the completion of 1,500 household telephone interviews within the defined Study Area. By analysing the results from the survey, it is possible to estimate the levels of expenditure which are directed towards each main town centre's shopping facilities. The market shares for the various expenditure categories are highlighted below in Tables 7.10 to 7.17 and have been calculated by applying available expenditure at 2011 under population growth 'Scenario A'. Any variation which would occur through the application of available expenditure at 2011 under 'Scenario B' is negligible and, in order to allow for a clear and straightforward analysis, we have determined market share under one growth scenario only.

Gainsborough

7.24 Table 7.10 indicates that shopping destinations within and around Gainsborough Town Centre account for 35.4% of main food shopping expenditure generated by residents of Zones 2, 11 and 12. In terms of 'top-up' convenience shopping, existing facilities at Gainsborough attract around 28.2% of expenditure generated within the same three zones. Whilst Gainsborough's market share of convenience goods expenditure would appear modest, it should be noted that the three zones assessed are relatively large and include areas where residents may naturally gravitate towards alternative convenience goods facilities at Lincoln, Retford and Scunthorpe. In monetary terms, £59.2m of the £199.3m of convenience goods expenditure which is generated within the Zones 2, 11 and 12 under growth 'Scenario A' is spent in Gainsborough.

7.25 In terms of comparison goods expenditure, Table 7.11 indicates that Gainsborough, notwithstanding recent improvements in its comparison goods offer, secures a particularly low market share of clothing and footwear, household goods, toys and electrical items expenditure, attracting less than one in every five pounds spent on each of these goods types.

Table 7.10: Gainsborough's Current Market Share – Convenience (2011)

Zone	Market Share (%)		
	Main Convenience	'Top-Up' Convenience	Total^
2	30.9	13.6	26.2
11	23.2	10.8	20.2
12	47.9	55.9	49.8
Total	**35.4**	**28.2**	**29.7**

Source: Derived from Expenditure Tables provided at Appendix 6
^ Based on cumulative market share of main and 'top-up' food shopping
Based on market share of expenditure

Table 7.11: Gainsborough's Current Market Share – Comparison (2011)

Zone	Market Share (%)								
	Clothing & Footwear	Books, CDs, etc.	Household Goods	Toys, etc.	Chemist	Electrical	Furniture	DIY	Total
2	10.7	18.5	7.4	5.6	24.2	12.5	19.7	17.5	13.9
11	8.8	10.9	8.6	9.5	13.4	11.6	15.8	11.3	10.9
12	29.2	51.1	27.0	35.9	49.5	27.8	41.6	36.9	36.2
Total	**18.0**	**30.2**	**15.7**	**18.6**	**30.5**	**18.0**	**26.7**	**22.9**	**21.3**

Source: Derived from Expenditure Tables provided at Appendix 6
Based on market share of expenditure

Lincoln

7.26 Lincoln's influence is such that it performs relatively well across six different zones and particularly strongly across three (Zones 6, 7 and 8). In terms of convenience goods, Table 7.12 indicates destinations within and around Lincoln City Centre achieve a market share of very nearly three quarters or more of all expenditure in Zones 6, 7 and 8 (achieving a greater than 90% market share in Zone 8). As would be expected, in terms of convenience goods expenditure, Lincoln functions primarily as a main food shopping destination, with the exception of Zones 7 and 8 where it also acts as a local destination for 'top-up' food shopping.

7.27 Table 7.13 indicates a similarly strong performance in terms of the centre's capture of comparison goods expenditure, with the centre appearing to have a particularly attractive offer in terms of its clothing and footwear provision, household goods, and toys and games (with each of these categories attracting more than three quarters of expenditure across the six zones). The market share claimed by Lincoln of expenditure generated within the central Zones 7 and 8 is particularly healthy, demonstrating the wide range and choice of goods available within the centre. In this regard, we note that, for comparison goods expenditure as a whole. Lincoln claims more than nine of every ten pounds spent on comparison goods in Zones 7 and 8.

Table 7.12: Lincoln's Current Market Share – Convenience (2011)

Zone	Market Share (%)		
	Main Convenience	'Top-Up' Convenience	Total^
2	58.8	36.4	52.6
4	18.9	3.4	14.7
5	48.0	31.6	44.0
6	89.5	36.8	74.8
7	74.7	75.4	74.9
8	91.8	88.3	90.8
Total	**60.9**	**44.9**	**56.6**

Source: Derived from Expenditure Tables provided at Appendix 6
^ Based on cumulative market share of main and 'top-up' food shopping
Based on market share of expenditure

Table 7.13: Lincoln's Current Market Share – Comparison (2011)

Zone	Market Share (%)								
	Clothing & Footwear	Books, CDs, etc.	Household Goods	Toys, etc.	Chemist	Electrical	Furniture	DIY	Total
2	78.6	72.3	75.9	80.6	47.3	75.0	68.2	58.8	70.6
4	62.5	45.3	57.4	76.1	8.6	30.6	35.3	28.2	45.6
5	73.3	63.8	71.4	85.3	51.6	75.0	74.3	78.3	71.9
6	92.4	94.3	86.2	90.7	65.9	83.5	85.9	84.1	85.8
7	90.9	88.0	90.5	93.0	84.2	91.5	92.5	89.6	90.2
8	87.1	90.6	89.7	97.8	92.7	82.4	89.6	92.5	91.3
Total	**79.7**	**73.4**	**76.0**	**86.4**	**55.8**	**72.9**	**72.3**	**69.6**	**74.2**

Source: Derived from Expenditure Tables provided at Appendix 6
Based on market share of expenditure

Market Rasen

7.28 Market Rasen has a more localised role than the other three main centres, with its influence being mainly limited to Zone 14 (it fails to attract more than 5% of the market share of convenience goods expenditure from any other zone). Table 7.14 identifies that the single dominant convenience goods store in Market Rasen is the Tesco store at Linwood Road, which attracts 26.8% of main food and 14.1% of 'top-up' food expenditure which originates from Zone 14. Market Rasen as a whole attracts 32.5% of all convenience goods expenditure originating from Zone 14.

7.29 Table 7.15 indicates that Market Rasen's comparison goods provision attracts only a very limited proportion of such expenditure originating from Zone 14. Indeed, for goods categories such as clothing and footwear, household goods, toys and games, and furniture, the centre attracts less than 10% of such expenditure from Zone 14. Two comparison goods categories perform significantly more strongly than the remainder – attracting around a third of available expenditure in the zone – these being chemist goods (many of which would typically be picked up as part of a food shopping trip) and electrical goods (which is a likely consequence of there being a well established specialist electrical goods shop in the centre).

Table 7.14: Market Rasen's Current Market Share – Convenience (2011)

Zone	Market Share (%)		
	Main Convenience	'Top-Up' Convenience	Total^
14	32.0	33.8	32.5
Total	**32.0**	**33.8**	**32.5**

Source: Derived from Expenditure Tables provided at Appendix 6
^ Based on cumulative market share of main and 'top-up' food shopping
Based on market share of expenditure

Table 7.15: Market Rasen's Current Market Share – Comparison (2011)

Zone	Market Share (%)								
	Clothing & Footwear	Books, CDs, etc.	Household Goods	Toys, etc.	Chemist	Electrical	Furniture	DIY	Total
14	2.2	16.1	6.6	6.5	33.3	36.0	5.8	13.4	14.3
Total	**2.2**	**16.1**	**6.6**	**6.5**	**33.3**	**36.0**	**5.8**	**13.4**	**14.3**

Source: Derived from Expenditure Tables provided at Appendix 6
Based on market share of expenditure

Sleaford

7.30 Sleaford secures a reasonably strong market share of convenience goods expenditure generated from within Zone 10 (containing Sleaford itself) and also significant expenditure from Zone 9 (which is adjacent to Sealford, but which also affords good accessibility to Boston). In Zone 10, 69.1% of main food spending and 64.1% of 'top-up' spending is directed to Sleaford Town Centre. In Zone 9, the market share of main food shopping expenditure directed towards Sleaford is 48.0% and for 'top-up' food expenditure it is 28.6%.

7.31 Sleaford's market share of comparison goods expenditure is more modest, with only two goods categories – chemist goods (72.2%) and DIY goods (56.8%) – attracting more than half of such expenditure generated in Zone 10. Sleaford's overall market share of comparison goods expenditure which is generated within Zone 10 is 34.3%. Once again, the centre attracts a more limited market share of comparison goods expenditure from Zone 9, equating to 20.0% across all eight comparison goods categories. Comparison goods expenditure which 'leaks' from Zones 9 and 10 to other destinations is principally spent at Lincoln, Grantham and Boston.

Table 7.16: Sleaford's Current Market Share – Convenience (2011)

Zone	Market Share (%)		
	Main Convenience	'Top-Up' Convenience	Total^
9	48.0	28.6	43.3
10	69.1	64.1	67.8
Total	**59.8**	**49.3**	**57.1**

Source: Derived from Expenditure Tables provided at Appendix 6
^ Based on cumulative market share of main and 'top-up' food shopping
Based on market share of expenditure

Table 7.17: Sleaford's Current Market Share – Comparison (2011)

Zone	Market Share (%)								
	Clothing & Footwear	Books, CDs, etc.	Household Goods	Toys, etc.	Chemist	Electrical	Furniture	DIY	Total
9	7.9	29.3	16.4	11.8	36.8	13.9	24.6	40.3	20.0
10	17.0	43.1	26.2	19.4	72.2	27.4	34.8	56.8	34.3
Total	**13.2**	**37.3**	**22.1**	**16.2**	**57.3**	**21.7**	**30.5**	**50.0**	**28.3**

Source: Derived from Expenditure Tables provided at Appendix 6
Based on market share of expenditure

Study Area Market Share

7.32 Table 7.18 indicates the proportion of convenience goods expenditure generated within each zone which is spent within the Study Area. This retention rate varies significantly from zone to zone, with just 49.8% of convenience goods expenditure generated from within Zone 13 being spent within the Study Area, rising to 98.9% of convenience goods expenditure from within Zone 6 remaining in the Study Area. Across all of the zones, more than four out of every five pounds (80.5%) spent on convenience goods items is directed to retail destinations within the Study Area. Given the proximity of alternative retail destinations at the periphery of the Study Area, this is considered to be a healthy market share.

Table 7.18: Study Area Current Market Share – Convenience (2011)

Zone	Market Share (%)		
	Main Convenience	'Top-Up' Convenience	Total^
1.	82.7	78.9	81.7
2.	99.0	97.0	98.4
3.	81.6	90.8	84.4
4.	74.7	95.5	80.4
5.	89.8	89.9	89.8
6.	100.0	96.1	98.9
7.	98.9	97.1	98.5
8.	99.0	96.1	98.2
9.	60.2	83.1	65.7
10.	76.6	85.9	79.0
11.	51.6	77.0	57.6
12.	54.2	86.8	61.9
13.	43.3	67.6	49.8
14.	55.7	81.7	62.6
15.	47.9	64.8	52.3
Total	**77.7**	**88.3**	**80.5**

Source: Derived from Expenditure Tables provided at Appendix 6
^ Based on cumulative market share of main and 'top-up' food shopping
Based on market share of expenditure

7.33 In terms of comparison goods expenditure, Table 7.19 indicates significant variations in the Study Area retention rate both by zone and by goods type. In particular, as would be expected, zones situated at the periphery of the Study Area and in proximity to competing facilities (such as Zones 11, 13, 14 and 15) are the subject of very moderate levels of comparison goods expenditure retention. This is particularly the case for certain goods categories, including clothing and footwear, household goods and electrical goods, where centres just outside the Study Area, such as Grimsby and Scunthorpe, have significant influence.

Table 7.19: Study Area Current Market Share – Comparison (2011)

Zone	Market Share (%)								
	Clothing & Footwear	Books, CDs, etc.	Household Goods	Toys, etc.	Chemist	Electrical	Furniture	DIY	Total
1.	56.4	75.5	57.4	64.9	80.9	56.1	56.8	56.6	62.7
2.	89.3	96.9	85.2	88.9	95.6	97.2	87.9	96.3	92.0
3.	57.0	72.7	78.3	76.5	86.3	80.3	78.6	77.9	73.8
4.	72.7	66.0	68.9	84.8	91.4	62.5	67.6	76.9	75.0
5.	81.1	89.4	79.4	85.3	93.4	89.5	79.7	90.4	85.8
6.	94.6	98.1	91.4	97.7	100.0	97.5	92.2	98.8	96.4
7.	96.6	98.0	95.2	95.3	96.8	96.3	94.0	96.1	96.2
8.	88.2	90.6	94.1	97.8	97.9	93.9	92.5	95.0	93.3
9.	42.7	56.1	40.0	64.7	69.0	43.1	43.1	59.7	52.1
10.	63.6	78.4	56.9	66.7	84.5	60.3	62.3	80.2	68.7
11.	24.2	41.3	24.1	23.8	50.5	23.2	36.8	35.0	31.1
12.	46.1	57.8	39.7	48.7	71.4	36.7	55.8	47.7	50.2
13.	33.7	46.9	41.1	21.4	62.8	33.3	54.3	44.4	40.3
14.	39.3	41.1	37.7	30.4	69.9	52.0	33.3	48.8	44.3
15.	14.0	30.0	25.4	15.0	56.5	25.3	40.8	54.3	29.7
Total	**63.8**	**72.8**	**64.2**	**69.2**	**82.9**	**66.3**	**67.6**	**72.7**	**69.5**

Source: Derived from Expenditure Tables provided at Appendix 6
Based on market share of expenditure

Forecast Growth in Expenditure Attracted to Study Area

7.34 Under population growth 'Scenario A', the Study Area population is expected to grow from around 464,391 to 528,511 people between 2011 and 2031, with forecast growth in convenience goods expenditure predicted to increase at an average of 0.37% per capita per annum across the same period. Accordingly, it is estimated that the Study Area will experience an increase in convenience goods expenditure of approximately £193.61m by 2031. Assuming a constant Study Area market share of 80.5%, this equates to an increase in retained convenience goods expenditure of approximately £155.84m by 2031.

7.35 Population growth 'Scenario B' suggests a greater increase in Study Area population from 465,284 to 564,511 people in the period to 2031, which, in turn, suggests an increase in convenience goods expenditure of £261.54m over the period. Applying the same constant market share of 80.5%, an additional £210.51m of convenience goods expenditure is available to facilities within the Study Area at 2031.

7.36 For comparison goods under population growth 'Scenario A', the significant predicted increase in expenditure on comparison goods (an average 2.79% per capita per annum increase in the period 2011 to 2031) results in a further £1,094.25m of comparison goods expenditure being generated within the Study Area by 2031. Assuming a constant Study Area market share of 69.5%, it is estimated that facilities within the Study Area will capture around a further £760.25m of comparison goods expenditure by 2031.

7.37 Under population growth 'Scenario B', a greater level of available comparison goods expenditure is once again identified, with an additional £1,237.02m being generated in the Study Area in the period to 2031. Assuming the same constant market share of comparison goods expenditure – 69.5% – further facilities within the catchment will capture an additional £859.88m under the higher population growth scenario.

7.38 It should again be noted that the level of growth identified under 'Scenario B' is based upon an ambitious target for growth, which will require the delivery of substantial numbers of dwellings throughout the entire period to 2031. Given the need for the sustained delivery of new dwellings over a number of years, the level of growth identified under 'Scenario B' will need to be the subject to regular review to ensure that it accords with the number of dwelling completions and related population growth going forward.

7.39 The above analysis is also based on 'rolling forward' the current market share within the Study Area for each category of goods. This approach of rolling forward existing market shares is in line with standard practice and does not take into account the desirability or need to 'claw back' leakage between expenditure directed to centres elsewhere which might be achieved through improvements in retail provision. However, in this regard it should be noted that the current market share of the Study Area as a whole is considered reasonably healthy, particularly in the 'core' zones in the three Central Lincolnshire authority areas. Whilst it may be desirable to secure opportunities to 'claw back' expenditure and increase the retention rate of certain goods categories in some of the centres (in particular, it is considered that additional comparison goods expenditure could realistically be retained around Sleaford as a result of improved provision), the likely ability to increase retention will need to be assessed at the time of the consideration of future development proposals, with reference to their scale and function and with reference to other committed and proposed development.

7.40 In any event, in order for the Study Area to capture the significant growth in retail expenditure which is forecast (particularly for comparison goods), it is likely that there will be a need to enhance future retail provision, thereby ensuring that this growth is not lost to competing centres and that the future Study Area retention rate does not decline.

7.41 If an excess of comparison or convenience goods expenditure manifests itself within the Study Area, this does not necessarily translate directly into a requirement for additional floorspace. In assessing quantitative need, it is also necessary to take account of:

- Existing development proposals;
- Expected changes in shopping patterns;
- The current capacity and efficiency of retail floorspace within the established centres;
- Future changes in business productivity and current development commitments; and
- Potential changes in forecast expenditure growth in the future.

8.0 Retail Capacity and the Role of Central Lincolnshire Town Centres

8.01 The quantitative modelling for the capacity assessment has been undertaken for both convenience and comparison goods shopping. Our approach in undertaking the study was informed by Policy EC1.4 of PPS4, which states that:

'…when assessing quantitative need, have regard to relevant market information and economic data, including a realistic assessment of:

i. existing and forecast population levels

ii. forecast expenditure for specific classes of goods to be sold, within the broad categories of comparison and convenience goods and for main leisure sectors and

iii. forecast improvements in retail sales density.'

8.02 For the purposes of this capacity exercise, WYG has primarily examined the need for new convenience and comparison goods floorspace. Indicative capacity assessments are provided for 2016, 2021, 2026 and 2031, but any assessment in the long-term should be viewed with caution. Any identified need or capacity identified beyond 2016 is not justification for new retail floorspace outside of centres, as this could prejudice the implementation of emerging town centre redevelopment strategies and the development of more central sites which, although not available for retail development at present, may become available between now and 2016 or after 2016. Tables providing full details of inputs and the step-by-step application of the methodology set out below are provided at Appendices 6 and 7.

Capacity Formula

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

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

- Growth in population;

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

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

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

8.04 Although a surplus figure is presented in monetary terms, it is possible to convert this figure to provide an indication of the quantum of floorspace which may be required. The level of floorspace will vary dependent on the type of retailer proposed and the type of goods traded. For example, electrical retailers such as Currys (which is considered a bulky goods retailer) have a much higher sales density than other bulky goods retailers such as Carpetright, and clothing and footwear (non-bulky goods) operators generally have a higher sales density than bulky goods retailers.

8.05 Accordingly, for both convenience and comparison goods, the identified monetary surplus is converted into a minimum and maximum floorspace requirement which effectively indicates the range in the need for new provision, dependent on the type and format of development which is brought forward. For convenience goods floorspace, the minimum requirement assumes that the identified need will be met by one of the 'big four' supermarket retailers (which achieve high average sales densities) and the maximum requirement assumes the need is met by an independent or discount retailer (which achieve lower sales densities). For comparison goods floorspace, the minimum requirement assumes the provision of bespoke high street retail accommodation (which should be capable of achieving a high sales density) and the maximum requirement assumes the provision of out of centre retail park accommodation (which generally achieve lower sales densities).

Future Quantitative Capacity for Convenience Goods

8.06 In order to ascertain the likely need for additional convenience goods floorspace for each of the four main centres within Central Lincolnshire, it is first necessary to consider the current provision. For each centre, it is assumed that future expenditure available to the centre will be based upon the existing cumulative market share claimed by stores within or surrounding the centre.

8.07 Table 8.1 below sets out the survey-derived turnover under population growth 'Scenario A' of each food retail destination located within or in close proximity to each of the four centres (fractionally more expenditure is claimed by each destination at 2011 under population growth 'Scenario B', but to provide for a clear and straightforward analysis, we provide our detailed consideration of over-trading in relation to population growth 'Scenario A' only). For each destination the survey-derived turnover is compared to a 'benchmark' turnover which indicates the level of turnover that the store would generally be expected to attract, based on company average trading levels. A judgement can then be made on the trading performance of existing facilities based on the comparison of the survey-derived turnover with the expected turnover (based on nationally published trading information from Mintel and Verdict) of existing provision.

8.08 The 'benchmark' turnover differs for each operator based on its average turnover per square metre throughout the country. Although robust up-to-date information is available in terms of the convenience goods floorspace provided by large foodstores, it can be more difficult to quantify the extent of local convenience provision as there is no single comprehensive database to rely upon. Where we have been unable to verify the exact quantum of floorspace provided by existing smaller-scale convenience stores, we have assumed that stores are trading 'at equilibrium' (i.e. the survey-derived turnover equates to the expected level of turnover). On each occasion, given the scale of the catchment and the stores' relatively central location within it, it has been assumed that all of the store's turnover will derive from within the Study Area.

8.09 Furthermore, as this assessment is based upon a 'goods based' approach which disaggregates expenditure by category type, it is important to recognise that major foodstore operators generally sell an element of non-food goods such as books, CDs, clothing and household goods. To account for this, the typical ratio between convenience/comparison goods provision for each operator[24] has been applied to the estimated net floorspace of each foodstore. This provides an indication of the likely sales area dedicated to the sale of convenience goods at each store.

8.10 Whilst survey results are commonly accepted as a means by which to identify existing shopping patterns, their findings should be treated with a 'note of caution' as they tend to have a bias towards larger stores and understate the role of smaller stores and independent retailers.

8.11 Table 8.1 indicates that, across the four centres considered together, the expected turnover of existing convenience goods shopping provision under population growth 'Scenario A' is £312.2m,

[24] Derived from 'UK Food & Grocery Retailers 2011', Verdict, September 2011

which compares to a survey-derived turnover of £388.0m. This suggests that, cumulatively, convenience goods floorspace is effectively 'overtrading' by some £75.8m under 'Scenario A' at 2011 (and by £76.8m under 'Scenario B' at 2011). The vast majority of this overtrading occurs in Lincoln, Sleaford and, to a lesser extent, Gainsborough, suggesting that there is a current undersupply of convenience goods floorspace within these centres.

8.12 Accepting the caveat provided at paragraph 8.09, the survey indicates that a number of superstores are performing particular strongly, in particular the Morrisons and Sainsbury's stores at Tritton Road in Lincoln (which overtrade by 68.7% and 44.6% respectively at 2011 under 'Scenario A'), the Tesco Extra at Wragby Road in Lincoln (which overtrades by 96.3%), and the Tesco at Northgate in Sleaford (which overtrades by 105.5%). It should be noted that, although the level of overtrading is high, such trading performances are not unheard of and occur elsewhere at the more successful stores operated by the 'big four' supermarket retailers elsewhere.

8.13 In order to appraise the need for additional convenience goods retail floorspace, it is necessary to consider how over-trading may be affected by future growth in expenditure. Accordingly, Tables 8.2, 8.4, 8.6, 8.8, 8.10, 8.12, 8.14 and 8.16 set out the anticipated increases in expenditure which will be available to each of the four centres under each population growth scenario, assuming that each centre's current market share is maintained. In each case, it is assumed that the turnover of existing floorspace will improve at the rates suggested by Figure 4a of Experian Retail Planner Briefing Note 9 (-1.7% at 2012; +0.4% per annum from 2013 to 2018; and +0.2% per annum from 2019). The future turnover of commitments has also been estimated through the application of these forecast changes in retail sales density.

8.14 Following this exercise, we then consider the effect existing retail commitments[25] will have in meeting identified convenience shopping needs (set out by Tables 8.3, 8.5, 8.7, 8.9, 8.11, 8.13, 8.15 & 8.17).

[25] Convenience goods commitments are detailed in the below commentary and at Table 6.6 of Appendices 6 and 7

Table 8.1: Trading Performance of Current Foodstores in Main Centres

Store	Net F'space (sq.m)	Net Conv F'space (sq.m)	T'over per sq.m (£)	Benchmark Turnover (£m)	Survey Estimate (£m)
Lincoln City Centre – Zone 7					
Morrisons, Tritton Road, Lincoln	3,064	2,424	12,035	29.2	49.2
Sainsburys, Tritton Road, Lincoln	3,756	2,779	11,520	32.0	46.3
Co-op, High Street, Lincoln	280	240	8,264	2.0	13.9
Tesco Express, Newark Road, Lincoln	304	202	11,942	2.4	5.3
Lidl, St Mark's Retail Park, Tritton Road, Lincoln	929	737	3,485	2.6	2.3
Tesco Express, St Mark's, High Street, Lincoln	328	218	11,942	2.6	0.7
Iceland, High Street, Lincoln	462	451	6,167	2.8	1.1
Other Lincoln Zone 7 Stores	-	-	-	12.3	12.3
Sub-Total Lincoln City Centre – Zone 7	**-**	**-**	**-**	**85.8**	**131.1**
Lincoln City Centre – Zone 8					
Asda, Nettleham Road, Lincoln	970	573	13,470	7.7	3.2
Co-op, Burton Road, Lincoln	236	202	8,264	1.7	2.2
Tesco Extra, Wragby Road, Lincoln	2,964	1,968	11,942	23.5	46.2
Waitrose, Searby Road, Lincoln	3,481	3,074	11,113	34.2	26.0
Tesco Extra, Canwick Road Trading Estate, Lincoln	2,465	1,637	11,942	19.5	14.6
Marks & Spencer, High Street, Lincoln	855	809	10,536	8.5	5.8
Iceland, Nettleham Road, Wolsey Way, Lincoln	517	505	6,167	3.1	2.3
Other Lincoln Zone 8 Stores	-	-	-	11.1	11.1
Sub-Total Lincoln City Centre – Zone 8	**-**	**-**	**-**	**109.3**	**111.3**
Sleaford Town Centre					
Tesco, Northgate, Sleaford	2,000	1,328	11,942	15.9	32.6
Sainsburys, Southgate Centre, Sleaford	1,493	1,105	11,520	12.7	11.2
Lidl, Northgate Centre, Sleaford	929	737	3,485	2.6	5.5
Iceland, Southgate, Sleaford	420	410	6,167	2.5	1.8
Other Sleaford Stores	-	-	-	5.5	5.5
Sub-Total Sleaford Town Centre	**-**	**-**	**-**	**39.1**	**56.5**
Gainsborough Town Centre					
Morrisons, Heapham Road, Gainsborough	2,504	1,980	12,035	23.8	34.2
Tesco, Beaumont Street, Gainsborough	2,582	1,714	11,942	20.5	20.6
Aldi, Lea Road, Gainsborough	604	416	4,670	1.9	6.2
Lidl, Ropery Road, Gainsborough	836	663	3,485	2.3	4.3
Marks & Spencer Simply Food, Marshall's Yard	613	581	10,536	6.1	3.2
Other Gainsborough Stores	-	-	-	9.2	9.2
Sub-Total Gainsborough Town Centre	**-**	**-**	**-**	**63.5**	**71.5**
Market Rasen Town Centre					
Tesco, Linwood Road, Market Rasen	1,325	880	11,942	10.5	13.8
Other Market Rasen Stores	-	-	-	3.9	3.9
Sub-Total Market Rasen Town Centre	**-**	**-**	**-**	**14.4**	**17.7**
Total	**-**	**-**	**-**	**312.2**	**388.0**

[1] Gross Floorspace derived from Experian Goad or IGD Database (2010)
[2] Net floorspace based on WYG judgement
[3] Net convenience floorspace derived from Verdict UK Grocery Retailers (2011) where available
[4] Sales densities derived from Verdict (2011) or Mintel Retail Rankings (2011) for national multiples and WYG assessment for local shops
[5] Survey derived turnover derived from Household Survey (2011)
At 2010 prices

Gainsborough – 'Scenario A'

8.15 Table 8.2 indicates that at 2011 under population growth 'Scenario A', an expenditure surplus of £7.9m (beyond the expected benchmark turnover of existing stores) is attracted to Gainsborough. Assuming convenience goods facilities maintain their existing market share, it is assumed that this surplus will grow to £10.3m at 2016, to £13.8m at 2021, to £17.8m at 2026, and to £22.0m at 2031.

8.16 However, whilst this apparent need would normally be such that it would support an additional foodstore in the short to medium term, we are aware of a substantial existing commitment in Gainsborough, this being the additional floorspace which would result from the redevelopment of the Tesco store at Trinity Street, which will provide a net sales area of up to 6,612 sq.m. Assuming the typical Tesco company sales area ratio, it is estimated that this floorspace will result in a convenience sales area which is around 2,676 sq.m larger than that provided by the existing Trinity Street store. This scale of provision is such that it extinguishes any quantitative need for additional convenience goods provision in the town in the period to 2031.

Table 8.2: Estimated Capacity for Convenience Goods Facilities in Gainsborough under 'Scenario A'

Year	Turnover - £m[1]	Available Expenditure - £m[2]	Surplus Expenditure - £m[2]
2011	63.5	71.5	7.9
2016	63.4	73.7	10.3
2021	64.3	78.1	13.8
2026	65.0	82.8	17.8
2031	65.6	87.6	22.0

[1] Allows for increases in turnover efficiency as set out in Experian Retail Planner Briefing Note 9 (September 2011)
[2] Assumes constant market share
At 2010 prices

Table 8.3: Quantitative Need for Additional Convenience Goods Floorspace in Gainsborough under 'Scenario A'

Year	Convenience Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2011	7.9	31.3	-23.4	-1,945	-4,674
2016	10.3	31.3	-21.0	-1,751	-4,207
2021	13.8	31.7	-18.0	-1,475	-3,544
2026	17.8	32.0	-14.2	-1,157	-2,780
2031	22.0	32.4	-10.4	-838	-2,013

[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
At 2010 prices

Gainsborough – 'Scenario B'

8.17 Through the application of the higher population growth 'Scenario B', Table 8.4 identifies an estimated expenditure surplus for Gainsborough of £8.0m at 2011 (beyond the expected benchmark turnover of existing stores), which is expected to grow to £11.4m at 2016, to £16.0m at 2021, to £21.5m at 2026, to £27.7m at 2031.

8.18 Again, whilst this need would normally support additional food retail floorspace in the short to medium term, the existing commitment at Trinity Street extinguishes any quantitative need for additional convenience goods provision until the much longer term (i.e. until 2031).

Table 8.4: Estimated Capacity for Convenience Goods Facilities in Gainsborough under 'Scenario B'

Year	Turnover - £m[1]	Available Expenditure - £m[2]	Surplus Expenditure - £m[2]
2011	63.5	71.5	8.0
2016	63.5	74.9	11.4
2021	64.4	80.4	16.0
2026	65.0	86.5	21.5
2031	65.7	93.3	27.7

[1] Allows for increases in turnover efficiency as set out in Experian Retail Planner Briefing Note 9 (September 2011)
[2] Assumes constant market share
At 2010 prices

Table 8.5: 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
At 2010 prices

Lincoln – 'Scenario A'

8.19 Table 8.6 sets out Lincoln's survey-derived convenience goods turnover and compares this with the expected benchmark turnover of the existing provision. Due principally to the very strong performance of the large Morrisons and Sainsbury's stores located at Tritton Road, a very significant expenditure surplus of £47.3m is identified at 2011, rising to £55.1m by 2016, to £67.3m by 2021, to £81.2m by 2026, and to £95.5m by 2031.

8.20 Existing significant commitments in the form of a replacement Tesco Extra store at Wragby Road (providing an additional estimated 1,820 sq.m of convenience goods sales floorspace), a further foodstore on Wragby Road (providing an estimated convenience goods sales area of 733 sq.m) and the redevelopment of the former Boultham Park Dairy (providing an estimated convenience goods sales area of 994 sq.m) are estimated to turn over £39.7m at 2011. Accordingly, even accounting for these commitments, there is still some quantitative need for additional food retail provision in the town in the short term to medium term – equating to a requirement for between 630 sq.m and 1,513 sq.m of additional net convenience goods floorspace at 2011, rising to between 4,386 sq.m and 10,540 sq.m at 2031. The level of need is such that it could support at least one superstore over the next ten years to 2021.

Table 8.6: Estimated Capacity for Convenience Goods Facilities in Lincoln under 'Scenario A'

Year	Turnover - £m[1]	Available Expenditure - £m[2]	Surplus Expenditure - £m[2]
2011	195.1	242.4	47.3
2016	194.9	250.0	55.1
2021	197.7	264.9	67.3
2026	199.6	280.8	81.2
2031	201.6	297.1	95.5

[1] Allows for increases in turnover efficiency as set out in Experian Retail Planner Briefing Note 9 (September 2011)
[2] Assumes constant market share
At 2010 prices

Table 8.7: Quantitative Need for Additional Convenience Goods Floorspace in Lincoln under 'Scenario A'

Year	Convenience Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2011	47.3	39.7	7.6	630	1,513
2016	55.1	39.6	15.5	1,289	3,099
2021	67.3	40.2	27.1	2,225	5,346
2026	81.2	40.6	40.6	3,303	7,938
2031	95.5	41.0	54.5	4,386	10,540

[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
At 2010 prices

Lincoln – 'Scenario B'

8.21 As we would anticipate, through the application of the higher population growth 'Scenario B', an even greater expenditure surplus is identified for Lincoln, this being £47.9 at 2011, rising to £59.4m at 2016, to £75.5m at 2021, to £94.1m at 2026, and to £114.9m at 2031.

8.22 Given this significant expenditure surplus, and after accounting for the existing commitments detailed above, the level of identified need is such that it could support significant additional convenience goods floorspace even over the short term and a number of food superstores in the longer term.

Table 8.8: Estimated Capacity for Convenience Goods Facilities in Lincoln under 'Scenario B'

Year	Turnover - £m[1]	Available Expenditure - £m[2]	Surplus Expenditure - £m[2]
2011	195.2	243.2	47.9
2016	195.0	254.4	59.4
2021	197.8	273.3	75.5
2026	199.7	293.9	94.1
2031	201.7	317.2	115.5

[1] Allows for increases in turnover efficiency as set out in Experian Retail Planner Briefing Note 9 (September 2011)
[2] Assumes constant market share
At 2010 prices

Table 8.9: 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
At 2010 prices

Market Rasen – 'Scenario A'

8.23 Market Rasen's collective convenience goods provision also attracts more expenditure than would be expected through reference to the expected benchmark turnover, resulting in an estimated expenditure surplus under population growth 'Scenario A' of £3.3m at 2011, rising to £3.8m at 2016, to £4.7m at 2021, to £5.8m at 2026, and to £6.8m at 2031. Given the lack of any identified convenience goods floorspace commitments in the town, this surplus results in an immediate but modest need for between 272 sq.m and 655 sq.m of convenience goods floorspace, rising to between 547 sq.m and 1,314 sq.m at 2031.

Table 8.10: Estimated Capacity for Convenience Goods Facilities in Market Rasen under 'Scenario A'

Year	Turnover - £m[1]	Available Expenditure - £m[2]	Surplus Expenditure - £m[2]
2011	14.4	17.7	3.3
2016	14.4	18.3	3.8
2021	14.6	19.4	4.7
2026	14.8	20.5	5.8
2031	14.9	21.7	6.8

[1] Allows for increases in turnover efficiency as set out in Experian Retail Planner Briefing Note 9 (September 2011)
[2] Assumes constant market share
At 2010 prices

Table 8.11: Quantitative Need for Additional Convenience Goods Floorspace in Market Rasen under 'Scenario A'

Year	Convenience Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2011	3.3	0.0	3.3	272	655
2016	3.8	0.0	3.8	321	770
2021	4.7	0.0	4.7	389	935
2026	5.8	0.0	5.8	468	1,124
2031	6.8	0.0	6.8	547	1,314

[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
At 2010 prices

Market Rasen – 'Scenario B'

8.24 The application of the higher population growth 'Scenario B' results in a moderate increase in expenditure surplus identified for Market Rasen, with the estimated surplus being £3.3m at 2011, rising to £4.1m at 2016, to £5.3m at 2021, to £6.7m at 2026, and to £8.2m at 2031. The identified need is still relatively limited under 'Scenario B' and does not suggest any requirement for substantial additional superstore provision over the short to medium term.

Table 8.12: Estimated Capacity for Convenience Goods Facilities in Market Rasen under 'Scenario B'

Year	Turnover - £m[1]	Available Expenditure - £m[2]	Surplus Expenditure - £m[2]
2011	14.4	17.7	3.3
2016	14.4	18.6	4.1
2021	14.6	19.9	5.3
2026	14.8	21.4	6.7
2031	14.9	23.1	8.2

[1] Allows for increases in turnover efficiency as set out in Experian Retail Planner Briefing Note 9 (September 2011)
[2] Assumes constant market share
At 2010 prices

Table 8.13: Quantitative Need for Additional Convenience Goods Floorspace in Market Rasen under 'Scenario B'

Year	Convenience Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2011	3.3	0.0	3.3	274	658
2016	4.1	0.0	4.1	344	826
2021	5.3	0.0	5.3	435	1,046
2026	6.7	0.0	6.7	541	1,300
2031	8.2	0.0	8.2	661	1,588

[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
At 2010 prices

Sleaford – 'Scenario A'

8.25 Sleaford's convenience shopping facilities attract significantly more expenditure than the stores' benchmark turnovers would suggest, indicating a substantial existing level of over-trading. An expenditure surplus of £17.3m is identified at 2011, rising to £19.2m at 2016, to £22.1m by 2021, to £25.4m at 2026, and to £28.8m at 2031.

8.26 Whilst this surplus represents a not insignificant need relative to the size of the town, we are aware of the committed Tesco Extra store at Southgate to the south of the town centre. The Tesco Extra store is to provide an additional 1,480 sq.m of convenience goods sales floorspace which, based on company average figures, will turn over around £17.5m at 2011. Accordingly, the proposed Tesco will meet the immediate identified need for additional convenience goods floorspace under population growth 'Scenario A'. After accounting for this commitment, we estimate that there will be a further need for between 140 sq.m and 335 sq.m of additional net comparison at 2016, rising to between 861 sq.m and 2,069 sq.m at 2031.

Table 8.14: Estimated Capacity for Convenience Goods Facilities in Sleaford under 'Scenario A'

Year	Turnover - £m[1]	Available Expenditure - £m[2]	Surplus Expenditure - £m[2]
2011	39.1	56.5	17.3
2016	39.1	58.2	19.2
2021	39.6	61.7	22.1
2026	40.0	65.4	25.4
2031	40.4	69.2	28.8

[1] Allows for increases in turnover efficiency as set out in Experian Retail Planner Briefing Note 9 (September 2011)
[2] Assumes constant market share
At 2010 prices

Table 8.15: Quantitative Need for Additional Convenience Goods Floorspace in Sleaford under 'Scenario A'

Year	Convenience Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2011	17.3	17.5	-0.2	-14	-34
2016	19.2	17.5	1.7	140	335
2021	22.1	17.7	4.3	357	859
2026	25.4	17.9	7.5	609	1,463
2031	28.8	18.1	10.7	861	2,069

[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
At 2010 prices

Sleaford – 'Scenario B'

8.27 The higher population growth proposed under 'Scenario B' results in a further increase in the identified convenience goods expenditure surplus identified for Sleaford, with the estimated surplus being £17.6m at 2011, rising to £20.2m at 2016, to £24.1m at 2021, to £28.5 at 2026, and to £33.5m at 2031. Whilst this surplus is still extinguished in the short term by the planning permission for the new Tesco store, it is evident that, under 'Scenario B', a significant quantum of additional convenience goods floorspace could be supported over the medium to long term. A minimum requirement for an additional 523 sq.m is identified at 2021 rising to a need for a minimum additional 1,244 sq.m at 2031.

Table 8.16: Estimated Capacity for Convenience Goods Facilities in Sleaford under 'Scenario B'

Year	Turnover - £m[1]	Available Expenditure - £m[2]	Surplus Expenditure - £m[2]
2011	39.2	56.7	17.6
2016	39.1	59.4	20.2
2021	39.7	63.7	24.1
2026	40.1	68.6	28.5
2031	40.5	74.0	33.5

[1] Allows for increases in turnover efficiency as set out in Experian Retail Planner Briefing Note 9 (September 2011)
[2] Assumes constant market share
At 2010 prices

Table 8.17: 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
At 2010 prices

Future Quantitative Capacity for Comparison Goods

8.28 As highlighted in Section 5 of this report, the four main town centres contain a varied range of comparison goods floorspace (including retail warehousing, high street multiples, independent retailers, and so on). Given the diverse range of retailers trading in the Study Area, it is considerably more difficult to accurately assess a likely 'benchmark' turnover for each facility. Therefore, the most accurate way to estimate the turnover of existing retail facilities is to analyse the existing market share claimed by each retail destination identified by the household survey.

8.29 Our analysis of the expenditure claimed by facilities in the four centres indicates that at 2011 the level of trade which originates from within the Study Area under population 'Scenario A' and which passes through non-food facilities is £62.7m in Gainsborough, £485.3m in Lincoln, £12.9m in Market Rasen, and £36.3m in Sleaford (marginally more expenditure is identified as being claimed by each centre under population growth 'Scenario B'). Cumulatively, this expenditure represents 53.1% of the total comparison goods expenditure generated from within the defined Study Area under both population growth scenarios. Due to difficulties in ascertaining accurate floorspace figures and reasonable benchmark turnovers for town centre stores which include a high proportion of independent traders, comparison goods facilities are considered to be trading 'in equilibrium' at the base year of 2011. From our knowledge of the centres, we consider the turnover identified by the household survey to be broadly in line with expectations and the assumption of the current trading performance being 'in equilibrium' is considered to be appropriate and robust.

8.30 In considering the expenditure which is available to support new facilities, it is assumed that the turnover of existing comparison goods floorspace will improve at the rates suggested by Figure 4b of Experian Retail Planner Briefing Note 9 (+1.8% at 2012; +1.5% at 2013; and +1.7% per annum from 2014).

Gainsborough – 'Scenario A'

8.31 Under growth 'Scenario A', our analysis indicates that the comparison goods facilities of Gainsborough claim in the order of £62.7m of comparison goods expenditure (both bulky and non-bulky), equating to 5.6% of all such expenditure which is generated within the Study Area. Assuming this market share is maintained and 'rolled forward' through future years, given increases in forecast comparison goods expenditure and projected increases in the Study Area population, we estimate that by 2016 an additional £8.6m originating from the Study Area will be spent on comparison goods. After allowing for an adjustment in the turnover efficiency of existing floorspace over the same period, a surplus of £3.1m is available at 2016 to support additional floorspace. This identified surplus is forecast to increase to £11.6m at 2021, to £22.6m at 2026, and to £35.9m at 2031.

8.32 However, whilst this apparent need would normally be such that it would support significant additional development, we are aware of existing substantial committed comparison goods floorspace in the Gainsborough area in the form of planning permission for non-food retail units at Corringham Road and for a new neighbourhood centre at Foxby Lane. It is estimated that these two commitments will together provide for around 1,938 sq.m of additional comparison goods sales floorspace. In addition, it is estimated that 1,354 sq.m of additional comparison goods floorspace will be provided by the redevelopment of the existing Tesco store at Trinity Street in Gainsborough. These extant commitments extinguish any need for additional comparison goods floorspace in the medium term, though it is estimated that between just 93 sq.m and 154 sq.m of additional net comparison sales could then be supported at 2026, and between 1,718 sq.m and 2,863 sq.m at 2031.

Table 8.18: Estimated Capacity for Comparison Goods Facilities in Gainsborough under 'Scenario A'

Year	Turnover - £m[1]	Available Expenditure - £m[2]	Surplus Expenditure - £m[2]
2011	62.7	62.7	0.0
2016	68.2	71.3	3.1
2021	74.2	85.8	11.6
2026	80.7	103.2	22.6
2031	87.8	123.7	35.9

[1] Allows for increases in turnover efficiency as set out in Experian Retail Planner Briefing Note 9 (September 2011)
[2] Assumes constant market share
At 2010 prices

Table 8.19: Quantitative Need for Additional Comparison Goods Floorspace in Gainsborough under 'Scenario A'

Year	Comparison Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2011	0.0	17.1	-17.1	-3,141	-5,690
2016	3.1	18.6	-15.4	-2,842	-4,736
2021	11.6	20.2	-8.5	-1,444	-2,407
2026	22.6	22.0	0.6	93	154
2031	35.9	23.9	12.0	1,718	2,863

[1] Average sales density assumed to be £5,000 per sq.m at 2011
[2] Average sales density assumed to be £3,000 per sq.m at 2011
At 2010 prices

Gainsborough – 'Scenario B'

8.33 Under 'Scenario B', we estimate that the comparison goods facilities of Gainsborough claim in the order of £62.8m of comparison goods expenditure generated within the Study Area at 2011. Again assuming that the existing market share is maintained and 'rolled forward', given the greater increases in forecast comparison goods expenditure under 'Scenario B', we estimate that by 2016 an additional £9.6m originating from the Study Area will be spent on comparison goods. After allowing for an adjustment in the turnover efficiency of existing floorspace over the same period, a surplus of £4.1m is available at 2016 to support additional floorspace, increasing to £14.0m at 2021, to £27.0m at 2026, and to £43.8m at 2031.

8.34 After making provision for the extant commitments considered above, there is again a need for additional floorspace in the period post-2021, with an identified requirement for between 778 sq.m and 1,296 sq.m of additional net comparison sales at 2021, and between 2,847 sq.m and 4,745 sq.m at 2031.

Table 8.20: Estimated Capacity for Comparison Goods Facilities in Gainsborough under 'Scenario B'

Year	Turnover - £m[1]	Available Expenditure - £m[2]	Surplus Expenditure - £m[2]
2011	62.8	62.8	0.0
2016	68.3	72.4	4.1
2021	74.3	88.3	14.0
2026	80.8	107.8	27.0
2031	87.9	131.7	43.8

[1] Allows for increases in turnover efficiency as set out in Experian Retail Planner Briefing Note 9 (September 2011)
[2] Assumes constant market share
At 2010 prices

Table 8.21: Quantitative Need for Additional Comparison Goods Floorspace in Gainsborough under 'Scenario B'

Year	Comparison Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2011	0.0	17.1	-17.1	-3,414	-5,690
2016	4.1	18.6	-14.4	-2,656	-4,426
2021	14.0	20.2	-6.2	-1,041	-1,734
2026	27.0	22.0	5.0	778	1,296
2031	43.8	23.9	19.9	2,847	4,745

[1] Average sales density assumed to be £5,000 per sq.m at 2011
[2] Average sales density assumed to be £3,000 per sq.m at 2011
At 2010 prices

Lincoln – 'Scenario A'

8.35 As indicated at paragraph 8.29 of this report, our assessment indicates that £485.3m of comparison goods expenditure which originates within the Study Area at 2011 is claimed by facilities in Lincoln under population growth 'Scenario A'. However, given Lincoln's extensive shopping facilities and the attraction of the cathedral and its cultural venues, it is considered appropriate to make an allowance for additional comparison goods expenditure which will be directed to Lincoln from outside the Study Area. In our view, given that Lincoln is at the centre of the Study Area (which has been drawn over a wide geographic area), it is reasonable to assume that only an additional 5% of turnover will be derived from outside the area.

8.36 The £485.3m of comparison goods Study Area expenditure which is claimed by Lincoln's facilities equates to 43.1% of all such expenditure generated within the Study Area. Given the 5% allowance for 'inflow', we estimated that Lincoln's comparison goods retailers will turn over £509.6m at 2011.

8.37 Assuming this market share and level of 'inflow' is maintained and 'rolled forward' through future years, increases in forecast comparison goods expenditure and projected increases in population will result in a forecast additional £69.5m originating from the Study Area and beyond being spent on comparison goods at 2016. After allowing for increases in the turnover efficiency of existing floorspace, a surplus of £25.3m is available at 2016 to support additional floorspace, rising to £94.6m at 2021, to £183.3m at 2026 and to £291.8m at 2031.

8.38 In Lincoln there are a number of extant commitments, including the comparison goods element of foodstore planning permissions at Wragby Road and at the former Boultham Park Dairy, and the further comparison goods floorspace which is committed at the Carlton Centre. These three commitments cumulatively provide an estimated 2,469 sq.m of comparison goods sales floorspace. However, the most significant committed comparison goods floorspace is the Lincolnshire Co-operative Lindongate development (for which planning permission was approved in March 2012) which is to provide an estimated 20,397 sq.m of comparison sales floorspace. We estimate that this development could turn over in the order of £102.0m (at 2010 prices), which extinguishes the need for any further comparison goods floorspace in Lincoln in the medium term.

8.39 Taking account of consented development, we estimate that there will be a requirement for additional floorspace by 2026, equating to between 4,570 sq.m and 7,617 sq.m, and growing to between 17,774 sq.m and 29,623 sq.m at 2031.

Table 8.22: Estimated Capacity for Comparison Goods Facilities in Lincoln under 'Scenario A'

Year	Turnover - £m[1]	Available Expenditure from Catchment - £m[2]	Inflow Expenditure - £m[2]	Surplus Expenditure - £m[2]
2011	509.6	485.3	24.3	0.0
2016	553.8	551.5	27.6	25.3
2021	602.5	664.0	33.2	94.6
2026	655.5	798.8	39.9	183.3
2031	713.2	957.1	47.9	291.8

[1] Allows for increases in turnover efficiency as set out in Experian Retail Planner Briefing Note 9 (September 2011)
[2] Assumes constant market share
At 2010 prices

Table 8.23: Quantitative Need for Additional Comparison Goods Floorspace in Lincoln under 'Scenario A'

Year	Comparison Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2011	0.0	119.6	-119.6	-23,921	-39,869
2016	25.3	130.0	-104.7	-19,273	-32,122
2021	94.6	141.4	-46.8	-7,916	-13,193
2026	183.3	153.9	29.4	4,570	7,617
2031	291.8	167.4	124.4	17,774	29,623

[1] Average sales density assumed to be £5,000 per sq.m at 2011
[2] Average sales density assumed to be £3,000 per sq.m at 2011
At 2010 prices

Lincoln – 'Scenario B'

8.40 Under 'Scenario B', and again assuming that that an additional 5% of turnover will derive from 'inflow' from outside the Study Area, it is estimated that the comparison goods facilities of Lincoln claim a total of £510.9m of comparison goods expenditure at 2011. Again assuming that the existing market share and level of 'inflow' is maintained and 'rolled forward', given the greater increases in forecast comparison goods expenditure under 'Scenario B', we estimate that by 2016 an additional £77.9m will be spent in Lincoln on comparison goods. After allowing for improvements in the turnover efficiency of existing floorspace over the same period, a comparison goods surplus of £33.5m is available at 2016 to support additional floorspace, increasing to £114.1m at 2021, to £219.3m at 2026, and to £356.4m at 2031.

8.41 After making provision for the extant commitments considered above, there is again a further need for additional floorspace in the long term only, with an identified requirement for between 10,174 sq.m and 16,957 sq.m of additional net comparison sales at 2026, rising to between 27,007 sq.m and 45,012 sq.m at 2031.

Table 8.24: Estimated Capacity for Comparison Goods Facilities in Lincoln under 'Scenario B'

Year	Turnover - £m[1]	Available Expenditure from Catchment - £m[2]	Inflow Expenditure - £m[2]	Surplus Expenditure - £m[2]
2011	510.9	486.6	24.3	0.0
2016	555.3	560.8	28.0	33.5
2021	604.2	684.1	34.2	114.1
2026	657.3	834.8	41.7	219.3
2031	715.1	1020.4	51.0	356.4

[1] Allows for increases in turnover efficiency as set out in Experian Retail Planner Briefing Note 9 (September 2011)
[2] Assumes constant market share
At 2010 prices

Table 8.25: Quantitative Need for Additional Comparison Goods Floorspace in Lincoln under 'Scenario B'

Year	Comparison Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2011	0.0	119.6	-119.6	-23,921	-39,869
2016	33.5	130.0	-96.5	-17,753	-29,589
2021	114.1	141.4	-27.3	-4,616	-7,694
2026	219.3	153.9	65.4	10,174	16,957
2031	356.4	167.4	189.0	27,007	45,012

[1] Average sales density assumed to be £5,000 per sq.m at 2011
[2] Average sales density assumed to be £3,000 per sq.m at 2011
At 2010 prices

Market Rasen – 'Scenario A'

8.42 Existing comparison goods retailers in Market Rasen claim only a relatively limited share of comparison goods expenditure generated from within the Study Area, equating to 1.2% of total spend or £12.9m at 2011. Assuming once again that this market share is maintained and 'rolled forward' over the reporting period, increases in forecast comparison goods expenditure and projected increases in population will result in a forecast additional £1.7m originating from the Study Area to be spent on comparison goods in Market Rasen by 2016. After allowing for increases in the turnover efficiency of existing floorspace, a surplus of £0.6m is available at 2016 to support additional floorspace, rising to £2.4m at 2021, to £4.6m at 2026, and to £7.4m at 2031.

8.43 We are not aware of any committed comparison goods floorspace in or around Market Rasen Town Centre and this surplus therefore equates to a direct (but limited) need for between 117 sq.m and 196 sq.m of additional comparison goods floorspace at 2016, rising to between 404 sq.m and 674 sq.m at 2021, between 720 sq.m and 1,199 sq.m at 2026, and between 1,053 sq.m and 1,755 sq.m at 2031.

Table 8.26: Estimated Capacity for Comparison Goods Facilities in Market Rasen under 'Scenario A'

Year	Turnover - £m[1]	Available Expenditure - £m[2]	Surplus Expenditure - £m[2]
2011	12.9	12.9	0.0
2016	14.0	14.6	0.6
2021	15.2	17.6	2.4
2026	16.6	21.2	4.6
2031	18.0	25.4	7.4

[1] Allows for increases in turnover efficiency as set out in Experian Retail Planner Briefing Note 9 (September 2011)
[2] Assumes constant market share
At 2010 prices

Table 8.27: Quantitative Need for Additional Comparison Goods Floorspace in Market Rasen under 'Scenario A'

Year	Comparison Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2011	0.0	0.0	0.0	0	0
2016	0.6	0.0	0.6	117	196
2021	2.4	0.0	2.4	404	674
2026	4.6	0.0	4.6	720	1,199
2031	7.4	0.0	7.4	1,053	1,755

[1] Average sales density assumed to be £5,000 per sq.m at 2011
[2] Average sales density assumed to be £3,000 per sq.m at 2011
At 2010 prices

Market Rasen – 'Scenario B'

8.44 Under 'Scenario B' it is estimated that the comparison goods facilities of Market Rasen claim a still limited £12.9m of all comparison goods expenditure generated within the Study Area at 2011. Assuming once more that the existing market share is maintained and given the greater increases in forecast comparison goods expenditure under 'Scenario B', we estimate that by 2016 an additional £1.9m originating from the Study Area will be spent in Market Rasen on comparison goods. After allowing for an adjustment in the turnover efficiency of existing floorspace over the same period, a comparison goods surplus of £0.8m is available at 2016 to support additional floorspace, increasing to £2.9m at 2021, to £5.5m at 2026, and to £9.0m at 2031.

8.45 Given the lack of any committed comparison goods floorspace in or around Market Rasen Town Centre, the surplus identified under growth 'Scenario B' equates to a still limited need for between 155 sq.m and 259 sq.m of additional comparison goods floorspace at 2016, rising to between 487 sq.m and 811 sq.m at 2021, between 859 sq.m and 1,432 sq.m at 2026, and between 1,284 sq.m and 2,140 sq.m at 2031.

Table 8.28: Estimated Capacity for Comparison Goods Facilities in Market Rasen under 'Scenario B'

Year	Turnover - £m[1]	Available Expenditure - £m[2]	Surplus Expenditure - £m[2]
2011	12.9	12.9	0.0
2016	14.0	14.8	0.8
2021	15.2	18.1	2.9
2026	16.6	22.1	5.5
2031	18.0	27.0	9.0

[1] Allows for increases in turnover efficiency as set out in Experian Retail Planner Briefing Note 9 (September 2011)
[2] Assumes constant market share
At 2010 prices

Table 8.29: Quantitative Need for Additional Comparison Goods Floorspace in Market Rasen under 'Scenario B'

Year	Comparison Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2011	0.0	0.0	0.0	0	0
2016	0.8	0.0	0.8	155	259
2021	2.9	0.0	2.9	487	811
2026	5.5	0.0	5.5	859	1,432
2031	9.0	0.0	9.0	1,284	2,140

[1] Average sales density assumed to be £5,000 per sq.m at 2011
[2] Average sales density assumed to be £3,000 per sq.m at 2011
At 2010 prices

Sleaford – 'Scenario A'

8.46 Comparison goods retailers in Sleaford claim 3.3% of all comparison goods expenditure generated within the Study Area, equating to £36.3m in monetary terms under population growth 'Scenario A' at 2011. Assuming once more that this market share is 'rolled forward', increases in forecast comparison goods expenditure and projected increases in population will result in a forecast additional £4.9m originating from the Study Area being spent in Sleaford at 2016. After allowing for increases in the turnover efficiency of existing floorspace, there is estimated to be a resultant expenditure surplus of £1.8m available at 2016 to support additional floorspace, rising to £6.7m at 2021, to £13.0m at 2026, and to £20.8m at 2031.

8.47 Sleaford is already the subject of very significant committed comparison goods floorspace in the form of the additional comparison goods floorspace provided through Tesco Extra development at Southgate, the redevelopment of existing Tesco floorspace into four non-food retail units at Northgate, and two further developments at Southgate and the Market Place. Cumulatively, these developments provide a total of 6,922 sq.m of comparison goods sales floorspace. Such significant developments negate any quantitative need for further comparison goods development over the entire reporting period to 2031.

Table 8.30: Estimated Capacity for Comparison Goods Facilities in Sleaford under 'Scenario A'

Year	Turnover - £m[1]	Available Expenditure - £m[2]	Surplus Expenditure - £m[2]
2011	36.3	36.3	0.0
2016	39.4	41.2	1.8
2021	42.9	49.6	6.7
2026	46.6	59.7	13.0
2031	50.7	71.5	20.8

[1] Allows for increases in turnover efficiency as set out in Experian Retail Planner Briefing Note 9 (September 2011)
[2] Assumes constant market share
At 2010 prices

Table 8.31: Quantitative Need for Additional Comparison Goods Floorspace in Sleaford under 'Scenario A'

Year	Comparison Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2011	0.0	29.5	-29.5	-5,896	-9,827
2016	1.8	32.0	-30.2	-5,566	-9,276
2021	6.7	34.9	-28.1	-4,757	-7,929
2026	13.0	37.9	-24.9	-3,869	-6,448
2031	20.8	41.3	-20.5	-2,930	-4,883

[1] Average sales density assumed to be £5,000 per sq.m at 2011
[2] Average sales density assumed to be £3,000 per sq.m at 2011
At 2010 prices

Sleaford – 'Scenario B'

8.48 Under 'Scenario B' it is estimated that Sleaford's comparison goods facilities claim £36.4m of all comparison goods expenditure generated within the Study Area at 2011. Assuming the continuation of the existing market share and allowing for the greater increases in forecast comparison goods expenditure which arise under 'Scenario B', we estimate that by 2016 an additional £5.6m originating from the Study Area will be spent in Sleaford on comparison goods. After allowing for an adjustment in the turnover efficiency of existing floorspace over the same period, a comparison goods surplus of £2.4m is available at 2016 to support additional floorspace, increasing to £8.1m at 2021, to £15.6m at 2026, and to £25.4m at 2031.

8.49 After making provision for the significant extant commitments considered above, even under the higher population projected by 'Scenario B', there is still no quantitative need for additional floorspace over the whole reporting period.

Table 8.32: Estimated Capacity for Comparison Goods Facilities in Sleaford under 'Scenario B'

Year	Turnover - £m[1]	Available Expenditure - £m[2]	Surplus Expenditure - £m[2]
2011	36.4	36.4	0.0
2016	39.6	42.0	2.4
2021	43.1	51.2	8.1
2026	46.9	62.5	15.6
2031	51.0	76.4	25.4

[1] Allows for increases in turnover efficiency as set out in Experian Retail Planner Briefing Note 9 (September 2011)
[2] Assumes constant market share
At 2010 prices

Table 8.33: Quantitative Need for Additional Comparison Goods Floorspace in Sleaford under 'Scenario B'

Year	Comparison Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2011	0.0	29.5	-29.5	-5,896	-9,827
2016	2.4	32.0	-29.7	-5,456	-9,094
2021	8.1	34.9	-26.7	-4,520	-7,533
2026	15.6	37.9	-22.3	-3,465	-5,775
2031	25.4	41.3	-15.8	-2,264	-3,774

[1] Average sales density assumed to be £5,000 per sq.m at 2011
[2] Average sales density assumed to be £3,000 per sq.m at 2011
At 2010 prices

Qualitative Need

8.50 The above analysis provides an assessment of quantitative capacity based upon the current market share achieved by existing facilities in a particular centre being maintained. However, it is evident that certain centres would significantly benefit from improved provision and, in doing so, would attract significantly greater number of shoppers, thereby increasing market share. Through improvements in the retail offer, the long-term viability of centres can be safeguarded and the need to travel further afield can be reduced.

8.51 Gainsborough has already been the subject of recent significant development in the form of the Marshall's Yard, which is reflected in the centre's recent improvement in national rankings. Furthermore, there are plans to increase its convenience goods offer through the introduction of a new Tesco superstore. With this in mind, the potential to further enhance market share once these developments have achieved a stable trading pattern may be more limited in comparison to other key centres in the Study Area.

8.52 Lincoln is considered to perform strongly in terms of its market share and currently accommodates a wide range of comparison and convenience goods retailers, with all of the 'big four' supermarket retailers having substantial stores in and around the town centre. Accordingly, whilst we have identified a significant quantitative need for additional retail facilities in the town (which will principally be met in terms of comparison goods floorspace over the medium term by the Lindongate development), these will effectively act to maintain Lincoln's current role as an important sub-regional shopping centre.

8.53 Furthermore, we anticipate that the significant interest for further comparison goods development in Lincoln in the future which will help meet the growing needs of its catchment population as well as enhancing its attractiveness over a wider area.

8.54 Market Rasen is considered to have some potential to 'claw back' convenience goods expenditure which is currently lost from its immediate catchment (it currently claims less than a third of convenience goods expenditure generated in Zone 14, which surrounds it). In this regard, it is notable that Tesco is the only one of the big four foodstore operators currently in the town and, partly as a result, significant convenience goods expenditure from the zone is currently directed to Grimsby and Cleethorpes. Accordingly, should an appropriate opportunity come to light and a further significant food superstore be attracted to the town, it is considered that a significant step change in the market share could be achieved thereby increasing the overall quantitative need previously identified by this study.

8.55 It is evident from the above commentary and through our observations in the field 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). In improving the provision, it is likely that an uplift in the overall market share would be achieved, thereby increasing the quantitative need.

8.56 The same principle also applies to the comparison goods offer within Sleaford where there is significant leakage, particularly for clothing and footwear. Therefore, subject to the right development opportunity/opportunities being secured in order to provide appropriate large modern retail premises to meet the requirements of the national multiples, then there is significant potential to enhance the market share of Sleaford in this sector. This, in turn, would create greater quantitative need to that previously identified.

9.0 Future Opportunities for Accommodating Growth

Introduction

9.01 In order to identify, examine and appraise the opportunities which exist to accommodate future growth, WYG has consulted extensively with officers of the three local authorities and the Joint Planning Unit, representatives of the Business Improvement Groups, and developers. We also draw upon existing and emerging development plan documents, the recent masterplan commissions detailed at Section 4 of this report, and our observations in the field during extensive site visits undertaken between July and October of 2011.

9.02 We set out below what we consider to be the key opportunity sites in each of the four main town centres (which should be prioritised as locations to accommodate future development) and an indication as to the broad type and scale of development that may be achievable. Following this, we then consider the appropriateness of the existing leisure service provision within the Study Area.

Gainsborough

9.03 Given the success and apparently strong trading performance of the Marshall's Yard development, it is considered that there is only a limited quantitative and qualitative need for additional comparison retail facilities in Gainsborough in the short term. However, it is evident that Gainsborough would benefit from a more rounded and comprehensive offer – particularly to cater for increased population resulting from its Growth Point status – and, in this context, we note West Lindsey Council's promotion of the proposed **Elswitha Quarter** development.

9.04 The Council's development brief for the site was approved by members at committee in January 2011. The brief indicates that the site comprises 0.7 hectares of land which is predominantly in the ownership of West Lindsey District Council. The site comprises the following parcels of land:

- The former Guildhall Council office building and car parking area which extends to 0.4 hectares;
- Ship Court car park, which provides a further 42 car parking spaces;
- Whitton's Gardens, which is protected open space linking the site to the Riverside; and
- The Grade II* listed Elswith Hall, which is utilised as a doctors' surgery and which has potential for re-use for alternative forms of development.

9.05 The development brief suggests that future development should take a form of between three and five storeys, and that uses falling within Use Classes A1, A2, A3, A4 and C1 would be considered at ground floor, with Classes C1, C2, C3, D1 and D2 above. However, it is our understanding that the scheme is currently being presented to the market as being most suited to leisure uses – bars, restaurants and a hotel – with the potential for office accommodation at first floor and above on parts of the site. In our view, such uses may be more appropriate than retail, given the size of the site, its location and the current requirements of the retail market.

9.06 In retail terms, the greatest future opportunity lies in the potential to refurbish or redevelop the **Lindsey Centre, its car park and the adjacent Beltons Printing** premises. The Lindsey Centre was identified as having significant redevelopment potential by the 2007 Gainsborough Regained Masterplan, not only in order to provide more modern retail accommodation which better meets the current needs of retailers, but also to open up the Market Place to the south and the east. The centre currently turns its back on both Marshall's Yard and is sited in such a manner as to be relatively impenetrable to those wishing to travel between Marshall's Yard and the rest of the town centre.

9.07 By incorporating the adjacent Beltons Printing premises, it is considered that a site of a sufficient size could be assembled to deliver a range of units of appropriate scale, whilst retaining car parking on site and improving linkages and accessibility across the retail core. However, given the current occupation of premises and the lack of current retail demand, it is considered that any such development would be realised over the medium to long term only. Notwithstanding this, the redevelopment of the site could have a significant and prolonged positive impact on the functionality of the centre and its attractiveness to shoppers, and it is recommended that any opportunity to bring about the centre's redevelopment should be pursued as a priority.

9.08 Other sites in Gainsborough which offer some redevelopment potential include the **Magistrates' Court** and the **former Baltic Mill** site, both of which are relatively small in scale and both of which may be suited to a range of town centre uses, particularly office, residential[26] or hotel development.

[26] The appropriateness of residential uses may be subject to the consideration of flood mitigation measures

Lincoln

9.09 The principal redevelopment opportunity in Lincoln is the proposed **Lindongate** development, which was formerly being promoted by Modus Ventures prior to it entering administration. The Lindongate site is bounded by Waterside South to the north, by Melville Street to the east, by St Mary's Street to the south, and by Sincil Street to the west.

9.10 Three planning applications for the site's redevelopment were submitted in June 2008, which together provided for the demolition of the existing bus station, multi-storey car park, retail units and former Grand Hotel, and the erection of a mixed-use development comprising 29,139 sq.m of retail floorspace, residential units, a hotel, food and drink units, a replacement bus station, car parking and associated highway works. A revision to the application (for a broadly similar scheme, albeit one which has a significantly reduced level of residential development and no hotel) was submitted by the principal landowner, Lincolnshire Co-operative Limited, at the end of 2011 and was approved by the City of Lincoln Council in March 2012.

9.11 The approved scheme would deliver a significant quantum of modern retail floorspace, including a department store, in a location which would link with existing shopping destinations both north and south of the railway crossing on High Street. A modern department store would provide a significant qualitative improvement to Lincoln City Centre, though we have some concerns as to whether the scheme in its current incarnation appropriately caters for the needs of retailers, given the number of relatively small units which are proposed. Furthermore, as we have indicated at Section 2 of this report, other similar schemes elsewhere in the country are currently dependent on the inclusion of an element of food retail to ensure their viability, and we believe that such a revision could potentially assist in bringing the wider opportunity forward. The current scheme would effectively result in a reduction in the provision of convenience goods floorspace as there is no provision to replace the Co-op foodstore which would be demolished to facilitate the development.

9.12 Elsewhere, the greatest retail opportunities in the short term lie in the sensitive refurbishment of existing properties and in maximising the potential of existing retail assets, such as the **Central Market** (at the time of reporting, around 15 of the market's 80 stalls were available for rent), the **Waterside Centre** and **High Street** (south of the crossing). We consider that the existing **St Mark's Retail Park** may have some potential for expansion (or potential for the reconfiguration of existing floorspace), but we are currently unaware of any firm proposals to provide additional retail floorspace at the retail park. In any event, in the current economic climate, the provision of additional floorspace at St Mark's may well have a detrimental impact on efforts to bring forward Lindongate, which is the sequentially superior of the two and which should clearly be the prioritised opportunity.

9.13 We are aware of the significant efforts that have been made by the City of Lincoln Council in promoting the centre's offer through the 'Cathedral Quarter' and 'Cultural Quarter' initiatives, and also the positive, ongoing impact that the University of Lincoln has made to the economy in recent years. Furthermore, whilst there have been some successes in improving the leisure offer at Brayford Riverside, further appropriate development at this location will act (with Lindongate) to create pedestrian activity from east to west across High Street, rather than just north to south, as typically occurs at present. Pedestrian movement would also be assisted through the further part pedestrianisation of High Street to the south of the railway crossing.

Market Rasen

9.14 Section 8 of this report identifies only a very limited quantitative need for additional convenience and comparison goods floorspace in Market Rasen in the short to medium term, and the principal aspiration should be to secure qualitative improvements to the retail and leisure offer, and to improve the attractiveness of building frontages and the overall town centre environment.

9.15 Given the tight urban grain and historic nature of many of the buildings, there are likely to be few opportunities for substantial redevelopment in Market Rasen and we are unaware of any significant retail schemes that are currently being pursued in the centre.

Sleaford

9.16 In contrast, there are a number of high-profile development proposals which are being progressed in Sleaford, which will have a substantial impact on the centre's future and how it trades.

9.17 Planning permission was granted in March 2011 for the replacement Tesco store at the **former Advanta Seeds** site off Southgate, which is to provide a net sales area of up to 5,621 sq.m, with no more than 2,511 sq.m given over to the sale of comparison goods. The new Tesco Extra store is dependent on the provision of a new access road, linking Boston Road to the north of the railway line to Mareham Lane to the south. We are informed that part of the land required for the link road (at Boston Road recreation ground) is in the ownership of Sleaford Town Council and that a resolution was passed in August 2011 by the Town Council to retain the land for public recreation purposes. Notwithstanding this, we are aware that both Tesco and North Kesteven District Council remain committed to bringing the development forward and that efforts to acquire the land in question remain ongoing.

9.18 The link road is also required to provide access to the **Bass Maltings** complex, a Grade II* listed building which has been vacant and in a state of disrepair for a number of years. Planning permission was resolved to be approved subject to legal agreement by North Kesteven District Council in April 2011, to secure the Maltings' redevelopment for a range of uses, including 228 residential dwellings, retail and commercial floorspace, healthcare facilities, offices, community buildings and associated car parking. The provision of 228 units includes the erection of 24 new build dwelling houses on land to the east of the Maltings buildings. Whilst retail floorspace provides only a limited proportion of the application proposal (up to 1,391 sq.m gross), the Maltings development is clearly of great importance to Sleaford town centre in increasing activity and in supporting linked trips, and in increasing the resident population within walking distance of the centre. It was reported by the Lincolnshire Echo in October 2011 that the signing of the legal agreement and the issue of the permission is imminent[27].

9.19 As a result of the proposed new Tesco Extra store at Southgate, the **existing Tesco store at Northgate** will be vacated and is subject to a planning permission allowing its subdivision into four non-food retail units.

9.20 The scale of proposed development in Sleaford is such that it extinguishes any pressing quantitative need for further convenience or comparison retail over the short to medium term. Notwithstanding this, we are of the view that a qualitative benefit could be provided to the town through improvements to the existing Sainsbury's store at Southgate Shopping Centre. The store – which formerly traded as Somerfield – is dated in appearance and is not a of a size which allows Sainsbury's to stock an extended product range and compete 'head to head' with the proposed Tesco Extra. Accordingly, it may be appropriate in forthcoming years to consider the redevelopment potential of the Sainsbury's store and the adjacent shopping centre to provide a modern high-quality retail scheme which may incorporate significant food retail to help anchor the centre.

[27] Reported by Lincolnshire Echo (thisislincolnshire.co.uk), 31 October 2011

Recommendations

9.21 In Gainsborough, it is evident that the successful Marshall's Yard development has brought about a significant step-change in the way in which the centre is used and that, after taking into account committed convenience and comparison goods development (most notably the extant planning permission for the Tesco Extra store at Trinity Street), there is no quantitative need for additional convenience goods except in the very long term and no comparison goods need until the period approaching 2021. Even then, the need is relatively modest and it is considered that this could be satisfied either through a number of relatively small-scale developments within or at the edge-of the centre (subject to the availability of appropriate sites) or through the uplift in floorspace which would likely result through the wholesale redevelopment of the Lindsey Centre, together with adjacent land. Whilst any such opportunity could take a number of years to deliver, the benefits of redevelopment would be significant in opening up the town centre and establishing retail 'circuits' and greater footfall throughout the centre as a whole.

9.22 Whilst very significant convenience and comparison goods quantitative need has been identified in Lincoln under both population growth scenarios, it is evident that – subject to the successful delivery of the Lindongate opportunity – much of the comparison goods need in the period to 2021 would be extinguished. Given its location, Lindongate should clearly be the priority for additional facilities over the short to medium term. Whilst we are aware that there may be potential for the redevelopment of land at St Mark's Retail Park, it would be of benefit to the centre's overall vitality and viability if any such development were brought forward subsequent to the completion of Lindongate. Given the very significant overtrading which has been identified at Lincoln food superstores (in particular the Morrisons and Sainsbury's stores at Tritton Road, and the Tesco Extra at Wragby Road), sufficient need currently exists to support a further small to medium superstore at 2011 under both population growth scenarios. As would be expected, this need will then grow significantly to 2016 and 2021, by which time a number of new facilities are likely to be required. Whilst Lindongate itself may offer opportunity to accommodate a significant food superstore, it is likely that further appropriately located sites will need to be identified over the medium term.

9.23 The level of quantitative need for additional retail facilities in Market Rasen is relatively limited well into the medium term and, given the lack of obvious sites to accommodate any significant further development within or at the edge-of the centre, it is anticipated that additional facilities may be delivered through small-scale development proposals which will need to be considered in the context of the need identified in this study.

9.24 In Sleaford, it is evident that the key priority will be the facilitation of the link road which is required in order to 'unlock' the proposed Tesco and Bass Maltings developments. The successful delivery of the Tesco scheme will extinguish much of the convenience and comparison goods need identified under both population growth scenarios. Accordingly, it is considered that any further growth in the medium to long term may be delivered through the redevelopment and intensification of existing retail developments, such as the Sainsbury's store and adjacent smaller-scale retail units at Southgate Shopping Centre. Our analysis suggests that this superstore trades under company benchmark and, given its limited visibility and dated appearance, it is considered that there is potential to provide a significantly improved provision on the same site.

Future Leisure Provision

9.25 As evidence by the results of the household survey – which indicates that the Study Area secures a respectable market share of trips to the cinema, to ten-pin bowling and to bingo (accepting the role which is to be played by nearby centres such as Scunthorpe and Doncaster) – we consider that Central Lincolnshire's centres appropriately provide for the main leisure requirements of residents.

9.26 The popularity of the bingo hall has generally suffered throughout the country in recent years – partly as a consequence of the smoking ban – and we believe it unlikely that there will be significant interest in adding to the Study Area's principal bingo destination (Gala Bingo at the Waterside Centre in Lincoln) in the near future. This facility is adequately supported by smaller halls in Gainsborough, Sleaford and Woodhall Spa, and, outside the Study Area, by the Gala Bingo in Scunthorpe which serves the northern part of the Study Area.

9.27 The single modern multiplex cinema within the Study Area is the Odeon at Brayford Wharf, which provides almost 2,000 seats in total across nine screens. The provision is supplemented by the Kinema in the Woods in Woodhall Spa (which has two screens), the Playhouse Cinema in Louth (three screens) and Trinity Arts Centre in Gainsborough (which has one screen).

9.28 Recent research[28] indicates that throughout the UK there is an average of six screens per 100,000 people. Given that the Study Area population (under 'Scenario A') is estimated to be 464,391 people, this would suggest a requirement for around 28 screens. Whilst the fifteen screens provided across the study area would suggest that there may be potential to increase provision in the future, it should

[28] 2011 BFI Statistical Yearbook, August 2011

be noted that additional cinema provision is provided relatively close to the periphery of the Study Area at Boston, Cleethorpes, Doncaster, Grantham, Newark and Scunthorpe.

9.29 Indeed, focusing specifically on the central part of the Central Lincolnshire area which is most obviously served by Lincoln, and assuming the same direct area of influence as that considered in calculating Lincoln's retail market share at Section 7 of this report, we estimate that the around 215,828 people (representing the estimated population of Zones 2, 4, 5, 6, 7 and 8 under 'Scenario A' at 2011) would generally look to Lincoln when visiting the cinema. Assuming the same aforementioned average cinema screen provision of six per 100,000 population, the identified population would support around 13 cinema screens, which, while greater than the current level of provision, does not suggest a need for a further multiplex in the short to medium term. However, the emergence of digital cinema technologies in recent years has begun to make smaller auditoria more viable. Such screens can have a variety of uses and, given the low distribution costs of digital material, can screen a number of different films over a relatively short period of time. Accordingly, it may be feasible in the future for such additional provision to be attracted to Lincoln, Sleaford or Gainsborough.

9.30 The ten pin bowling requirements of the core part of the Study Area are met by the two facilities in Lincoln, which claim an extremely high proportion of such visits generated within the central Zones 2, 4, 5, 6, 7 and 8. Given the presence of further ten pin bowling facilities outside the Study Area at Cleethorpes, Doncaster and Scunthorpe, it is not considered that there is any pressing need for further such facilities within the catchment.

9.31 The household survey indicates that leisure needs relating to indoor sports/fitness, bars, pubs and restaurants are generally met locally with no obvious deficiencies in provision. Lincoln, with its theatres and concert halls, provides an obvious focus for the 'evening economy' and the importance of this growing to the city is recognised. In particular, the relatively recent openings of the Drill Hall (in 2004) and the Engine Shed (in 2006) have acted to increase the number of touring shows which are attracted to Lincoln and cater for the increasing number of students resident in the city.

9.32 Whilst the health check assessments suggest an apparent under-provision in terms of the overall floorspace dedicated to leisure service uses in some of the main town centres when compared with the national average (most obviously in Gainsborough), it is not considered that this is representative of any clear deficiency in any one centre's offer. However, in the case of Gainsborough, it is considered that future development opportunities – such as Elswitha Quarter – may provide added incentive for shoppers to 'linger' in the centre and link their trip with other experiences, rather than simply limit their trip to Marshall's Yard. A better integration between Marshall's Yard and the remainder of the centre may assist in bolstering the leisure service economy.

9.33 Accordingly, whilst it will be important to encourage and accommodate the future growth of this sector in appropriate locations in all four centres (in accordance with sustainable development principles), we do not consider that there are any significant weaknesses in the leisure service sector which remain to be addressed.

10.0 Future Retail Policy

10.01 Paragraph 23 of the NPPF requires local planning authorities to promote competitive town centre by, *inter alia*:

- Defining a network and hierarchy of centres that is resilient to anticipated future economic changes.
- Defining the extent of town centres and primary shopping areas, based on a definition of primary and secondary frontages in designated centres, and set policies which indicate which uses will be permitted in such locations.

10.02 Furthermore, it is also implicit in the NPPF that local planning authorities should consider setting threshold for the scale of edge of centre and out of centre development which should be the subject of an impact assessment.

10.03 Each of the above three requirements is considered below in relation to the four main centres in the context provided by this study.

Hierarchy

10.04 Given Lincoln's key role as a retail, commercial and cultural hub, it is recommended that a three tier hierarchy is set out for retail centres in order to inform the future focus of retail and town centre development. Our findings in respect of the role performed by the key service centres situated within the Lincoln Principal Urban Area are provided at Section 5 of this report.

10.05 Based on these findings, we recommend that the Core Strategy identifies a four tier hierarchy of centres[29], as follows:

- **City Centre:** Lincoln;
- **Main Town Centres:** Gainsborough, Market Rasen and Sleaford;
- **District Centres:** Within the Lincoln Principal Urban Area, District Centres will comprise Birchwood, The Forum (North Hykeham), Nettleham Road and Wragby Road/The Carlton Centre.

---

[29] The definition of centres (and, in particular, 'District' and 'Local' Centres) accords with that provided by Annex B of PPS4, which is set out at paragraph 5.27 of this report

- **Local Centres:** Within the Lincoln Principal Urban Area, Local Centres will comprise Burton Road, Bracebridge Heath, the Junction of Boultham Park Road and Skellingthorpe Road, Monks Road, Newark Road (Bracebridge), Old Hykeham (North Hykeham) and Waddington.

10.06 As previously stated, the status and designation of additional key service centres which are located outside of the defined Lincoln Principal Urban Area and outside the built up parts of Gainsborough and Sleaford will be the subject of a wider forthcoming review to inform the production of the forthcoming Site Allocations Development Plan Document.

Primary Shopping Areas

10.07 As indicated at paragraph 10.01 above, it is necessary for local planning authorities to identify the primary shopping area of existing centres as this forms the basis in terms of the application of the sequential approach to development. In this respect, Annex 2 of the NPPF provides the following definitions for the primary shopping area and for primary and secondary frontages.

- Primary Shopping Area
  'Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage.'

- Primary and Secondary Frontages
  'Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.'

10.08 In WYG's view, the identification and designation of shopping frontages is of limited merit and, in many cases, is being recognised as unnecessarily restrictive when seeking to introduce new uses into vacant town centre properties. A complementary mix of different uses helps to differentiate the high street from the offer provided by retail parks, and policies seeking to preclude non A1 retail uses may not act in practice to promote a centre's vitality and viability, particularly in the current economic climate. Accordingly, WYG recommends that it is advantageous and necessary to designate the extent of the four main centres' primary shopping areas (rather than primary and secondary frontages), in order to provide a focus for future growth and to act to define the centre boundary for the purposes of the future determination of retail planning applications.

10.09 Accordingly, we set out at Appendix 8 our recommended primary shopping areas for each of the four main centres, based upon our analysis of current A1 retail uses and our understanding of the manner in which each centre functions.

Thresholds

10.10 In accordance with national planning policy, it is appropriate to identify thresholds for the scale of edge-of-centre and out-of-centre retail and leisure development which should be subject to the assessment of the impact criteria set out by paragraph 26 of the NPPF. WYG does not consider that a blanket threshold is suitable for all types of centre across an administrative area. For example, a 500 sq.m convenience store (which could be operated by Tesco Express, Sainsbury's Local or similar) will likely have a greater impact on a small centre than a similar facility would on Lincoln. Therefore, in developing an appropriate policy relating to the assessment of impacts, it may be more appropriate to have a range of thresholds, depending upon which centre the development applies to.

10.11 Accordingly, policy could advocate a tiered approach whereby the threshold applied to retail and leisure planning applications at edge-of-centre and out-of-centre locations varies in relation to the role and function of the particular centre within its sphere of influence.

10.12 For the four main town centres, performing the role that they do, it is recommended that development proposals providing greater than 500 sq.m gross floorspace for retail or leisure uses in an edge or out-of-centre location should be the subject of an impact assessment. It is considered appropriate to reduce the threshold around District Centres to 300 sq.m gross and around Local Centres to 200 sq.m. In our experience, it will only generally be development of a scale greater than these thresholds which will lead to a 'significant adverse' impact, which could merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 27 of the NPPF.

10.13 Accordingly, an appropriate impact threshold policy could read as follows.

'An impact assessment will be necessary for planning applications for retail and leisure developments which are not located within a defined centre and which are not in accordance with an up to date development plan, where:

- **The proposal provides a floorspace greater than 500 sq.m gross; or**
- **The proposal is located within 500 metres of the boundary of a District Centre and is greater than 300 sq.m gross; or**

- **The proposal is located within 500 metres of the boundary of a Local Centre and is greater than 200 sq.m gross.'**

10.14 The proposed policy seeks to provide some certainty as to the areas to which the reduced threshold would apply, with the 500 metres considered to be an appropriate 'easy walking distance' which will broadly correlate with the core catchment of smaller centres.

Appendices

Appendix 1 – Detailed Health Check Assessment of Key Centres

Appendix 2 – Location of Central Lincolnshire Centres

Appendix 3 – Household Survey

Appendix 4 – Household Survey Results

Appendix 5 – Population Growth 'Scenario B' Methodology Note

Appendix 6 – Population Growth ‘Scenario A’ Capacity Tables

Appendix 7 – Population Growth ‘Scenario B’ Capacity Tables

Appendix 8 – Recommended Primary Shopping Area Boundaries for Main Centres