HEALTH CHECK ASSESSMENTS

Introduction

Set out below is WYG's assessment of the vitality and viability of the four main centres in North Kesteven, Lincoln and West Lindsey, namely: Gainsborough, Lincoln City Centre (and surrounding Retail Parks), Market Rasen, and Sleaford.

The Importance of Town Centres

These centres have an important role to play in Lincolnshire for serving the needs of the local community. They form a focal point for the predominantly rural area and provide a wide range of services that are accessible to the population, including retail, employment, leisure and education facilities.

The National Planning Policy Framework (March 2012) emphasises the need for local authorities to monitor the health of their town centres and determine how they are changing over time. Indeed, vital and viable town centres help to foster civic pride, promote local identity and contribute towards the aims of sustainable development.

Since the turn of the century, town centres nationally have witnessed high levels of vitality and viability with strong retail sales growth and the implementation of major town centre redevelopment schemes. Therefore, despite the growth of out-of-centre retail development, development activity has been focused within established centres primarily linked to the ambitious expansion plans of national department stores and key retailers such as Debenhams, Primark and Next. However, the recent recession has had an impact on consumer spending which in turn has had a negative impact on the vitality of the high street nationally. This has led to an increase in vacancy rates within many town centres, as retailers attempt to compete in a challenging market and shop owners struggle to let their stores to retailers.

Purpose of the Health Checks

It is important that these centres therefore remain competitive in light of increased competition and continue to attract shoppers, visitors and businesses. To achieve this, they must continually strive to build on their strengths, alleviate their weaknesses and continually improve the facilities they provide to the community. Successful town centres must also respond effectively to the changing needs and demand of their users.

Methodology

In order to accurately determine and assess the vitality and viability of the centres, an up-to-date evidence base has been created by WYG. The majority of the health check work was undertaken during the initial site visits of each of the centres in order to obtain the most up-to-date evidence and photographs, with this information being supplemented by a number of other sources, including:

- Experian Goad mapping to determine the floorspace, retailer representation and vacancies data;
- Previous retail and leisure studies of relevance to the centres;
- Desk-based research using data from several sources, including Venuescore's UK Shopping Venue Rankings (2010), Valuation Office Agency data (July 2008), Estates Gazette and Focus; and
- Experian MMG3 Mapping Software, to obtain the existing and future projections of the population and expenditure figures.

Health Check Indicators

The National Planning Policy Framework (NPPF) recognises the importance of local authorities preparing an up-to-date and sound evidence base to plan positively for town centre uses. In particular, it notes that this evidence base should be used to assess the role and function of town centres and the relationship between them, including any trends in the performance of the centres. Although the Framework does not provide a list of indicators which should be used to assess the health of a centre, the former Planning Policy Statement (PPS) 4: Planning For Sustainable Economic Growth (December 2009) had set out a number of key indicators which should be monitored on a regular basis in order to judge the health of a centre and its performance over time. The performance indicators outlined in PPS4 comprised the following:

PPS4 Health Check Indicator A1 – Diversity of Main Town Centre Uses

The A1 indicator in PPS4 makes reference to the need to review the diversity of main town centre uses (by number, type and amount of floorspace). This will include reviewing the different function of each unit to determine whether it represents a convenience, comparison, retail service, leisure service or financial and business service use. This information is obtained from Experian Goad, though it should be noted that smaller centres are less likely to have been surveyed by Experian. The analysis by WYG compares the proportion of different uses in each centre against the UK national average rates.

PPS4 Health Check Indicator A2 – The Amount of Retail, Leisure and Office Floorspace in Edge-of-Centre and Out-of-Centre Locations

In addition to reviewing the diversity of retail, leisure and office uses in a town centre, PPS4 also requires the review of the quantum of floorspace which exists in edge-of-centre and out-of-centre locations.

PPS4 Health Check Indicator A3 – Potential Capacity for Growth or Change

This indicator involves a review of the opportunities available for the centre to expand or consolidate, with this information typically measured in the amount of land available for new or more intensive forms of town centre development. The indicator also requires the review of any extant or emerging planning permissions for new town centre uses, both within and out of the centre. In addition, land which has been allocated within the development plan for town centre uses and which may have not come forward and/or which may be vacant will also be identified to assess any potential new development sites for town centre uses.

PPS4 Health Check Indicator A4 – Retailer Representation and Retailer Demand

PPS4 notes that Indicator A4 should be used to determine the existing retailer representation in a given centre and intentions to change representation within centres, including the demand of retailers wanting to come into a centre. The Focus database is used to identify commercial demand and retailer requirements for floorspace in town centres, whilst also recognising that this source only represents a limited number of operators. In addition, it should be noted that retailer demand can also be strongly influenced by the provision of new schemes being made available and effectively marketed. The analysis can also include a review of the number of national or independent retailers which are present within a centre, recognising that multiple retailers (such as Boots, Marks & Spencer and Debenhams) can act as anchor tenants in the centre, thus adding to its appeal and attracting a greater number of shoppers. Venuescore's UK Shopping Venue Rankings (2010) is used to identify the retail hierarchy of the centres, using a weighted scoring system which takes account of the presence in each location of multiple retailers.

PPS4 Health Check Indicator A5 – Shopping Rents

An analysis of the rate of Zone A shopping rental patterns in the primary shopping area of a town centre can provide an important indication of the overall strength and competitiveness of the centre. It is also important to review the movement of rental patterns over a few years and compare the figures with other nearby centres. PPS4 defines Zone A rents as the value for the first 6 metres of floorspace in retail units from the shop window. The data can be obtained from Estates Gazette and Focus, which uses Colliers CRE's data in respect of open market Zone A rents.

PPS4 Health Check Indicator A6 – Vacant Street-Level Property

The number of vacant units within a centre can provide a good indication of how a shopping centre is performing. However, care should be taken when interpreting figures. Vacancies can occur for positive as well as negative reasons; for example, the opening of a new retail centre elsewhere in a town may draw retailers from older properties or more peripheral areas of the city. Vacant units will therefore be found in even the strongest of town centres. For example, some properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or are simply not being actively marketed. However, they can be a useful indicator of the level of demand. Conversely, a low vacancy rate does not necessarily mean that a centre is performing well. For example, if there is a proliferation of charity shops and other uses not usually associated with a town centre it may be a sign of decline, particularly where these uses are located in prime locations.

PPS4 Health Check Indicator A7 – Commercial Yields

The commercial yield on non-domestic property data is obtained from the Valuation Office Agency (July 2008) and is deemed a reliable indicator of general health as it reflects investor confidence in a centre. The yield value is calculated by determining the open market rent of a unit as a percentage of its capital value. A low yield generally indicates that a town is considered to be attractive and, as a result, be more likely to attract investment than a town with high yields. PPS4 notes that the data can also demonstrate the confidence of investors in the long-term profitability of the centre for retail, office and other commercial developments.

PPS4 Health Check Indicator A8 – Land Values

The land value of a site and the length of time it may have remained undeveloped can provide an important indication as to how flexible the planning policies on the site can be and can help to inform planning decisions. However, it should be recognised that each parcel of land is often subject to a unique set of circumstances, for example physical or ownership constraints, which could affect the likelihood of the land being developed.

PPS4 Health Check Indicator A9 – Pedestrian Footfall

The analysis of the pedestrian footfall of a town centre is deemed as a key indicator of the vitality of the area. It is measured by recording the number and movement of people in different areas of a centre.

PPS4 Health Check Indicator A10 – Accessibility

PPS4 identifies that the accessibility of a centre is a key measure of its vitality and viability, noting that this will be determined by the ease and convenience of access by a choice of means of travel (including the quality, quantity and type of car parking; the frequency and quality of public transport services; and the range of customer origins served), quality of provision for pedestrians, cyclists and disabled people and the ease of access from the main arrival points to the main attractions in the centre.

PPS4 Health Check Indicator A11 – Customer and Residents' Views and Behaviour

Regular surveys are often used by local authorities to obtain the views of customers and residents in their area, with the findings often helpful for monitoring and evaluating the effectiveness of town centre improvements and for identifying future priorities. The survey can either be undertaken in the town centre or at home, with WYG regularly appointing survey companies to determine the pattern of retail and leisure expenditure patterns in the local area and to establish the degree of linked trips.

PPS4 Health Check Indicator A12 – Perception of Safety and Occurrence of Crime

The perception of the safety and security of a town centre can include a number of indicators, for example: the number of CCTV systems in operation; the crime levels; the police presence in the street; whether there is a Pub Watch/Street Watch scheme in operation; and any other issues associated with the night-time economy.

PPS4 Health Check Indicator A13 – Town Centre Environmental Quality

The final indicator requires a review of the quality of the town centre environment, including an assessment of the positive and negative factors affecting environmental quality, such as the provision of trees, open spaces and landscapes, as well as potential problems, including noise, clutter, litter and graffiti.

Hierarchy of Centres

This health check update report has been informed by a number of other specific information sources, including the following;

- City of Lincoln Retail and Town Centre Study 2007 (GVA Grimley)
- North Kesteven Retail and Commercial Leisure Study 2007 (Roger Tym & Partners)
- West Lindsey Retail and Commercial Leisure Study 2008 (Roger Tym & Partners)

WYG has drawn on the findings from these previous studies and, where possible, made comparisons with the data to note any historic changes in the centres. In addition, a consultation process has taken place with the key stakeholders and local representatives in the area. A telephone survey was also conducted by RMG Clarity to determine the retail shopping and leisure expenditure patterns of local residents.

The full list of centres reviewed as part of the Study (with the Local Plan settlement hierarchy/designation in brackets) is as follows.

City of Lincoln Local Plan (1998)

1. Lincoln City Centre (Sub-Regional Shopping Centre) – including St Marks and Tritton Retail Park
2. Birchwood (District Mixed-Use Centre)
3. Newark Road (Bracebridge) (District Mixed-Use Centre)
4. Junction of Boultham Park Road and Skellingthorpe Road (District Mixed-Use Centre)
5. Wragby Road (District Mixed-Use Centre)
6. Nettleham Road (District Mixed-Use Centre)
7. Monks Road (Identified as a potential District Mixed-Use Centre in the previous Retail Study)
8. Burton Road (Identified as a potential District Mixed-Use Centre in the previous Retail Study)

In addition, the following Retail Parks were reviewed as part of the WYG health check assessment in Lincoln;

9. The Carlton Centre
10. Lincoln West & Valentine Retail Park
11. Lindis Retail Park

West Lindsey Local Plan (2006)

12. Gainsborough (Town Centre)
13. Market Rasen (Town Centre)
14. Caistor (Town Centre)
15. Bardney (Primary Rural Settlement)
16. Cherry Willingham (Primary Rural Settlement)
17. Keelby (Primary Rural Settlement)
18. Nettleham (Primary Rural Settlement)
19. Saxilby (Primary Rural Settlement)
20. Scotter (Primary Rural Settlement)
21. Welton (Primary Rural Settlement)

North Kesteven Local Plan (2007)

22. Sleaford (Town Centre)
23. North Hykeham (Service Centre)
24. Bracebridge Heath (Service Village)
25. Billinghay (Service Village)
26. Heckington (Service Village)
27. Navenby (Service Village)
28. Ruskington (Service Village)
29. Metheringham (Service Village)
30. Waddington (Service Village)

The health check analysis by WYG has focused on an assessment of the performance of the existing largest centres of Gainsborough, Lincoln City Centre (and Retail Parks) Market Rasen, and Sleaford. A comprehensive and detailed evidence base is available for these centres, with GOAD mapping providing the floorspace data which were needed to determine the diversity of use information. Original survey work was undertaken at the other smaller centres in order to determine the diversity of use and overall provision of services in these areas.

The following section summarises the key findings from the health check analysis, with the PPS4 indicator headings used to categorise the analysis and figures from the site visit and other evidence resources. It is then followed by an in-depth review of the vitality and viability for each of the four centres.

Table 1: Summary of the Centres

July 2011	Total No. of Outlets	Total Amount of Floorspace (sq m)
Lincoln City Centre	681	171,350
Gainsborough	199	52,600
Sleaford	196	38,110
Market Rasen	88	11,200
Lincoln West & Valentine Retail Park (Lincoln)	24	42,000
The Carlton Centre (Lincoln)	23	11,760
Lindis Retail Park (Lincoln)	14	22,260

Source: Site Visit, July 2011

PPS4 Health Check Indicator A1 – Diversity of Main Town Centre Uses

Table 2: Diversity of Use Figures of the Centres

July 2011	Convenience		Comparison		Retail Service		Leisure Service		Financial/Business Service		Vacant	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Gainsborough	18	9.0%	69	34.7%	25	12.6%	35	17.6%	22	11.1%	30	15.0%
Market Rasen	10	11.4%	30	34.1%	12	13.6%	18	20.5%	8	9.1%	10	11.4%
Lincoln City Centre	41	6.0%	264	38.8%	67	9.8%	144	21.1%	75	11.0%	90	13.2%
The Carlton Centre	3	13.0%	8	34.8%	5	21.7%	2	8.7%	1	4.3%	4	17.4%
Lindis Retail Park	1	7.1%	4	28.6%	3	21.4%	4	28.6%	1	7.1%	1	7.1%
Lincoln Valentine Retail Park & West	2	8.3%	15	62.5%	2	8.3%	2	8.3%	1	4.2%	2	8.3%
Sleaford	17	8.7%	66	33.7%	34	17.3%	36	18.4%	22	11.2%	21	10.7%
UK Average*	**-**	**8.6%**	**-**	**33.5%**	**-**	**13.2%**	**-**	**21.7%**	**-**	**11.0%**	**-**	**11.7%**

Source: Site Visit, July 2011
*UK Average Figure, Goad, April 2011

Table 3: Floorspace Figures of the Centres

July 2011	Convenience		Comparison		Retail Service		Leisure Service		Financial/Business Service		Vacant	
	sq m	%	sq m	%	sq m	%	sq m	%	sq m	%	sq m	%
Gainsborough	8,560	16.3%	25,820	49.1%	2,200	4.2%	7,280	13.8%	3,530	6.7%	5,210	9.9%
Market Rasen	2,160	19.3%	2,900	25.9%	860	7.7%	3,010	26.9%	1,280	11.4%	990	8.8%
Lincoln City Centre	10,550	6.2%	90,720	52.9%	7,610	4.4%	32,830	19.2%	13,550	7.9%	16,090	9.4%
The Carlton Centre	2,050	17.4%	6,000	51.0%	860	7.3%	490	4.2%	180	1.5%	2,180	18.5%
Lindis Retail Park	10,450	46.9%	8,720	39.2%	820	3.7%	1,130	5.1%	180	0.8%	960	4.3%
Lincoln Valentine Retail Park & West	6,480	16.3%	27,600	65.7%	1,580	3.8%	2,040	4.9%	640	1.5%	3,300	7.9%
Sleaford	4,920	12.9%	10,810	28.4%	4,530	11.9%	7,500	19.7%	5,500	14.4%	4,850	12.7%
UK Average*	**-**	**14.3%**	**-**	**36.9%**	**-**	**7.0%**	**-**	**22.7%**	**-**	**8.5%**		**9.8%**

Source: Site Visit, July 2011
*UK Average Figure, Goad, April 2011

HEALTH CHECK ASSESSMENTS
ANALYSIS OF PUBLISHED DATA SOURCES

PPS4 Health Check Indicator A4 – Retailer Representation and Retailer Demand

Regional Retail Hierarchy

Table 4 illustrates the position of the principal centres within the hierarchy of centres based on the Venuescore's UK Shopping Venue Rankings (2010). The index ranks 2,106 retail venues within the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlet centres) based on current retail provision. Towns and major shopping centres are rated using a scoring system which takes account of the presence in each location of multiple retailers – including anchor stores, fashion operators and non-fashion multiples.

Lincoln is classed as a major regional centre by Venuescore (2010) and is currently ranked 40th of retail venues surveyed, placing it within the top 2% of UK shopping venues. However, its ranking has dropped by 5 places since 2005, when it was ranked 35th.

The retail ranking of Gainsborough has improved significantly between 2005 and 2010, with an increase in its ranking from 546th in 2005 to 354th in 2010. This improvement can largely be attributed to the development of Marshall's Yard in 2007 which provided an additional 28 large retail units for (predominantly) national operators. Marshall's Yard currently contains a variety of multiple retail and leisure units, including: Prezzo restaurant, Carpet Right, New Look, Next, Wilkinson, Greggs and Specsavers.

North Hykeham was identified as a local centre in 2005, with a ranking of 1,222. However, it was not ranked in either the 2007 or 2010 Venuescore, which is reflective of its relatively small size. The Valentine Retail Park and Carlton Centre Retail Park in Lincoln were not ranked in the 2005 Venuescore survey, though their ranking improved by 70 and 100 places respectively between 2007 and 2010. The Valentine Retail Park includes a number of comparison retailers, including an Asda Living Store, TK Maxx and Next. The Carlton Centre, approximately 2.5km to the east of Lincoln city centre, accommodates several national retailers, including: Halfords, Pets at Home, Pound Stretcher and Lidl.

The ranking of the Tritton Road Retail Park in Lincoln has declined by 31 places between 2005-2010, from 1,282nd to 1,313th places. The Retail Park currently accommodates a number of comparison, leisure service and retail service units, including: PC World, Currys, Pets at Home, Halfords, Carpet Right and Starbucks.

Table 4: The Sub-Regional Shopping Hierarchy

Centre	Score	Location Grade	Rank 2010	Rank 2007	Rank 2005	Change in Rank 2005 - 2010
Nottingham	451	Major City	7	6	5	-2
Lincoln	**245**	**Major Regional**	**40**	**30**	**35**	**-5**
Doncaster	229	Regional	45	41	60	+15
Grimsby	196	Regional	65	47	56	-9
Scunthorpe	127	Sub-Regional	162	165	180	+18
Grantham	123	Sub-Regional	170	160	192	+22
Boston	102	Sub-Regional	224	220	294	+70
Retford	71	Major District	335	383	337	+2
Gainsborough	**68**	**Major District**	**354**	**611**	**546**	**+192**
Spalding	61	District	408	352	403	-5
Sleaford	**39**	**Minor District**	**615**	**526**	**581**	**-34**
North Hykeham	**18 (2005)**	**Local (2005)**	**-**	**-**	**1,222**	**-**
Valentine Retail Park, Lincoln	**17**	**Local**	**1,313**	**1,383**	**-**	**+70***
Tritton Road Retail Park, Lincoln	**17**	**Local**	**1,313**	**1,304**	**1,282**	**-31**
Carlton Centre, Lincoln	**14**	**Local**	**1,526**	**1,626**	**-**	**+100***

Source: Venuescore (2010), * Rank from 2007-2010

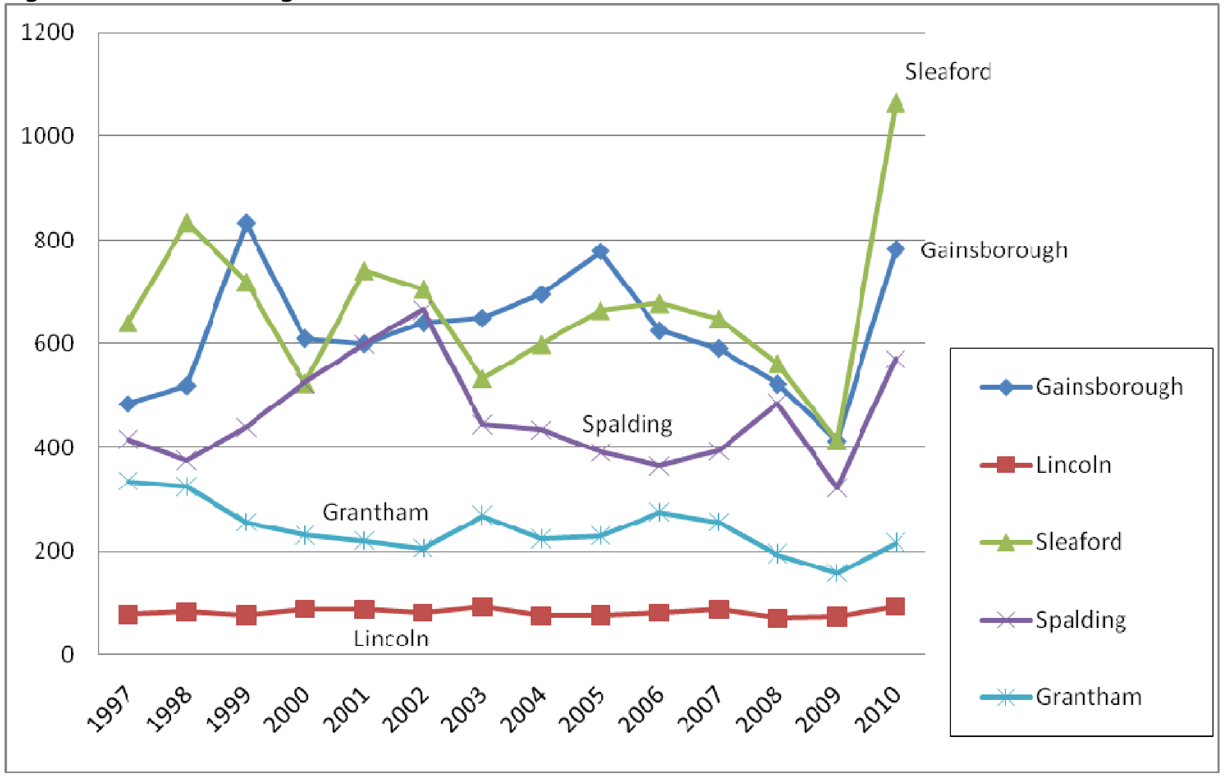
It should be noted that the following centres were not identified in the Venuescores rankings: Bardney, Billinghay, Birchwood (Lincoln), Burton Road (Lincoln), Caistor, Cherry Willingham, Heckington, The Junction (Boultham Park Road, Lincoln), Keelby, Lindis Retail Park (Lincoln), Market Rasen, Metheringham, Monks Road (Lincoln), Navenby, Nettleham, Nettleham Road (Lincoln), Newark Road (Lincoln), Ruskington, Saxilby, Scotter, Waddington, Welton and Wragby Road (Lincoln).

Retailer Demand/Ranking

Focus reports for the three centres of Gainsborough, Lincoln, Sleaford were reviewed to determine their retail ranking (based on retailer demand) between 1997 and 2010. It should be noted that Market Rasen and the other smaller centres in the study area do not have a Focus report, therefore details of the retail demand/ranking are not available. The Focus reports for Spalding and Grantham were also studied in order to compare how other nearby competing centres are performing.

Between 2009 and 2010, each of the five centres have experienced a reduction in their retail ranking, with Gainsborough and Sleaford being the centres which have performed the most poorly during this period. Lincoln, Grantham and Spalding have the highest overall retail ranking, with Lincoln ranked 93rd in 2010.

Figure 1: Retail Ranking



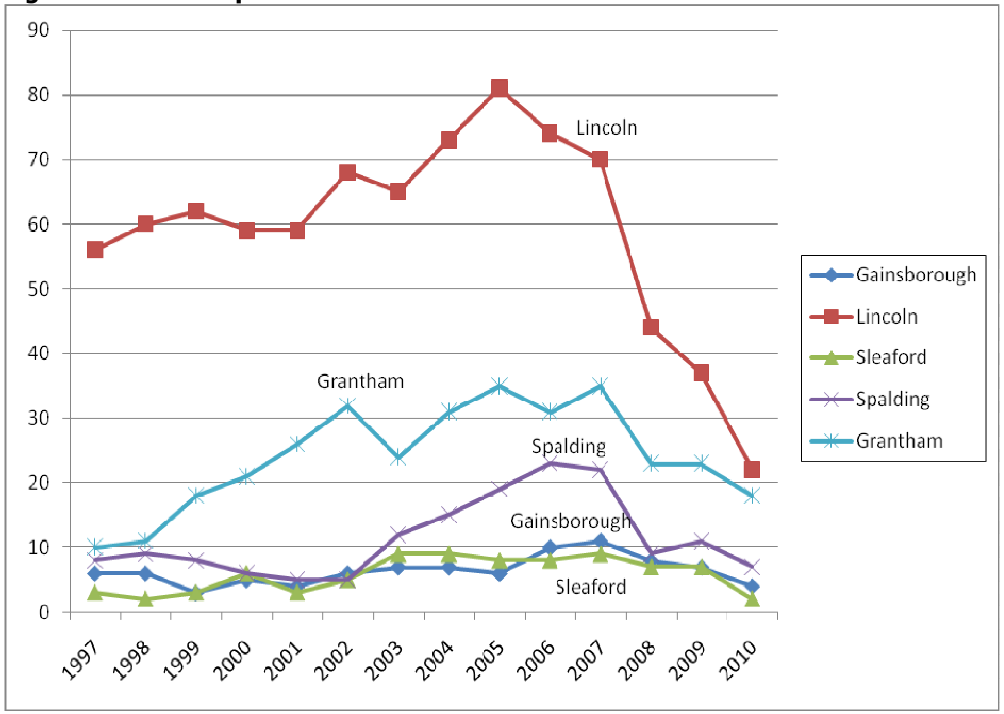
Source: Focus Report (July 2011)

Retailer Requirements

The Focus reports for the three centres of Gainsborough, Lincoln, and Sleaford were reviewed to determine the number of retailers who are seeking representation in each of the centres. It should be noted that Market Rasen and the other smaller centres in the study area are not the subject of a Focus report, therefore details of the retail requirements are not available. The Focus reports for Spalding and Grantham were also studied in order to compare how other nearby competing centres are performing.

It is evident that Lincoln, Grantham and Spalding are the centres which are subject to the greatest number of retailers seeking representation, with 22 retailers having a requirement in Lincoln in 2010. In contrast, Gainsborough and Sleaford only have a small numbers of retailers wishing to locate in these centres. Between 1997 and 2007, each of the centres experienced a general increase in requirements, though this, inline with national trends, has since declined for each centre.

Figure 2: Retail Requirements



Source: Focus Report (July 2011)

PPS4 Health Check Indicator A5 – Shopping Rents

Table 5 identifies the changes in Zone A rents in Gainsborough, Lincoln, Spalding and Grantham between June 2003 and June 2009. It should be noted that no data on Zone A rents was available in the Focus report for Sleaford. It is evident that the rental level for Lincoln is far in excess of the other nearby centres, reflecting its important role as a key retail centre. Between June 2008 and 2009, the centres of Lincoln, Spalding and Grantham experienced a reduction in the Zone A rents.

Table 5: Prime Pitch Zone A Rents (£/sq m)

Centre	June '03	June '04	June '05	June '06	June '07	June '08	June '09
Gainsborough	£215	£269	£430	£484	£484	£484	-
Lincoln	£1,399	£1,399	£1,453	£1,507	£1,507	£1,507	£1,399
Sleaford	-	-	-	-	-	-	-
Spalding	£484	£484	£484	£538	£592	£592	£538
Grantham	£646	£700	£700	£700	£700	£700	£592

Source: Focus Report based on Colliers CRE's opinion of open market Zone A rents

PPS4 Health Check Indicator A6 – Vacant Street – Level Property

Table 6 indicates the number of vacant units in each of the centres, with the Carlton Centre in Lincoln having the highest percentage of vacant units, both in terms of the number (17.4%) and amount of floorspace (18.5%). Whilst the vacancy floorspace rates in the centres of Gainsborough, Lincoln and Market Rasen are broadly similar to the national average figures, the number of vacant units in Gainsborough (15.0%) and Lincoln (13.2%) are above the national average of 11.7%.

Table 6: Vacant Units

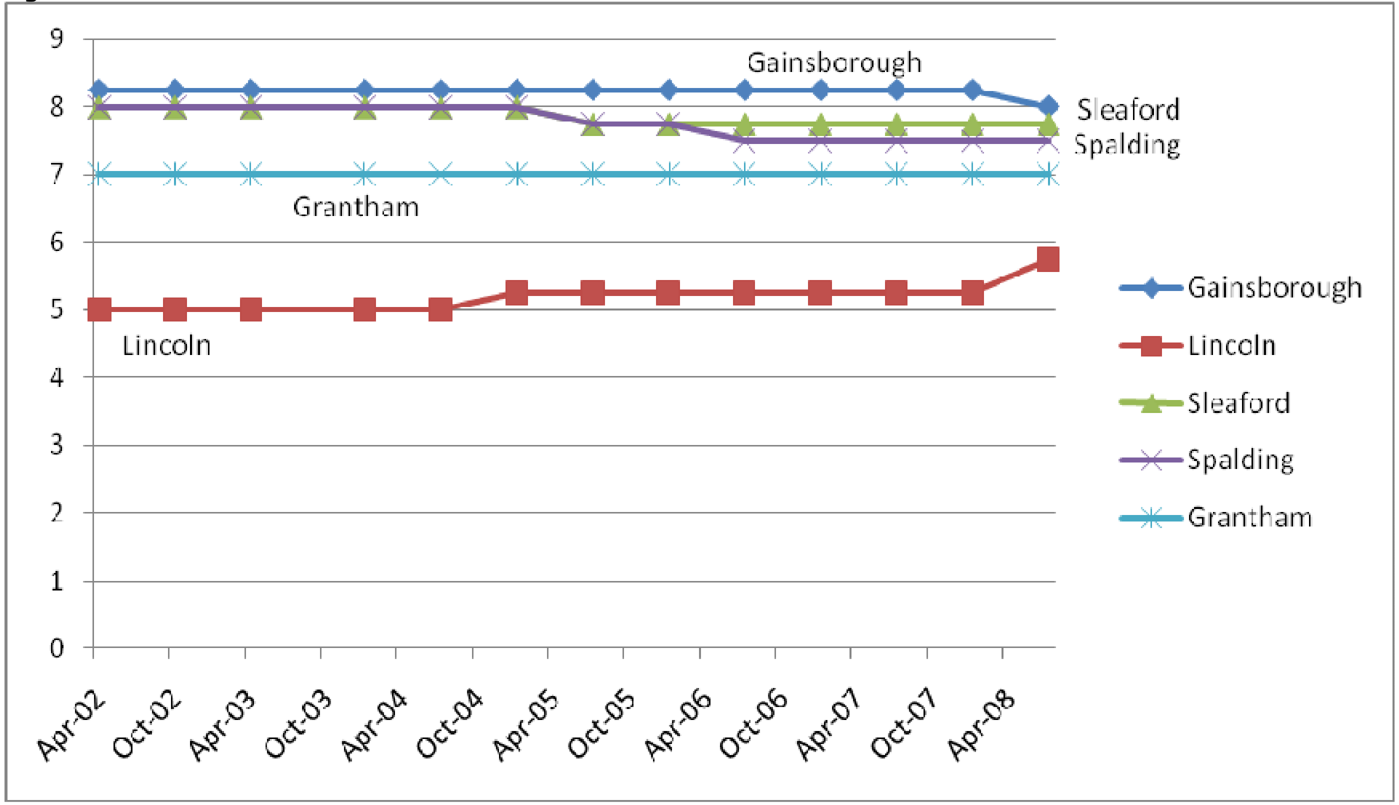
Centre	Total No. of Vacant Outlets	% of Outlets	Total Amount of Vacant Floorspace (sq m)	% of Floorspace
Gainsborough	30	15.0%	5,210	9.9%
Lincoln City Centre	90	13.2%	16,090	9.4%
The Carlton Centre	4	17.4%	2,180	18.5%
Lindis Retail Park	1	7.1%	960	4.3%
Lincoln West & Valentine Retail Park	2	8.3%	3,300	7.9%
Market Rasen	10	11.4%	990	8.8%
Sleaford	21	10.7%	4,850	12.7%
UK Average*	**-**	**11.7%**	**-**	**9.8%**

Source: Goad Survey and Site Visit (July 2011), *UK Average Figure, Goad (April 2011)

PPS4 Health Check Indicator A7 – Commercial Yields

The most recent commercial yields figures from the Valuations Office Agency (July 2008) demonstrate the confidence of investors in each of the five centres (Gainsborough, Lincoln, Sleaford, Spalding and Grantham). It is evident that, as Lincoln has the lowest yield, it would appear to have the greatest level of investor confidence, though it should be noted that the recorded yield declined slightly between February 2008 and July 2008. The commercial yield values in the nearby centres of Gainsborough and Grantham have remained relatively static, with the yields of Sleaford and Spalding both improving from May 2005.

Figure 3: Commercial Yield Value



Source: Valuations Office Agency (July 2008)

GAINSBOROUGH HEALTH CHECK ASSESSMENT

Status: Town Centre – West Lindsey Local Plan (2006)

Centre Overview

The market and industrial town of Gainsborough is the largest settlement in West Lindsey and is defined as a Town Centre in the West Lindsey Local Plan (2006). The main shopping area in Gainsborough is concentrated along the pedestrianised area of Market Place, Silver Street and Lord Street. Additional retail units are located on Church Street, Market Street and North Street. Marshall's Yard opened in April 2007 and accommodates the majority of the national operators in the town centre in large modern retail units. The Tesco store on Beaumont Street and the M&S Simply Food unit at Marshall's Yard are the main anchor foodstores in the town, with further foodstore provision in Gainsborough also available at the Aldi, Lidl and Morrisons units. The Wilkinson, DW Fitness and the Co-op Department Store units are three of the largest comparison retailers in the centre.

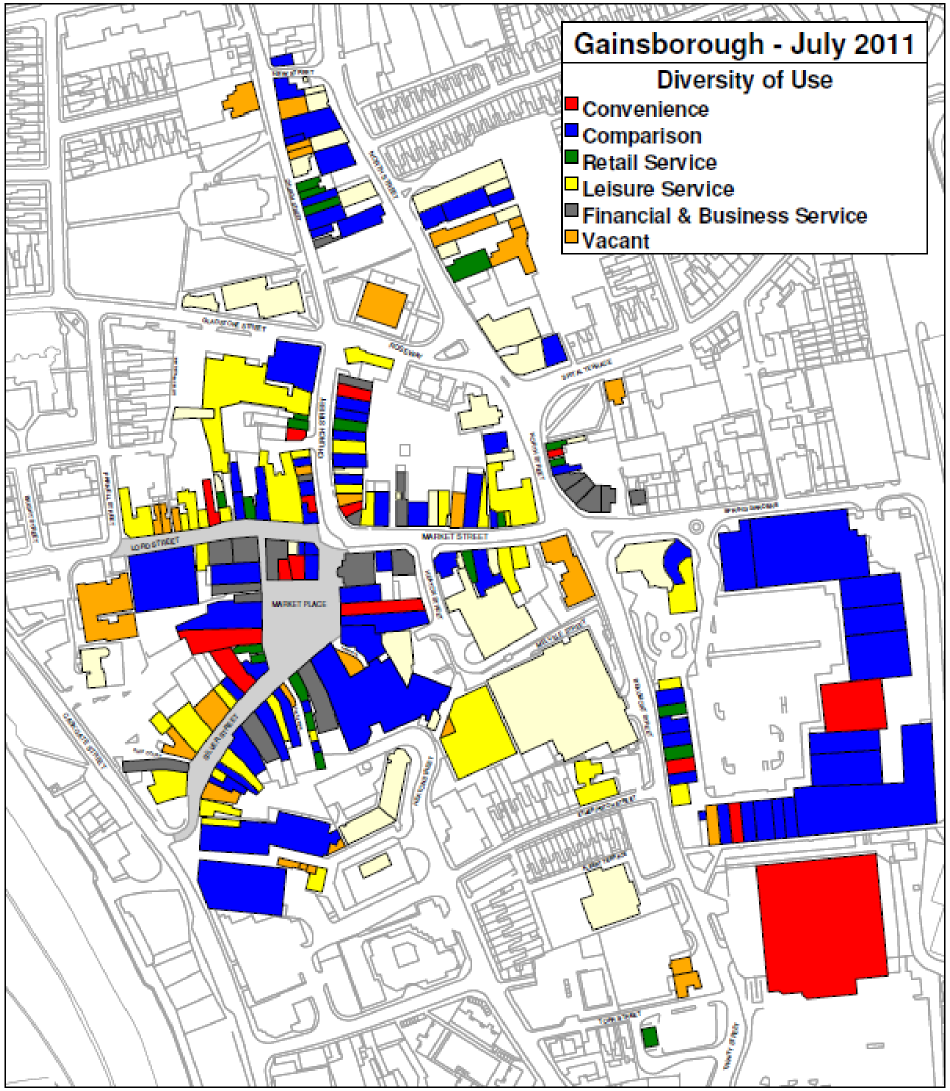
Gainsborough is located approximately 30km to the north-west of Lincoln City Centre, 35km to the west of Market Rasen and 55km to the north of Sleaford.

As Experian's latest GOAD survey of Gainsborough was completed in June 2010, a site visit of the town centre has been undertaken in order to ensure that the health check analysis could be compiled using the most up-to-date diversity of use and floorspace figures. This information has then been used to compare the relevant data of Gainsborough town centre with the UK national average figures and, where necessary, identify any potential issues with the centre.

Photographs of Gainsborough Town Centre (July 2011)

Photograph 1 (top left): Marshall's Yard
Photograph 2 (top centre): Vacant Unit, Spital Terrace
Photograph 3 (top right): B&M Bargains, Lord Street
Photograph 4 (bottom left): Silver Street
Photograph 5 (bottom centre): Tesco, Beaumont/Trinity Street
Photograph 6 (bottom right): Heron Foods and Boots, Market Place

Figure 4: Land Use Plan for Gainsborough Town Centre (July 2011)



Source: Site Visit (July 2011)

Table 7: Diversity of Uses in Gainsborough Town Centre (April 2006)

Number of Units			
	Number	Gainsborough	UK
Convenience	13	8.8%	9.1%
Comparison	75	51.0%	45.2%
Retail Service	14	9.5%	10.0%
Leisure Service	8	5.4%	14.4%
Financial and Business Service	17	11.6%	9.0%
Miscellaneous	1	0.7%	1.3%
Vacant	19	12.9%	11.1%
Total	**147**	**100%**	**100%**

Source: West Lindsey Retail and Commercial Leisure Study, RTP, 2008

Table 8: Previous Floorspace in Gainsborough Town Centre (April 2006)

Existing Floorspace			
	sq m	Gainsborough	UK
Convenience	-	-	-
Comparison	-	-	-
Retail Service	-	-	-
Leisure Service	-	-	-
Financial and Business Service	-	-	-
Miscellaneous	-	-	-
Vacant	-	-	-
Total	**-**	**- %**	**- %**

Source: West Lindsey Retail and Commercial Leisure Study, RTP, 2008

Table 9: Diversity of Uses in Gainsborough Town Centre (June 2010)

Number of Units			
	Number	Gainsborough	UK
Convenience	17	8.6%	8.8%
Comparison	68	34.5%	33.7%
Retail Service	24	12.2%	13.0%
Leisure Service	34	17.3%	21.7%
Financial and Business Service	22	11.2%	11.0%
Vacant	32	16.2%	11.3%
Total	**197**	**100%**	**100%**

Source: Experian GOAD Report, June 2010

Table 10: Previous Floorspace in Gainsborough Town Centre (June 2010)

Existing Floorspace			
	sq m	Gainsborough	UK
Convenience	8,510	16.5%	14.4%
Comparison	25,720	49.8%	37.1%
Retail Service	2,200	4.3%	7.0%
Leisure Service	7,150	13.8%	22.8%
Financial and Business Service	3,530	6.8%	8.5%
Vacant	4,530	8.8%	9.5%
Total	**51,640**	**100%**	**100%**

Source: Experian GOAD Report, June 2010

Table 11: Diversity of Uses in Gainsborough Town Centre (July 2011)

Number of Units			
	Number	Gainsborough	UK*
Convenience	18	9.0%	8.6%
Comparison	69	34.7%	33.5%
Retail Service	25	12.6%	13.2%
Leisure Service	35	17.6%	21.7%
Financial and Business Service	22	11.1%	11.0%
Vacant	30	15.0%	11.7%
Total	**199**	**100%**	**100%**

Source: Site Visit, July 2011
* UK Average Figure, Goad, April 2011

Table 12: Existing Floorspace in Gainsborough Town Centre (July 2011)

Existing Floorspace			
	sq m	Gainsborough	UK*
Convenience	8,560	16.3%	14.3%
Comparison	25,820	49.1%	36.9%
Retail Service	2,200	4.2%	7.0%
Leisure Service	7,280	13.8%	22.7%
Financial and Business Service	3,530	6.7%	8.5%
Vacant	5,210	9.9%	9.8%
Total	**52,600**	**100%**	**100%**

Source: Site Visit, July 2011
* UK Average Figure, Goad, April 2011

PPS4 Health Check Indicator A1 – Diversity of main town centre uses

The data in Tables 7 to 12 have been obtained from three sources, namely: the April 2006 GOAD report (as utilised by the West Lindsey Retail and Commercial Leisure Study, RTP, 2008), the June 2010 GOAD report; and the site visit in July 2011.

Convenience Units

Table 6 shows the diversity of use in Gainsborough town centre in July 2011, with the 18 convenience units accounting for 8,560 sq m of floorspace. The percentage of units (9.0%) and percentage of floorspace (16.3%) in use for the sale of convenience goods figures are both slightly above the respective national average figures of 8.6% and 14.3%. At present, the sector is dominated by several national operators, namely Tesco (Beaumont Street, 5,180 sq m), M&S Simply Food (Marshalls Yard, 990 sq m) and Heron Foods (Market Place, 490 sq m). Gainsborough also accommodates Aldi, Lidl and Tesco foodstores, though these are not included in the defined GOAD town centre boundary. There are also a number of other national convenience traders within the town centre, including Greggs bakers, Holland & Barrett and Timpson.

Comparison Units

Comparison traders in Gainsborough occupy 34.7% of all outlets in the town centre, which is slightly above the national average rate of 33.5%. In terms of the comparison goods floorspace provision in the centre, the 69 units account for 25,820 sq m of floorspace, with the percentage of floorspace in use for comparison goods (49.1%) some what above the national average figure of 36.9%. This can probably be attributed to the development of Marshall's Yard and the large comparison units which are located in this retail park. The largest comparison units in Marshall's Yard include Wilkinson (2,660 sq m), DW Sports Fitness (2,450 sq m) and Next (920 sq m). Other national comparison retailers in the town centre include the Co-op Department Store (Lindsey Centre, 2,100 sq m), Boyes (Heaton Street, 1,380 sq m) and Argos (Silver Street, 1,330 sq m). The smallest comparison trading units are concentrated along Church Street and Lord Street, with these units occupied by small independent traders, including clothing, jewellery and gift stores.

Gainsborough outdoor market is held every Tuesday and Saturday and is located along the pedestrianised area of Market Place and Silver Street. The market stalls sell a range of convenience and comparison goods, including clothing and homeware goods, with several stalls also selling hot food and refreshments (defined as leisure service goods).

Retail Services

Retail services, which comprise such uses as hairdressers, dry cleaners and petrol filling stations, account for 12.6% of outlets (25 units) and 4.2% of floorspace (2,200 sq m) in Gainsborough, which compares to respective national averages of 13.2% and 7.0%. 'Health and beauty' traders are particularly dominant in this sector, with a total of 11 such businesses, followed by opticians (four) and travel agents (three). There is a Post Office which is located in the Lindsey Centre. The retail service units tend to operate from small units in the town centre and include a variety of retailers, including N Manning motors (North Street, 300 sq m), Co-op Funeral Care (North Street, 270 sq m), Tesco filling station (Beaumomt Street, 80 sq m) and Mila hair salon (Church Street, 30 sq m).

Leisure Services

Leisure services, as defined by Experian GOAD, include uses such as restaurants, cafes, bookmakers and public houses. Gainsborough is under-provided for in terms of the proportion of such outlets in comparison to the national average (17.6% compared to 21.7%). Similarly, the proportion of floorspace occupied (13.8%) is below the national average (22.7%). The most common types of leisure service in Gainsborough town centre are take-aways and public houses which each occupy eight units and 630 sq m (take-aways) and 2,190 sq m (public houses) of floorspace. Gainsborough also accommodates State Cinema (Church Street, 590 sq m) and Teddys Amusements Arcade (Silver Street, 200 sq m). A number of national leisure operators are located in the town centre, including Costa, Bet Fred, Ladbrokes and William Hill.

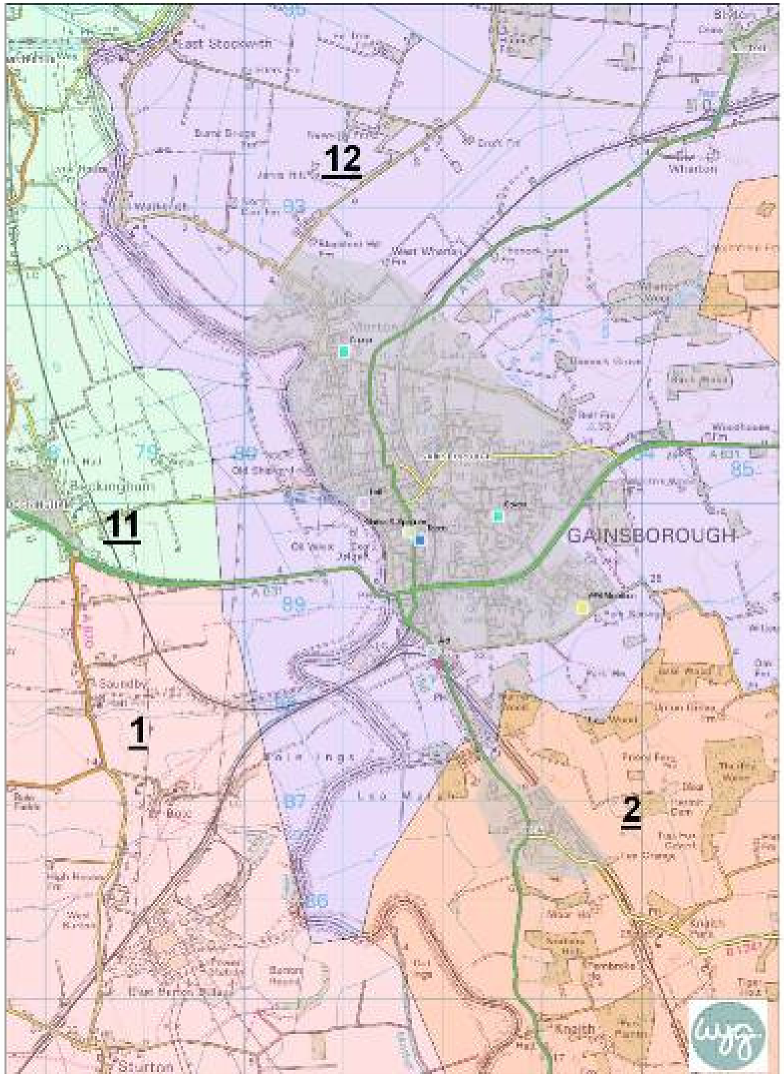
Financial and Business Services

In terms of financial and business services in Gainsborough, the proportion of outlets occupied by such uses (11.1%) is commensurate to the national average figure (11.0%). Similarly, the proportion of floorspace occupied by such uses in Gainsborough (6.7%) is below the national average level (8.5%). There are a total of seven retail banks in the town centre, including Lloyds TSB, Barclays and HSBC, with five property service units. The financial and business service sector units are predominantly grouped together towards the Market Street and Market Place.

Non-Retail Units

In addition to the retail service on offer within Gainsborough, there are a number of non-retail uses, including: five works/warehouses/factories, four offices, and three government and municipal buildings. The former West Lindsey District Council offices on Caskgate/Lord Street (940 sq m) have remained vacant since the relocation of the Council to new premises at Marshall's Yard.

Figure 5: Gainsborough (Zone 12)



PPS4 Health Check Indicator A2 -
The Amount of Retail, Leisure and Office Floorspace in Edge-of-Centre and Out-of-Centre Locations

As illustrated in Figure 5, the following supermarkets are located in edge-of centre or out-of-centre locations in Gainsborough (floorspace figures from IGD, 2010): Lidl (Ropery Lane – 826 sq m net); Co-op (Queensway - 293 sq m gross); Morrisons (Heapham Road – 5,521 sq m gross); Co-op (Front Street - 152 sq m gross); and Aldi (Lea Road – 604 sq m net).

PPS4 Health Check Indicator A4 – Retailer Representation and Retailer Demand

National and Independent Retailers (Goad)

Gainsborough town centre accommodates a variety of independent and national retailers, with the development of Marshall's Yard in 2007 helping to attract multiple traders to the new large-scale purpose built Retail Park. Whist the eastern section of the town centre is to some degree dominated by these larger units, the local independent traders are continuing to operate from the smaller units along Lord Street/Market Street/Church Street. In terms of the financial and business service sector, Gainsborough appeared to be well represented by the main High Street names, including Nationwide, Santander and HSBC. There are also a limited number of national leisure operators in Gainsborough, for example Costa, William Hill and Subway.

Top 20 Retailers (Focus)

Focus identified in 2009 the 'Top Twenty Retailers' which are derived from ORC Data Service's ranking of the top 20 comparison goods multiples according to its forecast of average town centre sales for individual retailers within Great Britain. Noting that Woolworths and Rosebys have subsequently gone into administration, Gainsborough town centre accommodates eight of the 'Top Twenty Retailers' identified by Focus.

Table 13: Top 20 Retailers

Rank	Retailer
1	**Boots**
2	Marks & Spencer
3	**Argos**
4	~~Woolworths~~
5	Debenhams
6	John Lewis
7	**WH Smith**
8	BHS
9	**Next**
10	Dixons
11	**Superdrug**
12	Lloyds Pharmacy
13	**Wilkinson**
14	**Co-op Department Stores**
15	Primark
16	**New Look**
17	HMV
18	Dorothy Perkins
~~19~~	~~Rosebys~~
20	Waterstones

Source: Focus (2009)

Retailer Demand/Ranking (Focus database)

The retail ranking (based on retailer demand) of Gainsborough fluctuated considerably between 1997 and 2005, from a low of 832nd in 1999 to a peak of 484th in 1997. In subsequent years, its ranking improved gradually, though between 2009 and 2010 its ranking was reduced from 413th to 782nd in 2010.

Table 14: Retail Ranking/Demand

Centre	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Gainsborough	484	519	832	610	600	640	649	695	778	625	591	522	413	782

Source: Focus (July 2011)

Retailer Requirements (Focus database)

As noted in Table 15, in 2010 there were four retailers seeking representation in Gainsborough, namely; one comparison retailer (the Card Factory, 93 sq m to 186 sq m) and three leisure retailers, namely Premier Inn (929 sq m to 4,645 sq m), McDonalds (330 sq m) and KFC (116 sq m to 279 sq m).

Table 15: Retail Requirements

Centre	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Gainsborough	6	6	3	5	4	6	7	7	6	10	11	8	7	4

Source: Focus (July 2011)

Retail Rankings (Venuescore)

As noted in Figure 1, Gainsborough has improved its retail ranking, rising from 546th in 2005 to 354th in 2010. The development of Marshall's Yard in 2007 has created additional large-scale retail and leisure floorspace in the east of Gainsborough town centre, attracting national operators including Next and Marks & Spencer Simply Food.

PPS4 Health Check Indicator A5 – Shopping Rents

Table 16 identifies the changes in Zone A rents in Gainsborough between 2003 and 2009. The Zone A Rents in Gainsborough are below the other nearby competing centres of Lincoln, Spalding and Grantham, with a Zone A rent of £484 per sq m charged in June 2008. No data was available for Zone A rental values for Gainsborough in 2009.

Table 16: Prime Pitch Zone A Rents (£/sq m)

Centre	June '03	June '04	June '05	June '06	June '07	June '08	June '09
Gainsborough	£215	£269	£430	£484	£484	£484	-

Source: Focus Report (2011) based on Colliers CRE's assessment of open market Zone A rents

A review of the properties to rent in Gainsborough via Estates Gazette (July 2011) identified a variation in the current rental values (nb. total unit floorspace rental figure and not Zone A rental value), dependent on their location and building type. These units included: 31 Lord Street, which is seeking to achieve a rent of £250/sq m (20 sq m, £5,000 per annum); 25 Silver Street, which is seeking to achieve a rent of £182/sq m (151 sq m, £27,500 per annum); Unit 4 The Lindsey Centre, which is seeking to achieve a rent of £154/sq m (130 sq m, £20,000 per annum) and 10 Silver Street, which is seeking to achieve a rent of £100/sq m (240 sq m, £24,000 per annum).

PPS4 Health Check Indicator A6 – Vacant Street-Level Property

The site visit in July 2011 found that the 30 vacant units in Gainsborough accounted for 5,210 sq m of the total floorspace in the town centre. The rate of vacant outlets (15.1%) was above the national average rate of 11.7%, whilst the actual proportion of total floorspace (9.9%) is also just above the UK average figure (9.8%).

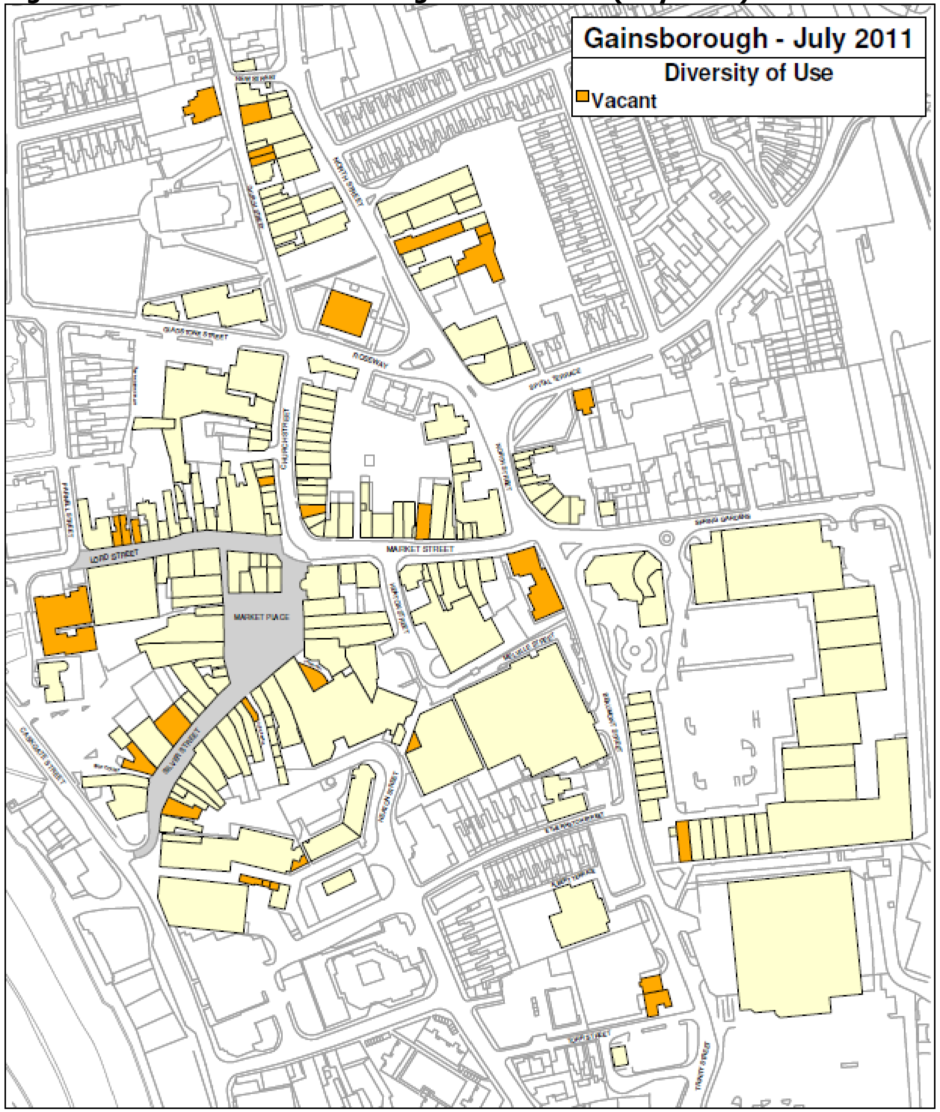
Table 17: Vacancies in Gainsborough (July 2011)

Vacancy Figures			
	Total	**Gainsborough (%)**	**UK (%)**
No. of Outlets	30	15.0%	11.7%
Floorspace (sq m)	5,210	9.9%	9.8%

Source: Site Visit (July 2011)

The vacant units are spread fairly evenly throughout the town centre, though concentrations of vacant units are evident in certain areas to the north of Church Street (Unit Nos 37, 80, 82 and 88-90), the west of Lord Street (Unit Nos 27, 29, 31) and Silver Street (Unit Nos 10-12, 16 and 25). There is only one vacant unit in Marshall's Yard, this being the former Julian Graves health food unit (150 sq m). The largest vacant unit in the town centre is the former Council offices building on Caskgate Street (940 sq m). Whilst the number of vacant units has decreased between June 2010 and July 2011, from 32 to 30 vacant units, the amount of floorspace has increased from 4,530 sq m to 5,210 sq m.

Figure 6: Vacancies in Gainsborough Town Centre (July 2011)



Source: Site Visit (July 2011)

PPS4 Health Check Indicator A7 – Commercial Yields

The commercial yield value of units in Gainsborough remained static at 8.25% between April 2002 and January 2008, improving to a yield of 8.00% in July 2008, suggesting an increase in investor confidence in the town centre. However, it is surprising to note that the retail yields have not improved further as a result of the Marshall's Yard development, whilst also recognising that the most recent commercial yields figures from the Valuation Office Agency date from July 2008.

PPS4 Health Check Indicator A9 – Pedestrian Footfall

A general pedestrian flow count was recorded during the site visit to Gainsborough in order to identify those areas of movement with a high or low pedestrian footfall. Marshall's Yard appeared to be an extremely popular retail destination, with high flows of activity from the car park in the centre of the Yard to the surrounding retail units and the Tesco store. It was clear that the pedestrianised areas of Lord Street, Market Place and Silver Street were also popular routes for pedestrians and shoppers. It was noted that there was limited pedestrian activity on Church Street and North Street.

PPS4 Health Check Indicator A10 – Accessibility

Road Access: The A159 is the main access road in Gainsborough Town centre, with medium-level traffic flows noted on this route. Reasonably good access links are also available to the other outlying major centres of Doncaster (33km) and Lincoln (40km).

Car Parking: There is a plentiful supply of car parking within Gainsborough town centre, with the principal facilities comprising the multi-storey car park on Melville Street (480 spaces), Marshalls Yard (334 spaces), North Street (90 spaces), Caskgate Street (80 spaces), Roseway (63 spaces) and Silver Street (40 spaces). The previous West Lindsey Retail and Commercial Leisure Study (Roger Tym & Partners, September 2008) identified that Marshall's Yard offered free parking for up to 2 hours, though this is no longer the case, with parking now costing 50p for up to 2 hours, £1 for up to 4 hours, but with free parking available on Sundays and Bank Holidays. In addition, approximately 350 free car parking spaces are available for customers of the Tesco store on Beaumont Street.

Public transport: The town centre benefits from particularly good accessibility by public transport, with Lea Road railway station being located to the south of the town centre (Gainsborough Central railway station to the east of the town centre principally serves a rail freight line). The bus station at Caskgate Street offers services to Lincoln, Market Rasen and the surrounding outlying centres, with bus pick up points located along the main routes in the town centre.

PPS4 Health Check Indicator A12 – Perception of Safety and Occurrence of Crime

The Gainsborough Shopwatch and Pubwatch schemes help to reduce anti-social behaviour and other incidents by providing radio contact for owners with the CCTV operation system in the town centre.

PPS4 Health Check Indicator A13 – Town Centre Environmental Quality

Gainsborough is an attractive town centre, with the development of the modern and large-scale retail and leisure facilities at Marshall's Yard to the east of the town providing a popular and well-kept destination for visitors to the area. The high quality scheme has created an attractive and popular retail destination which accommodates numerous national operators, including Wilkinson, Halfords and Next. In contrast, the pedestrianised areas of Silver Street, Market Place and Lord Street appear to have suffered from a decline in pedestrian activity and a number of buildings appear to look slightly tired, despite recent investment in the public realm, as a result of trade shifting to Marshall's Yard. This area contains a variety of building styles and designs, with many of the units small in size in comparison to Marshall's Yard. The overall environmental quality of the town centre on the day of the site visit was quite good, with little evidence of litter, vandalism or graffiti.

LINCOLN CITY CENTRE HEALTH CHECK ASSESSMENT

Status: City Centre – City of Lincoln Local Plan (1998)

Centre Overview

The historic city of Lincoln is an important regional centre, acting as a key employment and retail destination in the East Midlands. The main shopping area in the city centre is concentrated in the pedestrianised area of north High Street, Cornhill, Saltergate and Guildhall Street. There is a variety of both national multiple and independent small-scale operators in the centre, with the main high-street chains evident in Lincoln, including Marks & Spencer, Primark and House of Fraser. In addition, St Marks Retail Park, St Marks Shopping Centre and Tritton Retail Park to the west of the town centre accommodate a number of national retail and leisure operators, including Currys, Lidl, Starbucks, BHS and Homebase.

Lincoln city centre is located approximately 30km to the south-east of Gainsborough, 30km to the north of Sleaford and 25km to the south-west of Market Rasen.

The most recent Experian GOAD survey of Lincoln city centre was completed in February 2011. In order to obtain the most up to date diversity of use and floorspace figures, a site visit was conducted by WYG in July 2011. The information from the site visit has then been used to compare the relevant data of Lincoln city centre with the UK national average figures and, if necessary, identify any potential issues with the centre.

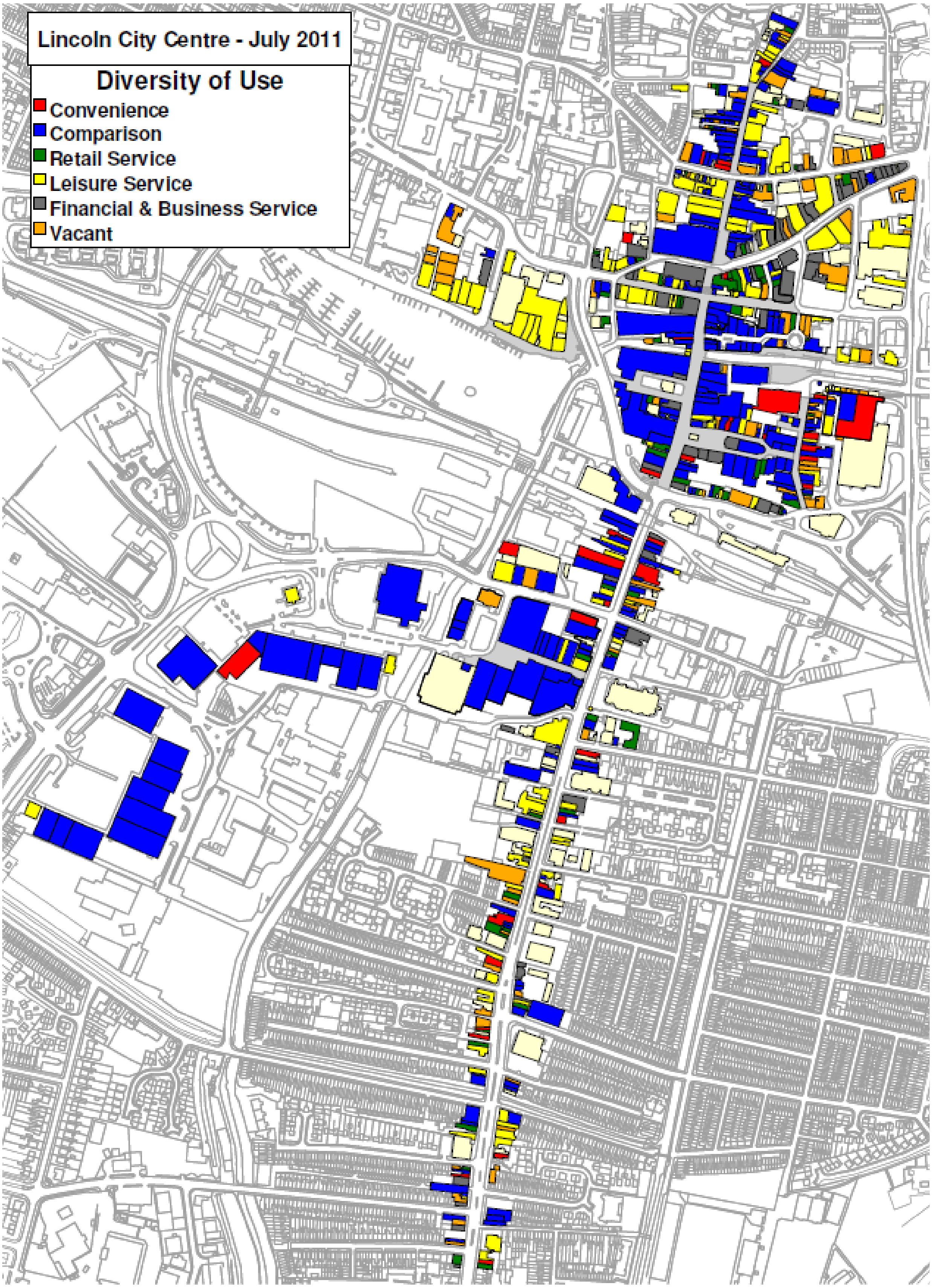
Photographs of Lincoln City Centre (July 2011)

Photograph 13 (top left): House of Fraser, High Street
Photograph 14 (top centre): Pizza Express, High Street/Grantham Street
Photograph 15 (top right): Ilkeston Travel Agency, High Street
Photograph 16 (bottom left): Primark, High Street
Photograph 17 (bottom centre): Brayford Wharf
Photograph 18 (bottom right): Coral, High Street

Photographs of Lincoln City Centre – Shopping Centres and Retail Parks (July 2011)

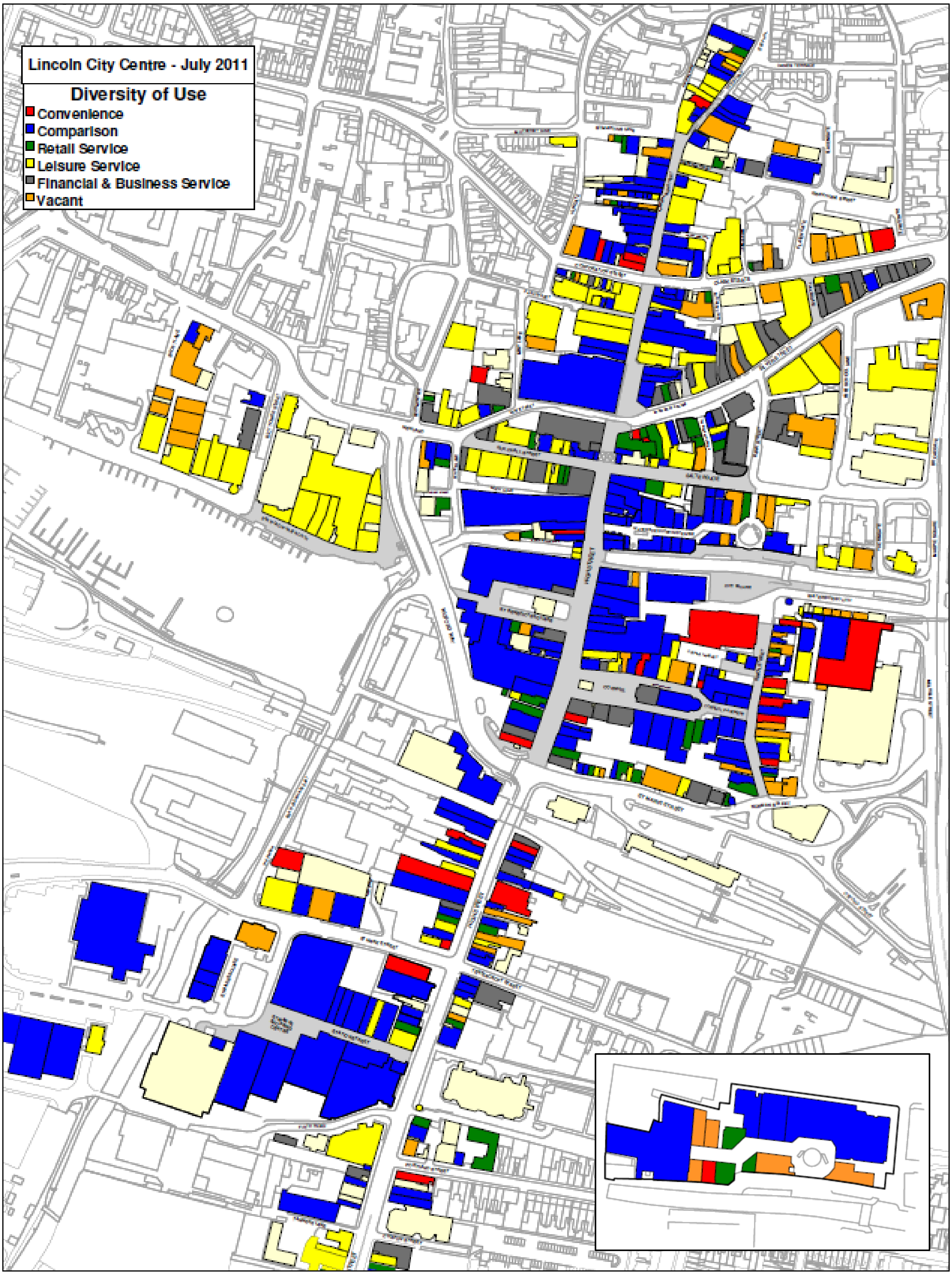
Photograph 19 (top left): The Mall Shopping Centre High Street
Photograph 20 (top centre): Waterside Shopping Centre, Saltergate
Photograph 21 (top right): Cornhill Market
Photograph 22 (bottom left): St Marks Shopping Centre
Photograph 23 (bottom centre): Tritton Retail Park
Photograph 24 (bottom right): Lidl, St Marks Retail Park

Figure 10: Land Use Plan for Lincoln City Centre (July 2011)



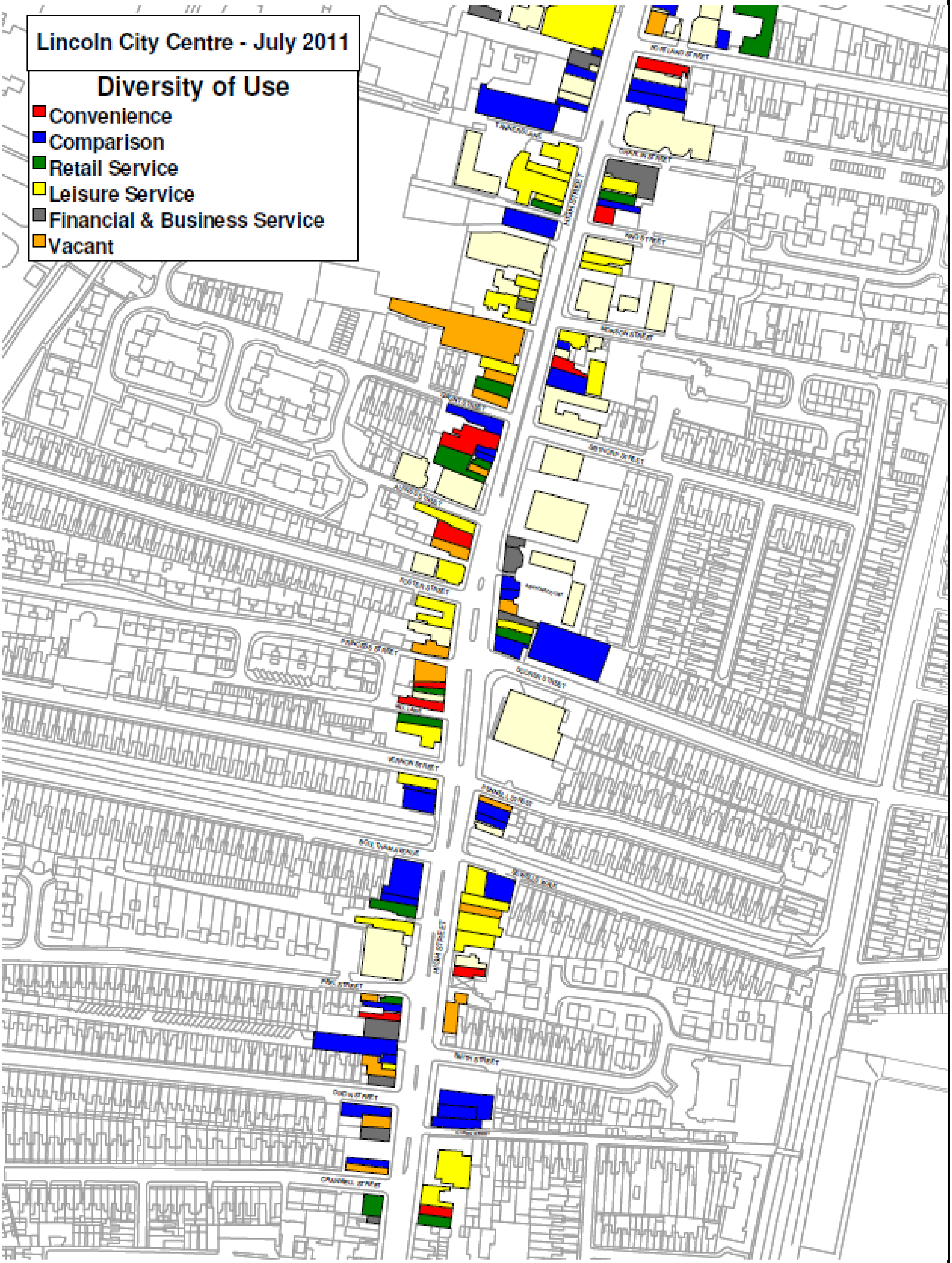
Source: Site Visit (July 2011)

Figure 11: Land Use Plan for Lincoln City Centre (July 2011) – Section 1 (North) and Lower Ground Waterside Shopping Centre



Source: Site Visit (July 2011)

Figure 12: Land Use Plan for Lincoln City Centre (July 2011) – Section 2 (South)



Source: Site Visit (July 2011)

PPS4 Health Check Indicator A1 – Diversity of main town centre uses

Table 24: Diversity of Uses in Lincoln City Centre (December 2005)

	Number of Units		
	Number	Lincoln	UK
Convenience	39	6.8%	9.1%
Comparison	309	54.0%	46.4%
Service	177	30.9%	32.6%
Vacant	40	7.0%	10.5%
Miscellaneous	7	1.2%	1.4%
Total	**572**	**100%**	**100%**

Source: Lincoln Retail and Town Centre Study (GVA Grimley, 2007)

Table 25: Previous Floorspace in Lincoln City Centre (December 2005)

	Existing Floorspace		
	sq m	Lincoln	UK
Convenience	-	-	-
Comparison	-	-	-
Service	-	-	-
Vacant	11,984	8.6%	9.0%
Miscellaneous	-	-	-
Total	**-**	**%**	**%**

Source: Lincoln Retail and Town Centre Study (GVA Grimley, 2007)

Table 26: Diversity of Uses in Lincoln City Centre (February 2011)

	Number of Units		
	Number	Lincoln	UK
Convenience	40	5.9%	8.7%
Comparison	267	39.1%	33.4%
Retail Service	66	9.7%	13.2%
Leisure Services	147	21.5%	21.7%
Financial and Business Services	77	11.3%	11.0%
Vacant	86	12.6%	11.7%
Total	**683**	**100%**	**100%**

Source: Experian GOAD Report, February 2011

Table 27: Previous Floorspace in Lincoln City Centre (February 2011)

	Existing Floorspace		
	sq m	Lincoln	UK
Convenience	10,420	6.1%	14.4%
Comparison	87,880	51.5%	36.9%
Retail Service	8,840	5.2%	7.0%
Leisure Services	33,450	19.6%	22.8%
Financial and Business Services	13,590	8.0%	8.5%
Vacant	16,560	9.7%	9.8%
Total	**170,740**	**100%**	**100%**

Source: Experian GOAD Report, February 2011

Table 28: Diversity of Uses in Lincoln City Centre (July 2011)

	Number of Units		
	Number	Lincoln	UK*
Convenience	41	6.0%	8.6%
Comparison	264	38.8%	33.5%
Retail Service	67	9.8%	13.2%
Leisure Services	144	21.1%	21.7%
Financial and Business Services	75	11.0%	11.0%
Vacant	90	13.2%	11.7%
Total	**681**	**100%**	**100%**

Source: Site Visit, July 2011
* UK Average Figure, Goad, April 2011

Table 29: Existing Floorspace in Lincoln City Centre (July 2011)

	Existing Floorspace		
	sq m	Lincoln	UK*
Convenience	10,550	6.2%	14.3%
Comparison	90,720	52.9%	36.9%
Retail Service	7,610	4.4%	7.0%
Leisure Services	32,830	19.2%	22.7%
Financial and Business Services	13,550	7.9%	8.5%
Vacant	16,090	9.4%	9.8%
Total	**171,350**	**100%**	**100%**

Source: Site Visit, July 2011
* UK Average Figure, Goad, April 2011

PPS4 Health Check Indicator A1 – Diversity of main town centre uses (Continued…)

The figures in Tables 24 to 29 have been obtained from three sources, namely: the Lincoln Retail and Town Centre Study (GVA Grimley, 2007); the February 2011 GOAD report; and the site visit in July 2011.

Convenience Units

Table 28 shows the diversity of use in Lincoln city centre in July 2011, with the 41 convenience units accounting for 10,550 sq m of floorspace. The percentage of units (6.0%) and floorspace in use for the sale of convenience goods (6.2%) are both below the respective national average figures of 8.6% and 14.3%. The convenience sector in the centre is dominated by the Co-op store in the City Square Centre (Sincil Street, 1,680 sq m) and the indoor market at City Square (1,530 sq m). Other convenience operators in Lincoln city centre include; Lidl (St Marks Retail Park, 1,260 sq m), Somerfield (170 High Street, 710 sq m), Iceland (334-337 High Street, 550 sq m) and Tesco Express (St Marks Shopping Centre, 410 sq m). In addition, there are a total of 10 bakers, four health food stores, three shoe repairs/key cutting units, two off licences, two butchers, two CTNs (Confectionery, Tobacconist and Newsagent) and one greengrocer/deli.

Comparison Units

Comparison traders in Lincoln city centre occupy 38.8% of all outlets in the town centre, which is slightly above the national average rate of 33.5%. In terms of the comparison goods floorspace provision in the centre, the 264 units account for 90,720 sq m of floorspace, with the percentage of floorspace in use for comparison goods (52.9%) significantly above the national average figure (36.9%). It is likely that this can largely be attributed to the inclusion of the large-scale comparison retail units at the Tritton Retail Park (12,810 sq m) and St Marks Retail Park (12,780 sq m) in the GOAD town centre boundary. Other large scale comparison units in the town centre include House of Fraser (226-231 High Street, 2,920 sq m), Debenhams (St Marks Shopping Centre, 2,860 sq m), Marks & Spencer (204-206 High Street, 2,540 sq m) and Primark (216-219 High Street, 2,350 sq m). Lincoln City Centre accommodates a significant number of national multiple operators, including Homebase, BHS, Comet, Argos, Boots and New Look. The vast majority of independent traders operate in the smaller retail units to the north and south of the town centre, particularly jewellery, clothing and second-hand stores.

PPS4 Health Check Indicator A1 – Diversity of main town centre uses (Continued…)

Retail Services

Retail services, which comprise such uses as hairdressers, dry cleaners and petrol filling stations, account for 9.8% of outlets (67 units) and 4.4% of floorspace (7,610 sq m) in Lincoln city centre, which compares to respective national averages of 13.2% and 7.0%. 'Health and beauty' traders are particularly dominant in this sector, with a total of 42 such businesses, followed by travel agents (seven) and opticians (six). The largest retail service units in Lincoln include Dexel tyre repairs and services (Scorer Street, 910 sq m), Co-op funeral services (Portland Street, 490 sq m) and Ilkeston travel agents (Silver Street, 350 sq m).

Leisure Services

Leisure services, as defined by Experian GOAD, include uses such as restaurants, cafes, bookmakers and public houses. Lincoln City Centre is slightly under-provided for in terms of the proportion of such outlets in comparison to the national average (21.1% compared to 21.7%). Similarly, the proportion of floorspace occupied (19.2%) is below the national average (22.7%). The most common types of leisure service in Lincoln are take-aways which occupy 38 units and 4,080 sq m of floorspace. Other key leisure uses include public houses (6,220 sq m), restaurants (5,560 sq m), cafes (4,120 sq m), bars (3,840 sq m) and casinos/betting offices (1,040 sq m). The development of Brayford Wharf has created several new leisure units which accommodate national operators, including the Odeon cinema, Costa, and Nandos restaurant.

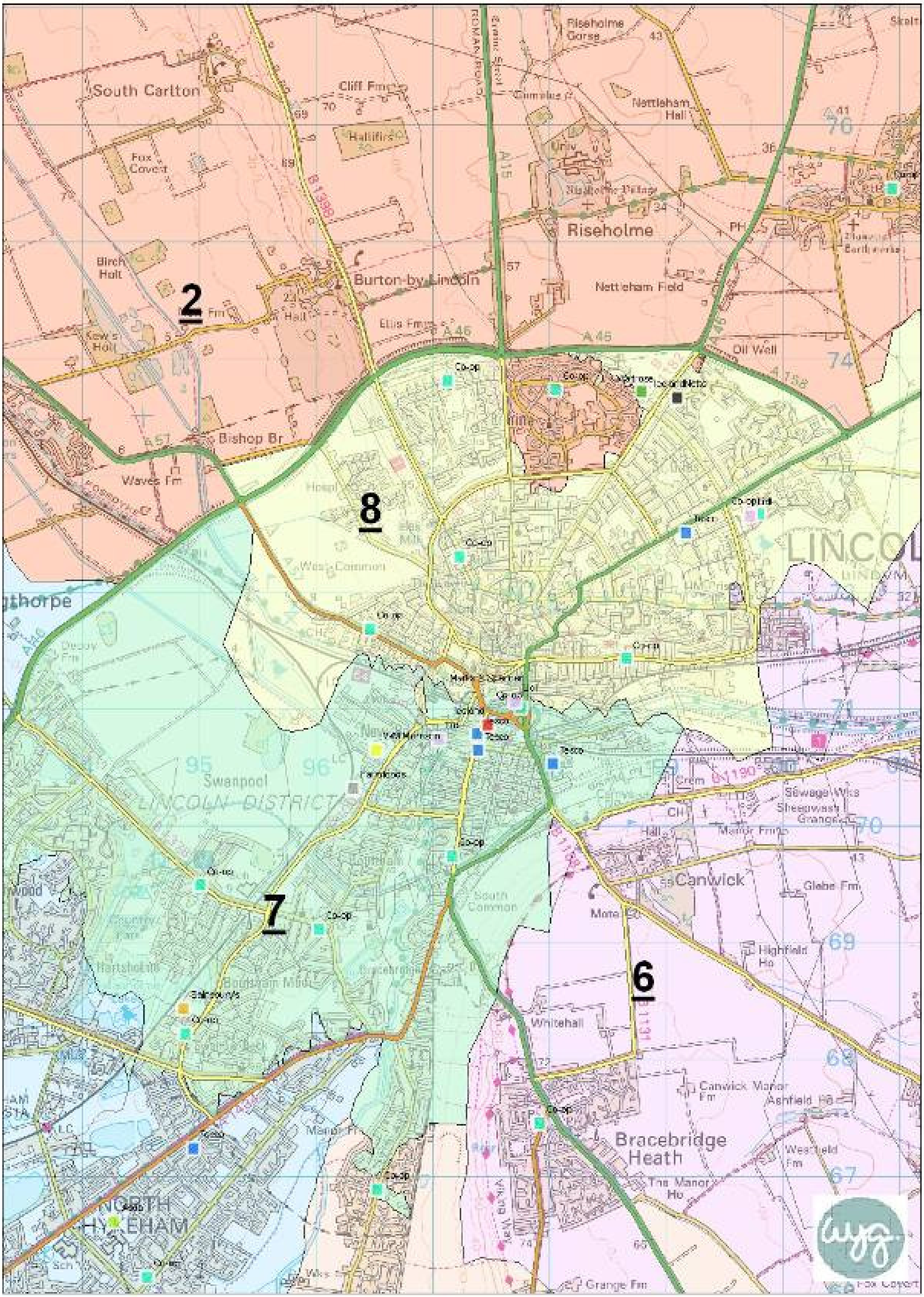
Financial and Business Services

In terms of the proportion of units occupied by financial and business services in Lincoln city centre, the proportion of outlets (11.0%) is exactly the same as the national average figure, with the proportion of floorspace occupied by such uses (7.9%) being slightly below the national average level (8.5%). The majority of the financial and business service units are located in the northern section of the centre, with a particular concentration along Silver Street (2,740 sq m). There are a total of 27 property service units and 18 banks in Lincoln, including Lloyds TSB, Barclays and HSBC.

Non-Retail Units

In addition to the retail service on offer within Lincoln city centre, there are a number of non-retail uses, including: 13 offices, nine religious institutions, eight medical service buildings and six government buildings. There are four multi-storey car parks comprising a total floorspace of 10,570 sq m.

Figure 13: Lincoln City Centre (Zones 7 and 8)



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PPS4 Health Check Indicator A2 -
The Amount of Retail, Leisure and Office Floorspace in Edge-of-Centre and Out-of-Centre Locations

In addition to the town centre retail, leisure and office floorspace, there are also a number of units located in edge-of-centre and out-of-centre locations in Lincoln. The following section therefore summarises the distribution and scale of these facilities.

As illustrated in Figure 13, there are several large foodstores located outside of Lincoln city centre, including the following which are studied in further detail later on in this health check report;

- Tesco at Wragby Road;
- Co-op at Birchwood;
- ASDA (former Netto), Iceland and Waitrose at Nettleham Road;
- Tesco Express at Newark Road; and
- Asda, Co-op and Tesco at North Hykeham.

Other large foodstores in an edge-of-centre or out-of-centre location in Lincoln include: Sainsbury's at Lindis Retail Park; Co-op and Lidl at The Carlton Centre; Morrisons and Farmfoods at Lincoln West/Valentine Retail Park (Tritton Road); and Tesco at Canwick Road. The Sainsbury's store in Lindis Retail Park, Tritton Road, to the south-west of Lincoln city centre opened for trading in 1991. It accommodates a gross floor area of 6,503 sq m (IGD, 2010) and a net sales area of 3,756 sq m. The Carlton Centre is located to the north-east of Lincoln city centre, and includes the Lidl (929 sq m net) and Co-op store (256 sq m net) units. The Morrisons store on Tritton Road is located to the south-west of the centre and has a gross floorspace of 6,755 sq m and a net sales area of 3,064 sq m. It opened for trading in 1992 and accommodates several small internal retail units in the store, including Johnsons dry cleaners, Specsavers and a Celebrations card shop. The Tesco store in the Canwick Road Trading Estate to the south-east of the city centre opened for trading in 1974 and has a gross floor area of 4,011 sq m and a net sales area of 2,465 sq m.

Further details about the Lindis Retail Park, Carlton Centre and Lincoln West/ Valentine Retail Park sites are outlined in the following section.

PPS4 Health Check Indicator A2 -
The Amount of Retail, Leisure and Office Floorspace in Edge-of-Centre and Out-of-Centre Locations (Continued…)

There are several retail parks located in edge-of-centre or out-of-centre locations in Lincoln which accommodate a number of comparison retail and leisure operators, namely: St Marks Shopping Centre, St Marks Retail Park, Tritton Retail Park, Lindis Retail Park, Lincoln West Retail Park, Valentine Retail Park and the Carlton Centre. Brayford Wharf. The majority of the bulky goods comparison units are dispersed along Tritton Road to the south-west of Lincoln city centre. The Carlton Centre is the exception, being located approximately 3km to the north east of the centre.

It should be noted that St Marks Shopping Centre, St Marks Retail Park and Tritton Retail Park are located within the boundary of the Lincoln city centre GOAD plan and have therefore been included as part of the town centre analysis.

Table 30: Diversity of Uses in Lincoln City Centre (July 2011)

Centre Name	Total No. of Outlets	Total Amount of Floorspace (sq m)	Key National Operators
St Marks Shopping Centre (Lincoln city centre)	24	15,600	Debenhams, New Look, Costa, Boots, Tesco Express, Mamas & Papas, Sports Direct, M&Co, JJB, Lakeland, Argos
St Marks Retail Park (Lincoln city centre)	13	16,880	Toys 'R' Us, Pizza Hut, Burger King, CSL Sofas, BHS, Lidl, Homebase
Tritton Retail Park (Lincoln city centre)	10	13,110	Comet, Halfords, SCS, Currys, PC World, Pets at Home, Carpet Right, Starbucks
The Carlton Centre	23	11,760	Co-op, Lidl, Dunelm Mill, Halfords, Boots, Post Office, Poundstretcher, Blockbuster
Lindis Retail Park	14	22,260	Sainsbury's, Matalan, Co-op Department Store, McDonalds, Blockbuster
Lincoln West Retail Park	5	6,590	B & M Home Store, Screwfix
Valentine Retail Park	18	35,350	Morrisons, B&Q, ASDA Living, Next, TK Maxx, Superbowl, Farmfoods, Barclays

Source: Site Visit (July 2011)

PPS4 Health Check Indicator A2 –

The Amount of Retail, Leisure and Office Floorspace in Edge-of-Centre and Out-of-Centre Locations (Continued…)

The Carlton Centre

In July 2011, the 23 units at the Carlton Centre accommodated a total floorspace of 11,760 sq m. The three convenience units in the Centre comprise a baker, Co-op store and Lidl supermarket. There has been a reduction in the number of comparison units between July 2010 and July 2011 from nine to eight units, with the former Focus DIY store (1,900 sq m) now vacant. The comparison sector is well represented by national retailers in the Carlton Centre, namely: Boots, Brantano footwear, Poundstretcher, Pets at Home, Dunelm Mill and Halfords. The five retail service units comprise two health and beauty units, Blockbuster, Co-op Travel and the Post Office. The 490 sq m leisure units comprise a McDonalds and an independent bar/restaurant on Alexander Walk. There is only one financial and business service unit in the Carlton Centre, namely the Norwich & Peterborough building society, following the closure of the Concept estate agency on Carlton Mews. The four vacant units comprise a total floorspace of 2,180, with an additional two vacant units recorded from the previous GOAD survey in July 2010, these being the former Focus DIY and Concept estate agent units. There are approximately 690 free car parking spaces for visitors to the Carlton Centre.

Table 31: Diversity of Uses and Floorspace in the Carlton Centre (July 2011)

The Carlton Centre				
	Number	**Diversity of Use (%)**	**Floorspace (sq m)**	**Floorspace (%)**
Convenience	3	13.0%	2,050	17.4%
Comparison	8	34.8%	6,000	51.0%
Retail Service	5	21.7%	860	7.3%
Leisure Service	2	8.7%	490	4.2%
Financial and Business Service	1	4.3%	180	1.5%
Vacant	4	17.4%	2,180	18.5%
Total	**23**	**100.0%**	**11,760**	**100.0%**

Source: Site Visit, July 2011

The granting of two recent planning applications at the Carlton Centre (LPA Ref. 2010/0857/F and 2010/0619/F) will create additional retail floorspace, with the site visit in July 2011 indicating that the development of these schemes was nearly complete.

Photographs of the Carlton Centre (July 2011)

Photograph 25 (top left): Halfords
Photograph 26 (top centre): Development Site
Photograph 27 (top right): Pound Stretcher
Photograph 28 (bottom left): Vacant Units
Photograph 29 (bottom centre): Co-op, Post Office and craft shop
Photograph 30 (bottom right): Lidl

Figure 14: Land Use Plan of the Carlton Centre (July 2011)

Source: Site Visit (July 2011)

PPS4 Health Check Indicator A2 -
The Amount of Retail, Leisure and Office Floorspace in Edge-of-Centre and Out-of-Centre Locations (Continued…)

Lindis Retail Park

The Lindis Retail Park is located approximately 5km to the south east of Lincoln city centre on Tritton Road (B1003). The large Sainsbury's store in the Retail Park contains a large comparison goods area, with 700 free car parking spaces provided for customers. There are four comparison units in the Retail Park, including Matalan (2,410 sq m) and Pets Corner (330 sq m). The Moorlands Centre comprises a 5,750 sq m Co-op Department store which sells a large variety of non-food goods, including furniture, clothes (including Dorothy Perkins), gifts, electrical goods and garden equipment. The unit also includes a small foodhall section, with free parking spaces available for approximately 400 cars. The three retail service sector units in Lindis Retail Park comprise Blockbuster (590 sq m), Co-op Travel (160 sq m, in the Moorlands Centre) and Sainsbury's filling station. There are also several leisure units, including a Sainsbury's café (400 sq m), Elite restaurant (400 sq m), McDonalds (200 sq m) and Dominos Pizza (130 sq m). There is one financial and business service unit, namely the Dream Doors building suppliers company in the Moorlands Centre. The single vacant unit at the Park is located next to the Blockbuster unit and comprises a floorspace of 960 sq m. The site visit in July 2011 identified that there has been no change recorded since the previous Goad survey in July 2010.

Approximately 1,500 free car parking spaces are available at Lindis Retail Park.

Table 32: Diversity of Uses and Floorspace in Lindis Retail Park (July 2011)

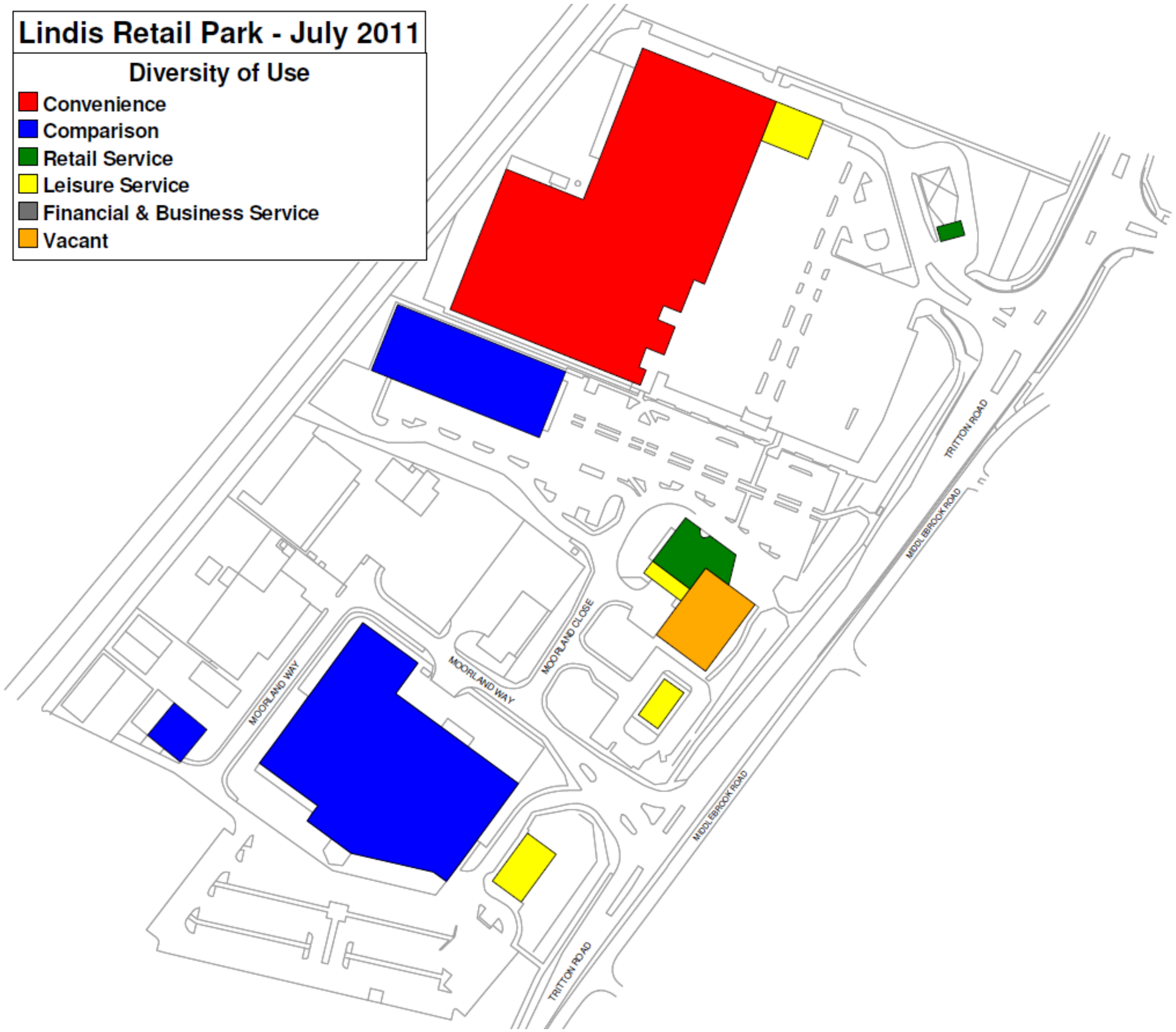
Lindis Retail Park				
	Number	**Diversity of Use (%)**	**Floorspace (sq m)**	**Floorspace (%)**
Convenience	1	7.1%	10,450	46.9%
Comparison	4	28.6%	8,720	39.2%
Retail Service	3	21.4%	820	3.7%
Leisure Service	4	28.6%	1,130	5.1%
Financial and Business Service	1	7.1%	180	0.8%
Vacant	1	7.1%	960	4.3%
Total	**14**	**100.0%**	**22,260**	**100.0%**

Source: Site Visit, July 2011

Photographs of Lindis Retail Park (July 2011)

Photograph 31 (top left): Sainsbury's
Photograph 32 (top centre): Vacant unit
Photograph 33 (top right): Matalan
Photograph 34 (bottom left): Co-op Department Store (Moorlands Centre)
Photograph 35 (bottom centre): Blockbuster
Photograph 36 (bottom right): McDonald's

Figure 15: Land Use Plan for Lindis Retail Park (July 2011)



Source: Site Visit (July 2011)

PPS4 Health Check Indicator A2 -
The Amount of Retail, Leisure and Office Floorspace in Edge-of-Centre and Out-of-Centre Locations (Continued…)

Lincoln West and Valentine Retail Park

The Lincoln West and Valentine Retail Park is located approximately 3.5km to the south east of Lincoln city centre on Tritton Road (B1003). The site comprises three large units in the northern section (B&Q, Morrison's and a works unit) on Beevor Street. A Superbowl bowling alley, Farmfoods and Tile Giant are located to the south, with access to these units available via Valentine Road. The nine units which comprise Valentine Retail Park include Asda Living, Next and TK Maxx and are located on the opposite side of Tritton Road to the Lincoln West Retail Park. A total of five leisure and comparison goods units are located on the Lincoln West site, namely; Fit Space, Screwfix, B&M Homestore, Claytons and Shah Furniture. Other retail units to the south of Valentine Retail include Wren and The Range which both sell household goods, a pub and Barclays bank. The two convenience sector units on the site comprise Farmfoods (520 sq m) and Morrisons (6,320 sq m) foodstores. The largest comparison units comprise the B&Q Supercentre (12,530 sq m), B&M Homestore (2,560 sq m), Asda Living (2,530 sq m) and Next (1,850 sq m).

Table 33: Diversity of Uses and Floorspace in the Lincoln West and Valentine Retail Park (July 2011)

The Lindis Retail Park				
	Number	Diversity of Use (%)	Floorspace (sq m)	Floorspace (%)
Convenience	2	8.3%	6,480	16.3%
Comparison	15	62.5%	27,600	65.7%
Retail Service	2	8.3%	1,580	3.8%
Leisure Service	2	8.3%	2,040	4.9%
Financial and Business Service	1	4.2%	640	1.5%
Vacant	2	8.3%	3,300	7.9%
Total	**24**	**100.0%**	**42,000**	**100.0%**

Source: Site Visit, July 2011

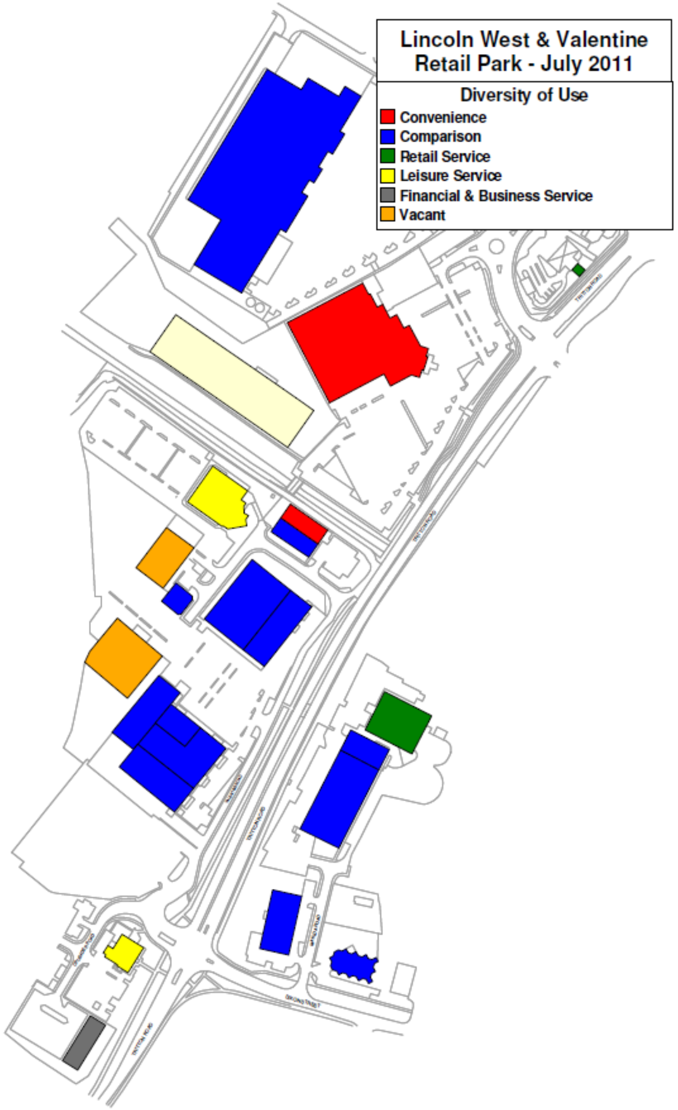
The site visit in July 2011 identified that there has been several changes since the previous Goad survey in July 2010, namely the Brantano shoes unit had been split to create an additional unit comprising Game and Carphone Warehouse. In addition, the former 1,420 sq m vacant unit at Valentine Retail Park is now a Lipsy clothes and Next Homes unit. The former construction site on Valentine Road is also now operating as the Wren and The Range stores, though the floorspace of these units is unknown and therefore not recorded in the above table.

There is a total of approximately 2,640 customer car parking spaces situated on the site, in the following locations: B&Q Store (1,100 spaces); Morrisons (770 spaces); Valentine Retail Park (550 spaces); Lincoln West Retail Park (140 spaces); and Farmfoods/Tile Giant (80 spaces).

Photographs of Lincoln West and Valentine Retail Park (July 2011)

Photograph 37 (top left): B&Q Supercentre - Tritton Road
Photograph 38 (top centre): Superbowl - Valentine Road
Photograph 39 (top right): Brantano, Game/Carphone Warehouse, Next – Valentine Retail Park
Photograph 40 (bottom left): The Range, Wren – Valentine Retail Park
Photograph 41 (bottom centre): Screwfix, B&M Homestore – Lincoln West Retail Park
Photograph 42 (bottom right): Fit Space health club – Lincoln West Retail Park

Figure 16: Land Use Plan for the Lincoln West and Valentine Retail Park (July 2011)



Source: Site Visit (July 2011)

PPS4 Health Check Indicator A4 – Retailer Representation and Retailer Demand

National and Independent Retailers (Goad)

Due to its important role and size, Lincoln City Centre accommodates a significant variety of independent and national retail, service and leisure operators. The largest units unsurprisingly tend to be operated by large-scale businesses, with the retail parks on the outskirts of the centre also accommodating a number of these types of operators. The independent retailers are generally concentrated to the northern and southern locations of the centre in the smaller shop units.

Top 20 Retailers (Focus)

Lincoln city centre accommodates 15 of the 'Top Twenty Retailers' identified by Focus, with the sole exceptions (in terms of still active retailers) being John Lewis, Dixons and Co-op department stores.

Table 34: Top 20 Retailers

Rank	Retailer
1	**Boots**
2	**Marks & Spencer**
3	**Argos**
4	~~Woolworths~~
5	**Debenhams**
6	John Lewis
7	**WH Smith**
8	**BHS**
9	**Next**
10	Dixons
11	**Superdrug**
12	**Lloyds Pharmacy**
13	**Wilkinson**
14	Co-op Department Stores
15	**Primark**
16	**New Look**
17	**HMV**
18	**Dorothy Perkins**
~~19~~	~~Rosebys~~
20	**Waterstones**

Source: Focus (2009)

PPS4 Health Check Indicator A4 – Retailer Representation and Retailer Demand (Continued…)

Retailer Demand/Ranking (Focus database)

The retail ranking (based on retailer demand) of Lincoln city centre has fluctuated considerably between 1997 and 2010, from 78th in 1997, 92nd in 2003, a peak of 70th in 2008 and reaching 93rd in 2010.

Table 35: Retail Ranking/Demand

Centre	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Lincoln	78	83	76	89	87	81	92	74	76	81	88	70	73	93

Source: Focus (July 2011)

Retailer Requirements (Focus database)

As noted in Table 36, in 2010 there were 22 retailers seeking representation in Lincoln city centre, with the number reduced significantly from its peak of 81 in 2005. The reduction in retailers seeking to locate in Lincoln from 2005 may be attributed to the development of the large-scale retail parks on the outskirts of the City which will have met the needs of many of those retailers.

Table 36: Retail Requirements

Centre	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Lincoln	56	60	62	59	59	68	65	73	81	74	70	44	37	22

Source: Focus (July 2011)

The Focus database in July outlined 16 retailers seeking to locate in Lincoln city centre, as indicated in Table 37.

Table 37: Retail Requirements

Sector	No. of Operators	Operators	Total Size (sq m)
Convenience	-	-	-
Comparison	9	The Perfume Shop, Ecco footwear, Rohan outdoor wear, Charles Clinkard shoes, Bargain Book Time, Matressman, Past Times, Select, Phase Eight	963 to 2,101
Retail Service	1	Yoko Garraspa beauty salon,	46 to 93
Leisure Service	5	Millies Cookies, Wok & Go, KFC, Atlantis Enterprises, Costa	759 to 1,706
Financial & Business Service	-	-	-
TOTAL	**15**	**-**	**1,768 to 3,900**

Source: Focus (July 2011)

In addition, Asiana, the cash and carry/wholesale retailer is seeking a 929 – 1,858 sq m unit.

Retail Rankings (Venuescore)

As indicated in Table 4, the retail ranking of Lincoln City Centre has declined between 2005 and 2010, from being 35th in 2005, to then peaking at 30th in 2007 and then falling to 40th in 2010.

PPS4 Health Check Indicator A5 – Shopping Rents

Table 38 identifies the changes in Zone A rents in Lincoln between 2003 and 2009. The rental levels in the centre have increased from £1,399/per sq m in June 2003 and 2004, to £1,453/per sq m in June 2005 and £1,507/per sq m in June 2006 to 2008. Zone A rents then decreased in June 2009 to £1,399/per sq m.

Table 38: Prime Pitch Zone A Rents (£/sq m)

Centre	June '03	June '04	June '05	June '06	June '07	June '08	June '09
Lincoln	£1,399	£1,399	£1,453	£1,507	£1,507	£1,507	£1,399

Source: Focus Report (2011) based on Colliers CRE's assessment of open market Zone A rents

A review of the properties to rent in Lincoln via Estates Gazette (July 2011) identified a variation in the current rental values (nb. total unit floorspace rental figure and not Zone A rental value) of the ground floor space, dependent on their location and building type. These units included: 264 High Street, which is seeking to achieve a rent of £231/sq m (119 sq m, £27,500 per annum), 18-20 Sincil Street which is seeking to achieve a rent of £132/per sq m (114 sq m, £15,000 per annum) and 116 High Street which is seeking to achieve a rent of £60/per sq m (748 sq m, £45,000 per annum).

PPS4 Health Check Indicator A6 – Vacant Street-Level Property

The site visit in July 2011 found that the 90 vacant units in Lincoln accounted for 16,090 sq m of the total floorspace in the town centre. The rate of vacant outlets (13.2%) was above the national average rate (11.7%), whilst the proportion of total vacant floorspace (9.4%) is just below the UK average figure (9.8%).

Table 39: Vacancies in Lincoln (July 2011)

	Vacancy		
	Total	Lincoln (%)	UK (%)
No. of Outlets	90	13.2%	11.7%
Floorspace (sq m)	16,090	9.4%	9.8%

Source: Site Visit (July 2011)

In February 2011, a total of 86 vacant units were recorded in Lincoln, which accounted for 16,560 sq m of floorspace in the centre. The number of vacant units increased to 90 in July 2011, though the amount of vacant floorspace (16,090 sq m) reduced slightly. High Street contains the majority of vacant units, with the 22 units accounting for 3,910 sq m of floorspace. There was also a concentration of vacant units at the Waterside Shopping Centre (nine units, 1,410 sq m) on Sincil Street (eight units, 780 sq m) and Clasketgate (six units, 1,440 sq m).

Figure 17: Vacancies in Lincoln City Centre (July 2011)

Source: Site Visit (July 2011)

Photographs of Vacant Units in Lincoln City Centre (July 2011)

Photograph 43 (top left): Former Salamander clothing store, 264 High Street (170 sq m)
Photograph 44 (top centre): Former Discovery Store Gifts, 11 Waterside Shopping Centre (250 sq m)
Photograph 45 (top right): Vacant in February 2011, 29-31 The Strait (400 sq m)
Photograph 46 (bottom left): Vacant in February 2011, 2 St Benedicts Square (90 sq m)
Photograph 47 (bottom centre): Vacant in February 2011, 1 The Stonebow Centre, Silver Street (170 sq m)
Photograph 48 (bottom right): Waterside South

PPS4 Health Check Indicator A7 – Commercial Yields

The commercial yield value of units in Lincoln has declined between April 2002 and July 2008 from a yield of 5.00% (April 2002 to July 2004), 5.25% (January 2005 to January 2008) and 5.75% (July 2008). However, in comparison to the other nearby centres, the investor confidence in Lincoln would still appear to be strong, reflecting its role as an important centre for the region.

PPS4 Health Check Indicator A9 – Pedestrian Footfall

Pedestrian movement in Lincoln city centre on the day of the site visit in July 2011 appeared high, with particular concentrations of activity noted at the pedestrianised junction of High Street/Guildhall Street/Saltergate, with the Waterside Shopping Centre, Primark and Marks & Spencer stores in particular attracting significant numbers of shoppers. It was noted that there was limited pedestrian activity in the southern section of High Street.

PPS4 Health Check Indicator A10 – Accessibility

Road Access: The primary access roads into Lincoln city centre comprise the A15, A46 and A57, with high traffic levels noted on these routes during the site visit in July 2011. Tritton Road, High Street and Canwick Road also provide the key routes into Lincoln from the south, with the partial pedestrianisation of High Street/Sincil Street/Guildhall Street/Saltergate effectively limiting traffic movement in this area.

Car Parking: Lincoln city centre accommodates a number of car parking facilities, including Tentercroft Street (290 spaces), Oxford Street (170 spaces), King Street (88 spaces), Wigford Way (80 spaces), Silver Street (51 spaces), St Martins Lane (47 spaces), Flaxengate (31 spaces) and St Marys Street (31 spaces). Car parking facilities are also available at the various multi-storey car parks in the centre, namely Broadgate (430 spaces), Lucy Tower (420 spaces), Wigford Way (362 spaces), Norman Street (300 spaces) and St Marks Shopping Centre (271 spaces). In addition, the two retail parks to the west of the centre contain a significant number of free car parking spaces, namely St Marks Retail Park (624 spaces) and Tritton Retail Park (500 spaces).

Public transport: Lincoln Central railway station on St Marys Street provides an infrequent train service to Sleaford (journey time of 31 minutes, every 55 minutes), Gainsborough (21 minutes, every 60 minutes) and Market Rasen (16 minutes, every 2 hours). The bus station on Melville Street also offers services to the main centres and outlying rural settlements, including North Hykeham and Birchwood.

PPS4 Health Check Indicator A12 – Perception of Safety and Occurrence of Crime

There are a total of 137 CCTV cameras in Lincoln which are monitored 24 hours, with the areas covered including Lincoln city centre, St Marks, North Kesteven, Monks Road and the Carlton Centre. A total of 739 crime and anti-social behaviour incidents were recorded in Lincoln city centre and the immediate surrounding area in June 2011 (Police Crime Maps, July 2011). The Lincoln city centre Pubwatch scheme currently has 44 member premises.

PPS4 Health Check Indicator A13 – Town Centre Environmental Quality

Overall, the environmental quality of Lincoln city centre is good, with the retail core concentrated on the pedestrianised northern area of High Street, Cornhill, Saltergate and Guildhall Street. There is a variety of building styles and designs in the centre, with historic units situated alongside modern developments to create an attractive shopping and leisure destination. The overall environmental quality on the day of the site visit was good, with little evidence of litter, vandalism or graffiti, though the southern section of High Street was of a lower standard.

MARKET RASEN HEALTH CHECK ASSESSMENT

Status: Town Centre – West Lindsey Local Plan (2006)

Centre Overview

Market Rasen is a small market town in West Lindsey District and is defined as a town centre (along with Gainsborough and Caistor) in the West Lindsey Local Plan (2006). The main shopping area in Market Rasen is concentrated along Queen Street, Union Street, Market Place and John Street. The Co-op store on John Street and the Nisa supermarket at Union Street anchor the town, with further foodstore provision in Market Rasen also available at the Tesco foodstore on the outskirts of the town centre.

Market Rasen is located on the main route between Grimsby and Lincoln (the A46), with Gainsborough located approximately 35km to the west and Lincoln City Centre 26km to the south west.

As Experian's latest GOAD survey of Market Rasen was undertaken in July 2007, a site visit of the town centre has been undertaken in order to ensure that the health check analysis could be compiled using the most up-to-date diversity of use and floorspace figures. This information has been used to compare the relevant data of Market Rasen town centre with the UK national average figures and, where necessary, identify any potential issues with the centre.

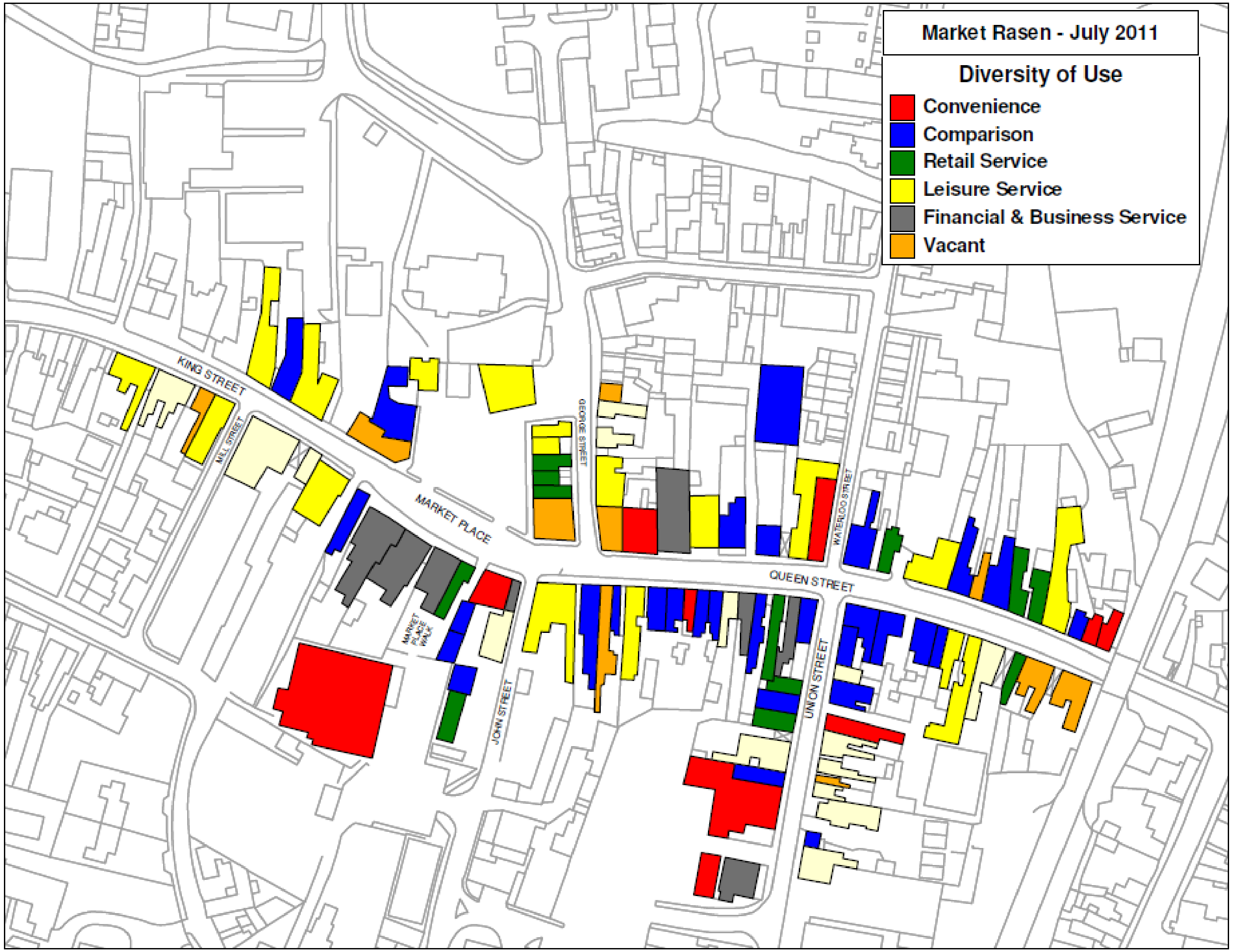
Photographs of Market Rasen Town Centre (July 2011)



Photograph 7 (top left): Tesco Store, Linwood Road (Outside of the Goad town centre boundary)
Photograph 8 (top centre): First Choice, Lloyds TSB, NatWest and HSBC, Market Place
Photograph 9 (top right): Albion Tea Shop, Queen Street
Photograph 10 (bottom left): Co-op Store, John Street
Photograph 11 (bottom centre): Nisa Local, Union Street
Photograph 12 (bottom right): Market Place Car Parking

PPS4 Health Check Indicator A1 – Diversity of main town centre uses

Figure 7: Land Use Plan for Market Rasen Town Centre (July 2011)



Source: Site Visit (July 2011)

PPS4 Health Check Indicator A1 – Diversity of main town centre uses

Table 18: Diversity of Uses in Market Rasen Town Centre (July 2007)

Number of Units			
	Number	Market Rasen	UK*
Convenience	9	10.3%	8.4%
Comparison	31	35.6%	35.3%
Retail Service	13	14.9%	12.6%
Leisure Services	17	19.5%	21.3%
Financial and Business Services	11	12.6%	11.5%
Vacant	6	6.9%	10.6%
Total	**87**	**100%**	**100%**

Source: Experian GOAD Report, July 2007
*UK Average Figure, December 2008

Table 19: Previous Floorspace in Market Rasen Town Centre (July 2007)

Existing Floorspace			
	sq m	Market Rasen	UK*
Convenience	2,070	18.5%	13.7%
Comparison	2,960	26.5%	38.8%
Retail Service	1,040	9.3%	6.8%
Leisure Services	2,800	25.1%	22.5%
Financial and Business Services	1,770	15.8%	9.0%
Vacant	530	4.7%	8.6%
Total	**11,170**	**100%**	**100%**

Source: Experian GOAD Report, July 2007
*UK Average Figure, December 2008

Table 20: Diversity of Uses in Market Rasen Town Centre (July 2011)

Number of Units			
	Number	Market Rasen	UK*
Convenience	10	11.4%	8.6%
Comparison	30	34.1%	33.5%
Retail Service	12	13.6%	13.2%
Leisure Services	18	20.5%	21.7%
Financial and Business Services	8	9.1%	11.0%
Vacant	10	11.4%	11.7%
Total	**88**	**100%**	**100%**

Source: Site Visit, July 2011
* UK Average Figure, Goad, April 2011

Table 21: Existing Floorspace in Market Rasen Town Centre (July 2011)

Existing Floorspace			
	sq m	Market Rasen	UK*
Convenience	2,160	19.3%	14.3%
Comparison	2,900	25.9%	36.9%
Retail Service	860	7.7%	7.0%
Leisure Services	3,010	26.9%	22.7%
Financial and Business Services	1,280	11.4%	8.5%
Vacant	990	8.8%	9.8%
Total	**11,200**	**100%**	**100%**

Source: Site Visit, July 2011
* UK Average Figure, Goad, April 2011

PPS4 Health Check Indicator A1 – Diversity of main town centre uses

The data in Tables 18 to 21 have been obtained from two sources, namely: the July 2007 GOAD map of Market Rasen; and the site visit in July 2011.

Convenience Units

Table 20 shows the diversity of use in Market Rasen town centre in July 2011, with the 10 convenience units accounting for 2,160 sq m of floorspace. The percentage of units (11.4%) and floorspace in use for the sale of convenience goods (19.3%) are both above the respective national average figures of 8.6% and 14.3%. At present, the sector is dominated by two national operators, namely: Co-op (John Street, 930 sq m) and Nisa (Union Street, 450 sq m). A large Tesco store is located on the outskirts of Market Rasen town centre, beyond the defined GOAD boundary. The rest of the convenience sector units are operated by independent traders and comprise three bakers, two butchers and greengrocers, and a CTN (Confectionery, Tobacconist and Newsagent).

Comparison Units

Comparison traders in Market Rasen occupy 34.1% of all outlets in the town centre, which is broadly commensurate to the national average rate of 33.5%. In terms of the comparison goods floorspace provision in the centre, the 30 units account for 2,900 sq m of floorspace, though the percentage of floorspace in use for comparison goods (25.9%) is below the national average figure of 36.9%. There are very few national comparison retailers in Market Rasen, including the Boots pharmacy (Queen Street, 160 sq m), Oxfam (Queen Street, 70 sq m) and Age UK (Union Street, 80 sq m) charity shops. The remaining 27 units are operated by independent retailers, with the largest comparison units being an antiques centre (Queen Street, 340 sq m) and a hardware store (Market Place, 200 sq m).

Retail Services

Retail services, which comprise such uses as hairdressers, dry cleaners and petrol filling stations, account for 13.6% of outlets (12 units) and 7.7% of floorspace (860 sq m) in Market Rasen, which is broadly similar to the respective national averages of 13.2% and 7.0%. Market Rasen has a total of 7 'Health and beauty' independent traders, with the other retail service uses comprising: a dry cleaners (Queen Street, 100 sq m); opticians (Market Place, 50 sq m); photo studio (Union Street, 80 sq m); and First Choice travel agents (Market Place, 80 sq m). The Post Office (90 sq m) is located on John Street.

PPS4 Health Check Indicator A1 – Diversity of main town centre uses (Continued…)

Leisure Services

Leisure services, as defined by Experian GOAD, include uses such as restaurants, cafes, bookmakers and public houses. Market Rasen is generally well-provided for in terms of the number of leisure units in the town centre, with the 18 units occupying 20.5% of all the outlets. The proportion of floorspace occupied by the leisure sector (26.9%) is above the national average (22.7%). Take-away traders occupy seven units in the town centre (1,150 sq m) and public houses occupy five units (1,000 sq m). There are also three cafes and one betting shop, club and restaurant. There are no national leisure operators in Market Rasen town centre.

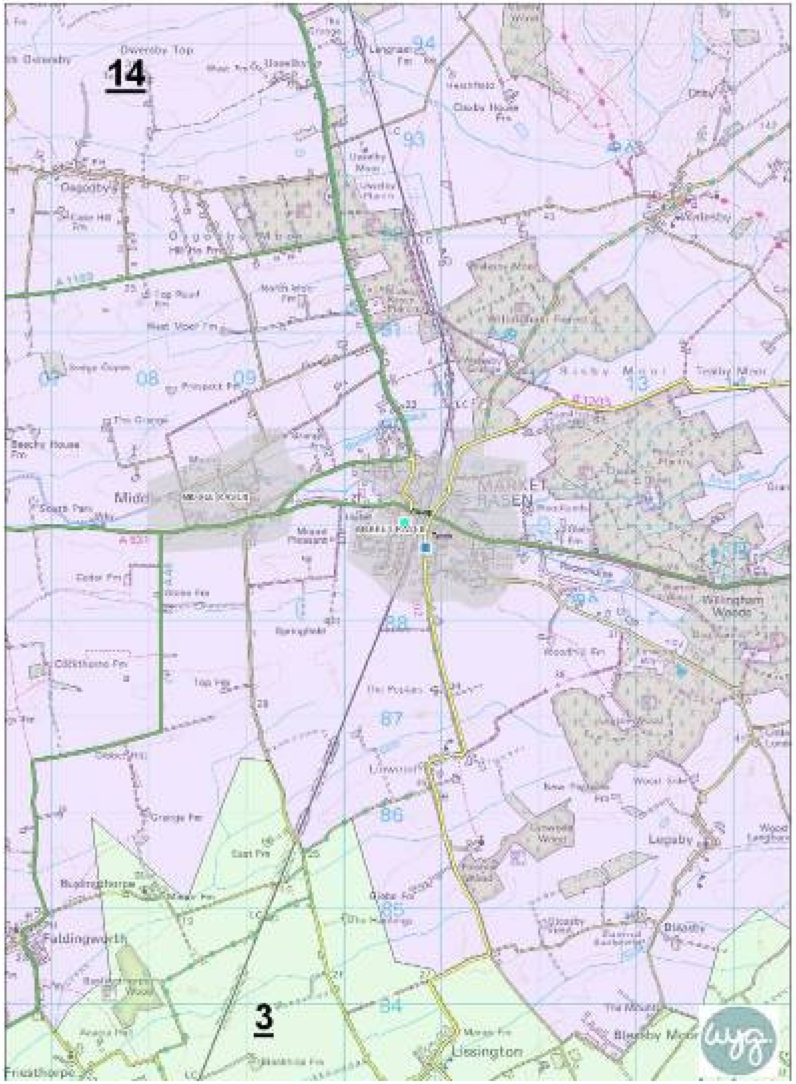
Financial and Business Services

In terms of the proportion of units occupied by financial and business services in Market Rasen, the proportion of outlets (9.1%) is slightly below the national average figure (11.0%), whilst the proportion of floorspace occupied by such uses in the town centre (11.4%) is above the national average level (8.5%). There are a total of three retail banks, namely: Lloyds TSB, Nat West and HSBC, with three property service units. There is also a careers/employment centre and a financial services unit.

Non-Retail Units

In addition to the retail service on offer within Market Rasen, there are also three medical services and a taxi firm operating in the town centre.

Figure 8: Market Rasen (Zone 14)



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PPS4 Health Check Indicator A2 -
The Amount of Retail, Leisure and Office Floorspace in Edge-of-Centre and Out-of-Centre Locations

As illustrated in Figure 8, the Tesco supermarket on Linwood Road is outside of the town centre boundary. The store opened for trading in September 2005 and has a gross area of 2,506 sq m and a net sales area of 1,325 sq m (IGD, 2010). It appeared to be trading well on the day of the site visit, with regular pedestrian movement between the store and Market Rasen town centre

PPS4 Health Check Indicator A4 – Retailer Representation and Retailer Demand

National and Independent Retailers (Goad)

Market Rasen town centre accommodates a limited number of national retailers, namely: two convenience retailers (Nisa and Co-op), three comparison retailers (Boots, Oxfam and Age UK charity shops), three financial and business service operators (Lloyds TSB, NatWest and HSBC) and two retailer service operators (the Post Office and First Choice). There are no national leisure operators located in Market Rasen.

Top 20 Retailers (Focus)

Focus identified in 2009 the 'Top Twenty Retailers' which are derived from ORC Data Service's ranking of the top 20 comparison goods multiples according to its forecast of average town centre sales for individual retailers within Great Britain. Noting that Woolworths and Rosebys have subsequently gone into administration, Market Rasen town centre accommodates only one of the 'Top Twenty Retailers' identified by Focus, namely the Boots unit on Queen Street (160 sq m).

Table 22: Top 20 Retailers

Rank	Retailer
1	**Boots**
2	Marks & Spencer
3	Argos
4	~~Woolworths~~
5	Debenhams
6	John Lewis
7	WH Smith
8	BHS
9	Next
10	Dixons
11	Superdrug
12	Lloyds Pharmacy
13	Wilkinson
14	Co-op Department Stores
15	Primark
16	New Look
17	HMV
18	Dorothy Perkins
~~19~~	~~Rosebys~~
20	Waterstones

Source: Focus (2009)

Retailer Demand/Ranking (Focus database)

A Focus report for Market Rasen which would provide details of the town's retail ranking is not available.

Retailer Requirements (Focus database)

There is currently only a single operator seeking a new store in Market Rasen, as identified by the Focus database (July 2011). The Yorkshire Trading Company is seeking 465 sq m unit stores in various high street locations in the local area. There are no further retailer requirements identified for the town centre in the Focus database.

Retail Rankings (Venuescore)

The retail ranking score of Market Rasen is not recorded in either the 2005, 2007 or 2010 Venuescore database.

PPS4 Health Check Indicator A5 – Shopping Rents

A Focus report for Market Rasen which would provide details of its Zone A shopping rents, is not available.

PPS4 Health Check Indicator A6 – Vacant Street-Level Property

The site visit in July 2011 found that the 10 vacant units in Market Rasen accounted for 990 sq m of the total floorspace in the town centre. The rate of vacant outlets (11.4%) was above the national average rate of 11.7%, whilst the proportion of total floorspace (8.8%) is also just above the UK average figure (9.8%). The size of the vacant units varies from 20 sq m to 170 sq m.

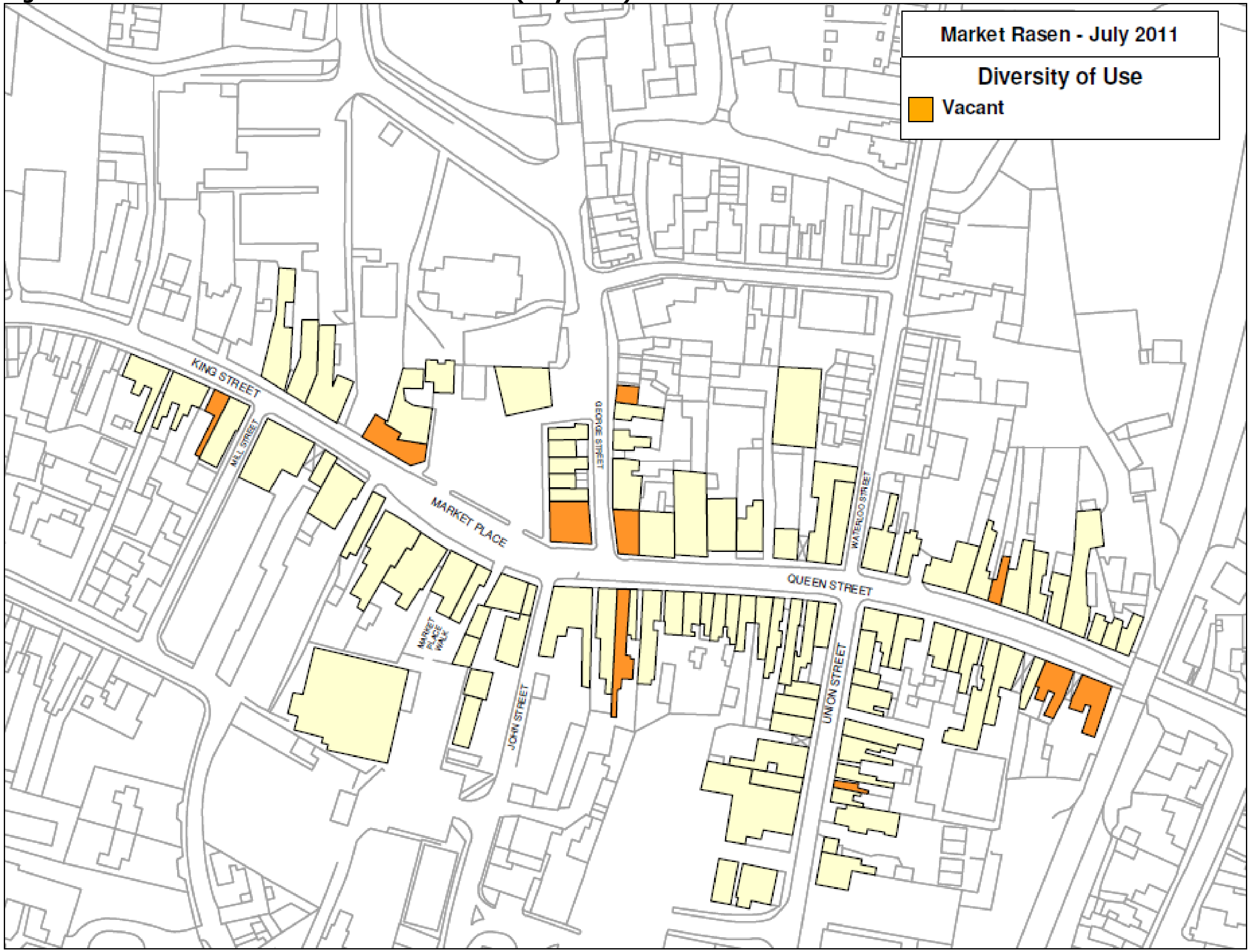
Table 23: Vacancies in Market Rasen (July 2011)

Vacancy			
	Total	Market Rasen (%)	UK (%)
No. of Outlets	10	11.4%	11.7%
Floorspace (sq m)	990	8.8%	9.8%

Source: Site Visit (July 2011)

The majority of the vacant units are located on Queen Street, with the five vacant units accommodating a total floorspace of 560 sq m. Market Place also accommodates two large vacant units, namely the former Square wine bar (140 sq m) and the former Halifax bank (170 sq m). Other vacant units are located on George Street (40 sq m), King Street (60 sq m) and Union Street (20 sq m). Between July 2007 and July 2010, the number of vacant units in Market Rasen has increased from six to 10, with the amount of vacant floorspace increasing from 530 sq m to 990 sq m.

Figure 9: Vacancies in Market Rasen Town Centre (July 2011)



Source: Site Visit (July 2011)

PPS4 Health Check Indicator A7 – Commercial Yields

Valuation Office Agency data for Market Rasen, which would provide details of its commercial yield is not available.

PPS4 Health Check Indicator A9 – Pedestrian Footfall

A general pedestrian flow count was recorded during the site visit of Market Rasen in order to identify those areas of movement with a high or low pedestrian footfall. Overall, it was noted that there was a relatively low level of pedestrian activity in the town centre, particularly on King Street to the west of the town centre. Pedestrian activity was concentrated on Market Place and Queen Street, with a frequent flow of movement to both the Co-op and Tesco foodstores.

PPS4 Health Check Indicator A10 – Accessibility

Road Access: Market Rasen is located on the A46 which connects Lincoln City Centre to Grimsby, with the A631 running directly through the town centre along Market Place and Queen Street.

Car Parking: There is an adequate supply of car parking in the town centre, with the principal facilities including: the Union Street car park next to the Nisa supermarket (approximately 50 spaces); John Street car park next to the Co-op supermarket (approximately 90 spaces); and the Market Place car park (approximately 40 spaces). In addition, free car parking spaces are also available for customers of the Tesco store on Linwood Road.

Public transport: Market Rasen benefits from good accessibility by public transport, with the railway station on Chapel Street less than five minutes walk from the town centre. Regular services are available to the main surrounding centres, including Grimsby and Lincoln. In addition, bus services are also available to Lincoln City Centre, Scunthorpe, Grimsby and the outlying smaller areas.

PPS4 Health Check Indicator A13 – Town Centre Environmental Quality

The town centre environment of Market Rasen is considered to be of a reasonable quality, though the vacant units and tired appearance of many of the buildings clearly detracts from the overall attractiveness of the centre. There was little evidence of litter, vandalism or graffiti on the day of the site visit.

SLEAFORD HEALTH CHECK ASSESSMENT

Status: Town Centre – North Kesteven Local Plan (2007)

Centre Overview

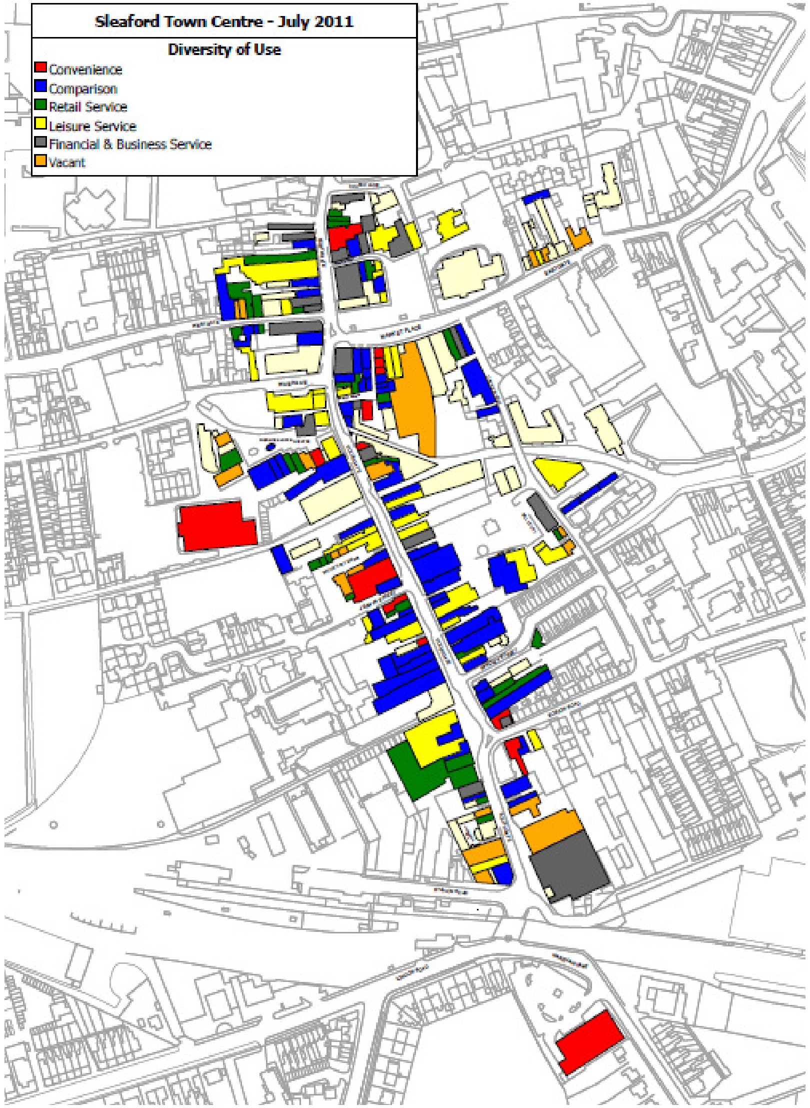
Sleaford is identified in the Local Plan (2007) as being the only free-standing town in North Kesteven District, with the town recognised as offering a 'significant' role as a service centre in terms of its retail provision. Reference is made in the Plan to the town providing daily and weekly shopping facilities, specialist shops, financial and office services, medical services and a wide range of other community and recreational facilities. The main shopping area of Sleaford is concentrated on Southgate, with various other secondary shopping streets, including Market Place and Westgate. The primary convenience foodstores in the town centre comprise the Sainsbury's supermarket to the rear of the Riverside Shopping Centre, the Iceland store on Southgate and the Aldi supermarket to the south of the town centre on Mareham Lane. Other foodstore units on the outskirts of Sleaford include the Tesco, Lidl and Co-op units on Lincoln Road to the north of the town centre.

As Experian's latest GOAD survey of Sleaford was undertaken in October 2009, a site visit of the town centre has been undertaken in order to ensure that the health check analysis could be compiled using the most up-to-date diversity of use and floorspace figures. This information has then been used by WYG to compare the relevant data of Sleaford town centre with the UK national average figures and, where necessary, identify any potential issues with the centre.

Photographs of Sleaford Town Centre (July 2011)

Photograph 49 (top left): Bristol Arcade, Southgate
Photograph 50 (top centre): Vacant Unit, Market Place
Photograph 51 (top right): Westgate
Photograph 52 (bottom left): Aldi store, Mareham Lane
Photograph 53 (bottom centre): Tesco store, Northgate
Photograph 54 (bottom right): Southgate

Figure 18: Land Use Plan for Sleaford Town Centre (July 2011)



Source: Site Visit (July 2011)

Table 40: Diversity of Uses in Sleaford Town Centre (April 2005)

Number of Units			
	Number	Sleaford	UK
Convenience	16	9.4%	9.1%
Comparison	85	49.7%	46.4%
Retail Service	22	12.9%	9.8%
Leisure Service	17	9.9%	13.9%
Financial and Business Service	18	10.5%	8.9%
Miscellaneous	3	1.8%	1.4%
Vacant	10	5.9%	10.5%
Total	**171**	**100%**	**100%**

Source: North Kesteven Study (Roger Tym & Partners, 2007)

Table 41: Previous Floorspace in Sleaford Town Centre (April 2005)

Existing Floorspace			
	sq m	Sleaford	UK
Convenience	-	-	-
Comparison	-	-	-
Retail Service	-	-	-
Leisure Service	-	-	-
Financial and Business Service	-	-	-
Miscellaneous	-	-	-
Vacant	-	-	-
Total	**-**	**%**	**%**

Source: North Kesteven Study (Roger Tym & Partners, 2007)

Table 42: Diversity of Uses in Sleaford Town Centre (October 2009)

Number of Units			
	Number	Sleaford	UK*
Convenience	18	9.2%	8.8%
Comparison	63	32.1%	34.4%
Retail Service	33	16.8%	13.0%
Leisure Service	35	17.9%	21.5%
Financial and Business Service	22	11.2%	11.1%
Vacant	25	12.8%	10.8%
Total	**196**	**100%**	**100%**

Source: Experian GOAD Report, October 2009
*UK Average Figure, September 2009

Table 43: Existing Floorspace in Sleaford Town Centre (October 2009)

Existing Floorspace			
	sq m	Sleaford	UK*
Convenience	4,980	13.0%	14.2%
Comparison	9,990	26.2%	37.6%
Retail Service	4.540	11.9%	7.0%
Leisure Service	7,450	19.5%	22.7%
Financial and Business Service	5,430	14.2%	8.7%
Vacant	5,800	15.2%	9.1%
Total	**38,190**	**100%**	**100%**

Source: Experian GOAD Report, October 2009
*UK Average Figure, September 2009

Table 44: Diversity of Uses in Sleaford Town Centre (July 2011)

Number of Units			
	Number	Sleaford	UK*
Convenience	17	8.7%	8.6%
Comparison	66	33.7%	33.5%
Retail Service	34	17.3%	13.2%
Leisure Services	36	18.4%	21.7%
Financial and Business Services	22	11.2%	11.0%
Vacant	21	10.7%	11.7%
Total	**196**	**100%**	**100%**

Source: Site Visit, July 2011
* UK Average Figure, Goad, April 2011

Table 45: Existing Floorspace in Sleaford Town Centre (July 2011)

Existing Floorspace			
	sq m	Sleaford	UK*
Convenience	4,920	12.9%	14.3%
Comparison	10,810	28.4%	36.9%
Retail Service	4,530	11.9%	7.0%
Leisure Service	7,500	19.7%	22.7%
Financial and Business Service	5,500	14.4%	8.5%
Vacant	4,850	12.7%	9.8%
Total	**38,110**	**100%**	**100%**

Source: Site Visit, July 2011
* UK Average Figure, Goad, April 2011

PPS4 Health Check Indicator A1 – Diversity of main town centre uses

The data in Tables 40 to 45 have been obtained from three sources, namely: the previous North Kesteven Retail and Commercial Leisure Study (Roger Tym & Partners, July 2007), the October 2009 GOAD map of Sleaford and the site visit in July 2011.

Convenience Units

In July 2011, there were 17 convenience units in Sleaford town centre which accommodated a total floorspace of 4,920 sq m. The percentage of units (8.7%) figure is marginally above the national average rate (8.6%), whilst the amount of floorspace in use for the sale of convenience goods (12.9%) is below the national average figure (14.3%). At present, the sector is dominated by two national supermarket operators, namely: the Sainsbury's unit at the Riverside Shopping Centre (1,700 sq m) and the Aldi unit on Mareham Lane (1,220 sq m). Other multiple convenience operators in the town centre include Iceland (640 sq m, Southgate), Greggs (110 sq m, Southgate), Thorntons (60 sq m, Southgate), and Timpson (60 sq m, Southgate). There are a total of five bakers, two CTN units, two supermarkets, two grocers, two shoe repairs/key cutting units, one butcher, one frozen foods store, one health foods store and an off-licence in Sleaford.

Comparison Units

Comparison traders in Sleaford occupy 33.7% of all outlets in the town centre, which is slightly above the national average rate of 33.5%. In terms of the comparison goods floorspace provision in the centre, the 66 units account for 10,810 sq m of floorspace, with the percentage of floorspace in use for comparison goods (28.4%) below the national average figure of 36.9%. The largest comparison units in Sleaford comprise the Yorkshire Trading Company unit (640 sq m, Southgate), Boots (610 sq m, Southgate), Timbers Fires (490 sq m, Southgate) and Boyes department store (490 sq m, Carre Street). Whilst there has been an increase in the number and amount of comparison goods floorspace in Sleaford between October 2009 and July 2011, several national comparison retailers have closed stores in the town centre, namely the Currys electrical store and Inter Sport, with both of these units currently vacant.

Retail Services

Retail services, which comprise such uses as hairdressers, dry cleaners and petrol filling stations, account for 17.3% of outlets (34 units) and 11.9% of floorspace (4,530 sq m) in Sleaford town centre, which compares to respective national averages of 13.2% and 7.0%. The largest retail service store is the Post Office (1,270 sq m, Southgate), though it should be noted that the majority of the unit is used as a delivery depot. There are a number of national retail service operators in Sleaford, namely; three travel agents (Co-op Travel, Thomas Cook and Thomson), Specsavers and Blockbuster video rental. There are a total of 22 health and beauty independent traders, four opticians, one dry cleaners, photo studio and vehicle repairs centre in the town centre.

PPS4 Health Check Indicator A1 – Diversity of main town centre uses (Continued…)

Leisure Services

Sleaford town centre is not well provided for in terms of the number (36) and amount of leisure service floorspace (7,500 sq m) in comparison with the national average. The largest leisure units comprise three public houses, namely; The Nags Head (1,030 sq m, Southgate), The Pack Horse (910 sq m, Northgate) and The Barge & Bottle (510 sq m, Carre Street). There are several national leisure operators in Sleaford, including; Costa, Subway, Ladbrokes and William Hill bookmakers. The most prominent leisure sectors in the town centre are; take-away units (11 units, 1,150 sq m), restaurants (seven units, 650 sq m) and public houses (six units, 3,320 sq m).

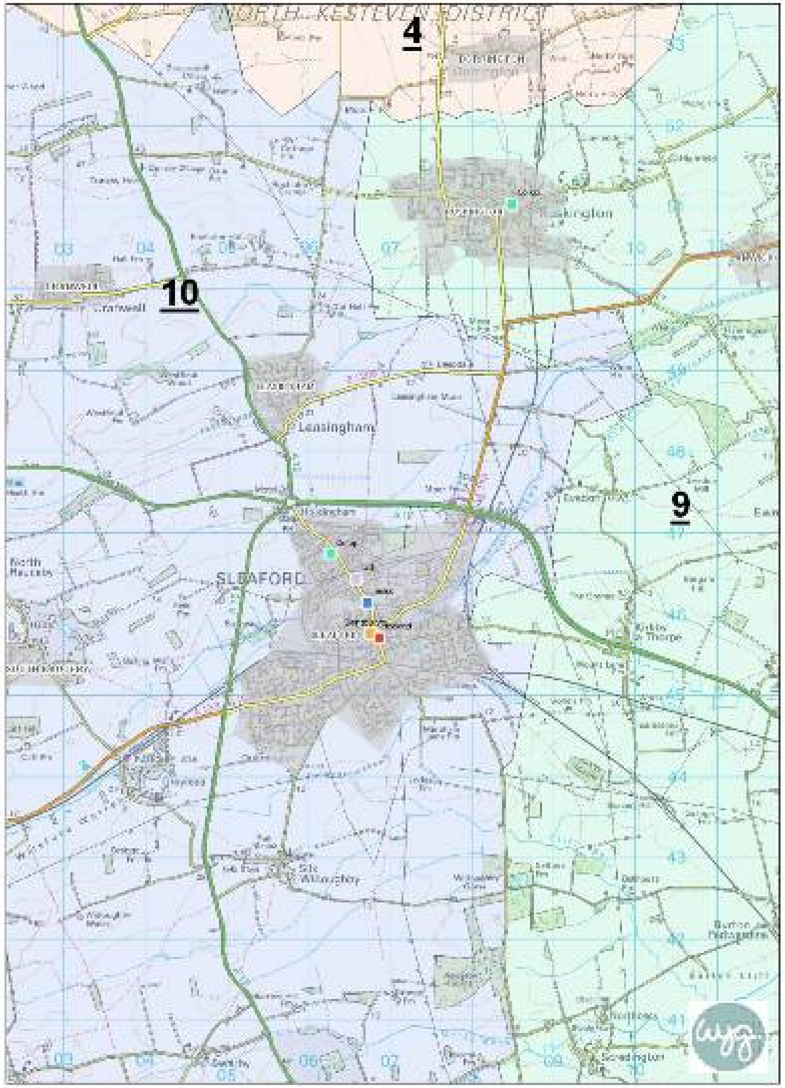
Financial and Business Services

In terms of the proportion of units occupied by financial and business services in Sleaford, the proportion of outlets (22 units – 11.2%) is slightly above the national average figure (11.0%), whilst the proportion of floorspace occupied by such uses in the town centre (5,500 sq m – 14.4%) is above the national average level (8.5%). The property service sector accounts for most of the financial and business service units in the town centre, with the seven units accounting for 800 sq m. The largest units comprise the Turnbull & Co building suppliers (1,920 sq m, Southgate) and Lloyds TSB bank (460 sq m, Northgate). There are a number of national operators in Sleaford, including Nationwide, Nat West, HSBC and Barclays.

Non-Retail Units

In addition to the retail service on offer within Sleaford town centre, there are also a number of other non-retail units, including seven offices, five medical service buildings, three information and advice centres (including Connexions and the Citizens Advice Bureau) and three government buildings (including a Job Centre).

Figure 19: Sleaford (Zone 10)



PPS4 Health Check Indicator A2 -
The Amount of Retail, Leisure and Office Floorspace in Edge-of-Centre and Out-of-Centre Locations

There are three large convenience units located outside of the defined Goad town centre boundary (Tesco, Lidl and Co-op), though it should be noted that the Tesco store on Northgate is included within the defined town centre boundary of the North Kesteven District Council Local Plan but excluded from the Goad map, whilst the Aldi store on Mareham Lane is not included within the Local Plan boundary but is identified in the Goad town centre map. Data from IGD (2010) identifies that the Tesco store has a gross floorspace of 2,836 sq m and a net floorspace of 2,000 sq m, with the store and car park extremely busy on the day of the site visit. Lidl store has a net floorspace of 929 sq m, with the Co-op store having a net floorspace of 279 sq m. Other large units which are located outside of the defined Goad town centre boundary include the Original Factory Shop on Boston Road and Homebase on Northgate.

PPS4 Health Check Indicator A4 – Retailer Representation and Retailer Demand

National and Independent Retailers (Goad)

Sleaford accommodates a number of key national retailers, reflecting its important role as the key centre in North Kesteven. Within the defined Goad town centre boundary there are the following multiple operators; six convenience retailers, 16 comparison retailers, six retail service operators, five leisure operators and nine financial and business service operators.

Top 20 Retailers (Focus)

Focus identified in 2009 the 'Top Twenty Retailers' which are derived from ORC Data Service's ranking of the top 20 comparison goods multiples according to its forecast of average town centre sales for individual retailers within Great Britain. Noting that Woolworths and Rosebys have subsequently gone into administration, Sleaford town centre accommodates only two of the 'Top Twenty Retailers' identified by Focus, namely; the Boots unit (610 sq m, Southgate) and the Superdrug store (410 sq m, Southgate).

Table 46: Top 20 Retailers

Rank	Retailer
1	**Boots**
2	Marks & Spencer
3	Argos
4	~~Woolworths~~
5	Debenhams
6	John Lewis
7	WH Smith
8	BHS
9	Next
10	Dixons
11	**Superdrug**
12	Lloyds Pharmacy
13	Wilkinson
14	Co-op Department Stores
15	Primark
16	New Look
17	HMV
18	Dorothy Perkins
~~19~~	~~Rosebys~~
20	Waterstones

Source: Focus (2009)

PPS4 Health Check Indicator A4 – Retailer Representation and Retailer Demand (Continued…)

Retailer Demand/Ranking (Focus database)

The retail ranking (based on retailer demand) of Sleaford has fluctuated considerably between 1997 and 2010, ranging from 641st in 1997, 524th in 2000 and 741st in 2001. Between 2006 and 2009 there was a gradual improvement from 678th to 413th, though in 2010 the retailer demand decreased dramatically to 1,065th.

Table 47: Retail Ranking/Demand

Centre	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Sleaford	641	834	719	524	741	706	533	599	665	678	648	562	413	1065

Source: Focus (July 2011)

Retailer Requirements (Focus database)

As noted in Table 48, in 2010 there were two retailers seeking representation in Sleaford, namely; the Yorkshire Trading Company (who are seeking 465 sq m unit stores in various high street locations in the local area, including Market Rasen) and Peacocks clothing store (who are seeking a 372 sq m to 929 sq m sized unit).

Table 48: Retail Requirements

Centre	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Sleaford	3	2	3	6	3	5	9	9	8	8	9	7	7	2

Source: Focus (July 2011)

Retail Rankings (Venuescore)

As noted in Figure 1, the retail ranking of Sleaford was 581st in 2005, improving to 526th in 2007, though reducing to 615th in 2010.

PPS4 Health Check Indicator A5 – Shopping Rents

The Focus report for Sleaford does not provide details of the Zone A shopping rents.

A review of the properties to rent in Sleaford via Estates Gazette (August 2011) identified a variation in the current rental values (nb. total unit floorspace rental figure and not Zone A rental value) of the ground floor space, dependent on their location and building type. There are several retail units to let including: 85 Southgate, which is seeking a rent of £209/per sq m (43 sq m, £9,000 per annum) and Unit 17-18 of the Riverside Shopping Centre, which is seeking a rent of £134/per sq m (112 sq m, £15,000 per annum).

PPS4 Health Check Indicator A6 – Vacant Street-Level Property

The site visit in July 2011 found that the 21 vacant units in Sleaford accounted for 4,850 sq m of the total floorspace in the town centre. Whilst the rate of vacant outlets (10.7%) was below the national average rate of 11.7%, the proportion of total floorspace (12.7%) is above the UK average figure (9.8%). The size of the vacant units varies from 30 sq m to 1,880 sq m.

Table 49: Vacancies in Sleaford (July 2011)

	Vacancy		
	Total	Sleaford (%)	UK (%)
No. of Outlets	21	10.7%	11.7%
Floorspace (sq m)	4,850	12.7%	9.8%

Source: Site Visit (July 2011)

The largest vacant units in the town centre comprise the following; the former Corn Exchange building (Market Place, 1,880 sq m) and former Flicks Cinema (Southgate, 860 sq m), with both of these units also identified as being vacant in October 2009. It should be noted that several of the units which are identified as being vacant in White Hart Mews were being refurbished on the day of the site visit in July 2011. Between October 2009 and July 2011, there has been a reduction both in the number of vacant units in Sleaford town centre (from 25 to 21 units) and the amount of vacant floorspace (from 5,800 sq m to 4,850 sq m). Since October 2009, 14 units which were formerly vacant have now been occupied and now accommodate a variety of uses, including Embers fire shop (490 sq m), a gift shop (310 sq m) and Costa café (160 sq m). There are 10 units which were previously identified as being occupied in October 2009 which are now vacant, including the former Curry's (190 sq m), Inter Sport (180 sq m) and Rendezvouz Café (100 sq m).

Figure 20: Vacancies in Sleaford (July 2011)

Source: Site Visit (July 2011)

PPS4 Health Check Indicator A7 – Commercial Yields

The commercial yield value of units in Sleaford remained static at 8.00% between April 2002 and January 2005, with an improvement since then to July 2008 of 7.75%, which suggests that there has been a slight increase in investor confidence in the town centre.

PPS4 Health Check Indicator A9 – Pedestrian Footfall

A general pedestrian flow count was recorded during the site visit of Sleaford in order to identify those areas of movement with a high or low pedestrian footfall. There appeared to be a relatively medium level of pedestrian activity along Southgate, with high levels of pedestrians focussed at the Sainsbury and Tesco supermarkets. The Riverside Shopping Centre and Bristol Arcade appeared quiet on the day of the site visit.

PPS4 Health Check Indicator A10 – Accessibility

Road Access: Sleaford is located to the east of the A15 and to the south of the A17, with Grantham located 25km to the south west and Lincoln city centre 30km to the north. There appeared to be traffic congestion along the one-way traffic system through the town centre on Southgate and Carre Street, with slow movement noted at the key road junctions. This issue was identified in the Sleaford Masterplan (April 2011, Gillespies) with a number of transport initiatives and measures considered in order to help deliver improved transport movement in the centre.

Car Parking: There are several pay and display car parks in Sleaford town centre, with the largest facilities located at Eastgate (172 spaces), Mill Court (approximately 80 spaces), Market Place (approximately 50 spaces) and Jermyn Street (22 spaces). Further car parking provision is available at the Sainsbury's (Watergate, approximately 150 spaces) and Aldi (Mareham Lane, approximately 85 spaces) supermarkets.

Public transport: Sleaford train station is located to the south of the town centre, with a level crossing on Southgate/Station Road/London Road. Bus pick-up points are located throughout the centre, including on Station Road, Southgate and Market Place. A frequent bus and train service is provided to the key surrounding centres, including Lincoln city centre, Gainsborough and Nottingham, in addition to the smaller outlying settlements.

PPS4 Health Check Indicator A12 – Perception of Safety and Occurrence of Crime

The Sleaford BID Crime Survey in September 2008 identified that 2 out of every 3 businesses which replied to the paper-based survey had been a victim of crime during the previous 12 months, with a total of 154 crimes recorded. Only 31% of crimes had been reported to the police, with criminal damage and vandalism the most common type of crime. To address these issues, a number of improvements were implemented, including Sleaford BID providing overnight security patrols in the BID area seven days a week. In addition, the Sleaford Shopwatch, Businesswatch and Pubwatch Schemes were developed further and continue to be run in partnership with Sleaford Business Improvement District (BID), Sleaford Town Council, North Kesteven District Council and North Kesteven Community Safety Partnership. The Sleaford Shopwatch scheme provides its members with radio link handsets to report any suspicious activity, incidents or anti-social behaviour to other members and the police. There are eight CCTV cameras in the Sleaford area which are monitored 24 hours a day.

PPS4 Health Check Indicator A13 – Town Centre Environmental Quality

Sleaford is a relatively attractive settlement, with several high quality historic buildings helping to positively contribute to the environmental quality of the town centre. Other areas of Sleaford, however are of a poor quality, including those areas where there is a concentration of vacant units, for example the Riverside Shopping Centre, Eastgate and the southern section of the town centre. As noted in the A10 road access indicator, there is a concentration of congestion along the one-way system through the town centre, which adversely affects the environmental quality of Sleaford. There was little evidence of litter, vandalism or graffiti on the day of the site visit in July 2011.

HEALTH CHECK ASSESSMENT – KEY SERVICE CENTRES

Introduction

Set out in the following section is WYG's health check assessment of the 23 smaller key service centres across the Central Lincolnshire area, which we have categorised according to whether they are located within the Lincoln Principal Urban Area or in rural areas beyond the built up urban area. The list of key service centres is outlined in Table 1.

Table 1: Service Centres reviewed by WYG

Centres Within Lincoln Principal Urban Area	Rural Centres	
3. Birchwood District Centre	1. Bardney	17. Ruskington
4. Bracebridge Heath	2. Billinghay	18. Saxilby
5. Burton Road	6. Caistor	19. Scotter
11. Monks Road	7. Cherry Willingham	22. Welton
14. Nettleham Road	8. Heckington	
15. Newark Road – Bracebridge	9. Keelby	
16. North Hykeham	10. Metheringham	
20. The Junction of Boultham and Skellingthorpe Road	12. Navenby	
21. Waddington	13. Nettleham	
23. Wragby Road		

Methodology

It should be noted that due to the small size of the centres, there was a lack of general information available from national performance data sources (for example Experian Goad, Focus and Venuescore) which have been used to review the four key centres. In addition, no floorspace data for the units was available. Therefore, in order to accurately determine and assess the health of the centres, site visits were conducted in July 2011, with a record made of the diversity of use, the operator and the general environmental condition of the centre. An additional site visit of Bracebridge Heath was undertaken in May 2012.

Table 2: Diversity of Use Figures of the Centres

Centre	Convenience		Comparison		Retail Service		Leisure Service		Financial/Business Service		Vacant		Total
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.
1. Bardney	2	16.7%	2	16.7%	3	25.0%	3	25.0%	0	0.0%	2	16.7%	12
2. Billinghay	1	16.7%	0	0.0%	3	50.0%	0	0.0%	0	0.0%	2	33.3%	6
3. Birchwood	4	16.0%	8	32.0%	4	16.0%	7	28.0%	0	0.0%	2	8.0%	25
4. Bracebridge Heath	4	22.2%	1	5.6%	4	22.2%	5	27.8%	0	0.0%	4	22.2%	18
5. Burton Road	4	16.0%	9	36.0%	4	16.0%	7	28.0%	0	0.0%	1	4.0%	25
6. Caistor	4	13.8%	5	17.2%	5	17.2%	8	27.6%	2	6.9%	5	17.2%	29
7. Cherry Willingham	3	30.0%	1	10.0%	1	10.0%	5	50.0%	0	0.0%	0	0.0%	10
8. Heckington	3	15.8%	4	21.1%	4	21.1%	5	26.3%	1	5.3%	2	10.5%	19
9. Keelby	2	28.6%	0	0.0%	3	42.9%	2	25.8%	0	0.0%	0	0.0%	7
10. Metheringham	4	22.2%	4	22.2%	3	16.7%	5	27.8%	0	0.0%	2	11.1%	18
11. Monks Road	2	28.6%	0	0.0%	3	42.9%	1	14.3%	0	0.0%	1	14.3%	7
12. Navenby	3	13.6%	4	18.2%	5	22.7%	8	36.4%	0	0.0%	2	9.1%	22
13. Nettleham	3	20.0%	2	13.3%	5	33.3%	4	26.7%	1	6.7%	0	0.0%	15
14. Nettleham Road	4	25.0%	4	25.0%	3	18.8%	5	31.2%	0	0.0%	0	0.0%	16
15. Newark Road	2	9.5%	9	42.9%	3	14.3%	5	23.8%	0	0.0%	2	9.5%	21
16. North Hykeham	9	15.8%	17	29.8%	9	15.8%	13	22.8%	8	14.0%	1	1.8%	57
17. Ruskington	7	21.2%	10	30.3%	6	18.2%	8	24.2%	2	6.1%	0	0.0%	33
18. Saxilby	3	21.4%	2	14.3%	3	21.4%	5	35.7%	0	0.0%	1	7.1%	14
19. Scotter	3	30.0%	0	0.0%	5	33.3%	7	46.7%	0	0.0%	0	0.0%	15
20. The Junction	4	36.4%	1	9.1%	1	9.1%	5	45.4%	0	0.0%	0	0.0%	11
21. Waddington	2	16.7%	2	16.7%	3	25.0%	5	41.6%	0	0.0%	0	0.0%	12
22. Welton	2	22.2%	2	22.2%	1	11.1%	4	44.4%	0	0.0%	0	0.0%	9
23. Wragby Road	4	22.2%	5	27.8%	4	22.2%	5	27.8%	0	0.0%	0	0.0%	18
Centres Average	**3**	**20.9%**	**4**	**17.8%**	**4**	**22.8%**	**5**	**29.9%**	**1**	**1.7%**	**1**	**7.1%**	**18**
UK Average	**-**	**8.6%**	**-**	**33.5%**	**-**	**13.2%**	**-**	**21.7%**	**-**	**11.0%**	**-**	**11.7%**	**-**

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

1. Bardney

Status: Primary Rural Settlement – West Lindsey Local Plan (2006)

Centre Overview: Bardney is located approximately 18km to the east of Lincoln city centre and 10km to the south of Wragby town centre. The retail and service units in Bardney are widely dispersed, with the small Co-op located on Wragby Road, the Post Office on Silver Street and the other units primarily located on Station Road. The centre appeared extremely quiet on the day of the study, both in terms of pedestrian and vehicular movement.

Diversity of Uses: A total of 12 units were identified in Bardney during the site visit, including:

- Two convenience units (Co-op and a butcher);
- Two comparison units (pharmacy and cycle shop);
- Three retail service units (Post Office, hairdressers and barbers); and
- Three leisure units (three public houses).

Table 3: Diversity of Uses in Bardney (July 2011)

Number of Units			
	Number	Bardney	UK*
Convenience	2	16.7%	8.6%
Comparison	2	16.7%	33.5%
Retail Service	3	25.0%	13.2%
Leisure Service	3	25.0%	21.7%
Financial and Business Service	0	0.0%	11.0%
Vacant	2	16.7%	11.7%
Total	**12**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified two vacant units in Bardney.

Representation from National Retailers: There are two national retailers located in Bardney, namely the Co-op and the Post Office.

1. Bardney

Photographs of Bardney (July 2011)

Photograph 1 (top left): Post Office, Silver Street
Photograph 2 (top centre): Pharmacy, Station Road
Photograph 3 (top right): Butcher, Station Road
Photograph 4 (bottom left): Co-op unit, Wragby Road
Photograph 5 (bottom centre): Queen Street
Photograph 6 (bottom right): Vacant units, Station Road

2. Billinghay

Status: Service Village – North Kesteven Local Plan (2007)

Centre Overview: Billinghay is located approximately 28km to the south-east of Lincoln city centre and 16km to the north-east of Sleaford town centre. The small Co-op store offers a basic service for local residents, with a limited number of top-up products available to purchase from the unit.

Diversity of Uses: A total of six units were identified in Billinghay during the site visit, including:

- One convenience unit (Co-op); and
- Three retail service units (Post Office, hairdressers and beauty salon).

Table 4: Diversity of Uses in Billinghay (July 2011)

Number of Units			
	Number	Billinghay	UK*
Convenience	1	16.7%	8.6%
Comparison	0	0.0%	33.5%
Retail Service	3	50.0%	13.2%
Leisure Service	0	0.0%	21.7%
Financial and Business Service	0	0.0%	11.0%
Vacant	2	33.3%	11.7%
Total	**6**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified two vacant units in Billinghay.

Representation from National Retailers: There are two national retailers located in Billinghay, namely the Co-op and the Post Office.

2. Billinghay

Photographs of Billinghay (July 2011)

Photograph 7 (top left): Church Street
Photograph 8 (top centre): High Street
Photograph 9 (top right): Hairdressers, High Street
Photograph 10 (bottom left): Bridge Street
Photograph 11 (bottom centre): Vacant unit, High Street
Photograph 12 (bottom right): Co-op unit, Church Street

3. Birchwood District Centre

Status: District Mixed-use Centre – City of Lincoln Local Plan (1998)

Centre Overview: Birchwood District Centre is located 5km to the south-west of Lincoln city centre. The Centre appeared extremely busy on the day of the site visit, with the car park almost full. The purpose built shopping precinct includes a good variety of retail and service units, with no evidence of vandalism or graffiti.

Diversity of Uses: A total of 25 units were identified in the Birchwood District Centre during the site visit, including:

- Four convenience units (Co-op, Martin's convenience store, a butcher and baker);
- Eight comparison units (Co-op pharmacy, Pound Stretcher, Celebrations gifts, Occasions card shop, charity shop, mobility centre, gardening centre and general shop);
- Four retail service units (Post Office in Martins, beauty salon, opticians and computer repair centre); and
- Seven leisure units (four take-aways, two public houses and Bet Fred bookmakers).

Table 5: Diversity of Uses in Birchwood (July 2011)

	Number of Units		
	Number	Birchwood District Centre	UK*
Convenience	4	16.0%	8.6%
Comparison	8	32.0%	33.5%
Retail Service	4	16.0%	13.2%
Leisure Service	7	28.0%	21.7%
Financial and Business Service	0	0.0%	11.0%
Vacant	2	8.0%	11.7%
Total	**25**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified two vacant units in Birchwood.

Representation from National Retailers: There are eight national retailers located in the Birchwood District Centre.

3. Birchwood District Centre

Photographs of Birchwood District Centre (July 2011)

Photograph 13 (top left): The Birchwood Centre
Photograph 14 (top centre): Take-away units
Photograph 15 (top right): Co-op unit
Photograph 16 (bottom left): Martin’s convenience store
Photograph 17 (bottom centre): Pound Stretcher
Photograph 18 (bottom right): Vacant Unit

4. Bracebridge Heath

Status: Service Village – North Kesteven Local Plan (2007)

Centre Overview: Bracebridge Heath is located approximately 3.5 km to the south of Lincoln city centre. The village centre is concentrated in a linear form along Grantham Road, with the busy junction of the A15 (London/Sleaford Road) enabling a strong flow of vehicular and pedestrian activity. The Tesco and Co-op stores appeared to be the most visited units on the day of the site visit, with Bracebridge Heath also accommodating a number of other activities, including two churches, a primary school, taxi office, a social club, library, doctors surgery and police station.

Diversity of Uses: A total of 18 units were identified in Bracebridge Heath during the site visit, including:

- Four convenience units (Co-op, Martin's convenience store, Tesco Express and a confectioners);
- One comparison unit (Co-op pharmacy);
- Four retail service units (Post Office, two hairdressers and a beauty salon); and
- Five leisure units (three take-aways, a café and public house).

Table 6: Diversity of Uses in Bracebridge Heath (May 2012)

	Number of Units		
	Number	Bracebridge Heath	UK*
Convenience	4	22.2%	8.0%
Comparison	1	5.6%	33.4%
Retail Service	4	22.2%	13.4%
Leisure Service	5	27.8%	21.8%
Financial and Business Service	0	0.0%	10.9%
Vacant	4	22.2%	12.2%
Total	**18**	**100%**	**100%**

Source: Site Visit, May 2012, * UK Average Figure, Goad, April 2012

Vacancy Rates: The site visit in May 2012 identified four vacant units in Bracebridge Heath, including a former public house (the Blacksmiths Arms). .

Representation from National Retailers: There are three national retailers located in Bracebridge Heath, namely the Co-op pharmacy and foodstore, Martins newsagent/convenience store and Tesco Express.

4. Bracebridge Heath

Photographs of Bracebridge Heath (May 2012)




Photograph 19 (top left): Hairdressers and vacant unit
Photograph 20 (top centre): Vacant unit
Photograph 21 (top right): Post Office and Co-op foodstore/pharmacy
Photograph 22 (bottom left): Take-away unit
Photograph 23 (bottom centre): Martin's newsagent
Photograph 24 (bottom right): Tesco Express

5. Burton Road

Status: Identified as a Potential District Mixed-use Centre in the City of Lincoln Retail and Town Centre Study (2007)

Centre Overview: Burton Road is located less than 1.5km to the north-west of Lincoln city centre, with the 25 retail and service units dispersed in a linear form along the main B1398 route into the centre. The Co-op and McColl's convenience stores appear to be the most popular retail units.

Diversity of Uses: A total of 25 units were identified on Burton Road during the site visit, including:

- Four convenience units (Co-op, McColl's convenience store, off-licence and baker);
- Nine comparison units (two gift shops, two charity shops, Co-op pharmacy, discount store, electrical goods unit, florist and lighting shop);
- Four retail service units (Post Office, beauty salon and two hairdressers); and
- Seven leisure units (five take-aways, one public house and a Coral bookmaker).

Table 7: Diversity of Uses in Burton Road (July 2011)

Number of Units			
	Number	Burton Road	UK*
Convenience	4	16.0%	8.6%
Comparison	9	36.0%	33.5%
Retail Service	4	16.0%	13.2%
Leisure Service	7	28.0%	21.7%
Financial and Business Service	0	0.0%	11.0%
Vacant	1	4.0%	11.7%
Total	**25**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified one vacant unit on Burton Road.

Representation from National Retailers: There are five national retailers located on Burton Road.

5. Burton Road

Photographs of Burton Road (July 2011)


Photograph 25 (top left): Co-op unit
Photograph 26 (top centre): Burton Road
Photograph 27 (top right): McColl's convenience store
Photograph 28 (bottom left): Burton Road
Photograph 29 (bottom centre): Burton Road
Photograph 30 (bottom right): Burton Road

6. Caistor

Status: Town Centre – West Lindsey Local Plan (2006)

Centre Overview: Caistor is located to the north of the A46 Caistor Bypass, approximately 38km to the north east of Lincoln city centre and 20km from Grimsby town centre. The majority of the retail units are concentrated on Market Place, with the Co-op store located on High Street. Caistor town centre also contains a community centre and veterinary surgery.

Diversity of Uses: A total of 29 units were identified in Caistor during the site visit, including:
- Four convenience units (Co-op, butcher, newsagent and off-licence);
- Five comparison units (Co-op pharmacy, antique shop, children's clothing store, picture framing and toyshop);
- Five retail service units (two hairdressers, Post Office, photography studio and beauty salon);
- Eight leisure units (four take-aways, two cafes, a restaurant and public house); and
- Two financial and business service units (NatWest and an estate agent).

Table 8: Diversity of Uses in Caistor (July 2011)

Number of Units			
	Number	Caistor	UK*
Convenience	4	13.8%	8.6%
Comparison	5	17.2%	33.5%
Retail Service	5	17.2%	13.2%
Leisure Service	8	27.6%	21.7%
Financial and Business Service	2	6.9%	11.0%
Vacant	5	17.2%	11.7%
Total	**29**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified five vacant units in Caistor.

Representation from National Retailers: There are three national operators located in Caistor, namely NatWest, the Post Office, and the Co-op foodstore and pharmacy.

6. Caistor

Photographs of Caistor (July 2011)

Photograph 31 (top left): Plough Hill
Photograph 32 (top centre): Boots pharmacy, Market Place
Photograph 33 (top right): Co-Op, High Street
Photograph 34 (bottom left): Photography studio, High Street
Photograph 35 (bottom centre: Fish and chip take away, Co-op and vacant unit
Photograph 36 (bottom right): Market Place

7. Cherry Willingham

Status: Primary Rural Settlement – West Lindsey Local Plan (2006)

Centre Overview: The Cherry Willingham purpose-built shopping parade is a self contained unit located approximately 6km to the east of Lincoln city centre. At the time of the visit, the car park in front of the units was almost fully occupied. Cherry Willingham also contains a library and surgery.

Diversity of Uses: A total of ten units were identified in Cherry Willingham during the site visit, including:

- Three convenience units (Co-op, butcher and newsagent);
- One comparison unit (Co-op pharmacy);
- One retail service unit (hairdressers); and
- Five leisure units (three take-aways, one café and public house).

Table 9: Diversity of Uses in Cherry Willingham (July 2011)

	Number of Units		
	Number	**Cherry Willingham**	**UK***
Convenience	3	30.0%	8.6%
Comparison	1	10.0%	33.5%
Retail Service	1	10.0%	13.2%
Leisure Service	5	50.0%	21.7%
Financial and Business Service	0	0.0%	11.0%
Vacant	0	0.0%	11.7%
Total	**10**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified that there was no vacant units in Cherry Willingham.

Representation from National Retailers: There is one national operator located in Cherry Willingham, namely the Co-op foodstore and pharmacy.

7. Cherry Willingham

Photographs of Cherry Willingham (July 2011)

Photograph 37 (top left): Cherry Willingham
Photograph 38 (top centre): Cherry Willingham car parking
Photograph 39 (top right): Cherry Willingham Library
Photograph 40 (bottom left): Lincolnshire Echo newsagent
Photograph 41 (bottom centre: Co-op unit
Photograph 42 (bottom right): Cherry Willingham

8. Heckington

Status: Service Village – North Kesteven Local Plan (2007)

Centre Overview: Heckington is located approximately 11km to the east of Sleaford town centre. The majority of the retail and service units are dispersed along Boston Road, Church Street and High Street. The majority of pedestrian activity is concentrated at the small Co-op unit. Heckington also contains a village hall and veterinary surgery.

Diversity of Uses: A total of 19 units were identified in Heckington during the site visit, including:

- Three convenience units (Co-op, bakery and newsagent);
- Four comparison units (florist, pharmacy, DIY store and toy shop);
- Four retail service units (two hairdressers, Post Office and nail salon);
- Five leisure units (two take-aways, one café, one sports bar and a public house); and
- One financial and business service (Lloyds TSB).

Table 10: Diversity of Uses in Heckington (July 2011)

Number of Units			
	Number	Heckington	UK*
Convenience	3	15.8%	8.6%
Comparison	4	21.1%	33.5%
Retail Service	4	21.1%	13.2%
Leisure Service	5	26.3%	21.7%
Financial and Business Service	1	5.3%	11.0%
Vacant	2	10.5%	11.7%
Total	**19**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified that there were two vacant units in Heckington.

Representation from National Retailers: There are three national operators located in Heckington, namely the Co-op foodstore, Post Office and Lloyds TSB bank.

8. Heckington

Photographs of Heckington (July 2011)





Photograph 43 (top left): Hairdresser and Cafe, Church Street
Photograph 44 (top centre): The Nags Head public house, High Street
Photograph 45 (top right): Take-away unit, High Street
Photograph 46 (bottom left): Vacant unit, Church Street
Photograph 47 (bottom centre: Co-op foodstore, High Street
Photograph 48 (bottom right): DIY store, High Street

9. Keelby

Status: Primary Rural Settlement – West Lindsey Local Plan (2006)

Centre Overview: Keelby is located to the north of the A1173 Riby Road Bypass, approximately 52km to the north-east of Lincoln city centre and 15km to Grimsby town centre. The majority of the retail units are concentrated on Manor Street.

Diversity of Uses: A total of seven units were identified in Keelby during the site visit, including:

- Two convenience units (Spar and village store);
- Three retail service units (Post Office, hairdressers and beauty salon); and
- Two leisure units (take-away and public house).

Table 11: Diversity of Uses in Keelby (July 2011)

Number of Units			
	Number	Keelby	UK*
Convenience	2	28.6%	8.6%
Comparison	0	0.0%	33.5%
Retail Service	3	42.9%	13.2%
Leisure Service	2	28.6%	21.7%
Financial and Business Service	0	0.0%	11.0%
Vacant	0	0.0%	11.7%
Total	**7**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified no vacant units in Keelby.

Representation from National Retailers: There are two national retailers located in Keelby, namely the Post Office and the Spar store.

9. Keelby

Photographs of Keelby (July 2011)

Photograph 49 (top left): Newsagent unit
Photograph 50 (top centre): Spar unit
Photograph 51 (top right): Take-away unit, King Street
Photograph 52 (bottom left): Hair salon
Photograph 53 (bottom centre: Post Office
Photograph 54 (bottom right): Keelby centre, Manor Street

10. Metheringham

Status: Service Village – North Kesteven Local Plan (2007)

Centre Overview: Metheringham is located approximately 16km to the south east of Lincoln city centre, east of the B1188 (Sleaford Road). The majority of the retail and service units are located on High Street, with on-street parking providing provided in front of many of the units. Metheringham also contains a village hall, library and the North Kesteven District Council Information Centre.

Diversity of Uses: A total of 21 units were identified in Metheringham during the site visit, including:

- Four convenience units (Co-op, convenience store, newsagent and butchers);
- Four comparison units (Co-op pharmacy, gift shop, motor spares retailer and charity shop);
- Three retail service units (Post Office, hairdressers and beauty salon); and
- Five leisure units (three public houses and two take-aways).

Table 12: Diversity of Uses in Metheringham (July 2011)

Number of Units			
	Number	Metheringham	UK*
Convenience	4	22.2%	8.6%
Comparison	4	22.2%	33.5%
Retail Service	3	16.7%	13.2%
Leisure Service	5	27.8%	21.7%
Financial and Business Service	0	0.0%	11.0%
Vacant	2	11.1%	11.7%
Total	**18**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified two vacant units in Metheringham.

Representation from National Retailers: There are two national retailers located in Metheringham, namely the Post Office, and the Co-op store and pharmacy.

10. Metheringham

Photographs of Metheringham (July 2011)

Photograph 55 (top left): Co-op Pharmacy and Post Office, High Street
Photograph 56 (top centre): Metheringham village centre
Photograph 57 (top right): The Star and Garter public house, High Street
Photograph 58 (bottom left): Gift shop, High Street
Photograph 59 (bottom centre: North Kesteven District Council Information Centre, High Street
Photograph 60 (bottom right): Co-op foodstore, High Street

11. Monks Road

Status: Identified as a Potential District Mixed-use Centre in the City of Lincoln Retail and Town Centre Study (2007)

Centre Overview: The retail and leisure service units on Monks Road are located approximately 1km to the east of Lincoln city centre, fronting the B1308 Monks Road (one of the key routes into the centre). As a result, there is a constant stream of vehicular and pedestrian traffic passing the centre, with the Co-op store and Post Office appearing to be the most popular retail units on Monks Road.

Diversity of Uses: A total of seven units were identified on Monks Road during the site visit, including:

- Two convenience units (Co-op (including a Post Office) and newsagent);
- Three retail service units (laundrette, hairdressers and beauty salon); and
- One leisure unit (take-away).

Table 13: Diversity of Uses on Monks Road (July 2011)

	Number of Units		
	Number	Monks Road	UK*
Convenience	2	28.6%	8.6%
Comparison	0	0.0%	33.5%
Retail Service	3	42.9%	13.2%
Leisure Service	1	14.3%	21.7%
Financial and Business Service	0	0.0%	11.0%
Vacant	1	14.3%	11.7%
Total	**7**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified one vacant unit on Monks Road, the former Bike Mart Direct Ltd unit.

Representation from National Retailers: There are two national retailers located on Monks Road, namely the Post Office and the Co-op store.

11. Monks Road

Photographs of Monks Road (July 2011)

Photograph 61 (top left): Co-op store
Photograph 62 (top centre): Vacant unit (former Bike Mart Direct Ltd)
Photograph 63 (top right): Monks Road units
Photograph 64 (bottom left): Monks Road
Photograph 65 (bottom centre: newsagent unit
Photograph 66 (bottom right): Monk Road units

12. Navenby

Status: Service Village – North Kesteven Local Plan (2007)

Centre Overview: Navenby is located approximately 16km to the south of Lincoln city centre, with the A607 (Grantham Road) route running through the centre of the village. The retail and service units in Navenby are arranged in a linear pattern on the High Street, with on-street parking bays provided in front of many of the units. A small business centre office is also located in Navenby.

Diversity of Uses: A total of 22 units were identified in Navenby during the site visit, including:
- Three convenience units (Co-op, a bakery and newsagent);
- Four comparison units (dress shop, antiques shop, gift shop and pharmacy);
- Five retail service units (engravers, travel agents, photographers studio, hairdressers and beauty salon); and
- Eight leisure units (three take-aways, two cafes, two public houses and one B&B).

Table 14: Diversity of Uses in Navenby (July 2011)

Number of Units			
	Number	Navenby	UK*
Convenience	3	13.6%	8.6%
Comparison	4	18.2%	33.5%
Retail Service	5	22.7%	13.2%
Leisure Service	8	36.4%	21.7%
Financial and Business Service	0	0.0%	11.0%
Vacant	2	9.1%	11.7%
Total	**22**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified two vacant units in Navenby.

Representation from National Retailers: There is a single national retailer located in Navenby, this being the Co-op store.

12. Navenby

Photographs of Navenby (July 2011)

Photograph 67 (top left): Vacant unit, High Street
Photograph 68 (top centre): Navenby village centre
Photograph 69 (top right): Co-op unit, High Street
Photograph 70 (bottom left): Newsagent unit, High Street
Photograph 71 (bottom centre: Take-away units, High Street
Photograph 72 (bottom right): High Street units

13. Nettleham

Status: Primary Rural Settlement – West Lindsey Local Plan (2006)

Centre Overview: Nettleham is located to the east of the A46 (Welton Road), approximately 6km to the north east of Lincoln city centre. The majority of the retail units are concentrated on High Street and Church Street, with several units also surrounding the village green.

Diversity of Uses: A total of 15 units were identified in Nettleham during the site visit, including:

- Three convenience units (Co-op (including a Post Office), newsagent and a butcher);
- Two comparison units (florist and Co-op pharmacy);
- Five retail service units (two beauty salons, two hairdressers and an opticians);
- Four leisure units (three public houses and a take-away unit); and
- One financial and business service unit.

Table 15: Diversity of Uses in Nettleham (July 2011)

Number of Units			
	Number	Nettleham	UK*
Convenience	3	20.0%	8.6%
Comparison	2	13.3%	33.5%
Retail Service	5	33.3%	13.2%
Leisure Service	4	26.7%	21.7%
Financial and Business Service	1	6.7%	11.0%
Vacant	0	0.0%	11.7%
Total	**15**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified no vacant units in Nettleham.

Representation from National Retailers: There is one national retailer located in Nettleham, namely the Co-op foodstore (and Post Office) and separate Co-op pharmacy unit.

13. Nettleham

Photographs of Nettleham (July 2011)

Photograph 73 (top left): Church Street
Photograph 74 (top centre): Co-op Pharmacy, Church Street
Photograph 75 (top right): Church Street
Photograph 76 (bottom left): The Green
Photograph 77 (bottom centre): Hairdressers, High Street
Photograph 78 (bottom right): Co-op and Post Office, Church Street

14. Nettleham Road

Status: District Mixed-use Centre – City of Lincoln Local Plan (1998)

Centre Overview: Nettleham Road (the B1182) is located approximately 2.5km to the north of Lincoln city centre and includes a purpose built shopping centre to the south and a large Waitrose store to the north on Searby Road. The shopping centre comprises a number of convenience, comparison and leisure units and appear to be a popular destination for local residents. Its popularity is supported by the presence of key retailers such as Waitrose and Asda.

Diversity of Uses: A total of 16 units were identified on Nettleham Road during the site visit, including:

- Four convenience units (Asda, Iceland, Waitrose and an off-licence);
- Four comparison units (two charity shops, a pet shop and mobility centre);
- Three retail service units (a Post Office and two barbers); and
- Five leisure units (three take-aways, Pizza Hut and KFC).

Table 16: Diversity of Uses on Nettleham Road (July 2011)

Number of Units			
	Number	Nettleham Road	UK*
Convenience	4	25.0%	8.6%
Comparison	4	25.0%	33.5%
Retail Service	3	18.8%	13.2%
Leisure Service	5	31.2%	21.7%
Financial and Business Service	0	0.0%	11.0%
Vacant	0	0.0%	11.7%
Total	**16**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified no vacant units on Nettleham Road.

Representation from National Retailers: There are six national retailers located on Nettleham Road, namely Asda, Iceland, KFC, Pizza Hut, Post Office and the Waitrose foodstore.

14. Nettleham Road

Photographs of Nettleham Road (July 2011)

Photograph 79 (top left): Waitrose, Searby Road
Photograph 80 (top centre): Pizza Hut
Photograph 81 (top right): Asda Supermarket
Photograph 82 (bottom left): Post Office
Photograph 83 (bottom centre: Nettleham Road Shopping Centre
Photograph 84 (bottom right): KFC

15. Newark Road (Bracebridge)

Status: District Mixed-use Centre – City of Lincoln Local Plan (1998)

Centre Overview: The Bracebridge area of Newark Road (A1434) is located approximately 3km to the south of Lincoln city centre, with retail and service units located on both sides of the busy route into the centre. The Tesco Express store and ATM appeared to be a popular retail destination for local residents. Pedestrian crossing points are dispersed along Newark Road which allow pedestrian movement between the units on either side of the highway. A library is also located on Newark Road (Bracebridge).

Diversity of Uses: A total of 21 units were identified on Newark Road (Bracebridge) during the site visit, including:

- Two convenience units (Tesco Express and Premier minimarket);
- Nine comparison units (DIY store, heating store, electrical store, computer shop, pet shop, cycle shop, motorcycle shop, charity shop and clothes shop);
- Three retail service units (hairdressers, Rent-a-Car and Kwik Fit vehicle repair centre); and
- Five leisure units (three take-aways, a café and public house).

Table 17: Diversity of Uses on Newark Road (Bracebridge) (July 2011)

Number of Units			
	Number	Newark Road	UK*
Convenience	2	9.5%	8.6%
Comparison	9	42.9%	33.5%
Retail Service	3	14.3%	13.2%
Leisure Service	5	23.8%	21.7%
Financial and Business Service	0	0.0%	11.0%
Vacant	2	9.5%	11.7%
Total	**21**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified two vacant units on Newark Road.

Representation from National Retailers: There are four national retailers located on Newark Road (Bracebridge).

15. Newark Road (Bracebridge)

Photographs of Newark Road (Bracebridge) (July 2011)

Photograph 85 (top left): Tesco Express unit
Photograph 86 (top centre): Vacant unit
Photograph 87 (top right): Cafe
Photograph 88 (bottom left): DIY store and vacant unit
Photograph 89 (bottom centre: Premier convenience store
Photograph 90 (bottom right): Newark Road

16. North Hykeham

Status: Service Centre – North Kesteven Local Plan (2007)

Centre Overview: The North Hykeham centre is located approximately 8km to the south-west of Lincoln city centre. As noted in the North Kesteven Retail and Commercial Leisure Study (Roger Tym, July 2007), North Hykeham can be broken down into four distinctive areas, these being: the stand-alone Asda store; the purpose-built Forum shopping centre; units on the junction of Station Road/Newark Road; and Old Hykeham. Table 17 contains the data for all four of the areas combined.

Table 18 Diversity of Uses in North Hykeham (Combined) (July 2011)

Number of Units			
	Number	North Hykeham	UK*
Convenience	9	15.8%	8.6%
Comparison	17	29.8%	33.5%
Retail Service	9	15.8%	13.2%
Leisure Service	13	22.8%	21.7%
Financial and Business Service	8	14.0%	11.0%
Vacant	1	1.8%	11.7%
Total	**57**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified one vacant unit in North Hykeham.

Representation from National Retailers: There are fourteen national retailers located in North Hykeham.

Photograph 91: Asda unit, Newark Road

16. North Hykeham – The Forum

Centre Overview: The Forum centre is located on the A1434 Newark Road, and is the closest of the four distinct areas in North Hykeham to Lincoln city centre. The Forum is anchored by a Tesco Express store (former Somerfield), which opened for trading in February 2008. The purpose built shopping centre appeared extremely busy on the day of the visit, with the car parks to the front and rear of the centre almost fully occupied. The lack of vacant units in The Forum also demonstrates that the centre is performing well.

Diversity of Uses: A total of 28 units were identified in The Forum during the site visit, including:

- Four convenience units (Tesco, CTN (Martins) and two bakeries);
- Eight comparison units (two charity shops, Co-op pharmacy, motorparts unit, book shop, florist, shopmobility centre and a card shop);
- Three retail service units (Post Office, tanning salon and dry cleaners);
- Five leisure units (three take-away units/restaurants, café and Bet Fred); and
- Eight financial and business service units (four banks (including Lloyds TSB and Barclays) and four estate agents (including Your Move, Reeds Rains and Martin & Co)).

Table 19: Diversity of Uses in The Forum (July 2011)

Number of Units			
	Number	The Forum	UK*
Convenience	4	14.3%	8.6%
Comparison	8	28.6%	33.5%
Retail Service	3	10.7%	13.2%
Leisure Service	5	17.9%	21.7%
Financial and Business Service	8	28.6%	11.0%
Vacant	0	0.0%	11.7%
Total	**28**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified no vacant units in The Forum.

Representation from National Retailers: There are ten national retailers located in The Forum, namely the Post Office, Tesco, Martins convenience store, Co-op foodstore, Lloyds TSB bank, Barclays bank, Your Move estate agent, Bet Fred bookmakers, Reeds Rains estate agent and Martin & Co estate agent.

16. North Hykeham - The Forum

Photographs of The Forum (July 2011)

Photograph 92 (top left): Shopping Parade, The Forum
Photograph 93 (top centre): Tesco Express, The Forum
Photograph 94 (top right): BetFred Betting shop, The Forum
Photograph 95 (bottom left): Post Office, The Forum
Photograph 96 (bottom centre: Central car park, The Forum
Photograph 97 (bottom right): Martin's convenience store, The Forum

16. North Hykeham-Station Road/Newark Road

Centre Overview: The retail and service units at this location are concentrated at the junction of Station Road and Newark Road, approximately 1km to the south of The Forum centre and 0.5km to the south of the Asda store, North Hykeham. During the site visit, it was noted that there appeared to be little pedestrian movement between the units, with the busy road junction and lack of parking appearing to deter shoppers to undertake linked trips to the stores.

Diversity of Uses: A total of 16 units were identified on Station Road/Newark Road during the site visit, including:

- Three convenience units (Spar convenience store, shoe repairs/key cutter unit and a newsagents);
- Six Comparison (cycle shop, hardware shop, charity shop, pharmacy, computer shop and gift shop);
- Three retail service units (a laundrette, barbers and hairdressers); and
- Four leisure units (four take away units).

Table 20: Diversity of Uses on Station Road/Newark Road (July 2011)

Number of Units			
	Number	Station/Newark Rd	UK*
Convenience	3	18.8%	8.6%
Comparison	6	37.5%	33.5%
Retail Service	3	18.8%	13.2%
Leisure Service	4	25.0%	21.7%
Financial and Business Service	0	0.0%	11.0%
Vacant	0	0.0%	11.7%
Total	**16**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified no vacant units on Station Road/Newark Road.

Representation from National Retailers: There is one national retailer located on Station Road/Newark Road, namely the Spar foodstore.

16. North Hykeham-Station Road/Newark Road

Photographs of Station Road/Newark Road (July 2011)




Photograph 98 (top left): Shoes repairs/key cutter unit, Moor Lane
Photograph 99 (top centre): Spar, Newark Road
Photograph 100 (top right): Furniture and gift shop, Newark Road
Photograph 101 (bottom left): Take away and DIY store, Newark Road
Photograph 102 (bottom centre): Newark Road
Photograph 103 (bottom right): Take-away unit, Newark Road

16. North Hykeham – Old Hykeham

Centre Overview: Old Hykeham comprises a purpose built shopping centre and adjacent units, to the south of the Asda store in North Hykeham. The vehicular access to the centre is available off Lincoln Road. The centre appeared to be trading extremely well on the day of the site visit, with the car park to the centre almost full. There is also a medical centre and physiotherapist in Old Hykeham.

Diversity of Uses: A total of 12 units were identified in Old Hykeham on the site visit, including:

- One convenience unit (Co-op);
- Three comparison units (Co-op pharmacy, florist and pet shop);
- Three retail service units (Post Office, opticians and hairdressers); and
- Four leisure units (Bet Fred, café, take-away and public house).

Table 21: Diversity of Uses in Old Hykeham (July 2011)

Number of Units			
	Number	Old Hykeham	UK*
Convenience	1	7.1%	8.6%
Comparison	3	21.4%	33.5%
Retail Service	3	21.4%	13.2%
Leisure Service	4	28.6%	21.7%
Financial and Business Service	0	0.0%	11.0%
Vacant	1	7.1%	11.7%
Total	**12**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified one vacant unit in Old Hykeham, namely the former Premier convenience store.

Representation from National Retailers: There are three national retailers located in Old Hykeham, namely the Co-Op foodstore and pharmacy, Bet Fred bookmakers and the Post Office.

16. North Hykeham – Old Hykeham

Photographs of Old Hykeham (July 2011)

Photograph 104 (top left): Car park and medical practice
Photograph 105 (top centre): Bet Fred
Photograph 106 (top right): Co op food store and pharmacy
Photograph 107 (bottom left): Pet shop and opticians
Photograph 108 (bottom centre: Florist and take-away units
Photograph 109 (bottom right): Vacant unit, former Premier convenience store

17. Ruskington

Status: Service Village – North Kesteven Local Plan (2007)

Centre Overview: Ruskington is located approximately 7km to the north of Sleaford town centre (via the A153). The majority of the units are located on High Street (North and South), Silver Street and Church Street. The centre appeared relatively quiet on the day of the site visit, with the Co-op store attracting the most vehicular and pedestrian activity. A GP's surgery is also located in Ruskington.

Diversity of Uses: A total of 33 units were identified in Ruskington on the site visit, including:

- Seven convenience units (Co-op, One Stop convenience store, two butchers, two bakers and a farm shop);
- Ten comparison units (flooring shop, charity shop, card shop, florist, clothes shop, furniture store, sweet shop, domestic appliances store, carpet shop and craft shop);
- Six retail service units (two hairdressers, a barber, beauty salon, dog grooming unit and opticians);
- Eight leisure units (five take-away units, two cafes and a public house); and
- Two financial and business services (estate agent and financial services unit).

Table 22: Diversity of Uses in Ruskington (July 2011)

Number of Units			
	Number	Ruskington	UK*
Convenience	7	21.2%	8.6%
Comparison	10	30.3%	33.5%
Retail Service	6	18.2%	13.2%
Leisure Service	8	24.2%	21.7%
Financial and Business Service	2	6.1%	11.0%
Vacant	0	0.0%	11.7%
Total	**33**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified no vacant units in Ruskington.

Representation from National Retailers: There are two national retailers located in Ruskington, namely the Co-op foodstore and the One Stop convenience store.

17. Ruskington

Photographs of Ruskington (July 2011)

Photograph 110 (top left): Bakers and hairdressers, High Street North
Photograph 111 (top centre): Bakers and take-away unit, High Street North
Photograph 112 (top right): Co-op unit, High Street North
Photograph 113 (bottom left): Flooring unit, High Street North
Photograph 114 (bottom centre: Take-away units, High Street South
Photograph 115 (bottom right): One Stop convenience store and financial services unit, High Street South

18. Saxilby

Status: Primary Rural Settlement – West Lindsey Local Plan (2006)

Centre Overview: Saxilby is located to the north of the A57 Gainsborough Road/Lincoln Road, with a rail station to the south-west of the centre. The retail and service units are primarily located on High Street and Bridge Street. Saxilby also contains a library and village hall. The site appeared to be quiet on the day of the site visit, though the small car park at the Co-op store appeared to be busy.

Diversity of Uses: A total of 14 units were identified in Saxilby during the site visit, including:
- Three convenience units (Co-op, One Stop convenience store and a butcher);
- Two comparison units (charity shop and car dealership);
- Three retail service units (Post Office and two hairdressers); and
- Five leisure units (two take-away units, two public houses and a cafe).

Table 23: Diversity of Uses in Saxilby (July 2011)

Number of Units			
	Number	Saxilby	UK*
Convenience	3	21.4%	8.6%
Comparison	2	14.3%	33.5%
Retail Service	3	21.4%	13.2%
Leisure Service	5	35.7%	21.7%
Financial and Business Service	0	0.0%	11.0%
Vacant	1	7.1%	11.7%
Total	**14**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified one vacant unit in Saxilby.

Representation from National Retailers: There are three national retailers located in Saxilby, namely the Co-op, One Stop convenience store and the Post Office.

18. Saxilby

Photographs of Saxilby (July 2011)

Photograph 116 (top left): One Stop store and ATM, High Street
Photograph 117 (top centre): Charity shop, Bridge Street
Photograph 118 (top right): Bridge Street
Photograph 119 (bottom left): Eclipse hairdressers, High Street
Photograph 120 (bottom centre): Co-op Store, High Street
Photograph 121 (bottom right): Post Office, High Street

19. Scotter

Status: Primary Rural Settlement – West Lindsey Local Plan (2006)

Centre Overview: Scotter is located to the south of Junction 3 and 4 of the M180, with Gainsborough located 15km to the south-west. The centre is concentrated on the junction of High Street and Gainsborough Road (A159), with the retail units in amongst several residential properties. The Post Office and Premier convenience appeared to be the most popular units in the centre. Scotter village centre appeared to have a good environmental quality, with no signs of vandalism, graffiti or litter.

Diversity of Uses: A total of 15 units were identified in Scotter during the site visit, including:

- Three convenience units (Lifestyle Express, Premier and a butcher);
- Five retail service units (Post Office, two hairdressers, a beauty salon and car servicing centre); and
- Seven leisure units (four take-away units, two public houses and a sandwich shop).

Table 24: Diversity of Uses in Scotter (July 2011)

Number of Units			
	Number	Scotter	UK*
Convenience	3	20.0%	8.6%
Comparison	0	0.0%	33.5%
Retail Service	5	33.3%	13.2%
Leisure Service	7	46.7%	21.7%
Financial and Business Service	0	0.0%	11.0%
Vacant	0	0.0%	11.7%
Total	**15**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified no vacant units in Scotter.

Representation from National Retailers: There are three national retailers located in Scotter, namely a Lifestyle Express, Premier convenience store and a Post Office.

19. Scotter

Photographs of Scotter (July 2011)

Photograph 122 (top left): The Post Office, The Green
Photograph 123 (top centre): Premier village convenience store, Hobb Lane
Photograph 124 (top right): Take-away units, Prospect Close/Messingham Road
Photograph 125 (bottom left): Take-away unit, High Street
Photograph 126 (bottom centre): Lifestyle Express convenience store, High Street
Photograph 127 (bottom right): The Sun and Anchor public house, High Street

20. The Junction

Status: District Mixed-Use Centre - City of Lincoln Local Plan (1998)

Centre Overview: The Junction of Boultham Park Road and Skellingthorpe Road is located approximately 2km to the south of Lincoln city centre. The Co-op and Premier convenience units appeared to be the most frequently visited stores. There is limited parking space available in front of the units, with most shoppers tending to use the on-street parking along Boultham Park and Skellingthorpe Road.

Diversity of Uses: A total of 11 units were identified at The Junction during the site visit, including:

- Four convenience units (Co-op, Premier (including a Post Office), a grocer and bakers);
- One comparison unit (Co-op pharmacy);
- One retail service unit (hairdressers); and
- Five leisure units (three take-away units, a public house and Coral bookmakers).

Table 25: Diversity of Uses at The Junction (July 2011)

Number of Units			
	Number	The Junction	UK*
Convenience	4	36.4%	8.6%
Comparison	1	9.1%	33.5%
Retail Service	1	9.1%	13.2%
Leisure Service	5	45.4%	21.7%
Financial and Business Service	0	0.0%	11.0%
Vacant	0	0.0%	11.7%
Total	**11**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified no vacant units at The Junction.

Representation from National Retailers: There are four national retailers located at The Junction, namely a Premier convenience store, Co-op, Coral and a Post Office.

20. The Junction

Photographs of The Junction (July 2011)


Photograph 128 (top left): Moorland Avenue
Photograph 129 (top centre): Coral bookmakers
Photograph 130 (top right): Co-op Pharmacy
Photograph 131 (bottom left): Premier convenience store
Photograph 132 (bottom centre): The Junction

21. Waddington

Status: Service Village – North Kesteven Local Plan (2007)

Centre Overview: Waddington is located approximately 10km to the south of Lincoln city centre, with the A607 (Grantham Road) running through the centre of the village. The majority of the units are located on Bar Lane, with the medium-sized Budgens store appearing to the most frequently visited unit in Waddington.

Diversity of Uses: A total of 12 units were identified in Waddington during the site visit, including:

- Two convenience units (Budgens and the Old Village Store);
- Two comparison units (Co-op pharmacy and a florist);
- Three retail service units (Post Office and two beauty salons); and
- Five leisure units (three take-away units, a public house and a sandwich shop).

Table 26: Diversity of Uses at Waddington (July 2011)

Number of Units			
	Number	Waddington	UK*
Convenience	2	16.7%	8.6%
Comparison	2	16.7%	33.5%
Retail Service	3	25.0%	13.2%
Leisure Service	5	41.6%	21.7%
Financial and Business Service	0	0.0%	11.0%
Vacant	0	0.0%	11.7%
Total	**12**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified no vacant units in Waddington.

Representation from National Retailers: There are three national retailers located in Waddington, namely a Budgens, Co-op and a Post Office.

21. Waddington

Photographs of Waddington (July 2011)




Photograph 133 (top left): Florist, Bar Lane
Photograph 134 (top centre): Budgens convenience store, Bar Lane
Photograph 135 (top right): Public house, High Street
Photograph 136 (bottom left): Old Village Store, Bar Lane/High Street
Photograph 137 (bottom centre): Post Office and Co-op pharmacy, Bar Lane
Photograph 138 (bottom right): Take-away units, Bar Lane

22. Welton

Status: Primary Rural Settlement – West Lindsey Local Plan (2006)

Centre Overview: Welton is located approximately 9km to the north east of Lincoln city centre (via the A46), with the centre appearing to be a popular and well-used retail destination for local residents. The Co-op store in particular includes a pharmacy and Post Office and appeared to be the busiest unit on the day of the site visit. Welton also contains a library and dentist.

Diversity of Uses: A total of nine units were identified in Welton during the site visit, including:

- Two convenience units (Co-op foodstore (including a pharmacy and Post Office) and newsagent);
- Two comparison units (florist and pet shop);
- One retail service unit (hairdressers); and
- Four leisure units (two take-aways, a sandwich shop and public house).

Table 27: Diversity of Uses in Welton (July 2011)

Number of Units			
	Number	Welton	UK*
Convenience	2	22.2%	8.6%
Comparison	2	22.2%	33.5%
Retail Service	1	11.1%	13.2%
Leisure Service	4	44.4%	21.7%
Financial and Business Service	0	0.0%	11.0%
Vacant	0	0.0%	11.7%
Total	**9**	**100%**	**100%**

Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified no vacant units in Welton.

Representation from National Retailers: There are two national retailers located in Welton, namely the Co-op foodstore and Post Office.

22. Welton

Photographs of Welton (July 2011)






Photograph 139 (top left): Co-op unit, Cliff Road
Photograph 140 (top centre): Hairdressers, Lincoln Road
Photograph 141 (top right): Florist, Lincoln Road
Photograph 142 (bottom left): Welton, Lincoln Road
Photograph 143 (bottom centre): Pub, Lincoln Road
Photograph 144 (bottom right): Take-away unit, Cliff Road

23. Wragby Road

Status: District Mixed-use Centre – City of Lincoln Local Plan (1998)

Centre Overview: Wragby Road is located approximately 1.5km to the north-east of Lincoln city centre, close to the Carlton Centre retail park. The largest and most visited unit is the 24-hour Tesco supermarket, with the other small units dispersed evenly along Wragby Road.

Diversity of Uses: A total of 18 units were identified on Wragby Road during the site visit, including:

- Four convenience units (Tesco, newsagent, butcher and off-licence);
- Five comparison units (three furniture stores, car sales and children's wear unit);
- Four retail service units (barber, tattooist, beauty salon and car repairs garage); and
- Five leisure units (three take-aways, Coral bookmakers and a public house).

Table 28: Diversity of Uses in Wragby Road (July 2011)

	Number of Units		
	Number	Wragby Road	UK*
Convenience	4	22.2%	8.6%
Comparison	5	27.8%	33.5%
Retail Service	4	22.2%	13.2%
Leisure Service	5	27.8%	21.7%
Financial and Business Service	0	0.0%	11.0%
Vacant	0	0.0%	11.7%
Total	**18**	**100%**	**100%**

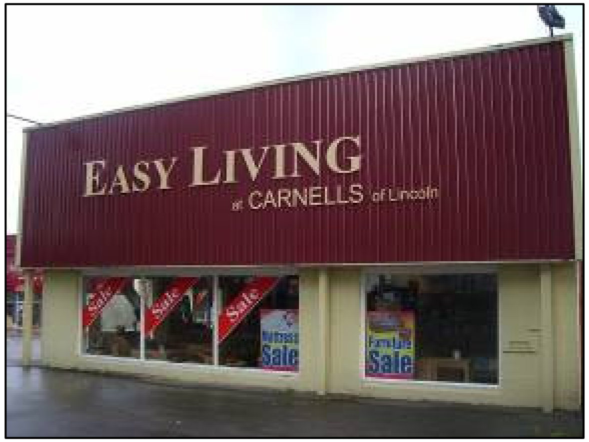
Source: Site Visit, July 2011, * UK Average Figure, Goad, April 2011

Vacancy Rates: The site visit in July 2011 identified no vacant units on Wragby Road.

Representation from National Retailers: There are two national retailers located on Wragby Road, namely a Tesco store and a Coral bookmakers.

23. Wragby Road

Photographs of Wragby Road (July 2011)



Photograph 145 (top left): Tesco store
Photograph 146 (top centre): Wragby Road
Photograph 147 (top right): Furniture unit
Photograph 148 (bottom left): Car sales unit
Photograph 149 (bottom centre): Furniture units
Photograph 150 (bottom right): Barber unit