

## Appendix 1 – Impact Assessment

Impact Assessment

Table 1 - Proposed Turnover of Convenience Floorspace in the Three Settlements

	Gross Internal Area (sq.m)	Net Sales Floorspace (sq.m)	Net Convenience Floorspace (sq.m)	Sales Density	Turnover at 2021	Turnover at 2026
Convenience Floorspace - Spilsby	-	-	1,100	9,878	10.9	11.4
Convenience Floorspace - Horncastle	-	-	1,300	9,878	12.8	13.4
Convenience Floorspace - Skegness	-	-	1,400	9,878	13.8	14.5
Convenience Floorspace - Louth	-	-	1,800	9,878	17.8	18.6

Notes

- a. Proposal foodstore net sales area based on our understanding of operational requirements
- b. Convenience goods sales density for proposal foodstore based on company averages of Aldi and Lidl as derived from GlobalData 2021
- c. Turnover of units to 2026 adjusted in accordance with recommendations provided at Figures 4a and 4b of Experian Retail Planner Briefing Note 19

2019 Prices

Impact Assessment

Table 2 - Impact Assessment

Destination	Survey Derived Turnover at 2026			Benchmark Turnover at 2026	Spilsby Post			Horncastle Post			Skegness Post			Louth Post			Cumulative		Over/Under trading post development				
	Main food (£m)	Top-up (£m)	Total (£m)		Trade Diversion to Proposal (Spilsby)	Diversion Turnover (£m)	Solus Impact (%)	Trade Diversion to Proposal (Horncastle)	Diversion Turnover (£m)	Solus Impact (%)	Trade Diversion to Proposal (Skegness)	Diversion Turnover (£m)	Solus Impact (%)	Trade Diversion to Proposal (Louth)	Diversion Turnover (£m)	Solus Impact (%)	Cumulative Diversion (£m)	Solus Impact (%)					
	%	£m	£m		%	£m	%	%	£m	%	%	£m	%	%	£m	%	£m	%		%			
<b>Study Area</b>																							
<b>Zone 1</b>																							
Aldi, Burgh Road, Skegness	23.5	2.3	25.7	11.5	15%	1.7	24.0	6.6%	5%	0.7	25.1	2.6%	20%	2.9	22.8	11.2%	3%	0.5	25.3	1.8%	5.7	22.3%	174%
Lidl, Richmond Drive, Skegness	10.9	1.7	12.6	9.7	5.0%	0.6	12.0	4.5%	0%	0.0	12.6	0.0%	20%	2.9	9.7	23.0%	0%	0.0	12.6	0.0%	3.5	27.5%	94%
M&S Foodhall, Burgh Road, Skegness	5.3	1.4	6.7	8.8	0%	0.0	6.7	0.0%	0%	0.0	6.7	0.0%	5%	0.7	6.0	10.8%	0%	0.0	6.7	0.0%	0.7	10.8%	68%
Morrisons, Wainfleet Road, Skegness	28.8	1.9	30.7	31.9	10.0%	1.1	29.5	3.7%	0%	0.0	30.7	0.0%	10%	1.4	29.2	4.7%	0%	0.0	30.7	0.0%	2.6	8.4%	88%
Tesco Superstore, Richmond Drive, Skegness	24.2	2.2	26.3	33.9	10%	1.1	25.2	4.3%	5%	0.7	25.7	2.6%	10%	1.4	24.9	5.5%	0%	0.0	26.3	0.0%	3.3	12.4%	68%
<b>Zone 4</b>																							
Sainsbury's Superstore, Boston Road, Spilsby	13.3	4.5	17.7	7.5	40%	4.5	13.2	25.6%	0%	0.0	17.7	0.0%	5%	0.7	17.0	4.1%	0%	0.0	17.7	0.0%	5.3	29.7%	165%
<b>Zone 5</b>																							
Co-op, Conging Street, Horncastle	4.2	3.4	7.6	7.6	0%	0.0	7.6	0.0%	5%	0.7	6.9	8.9%	0%	0.0	7.6	0.0%	0%	0.0	7.6	0.0%	0.7	8.9%	92%
Co-op, High Street, Horncastle	1.4	2.0	3.4	3.9	0%	0.0	3.4	0.0%	5%	0.7	2.8	19.6%	0%	0.0	3.4	0.0%	0%	0.0	3.4	0.0%	0.7	19.6%	71%
Heron Foods, Market Place, Horncastle	1.4	1.4	2.8	3.3	0%	0.0	2.8	0.0%	5%	0.7	2.2	23.7%	0%	0.0	2.8	0.0%	0%	0.0	2.8	0.0%	0.7	23.7%	66%
Local shops, Horncastle Town Centre	0.1	1.3	1.4	1.4	0%	0.0	1.4	0.0%	0%	0.0	1.4	0.0%	0%	0.0	1.4	0.0%	0%	0.0	1.4	0.0%	0.0	0.0%	97%
Sainsbury's Local, Tattershall Road, Woodhall Spa	1.5	1.1	2.7	5.3	0%	0.0	2.7	0.0%	0%	0.0	2.7	0.0%	0%	0.0	2.7	0.0%	0%	0.0	2.7	0.0%	0.0	0.0%	50%
Tesco Superstore, Watermill Road, Horncastle	18.4	2.9	21.3	10.3	0%	0.0	21.3	0.0%	45%	6.0	15.3	28.4%	0%	0.0	21.3	0.0%	0%	0.0	21.3	0.0%	6.0	28.4%	149%
<b>Zone 7</b>																							
Aldi, Newbridge Hill, Louth	41.3	4.0	45.3	11.7	0%	0.0	45.3	0.0%	10%	1.3	43.9	3.0%	0%	0.0	45.3	0.0%	35%	6.5	38.8	14.4%	7.9	17.4%	319%
Co-op, Manby Middlegate, Grimsby, Louth	0.7	1.9	2.6	3.0	0%	0.0	2.6	0.0%	0%	0.0	2.6	0.0%	0%	0.0	2.6	0.0%	0%	0.0	2.6	0.0%	0.0	0.0%	88%
Co-op, Newbridge Hill, Louth	1.4	1.9	3.3	3.6	0%	0.0	3.3	0.0%	0%	0.0	3.3	0.0%	0.0%	0.0	3.3	0.0%	0.0%	0.0	3.3	0.0%	0.0	0.0%	91%
Co-op, Newmarket, Louth	1.5	4.2	5.7	3.6	0%	0.0	5.7	0.0%	0%	0.0	5.7	0.0%	0%	0.0	5.7	0.0%	2.5%	0.5	5.3	8.1%	0.5	8.1%	147%
Co-op, Northgate, Louth	4.3	2.4	6.7	14.2	0%	0.0	6.7	0.0%	0%	0.0	6.7	0.0%	0%	0.0	6.7	0.0%	2.5%	0.5	6.2	7.0%	0.5	7.0%	44%
Heron Foods, Eastgate, Louth	1.4	1.9	3.4	2.9	0%	0.0	3.4	0.0%	0%	0.0	3.4	0.0%	0%	0.0	3.4	0.0%	2.5%	0.5	2.9	13.8%	0.5	13.8%	99%
Morrisons, Eastgate, Louth	24.8	3.6	28.4	15.8	0%	0.0	28.4	0.0%	0%	0.0	28.4	0.0%	0%	0.0	28.4	0.0%	25%	4.7	23.8	16.4%	4.7	16.4%	151%
Other Stores Within and Outside of the Study Area					10%				10%				10%				10%						
Inflow					10%				10%				20%				20%						
<b>Total</b>					100.0%				100.0%				100.0%				100.0%						

- Notes:
- a. Zones based on post code sectors
  - b. Market shares for 'main' and 'top-up' shopping derived directly from 2021 NEMS Household Survey
  - c. Existing survey derived turnover calculated by multiplying the 2026 population and expenditure by survey shopping patterns
  - d. Benchmark turnovers calculated by multiplying net sales area by benchmark sales densities derived from Mintel Retail Rankings 2020