East Lindsey Retail and Economic Assessment

East Lindsey District Council

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1.0 Introduction

Study Objectives

1.1 Nathaniel Lichfield & Partners (NLP) has been commissioned by East Lindsey District Council to prepare a Retail and Economic Assessment considering the potential for new convenience retail floorspace at Louth, Horncastle and Alford.

1.2 The study provides an assessment of the need for retail development and provides a guide to the shopping needs of the three towns up to 2018, 2023 and 2028.

1.3 The document will inform the Council's work on the emerging Local Development Framework, Supplementary Planning Documents and management plans for individual town centres. The key objectives of the study are as follows:

1 An assessment of the future retail needs and (residual) capacity of Louth, Horncastle and Alford towns to support additional supermarket floorspace for the period up to 2028;

2 The identification of any impacts (positive and negative) that new food store development, including edge and out of centre provision, will have on the vitality and sustainability of the respective town centres and to identify the necessary actions required to mitigate against those impacts; and

3 The identification of broad locations/sites for accommodating future food store development commensurate within the findings of the report, including an assessment of future need.

1.4 The floorspace projections shown in this report provide broad guidance and should be used as an indicator when assessing major retail proposals within the District.

Report Structure

1.5 The remainder of the report is structured as follows:

- Section 2: provides a description of the hierarchy of centres within the District and describes existing retail facilities, the roles of the three towns, and the relationship between these centres;
- Section 3: sets out a quantitative and qualitative analysis of current and future retail trends and the need for new retail facilities within Louth, Horncastle and Alford;
- Section 4: sets out a food store economic impact assessment, including the impact on the vitality and viability of existing centres;
- Section 5: assesses potential food store development sites within the three towns; and

- Section 6: sets out recommendations and conclusions.

Appendices

1.6 A series of Appendices support the Retail and Economic Assessment as follows:

1 Study Area and Methodology

2 Centre Health Checks

3 Convenience Capacity

4 Comparison Capacity

5 Household Survey Results

6 Business Survey Results

7 Site Evaluation

8 Food Store Economic Impact

2.0 The Shopping Hierarchy

2.1 This section of the report describes the existing retail hierarchy in East Lindsey, the role and function of the various centres and the relationship between these and other surrounding centres. Consideration is given to retail provision within the three main towns and existing shopping patterns within the District.

Role of Centres

2.2 East Lindsey is a large rural district bounded by a number of neighbouring authorities (West Lindsey; North East Lincolnshire; North Kesteven and Boston Borough Council). East Lindsey also falls within the catchment area of the sub-regional centres of Lincoln and Grimsby which influence shopping patterns within the District.

2.3 Because of the dispersed nature of the population and towns, the hierarchy of shopping centres within East Lindsey is well defined. Louth, along with Skegness, fulfils an important role as one of the main shopping and commercial centres within East Lindsey, supporting a wide range of employment, shopping, education, recreation, health and community services.

2.4 Because there are no other settlements of similar size or status nearby, Louth's catchment area is extensive and overlaps with the catchment areas of other major centres within, and outside, the District.

2.5 Louth operates above the smaller market towns of Horncastle and Alford within the hierarchy, both of which are identified as town centres, or small market towns. Horncastle and Alford act as secondary centres intended to serve more local catchment areas, below Louth as a main centre in the District.

2.6 The role and function of the retail hierarchy within East Lindsey is further illustrated by Management Horizons Europe’s UK Shopping Index which ranks retail centres across the Great Britain. Each centre is given a weighted score for multiple retailers present (i.e. each retail multiple is given a score related to its importance e.g. a department store has a higher score than other high street retailers). The MHE score does not necessarily reflect the overall size of the town centre or the number of shops, but the presence of national multiples. Towns with a larger number of independent shops may have a low MHE in relation to their overall size. Management Horizon’s rank for centres in East Lindsey and centres surrounding the District is shown in Table 2.1 below.

Table 2.1 Management Horizons Europe Shopping Index

Centre	Rank	MHE Index Score
Kingston upon Hull	13	394
Lincoln	34	294
Grimsby	57	250
Scunthorpe	196	144
Skegness	239	122
Boston	253	117
Louth	**493**	**70**
Cleethorpes	1,175	31
Horncastle	**1,207**	**30**
Market Rasen	1,500	22
Alford	**2,247**	**14**
Mablethorpe	2,356	13
Wragby	4,666	3

Source: Management Horizon Europe 2008

2.7 Management Horizon's index ranks Skegness as the main centre in East Lindsey and is ranked 239th of all centres in the UK. Skegness is followed by Louth ranked at 493rd in the UK. These two centres are ranked well above the centres of Horncastle (1,207th) and Alford (2,247th) reflecting their local role and function in comparison with other larger centres in the sub-region area and their more limited range of comparison goods retailers. Alford is ranked significantly lower than Horncastle reflective of the relative attractiveness of the two towns.

2.8 All four centres within East Lindsey are ranked well below the nearest main competing centres outside the District, i.e. Lincoln and Grimsby, ranked 34th and 57th which have an influence on shopping patterns within the District, mainly for higher order comparison retailing.

Existing Retail Provision

2.9 Existing retail provision in the three towns is contained in detailed health check assessments included in **Appendix 3**. A summary of existing retail provision for each town is provided below:

Table 2.2 Existing Retail Service Provision

Centre	Primary Catchment Area Population	Town Centre Shop Units	Convenience Goods Sales Floorspace Sq M Net	Comparison Goods Sales Floorspace Sq M Net
Louth	30,245	287	4,265	13,835
Horncastle	10,093	137	2,653	3,600
Alford	8,520	82	664	1,400

Source: NLP Land Use Survey

Louth

2.10 Louth has a good range and choice of comparison shopping commensurate with its role as one of the main comparison shopping and leisure destinations in the District.

2.11 Whilst the centre has a good range of quality independent convenience provision (butchers, bakers, greengrocers and fishmongers) and an edge of centre superstore (Morrison's), food store provision within the centre is limited to small scale supermarkets with a more limited range of provision.

2.12 All categories of comparison retail are represented within the centre. The centre has a good proportion of national multiple retailers and a number of key retailers alongside a good range of independent retailers which adds interest and variety to the centre. The centre provides a good range of service facilities and uses complementary to its main shopping role, including leisure and entertainment facilities. Secondary areas within the centre are marked by a reduction in national multiples and an increase in hot food takeaways.

2.13 The centre has a very low vacancy rate and evidence of a healthy turnover of units and retail letting market. Shopping streets appear to be busy and lively with high levels of footfall. Regular indoor and outdoor markets add further interest and footfall to the centre.

2.14 Whilst the physical environment in Louth is of high quality within a rural historic centre, the centre does not benefit from any pedestrianised areas and pedestrian movement in places is restricted by narrow pavements and close proximity to vehicular traffic in the town. The centre has good public transport links by bus but no central railway station and traffic and parking within the centre can be a problem.

Horncastle

2.15 Whilst Horncastle has a good range and choice of both convenience and comparison shopping, the centre does not offer the same quality and range of facilities available in Louth commensurate with its role and function within the retail hierarchy.

2.16 Food and grocery provision in the centre is good and suitable for both main and top up food shopping. The proportion of clothing and footwear units in particular is significantly below the national average and the town lacks larger national multiple and key retailers.

2.17 All but two of the comparison retailer categories are represented along with a range of independent, particularly antique, shops for which the town is well known. The centre provides a good range of service facilities similar to that of the national average and a more limited range of leisure and entertainment facilities.

2.18 The vacancy rate is very low at only half that of the national average, demonstrating that demand for premises remains strong.

2.19 The centre is characterised by a very high quality environment with heritage buildings throughout the centre. However, none of the centre is pedestrianised leading to occasional conflicts with pedestrian and segregation on different sides of shopping streets. The centre has good public transport links by bus but no central railway station. Accessibility to the centre appears to be mainly by car with associated problems of parking.

Alford

2.20 Alford town centre does not offer the same quality and range of facilities available in either Louth or Horncastle, despite being ranked level with Horncastle in the retail hierarchy and providing one of the main retail and leisure destinations in the District.

2.21 Food and grocery provision in the centre is only suitable for top up food shopping as the centre only contains a Co-op and other small scale convenience good units.

2.22 The centre provides a range of retail and service uses with the majority of comparison categories represented, albeit a limited range of national multiples are present in the town and there is an absence of key retailers.

2.23 Vacancy rates are above the national average. There is a limited supply of premises available to accommodate new operators looking to trade in Alford. Furthermore, all vacant units are small, limiting their attractiveness to certain retailers.

2.24 The centre is not pedestrianised and does not provide a high quality environment. The centre has good public transport accessibility and provision of car parking for shoppers.

Current Shopping Patterns

2.25 NEMS Market Research carried out a telephone survey of 500 households across the East Lindsey study area in March 2012. The study area was split into three zones, based on the postcode sectors of the three study towns of Louth, Horncastle and Alford. A plan of the catchment area adopted is provided in **Appendix 1**.

2.26 In terms of food shopping, large food stores are the main destination for respondents' last main food shopping trip across the study area. Overall, the Morrison's in Louth was the most popular shopping destination for the study area as a whole (26.4%), followed by Tesco in Horncastle (13.1%). This is closely followed by the Co-op at Northgate, Louth (11.9%).

2.27 Top-up shopping trips are dispersed over a larger number of stores, with the most popular two stores overall – Morrison's, Louth and Co-op Northgate, Louth – accounting for just 11.7% and 8.5% of trips respectively. "Local shops" in the Study Area account for 31.7% of all responses.

2.28 Considering the frequency and value of linked trips within the various centres, respondents were asked if they carry out any other activities while they were on their last main food shop. 61.6% of respondents confirmed that they did carry out any other forms of activity. The most popular activity was to carry out non food shopping at the same time (30.4%), followed by going shopping for other food items (27%) and visiting a bank or post office (21.9%).

2.29 In terms of food and non-food shopping, respondents were asked in which location they buy most of their household's shopping. The most popular destinations for the different categories of food and non food retail items are detailed below:

Table 2.1: Destinations with Highest Proportion of Response

Zone	Louth	Horncastle	Alford
Main Food and Grocery	Louth	Horncastle	Skegness
Top Up Food and Grocery	Louth	Horncastle	Alford
Clothing/Footwear	Grimsby	Lincoln	Grimsby
Domestic Appliances	Louth	Horncastle	Skegness
Electrical Goods	Louth	Horncastle	Skegness
Furniture/Carpets	Louth	Lincoln	Louth
DIY/Hardware	Louth	Horncastle	Louth
Chemist/Beauty	Louth	Horncastle	Alford
Books/CDs/Toys/ Gifts	Louth	Horncastle	Skegness

Source: NEMS Household Survey, March 2012

2.30 Table 2.1 demonstrates that the centres of Grimsby, Lincoln, Louth, Horncastle and Skegness are the most popular centres for non-food shopping for respondents within the catchment area.

2.31 The results of the telephone survey are described in more detail in **Appendix 6**.

Business Survey

2.32 A random survey of business occupiers within the study area was undertaken in May 2012. In total 101 businesses were interviewed in East Lindsey; 50 in Louth; 31 in Horncastle; and 20 in Alford to reflect the relative proportion of businesses in the three towns.

2.33 The occupiers were asked to give their views on a number of issues, including:

- Nature of the business (legal status; type and size; tenure of business premises; length of operation);
- future plans (relocation, extension, re-fits or closure);
- views on current and likely future business performance;

- local benefits and constraints affecting business performance;
- views on the strengths/weaknesses of the town as a place for work and business; and
- views on food store provision within the various centres and the need for further food store provision.

2.34 The results of the business survey are analysed in detail in **Appendix 6**.

3.0 # Assessment of Retail Capacity

Introduction

3.1 This section assesses the quantitative and qualitative scope for new retail floorspace in the East Lindsey District up to 2028. The quantitative capacity analysis is assessed in terms of levels of spending for convenience and comparison shopping. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken as part of the town centre health check work in **Appendix 2**. The quantitative analysis adopts a study area covering the primary catchment areas of the three towns, as shown in Figure 3.1. The methodology is summarised in Figure 3.2 and set out in more detail in **Appendix 1**.

Figure 3.1: Study Area

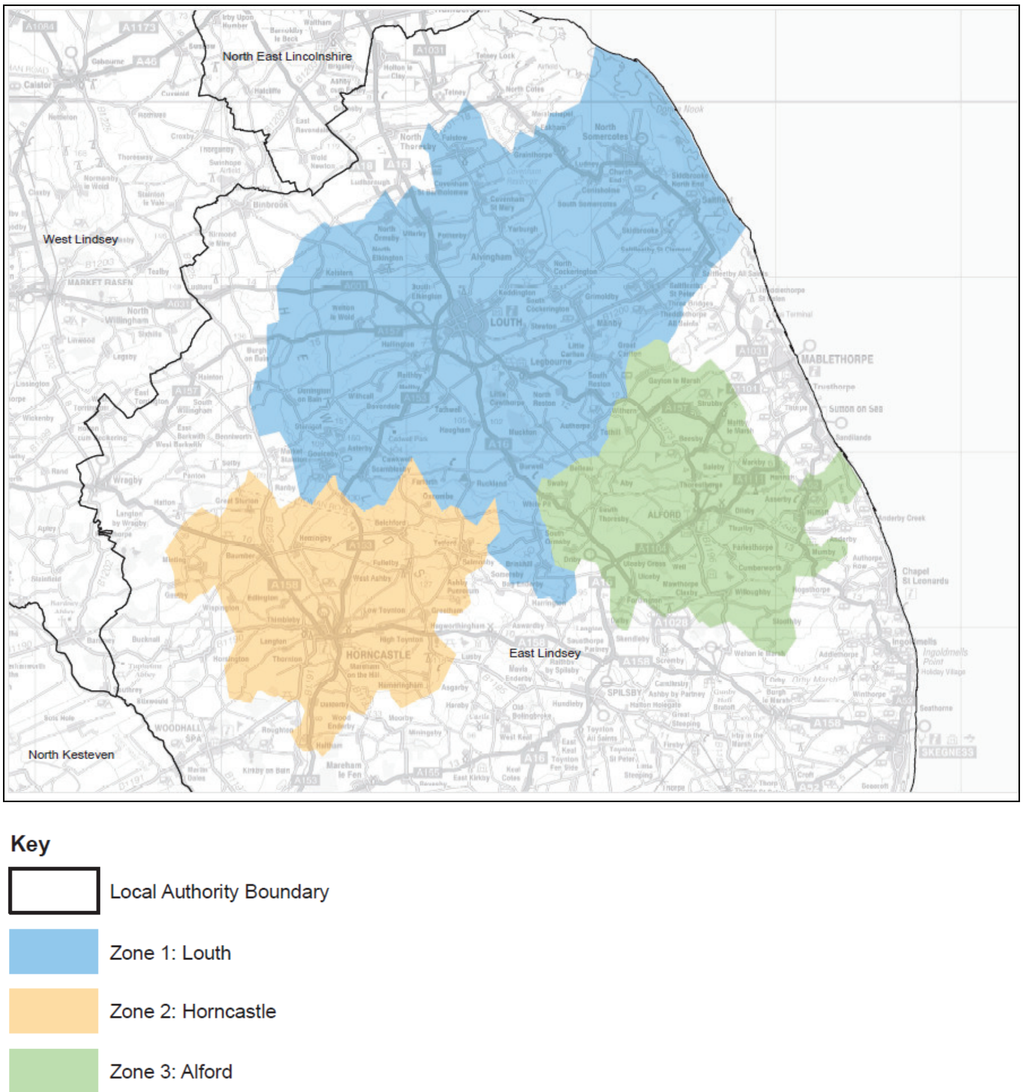
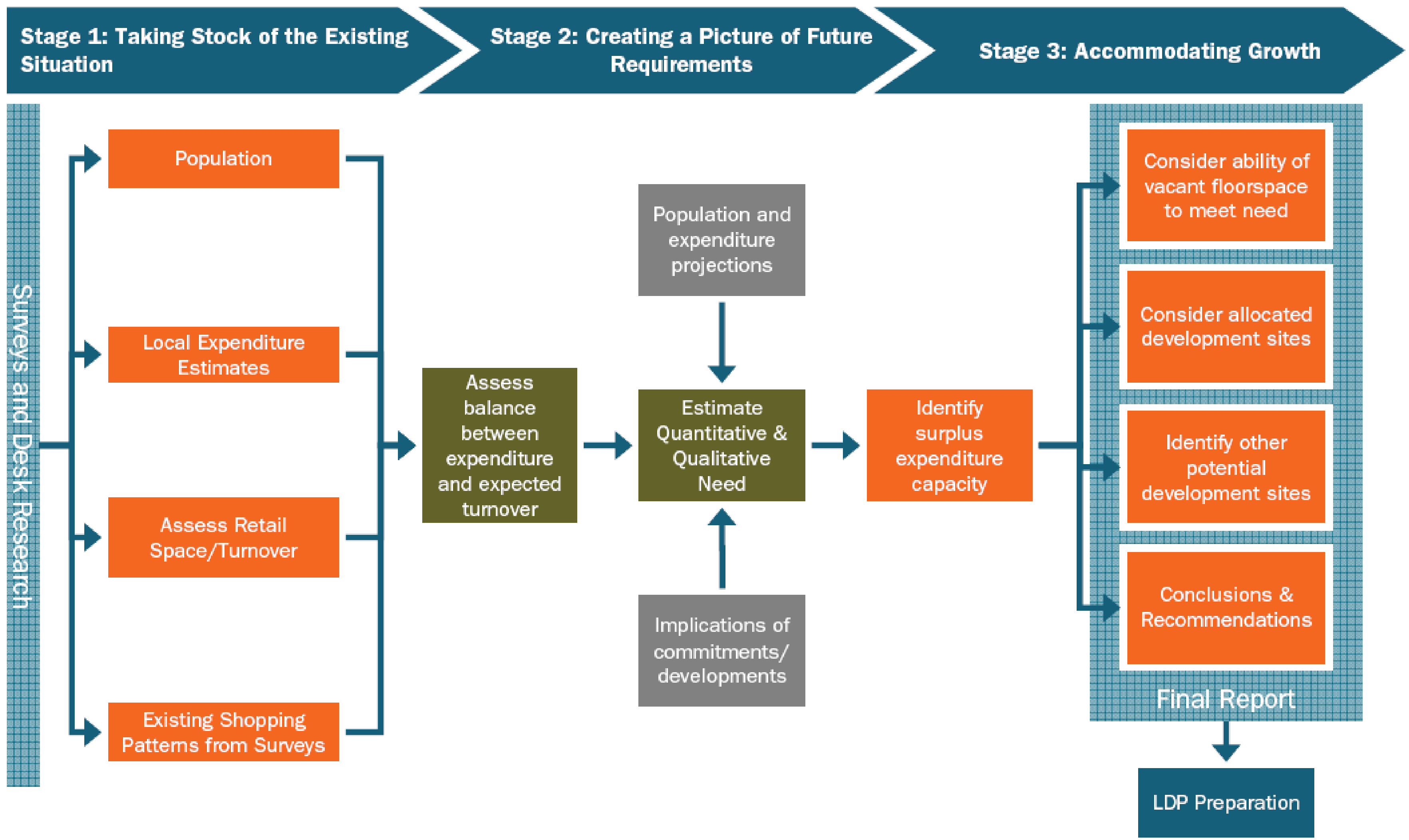


Figure 3.2: Methodology for Estimating Future Requirements for Retail Floorspace



The Economic Downturn

3.1 The economic downturn is still having a significant impact on the retail sector. A number of national operators have failed, leaving major voids within centres and retail parks (e.g. Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, Peacocks, La Senza, Past Times, Barratts and Habitat). Many town centre development schemes have been delayed and the demand for traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth.

3.2 Projecting expenditure levels within this study update takes into account the economic downturn, particularly in the short term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the LDF period. This study takes a long term view for the LDF period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency will also need to be carefully considered. We believe the study should take a balanced approach.

Retail Trends

Expenditure Growth

3.3 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However, the current economic downturn is expected to lead to limited growth in the short term.

3.4 In the past expenditure growth has fuelled the growth in retail floorspace, including major out-of-centre development particularly in the 1980s and 1990s. The economic downturn suggests that rates of growth during the past few years are unlikely to be achieved in the short term, but the underlying trend over the medium and long terms is expected to lead to a need for further retail floorspace. We anticipate these national trends will be mirrored in East Lindsey.

New Forms of Retailing

3.5 New forms of retailing have emerged in recent years as an alternative to more traditional shopping facilities. Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. Trends within this sector may well have implications for retailing within East Lindsey. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Growth in home shopping needs to be considered in East Lindsey District.

3.6 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure (Experian Briefing Note 9 (Sept 2011)). Recent trends suggest continued strong growth in this sector, from 5.1% of retail transactions in 2008 to 9.6%% in 2011 (Experian Briefing Note 9), but there is still uncertainty about its longer-term prospects and the potential effects on the high street. Experian's Retail Planning Note 9 states:

"Growth in internet shopping has exceeded our expectations. Online spending increased in real terms by 18% in 2010 in line with the forecast in Retail Planner 8 of August 2010. However, 2011 has seen expansion continue at this impressive pace, despite the squeeze on consumers, rather than easing as in our previous forecast. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales in the next few years, but we now expect that market share holds constant from 2018 (rather than 2016). Our assumption that after 2018 internet shopping grows in line with total retail sales reflects the maturing of the market as the number of computer-literate adults reaches saturation point."

3.7 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. For example, extended opening hours and Sunday trading increased significantly in the 1990s. Retailers also responded to stricter planning controls by changing their trading formats. In addition some major food operators have introduced smaller store formats capable of being accommodated within town centres, such as the Tesco Metro, Sainsbury Central/Local store and Marks and Spencer's Simply Foods formats. Food operators have also entered the local convenience store market, for example Tesco Express store and convenience stores linked with petrol filling stations. The entrance of European discount food operators such as Aldi, Lidl and Netto has also been rapid during the last decade.

3.8 Food store operators have also implemented a programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have attempted to increase the sale of non-food products within their food stores, including clothing and electrical goods.

3.9 Comparison retailers have also responded to recent market conditions. The bulky goods retail warehouse sector has rationalised and there have been a number of mergers. For example there are now fewer DIY operators and B&Q and Homebase have scaled down or closed their stores. This may be due to the current downturn in the housing market, which has been historically linked to the success of DIY store operators.

3.10 Other traditional high street retailers have sought out-of-centre stores, for example Boots and Poundstretcher. Matalan has also opened numerous discount clothing stores across the country. Sports clothing retail warehouses including JJB Sports and Decathlon have also expanded out-of-centre.

3.11 The economic downturn has had, and is likely to continue to have, an impact on the retail sector. The effects of the recession may continue to have an impact on shop vacancy levels in the District. The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods are particularly weak at present.

3.12 Within town centres, some high street multiple comparison retailers changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq m/2,150 sq ft) with an increasing polarisation of activity into the larger regional and sub-regional centres. The continuation of these trends will influence future operator requirements in East Lindsey with smaller vacant units becoming less attractive for new occupiers and existing retailers looking to relocate into larger units in higher order centres.

3.13 Operator demand for space has decreased during the recession, and of those national multiples looking for space many prefer to locate in larger centres i.e. Lincoln and Grimsby. Demand from comparison national multiples within the District's town centres is likely to be weaker, which will affect the appropriate strategies for individual centres.

Population and Expenditure

3.14 The study area population for 2001 to 2028 is set out in Table 1A in **Appendix 3**. Experian provides postcode area population estimates for each of the survey zones at 2001 based on Census data. These have been projected forward between 2001 and 2011 based on 2011 Census of population data. Future growth up to 2028 is based on Edge Analytics population projections for East Lindsey District (11.8% growth between 2011 and 2031). Population within the study area is expected to increase between 2012 and 2028 by 9.3%.

3.15 Table 2A in **Appendix 3** sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2028. Comparison forecasts of per capita spending are shown in Table 1B in **Appendix 4**.

3.16 The levels of available spending are derived by combining the population in Table 1A per capita spending figures in Tables 2A and 1B.

3.17 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 16.3% from £87.52 million in 2012 to £101.8 million in 2028, as shown in Table 3A. About 60% of this expenditure increase is attributable to population growth.

3.18 Comparison goods spending is forecast to more than double between 2012 and 2028, increasing from £109.92 million in 2012 to £230.72 million in 2028, as shown in Table 2B. About 84% of this expenditure increase is attributable to growth in expenditure per person rather than population growth.

Existing Retail Floorspace 2012

3.19 Existing convenience goods retail sales floorspace within the three centres within East Lindsey is 7,582 sq.m net as set out in Table 4A, **Appendix 3**. This floorspace figures excludes comparison sales floorspace within food stores/shops. The benchmark turnover of this floorspace is £57.85 million based on company average sales density figures, as shown in Table 4A.

3.20 Comparison goods retail floorspace within the three centres is estimated as 18,835 sq m net as shown in Table 3B, **Appendix 4**. The benchmark turnover of this floorspace is £66.85 million.

Existing Spending Patterns 2012

3.21 The results of the household shopper questionnaire survey undertaken by NEMS in March 2012 have been used to estimate existing shopping patterns within the study area. A summary of the methodology and results is shown in **Appendix 5**.

Convenience Shopping

3.22 The results of the household shopper survey have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone are shown in Table 5A, **Appendix 3**.

3.23 Table 5a indicates that the majority of expenditure from residents within Louth and Horncastle on convenience food and grocery shopping is spent within the study zone (72% and 79% respectively). Only around 30% of expenditure within Alford is spent in the Alford zone (zone 3). The majority of the remaining 70% expenditure leaks to Skegness, Mablethorpe and Louth.

3.24 The level of convenience goods expenditure attracted to shops/stores in Louth, Horncastle and Alford in 2012 is estimated to be £67.45 million as shown in Table 6A and 11A, **Appendix 3**. The total benchmark turnover of the existing convenience sales floorspace within the three centres, is £57.85 million at 2012 (Table 4A). These figures suggest that collectively convenience retail facilities across these three centres are trading 16.6% above the benchmark average. There is an expenditure surplus of £9.6 million in 2012 (see Table 11A).

3.25 The analysis of existing food and grocery shopping patterns suggests convenience facilities in Louth are trading on average 39.6% above benchmark, with the Morrison's and Heron stores trading particularly healthily. Convenience facilities in Horncastle are trading 21% below benchmark. In Alford convenience facilities are trading 33.7% above benchmark.

Comparison Shopping

3.26 The estimated comparison goods expenditure currently attracted by shopping facilities within the three main centres is £62.66 million in 2012, as shown in Tables 4B to 8B, **Appendix 4**. The centres' market share of total comparison goods expenditure generated within the study area is 51%. This reflects the influence of higher order centres within East Lindsey, and outside the district including Skegness, Grimsby and Lincoln.

3.27 The total benchmark turnover of the existing comparison sales floorspace within the three centres, is £66.85 million at 2012 (Table 3B). These figures suggest that collectively convenience retail facilities are trading just below the assumed benchmark average. Based on this expenditure estimate, the average sales density for existing comparison sales floorspace (18,835 sqm) is £3,327 per sq.m net, broken down in Table 3.1.

Table 3.1: Defined Centres Comparison Average Sales Densities

Centre	Average Sales Density 2012 £ per sq.m net
Louth	£3,547
Horncastle	£2,828
Alford	£2,436
Average	**£3,327**

3.28 Table 3.1 indicates that trading levels amongst comparison facilities in the three towns vary. The average sales density figures should be viewed in the context of the type of floorspace in each area. Comparison facilities in Louth are trading at the highest density, followed by Horncastle. This reflects the role played by Louth as the main comparison shopping destination in this part of the District, and the presence of national multiple retailers.

3.29 Alford is trading at a much lower density. This difference is due primarily the type of retail floorspace in this centre, with the centres within Alford predominantly containing a higher proportion of small independent shops, with much lower sales densities than national multiples.

3.30 Overall comparison shopping facilities within Louth and Horncastle demonstrate that these centres appear to be trading satisfactorily. Comparison shops in Alford appear to be trading below expected levels, in part due to the high proportion of second hand shops.

Quantitative Capacity for Convenience Floorspace

3.31 The level of available convenience goods expenditure in 2012, 2015, 2018, 2023 and 2028 is shown at Tables 6A to 10A, in **Appendix 3**. These tables are based on constant market shares, established through the household survey results (Table 5A).

3.32 The total level of convenience goods expenditure available for shops in the three towns between 2012 and 2028 is summarised in Table 11A. Convenience expenditure available to shopping facilities in the three towns is expected to increase from £67.45 million in 2012 to £78.46 million in 2028.

3.33 Table 11A subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further new development. Within the three towns there is £9.6 million of surplus convenience goods expenditure in 2012. Future expenditure growth will generate an expenditure surplus of +£13.13 million in 2018, increasing to +£16.86 million in 2023 and +£20.61 million in 2028.

3.34 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 11A. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density of £10,000 per sq m net, assuming surplus expenditure will be accommodated in large food stores.

3.35 Based on these assumptions, surplus expenditure at 2018 could support **1,313 sq m** net of sales floorspace (1,876 sq m gross) in the three towns as a whole, or **1,686 sq m** net by 2023 (2,408 sq m gross), as shown in Table 11A in **Appendix 3**. The projection to 2028 is **2,061 sq m** net (2,944 sq m gross).

3.36 The above capacity figures are based on constant market shares. There is potential for large food store development to increase the market share of these three towns, i.e. dependent on the level of expenditure leakage from the primary catchment area and the scope to improve food store provision in qualitative and quantitative term.

3.37 In Louth convenience expenditure leakage from the primary catchment area (zone 1) is about 28%. In addition the two main food stores (Morrison's and Co-op) are relatively small (around 1,400 sq m net) when compared with food superstores (usually at least 2,500 sq m net). In our view a modest reduction in expenditure leakage from 28% to 25% should be achievable.

3.38 In Horncastle convenience expenditure leakage from the primary catchment area (zone 2) is about 21%. The Tesco store is relatively small (around 1,000 sq m net). In our view a modest reduction in expenditure leakage from 21% to 15% could be achieved.

3.39 In Alford convenience expenditure leakage from the primary catchment area (zone 3) is significant at about 69%. The Co-op store is small (around 400 sq m net). In our view a significant reduction in expenditure leakage from 69% to 20% could be achieved if a large food store was developed.

3.40 The uplifted and adjusted market shares are shown in Table 12A and the revised retail floorspace projections are shown in Table 13A. Based on these assumptions, surplus expenditure at 2018 could support **2,318 sq m** net of sales floorspace (3,311 sq m gross) in the three towns as a whole, or **2,743 sq m** net by 2023 (3,918 sq m gross). The projection to 2028 is **3,170 sq m** net (4,529 sq m gross).

3.41 The floorspace figures suggest there is potential for large food stores in both Louth and Alford, but not in Horncastle even allowing for an uplift in market share.

Quantitative Capacity for Comparison Floorspace

3.42 The household survey suggests that the three town's retention of comparison goods expenditure is lower than for convenience goods. The lower level of comparison expenditure retention is due to the strength of competing towns, particularly Grimsby, Lincoln and Skegness.

3.43 Future improvements to comparison retail provision within the three towns could help to claw back some additional expenditure leakage from the study area. However, major developments in neighbouring authorities will limit the ability of shopping facilities in the three towns to increase their market share of comparison expenditure. Retail development will be necessary in the three towns in order to maintain existing market share in the future. An appropriate strategy for the three towns should be as a minimum to maintain existing 2012 market shares in the face of increasing future competition, whilst maintaining the vitality and viability of centres.

3.44 The baseline retail capacity projections in this report assume the three centres within East Lindsey can maintain their market share of comparison expenditure in the future. The potential to increase market shares has also been assessed.

3.45 Based on constant market shares, available comparison goods expenditure has been projected forward to 2016, 2021 and 2028 in Tables 5B to 7B in **Appendix 4**, and summarised in Table 8B. Available comparison expenditure is expected to increase from £62.66 million in 2012 to £131.51 million in 2028.

3.46 Future available expenditure is compared with the projected turnover of existing comparison retail facilities within the three towns in order to provide estimates of surplus expenditure, as shown in Table 8B. Table 8B assumes that the benchmark turnover of comparison floorspace will increase in real terms. A growth rate of 1.7% per annum is adopted, which is realistic if an expenditure growth rate of 4.45% per annum is achieved. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

3.47 Population and expenditure growth will result in a comparison goods expenditure surplus of £6.52 million in 2018, increasing to £22.42 million in 2023 and £43.97 million in 2028.

3.48 Surplus comparison expenditure has been converted into net comparison sales floorspace projections in Table 8B in **Appendix 4** using an average sales density of £4,000 per sq.m. Surplus expenditure at 2018 could support **1,474 sq m** net of sales floorspace (1,965 sq m gross), or **4,656 sq m net** (6,208 sq m gross) by 2023. The projection to 2028 is **8,395 sq m net** (11,193 sq m gross).

Qualitative Need for Retail Floorspace

Food and Grocery Shopping

3.49 The household survey results indicate that most residents in the study area undertake both a main and top-up shopping trips shopping trip. Main shopping trips are generally made once a week or less often and made more frequently and many households will also undertake bulk food shopping trips, particularly households who have access to a car for shopping. The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large supermarkets or superstores are the usual destination for these types of shopping trip.

3.50 There are only four food supermarkets of around 1,000 to 1,400 sq m net within the three towns, i.e. Morrison's and Co-op in Louth; Tesco and Co-op in Horncastle. In addition to these medium sized supermarkets, there are five small convenience stores (around 200 to 400 sq m net), i.e. Heron and Lincolnshire Co-op stores in Louth and Horncastle, and Co-op in Alford.

3.51 These stores attract a relatively low proportion of main and bulk food shopping trips and predominantly serve a top-up/basket food and grocery shopping function.

3.52 There is a reasonably high level of main food shopping trips made from Louth (zone 1) to larger food stores in Grimsby and Cleethorpes.

3.53 Within Horncastle (zone 2) there is a leakage of main food shopping trips to larger stores in Lincoln, but not the same level of leakage as in Louth. Within Alford (zone 3) there is significant leakage to larger stores in Skegness, Mablethorpe and Louth.

3.54 In qualitative terms the existing stores do not offer the full range and choice of products available in larger supermarkets and superstores, e.g. stores with a net sales area of 2,000 sq m net and above.

3.55 The constant market share retail capacity projections set out in Table 11A in Appendix 3 suggests most of the surplus convenience goods expenditure at 2018 relates to facilities in Louth (£15.26 million), followed by Alford (£1.52 million). The capacity projections show that in 2018 there a still a deficit of expenditure available to Horncastle (-£3.65 million). Most of the under-trading relates to the Tesco and Co-op stores, but there is no indication these stores are vulnerable to closure.

3.56 Respondents to the household survey were asked if they would like a new large food store in each of the three towns. In relation to Louth, 34.4% wanted a new store with a further 11.1% saying it would depend on where it was located or who the operator was. In total 49.9% indicated they did not want a store in Louth.

3.57 In relation to Horncastle, only 31.3% wanted a new store, with a further 4.7% saying it would depend on where it was located or who the operator was. In total 55.4% indicated they did not want a store in Horncastle.

3.58 In Alford, 45.6% wanted a new store, with a further 2.9% saying it would depend on where it was located or who the operator was. In total 44.8% indicated they did not want a store in Alford.

3.59 The survey results for each town indicates there are mixed views in terms of new food store provision.

3.60 The capacity figures, level of expenditure leakage and the qualitative analysis of existing provision assessment suggest that the priority for future food store development should be within Louth and Alford.

Comparison Shopping

3.61 Louth is the main comparison shopping destination in this part of East Lindsey. It is the highest ranking centre within East Lindsey, after Skegness. However, Louth is ranked below other larger centres surrounding East Lindsey, i.e. Lincoln and Grimsby. These centres will continue to attract shopping trips from East Lindsey, because they have a much more extensive range and choice of retailers.

3.62 Louth has a good range of comparison shops (119 shops) including national multiples (49) and independent specialists. The proportion of comparison goods shop unit within the centre is slightly above the national average. In Horncastle, there is a more limited choice of comparison shops (61 shops) and a limited number of national multiples (17) within the centre. Alford is a much smaller centre and has a much more limited range of comparison shops (27) and only five multiple retailers.

3.63 There is limited provision of retail warehouses selling bulky goods within East Lindsey. The B&Q store in Louth is the main operator. There may be qualitative scope to improve bulky goods provision.

3.64 Any out-of-centre retail warehouse proposal would need to be considered on its individual merits. The applicant would need to clearly demonstrate that the nature of retail floorspace proposed cannot be adequately accommodated within existing town centres, allowing for flexibility, and that the development would not harm designated centres.

3.65 In commercial terms Louth has the best prospects for attracting new multiple retailers to East Lindsey. Horncastle and Alford are likely to remain lower order centres, but will some potential to increase the range and quality of comparison shopping if they can maintain or modestly improve their market share of expenditure.

Non-Retail Services

3.66 The retail floorspace projections relate to Class A1 retail uses and exclude Class A2 and A3 uses.

3.67 National information available from Goad Plans indicates that the proportion of Class A1 non-retail and A2 uses within town centres across the country represent 20% of all shop units (Experian GOAD). In the three town centres, 25% of all shop units are occupied by Class A1 non-retail services and Class A2 uses, slightly higher than the Goad national average.

3.68 For Class A3/A5 uses, the Goad national average is nearly 16% of all units. In the three town centres in East Lindsey, just over 12% of all units are in A3/A5 use, slightly lower than the national average.

3.69 Despite the reasonable existing provision, it is appropriate to assume that retail developments within centres will include an element of non-retail services). It may be reasonable to assume 20% of new town centre floorspace will be occupied by non-retail services.

4.0 Food Store Economic Impact Assessment

Introduction

4.1 The theoretical expenditure capacity to support food store development in Louth and Alford has been identified in previous sections of this report. This section explores the economic implications of developing new food stores.

4.2 Based on the retail capacity figures, we have assumed a food store of 2,000 sq m net convenience sales could be developed in Louth and a store of 1,000 sq m net in Alford. The cumulative impact of these two stores has been considered. Food superstores are defined as having at least 2,500 sq m net. Allowing for comparison sales floorspace, a store with 2,000 sq m net of convenience goods sales in Louth should function as a superstore. In smaller market towns such as Alford, the catchment population is not capable of supporting a superstore, and food retailers tend to operate supermarkets usually between 1,000 to 2,000 sq m net.

4.3 The retail capacity analysis does not identify scope for a new food store in Horncastle. Nevertheless, the economic impact of a new food store of 1,500 sq m net convenience sales has been considered.

4.4 Government guidance contained within the recently published NPPF indicates proposals should only be refused where there is likely to be significant adverse impacts which outweigh the benefits of the proposal, or the proposal fails the sequential approach. NPPF states that planning applications for town centre uses should be assessed against:

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

b the impact of the proposal on the town centre vitality and viability, including local consumer choice and trade in the town centre and wider area.

4.5 If a proposal is likely to lead to a significant adverse impact it should be refused.

Trade Diversion and Impact

4.6 Building on the retail capacity analysis in Appendix 3, an economic impact analysis undertaken for potential new stores in the three towns. This assessment examines trading patterns in the base year 2012 and assumes a 2018 design, based on new store being completed by 2016 and allowing two years to achieve settled trading patterns.

Base Year 2012 Shopping Patterns

4.7 Table 6A in **Appendix 3** set out existing 2012 convenience trading pattern based on the market shares shown in Tables 5A.

4.8 The turnover of convenience facilities in the three towns is estimated to be £67.45 million, as summarised in Table 11A. The combined convenience turnover for Louth is £45.4 million; £17.06 million for Horncastle and £5.0 million for Alford.

Future Trading Patterns in 2018 – Assuming No Development

4.9 The future turnover of existing convenience shopping facilities at 2018 is shown in Table 8A, and summarised in Table 11A in **Appendix 3**. In total the amount of convenience expenditure attracted to the three towns is expected to increase from £67.45 million to £70.98 million between 2012 and 2018. These figures are a baseline for assessing impact and assume no new retail floorspace will be implemented by 2018, and that shopping patterns remain unchanged.

Future Trading Patterns in 2018 – With Louth and Alford stores

4.10 The expected convenience turnover and trade draw of a 2,000 sq m net food store in Louth is shown in Table 1C in **Appendix 8**. The store has an expected convenience turnover of approximately £20 million, based on company average sales density of £10,000 per sq m net.

4.11 The expected convenience turnover and trade draw of a 1,000 sq m net food store in Alford is shown in Table 2C. The store has an expected convenience turnover of £10 million.

4.12 The revised shopping patterns in 2018 with new food stores of this size in both Louth and Alford included are shown in Table 3C in **Appendix 8**. The cumulative trade diversion and impact results are summarised in Table 4C.

4.13 The two food stores are expected to reduce the convenience goods turnover of existing convenience goods facilities in Louth from £47.78 million to £34.59 million, a cumulative impact of about -27.6%.

4.14 The two food stores are expected to reduce the convenience goods turnover of existing convenience goods facilities in Alford from £5.26 million to £4.16 million, a cumulative impact of about -21%.

4.15 Impact on Horncastle’s convenience goods facilities is around -7.7%.

Implications for Louth Town Centre

4.16 In Louth the highest level of trade diversion is expected to come from the Morrison’s and Co-op stores in the town centre (-£8.54 million and -£3.32 million respectively, this represents a cumulative impact of -34.9% and -26.9% respectively. Impact on the smaller Heron and Lincolnshire Co-op stores in

Louth is -20.4% and -17.7%. Average impact on small convenience shops in the town centre is estimated to be -8.9%.

4.17 The residual turnover of convenience stores/shops in Louth (£34.58 million) is still 6.3% above the benchmark turnover (£32.52 million).

4.18 Convenience goods trade diversion from the town centre totals -£12.9 million. The implications of this trade diversion need to be carefully considered.

4.19 The impact figures suggest the Morrison and Co-op stores will experience a significant reduction in trade, but both stores will continue to trade around the company average. There is no evidence to suggest either store would be forced to close.

4.20 The 8.9% reduction in trade amongst small convenience shops in the town centre could result in some shop closures, perhaps 2-3 convenience shops. Nevertheless, a just over half of the loss in trade (£0.38 million out of £0.66 million) will be offset by growth in expenditure between 2012 and 2018, and existing shopping patterns suggest convenience shops in Louth are trading relatively healthily.

4.21 The impact on convenience goods shopping facilities in Louth town centre is likely to be around 28%. This impact relates to direct trade diversion to the new food stores. It does not take into account any indirect impact through the reduction or increase in linked shopping trips made to Louth town centre.

4.22 This reduction in trade may have knock on effects for Louth town centre as a whole.

4.23 The household survey results indicate that about 30% of respondents linked their last main food and grocery shopping trips with other non-food shopping. This figure underlines the importance of food shopping in attracting non-food shopping customers to the town centres.

4.24 A 28% reduction in convenience trade in the town centre could lead to a reduction in non-food shopping customers in the town centre. Total trade diversion of £12.9 million could represent about 258,000 trips per annum assuming a £50 average per trips. If as a minimum a third of these trips were linked trips then Louth town centre could lose about 86,000 linked trips.

4.25 However the proposed new store should also generate linked trips depending on how well connected it is to the town centre. A new store within the town centre should generate a similar proportion of linked trips to the town centre when compared with existing food stores, and in this represent a new food store in the town centre is likely to benefit rather than harm non-food shops and services within the town centre.

4.26 A new food store in Louth is expected to increase the overall amount of convenience goods trade within the town by 12% (£47.78 million to £53.6 million. The proposed store's turnover is £19.01 million, generating about

380,000 trips. In order to offset all lost linked trips to the town centre (86,000 trips) the new store would need to generate about 23% linked trips. This level of linked trips should be achieved by an in-centre or edge of centre food store.

4.27 Provided the new store is well connected to the town centre the net effects in terms of linked trips and spin-off trade for non-food shops should be positive for the town centre.

Implications for Alford Town Centre

4.28 In Alford trade diversion from the edge of centre Co-op store is -£0.85 million, a cumulative impact of -29.6%. Average impact on small convenience shops in the town centre is estimated to be -10.6%. The overall impact on facilities in Alford is -21%. The residual turnover of convenience stores/shops in Alford (£4.16 million) is still 11% above the benchmark turnover (£3.74 million).

4.29 The Co-op store will experience a significant reduction in trade, and will trade about 16% below the company average. Some stores trade above average and others trade below. A food store trading 16% below the company is within the normal range we would anticipate, and an impact of 29.6% in Alford does not necessarily indicate this store will be forced to close. Nevertheless there is some risk the store would close.

4.30 The 10.6% reduction in trade amongst small convenience shops in the town centre could result in some shop closures, perhaps 1-2 convenience shops. Again, a significant element of the loss in trade will be offset by growth in expenditure between 2012 and 2018.

4.31 A 21% reduction in convenience trade in the town centre could lead to a reduction in non-food shopping customers in the town centre. Total trade diversion of £1.10 million could represent about 37,000 trips per annum assuming a £30 average per trip. If, as a minimum a third of these trips were linked trips then Alford town centre could lose about 12,000 linked trips.

4.32 A new food store in Alford is expected to significantly increase the overall amount of convenience goods trade within the town from £5.26 million to £14.16 million. The proposed store’s turnover is £10 million, generating about 200,000 trips (assuming an average of £50 per trip), from Alford town and its rural catchment area. In order to offset all lost linked trips to the town centre (12,000 trips) the new store would need to generate about 6% linked trips. This level of linked trips should be achieved by a new store in Alford.

4.33 If the new store is well connected to the town centre then the net effects in terms of linked trips and spin-off trade for non-food shops are likely to be positive for the town centre, regardless of whether the Co-op store is forced to close.

Future Trading Patterns in 2018 – With a Horncastle store

4.34 The expected convenience turnover and trade draw of a 1,500 sq m net food store in Horncastle is shown in Table 5C in **Appendix 8**. The store has an expected convenience turnover of £15 million, based on company average sales density of £10,000 per sq m net. The trade diversion and impact results are summarised in Table 6C.

4.35 The new food store is expected to reduce the convenience goods turnover of existing convenience goods facilities in Horncastle from £17.95 million to £9.69 million, an impact of 46%.

4.36 The highest level of trade diversion is expected to come from the Tesco store (-£5.65 million) an impact of -57.8%. Impact on the Co-op store is -39.3% and impact on the smaller Heron and Lincolnshire Co-op stores is -39.7% and -26.5% respectively. Average impact on small convenience shops in the town centre is estimated to be -9.6%. The overall impact on convenience facilities in the town centre is -46%.

4.37 The residual turnover of convenience stores/shops in Horncastle (£9.69 million) is about 55% below the benchmark turnover (£21.60 million). These figures suggest food store closures are likely.

4.38 The level of convenience trade diversion from the town centre is likely to have a significant adverse impact on the town centre as a whole.

5.0 Potential Food Store Development Sites

Introduction

5.1 A review of potential development sites has been undertaken within the three towns, based on discussions with officers at East Lindsey Council and the Project Reference Group, as set out in **Appendix 7**.

5.2 All identified sites have been evaluated, in terms of their feasibility and assessed against the following factors:

- existing land uses and availability, categorised as follows:
  - short term – completed by 2016;
  - medium term – completed between 2016 and 2021;
  - long term – likely to be completed after 2021;
- connectivity to the primary shopping area (sequential approach);
- commercial potential for large food store development, categorised as follows:
  - prime site – likely to attract a developer and retail occupiers;
  - secondary site – which may generate limited demand.
- potential scope to accommodate additional retail floorspace, categorised as follows:
  - small scale - under 2,000 sq m gross floorspace;
  - medium scale – 2,000 to 5,000 sq m gross floorspace;
  - large scale - over 5,000 sq m gross floorspace;
- landownership; and
- potential development constraints.

5.3 The overall development prospects of each opportunity, taking on board all of the factors listed above, has been categorised as follows:

- **Good** - development sites that have good prospects for accommodating a food store, and could be considered for completion in the short term;
- **Reasonable** - development sites which are well located to provide a food store, although obstacles to development will need to be overcome, for example implementation may only be achieved in the medium term or the development is in a sequentially inferior location; and

- **Poor** - development sites that may be unattractive or unsuitable for food store development, where their delivery is very uncertain.

5.4 This overall rating is based on an initial evaluation for each site and discussions with the key landowners. The evaluations undertaken for each opportunity do not imply that planning permission should be granted or refused for development on any site. The evaluation identifies potentially suitable development opportunities that are worthy of further consideration by the Council.

Site Assessment

5.5 Possible opportunities for development of large food stores were identified within the three towns as follows:

Louth

- SITE L1: Louth Cattle Market, Upgate/Newmarket
- SITE L2: ELDC Car Park and Co-op, Kiln Lane
- SITE L3: Queen Street Car Park
- SITE L4: Morrison's Supermarket, Eastgate/Monks Dyke Road
- SITE L5: The Malt Kiln, Newbridge Hill
- SITE L6: The Woodman Pub and Car Parks, Eastgate
- SITE L7: Gemini House, Chequergate

Horncastle

- SITE H1: Tesco Superstore, Water Mill Road
- SITE H2: JT Friskney Site, West Street
- SITE H3: Former Cattle Market, The Wong

Alford

- SITE A1: Alford Coal Supplies Ltd, Church Street
- SITE A2: Easton and Son Dairy, South Street,
- SITE A3: The White Horse Hotel, West Street, Alford

5.6 Individual site assessments are set out in Appendix 7.

Louth

5.7 In Louth, the economic impact analysis suggests a food store with convenience goods sales floorspace of around 2,000 sq m net should not have a significant adverse impact on the town centre, if it is well connected to the town centre and primary shopping area.

5.8 The Louth Cattle Market site (Site L1) provides the best prospects for providing a wholly new food store of 2,000 sq m net convenience sales relatively well connected to the town centre, and would accommodate projected growth up to and beyond 2023.

5.9 The ELDC Car Park and Co-op site (Site L3) has been discounted due to site constraints and access.

5.10 The extant planning permission on the Queen Street Car Park (Site L3) would only provide a small store of around 1,000 sq m net, and would not significantly improve main and bulky food shopping in Louth in qualitative terms, or meet the entire quantitative capacity for additional sales floorspace.

5.11 The Morrison's store and adjacent land provides an opportunity to provide an enlarged food store, which if implemented is likely to increase the net convenience sales floorspace from 1,210 sq m net to around 2,500 sq m net, and increase of about 1,300 sq m net. This form of development would significantly improve main and bulky food shopping in Louth in qualitative terms. If implemented with the Queen Street smaller food store commitment then it would accommodate projected growth for the foreseeable future.

5.12 There appears to be two main development options in Louth i.e. a new large food store of around 2,000 sq m net convenience floorspace on the Cattlemarket site, or an enlarged Morrison store with a smaller store at Queens Street Car Park.

Horncastle

5.13 In Horncastle, the economic impact analysis suggests a food store of around 1,500 sq m net would result in food store closures in the town centre and would have a significant adverse impact on the town centre.

5.14 The Tesco store and adjacent land provides an opportunity to create an enlarged food store, which if implemented is likely to increase the net convenience sales floorspace from 1,037 sq m net to at least 2,000 sq m net, and increase of about 1,000 sq m net. This sale of development would exceed the quantitative capacity for convenience sales floorspace in Horncastle for the foreseeable future. The impact of any extension proposal would need to be carefully considered.

Alford

5.15 In Alford, the economic impact analysis suggests a food store with around 1,000 sq m net of convenience goods sales should not have a significant adverse impact on the town centre particularly if it is well connected to the town centre and primary shopping area.

5.16 The Alford Coal Supplies (Site A1) and the White Horse Hotel and environs (Site A3) provide the only prospects for a new food store of 1,000 sq m net convenience sales. Based on the capacity figures, this size of store is considered to be the most likely to be commercially viable for a main food store operator in Alford.

5.17 The availability/deliverability of these two sites needs to be considered and discussed in more detail with the landowners if the Council chooses to promote the development of a large food store in Alford.

6.0 Conclusions and Recommendations

Introduction

6.1 This report provides an assessment of the need for retail development in Louth, Horncastle and Alford. It provides a guide to the shopping needs of the three towns up to 2018, 2023 and 2028. The principal conclusions of the analysis contained within this study are summarised below.

Meeting Shopping Needs

6.2 In order to meet projected growth in expenditure, there is a need for additional shopping and service facilities. Future planning policy and site allocations should seek to identify opportunities to accommodate growth.

Floorspace Projections

6.3 The floorspace projections set out in the previous sections assume that new shopping facilities within East Lindsey can maintain their current market share of expenditure. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- the re-occupation of vacant retail floorspace;
- the availability of land to accommodate new development;
- the reliability of long term expenditure projections, particularly after 2018;
- the effect of internet/home shopping on the demand for retail property;
- the level of retail operator demand for floorspace in East Lindsey;
- the likelihood that East Lindsey's existing market share of expenditure will change in the future in the face of increasing competition;
- the potential impact new development may have on existing centres.

6.4 Projections up to 2018 are realistic and are based on up to date forecasts, which take into account the effects of the recession. The long term floorspace projections (up to 2023 and beyond) shown in Section 3.0 should be treated with caution and should only be used as a broad guide. Long term projections should be monitored and kept under-review.

6.5 The expenditure projections in this study take into account home shopping and internet sales.

6.6 The scope for new retail development within the three towns in East Lindsey is set out below.

Convenience Goods Floorspace (Food and Grocery)

6.7 Using the uplifted market shares, the need for new convenience goods floorspace in each town at 2018 is:

- Louth - 1,520 sq m net (2,171 sq m gross);
- Horncastle - No requirement;
- Alford - 1,042 sq m net (1,488 sq m gross);
- **Total - 2,562 sq m net (3,659 sq m gross).**

Comparison Goods Floorspace (Non-Food)

6.8 In terms of comparison goods the need for new floorspace in each town at 2018 is:

- Louth - 1,279 sq m net (1,705 sq m gross);
- Horncastle - 255 sq m net (340 sq m gross);
- Alford - No requirement;
- **Total - 1,534 sq m net (2,045 sq m gross).**

Non-Retail Services (Class A2 to A5)

6.9 These above projections relate to Class A1 convenience and comparison retail uses only. There may be scope for a further 20% floorspace that can be occupied by non-retails services such as banks, hairdressers, travel agents, cafés and takeaways (Use Classes A2 to A5 uses and Class A1 non-retail services). About 1,100 sq m gross could be provided by 2018. On this basis the overall projection (Class A1 to A5) for 2018 would be around **6,800 sq m** gross.

Accommodating Future Growth

6.10 Planning policy suggests town centres should be the first choice for retail development, followed by edge of centre sites that are well connected to the town centre.

6.11 Existing shops will have a role to play in accommodating growth, after the recession. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase trade in real terms and the floorspace projections reflect this assumption. In addition to the growth in sales, vacant shops could help to accommodate future growth.

6.12 There were 36 vacant shop units within the three town centres, which equates to an overall vacancy rate of 7.5%, which is below the national average (12.9%). The vacancy rate is highest in Alford (14.3%) and lowest in Horncastle (5.5%). The total amount of vacant floorspace is not more than 4,500 sq m gross across the three town centres.

6.13 Vacant premises should help to accommodate future growth. As a maximum target the current vacancy level could fall from 7.5% to 5% then the number of reoccupied units would be about 12 units, which could accommodate about

1,400 sq m gross of Class A1 to A5 floorspace. Based on existing vacancy levels, this potential re-occupied space could be distributed as follows:

- **Louth**: 600 sq m gross;
- **Horncastle**: 100 sq m gross;
- **Alford**: 700 sq m gross;

6.14 If this reduction in vacant units can be achieved then the overall retail floorspace projection up to 2018 would reduce from around 6,800 sq m gross to around 5,400 sq m gross.

6.15 The short term priority during the recession should be the reoccupation of vacant floorspace, but this should not prevent investment within the three town centres.

Food Store Development

6.16 On the basis of the assumption that existing convenience retailers and commitments trade at national average levels, the capacity analysis indicates there is a requirement for additional food and grocery floorspace within Louth and Alford.

6.17 The economic impact assessment suggests food stores of around 2,000 sq m net and 1,000 sq m net convenience goods sales respectively in Louth and Alford could be commercially viable without having an adverse impact on town centres. These stores will need to be well connected to the town centres to minimise impact and maximise the benefits for the town centres.

6.18 There are two main development options in Louth i.e. a new large food store of around 2,000 sq m net convenience floorspace on the Cattlemarket site, or an enlarged Morrison store with a smaller store at Queens Street Car Park.

6.19 The Alford Coal Supplies (Site A1) and the White Horse Hotel and environs (Site A3) provide the only prospects for providing a new food store of around 1,000 sq m net convenience sales in Alford. The availability/deliverability of these two sites needs to be considered and discussed with landowners, if the Council chooses to promote a large food store in Alford.

East Lindsey Retail and Economic Assessment

Appendices

East Lindsey District Council

20 November 2012

50159

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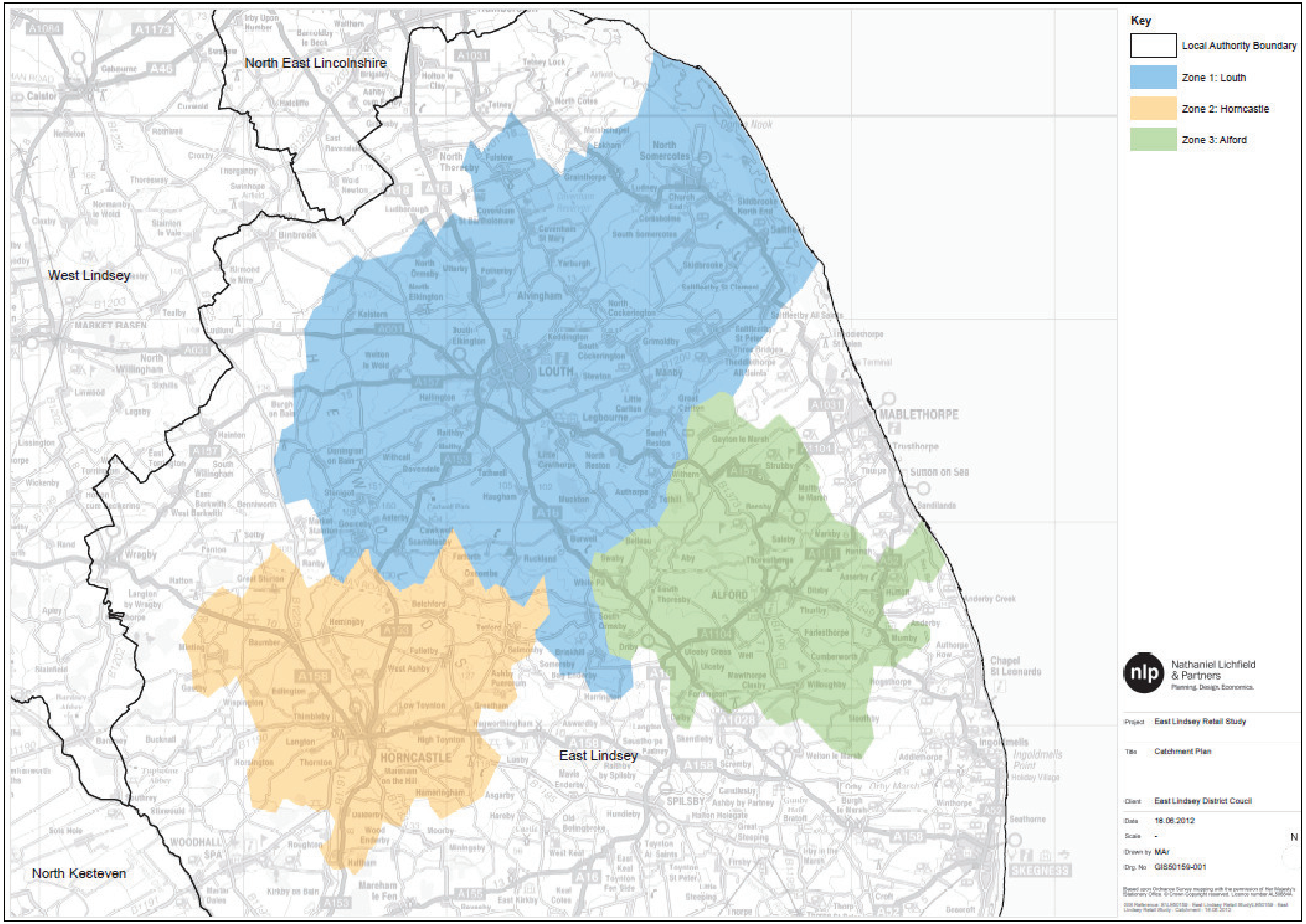
Appendix 1 Study Area and Methodology

East Lindsey Retail Study Area Zones

	Area	Postcode Sectors	No. Household Surveys
1	Louth	LN11 0; LN11 7; LN11 8; LN11 9	290
2	Horncastle	LN 9 5; LN 9 6;	110
3	Alford	LN13 0; LN13 9	100

STUDY AREA ZONES



Retail Capacity Assessment – Methodology and Data

Price Base

All monetary values expressed in this study are at 2010 prices, consistent with Experian's base year expenditure figures for 2010 (Retail Planner Briefing Note 9), which is the most up to date information available.

Study Area

The study area is based on postcode area boundaries. The extent of the study area is based on the study area adopted in the East Lindsey Retail Study (2006), which takes into consideration the extent of the catchment areas of the Area and District Retail Centres within East Lindsey and the proximity of competing shopping destinations.

Retail Expenditure

The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2010 have been obtained.

Experian's EBS national expenditure information has been used to forecast expenditure within the study area in the short term (2010 to 2013). Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

For longer term projections Experian provide forecast growth rates and trend line projections. Experian's average annual growth long term forecast is 0.5% for convenience goods and 3% for comparison goods. The ultra long term trend line annual growth rates are 0.6% for convenience goods and 5.9% for comparison goods.

We believe the Experian's lower EBS growth forecast rates for 2011 to 2013 reflect the current economic circumstances and provide an appropriate growth rate for the short term. In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth forecasts (0.5% and 3%) are relatively cautious based on past growth rates. The ultra long trend line projection for comparison goods (5.9%) is relatively optimistic. We believe long term growth (after 2013) is likely to fall within this range and therefore we adopt the mid-point growth rate between Experian's lower growth forecast and the higher trend line projections. The mid-point annual growth rates adopted after 2013 are 0.55% for convenience goods and 4.45% for comparison goods. In our view these mid-point growth rates provide the most appropriate average growth rate following the economic recovery. These growth figures relate to real growth and exclude inflation.

Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops eg. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing.

This Experian information suggests that non-store retail sales in 2010 was:

- 7.4% of convenience goods expenditure; and
- 11.7% of comparison goods expenditure.

Experian predicts that these figures will increase in the future.

Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace.

The adjusted figures suggest that SFT sales in 2010 are:

- 3.7% of convenience goods expenditure; and
- 8.8% of comparison goods expenditure.

The projections provided by Experian suggest that these percentages could increase to 5.9% and 12.7% by 2016.

Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the Internet. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector, but Experian's projections suggest this growth will level off by 2016/17. Experian's September 2011 figures suggest that the growth in e-tailing has to a certain extent been at the expense of other forms of home shopping such as catalogue and mail order shopping.

The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises eg. food store operators. Therefore, growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

Market Shares/Penetration Rates

To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the 2011 household survey.

The total turnover of shops within East Lindsey is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Verdict (UK Food and Grocery retailers 2010) and Mintel (Retail Rankings 2010) information, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Benchmark Turnover Levels

Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores listed in Table 1A, Appendix 2, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

The estimated convenience goods sales areas have been derived from a combination of the Council's floorspace surveys, Institute of Grocery Distribution (IGD) and NLP estimates based on site visits. Estimates for comparison sales floorspace within large food stores has been deducted from the figures for consistency with the use of goods based expenditure figures.

Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each town in East Lindsey and our experience of trading levels of small independent shops informed by household shopper surveys elsewhere, we have adopted an average sales density of £4,000 per sq.m has been adopted for small convenience shops in the study area, consistent with NLP's experience of retail studies across the country. The total benchmark turnover of existing convenience sales floorspace within East Lindsey is £57.85 million at 2012.

Mintel's Retail Rankings provides company average sales density information for a selection of national comparison retailers. This data suggests a notional average sales density for national high street comparison retailers of around £5,000 per sq.m. The average for bulky good retail warehouses is generally lower than this average. Based on our recent experience across the country average sales densities for comparison floorspace can range from £2,000 to £8,000 per sq.m net. The higher end of this range is usually only achieved by successful shopping centres, which reflects the higher proportion of quality multiple retailers.

For comparison shops in Louth town centre we have adopted an average sales density £4,000 per sq.m net, compared with £3,000 per sq.m net in Horncastle and Alford.

Appendix 2 Centre Health Checks

A. Louth

Louth is, with Skegness, one of the main shopping centres within East Lindsey, and is identified as a town centre of strategic importance. It functions above the smaller market towns of Horncastle, Alford and Mablethorpe. Louth fulfils an important role as a market town supporting a wide ranging community in terms of employment, shopping, education, recreation, health and community services.

It is located to the north of Horncastle and Alford, and serves the catchment to the north of the District. The nearest major centres to Louth include Grimsby 24km to the north, Skegness approx 27km south east and Lincoln 40km to the west. Given the lack of other settlements of similar size or status nearby, Louth's catchment area is relatively extensive and overlaps with the catchment areas of Skegness, and the sub-regional centres of Lincoln and Grimsby which influence shopping patterns within the District.

The centre has a variety of retail and service uses. Retail uses (Class A1 to A3) occupy 21,190 sq.m of gross floorspace (source: GOAD). The key roles of Louth include:

- **Convenience shopping**: A Co-op store located within the town centre (to the north/off Northgate) provides the main foodstore within primary shopping streets. This is supported by a Spar convenience store, as well as a good range of smaller units including butchers, fishmongers, bakers, delicatessens, greengrocers and newsagents. Morrison's supermarket provides a larger supermarket destination on the edge of the town centre to the east. The centre has a permanent indoor market and open air markets operate on Tuesdays, Fridays and Saturdays. Louth is developing a reputation for high quality, independent food shopping, particularly those independent food shops located along Eastgate.
- **Comparison shopping**: Louth offers a good range of comparison shopping, with a significant number of quality independent retailers commensurate with its role and function as a market town. The main higher order retail provision is located along Eastgate, Mercer Row and Market Place which accommodates retailers including New Look, Greenwoods, Superdrug, WH Smith, Boots, Peacocks and Boyes.
- **Services**: Louth provides a range of services including a post office, high street banks cafés, restaurants, takeaways, hairdressers, travel agents and beauty parlours. Takeaways in particular were concentrated along secondary retail streets, notably Aswell Street.
- **Entertainment**: Entertainment in Louth includes the Playhouse Cinema, art galleries and several pubs and bars;
- **Community facilities**: Louth provides a range of community services including a library, health centres and dentists, community centres, places of worship, tourist information and a number of advice centres.

Mix of Uses and Occupier Representation

Louth has a total of 287 retail/service uses (Class A uses). The diversity of uses present in Louth in terms of the number of units is set out in Table 2.1, compared against the national average.

Table 2.1 Louth Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		Louth %	National Average [1]
Comparison Retail	119	43.1	41.9
Convenience Retail	32	11.6	9.2
A1 Services [2]	37	13.4	11.1
A2 Services	32	11.6	9.2
A3/A5 (eating out)	38	13.8	15.7
Vacant	18	6.5	12.9
Total	**276**	**100.0**	**100.0**
A4 Pubs/Bars [3]	11	n/a	n/a

Source: Goad and NLP February 2012
(1) UK average for all town centres surveyed by Goad Plans (May 2011)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(3) Goad Plans average excludes Class A4 pubs and bars

As can be seen from Table 2.1, Louth has a slightly higher proportion of both comparison and convenience retail units than the national average. The centre has a higher proportion of A1 and A2 services but a lower proportion of A3/A5 units. The proportion of vacant units are significantly below the national average as an indication of the high demand for retail units.

Retailer Representation

Louth has a good selection of comparison shops (119 units), reflecting its importance within the retail hierarchy. Table 2.2 provides a breakdown of comparison shop units by category.

Louth provides a good range of comparison shopping, with all of the comparison categories are represented in the centre. The centre has a slightly lower proportion of clothing and footwear shops than the national average, with this trend also apparent for the categories of music and photography, as well as florists and jewellers. The centre has a lower proportion of booksellers, arts, crafts and stationers, chemists and those ‘bulky goods’ including DIY retailers and cars. The centre does, however, demonstrate a higher than average proportion of furniture, carpets and textiles shops, variety stores and ‘hobby’. The centre also has a noticeably higher proportion of ‘fancy goods’ and antiques shops which reflects the many gift shops and antiques dealers present in the centre.

Table 2.2: Louth Breakdown of Comparison Units

Type of Unit	Louth		% UK* Average
	Units	%	
Clothing and footwear	27	22.7	26.9
Furniture, carpets and textiles	14	11.8	8.7
Booksellers, arts, crafts and stationers	4	3.4	9.7
Electrical, gas, music and photography	9	7.6	9.6
DIY, hardware and homewares	3	2.5	5.9
China, glass, gifts and fancy goods	14	11.8	3.9
Cars, motorcycles and motor access.	1	0.8	3.1
Chemists, drug stores and opticians	7	5.9	9.3
Variety, department and catalogue	6	5.0	1.5
Florists, nurserymen and seedsmen	2	1.7	2.4
Toys, hobby, cycle and sport	8	6.7	5.3
Jewellers	5	4.2	4.9
Antique shops	2	)	)
Charity shops	10	) 15.9	) 8.8
Other comparison retailers	7	)	)
Total	**119**	**100.0**	**100.0**

Source: Goad and NLP February 2012
** UK average for all town centres surveyed by Goad Plans (May 2011)*

Service Uses

Louth has a good range of service uses, with all categories represented (see Table 2.3). The representation of categories is generally similar to the national average, albeit Louth has a higher than average proportion of hairdressers and beauty parlours and lower than average proportion of restaurants, cafés and takeaways.

Table 2.3: Louth Analysis of Selected Service Uses

Type of Unit	Louth		% UK* Average
	Units	%	
Restaurants/cafes/takeaways	38	40.9	45.2
Banks/other financial services	10	10.7	13.8
Estate agents/valuers	10	10.7	11.0
Travel agents	5	5.4	3.7
Hairdressers/beauty parlours	28	30.1	23.6
Laundries/dry cleaners	2	2.2	2.8
Total	**93**	**100.0**	**100.0**

Source: Goad and NLP February 2012
** UK average for all town centres surveyed by Goad Plans (May 2011)*
N.B. 'Restaurants, cafés and takeaways' does not include drinking establishments in the centre.

Other uses within Louth include a post office, Playhouse Cinema, art galleries, churches and heritage buildings, a number of pubs, bars and nightclubs, a library, a number of medical centres and dentists, churches and community centres.

A large indoor market operates daily in Louth, with open air markets operating in the town on Wednesdays, Fridays and Saturdays. A farmers market visits the centre around once every three weeks.

National Multiple Retailers

1.1 Louth is represented by 49 national multiple retailers and service providers, a proportion of 18% of total units in the town. This is slightly less than might be expected for a town of this size and status and reflects the high number of independent retailers within the town rather than an indication of the low quality of retail provision.

1.2 There are 7 major retailers are represented in the town including New Look, Boots, Clarkes, Carphone Warehouse, Superdrug, WH Smith and Wilkinsons as an indication of the attractiveness of the town to major retailers.

Vacant Units

There were 18 vacant retail units within Louth at the time of the survey, making the vacancy rate of 6.5% significantly below, or half that of, the national average at 12.9%. However, in terms of floorspace, our on site assessment produced an estimate of 13.7% vacant floorspace which is above the national average of 11.3%.

Vacant units are spread throughout the centre and are generally small scale. A number of vacant units were under refurbishment having been let as an indication of a healthy turnover of units.

Summary of Louth's Strengths and Weaknesses

Strengths

- Louth has a good range and choice of comparison shopping commensurate with its role as one of the main shopping destinations in East Lindsey.
- The centre has a number of good quality, independent convenience retailers (butchers, bakers, greengrocers and fishmongers) and is developing a reputation for high quality, independent food shopping, particularly along Eastgate.
- Within the centre, all categories of comparison retail are represented and the centre has a good range of independent retailers which adds interest and variety to the centre.
- The centre is represented by a number of national multiple retailers and key retailers which compliment the presence of a high proportion of high quality, independent comparison and convenience stores.
- The centre provides a good range of service facilities and uses complementary to its main shopping role, including leisure and entertainment facilities.
- The centre has a low vacancy rate and evidence of a healthy turnover of units and retail letting market.

- Shopping streets appear to be busy and lively with high levels of footfall. Regular indoor and outdoor markets adds further interest and footfall to the centre.
- The centre provides a high quality built environment within an attractive rural and historic setting.

Weaknesses

- Whilst the centre has a good range of independent convenience shops, food store provision is medium to small scale supermarkets with a more limited range and choice of goods. They do not offer the same range and choice as larger superstores in competing towns.
- Whilst the physical environment in Louth is of high quality, the centre does not benefit from any pedestrianised areas and pedestrian movement in places is restricted by narrow pavements and close proximity to vehicular traffic in the town.
- The centre has good public transport links by bus but no central railway station and traffic and parking within the centre is a problem during peak periods.
- Secondary shopping streets within the centre, notably Aswell Street, are characterised by the presence of lower quality shops and services and a high proportion of hot food takeaways.

B. Horncastle

Horncastle is identified as a town centre, or small market town, intended to serve a more local catchment area below Louth as the main district centre in the District.

Despite this, given the dispersed nature of the towns, Horncastle serves a wide area, with the nearest key centres including Louth, approximately 20km to the north east, and Lincoln which is 30km to the west. Horncastle also acts as a local tourist destination which is likely to attract shoppers and visitors from further afield.

Horncastle has a variety of retail and service uses with retail uses (Class A1 to A3) occupying 23,795 sq.m of gross floorspace (source: GOAD).

The key roles of Horncastle include:

- **convenience shopping**: Horncastle has two supermarkets within the centre, including a Tesco and Co-op stores. These are supported by a further smaller scale Co-op as well as a range of smaller convenience units including discount stores, newsagents, off-licence, butchers and grocers. A market operates in the centre on Thursdays and Saturdays;
- **comparison shopping**: The centre offers a small range of national multiple retailers commensurate with its size and role within the retail hierarchy. The town has a particularly high number of antique shops and independent retailers as well as the presence of national multiple retailers including Tesco, Wine Rack and the major high street banks. The majority of the comparison retail shops are concentrated along High Street and, to a lesser extent, The Bull Ring. The centre offers a small range of national multiple retailers including Boots the Chemist, as well as a number of independent retailers.
- **services**: The centre provides a range of services including a post office, high street banks, cafés, restaurants, takeaways, hairdressers, estate agents and beauty parlours;
- **entertainment**: Entertainment in Horncastle includes a number of cafés and several pubs and bars;
- **community facilities**: Horncastle provides a range of community services including a library, dentists, community hall, council offices, tourist information and advice centres.

Mix of Uses and Occupier Representation

Horncastle centre has a total of 137 retail/service (Class A) uses. The diversity of uses present in Horncastle (in terms of the number of units) against the national average is set out in Table 2.4:

Table 2.4 Horncastle Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		Horncastle %	National Average (1)
Comparison Retail	61	48.4	41.9
Convenience Retail	16	12.7	9.2
A1 Services (2)	12	9.5	11.1
A2 Services	17	13.5	9.2
A3/A5 (eating out)	13	10.3	15.7
Vacant	7	5.6	12.9
Total	**126**	**100.0**	**100.0**
A4 Pubs/Bars (3)	11	n/a	n/a

Source: Goad and NLP February 2012
(1) UK average for all town centres surveyed by Goad Plans (May 2011)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(3) Goad Plans average excludes Class A4 pubs and bars

Horncastle has a higher proportion of both comparison and convenience units when compared with the national average. The proportion of A2 services is higher than the national average, whilst representation of A1 services is slightly lower than the national average. The proportion of cafés, restaurants and takeaways in the centre is also underrepresented in the town.

As well as the number of convenience units being above the national average, convenience floorspace is also is significantly above the national average due to the presence of large scale foodstores in the town.

Retailer Representation

Horncastle centre has a good selection of comparison shops (61) in keeping with its role within the retail hierarchy. Table 2.5 provides a breakdown of comparison shop units by category.

All of the comparison categories are represented in the centre apart from variety department and catalogue; and florists. The centre provides a noticeably higher proportion of units above the national average in the categories of china, glass, gifts and fancy goods, as well as shops selling furniture, carpets and textiles. Representation of toys, hobby, cycle and sports shops is also above the national average. The centre also has a much higher proportion of antique shops which are widespread throughout the centre. The proportion of clothing and footwear units is significantly below the national average, with lower than average proportions of bookshops and chemists. The rest of the categories are largely reflective of national average figures.

Table 2.5: Horncastle Breakdown of Comparison Units

Type of Unit	Horncastle		% UK*
	Units	%	Average
Clothing and footwear	5	4.2	26.9
Furniture, carpets and textiles	9	14.7	8.7
Booksellers, arts, crafts and stationers	3	4.9	9.7
Electrical, gas, music and photography	5	8.2	9.6
DIY, hardware and homewares	3	4.9	5.9
China, glass, gifts and fancy goods	7	11.5	3.9
Cars, motorcycles and motor access.	2	3.3	3.1
Chemists, drug stores and opticians	3	4.9	9.3
Variety, department and catalogue	0	0.0	1.5
Florists, nurserymen and seedsmen	0	0.0	2.4
Toys, hobby, cycle and sport	6	9.8	5.3
Jewellers	3	4.9	4.9
Antique shops	8	)	)
Charity shops	6	) 24.6	) 8.8
Other comparison retailers	1	)	)
Total	**61**	**100.0**	**100.0**

Source: Goad and NLP February 2012
** UK average for all town centres surveyed by Goad Plans (May 2011)*

Service Uses

Horncastle has a good range of service uses, with all categories represented, as shown in Table 2.6. The representation of categories is generally similar to the national average, with the exception of a higher proportion of travel agents. Other uses within Horncastle include several pubs and bars, health centres dentists, council offices, tourist information and places of worship.

Table 2.6: Horncastle Analysis of Selected Service Uses

Type of Unit	Horncastle		% UK* Average
	Units	%	
Restaurants/cafes/takeaways	13	40.6	45.2
Banks/other financial services	4	12.5	13.8
Estate agents/valuers	4	12.5	11.0
Travel agents	2	6.3	3.7
Hairdressers/beauty parlours	8	25.0	23.6
Laundries/dry cleaners	1	3.1	2.8
Total	**32**	**100.0**	**100.0**

Source: Goad and NLP February 2012
** UK average for all town centres surveyed by Goad Plans (May 2011).*
N.B. 'Restaurants, cafés and takeaways' does not include drinking establishments in the centre.

National Multiple Retailers

1.3 17 national multiple retailers are located in Horncastle, equating to 13.5% of total units in the town. National multiple retailers include Tesco, Boots, Heron Foods, Wine Rack, Co-op Food as well as a number of charity shops and high street banks. Two key retailers including Tesco and Boots are present in the town. This is reflective of the size and status of Horncastle town centre acting below Louth in the retail hierarchy and indicates that the town is attractive to national multiple retailers and service providers.

Vacant Units

There were seven vacant retail units within Horncastle at the time of the survey, accounting for 6.5% of the total provision. This is significantly below (half that of) the national average of 12.9% and indicates a strong demand for premises within the town. Vacant units are spread throughout the centre with no noticeable clusters or long term voids.

Summary of Horncastle's Strengths and Weaknesses

Strengths

- Horncastle has a good range and choice of both convenience and comparison shopping commensurate with its role and function within the retail hierarchy.
- Food and grocery provision in the centre is good and suitable for both main and top up food shopping. There is scope for the existing Tesco to extend to further improve main food shopping within the town.
- All but two of the comparison retailer categories are represented. The centre has a good range of independent, particularly antique, shops for which the town is recognised.
- The centre provides a good range of service facilities similar to that of the national average.
- National multiple and 'key' retailers are present in the centre indicating the attractiveness of the centre to national retailers.
- The vacancy rate is very low at only half that of the national average, demonstrating that the demand for premises remains strong.
- The centre is characterised by a very high quality and historic environment providing a pleasant rural and historic retail setting.

Weaknesses

- The centre does not offer the same quality and range of facilities available in Louth. The proportion of clothing and footwear units in particular is significantly below the national average and the town lacks some larger national multiple retailers.
- The centre provides a limited range of leisure and entertainment facilities.
- The centre has good public transport links by bus but no central railway station, and accessibility to the centre appears to be mainly by car with associated problems of parking.
- None of the centre is pedestrianised leading to occasional conflicts with vehicles and segregation on different sides of shopping streets.

C. Alford

Like Horncastle, Alford is identified as a town centre, or small market town, intended to act as a secondary centre serving localised catchments and operating below Louth in the retail hierarchy. The nearest centres to Alford include Louth, 20km to the north west, and Horncastle, 25km south west.

Alford Town Centre has a variety of retail and service uses with retail uses (Class A1 to A3) occupying 5,373 sq.m of gross floorspace (source: GOAD).

The key roles of Alford include:

- **convenience shopping**: convenience shopping within Alford is limited to a small scale Co-op store on the northern edge of the centre. This is supported by a limited range and number of smaller units including newsagents, butchers, bakers, and an off-licence. Alford has a weekly market which operates on Tuesdays;
- **comparison shopping**: the centre offers limited opportunities for comparison shopping and is characterised by very few national multiples and a lack of key retailers. There are a number of independent retailers in the centre, including a number of antique and second hand shops. A craft market is present in the town twice a week during the summer months.
- **services**: Alford provides a range of services including a post office, high street banks, medical centre and dentists, hairdressers, estate agents and beauty parlours. The town has a more limited number of cafés, restaurant, takeaways;
- **entertainment**: Entertainment in the town includes a small number of cafés, restaurants and pubs as well as a number of heritage attractions;
- **community facilities**: Alford provides a small range of community services including doctors, dentists, a community hall and a library.

Mix of Uses and Occupier Representation

Alford has a total of 82 retail/service uses (excluding non-retail Class A uses). The diversity of uses present in Alford in terms of the number of units is set out in Table 2.7, compared against the national average.

Alford has a slightly higher proportion of convenience and A1 and A2 service units than the national average. Comparison retail is significantly below the national average, as is the proportion of A3 and A5 units.

Table 2.7 Alford Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		Alford %	National Average (1)
Comparison Retail	27	35.1	41.9
Convenience Retail	10	13.0	9.2
A1 Services (2)	11	14.3	11.1
A2 Services	10	13.0	9.2
A3/A5 (eating out)	8	10.4	15.7
Vacant	11	14.3	12.9
Total	**77**	**100.0**	**100.0**
A4 Pubs/Bars (3)	5	n/a	n/a

Source: Goad and NLP February 2012
(1) UK average for all town centres surveyed by Goad Plans (May 2011)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(3) Goad Plans average excludes Class A4 pubs and bars

Retailer Representation

Alford centre has an average selection of comparison shops (27), reflecting its role in the retail hierarchy in the District. Table 2.8 provides a breakdown of comparison shop units by category.

Table 2.8: Alford Breakdown of Comparison Units

Type of Unit	Alford		% UK* Average
	Units	%	
Clothing and footwear	1	3.7	26.9
Furniture, carpets and textiles	4	14.8	8.7
Booksellers, arts, crafts and stationers	0	0.0	9.7
Electrical, gas, music and photography	1	3.7	9.6
DIY, hardware and homewares	1	3.7	5.9
China, glass, gifts and fancy goods	2	7.4	3.9
Cars, motorcycles and motor access.	1	3.7	3.1
Chemists, drug stores and opticians	2	7.4	9.3
Variety, department and catalogue	1	3.7	1.5
Florists, nurserymen and seedsmen	1	3.7	2.4
Toys, hobby, cycle and sport	4	14.8	5.3
Jewellers	0	0.0	4.9
Antique/second hand shops	2	)	)
Charity shops	3	) 33.3	) 8.8
Other comparison retailers	4	)	)
Total	**27**	**100.0**	**100.0**

Source: Goad and NLP February 2012
** UK average for all town centres surveyed by Goad Plans (May 2011).*

All of the comparison categories are represented in the centre apart from booksellers, arts, crafts and stationers; and jewellers. However the number of shops in each category and the choice of shops are poor. The quality of some shops is also poor. There is a high proportion of charity and second hand shops. Like Horncastle, Alford provides a significantly higher proportion of china, glass, gifts and fancy goods stores, as well as shops selling furniture, carpets and textiles. DIY and homeware shops are also above the national average. The proportion of 'other' comparison shops, including antiques and charity shops, is also significantly above the national average. The proportion of shops in Alford selling clothing and footwear is significantly below the national average. Electrical, gas, music and photography shops are also underrepresented. The other comparison categories are reflective of the national average.

Service Uses

Alford has a reasonable range of service uses, with all categories represented in the centre, as shown in Table 2.9. The representation of categories is generally similar to the national average, with the exception of a lower proportion of restaurants, cafés and takeaways, and higher proportion of hairdressers and beauty parlours.

Table 2.9: Alford Analysis of Selected Service Uses

Type of Unit	Alford		% UK* Average
	Units	%	
Restaurants/cafes/takeaways	8	34.8	45.2
Banks/other financial services	3	11.1	13.8
Estate agents/valuers	3	11.1	11.0
Travel agents	1	4.3	3.7
Hairdressers/beauty parlours	7	30.4	23.6
Laundries/dry cleaners	1	4.3	2.8
Total	**23**	**100.0**	**100.0**

Source: Goad and NLP February 2012
** UK average for all town centres surveyed by Goad Plans (May 2011).*
N.B. 'Restaurants, cafés and takeaways' does not include drinking establishments in the centre.

Other uses within Alford include a small number of pubs and cafés, as well as a number of heritage attractions (e.g. Manor House). A market is present in the town every Tuesday, and a Craft Market operates in Alford twice a week during the summer months.

National Multiple Retailers

1.1 Very few national multiple retailers are present in the town, with only 4 units, or 5%, of total retail and service provision in the town. There are no key retailers represented in the town.

Vacant Units

There were 11 vacant units within Alford at the time of the survey, resulting in a vacancy rate of 14.3%. This is above below the national average and indicates a more limited demand for retail and service premises in the town. Vacant units are for the most part small, and appear to be spread throughout the centre with no apparent clusters or long term voids.

Vacant units within the town are limited to small scale premises with few opportunities to accommodate new operators looking to trade in Alford.

Summary of Alford's Strengths and Weaknesses

Strengths

- Alford provides a range of retail, service uses and facilities, which help meet the day to day needs of residents.
- The centre has a number of heritage assets within the town and the presence of weekly markets and a specialist craft market will help to draw people to the town.
- The centre has good public transport accessibility and provision of car parking for shoppers.

Weaknesses

- The centre does not offer the same quality and range of facilities available in either Louth or Horncastle. The choice of shops in each category is poor and the proportion of charity and second hand shops is high.
- Food and grocery provision in the centre is limited to small scale convenience stores only suitable for top up food shopping.
- There is a very low proportion of multiple retailers and a lack of key retailers indicative of the limited attractiveness of the centre to national retailers.
- The centre has a high vacancy rate yet a limited supply of premises with which to accommodate new operators looking to trade in Alford. Available vacant units are small, limiting their attractiveness.
- The centre is not pedestrianised and does not provide as high quality environment compared with Louth and Horncastle.

Appendix 3 Convenience Capacity

Table 1A : Population Projections

Catchment Area	2001	2012	2015	2018	2023	2028
1 - Louth	27,071	28,453	28,933	29,421	30,252	31,107
2 - Horncastle	9,034	9,495	9,655	9,818	10,096	10,381
3 - Alford	7,626	8,015	8,151	8,288	8,522	8,763
	43,731	**45,964**	**46,739**	**47,527**	**48,870**	**50,252**

Sources: *2001 Census Population (obtained from Experian for postcode areas)*
2011 Census of Population
Edge Analytics Growth Projections (11.8% growth between 2011 and 2031)

Table 2A: Convenience Goods Expenditure Per Capita (2010 Prices)

Catchment Area	2012	2015	2018	2023	2028	Growth 2012-2018	Growth 2012-2023	Growth 2012-2028
1 - Louth	£1,918	£1,929	£1,952	£1,998	£2,041	1.8%	4.2%	6.4%
2 - Horncastle	£1,876	£1,886	£1,909	£1,954	£1,995	1.8%	4.2%	6.3%
3 - Alford	£1,888	£1,898	£1,922	£1,967	£2,008	1.8%	4.2%	6.4%

Sources:
Experian local estimates of 2010 convenience goods expenditure per capita
Excluding special forms of trading.
Experian Business Strategies - forecast annual growth rates up to 2013.
Experian Business Strategies - mid-point between Experian's low forecast rates and the higher trend line projections adopted beyond 2013 (0.55% per annum).

Table 3A: Total Available Convenience Goods Expenditure (£M - 2010 Prices)

Catchment Area	2012	2015	2018	2023	2028	Growth 2012-2018	Growth 2012-2023	Growth 2012-2028
1 - Louth	£54.57	£55.81	£57.43	£60.44	£63.49	5.2%	5.2%	16.3%
2 - Horncastle	£17.81	£18.21	£18.74	£19.73	£20.71	5.2%	5.2%	16.3%
3 - Alford	£15.13	£15.47	£15.93	£16.76	£17.60	5.3%	5.3%	16.3%
Total	**£87.52**	**£89.49**	**£92.10**	**£96.93**	**£101.80**	**5.2%**	**5.2%**	**16.3%**

Sources: *Table 1A and Table 2A*

Table 4A: Existing Convenience Facilities - Benchmark Turnover 2012

Town	Net Sales Floorspace sq m	Convenience Sales Floorspace (%)	Convenience Floorspace sq m (net)	Turnover Density (£/sq m)	Total Convenience Turnover £/m
Louth					
Morrison's	1,424	85%	1,210	12,400	£15.01
Co-op, town centre	1,445	90%	1,301	7,279	£9.47
Heron Foods	200	80%	160	5,000	£0.80
Lincolnshire Co-op	278	95%	264	7,279	£1.92
Other Louth Town Centre Convenience Shops	1,400	95%	1,330	4,000	£5.32
Louth Sub-total	**4,747**		**4,265**	**7,624**	**£32.52**
Horncastle					
Tesco	1,037	85%	881	12,432	£10.96
Co-op	916	90%	824	7,279	£6.00
Lincolnshire Co-op	217	95%	206	7,279	£1.50
Heron Foods	180	95%	171	5,000	£0.86
Other Horncastle Town Centre Convenience Shops	600	95%	570	4,000	£2.28
Horncastle Sub-total	**2,950**		**2,653**	**8,140**	**£21.59**
Alford					
Lincolnshire Co-op	368	90%	331	7,279	£2.41
Other Alford Town Centre Convenience Shops	350	95%	333	4,000	£1.33
Alford Sub-total	**718**		**664**	**5,636**	**£3.74**
TOTAL	**8,415**		**7,582**	**7,631**	**£57.85**

Table 5A: Convenience Shopping Market Shares 2012

Town/Facilities	Zone 1 Louth	Zone 2 Horncastle	Zone 3 Alford	% Inflow
Louth				
Morrison's	35.3%	2.2%	8.3%	10.0%
Co-op	19.5%	0.0%	3.4%	5.0%
Heron Foods	2.8%	0.0%	0.9%	5.0%
Lincolnshire Co-op	2.6%	0.0%	0.5%	5.0%
Other Louth	12.1%	0.0%	0.9%	5.0%
Sub-Total	**72.3%**	**2.2%**	**14.0%**	
Horncastle				
Tesco	0.7%	40.8%	1.7%	15.0%
Co-op	0.0%	23.0%	0.3%	10.0%
Lincolnshire Co-op	0.0%	1.3%	0.0%	10.0%
Heron Foods	0.0%	5.3%	0.0%	10.0%
Other Horncastle	0.3%	8.4%	0.0%	10.0%
Sub-Total	**1.0%**	**78.8%**	**2.0%**	
Alford				
Lincolnshire Co-op	0.0%	0.5%	16.5%	5.0%
Other Alford	0.0%	0.0%	14.3%	5.0%
Sub-Total	**0.0%**	**0.5%**	**30.8%**	
Cleethorpe	7.9%	0.0%	0.9%	90.0%
Grimsby	12.8%	0.4%	3.1%	95.0%
Lincoln	1.5%	8.4%	0.8%	98.0%
Mablethorpe	2.0%	0.0%	13.0%	90.0%
Skegness	0.0%	1.5%	27.2%	90.0%
Splisby	0.1%	1.4%	4.8%	70.0%
Other	2.4%	6.8%	3.4%	95.0%
Sub-Total	**26.7%**	**18.5%**	**53.2%**	
Market Share Total	**100.0%**	**100.0%**	**100.0%**	

Source: *NEMS household surveys 2012*

Table 6A: **Convenience Expenditure 2012 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	% Inflow	Total Expend
Expenditure 2012	**£54.57**	**£17.81**	**£15.13**	**n/a**	
Louth					
Morrison's	£19.26	£0.39	£1.26	£2.32	£23.24
Co-op	£10.64	£0.00	£0.51	£0.59	£11.74
Heron Foods	£1.53	£0.00	£0.14	£0.09	£1.75
Lincolnshire Co-op	£1.42	£0.00	£0.08	£0.08	£1.57
Other Louth	£6.60	£0.00	£0.14	£0.35	£7.09
Sub-total	**£39.46**	**£0.39**	**£2.12**	**£3.43**	**£45.40**
Horncastle					
Tesco	£0.38	£7.27	£0.26	£1.40	£9.30
Co-op	£0.00	£4.10	£0.05	£0.46	£4.60
Lincolnshire Co-op	£0.00	£0.23	£0.00	£0.03	£0.26
Heron Foods	£0.00	£0.94	£0.00	£0.10	£1.05
Other Horncastle	£0.16	£1.50	£0.00	£0.18	£1.84
Sub-total	**£0.55**	**£14.04**	**£0.30**	**£2.17**	**£17.06**
Alford					
Lincolnshire Co-op	£0.00	£0.09	£2.50	£0.14	£2.72
Other Alford	£0.00	£0.00	£2.16	£0.11	£2.28
Sub-total	**£0.00**	**£0.09**	**£4.66**	**£0.25**	**£5.00**
Cleethorpe	£4.31	£0.00	£0.14	£40.03	£44.47
Grimsby	£6.99	£0.07	£0.47	£142.99	£150.51
Lincoln	£0.82	£1.50	£0.12	£119.36	£121.80
Mablethorpe	£1.09	£0.00	£1.97	£27.53	£30.59
Skegness	£0.00	£0.27	£4.12	£39.45	£43.83
Splisby	£0.05	£0.25	£0.73	£2.40	£3.43
Other	£1.31	£1.21	£0.51	£57.68	£60.71
Sub-Total	**£14.57**	**£3.30**	**£8.05**	**£429.44**	**£455.35**
Total	**£54.57**	**£17.81**	**£15.13**	**n/a**	**£522.81**

Sources: Table 3A and 5A

Table 7A: **Convenience Expenditure 2015 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	% Inflow	Total Expend
Expenditure 2015	**£55.81**	**£18.21**	**£15.47**	**n/a**	
Louth					
Morrison's	£19.70	£0.40	£1.28	£2.38	£23.76
Co-op	£10.88	£0.00	£0.53	£0.60	£12.01
Heron Foods	£1.56	£0.00	£0.14	£0.09	£1.79
Lincolnshire Co-op	£1.45	£0.00	£0.08	£0.08	£1.61
Other Louth	£6.75	£0.00	£0.14	£0.36	£7.26
Sub-total	**£40.35**	**£0.40**	**£2.17**	**£3.51**	**£46.43**
Horncastle					
Tesco	£0.39	£7.43	£0.26	£1.43	£9.51
Co-op	£0.00	£4.19	£0.05	£0.47	£4.71
Lincolnshire Co-op	£0.00	£0.24	£0.00	£0.03	£0.26
Heron Foods	£0.00	£0.97	£0.00	£0.11	£1.07
Other Horncastle	£0.17	£1.53	£0.00	£0.19	£1.89
Sub-total	**£0.56**	**£14.35**	**£0.31**	**£2.22**	**£17.44**
Alford					
Lincolnshire Co-op	£0.00	£0.09	£2.55	£0.14	£2.78
Other Alford	£0.00	£0.00	£2.21	£0.12	£2.33
Sub-total	**£0.00**	**£0.09**	**£4.76**	**£0.26**	**£5.11**
Cleethorpe	£4.41	£0.00	£0.14	£40.94	£45.48
Grimsby	£7.14	£0.07	£0.48	£146.23	£153.93
Lincoln	£0.84	£1.53	£0.12	£122.04	£124.53
Mablethorpe	£1.12	£0.00	£2.01	£28.15	£31.27
Skegness	£0.00	£0.27	£4.21	£40.33	£44.81
Splisby	£0.06	£0.25	£0.74	£2.46	£3.51
Other	£1.34	£1.24	£0.53	£58.97	£62.07
Sub-Total	**£14.90**	**£3.37**	**£8.23**	**£439.10**	**£465.60**
Total	**£55.81**	**£18.21**	**£15.47**	**n/a**	**£534.58**

Sources: Table 3A and 5A

Table 8A: **Convenience Expenditure 2018 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	% Inflow	Total Expend
Expenditure 2018	**£57.43**	**£18.74**	**£15.93**	**n/a**	
Louth					
Morrison's	£20.27	£0.41	£1.32	£2.45	£24.45
Co-op	£11.20	£0.00	£0.54	£0.62	£12.36
Heron Foods	£1.61	£0.00	£0.14	£0.09	£1.84
Lincolnshire Co-op	£1.49	£0.00	£0.08	£0.08	£1.66
Other Louth	£6.95	£0.00	£0.14	£0.37	£7.47
Sub-total	**£41.52**	**£0.41**	**£2.23**	**£3.61**	**£47.78**
Horncastle					
Tesco	£0.40	£7.65	£0.27	£1.47	£9.79
Co-op	£0.00	£4.31	£0.05	£0.48	£4.84
Lincolnshire Co-op	£0.00	£0.24	£0.00	£0.03	£0.27
Heron Foods	£0.00	£0.99	£0.00	£0.11	£1.10
Other Horncastle	£0.17	£1.57	£0.00	£0.19	£1.94
Sub-total	**£0.57**	**£14.77**	**£0.32**	**£2.28**	**£17.95**
Alford					
Lincolnshire Co-op	£0.00	£0.09	£2.63	£0.14	£2.87
Other Alford	£0.00	£0.00	£2.28	£0.12	£2.40
Sub-total	**£0.00**	**£0.09**	**£4.91**	**£0.26**	**£5.26**
Cleethorpe	£4.54	£0.00	£0.14	£42.12	£46.80
Grimsby	£7.35	£0.07	£0.49	£150.48	£158.40
Lincoln	£0.86	£1.57	£0.13	£125.60	£128.16
Mablethorpe	£1.15	£0.00	£2.07	£28.97	£32.19
Skegness	£0.00	£0.28	£4.33	£41.53	£46.14
Splisby	£0.06	£0.26	£0.76	£2.53	£3.61
Other	£1.38	£1.27	£0.54	£60.69	£63.89
Sub-Total	**£15.33**	**£3.47**	**£8.47**	**£451.92**	**£479.20**
Total	**£57.43**	**£18.74**	**£15.93**	**n/a**	**£550.18**

Sources: Table 3A and 5A

Table 9A: **Convenience Expenditure 2023 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	% Inflow	Total Expend
Expenditure 2023	**£60.44**	**£19.73**	**£16.76**	**n/a**	
Louth					
Morrison's	£21.34	£0.43	£1.39	£2.57	£25.74
Co-op	£11.79	£0.00	£0.57	£0.65	£13.01
Heron Foods	£1.69	£0.00	£0.15	£0.10	£1.94
Lincolnshire Co-op	£1.57	£0.00	£0.08	£0.09	£1.74
Other Louth	£7.31	£0.00	£0.15	£0.39	£7.86
Sub-total	**£43.70**	**£0.43**	**£2.35**	**£3.80**	**£50.28**
Horncastle					
Tesco	£0.42	£8.05	£0.28	£1.55	£10.30
Co-op	£0.00	£4.54	£0.05	£0.51	£5.10
Lincolnshire Co-op	£0.00	£0.26	£0.00	£0.03	£0.28
Heron Foods	£0.00	£1.05	£0.00	£0.12	£1.16
Other Horncastle	£0.18	£1.66	£0.00	£0.20	£2.04
Sub-total	**£0.60**	**£15.54**	**£0.34**	**£2.40**	**£18.89**
Alford					
Lincolnshire Co-op	£0.00	£0.10	£2.77	£0.15	£3.02
Other Alford	£0.00	£0.00	£2.40	£0.13	£2.52
Sub-total	**£0.00**	**£0.10**	**£5.16**	**£0.28**	**£5.54**
Cleethorpe	£4.78	£0.00	£0.15	£44.33	£49.26
Grimsby	£7.74	£0.08	£0.52	£158.37	£166.71
Lincoln	£0.91	£1.66	£0.13	£132.19	£134.89
Mablethorpe	£1.21	£0.00	£2.18	£30.49	£33.88
Skegness	£0.00	£0.30	£4.56	£43.70	£48.55
Splisby	£0.06	£0.28	£0.80	£2.66	£3.80
Other	£1.45	£1.34	£0.57	£63.88	£67.24
Sub-Total	**£16.14**	**£3.65**	**£8.92**	**£475.63**	**£504.34**
Total	**£60.44**	**£19.73**	**£16.76**	**n/a**	**£579.05**

Sources: Table 3A and 5A

Table 10A: Convenience Expenditure 2028 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	% Inflow	Total Expend
Expenditure 2028	**£63.49**	**£20.71**	**£17.60**	**n/a**	
Louth					
Morrison's	£22.41	£0.46	£1.46	£2.70	£27.03
Co-op	£12.38	£0.00	£0.60	£0.68	£13.66
Heron Foods	£1.78	£0.00	£0.16	£0.10	£2.04
Lincolnshire Co-op	£1.65	£0.00	£0.09	£0.09	£1.83
Other Louth	£7.68	£0.00	£0.16	£0.41	£8.25
Sub-total	**£45.90**	**£0.46**	**£2.46**	**£3.99**	**£52.81**
Horncastle					
Tesco	£0.44	£8.45	£0.30	£1.62	£10.82
Co-op	£0.00	£4.76	£0.05	£0.54	£5.35
Lincolnshire Co-op	£0.00	£0.27	£0.00	£0.03	£0.30
Heron Foods	£0.00	£1.10	£0.00	£0.12	£1.22
Other Horncastle	£0.19	£1.74	£0.00	£0.21	£2.14
Sub-total	**£0.63**	**£16.32**	**£0.35**	**£2.52**	**£19.83**
Alford					
Lincolnshire Co-op	£0.00	£0.10	£2.90	£0.16	£3.17
Other Alford	£0.00	£0.00	£2.52	£0.13	£2.65
Sub-total	**£0.00**	**£0.10**	**£5.42**	**£0.29**	**£5.81**
Cleethorpe	£5.02	£0.00	£0.16	£46.57	£51.74
Grimsby	£8.13	£0.08	£0.55	£166.35	£175.10
Lincoln	£0.95	£1.74	£0.14	£138.81	£141.64
Mablethorpe	£1.27	£0.00	£2.29	£32.02	£35.57
Skegness	£0.00	£0.31	£4.79	£45.87	£50.97
Splisby	£0.06	£0.29	£0.84	£2.80	£3.99
Other	£1.52	£1.41	£0.60	£67.08	£70.61
Sub-Total	**£16.95**	**£3.83**	**£9.36**	**£499.48**	**£529.62**
Total	**£63.49**	**£20.71**	**£17.60**	**n/a**	**£608.08**

Sources: Table 3A and 5A

Table 11A: Convenience Floorspace Capacity - Constant Market Shares

Centre/Facilities	2012	2015	2018	2023	2028
Available Expenditure					
Louth	£45.40	£46.43	£47.78	£50.28	£52.81
Horncastle	£17.06	£17.44	£17.95	£18.89	£19.83
Alford	£5.00	£5.11	£5.26	£5.54	£5.81
Total	**£67.45**	**£68.97**	**£70.98**	**£74.71**	**£78.46**
Benchmark Turnover of Existing Facilities					
Louth	£32.52	£32.52	£32.52	£32.52	£32.52
Horncastle	£21.59	£21.59	£21.59	£21.59	£21.59
Alford	£3.74	£3.74	£3.74	£3.74	£3.74
Total	**£57.85**	**£57.85**	**£57.85**	**£57.85**	**£57.85**
Surplus Expenditure					
Louth	£12.88	£13.91	£15.26	£17.77	£20.30
Horncastle	-£4.54	-£4.16	-£3.65	-£2.71	-£1.76
Alford	£1.26	£1.37	£1.52	£1.80	£2.07
Total	**£9.60**	**£11.12**	**£13.13**	**£16.86**	**£20.61**
Turnover Density New Floorspace £ per sq m	£10,000	£10,000	£10,000	£10,000	£10,000
Sales Floorspace (Sq M Net)					
Louth	1,288	1,391	1,526	1,777	2,030
Horncastle	-454	-416	-365	-271	-176
Alford	126	137	152	180	207
Total	**960**	**1,112**	**1,313**	**1,686**	**2,061**
Gross Floorspace (Sq M)					
Louth	1,840	1,987	2,180	2,538	2,900
Horncastle	-648	-594	-521	-387	-252
Alford	180	196	217	257	296
Total	**1,372**	**1,589**	**1,876**	**2,408**	**2,944**

Sources: Tables 6A to 11A

Table 12A: **Uplifted Convenience Shopping Market Shares 2012**

Town/Facilities	Zone 1 Louth	Zone 2 Horncastle	Zone 3 Alford	% Inflow
Louth	75.0%	1.0%	4.0%	8.0%
Horncastle	1.0%	85.0%	1.0%	13.0%
Alford	0.0%	0.0%	80.0%	10.0%
Sub-Total	**76.0%**	**86.0%**	**85.0%**	
Elsewhere	24.0%	14.0%	15.0%	
Market Share Total	**100.0%**	**100.0%**	**100.0%**	

Source: *Table 5A with NLP adjustments*

Table 13A: **Convenience Floorspace Capacity - Uplifted Market Shares**

Centre/Facilities	2012	2015	2018	2023	2028
Available Expenditure					
Louth	£45.40	£46.37	£47.71	£50.22	£52.75
Horncastle	£17.06	£18.61	£19.16	£20.16	£21.17
Alford	£5.00	£13.75	£14.16	£14.90	£15.64
Total	**£67.45**	**£78.73**	**£81.03**	**£85.28**	**£89.56**
Benchmark Turnover of Existing Facilities					
Louth	£32.52	£32.52	£32.52	£32.52	£32.52
Horncastle	£21.59	£21.59	£21.59	£21.59	£21.59
Alford	£3.74	£3.74	£3.74	£3.74	£3.74
Total	**£57.85**	**£57.85**	**£57.85**	**£57.85**	**£57.85**
Surplus Expenditure					
Louth	£12.88	£13.85	£15.20	£17.70	£20.23
Horncastle	-£4.54	-£2.98	-£2.44	-£1.43	-£0.43
Alford	£1.26	£10.01	£10.42	£11.16	£11.90
Total	**£9.60**	**£20.88**	**£23.18**	**£27.43**	**£31.70**
Turnover Density New Floorspace £ per sq m	£10,000	£10,000	£10,000	£10,000	£10,000
Sales Floorspace (Sq M Net)					
Louth	1,288	1,385	1,520	1,770	2,023
Horncastle	-454	-298	-244	-143	-43
Alford	126	1,001	1,042	1,116	1,190
Total	**960**	**2,088**	**2,318**	**2,743**	**3,170**
Gross Floorspace (Sq M)					
Louth	1,840	1,979	2,171	2,529	2,890
Horncastle	-648	-426	-348	-205	-61
Alford	180	1,430	1,488	1,594	1,700
Total	**1,372**	**2,983**	**3,311**	**3,918**	**4,529**

Appendix 4 Comparison Capacity

Table 1B: Comparison Goods Expenditure Per Capita (2010 Prices)

Catchment Area	2012	2015	2018	2023	2028	Growth 2012-2018	Growth 2012-2023	Growth 2012-2028
1 - Louth	£2,453	£2,680	£3,047	£3,788	£4,709	24.2%	54.4%	92.0%
2 - Horncastle	£2,340	£2,557	£2,907	£3,614	£4,493	24.2%	54.4%	92.0%
3 - Alford	£2,234	£2,441	£2,776	£3,451	£4,290	24.3%	54.5%	92.0%

Sources:

Experian local estimates for 2010 comparison goods expenditure per capita

Excluding special forms of trading.

Experian Business Strategies - forecast annual growth rates up to 2013.

Experian Business Strategies - mid-point between Experian's low forecast rates and the higher trend line projections adopted beyond 2013 (4.45% per annum).

Table 2B: Total Available Comparison Goods Expenditure (£M - 2010 Prices)

Catchment Area	2012	2015	2018	2023	2028	Growth 2012-2018	Growth 2012-2023	Growth 2012-2028
1 - Louth	£69.80	£77.54	£89.65	£114.60	£146.48	28.4%	28.4%	109.9%
2 - Horncastle	£22.22	£24.69	£28.54	£36.49	£46.64	28.5%	28.5%	109.9%
3 - Alford	£17.91	£19.90	£23.01	£29.41	£37.59	28.5%	28.5%	109.9%
Total	**£109.92**	**£122.12**	**£141.19**	**£180.49**	**£230.72**	**28.5%**	**28.5%**	**109.9%**

Sources: *Table 1A and Table 1B*

Table 3B: Existing Comparison Facilities

Town Centre Comparison Shops	Gross Floorspace sq m	Net Sales Floorspace sq m	Average Sales Density per sq m	Benchmark Turnover £M
Louth				
Town Centre Comparison Shops	17,700	11,505	£4,000	£46.02
B&Q DIY store	2,507	2,330	£2,500	£5.83
Louth Sub-total	**n/a**	**13,835**	**£3,747**	**£51.85**
Horncastle				
Town Centre Comparison Shops	n/a	3,600	£3,000	£10.80
Horncastle Sub-total	**n/a**	**3,600**	**£3,000**	**£10.80**
Alford				
Town Centre Comparison Shops	n/a	1,400	£3,000	£4.20
Alford Sub-total	**n/a**	**1,400**	**£3,000**	**£4.20**
TOTAL	**n/a**	**18,835**		**£66.85**

Source: GOAD, NLP

Table 4B: Comparison Shopping Market Shares and Available Expenditure 2012

Centre/Facilities	Zone 1 Louth	Zone 2 Horncastle	Zone 3 Alford	% Inflow	Total
Expenditure 2012	**£69.80**	**£22.22**	**£17.91**	**n/a**	**£109.92**
Market Share					
Louth	57%	6%	17%	10%	
Horncastle	1%	35%	1%	15%	
Alford	1%	1%	12%	10%	
Cleethorpes	3%	0%	1%	95%	
Grimsby	30%	2%	19%	90%	
Lincoln	5%	39%	9%	95%	
Mablethorpe	1%	0%	4%	90%	
Skegness	0%	2%	27%	90%	
Other	2%	15%	10%	95%	
Total	**100%**	**100%**	**100%**	**n/a**	
Turnover £M					
Louth Town centre	£39.78	£1.33	£3.04	£4.91	£49.07
Horncastle	£0.70	£7.78	£0.18	£1.53	£10.18
Alford	£0.70	£0.22	£2.15	£0.34	£3.41
Cleethorpe	£2.09	£0.00	£0.18	£43.19	£45.46
Grimsby	£20.94	£0.44	£3.40	£223.07	£247.85
Lincoln	£3.49	£8.67	£1.61	£261.57	£275.33
Mablethorpe	£0.70	£0.00	£0.72	£12.73	£14.14
Skegness	£0.00	£0.44	£4.83	£47.51	£52.79
Other	£1.40	£3.33	£1.79	£123.87	£130.39
Total	**£69.80**	**£22.22**	**£17.91**	**£718.70**	**£828.62**

Sources: *Table 2B*
NEMS Household Surveys 2012

Table 5B: **Comparison Shopping Market Shares and Available Expenditure 2015**

Centre/Facilities	Zone 1 Louth	Zone 2 Horncastle	Zone 3 Alford	% Inflow	Total
Expenditure 2015	**£77.54**	**£24.69**	**£19.90**	**n/a**	**£122.12**
Market Share					
Louth	57%	6%	17%	10%	
Horncastle	1%	35%	1%	15%	
Alford	1%	1%	12%	10%	
Cleethorpe	3%	0%	1%	95%	
Grimsby	30%	2%	19%	90%	
Lincoln	5%	39%	9%	95%	
Mablethorpe	1%	0%	4%	90%	
Skegness	0%	2%	27%	90%	
Other	2%	15%	10%	95%	
Total	**100%**	**100%**	**100%**	**n/a**	
Turnover £M					
Louth Town centre	£44.20	£1.48	£3.38	£5.45	£54.51
Horncastle	£0.78	£8.64	£0.20	£1.70	£11.31
Alford	£0.78	£0.25	£2.39	£0.38	£3.79
Cleethorpe	£2.33	£0.00	£0.20	£47.98	£50.50
Grimsby	£23.26	£0.49	£3.78	£247.82	£275.36
Lincoln	£3.88	£9.63	£1.79	£290.63	£305.92
Mablethorpe	£0.78	£0.00	£0.80	£14.14	£15.71
Skegness	£0.00	£0.49	£5.37	£52.79	£58.66
Other	£1.55	£3.70	£1.99	£137.63	£144.87
Total	**£77.54**	**£24.69**	**£19.90**	**£798.52**	**£920.64**

Sources: *Table 2B*
NEMS Household Surveys 2012

Table 6B: **Comparison Shopping Market Shares and Available Expenditure 2018**

Centre/Facilities	Zone 1 Louth	Zone 2 Horncastle	Zone 3 Alford	% Inflow	Total
Expenditure 2018	**£89.65**	**£28.54**	**£23.01**	**n/a**	**£141.19**
Market Share					
Louth	57%	6%	17%	10%	
Horncastle	1%	35%	1%	15%	
Alford	1%	1%	12%	10%	
Cleethorpes	3%	0%	1%	95%	
Grimsby	30%	2%	19%	90%	
Lincoln	5%	39%	9%	95%	
Mablethorpe	1%	0%	4%	90%	
Skegness	0%	2%	27%	90%	
Other	2%	15%	10%	95%	
Total	**100%**	**100%**	**100%**	**n/a**	
Turnover £M					
Louth Town centre	£51.10	£1.71	£3.91	£6.30	£63.02
Horncastle	£0.90	£9.99	£0.23	£1.96	£13.08
Alford	£0.90	£0.29	£2.76	£0.44	£4.38
Cleethorpe	£2.69	£0.00	£0.23	£55.47	£58.39
Grimsby	£26.89	£0.57	£4.37	£286.52	£318.36
Lincoln	£4.48	£11.13	£2.07	£336.00	£353.68
Mablethorpe	£0.90	£0.00	£0.92	£16.35	£18.17
Skegness	£0.00	£0.57	£6.21	£61.05	£67.83
Other	£1.79	£4.28	£2.30	£159.12	£167.50
Total	**£89.65**	**£28.54**	**£23.01**	**£923.21**	**£1,064.40**

Sources: *Table 2B*
NEMS Household Surveys 2012

Table 6B: Comparison Shopping Market Shares and Available Expenditure 2023

Centre/Facilities	Zone 1 Louth	Zone 2 Horncastle	Zone 3 Alford	% Inflow	Total
Expenditure 2023	**£114.60**	**£36.49**	**£29.41**	**n/a**	**£180.49**
Market Share					
Louth	57%	6%	17%	10%	
Horncastle	1%	35%	1%	15%	
Alford	1%	1%	12%	10%	
Cleethorpes	3%	0%	1%	95%	
Grimsby	30%	2%	19%	90%	
Lincoln	5%	39%	9%	95%	
Mablethorpe	1%	0%	4%	90%	
Skegness	0%	2%	27%	90%	
Other	2%	15%	10%	95%	
Total	**100%**	**100%**	**100%**	**n/a**	
Turnover £M					
Louth Town centre	£65.32	£2.19	£5.00	£8.06	£80.57
Horncastle	£1.15	£12.77	£0.29	£2.51	£16.72
Alford	£1.15	£0.36	£3.53	£0.56	£5.60
Cleethorpe	£3.44	£0.00	£0.29	£70.91	£74.64
Grimsby	£34.38	£0.73	£5.59	£366.27	£406.96
Lincoln	£5.73	£14.23	£2.65	£429.52	£452.12
Mablethorpe	£1.15	£0.00	£1.18	£20.90	£23.22
Skegness	£0.00	£0.73	£7.94	£78.03	£86.70
Other	£2.29	£5.47	£2.94	£203.41	£214.12
Total	**£114.60**	**£36.49**	**£29.41**	**£1,180.16**	**£1,360.65**

Sources: *Table 2B*
NEMS Household Surveys 2012

Table 7B: **Comparison Shopping Market Shares and Available Expenditure 2028**

Centre/Facilities	Zone 1 Louth	Zone 2 Horncastle	Zone 3 Alford	% Inflow	Total
Expenditure 2028	**£146.48**	**£46.64**	**£37.59**	**n/a**	**£230.72**
Market Share					
Louth	57%	6%	17%	10%	
Horncastle	1%	35%	1%	15%	
Alford	1%	1%	12%	10%	
Cleethorpes	3%	0%	1%	95%	
Grimsby	30%	2%	19%	90%	
Lincoln	5%	39%	9%	95%	
Mablethorpe	1%	0%	4%	90%	
Skegness	0%	2%	27%	90%	
Other	2%	15%	10%	95%	
Total	**100%**	**100%**	**100%**	**n/a**	
Turnover £M					
Louth Town centre	£83.50	£2.80	£6.39	£10.30	£102.98
Horncastle	£1.46	£16.32	£0.38	£3.21	£21.37
Alford	£1.46	£0.47	£4.51	£0.72	£7.16
Cleethorpe	£4.39	£0.00	£0.38	£90.64	£95.41
Grimsby	£43.95	£0.93	£7.14	£468.19	£520.21
Lincoln	£7.32	£18.19	£3.38	£549.06	£577.96
Mablethorpe	£1.46	£0.00	£1.50	£26.72	£29.69
Skegness	£0.00	£0.93	£10.15	£99.75	£110.83
Other	£2.93	£7.00	£3.76	£260.02	£273.71
Total	**£146.48**	**£46.64**	**£37.59**	**£1,508.60**	**£1,739.32**

Sources: *Table 2B*
NEMS Household Surveys 2012

Table 8B: Comparison Retail Capacity and Floorspace Projections - Constant Market Shares

	2012	2015	2018	2023	2028
A - Available Expenditure £M					
Louth	£49.07	£54.51	£63.02	£80.57	£102.98
Horncastle	£10.18	£11.31	£13.08	£16.72	£21.37
Alford	£3.41	£3.79	£4.38	£5.60	£7.16
Total	**£62.66**	**£69.61**	**£80.48**	**£102.88**	**£131.51**
B - Turnover Existing Floorspace £M					
Louth	£51.85	£54.53	£57.36	£62.41	£67.90
Horncastle	£10.80	£11.36	£11.95	£13.00	£14.14
Alford	£4.20	£4.42	£4.65	£5.06	£5.50
Total	**£66.85**	**£70.31**	**£73.96**	**£80.46**	**£87.54**
C - Surplus Expenditure £M A - B					
Louth	-£2.78	-£0.02	£5.66	£18.16	£35.09
Horncastle	-£0.62	-£0.05	£1.13	£3.72	£7.23
Alford	-£0.79	-£0.63	-£0.27	£0.54	£1.66
Total	**-£4.19**	**-£0.70**	**£6.52**	**£22.42**	**£43.97**
D - Sales Density for New Floorspace £ PSM Net	£4,000	£4,207	£4,426	£4,815	£5,238
E - Retail Sales Floorspace Capacity Sq M Net					
Louth	-694	-5	1,279	3,771	6,698
Horncastle	-155	-11	255	772	1,380
Alford	-198	-150	-60	113	317
Total	**-1,047**	**-166**	**1,474**	**4,656**	**8,395**
F - Gross Retail Floorspace Capacity Sq M					
Louth	-926	-7	1,705	5,028	8,931
Horncastle	-206	-15	340	1,029	1,840
Alford	-263	-199	-80	151	422
Total	**-1,396**	**-221**	**1,965**	**6,208**	**11,193**

Sources: *Tables 3A, 3C to 6C*

Notes: *Turnover efficiency of 1.7% per annum applied*

Appendix 5 Household Survey Results

Household Survey Results

Survey Structure

NEMS Market Research carried out a telephone survey of 500 households across the East Lindsey study area in March 2012. The study area was split into three zones, based on the postcode sectors of the three study towns of Louth, Horncastle and Alford.

All respondents in the survey interviews are people who are responsible for most of the shopping in each household, and therefore the sample is not representative of all adults. There is an over-representation of women and older adults.

The number of interviews undertaken reflects the population in each zone in order to provide statistically reliable sub-samples. The main aims of the survey were to establish patterns for the following:

- Main food and top up grocery shopping;
- Non-food shopping, including:
  - clothing and footwear;
  - domestic electrical appliances;
  - other electrical goods (TV, Hi-Fi and computers);
  - furniture, soft furnishing or carpets;
  - DIY/hardware items and garden items;
  - chemist, health and beauty items; and
  - Other non-food items (eg. books, CDs, DVDs, toys and gifts).

Main Food Shopping

Large food stores are the main destination for respondents' last main food shopping trip across the study area. Overall, the Morrisons in Louth was the most popular shopping destination (26.4%), followed by Tesco in Horncastle (13.1%) for the study area as a whole. This is closely followed by the Co-op at Northgate, Louth (11.9%). Different zones recorded different responses as the most popular destination for their main food shopping trip:

- **Zone 1 – Louth:** Morrisons, Louth (26.4%), followed by Co-op, Northgate, Louth (19.2%);
- **Zone 2 – Horncastle:** Tesco, Horncastle (56.8%), followed by Co-op, Conging Street Horncastle (18.9%);
- **Zone 3 – Alford:** Morrisons, Skegness (16.0%), followed by Tesco, Skegness (13.0%), Co-op, Alford (12.0%). Lidl Mablethorpe (11%) and Morrisons, Louth (11%).

Overall, 6.4% of respondents chose to do their last main food shopping on the internet and have it delivered, which is a relatively high figure, and this may be due to East Lindsey being a predominantly rural district.

Mode of Travel for Main Food Shopping

In the whole study area, 84.5% of respondents indicated that they travel to do their main food shopping by car (both driver and passenger) which is significantly higher than the NLP average derived from similar surveys across the country (74.6%). 11.3% walk to their main food shopping destination which is in line with the NLP average of 11.7%. A much lower proportion of households travel by bus (0.8%) compared to the NLP averages derived from other surveys of 8.6%. The number of all respondents (0.6%) using a bike to travel to their last main shopping location is slightly higher than the NLP average of 0.5%. These differences when compared with NLP's national average generally reflect lower levels of public transport usage within rural districts with market towns when compared with major cities and metropolitan authorities.

Top-Up Food Shopping

Top-up food shopping trips are normally made to supplement main food shopping trips and are undertaken on a more frequent basis for staples such as bread and milk. Overall 82% of households across the catchment area indicated that they undertake small-scale or top-up shopping trips in addition to their main food shopping trips.

The overall results show that, while the main food stores remain dominant, top-up shopping trips are dispersed over a larger number of stores, with the most popular two stores overall – Morrisons, Louth and Co-op Northgate, Louth – accounting for just 11.7% and 8.5% of trips respectively. "Local shops" in the Study Area account for 31.7% of all responses.

Local Shopping Trips

Respondents were asked if they carry out any other activities while they were on their last main food shop. 61.6% of respondents confirmed that they did carry out any other form of activity. The most popular activity was to carry out non food shopping at the same time (30.4%), followed by going shopping for other food items (27%) and visiting a bank or post office (21.9%).

Non-Food Shopping

Respondents were asked in which location they buy most of their household's non-food shopping, as split into the different categories of non food retail items.

Clothing/footwear: the most popular destination was Grimsby (28%), followed by Louth (20.3%) Lincoln (17.5%) and internet/mail order shopping (8.9%).

Electrical goods: the most popular destination where respondents last purchased domestic electrical appliances such as fridges or kitchen items was Louth (30.4%). This was followed by on the internet (16.7%), and Grimsby (11.7%).

Louth was also the most popular response as the location respondents last bought other kinds of electrical goods, such as TVs, Hi-Fis and computers, with 24.1% of all respondents, again followed by on the internet (16.1%), and Grimsby (15.1%).

Furniture/Furnishings/Floor coverings: Louth was the most popular destination for furniture, furnishings and floor coverings (30.2% of all respondents), followed by Grimsby (11.9%) and Lincoln (8.7% each). 6.8% of respondents last bought furniture, soft furnishings or floor coverings on the internet/mail order.

DIY/Hardware/Garden items: the most popular destination in the study area respondents last shopped at for DIY/hardware and garden items was Louth (43.1% of all respondents), followed by Grimsby (10.3%) and Horncastle (8.9%). Only 1.6% of respondents last bought DIY/hardware and garden items on the internet/mail order.

Pharmaceutical/Health/Beauty items: Louth was the most popular destination (49.3%), followed by Horncastle (13.1%) and Alford (8.2%) (these are heavily weighted to each zone). 3.6% of respondents last bought pharmaceutical, health and beauty items on the internet/mail order.

Books, CDs, toys and gifts: 29% of all respondents last bought "other" items such as books, CDs, toys and gifts on the internet. The next most popular destination was Louth (19.9%), followed by Grimsby (12.5%).

Table 5.1 shows the shopping destination with the highest proportion of respondents for each comparison goods category in each zone. This indicates broadly where people prefer to shop for each type of goods and allows comparison between each zone.

Table 5.1: Destinations with Highest Proportion of Response

Zone	Louth	Horncastle	Alford
Clothing/Footwear	Grimsby	Lincoln	Grimsby
Domestic Appliances	Louth	Horncastle	Skegness
Electrical Goods	Louth	Horncastle	Skegness
Furniture/Carpets	Louth	Lincoln	Louth
DIY/Hardware	Louth	Horncastle	Louth
Chemist/Beauty	Louth	Horncastle	Alford
Books/CDs/Toys/ Gifts	Louth	Horncastle	Skegness

Source: NEMS Household Survey, March 2012

Rating of Centres

Respondents were asked to rate centres using a range of different factors, and the average score for each centre is shown in Table 5.2. Scores of under 2 suggest an overall rating of "poor" to "very poor" (shown in red). Scores of 4 to 5 suggest an overall rating of "good" or "very good"(shown in green). Scores of between 2 to 4 suggest a neutral rating with equal proportions rating the centre as "good" or "poor". In terms of being "good" or "poor", the centres were rated as follows:

Louth – two factors rated as "good";

Horncastle – one factor was rated as "good";

Alford – one factor was rated as "good", and one factor was rated as "poor".

Respondents were least satisfied with bus services (particularly in Alford) and parking charges. Personal safety was rated "good" in all three centres. The general shopping environment scored highly in Louth.

All three Centres have a broadly similar score, with the average score for Horncastle being the highest (3.49), followed by Louth (3.47) and Alford (3.01).

Table 5.2: Centre Ratings

Centre	Louth	Horncastle	Alford
Availability of parking	**3.17**	**3.46**	**3.35**
Parking charges	**2.87**	**3.24**	**2.76**
Traffic congestion	**2.71**	**3.12**	**3.63**
Bus services/facilities	**2.85**	**3.68**	**1.89**
Personal safety	**4.15**	**4.08**	**4.25**
Range of shops and services available	**3.68**	**3.23**	**2.41**
Quality of shops and services available	**3.98**	**3.57**	**2.8**
Quality/number of places to eat/ drink	**3.87**	**3.60**	**3.1**
General shopping environment	**4**	**3.67**	**2.99**
Size/quality of supermarket(s)	**3.43**	**3.29**	**2.87**
Average Score	**3.47**	**3.49**	**3.01**

Source: NEMS Household Survey, October 2011

Based on a scoring system of 1 for very poor, 2 poor, 3 neutral, 4 good and 5 for very good

Green *= Good to Very Good (4-5);* ***Black*** *= Neutral (2-4);* ***Red*** *= Poor to Very Poor (0-2)*

Role of the Centre

Louth is the most visited of the three centres, with 84.3% of respondents across the whole study area visiting Louth to use shops, services or a market. This compares to 36.4% of respondents who visit Horncastle and only 19.7% of respondents who visit Alford.

Around a third of those who visit Louth do so once a week (32.3%) and just over a quarter (27.1%) visit 2-3 times a week. Less than 10% (9.4%) visit Louth every day. Around a 20% visit Horncastle once to 2-3 times a week respectively, with over a quarter (25.7%) visiting once a month. 14.2% of respondents visit Horncastle everyday. The majority visit Alford once, or 2-3 times a week (27.3% respectively). 14.1 visit Alford everyday.

When asked what would make the respondents visit the three centres more often the largest response was nothing (38% in Louth; 48.1% in Horncastle; and 33.3% in Alford. This was followed by having better quality shops in general (9.7% for Louth, 15.8% in Horncastle and 27.2% in Alford).

In Louth, 14.6% responded that having more food supermarkets would make them visit more often, followed by having more car parking (11.6%).

Food Store Provision

Respondents were asked if they would like to see a new large food supermarket in each of the three towns.

Over half of respondents overall said they would not like to see a new foodstore in Louth (50.2%), whilst 34.2% said they would. 10.8% said that it would depend on where it would be located or who the store operator would be.

Again, over half of the respondents say they would not like to see a new foodstore in Horncastle (54.6%), whilst around a third said they would (32.2). Around 5% confirmed that this would depend on where the store was to be located, and who the store operator would be.

Views were split down the middle over whether the respondents wanted to see a new food supermarket in Alford, with 46.5% saying yes and 44.4% saying no.

Q01 At which store or shop did you last do your household's main food and grocery shopping?

	Total		Louth		Horncastle		Alford	
Aldi, Cambridge Road, Grimsby	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Asda, Sleaford Road, Boston	0.8%	4	0.0%	0	1.8%	2	2.0%	2
Asda, Corporation Road, Grimsby	3.2%	16	4.8%	14	0.9%	1	1.0%	1
Asda, Holles Street, Alexandra Dock, Grimsby (Former Netto)	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Asda, Wolsey Way, Nettleham Road, Lincoln	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Co-op, Church Street, Alford	2.6%	13	0.0%	0	0.9%	1	12.0%	12
Co-op, Conging Street, Horncastle	4.2%	21	0.0%	0	18.9%	21	0.0%	0
Co-op, Newbridge Hill, Louth	0.4%	2	0.3%	1	0.0%	0	1.0%	1
Co-op, Northgate, Louth	11.9%	60	19.2%	56	0.0%	0	4.0%	4
Heron Foods, Market Place, Horncastle	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Heron Foods, Eastgate, Louth	1.0%	5	1.7%	5	0.0%	0	0.0%	0
Lidl, Ladysmith Road, Grimsby	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Lidl, High Street, Mablethorpe	3.4%	17	2.1%	6	0.0%	0	11.0%	11
Lidl, Richmond Drive, Skegness	0.6%	3	0.0%	0	0.0%	0	3.0%	3
Morrisons, Horncastle Road, Boston	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Morrisons, Hilmore Road, Laceby, Cleethorpes	1.8%	9	3.1%	9	0.0%	0	0.0%	0
Morrisons, Tritton Road, Lincoln	0.4%	2	0.0%	0	1.8%	2	0.0%	0
Morrisons, Eastgate, Louth	26.4%	133	41.1%	120	1.8%	2	11.0%	11
Morrisons, Wainfleet Road, Skegness	3.2%	16	0.0%	0	0.0%	0	16.0%	16
Sainsbury's, Corporation Road, Grimsby	2.0%	10	3.4%	10	0.0%	0	0.0%	0
Sainsbury's, Boston Road, Spilsby	1.4%	7	0.0%	0	0.9%	1	6.0%	6
Sainsbury's Local, Littlefield Lane, Grimsby	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Tesco Extra, Hewitts Circus Retail Park, Cleethorpes	4.2%	21	7.2%	21	0.0%	0	0.0%	0
Tesco Extra, Market Street, Off Victoria Street, Grimsby	2.6%	13	3.8%	11	0.0%	0	2.0%	2
Tesco, New Hammond Beck Road, Wyberton Fen, Boston	0.6%	3	0.0%	0	2.7%	3	0.0%	0
Tesco, Watermill Road, Horncastle	13.1%	66	0.3%	1	56.8%	63	2.0%	2
Tesco, Wragby Road, Lincoln	1.0%	5	1.0%	3	0.9%	1	1.0%	1
Tesco, Linwood Road, Market Rasen	0.6%	3	0.7%	2	0.9%	1	0.0%	0
Tesco, Richmond Drive, Skegness	2.6%	13	0.0%	0	0.0%	0	13.0%	13
Waitrose, Searby Road, Lincoln	0.4%	2	0.3%	1	0.9%	1	0.0%	0
Local Shops - Alford	0.4%	2	0.0%	0	0.0%	0	2.0%	2
Local Shops - Horncastle	0.4%	2	0.0%	0	1.8%	2	0.0%	0
Local Shops - Louth	0.4%	2	0.7%	2	0.0%	0	0.0%	0
Internet / Mail Order	6.4%	32	6.8%	20	4.5%	5	7.0%	7
Asda, Phoenix Park Way, Corby	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Co-op, High Street, Horncastle	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Co-op, Seacroft Road, Mablethorpe	1.0%	5	0.3%	1	0.0%	0	4.0%	4
Heron Foods, High Street, Mablethorpe	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Morrisons, Mariners Way,	0.2%	1	0.3%	1	0.0%	0	0.0%	0

Column %ges.

	Total		Louth		Horncastle		Alford	
Riversway, Preston								
Morrisons, Wardentree Lane, Pinchbeck, Spalding	0.4%	2	0.0%	0	1.8%	2	0.0%	0
(Don't do this type of shopping)	0.6%	3	1.0%	3	0.0%	0	0.0%	0
Base:		503		292		111		100

Q02 While you were on your last main shop did you, (or anyone else with you) carry out any of the following activities? [MR/PR]
Not those who said Internet at Q01

	Total		Louth		Horncastle		Alford	
Go to Bank, Post Office, Building Society or Cash Point	21.9%	103	22.8%	62	17.9%	19	23.7%	22
Get Petrol	14.0%	66	14.7%	40	6.6%	7	20.4%	19
Go shopping for other food items	27.0%	127	28.7%	78	22.6%	24	26.9%	25
Go shopping for non food items	30.4%	143	32.4%	88	22.6%	24	33.3%	31
Go window shopping / browsing	12.3%	58	11.8%	32	11.3%	12	15.1%	14
Go to hairdressers, dry cleaners, or other service	3.0%	14	2.9%	8	2.8%	3	3.2%	3
Use sports / leisure or entertainment facilities (including library, cafe etc)	11.5%	54	11.4%	31	11.3%	12	11.8%	11
Other	0.6%	3	0.4%	1	0.9%	1	1.1%	1
Visit friends / family	1.3%	6	1.1%	3	1.9%	2	1.1%	1
(Nothing else)	38.4%	181	37.9%	103	43.4%	46	34.4%	32
Base:		471		272		106		93

Q03 Is there any other store or shop you use to do your main food and grocery shopping?

	Total		Louth		Horncastle		Alford	
Aldi, Queen Street, Boston	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Aldi, Cambridge Road, Grimsby	0.8%	4	1.4%	4	0.0%	0	0.0%	0
Aldi, Cleethorpes Road, Grimsby (Near Railway Station)	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Asda, Sleaford Road, Boston	0.8%	4	0.0%	0	3.6%	4	0.0%	0
Asda, Corporation Road, Grimsby	3.0%	15	4.1%	12	0.0%	0	3.0%	3
Asda, Holles Street, Alexandra Dock, Grimsby (Former Netto)	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Asda, Wolsey Way, Nettleham Road, Lincoln	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Co-op, Church Street, Alford	3.0%	15	0.0%	0	0.0%	0	15.0%	15
Co-op, Conging Street, Horncastle	3.4%	17	0.0%	0	14.4%	16	1.0%	1
Co-op, Newbridge Hill, Louth	0.8%	4	1.4%	4	0.0%	0	0.0%	0
Co-op, Northgate, Louth	7.8%	39	13.0%	38	0.0%	0	1.0%	1
Heron Foods, Market Place, Horncastle	1.2%	6	0.0%	0	5.4%	6	0.0%	0
Heron Foods, Eastgate, Louth	1.4%	7	1.7%	5	0.0%	0	2.0%	2
Iceland, Berry Road, Skegness	0.4%	2	0.0%	0	0.0%	0	2.0%	2
Lidl, Ladysmith Road, Grimsby	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Lidl, St Marks Retail Park, Tritton Road, Lincoln	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Lidl, High Street, Mablethorpe	1.8%	9	0.7%	2	0.0%	0	7.0%	7
Lidl, Richmond Drive, Skegness	0.6%	3	0.0%	0	0.0%	0	3.0%	3
Marks & Spencer, Victoria Street, Grimsby	0.4%	2	0.7%	2	0.0%	0	0.0%	0
Marks & Spencer, High Street, Lincoln	0.6%	3	0.7%	2	0.9%	1	0.0%	0
Morrisons, Horncastle Road, Boston	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Morrisons, Hilmore Road, Laceby, Cleethorpes	1.2%	6	2.1%	6	0.0%	0	0.0%	0
Morrisons, Tritton Road, Lincoln	1.4%	7	0.3%	1	5.4%	6	0.0%	0
Morrisons, Eastgate, Louth	12.9%	65	18.5%	54	3.6%	4	7.0%	7
Morrisons, Wainfleet Road, Skegness	2.4%	12	0.0%	0	2.7%	3	9.0%	9
Sainsbury's, Corporation Road, Grimsby	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Sainsbury's, Boston Road, Spilsby	0.8%	4	0.0%	0	2.7%	3	1.0%	1
Tesco Extra, Hewitts Circus Retail Park, Cleethorpes	2.8%	14	3.8%	11	0.0%	0	3.0%	3
Tesco Extra, Market Street, Off Victoria Street, Grimsby	4.2%	21	6.5%	19	0.0%	0	2.0%	2
Tesco, New Hammond Beck Road, Wyberton Fen, Boston	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Tesco, Watermill Road, Horncastle	4.6%	23	0.7%	2	17.1%	19	2.0%	2
Tesco, Canwick Road Trading Estate, Lincoln	0.4%	2	0.0%	0	1.8%	2	0.0%	0
Tesco, Wragby Road, Lincoln	0.6%	3	0.3%	1	0.9%	1	1.0%	1
Tesco, Linwood Road, Market Rasen	0.4%	2	0.3%	1	0.9%	1	0.0%	0
Tesco, Richmond Drive, Skegness	3.6%	18	0.0%	0	0.9%	1	17.0%	17
Waitrose, Searby Road, Lincoln	0.6%	3	0.3%	1	1.8%	2	0.0%	0
Local Shops - Alford	0.6%	3	0.0%	0	0.0%	0	3.0%	3

Column %ges.

	Total		Louth		Horncastle		Alford	
Local Shops - Horncastle	0.8%	4	0.0%	0	3.6%	4	0.0%	0
Local Shops - Louth	4.8%	24	7.9%	23	0.0%	0	1.0%	1
Local Shops - Mablethorpe	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Internet / Mail Order	2.2%	11	1.4%	4	3.6%	4	3.0%	3
Co-op, Clarence Road, Woodhall Spa	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Co-op, Seacroft Road, Mablethorpe	0.8%	4	0.7%	2	0.0%	0	2.0%	2
Co-op, Silver Street, Coningsby, Lincoln	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Co-op, Tentercroft Street, Lincoln	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Heron Foods, High Street, Mablethorpe	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Local Shops - Donington on Bain	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Local Shops - Westbury, Wiltshire	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Sainsbury's Local, St. Peters Avenue, Cleethorpes	0.2%	1	0.3%	1	0.0%	0	0.0%	0
(Don't know / can't remember)	0.6%	3	0.7%	2	0.0%	0	1.0%	1
(Nowhere else)	25.2%	127	30.8%	90	24.3%	27	10.0%	10
Base:		503		292		111		100

Q04 How do you normally travel to do your main food shopping?
Not those who said Internet at Q01

	Total		Louth		Horncastle		Alford	
Car-driver	72.8%	343	73.2%	199	63.2%	67	82.8%	77
Car-passenger	11.7%	55	11.4%	31	13.2%	14	10.8%	10
Bus / coach	0.8%	4	0.7%	2	0.0%	0	2.2%	2
Disabled vehicle (e.g. mobility scooter)	0.8%	4	1.1%	3	0.9%	1	0.0%	0
Train	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Taxi	0.4%	2	0.7%	2	0.0%	0	0.0%	0
Walk	11.3%	53	10.3%	28	19.8%	21	4.3%	4
Bicycle	0.6%	3	0.4%	1	1.9%	2	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Not applicable - goods delivered)	1.1%	5	1.5%	4	0.9%	1	0.0%	0
(Don't know / varies)	0.4%	2	0.7%	2	0.0%	0	0.0%	0
Base:		471		272		106		93

Q05 In addition to your main food shopping, at which store or shop did you last visit for small scale / top-up shopping for things such as bread, milk or newspapers?

	Total		Louth		Horncastle		Alford	
Asda, Wolsey Way, Nettleham Road, Lincoln	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Co-op, Church Street, Alford	3.6%	18	0.0%	0	0.0%	0	18.0%	18
Co-op, Conging Street, Horncastle	6.0%	30	0.0%	0	27.0%	30	0.0%	0
Co-op, Newbridge Hill, Louth	3.6%	18	6.2%	18	0.0%	0	0.0%	0
Co-op, Northgate, Louth	8.5%	43	13.7%	40	0.0%	0	3.0%	3
Co-op, The Hildreds Centre, Skegness	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Heron Foods, Market Place, Horncastle	2.2%	11	0.0%	0	9.9%	11	0.0%	0
Heron Foods, Eastgate, Louth	2.6%	13	4.1%	12	0.0%	0	1.0%	1
Lidl, High Street, Mablethorpe	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Marks & Spencer, Victoria Street, Grimsby	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Morrisons, Tritton Road, Lincoln	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Morrisons, Eastgate, Louth	11.7%	59	19.9%	58	0.0%	0	1.0%	1
Morrisons, Wainfleet Road, Skegness	0.4%	2	0.0%	0	0.9%	1	1.0%	1
Sainsbury's, Boston Road, Spilsby	1.0%	5	0.3%	1	0.0%	0	4.0%	4
Tesco, Watermill Road, Horncastle	4.2%	21	0.7%	2	17.1%	19	0.0%	0
Tesco, Canwick Road Trading Estate, Lincoln	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Tesco, Wragby Road, Lincoln	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Tesco, Richmond Drive, Skegness	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Local Shops - Alford	7.8%	39	0.0%	0	0.0%	0	39.0%	39
Local Shops - Connigsby	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Local Shops - Grimsby	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Local Shops - Horncastle	5.2%	26	1.0%	3	20.7%	23	0.0%	0
Local Shops - Louth	17.1%	86	28.8%	84	0.0%	0	2.0%	2
Local Shops - Mablethorpe	1.0%	5	0.7%	2	0.0%	0	3.0%	3
Local Shops - Sutton on Sea	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Co-op, Clarence Road, Woodhall Spa	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Co-op, High Street, Horncastle	0.6%	3	0.0%	0	2.7%	3	0.0%	0
Co-op, Pinfold Lane, Holton le Clay, Grimsby	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Co-op, Ryland Road, Lincoln	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Local Shops - Donington on Bain	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Local Shops - Hutton	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Local Shops - Manby	0.8%	4	1.4%	4	0.0%	0	0.0%	0
Local Shops - Marshchapel	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Local Shops - North Somercotes	0.6%	3	1.0%	3	0.0%	0	0.0%	0
Local Shops - Saltfleet	0.4%	2	0.7%	2	0.0%	0	0.0%	0
Local Shops - Somercotes	0.4%	2	0.7%	2	0.0%	0	0.0%	0
Local Shops - South Reston	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Local Shops - Withern	0.4%	2	0.0%	0	0.0%	0	2.0%	2
(Don’t know / can't remember)	0.6%	3	0.7%	2	0.9%	1	0.0%	0
(Don't do this type of shopping)	17.9%	90	17.8%	52	15.3%	17	21.0%	21
Base:		503		292		111		100

Q06 At which town centre, retail park or other location did your household last buy clothes or shoes ?

	Total		Louth		Horncastle		Alford	
Boston	4.4%	22	0.7%	2	11.7%	13	7.0%	7
Cleethorpes	1.6%	8	2.7%	8	0.0%	0	0.0%	0
Doncaster	0.4%	2	0.7%	2	0.0%	0	0.0%	0
Grimsby	28.0%	141	37.7%	110	2.7%	3	28.0%	28
Horncastle	1.2%	6	0.0%	0	5.4%	6	0.0%	0
Hull	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Lincoln	17.5%	88	6.8%	20	50.5%	56	12.0%	12
Louth	20.3%	102	29.5%	86	7.2%	8	8.0%	8
Mablethorpe	1.0%	5	1.0%	3	0.0%	0	2.0%	2
Nottingham	0.6%	3	0.7%	2	0.0%	0	1.0%	1
Scunthorpe	0.6%	3	0.7%	2	0.9%	1	0.0%	0
Sheffield	0.6%	3	0.7%	2	0.0%	0	1.0%	1
Skegness	4.0%	20	0.0%	0	2.7%	3	17.0%	17
Spilsby	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Alexandra Retail Park, Grimsby (Comet, SCS)	0.6%	3	0.7%	2	0.0%	0	1.0%	1
Victoria Retail Park, Grimsby (Next)	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Internet / mail order / catalogue	8.9%	45	8.6%	25	9.0%	10	10.0%	10
Abroad	0.4%	2	0.3%	1	0.9%	1	0.0%	0
Colne	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Bradford	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Castleford	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Central London	0.4%	2	0.3%	1	0.9%	1	0.0%	0
Cheshire Oaks Designer Outlet Shopping Centre, Ellesmere Port	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Grantham	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Junction 32 Outlet Shopping Village, Castleford	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Manchester	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Meadowhall Centre, Sheffield	0.4%	2	0.7%	2	0.0%	0	0.0%	0
Newcastle under Lyme	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Norwich	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Oakham	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Peterborough	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Stevenage	0.2%	1	0.0%	0	0.0%	0	1.0%	1
The Carlton Centre, Lincoln	0.2%	1	0.0%	0	0.9%	1	0.0%	0
York	0.2%	1	0.0%	0	0.9%	1	0.0%	0
York Designer Outlet, York	0.4%	2	0.7%	2	0.0%	0	0.0%	0
(Don't know / can't remember)	3.0%	15	3.4%	10	1.8%	2	3.0%	3
(Don't buy these type of goods)	2.4%	12	2.1%	6	1.8%	2	4.0%	4
Base:		503		292		111		100

Q07 At which town centre, retail park or other location did your household last buy domestic electric appliances (e.g. fridges and kitchen items) ?

	Total		Louth		Horncastle		Alford	
Alford	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Boston	3.0%	15	0.0%	0	13.5%	15	0.0%	0
Cleethorpes	1.0%	5	1.7%	5	0.0%	0	0.0%	0
Connigsby	1.4%	7	0.0%	0	6.3%	7	0.0%	0
Grimsby	11.7%	59	16.8%	49	0.9%	1	9.0%	9
Horncastle	5.4%	27	0.3%	1	23.4%	26	0.0%	0
Hull	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Lincoln	4.6%	23	1.0%	3	14.4%	16	4.0%	4
Louth	30.4%	153	46.9%	137	3.6%	4	12.0%	12
Mablethorpe	3.2%	16	1.0%	3	0.0%	0	13.0%	13
Scunthorpe	0.4%	2	0.3%	1	0.9%	1	0.0%	0
Sheffield	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Skegness	3.6%	18	0.0%	0	0.0%	0	18.0%	18
Spilsby	0.8%	4	0.0%	0	1.8%	2	2.0%	2
Alban Retail Park, Boston (Currys, Comet, Homebase)	0.4%	2	0.0%	0	1.8%	2	0.0%	0
Alexandra Retail Park, Grimsby (Comet, SCS)	2.2%	11	3.8%	11	0.0%	0	0.0%	0
High Point Retail Park, Grimsby (Currys, Carpetright)	1.8%	9	3.1%	9	0.0%	0	0.0%	0
Victoria Retail Park, Grimsby (Next)	0.4%	2	0.3%	1	0.0%	0	1.0%	1
Tritton Retail Park, Tritton Road, Lincoln (Currys, Carpetright, Pets at Home)	1.2%	6	0.7%	2	1.8%	2	2.0%	2
Skegness Retail Park, Wainfleet Road, Skegness (Currys, Halfords)	1.2%	6	0.0%	0	0.9%	1	5.0%	5
Internet / mail order / catalogue	16.7%	84	15.1%	44	15.3%	17	23.0%	23
Leeds	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Market Rasen	0.6%	3	0.0%	0	1.8%	2	1.0%	1
Newcastle under Lyme	0.2%	1	0.0%	0	0.0%	0	1.0%	1
York	0.2%	1	0.3%	1	0.0%	0	0.0%	0
(Don't know / can't remember)	2.6%	13	1.7%	5	3.6%	4	4.0%	4
(Don't buy these type of goods)	6.4%	32	6.5%	19	9.0%	10	3.0%	3
Base:		503		292		111		100

Q08 At which town centre, retail park or other location did your household last buy other kinds of electric goods such as TV / Hi-Fi and computers ?

	Total		Louth		Horncastle		Alford	
Boston	2.0%	10	0.0%	0	9.0%	10	0.0%	0
Cleethorpes	1.8%	9	3.1%	9	0.0%	0	0.0%	0
Connigsby	0.8%	4	0.0%	0	3.6%	4	0.0%	0
Grimsby	15.1%	76	21.2%	62	1.8%	2	12.0%	12
Horncastle	6.2%	31	0.0%	0	27.9%	31	0.0%	0
Hull	0.6%	3	1.0%	3	0.0%	0	0.0%	0
Lincoln	8.2%	41	2.4%	7	24.3%	27	7.0%	7
Louth	24.1%	121	36.6%	107	2.7%	3	11.0%	11
Mablethorpe	2.0%	10	0.0%	0	0.0%	0	10.0%	10
Skegness	3.8%	19	0.3%	1	0.0%	0	18.0%	18
Spilsby	1.0%	5	0.0%	0	1.8%	2	3.0%	3
Alban Retail Park, Boston (Currys, Comet, Homebase)	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Alexandra Retail Park, Grimsby (Comet, SCS)	2.4%	12	4.1%	12	0.0%	0	0.0%	0
High Point Retail Park, Grimsby (Currys, Carpetright)	0.8%	4	1.4%	4	0.0%	0	0.0%	0
Victoria Retail Park, Grimsby (Next)	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Tritton Retail Park, Tritton Road, Lincoln (Currys, Carpetright, Pets at Home)	1.0%	5	1.0%	3	0.9%	1	1.0%	1
Skegness Retail Park, Wainfleet Road, Skegness (Currys, Halfords)	1.4%	7	0.0%	0	1.8%	2	5.0%	5
Internet / mail order / catalogue	16.1%	81	18.2%	53	8.1%	9	19.0%	19
Central London	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Market Rasen	0.6%	3	0.0%	0	1.8%	2	1.0%	1
Hewitts Circus Retail Park, Cleethorpes	0.2%	1	0.3%	1	0.0%	0	0.0%	0
(Don't know / can't remember)	2.6%	13	1.0%	3	3.6%	4	6.0%	6
(Don't buy these type of goods)	8.9%	45	8.6%	25	11.7%	13	7.0%	7
Base:		503		292		111		100

Q09 At which town centre, retail park or other location did your household last buy furniture, soft furnishings or floor-coverings ?

	Total		Louth		Horncastle		Alford	
Alford	2.2%	11	0.3%	1	0.0%	0	10.0%	10
Boston	4.8%	24	0.3%	1	12.6%	14	9.0%	9
Grimsby	11.9%	60	16.4%	48	0.9%	1	11.0%	11
Horncastle	3.4%	17	0.0%	0	14.4%	16	1.0%	1
Lincoln	8.7%	44	4.5%	13	24.3%	27	4.0%	4
Louth	30.2%	152	44.2%	129	3.6%	4	19.0%	19
Mablethorpe	0.8%	4	0.0%	0	0.0%	0	4.0%	4
Nottingham	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Skegness	0.6%	3	0.0%	0	0.9%	1	2.0%	2
Spilsby	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Alban Retail Park, Boston (Currys, Comet, Homebase)	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Alexandra Retail Park, Grimsby (Comet, SCS)	0.6%	3	0.7%	2	0.0%	0	1.0%	1
Victoria Retail Park, Grimsby (Next)	1.0%	5	1.4%	4	0.0%	0	1.0%	1
Valentine Shopping Park, Lincoln (Next, TK Maxx, Dreams)	0.4%	2	0.3%	1	0.0%	0	1.0%	1
Tritton Retail Park, Tritton Road, Lincoln (Currys, Carpetright, Pets at Home)	1.4%	7	1.4%	4	2.7%	3	0.0%	0
Skegness Retail Park, Wainfleet Road, Skegness (Currys, Halfords)	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Internet / mail order / catalogue	6.8%	34	6.5%	19	6.3%	7	8.0%	8
Abroad	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Bolton	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Brigg	1.0%	5	1.4%	4	0.0%	0	1.0%	1
Chapel St Leonards	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Chester	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Fotherby	2.0%	10	3.1%	9	0.9%	1	0.0%	0
Gainsborough	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Grantham	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Macclesfield	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Market Rasen	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Newark on Trent	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Newcastle under Lyme	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Somercotes	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Woodhall Spa	0.8%	4	0.0%	0	3.6%	4	0.0%	0
Woodthorpe	0.2%	1	0.0%	0	0.0%	0	1.0%	1
(Don't know / can't remember)	4.6%	23	5.1%	15	1.8%	2	6.0%	6
(Don't buy these type of goods)	15.7%	79	12.0%	35	27.0%	30	14.0%	14
Base:		503		292		111		100

Q10 At which town centre, retail park or other location did your household last buy DIY / hardware/gardening items ?

	Total		Louth		Horncastle		Alford	
Alford	3.2%	16	0.0%	0	0.9%	1	15.0%	15
Boston	1.0%	5	0.0%	0	3.6%	4	1.0%	1
Cleethorpes	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Connigsby	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Grimsby	10.3%	52	14.4%	42	0.9%	1	9.0%	9
Horncastle	8.9%	45	0.0%	0	40.5%	45	0.0%	0
Lincoln	5.2%	26	1.0%	3	19.8%	22	1.0%	1
Louth	43.1%	217	63.7%	186	9.0%	10	21.0%	21
Mablethorpe	1.0%	5	0.3%	1	0.0%	0	4.0%	4
Scunthorpe	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Skegness	2.4%	12	0.0%	0	0.0%	0	12.0%	12
Sutton on Sea	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Alexandra Retail Park, Grimsby (Comet, SCS)	0.2%	1	0.3%	1	0.0%	0	0.0%	0
High Point Retail Park, Grimsby (Currys, Carpetright)	0.4%	2	0.7%	2	0.0%	0	0.0%	0
Victoria Retail Park, Grimsby (Next)	0.6%	3	1.0%	3	0.0%	0	0.0%	0
Tritton Retail Park, Tritton Road, Lincoln (Currys, Carpetright, Pets at Home)	0.6%	3	0.0%	0	1.8%	2	1.0%	1
Skegness Retail Park, Wainfleet Road, Skegness (Currys, Halfords)	1.2%	6	0.0%	0	0.9%	1	5.0%	5
Internet / mail order / catalogue	1.6%	8	0.7%	2	0.9%	1	5.0%	5
Fairfield Industrial Estate, Louth	0.6%	3	1.0%	3	0.0%	0	0.0%	0
Market Rasen	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Swadlincote	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Woodthorpe	1.0%	5	0.3%	1	0.9%	1	3.0%	3
Woodthorpe Hall Garden Centre, Woodthorpe	0.6%	3	0.3%	1	0.0%	0	2.0%	2
(Don't know / can't remember)	3.2%	16	2.4%	7	4.5%	5	4.0%	4
(Don't buy these type of goods)	13.7%	69	13.0%	38	15.3%	17	14.0%	14
Base:		503		292		111		100

Q11 At which town centre, retail park or other location did your household last buy health, beauty and chemist items ?

	Total		Louth		Horncastle		Alford	
Alford	8.2%	41	0.0%	0	0.0%	0	41.0%	41
Boston	0.8%	4	0.0%	0	2.7%	3	1.0%	1
Cleethorpes	1.2%	6	1.7%	5	0.0%	0	1.0%	1
Grimsby	5.2%	26	7.9%	23	0.0%	0	3.0%	3
Horncastle	13.1%	66	0.3%	1	58.6%	65	0.0%	0
Lincoln	4.2%	21	0.3%	1	15.3%	17	3.0%	3
Louth	49.3%	248	79.5%	232	3.6%	4	12.0%	12
Mablethorpe	1.0%	5	0.7%	2	0.0%	0	3.0%	3
Skegness	4.2%	21	0.0%	0	0.9%	1	20.0%	20
Spilsby	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Internet / mail order / catalogue	3.6%	18	3.4%	10	1.8%	2	6.0%	6
Central London	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Chapel St Leonards	0.2%	1	0.0%	0	0.0%	0	1.0%	1
Market Rasen	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Melton Mowbray	0.2%	1	0.3%	1	0.0%	0	0.0%	0
North Somercotes	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Woodhall Spa	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Wragby	0.2%	1	0.0%	0	0.9%	1	0.0%	0
(Don't know / can't remember)	0.4%	2	0.3%	1	0.9%	1	0.0%	0
(Don't buy these type of goods)	7.4%	37	5.1%	15	13.5%	15	7.0%	7
Base:		503		292		111		100

Q12 At which town centre, retail park or other location did your household last buy other non-food items such as books, CDs, toys and gifts ?

	Total		Louth		Horncastle		Alford	
Alford	0.4%	2	0.0%	0	0.0%	0	2.0%	2
Boston	1.0%	5	0.0%	0	3.6%	4	1.0%	1
Cleethorpes	1.6%	8	2.4%	7	0.0%	0	1.0%	1
Connigsby	0.2%	1	0.0%	0	0.9%	1	0.0%	0
Grimsby	12.5%	63	18.5%	54	0.9%	1	8.0%	8
Horncastle	5.0%	25	0.0%	0	22.5%	25	0.0%	0
Lincoln	6.4%	32	1.7%	5	20.7%	23	4.0%	4
Louth	19.9%	100	30.8%	90	1.8%	2	8.0%	8
Mablethorpe	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Scunthorpe	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Skegness	4.2%	21	0.0%	0	0.9%	1	20.0%	20
Internet / mail order / catalogue	29.0%	146	28.8%	84	21.6%	24	38.0%	38
Donington on Bain	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Hewitts Circus Retail Park, Cleethorpes	0.2%	1	0.3%	1	0.0%	0	0.0%	0
(Don't know / can't remember)	1.6%	8	1.7%	5	1.8%	2	1.0%	1
(Don't buy these type of goods)	17.5%	88	14.7%	43	25.2%	28	17.0%	17
Base:		503		292		111		100

Q13 Do you visit any of the following town centres to use shops, other services or a market? [PR]

Louth

	Total		Louth		Horncastle		Alford	
Yes	84.3%	424	98.6%	288	56.8%	63	73.0%	73
No	15.7%	79	1.4%	4	43.2%	48	27.0%	27
Base:		503		292		111		100

Alford

	Total		Louth		Horncastle		Alford	
Yes	19.7%	99	3.8%	11	4.5%	5	83.0%	83
No	80.3%	404	96.2%	281	95.5%	106	17.0%	17
Base:		503		292		111		100

Horncastle

	Total		Louth		Horncastle		Alford	
Yes	36.4%	183	19.9%	58	92.8%	103	22.0%	22
No	63.6%	320	80.1%	234	7.2%	8	78.0%	78
Base:		503		292		111		100

Q14 How often do you visit shops, other services or a market in Louth?
Those who visit Louth at Q13

	Total		Louth		Horncastle		Alford	
Everyday	9.4%	40	12.8%	37	0.0%	0	4.1%	3
2-3 times a week	27.1%	115	35.8%	103	1.6%	1	15.1%	11
Once a week	32.3%	137	39.6%	114	14.3%	9	19.2%	14
Once a fortnight	9.0%	38	7.3%	21	9.5%	6	15.1%	11
Once a month	11.1%	47	3.5%	10	33.3%	21	21.9%	16
Less than once a month	10.4%	44	0.3%	1	39.7%	25	24.7%	18
(Don't know / varies)	0.7%	3	0.7%	2	1.6%	1	0.0%	0
(Refused)	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Base:		424		288		63		73

Q15 How would you rate Louth in respect of the following factors, using a scale of 1-5, where 1 is 'very poor' and 5 is 'very good'? [PR]
Those who visit Louth at Q13

Availability of parking

	Total		Louth		Horncastle		Alford	
1 (very poor)	12.0%	51	15.3%	44	6.3%	4	4.1%	3
2	16.5%	70	18.8%	54	14.3%	9	9.6%	7
3	26.7%	113	28.8%	83	15.9%	10	27.4%	20
4	19.8%	84	18.1%	52	25.4%	16	21.9%	16
5 (very good)	18.2%	77	11.5%	33	28.6%	18	35.6%	26
(Don’t know)	6.8%	29	7.6%	22	9.5%	6	1.4%	1
Mean:		*3.17*		*2.91*		*3.61*		*3.76*
Base:		424		288		63		73

Parking charges

	Total		Louth		Horncastle		Alford	
1 (very poor)	14.9%	63	15.6%	45	6.3%	4	19.2%	14
2	15.6%	66	17.0%	49	15.9%	10	9.6%	7
3	25.7%	109	25.3%	73	25.4%	16	27.4%	20
4	17.2%	73	14.9%	43	25.4%	16	19.2%	14
5 (very good)	8.7%	37	9.4%	27	7.9%	5	6.8%	5
(Don't know)	17.9%	76	17.7%	51	19.0%	12	17.8%	13
Mean:		*2.87*		*2.82*		*3.16*		*2.82*
Base:		424		288		63		73

Traffic congestion

	Total		Louth		Horncastle		Alford	
1 (very poor)	19.8%	84	24.3%	70	14.3%	9	6.8%	5
2	21.0%	89	22.6%	65	14.3%	9	20.5%	15
3	30.0%	127	28.5%	82	38.1%	24	28.8%	21
4	19.3%	82	15.6%	45	27.0%	17	27.4%	20
5 (very good)	6.6%	28	4.9%	14	6.3%	4	13.7%	10
(Don't know)	3.3%	14	4.2%	12	0.0%	0	2.7%	2
Mean:		*2.71*		*2.52*		*2.97*		*3.21*
Base:		424		288		63		73

Bus services/facilities

	Total		Louth		Horncastle		Alford	
1 (very poor)	9.4%	40	10.1%	29	4.8%	3	11.0%	8
2	7.1%	30	6.3%	18	9.5%	6	8.2%	6
3	7.8%	33	9.7%	28	3.2%	2	4.1%	3
4	11.1%	47	13.5%	39	7.9%	5	4.1%	3
5 (very good)	4.5%	19	5.6%	16	4.8%	3	0.0%	0
(Don't know)	60.1%	255	54.9%	158	69.8%	44	72.6%	53
Mean:		*2.85*		*2.96*		*2.95*		*2.05*
Base:		424		288		63		73

Personal safety

	Total		Louth		Horncastle		Alford	
1 (very poor)	1.4%	6	1.0%	3	3.2%	2	1.4%	1
2	4.2%	18	5.2%	15	3.2%	2	1.4%	1
3	16.0%	68	16.3%	47	19.0%	12	12.3%	9
4	32.5%	138	34.4%	99	36.5%	23	21.9%	16
5 (very good)	43.2%	183	41.0%	118	31.7%	20	61.6%	45
(Don't know)	2.6%	11	2.1%	6	6.3%	4	1.4%	1
Mean:		*4.15*		*4.11*		*3.97*		*4.43*
Base:		424		288		63		73

Range of shops and services available

	Total		Louth		Horncastle		Alford	
1 (very poor)	5.7%	24	7.6%	22	0.0%	0	2.7%	2
2	9.0%	38	11.1%	32	3.2%	2	5.5%	4
3	24.1%	102	28.5%	82	14.3%	9	15.1%	11
4	33.7%	143	31.3%	90	39.7%	25	38.4%	28
5 (very good)	27.1%	115	21.5%	62	41.3%	26	37.0%	27
(Don't know)	0.5%	2	0.0%	0	1.6%	1	1.4%	1
Mean:		*3.68*		*3.48*		*4.21*		*4.03*
Base:		424		288		63		73

Quality of shops and services available

	Total		Louth		Horncastle		Alford	
1 (very poor)	3.1%	13	3.8%	11	0.0%	0	2.7%	2
2	5.2%	22	6.3%	18	1.6%	1	4.1%	3
3	15.3%	65	17.7%	51	14.3%	9	6.8%	5
4	42.2%	179	43.4%	125	34.9%	22	43.8%	32
5 (very good)	32.5%	138	27.4%	79	47.6%	30	39.7%	29
(Don't know)	1.7%	7	1.4%	4	1.6%	1	2.7%	2
Mean:		*3.98*		*3.86*		*4.31*		*4.17*
Base:		424		288		63		73

Quality / number of places to eat-drink

	Total		Louth		Horncastle		Alford	
1 (very poor)	1.4%	6	2.1%	6	0.0%	0	0.0%	0
2	6.6%	28	6.3%	18	4.8%	3	9.6%	7
3	20.8%	88	22.2%	64	20.6%	13	15.1%	11
4	34.0%	144	34.7%	100	27.0%	17	37.0%	27
5 (very good)	26.4%	112	27.4%	79	23.8%	15	24.7%	18
(Don't know)	10.8%	46	7.3%	21	23.8%	15	13.7%	10
Mean:		*3.87*		*3.85*		*3.92*		*3.89*
Base:		424		288		63		73

General shopping environment

	Total		Louth		Horncastle		Alford	
1 (very poor)	0.9%	4	1.0%	3	0.0%	0	1.4%	1
2	4.0%	17	4.5%	13	1.6%	1	4.1%	3
3	18.6%	79	20.5%	59	19.0%	12	11.0%	8
4	45.5%	193	47.2%	136	47.6%	30	37.0%	27
5 (very good)	29.0%	123	25.0%	72	30.2%	19	43.8%	32
(Don't know)	1.9%	8	1.7%	5	1.6%	1	2.7%	2
Mean:		*4.00*		*3.92*		*4.08*		*4.21*
Base:		424		288		63		73

Size / quality of food supermarket(s)

	Total		Louth		Horncastle		Alford	
1 (very poor)	7.5%	32	10.4%	30	0.0%	0	2.7%	2
2	10.8%	46	11.5%	33	7.9%	5	11.0%	8
3	25.7%	109	25.3%	73	23.8%	15	28.8%	21
4	33.3%	141	34.7%	100	25.4%	16	34.2%	25
5 (very good)	16.5%	70	16.7%	48	14.3%	9	17.8%	13
(Don't know)	6.1%	26	1.4%	4	28.6%	18	5.5%	4
Mean:		*3.43*		*3.36*		*3.64*		*3.57*
Base:		424		288		63		73

Q16 What, if anything would make you visit Louth town centre more often? [MR]
Those who visit Louth at Q13

	Total		Louth		Horncastle		Alford	
Nothing	38.0%	161	30.9%	89	63.5%	40	43.8%	32
Better choice of clothing shops	8.7%	37	11.5%	33	3.2%	2	2.7%	2
Better choice of shops in general	9.7%	41	13.2%	38	0.0%	0	4.1%	3
Better maintenance / cleanliness	1.7%	7	2.4%	7	0.0%	0	0.0%	0
Better quality shops	1.4%	6	1.7%	5	0.0%	0	1.4%	1
Better street market	5.7%	24	6.6%	19	3.2%	2	4.1%	3
Improved bus services	1.4%	6	1.7%	5	1.6%	1	0.0%	0
More car parking	11.6%	49	13.5%	39	6.3%	4	8.2%	6
More food supermarkets	14.6%	62	14.2%	41	9.5%	6	20.5%	15
More large shops	3.8%	16	4.9%	14	1.6%	1	1.4%	1
More traffic free areas / pedestrianisation	7.3%	31	9.7%	28	1.6%	1	2.7%	2
Other	6.8%	29	7.3%	21	7.9%	5	4.1%	3
A petrol station / more petrol stations	2.4%	10	3.1%	9	0.0%	0	1.4%	1
Better / more food places to eat (e,g, fast food)	1.4%	6	2.1%	6	0.0%	0	0.0%	0
Bigger supermarkets / shops (open longer hours)	2.1%	9	1.7%	5	0.0%	0	5.5%	4
Cheaper / free parking	5.4%	23	5.9%	17	3.2%	2	5.5%	4
Improved leisure facilities	1.2%	5	1.0%	3	0.0%	0	2.7%	2
Larger / improved shopping precinct	0.9%	4	1.0%	3	0.0%	0	1.4%	1
Less charity shops	2.1%	9	2.8%	8	1.6%	1	0.0%	0
Less empty shops	0.9%	4	1.4%	4	0.0%	0	0.0%	0
Less traffic congestion	0.9%	4	1.4%	4	0.0%	0	0.0%	0
Stop people parking where they shouldn't (i.e. double yellow lines)	2.1%	9	3.1%	9	0.0%	0	0.0%	0
(Don't know)	2.1%	9	2.1%	6	1.6%	1	2.7%	2
Base:		424		288		63		73

Q17 Would you like a new large food supermarket in Louth?
Those who visit Louth at Q13

	Total		Louth		Horncastle		Alford	
Yes	34.2%	145	36.5%	105	20.6%	13	37.0%	27
No	50.2%	213	47.2%	136	65.1%	41	49.3%	36
Depends where it is located	4.2%	18	5.2%	15	0.0%	0	4.1%	3
Depends who the store operator is	6.6%	28	7.3%	21	1.6%	1	8.2%	6
(Don't Know)	4.5%	19	3.8%	11	12.7%	8	0.0%	0
(Refused)	0.2%	1	0.0%	0	0.0%	0	1.4%	1
Base:		424		288		63		73

Q18 How often do you visit shops, other services or a market in Alford?
Those who visit Alford at Q13

	Total		Louth		Horncastle		Alford	
Everyday	14.1%	14	0.0%	0	0.0%	0	16.9%	14
2-3 times a week	27.3%	27	0.0%	0	0.0%	0	32.5%	27
Once a week	27.3%	27	27.3%	3	40.0%	2	26.5%	22
Once a fortnight	12.1%	12	0.0%	0	0.0%	0	14.5%	12
Once a month	9.1%	9	36.4%	4	20.0%	1	4.8%	4
Less than once a month	8.1%	8	36.4%	4	40.0%	2	2.4%	2
(Don't know / varies)	1.0%	1	0.0%	0	0.0%	0	1.2%	1
(Refused)	1.0%	1	0.0%	0	0.0%	0	1.2%	1
Base:		99		11		5		83

Q19 How would you rate Alford in respect of the following factors, using a scale of 1-5, where 1 is 'very poor' and 5 is 'very good'? [PR]
Those who visit Alford at Q13

Availability of parking

	Total		Louth		Horncastle		Alford	
1 (very poor)	11.1%	11	0.0%	0	0.0%	0	13.3%	11
2	15.2%	15	0.0%	0	20.0%	1	16.9%	14
3	15.2%	15	36.4%	4	0.0%	0	13.3%	11
4	36.4%	36	36.4%	4	0.0%	0	38.6%	32
5 (very good)	17.2%	17	27.3%	3	80.0%	4	12.0%	10
(Don't know)	5.1%	5	0.0%	0	0.0%	0	6.0%	5
Mean:		*3.35*		*3.91*		*4.40*		*3.21*
Base:		99		11		5		83

Parking charges

	Total		Louth		Horncastle		Alford	
1 (very poor)	22.2%	22	0.0%	0	0.0%	0	26.5%	22
2	8.1%	8	0.0%	0	0.0%	0	9.6%	8
3	21.2%	21	27.3%	3	60.0%	3	18.1%	15
4	14.1%	14	9.1%	1	0.0%	0	15.7%	13
5 (very good)	10.1%	10	27.3%	3	20.0%	1	7.2%	6
(Don't know)	24.2%	24	36.4%	4	20.0%	1	22.9%	19
Mean:		*2.76*		*4.00*		*3.50*		*2.58*
Base:		99		11		5		83

Traffic congestion

	Total		Louth		Horncastle		Alford	
1 (very poor)	7.1%	7	0.0%	0	0.0%	0	8.4%	7
2	5.1%	5	0.0%	0	0.0%	0	6.0%	5
3	30.3%	30	27.3%	3	40.0%	2	30.1%	25
4	30.3%	30	36.4%	4	60.0%	3	27.7%	23
5 (very good)	25.3%	25	36.4%	4	0.0%	0	25.3%	21
(Don't know)	2.0%	2	0.0%	0	0.0%	0	2.4%	2
Mean:		*3.63*		*4.09*		*3.60*		*3.57*
Base:		99		11		5		83

	Total		Louth		Horncastle		Alford	
Bus services/facilities								
1 (very poor)	18.2%	18	9.1%	1	0.0%	0	20.5%	17
2	10.1%	10	0.0%	0	0.0%	0	12.0%	10
3	3.0%	3	0.0%	0	0.0%	0	3.6%	3
4	4.0%	4	0.0%	0	0.0%	0	4.8%	4
5 (very good)	1.0%	1	0.0%	0	0.0%	0	1.2%	1
(Don't know)	63.6%	63	90.9%	10	100.0%	5	57.8%	48
Mean:		*1.89*		*1.00*		*0.00*		*1.91*
Base:		99		11		5		83
Personal safety								
1 (very poor)	1.0%	1	0.0%	0	0.0%	0	1.2%	1
2	2.0%	2	0.0%	0	0.0%	0	2.4%	2
3	13.1%	13	18.2%	2	20.0%	1	12.0%	10
4	37.4%	37	36.4%	4	40.0%	2	37.3%	31
5 (very good)	44.4%	44	45.5%	5	40.0%	2	44.6%	37
(Don't know)	2.0%	2	0.0%	0	0.0%	0	2.4%	2
Mean:		*4.25*		*4.27*		*4.20*		*4.25*
Base:		99		11		5		83
Range of shops and services available								
1 (very poor)	22.2%	22	18.2%	2	0.0%	0	24.1%	20
2	32.3%	32	9.1%	1	0.0%	0	37.3%	31
3	30.3%	30	54.5%	6	20.0%	1	27.7%	23
4	7.1%	7	18.2%	2	0.0%	0	6.0%	5
5 (very good)	6.1%	6	0.0%	0	60.0%	3	3.6%	3
(Don't know)	2.0%	2	0.0%	0	20.0%	1	1.2%	1
Mean:		*2.41*		*2.73*		*4.50*		*2.27*
Base:		99		11		5		83
Quality of shops and services available								
1 (very poor)	15.2%	15	9.1%	1	0.0%	0	16.9%	14
2	19.2%	19	9.1%	1	0.0%	0	21.7%	18
3	38.4%	38	63.6%	7	20.0%	1	36.1%	30
4	16.2%	16	0.0%	0	20.0%	1	18.1%	15
5 (very good)	7.1%	7	18.2%	2	40.0%	2	3.6%	3
(Don't know)	4.0%	4	0.0%	0	20.0%	1	3.6%	3
Mean:		*2.80*		*3.09*		*4.25*		*2.69*
Base:		99		11		5		83
Quality / number of places to eat-drink								
1 (very poor)	12.1%	12	9.1%	1	0.0%	0	13.3%	11
2	14.1%	14	9.1%	1	0.0%	0	15.7%	13
3	23.2%	23	27.3%	3	0.0%	0	24.1%	20
4	24.2%	24	27.3%	3	20.0%	1	24.1%	20
5 (very good)	11.1%	11	9.1%	1	40.0%	2	9.6%	8
(Don't know)	15.2%	15	18.2%	2	40.0%	2	13.3%	11
Mean:		*3.10*		*3.22*		*4.67*		*3.01*
Base:		99		11		5		83
General shopping environment								
1 (very poor)	13.1%	13	0.0%	0	0.0%	0	15.7%	13
2	21.2%	21	36.4%	4	0.0%	0	20.5%	17
3	27.3%	27	0.0%	0	40.0%	2	30.1%	25
4	26.3%	26	45.5%	5	20.0%	1	24.1%	20
5 (very good)	10.1%	10	18.2%	2	40.0%	2	7.2%	6
(Don't know)	2.0%	2	0.0%	0	0.0%	0	2.4%	2
Mean:		*2.99*		*3.45*		*4.00*		*2.86*
Base:		99		11		5		83

Size / quality of food supermarket(s)

	Total		Louth		Horncastle		Alford	
1 (very poor)	15.2%	15	0.0%	0	0.0%	0	18.1%	15
2	23.2%	23	36.4%	4	20.0%	1	21.7%	18
3	27.3%	27	0.0%	0	20.0%	1	31.3%	26
4	19.2%	19	36.4%	4	0.0%	0	18.1%	15
5 (very good)	11.1%	11	0.0%	0	60.0%	3	9.6%	8
(Don't know)	4.0%	4	27.3%	3	0.0%	0	1.2%	1
Mean:		*2.87*		*3.00*		*4.00*		*2.79*
Base:		99		11		5		83

Q20 What if anything would make you visit Alford town centre more often? [MR]
Those who visit Alford at Q13

	Total		Louth		Horncastle		Alford	
Nothing	33.3%	33	81.8%	9	100.0%	5	22.9%	19
Better choice of clothing shops	13.1%	13	0.0%	0	0.0%	0	15.7%	13
Better choice of shops in general	27.3%	27	0.0%	0	0.0%	0	32.5%	27
Better maintenance / cleanliness	2.0%	2	0.0%	0	0.0%	0	2.4%	2
Better quality shops	10.1%	10	0.0%	0	0.0%	0	12.0%	10
Better street market	8.1%	8	18.2%	2	0.0%	0	7.2%	6
Improved bus services	1.0%	1	0.0%	0	0.0%	0	1.2%	1
More car parking	3.0%	3	0.0%	0	0.0%	0	3.6%	3
More food supermarkets	11.1%	11	9.1%	1	0.0%	0	12.0%	10
More large shops	1.0%	1	0.0%	0	0.0%	0	1.2%	1
More traffic free areas / pedestrianisation	1.0%	1	0.0%	0	0.0%	0	1.2%	1
Other	11.1%	11	0.0%	0	0.0%	0	13.3%	11
Free parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved roads / less traffic congestion	9.1%	9	0.0%	0	0.0%	0	10.8%	9
Remove the bus stop in the middle of the town	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	6.1%	6	0.0%	0	0.0%	0	7.2%	6
Base:		99		11		5		83

Q21 Would you like a new large food supermarket in Alford?
Those who visit Alford at Q13

	Total		Louth		Horncastle		Alford	
Yes	46.5%	46	18.2%	2	20.0%	1	51.8%	43
No	44.4%	44	54.5%	6	80.0%	4	41.0%	34
Depends where it is located	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Depends who the store operator is	3.0%	3	0.0%	0	0.0%	0	3.6%	3
(Don't Know)	5.1%	5	27.3%	3	0.0%	0	2.4%	2
(Refused)	1.0%	1	0.0%	0	0.0%	0	1.2%	1
Base:		99		11		5		83

Q22 How often do you visit shops and services in Horncastle?
Those who visit Horncastle at Q13

	Total		Louth		Horncastle		Alford	
Everyday	14.2%	26	1.7%	1	24.3%	25	0.0%	0
2-3 times a week	21.9%	40	1.7%	1	37.9%	39	0.0%	0
Once a week	21.3%	39	5.2%	3	32.0%	33	13.6%	3
Once a fortnight	6.0%	11	10.3%	6	1.9%	2	13.6%	3
Once a month	10.4%	19	22.4%	13	1.9%	2	18.2%	4
Less than once a month	25.7%	47	58.6%	34	1.9%	2	50.0%	11
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	0.5%	1	0.0%	0	0.0%	0	4.5%	1
Base:		183		58		103		22

Q23 How would you rate Horncastle in respect of the following factors, using a scale of 1-5, where 1 is 'very poor' and 5 is 'very good'? [PR]
Those who visit Horncastle at Q13

Availability of parking

	Total		Louth		Horncastle		Alford	
1 (very poor)	4.9%	9	5.2%	3	5.8%	6	0.0%	0
2	13.7%	25	12.1%	7	16.5%	17	4.5%	1
3	25.1%	46	34.5%	20	17.5%	18	36.4%	8
4	31.1%	57	37.9%	22	25.2%	26	40.9%	9
5 (very good)	17.5%	32	6.9%	4	25.2%	26	9.1%	2
(Don't know)	7.7%	14	3.4%	2	9.7%	10	9.1%	2
Mean:		*3.46*		*3.30*		*3.53*		*3.60*
Base:		183		58		103		22

Parking charges

	Total		Louth		Horncastle		Alford	
1 (very poor)	6.6%	12	3.4%	2	7.8%	8	9.1%	2
2	10.4%	19	13.8%	8	9.7%	10	4.5%	1
3	27.9%	51	25.9%	15	29.1%	30	27.3%	6
4	24.0%	44	31.0%	18	20.4%	21	22.7%	5
5 (very good)	9.3%	17	8.6%	5	9.7%	10	9.1%	2
(Don't know)	21.9%	40	17.2%	10	23.3%	24	27.3%	6
Mean:		*3.24*		*3.33*		*3.19*		*3.25*
Base:		183		58		103		22

Traffic congestion

	Total		Louth		Horncastle		Alford	
1 (very poor)	11.5%	21	6.9%	4	14.6%	15	9.1%	2
2	13.7%	25	8.6%	5	17.5%	18	9.1%	2
3	31.1%	57	37.9%	22	29.1%	30	22.7%	5
4	26.8%	49	27.6%	16	25.2%	26	31.8%	7
5 (very good)	10.4%	19	8.6%	5	9.7%	10	18.2%	4
(Don't know)	6.6%	12	10.3%	6	3.9%	4	9.1%	2
Mean:		*3.12*		*3.25*		*2.98*		*3.45*
Base:		183		58		103		22

Bus services/facilities

	Total		Louth		Horncastle		Alford	
1 (very poor)	3.8%	7	3.4%	2	4.9%	5	0.0%	0
2	3.3%	6	0.0%	0	4.9%	5	4.5%	1
3	5.5%	10	5.2%	3	5.8%	6	4.5%	1
4	16.4%	30	3.4%	2	27.2%	28	0.0%	0
5 (very good)	10.9%	20	1.7%	1	17.5%	18	4.5%	1
(Don't know)	60.1%	110	86.2%	50	39.8%	41	86.4%	19
Mean:		*3.68*		*3.00*		*3.79*		*3.33*
Base:		183		58		103		22

Personal safety

	Total		Louth		Horncastle		Alford	
1 (very poor)	1.6%	3	1.7%	1	1.9%	2	0.0%	0
2	6.0%	11	8.6%	5	4.9%	5	4.5%	1
3	12.6%	23	5.2%	3	17.5%	18	9.1%	2
4	39.9%	73	53.4%	31	34.0%	35	31.8%	7
5 (very good)	37.2%	68	24.1%	14	41.7%	43	50.0%	11
(Don't know)	2.7%	5	6.9%	4	0.0%	0	4.5%	1
Mean:		*4.08*		*3.96*		*4.09*		*4.33*
Base:		183		58		103		22

Range of shops and services available

	Total		Louth		Horncastle		Alford	
1 (very poor)	4.9%	9	1.7%	1	7.8%	8	0.0%	0
2	17.5%	32	12.1%	7	22.3%	23	9.1%	2
3	34.4%	63	44.8%	26	28.2%	29	36.4%	8
4	31.7%	58	31.0%	18	29.1%	30	45.5%	10
5 (very good)	9.3%	17	5.2%	3	12.6%	13	4.5%	1
(Don't know)	2.2%	4	5.2%	3	0.0%	0	4.5%	1
Mean:		*3.23*		*3.27*		*3.17*		*3.48*
Base:		183		58		103		22

	Total		Louth		Horncastle		Alford	
Quality of shops and services available								
1 (very poor)	0.5%	1	1.7%	1	0.0%	0	0.0%	0
2	10.4%	19	10.3%	6	10.7%	11	9.1%	2
3	32.8%	60	43.1%	25	28.2%	29	27.3%	6
4	40.4%	74	34.5%	20	41.7%	43	50.0%	11
5 (very good)	13.1%	24	3.4%	2	19.4%	20	9.1%	2
(Don't know)	2.7%	5	6.9%	4	0.0%	0	4.5%	1
Mean:		*3.57*		*3.30*		*3.70*		*3.62*
Base:		183		58		103		22
Quality / number of places to eat-drink								
1 (very poor)	1.1%	2	1.7%	1	0.0%	0	4.5%	1
2	12.0%	22	20.7%	12	9.7%	10	0.0%	0
3	19.1%	35	24.1%	14	14.6%	15	27.3%	6
4	32.8%	60	25.9%	15	37.9%	39	27.3%	6
5 (very good)	14.8%	27	1.7%	1	24.3%	25	4.5%	1
(Don't know)	20.2%	37	25.9%	15	13.6%	14	36.4%	8
Mean:		*3.60*		*3.07*		*3.89*		*3.43*
Base:		183		58		103		22
General shopping environment								
1 (very poor)	0.5%	1	0.0%	0	1.0%	1	0.0%	0
2	5.5%	10	6.9%	4	5.8%	6	0.0%	0
3	38.3%	70	48.3%	28	32.0%	33	40.9%	9
4	32.8%	60	34.5%	20	32.0%	33	31.8%	7
5 (very good)	19.1%	35	5.2%	3	27.2%	28	18.2%	4
(Don't know)	3.8%	7	5.2%	3	1.9%	2	9.1%	2
Mean:		*3.67*		*3.40*		*3.80*		*3.75*
Base:		183		58		103		22
Size / quality of food supermarket(s)								
1 (very poor)	3.8%	7	5.2%	3	3.9%	4	0.0%	0
2	16.4%	30	19.0%	11	16.5%	17	9.1%	2
3	36.6%	67	43.1%	25	33.0%	34	36.4%	8
4	25.7%	47	20.7%	12	26.2%	27	36.4%	8
5 (very good)	13.1%	24	3.4%	2	19.4%	20	9.1%	2
(Don't know)	4.4%	8	8.6%	5	1.0%	1	9.1%	2
Mean:		*3.29*		*2.98*		*3.41*		*3.50*
Base:		183		58		103		22

Q24 What if anything would make you visit Horncastle town centre more often? [MR]
Those who visit Horncastle at Q13

	Total		Louth		Horncastle		Alford	
Nothing	48.1%	88	63.8%	37	33.0%	34	77.3%	17
Better choice of clothing shops	10.9%	20	10.3%	6	11.7%	12	9.1%	2
Better choice of shops in general	15.8%	29	12.1%	7	18.4%	19	13.6%	3
Better maintenance / cleanliness	0.5%	1	0.0%	0	1.0%	1	0.0%	0
Better quality shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved bus services	2.2%	4	3.4%	2	1.9%	2	0.0%	0
More car parking	2.2%	4	0.0%	0	3.9%	4	0.0%	0
More food supermarkets	12.6%	23	8.6%	5	16.5%	17	4.5%	1
More large shops	2.2%	4	1.7%	1	2.9%	3	0.0%	0
More traffic free areas / pedestrianisation	2.7%	5	3.4%	2	2.9%	3	0.0%	0
Other	9.8%	18	5.2%	3	14.6%	15	0.0%	0
Cheaper / free parking	4.4%	8	1.7%	1	6.8%	7	0.0%	0
Improved market	4.4%	8	0.0%	0	7.8%	8	0.0%	0
Bigger Tesco	3.3%	6	3.4%	2	3.9%	4	0.0%	0
(Don't know)	1.6%	3	1.7%	1	1.0%	1	4.5%	1
Base:		183		58		103		22

Q25 Would you like a new large food supermarket in Horncastle?
Those who visit Horncastle at Q13

	Total %	Total	Louth %	Louth	Horncastle %	Horncastle	Alford %	Alford
Yes	32.2%	59	19.0%	11	40.8%	42	27.3%	6
No	54.6%	100	69.0%	40	45.6%	47	59.1%	13
Depends where it is located	2.7%	5	0.0%	0	4.9%	5	0.0%	0
Depends who the store operator is	2.2%	4	0.0%	0	3.9%	4	0.0%	0
(Don't Know)	8.2%	15	12.1%	7	4.9%	5	13.6%	3
(Refused)	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Base:		183		58		103		22

GEN Gender:

	Total %	Total	Louth %	Louth	Horncastle %	Horncastle	Alford %	Alford
Male	31.2%	157	31.8%	93	29.7%	33	31.0%	31
Female	68.8%	346	68.2%	199	70.3%	78	69.0%	69
Base:		503		292		111		100

AGE Can I ask, how old are you ?

	Total %	Total	Louth %	Louth	Horncastle %	Horncastle	Alford %	Alford
18-24	0.6%	3	0.3%	1	0.0%	0	2.0%	2
25-34	2.2%	11	1.7%	5	3.6%	4	2.0%	2
35-44	11.5%	58	13.4%	39	9.0%	10	9.0%	9
45-54	24.7%	124	26.7%	78	21.6%	24	22.0%	22
55-64	19.1%	96	16.8%	49	18.9%	21	26.0%	26
65+	40.6%	204	39.7%	116	46.8%	52	36.0%	36
(Refused)	1.4%	7	1.4%	4	0.0%	0	3.0%	3
Base:		503		292		111		100

PEO Including yourself, how many people are their in your household?

	Total %	Total	Louth %	Louth	Horncastle %	Horncastle	Alford %	Alford
One	19.7%	99	20.5%	60	18.9%	21	18.0%	18
Two	48.3%	243	48.6%	142	51.4%	57	44.0%	44
Three	14.5%	73	14.0%	41	14.4%	16	16.0%	16
Four	12.1%	61	11.3%	33	9.0%	10	18.0%	18
Five	3.0%	15	3.1%	9	4.5%	5	1.0%	1
Six	0.8%	4	1.0%	3	0.0%	0	1.0%	1
More than six	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	1.6%	8	1.4%	4	1.8%	2	2.0%	2
Base:		503		292		111		100

ETH What would best describe your ethnic origin (according to the census)?

	Total %	Total	Louth %	Louth	Horncastle %	Horncastle	Alford %	Alford
White – British	98.0%	493	97.3%	284	98.2%	109	100.0%	100
White - Irish	0.4%	2	0.3%	1	0.9%	1	0.0%	0
Any other white background	0.4%	2	0.7%	2	0.0%	0	0.0%	0
Black - Caribbean	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Black - African	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Black - Any other black background	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mixed - White and black	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mixed - Caribbean	0.0%	0	0.0%	0	0.0%	0	0.0%	0
White - White and black African	0.0%	0	0.0%	0	0.0%	0	0.0%	0
White - White and Asian	0.0%	0	0.0%	0	0.0%	0	0.0%	0
White - Any other mixed background	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asian - Chinese	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asian - Indian	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asian - Pakistani	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asian - Bangladeshi	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asian - Any other Asian background	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gypsy	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Any other ethnic background	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	1.2%	6	1.7%	5	0.9%	1	0.0%	0
Base:		503		292		111		100

QUOTA Area

	Total		Louth		Horncastle		Alford	
Louth	58.1%	292	100.0%	292	0.0%	0	0.0%	0
Horncastle	22.1%	111	0.0%	0	100.0%	111	0.0%	0
Alford	19.9%	100	0.0%	0	0.0%	0	100.0%	100
Base:		503		292		111		100

Column %ges.

Appendix 6 Business Survey Results

Business Occupier Survey

Business Occupier Perceptions

A random survey of business occupiers within the study area was undertaken in May 2012. In total 101 businesses were interviewed in East Lindsey; 50 in Louth; 31 in Horncastle; and 20 in Alford to reflect the relative proportion of businesses in the three towns.

The occupiers were asked to give their views on a number of issues, including:

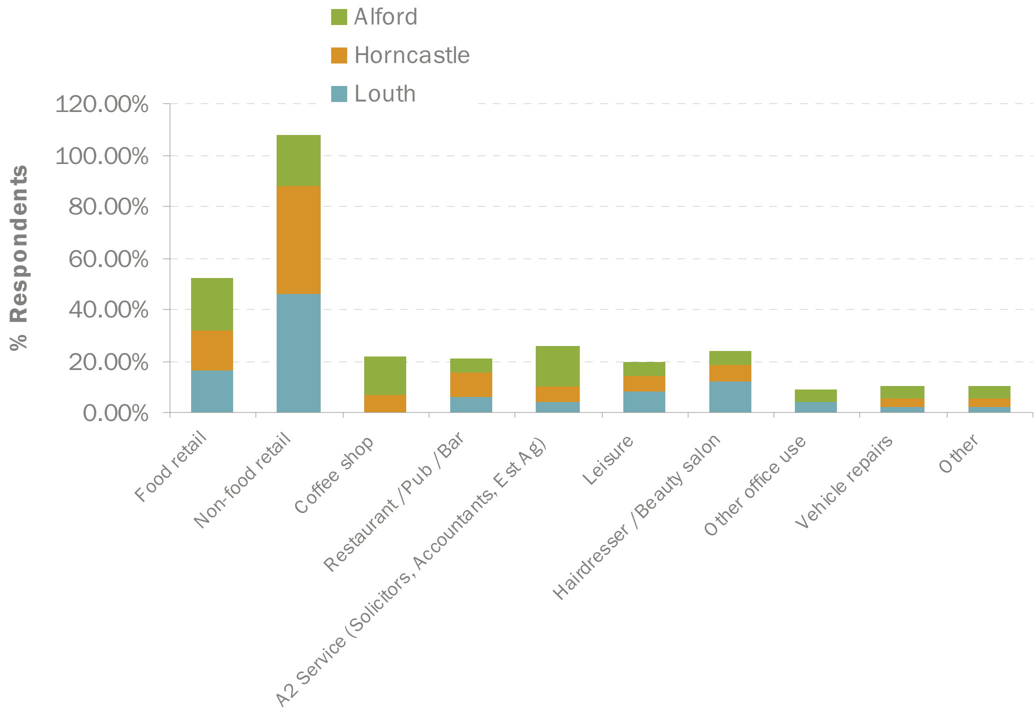
- Nature of the business (legal status; type and size; tenure of business premises; length of operation);
- future plans (relocation, extension, re-fits or closure);
- views on current and likely future business performance;
- local benefits and constraints affecting business performance;
- views on the strengths/weaknesses of the town as a place for work and business; and
- views on foodstore provision within the various centres and the need for further foodstore provision.

The remainder of this section analyses the responses received.

Type of Business

Figure 6.1 shows the range and type of businesses that responded to the survey across the three towns. The vast majority (56.44%) of respondents throughout the study area operate retail businesses, both food and non-food. Other predominant uses in the towns include retail and financial services with a very limited proportion of office workers. A similar proportion of business uses are spread across the three towns.

Figure 6.1 Type of Business



Length of Trading in Current Location

Table 6.1 shows the length of trading of the businesses surveyed in each of the towns. The majority of businesses have been trading in the centres for over ten years (61.4% across the three town as a whole), with the average length of time 23.3 years, indicating that there are a significant proportion of well established businesses in the District and is typical of long established and historic market towns shopping centres across the country.

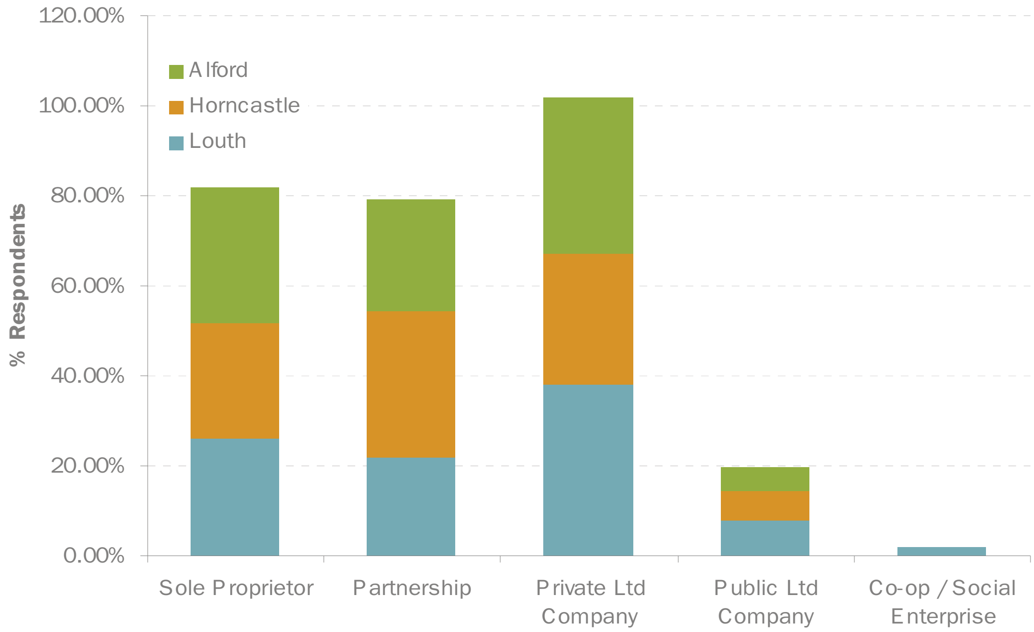
Table 6.1: Length of Trading in Centre

Length of Trading	Louth		Horncastle		Alford	
	No.	%	No.	%	No.	%
Less than 1 year	2	4.00%	1	3.23%	1	5.00%
1 – 5 years	11	22.00%	2	6.45%	4	20.00%
6 – 10 years	10	20.00%	5	16.13%	3	15.00%
More than 10 years	14	28.00%	10	32.26%	5	25.00%
More than 25 years	9	18.00%	10	32.26%	3	15.00%
More than 50 years	4	8.00%	3	9.68%	4	20.00%
Total	**50**	**100.00%**	**31**	**100.01%**	**20**	**100.00%**

Legal Status, Size and Tenure of Businesses

The legal status of the businesses surveyed is summarised in Figure 6.2. The highest proportion of occupiers was private limited companies (34.7%), with 25.7% partnerships and 26.7% sole proprietorships.

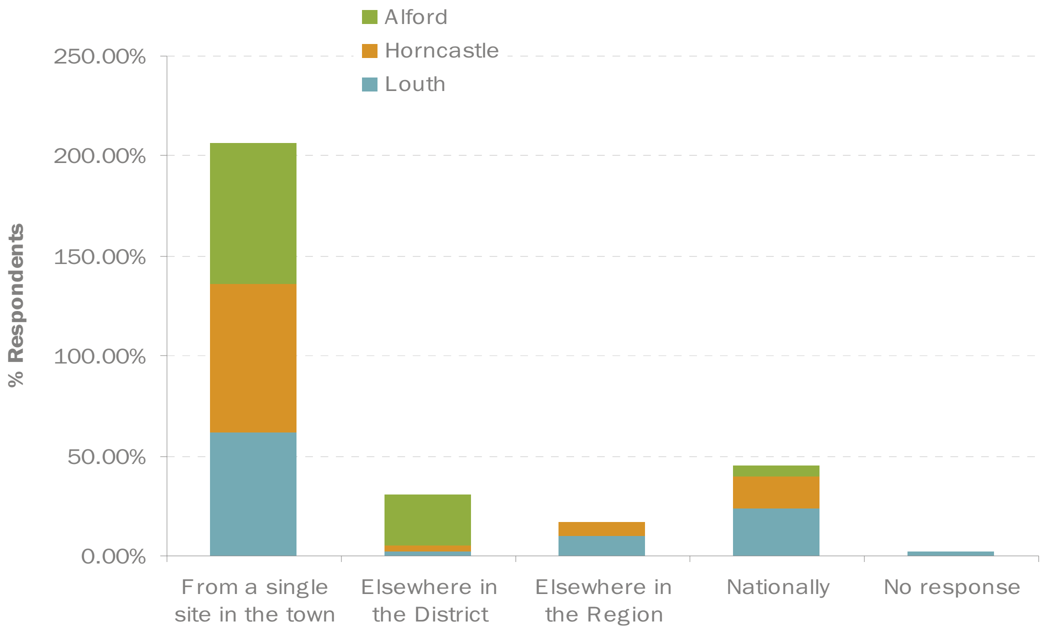
Figure 6.2: Legal Status



As indicated by Figure 6.3, the majority of businesses (67.3%) operate from a single outlet, with much smaller proportions also operating elsewhere in the District and/or region. Louth demonstrates the greatest proportion of national multiple retailers. Alford has a much smaller proportion of national multiples as an indication of the lower levels of demand within the centre.

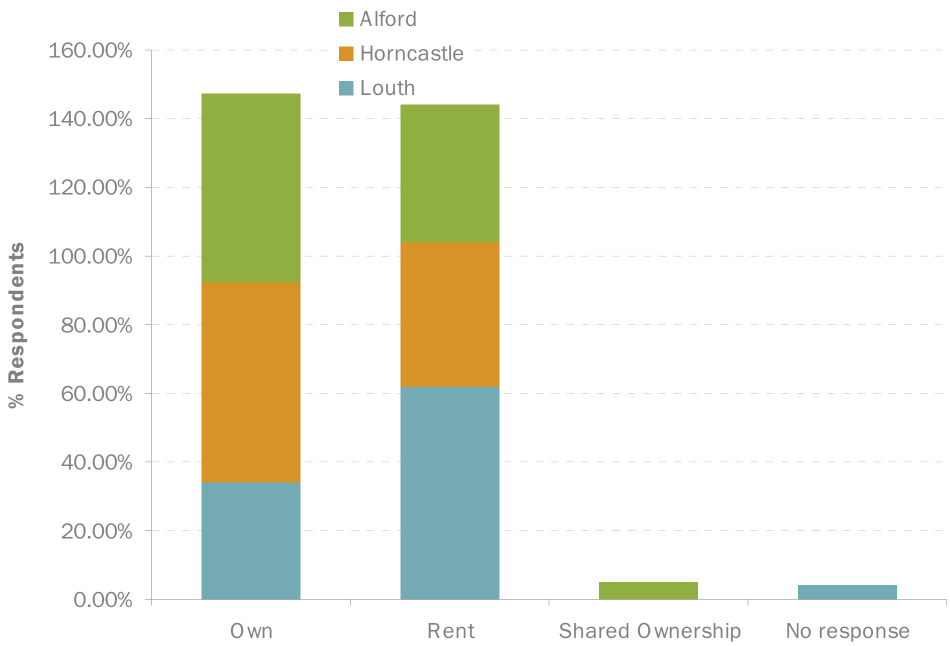
Figure 6.4 indicates that very similar proportion of business across the study area who own their premises (45.55%) and those who choose to rent (51.49%). Levels of ownership in Alford and Horncastle are higher than Louth, which reflects the higher proportion of small independent traders who own their own shop premises.

Figure 6.3 Size of Business



Tenure of Business Premises

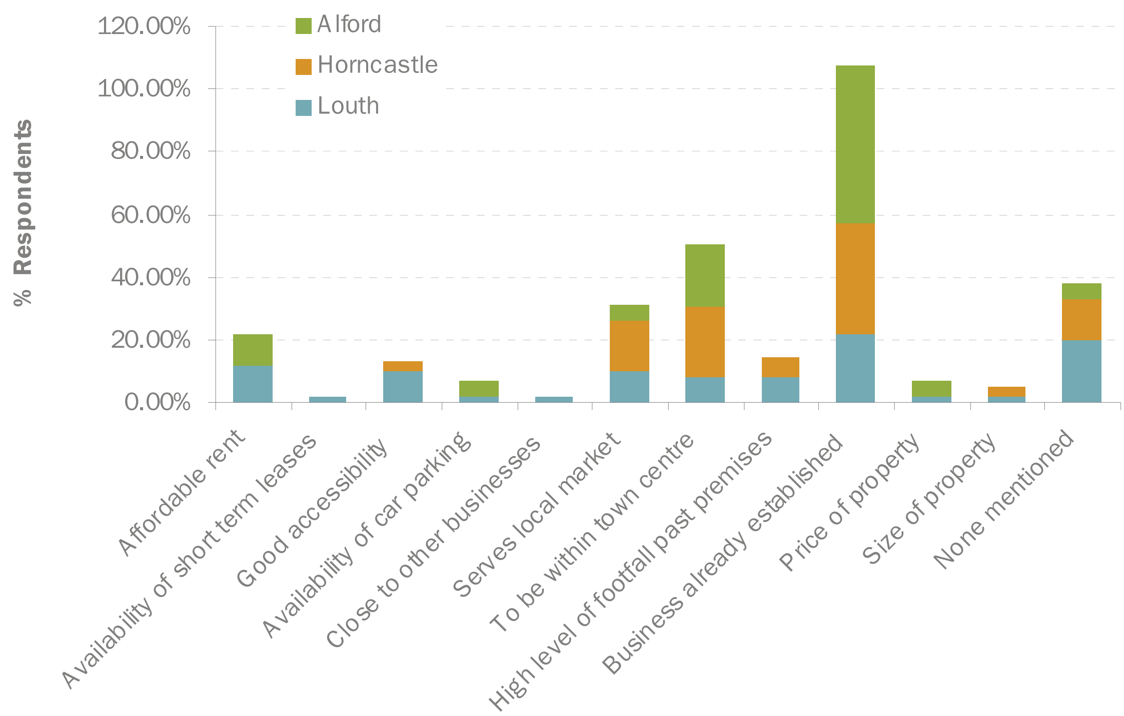
Figure 6.4: Tenure of Business Premises



Reasons for Locating in the Area

Businesses were asked what their reasons were for locating in the area. Figure 6.5 summarises the main reason given:

Figure 6.5: Main reason for location choice



1.2 This indicates a range of reasons why individual businesses chose to locate within the different towns. Other than those businesses already established (i.e. where the original reason for locating in the town was unknown), key locational factors include the ability to serve local markets, along with affordable rent and good accessibility. A location within the town centre with high level of footfall is also key determining factors.

Future Property Requirements

Businesses were asked what current plans, if any, they had to change their business premises. The majority of occupiers in all three centres appeared to be content with their existing premises, with between 78.0% and 90.0% across the centres having no plans to change. These results suggest that most occupiers are committed to remain in the centres. A number of businesses in Louth (18.0%), Horncastle (9.68%) and Alford (5.0%) were looking to re-fit, extend or improve their existing properties to meet their requirements, which further suggests commitment to invest and stay in the local area. Some businesses suggested they are looking to relocate to new premises in the local area (two businesses in Louth and one in Horncastle). No respondents indicated plans to close or relocate from the local area as a further positive indication of a commitment to stay in the local area.

Trading Performance

Businesses were asked to describe their current trading performance and performance over the last 12 months, as shown in Table 6.2. A scoring system of 1 point for 'improved' trading, 0 points for 'stay the same' and -1 point for a 'decline' in trading is used to calculate an average. The strongest trading centre appears to be Horncastle, with business trading performances indicating a slight improvement and achieving an average score of 0.16. Businesses within Louth and Alford reported a decline in business performance over the last 12 months to receive negative scores of -0.32 and -0.22 respectively. Louth received the lowest average score overall.

Table 6.2: Last 12 Month Trading Period

Centre	Performance (% Respondents in Each Centre)				Average Score (1 to -1)
	Improved (1)	Stayed same (0)	Declined (-1)	Don't Know / Refused	
Louth	12.0	40.0	42.0	6.0	**-0.32**
Horncastle	38.7	38.7	22.58	0.0	**0.16**
Alford	15.0	40.0	35.0	10.0	**-0.22**

(Average score based on 1 for improved, 0 for stay the same and -1 for declined)

The high proportion of respondents stating that trading had declined over the last 12 months in all centres is to be expected due to the recession.

Opinions on expected future trading performance are summarised in Table 6.3. Overall, more respondents (38.61%) believed that trading would improve over the next 12 months. Business in Louth and Horncastle are more optimistic about future performance than businesses in Alford where the majority of business expected trading to stay the same, and equal numbers expected performance to improve and decline.

Table 6.3: Expected 12 Month Future Trading Period

Centre	Performance (% Respondents in Each Centre)				Average Score (1 to -1)
	Improve (1)	Stay same (0)	Decline (-1)	Don't Know / Refused	
Louth	42.0	36.0	14.0	8.0	**0.3**
Horncastle	41.9	38.7	12.9	6.5	**0.31**
Alford	25.0	30.0	25.0	20.0	**0.0**

(Average score based on 1 for improve, 0 for stay the same and -1 for decline)

Performance of Centres

Businesses were also asked whether, in general, they considered that individual centres (i.e. Louth, Horncastle and Alford) had improved, stayed the same or declined over the last year. All of the centres achieved a negative score, with more businesses stating that they considered that centres declined than improved over the last year. The strongest trading centre appears to be

Horncastle, with a score of -0.03, while the lowest scoring centre was Alford with a score of -0.5.

Table 6.4: Performance of Centres over last 12 months

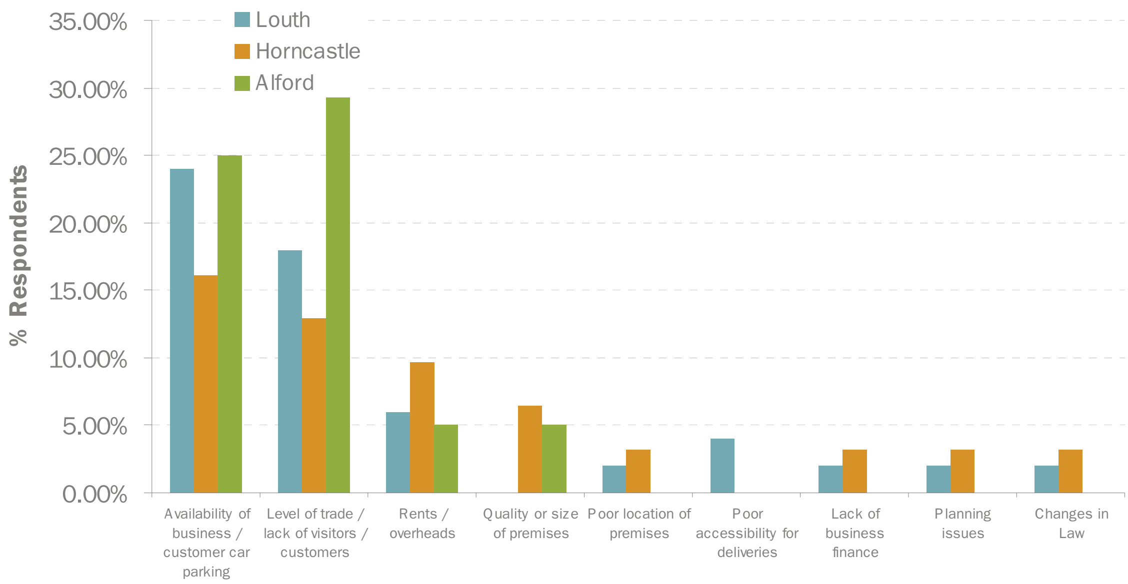
Centre	Performance (% Respondents in Each Centre)				Average Score (1 to -1)
	Improved (1)	Stayed same (0)	Declined (-1)	Don't Know / Refused	
Louth	8.0	60.0	32.0	0	**-0.24**
Horncastle	22.58	51.6	25.8	0.0	**-0.03**
Alford	10.0	25.0	55.0	10.0	**-0.5**

(Average score based on 1 for improved, 0 for stay the same and -1 for declined)

Factors Constraining Businesses

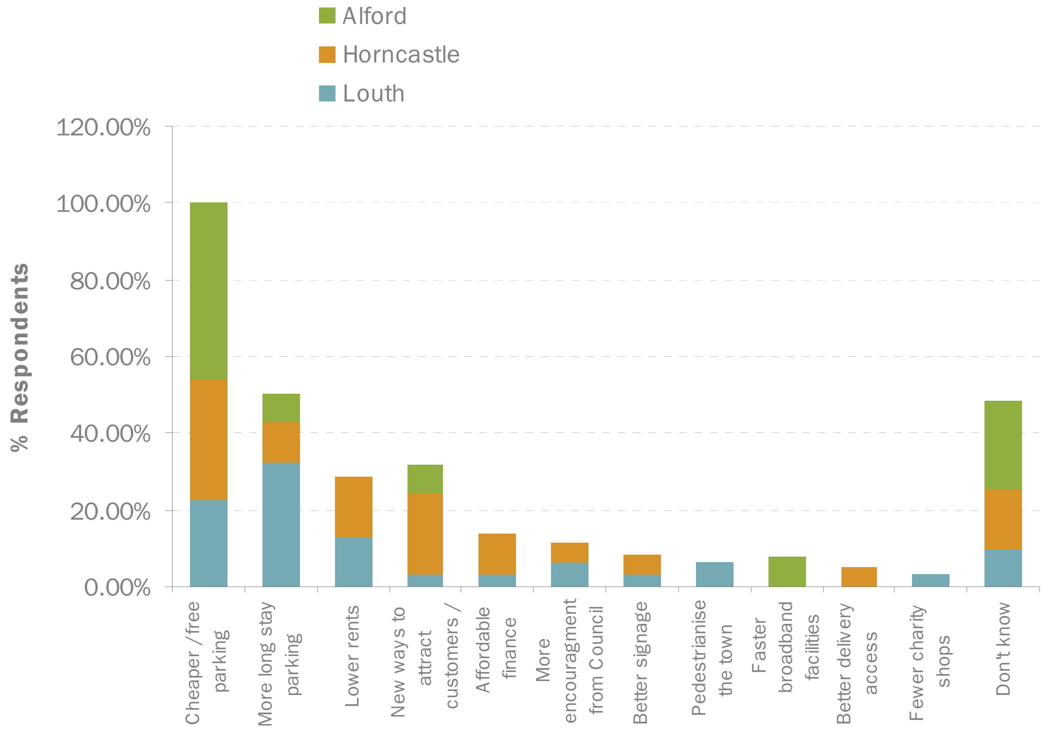
Businesses in each of the three towns were asked the most important issues believed to constrain their operation and performance. In general the most popular responses were the level of trade/lack of visitors/customers (18.8%) and the availability of business and customer car parking (21.8 %). The lack of trade and custom was a particular issue in Alford, with 30.0% of respondents identifying this as a constraining factor. Other notable factors included rents and overheads (6.9%) and the quality and size of premises (3.0%). Poor accessibility for deliveries was a particular problem in Louth. A high proportion of respondents in each of the three towns could not point to specific constraining factor.

Figure 6.6: Most Important factors constraining businesses



Businesses were asked how the most important constraining issues could be addressed (Figure 6.7). The most popular response overall was the provision of cheaper or free car parking (30.16%), followed by more long stay car parking spaces (20.64%), new ways to attract customers and people to the towns and lower rents (11.11%). Other potential solutions included improved availability of finance and an end to the recession; better access for deliveries; fewer charity shops on the high street; better signage and more encouragement from the Council. Faster broadband; a reduction in beer duty; better recycling facilities; and redevelopment of the Alford bus station were also mentioned by respondents as potential initiatives to improve existing business constraints.

Figure 6.7   Means to address constraints on businesses



Businesses were also asked about the second most important factors which constrained their business. Again, the highest scoring factors were the availability of business and customer car parking (11.11%). The poor location of premises and pedestrianisation of the town centre were identified as constraining factors in Louth and Alford. A considerable proportion of respondents (59.0% in total) could not identify a second significant constraint on their business.

When asked how the second most important constraining issues could be addressed, responses included, inter alia, increased and cheaper car parking; relocation to new business premises within the town; pedestrianisation; better public transport better delivery access, lower rents and financial incentives associated with a better economic climate.

Aspects of Centres Benefiting Businesses

Occupiers were asked if a number of aspects within the centres benefited their business. Table 6.5 shows the percentage of responses for the centres that believed the aspect did benefit the business.

In general, over 50% of businesses felt that the majority of the aspects listed benefited their business in each of the three towns. 90.0% or more felt that local demand for their product/service was a significant benefit to their business, closely followed by the ease with which customers and employees could get into the centre. The variety of shops and the presence of other businesses within the town were also considered to be of significant benefit, particularly in Louth and Horncastle. 'Room to expand' and 'Affordable premises to buy for expansion' were the aspects considered to least benefit businesses across the District.

Table 6.5: Aspects of centres which benefit existing businesses

Aspect	% Respondents		
	Louth	Horncastle	Alford
Room to expand	40.0	32.3	30.0
Good road network	68.0	67.7	55.0
Availability of car parking	70.0	51.6	55.0
Employees live in area	70.0	74.2	80.0
Good bus service	60.0	74.2	45.0
Easy for employees to get to	72.0	77.4	80.0
Easy for customers to get to	96.0	93.6	80.0
Local demand for product/service	98.0	93.6	95.0
Affordable premises to buy for expansion	38.0	41.9	30.0
Presence of other businesses	80.0	80.7	55.0
Affordable rents/rates	72.0	38.8	70.0
The variety of shops	88.0	74.2	60.0
Other	0.0	0.0	0.0

Rating of Centres.

Occupiers were asked how they rated the centres against a number of aspects (Table 6.6). A scoring system of 2 points for 'very good', 1 point for 'quite good', 0 points for 'neither good nor poor', -1 point for 'quite poor' and -2 points for 'very poor' is used to calculate an average.

In general, all aspects within each of the centres were considered to be between 'quite poor' and 'quite good' (between -1 and 1), with no aspects scoring below -1 or above 1.

Table 6.6 Rating of Centres

Aspect	Louth	Horncastle	Alford
Rents / rates	**-0.32**	**0.62**	**0.26**
Availability of business / customer parking	**-0.84**	**0.03**	**-0.53**
Traffic circulation	**-0.49**	**-0.19**	**0.26**
Safety during the daytime	**0.6**	**0.65**	**0.74**
Safety during the evenings and at night	**0.6**	**0.48**	**0.65**
Crime and security	**0.53**	**0.53**	**0.79**
Range of shops and services available	**0.66**	**0.58**	**-0.22**
Quality of shops and services available	**0.88**	**0.71**	**-0.16**
Leisure & entertainment facilities	**0.36**	**-0.23**	**-0.83**
Street furniture and landscaping	**-0.02**	**0.1**	**0.21**
Liveliness / street life / character	**0.41**	**0.32**	**-0.26**
Level of street cleansing and litter	**0.46**	**0.29**	**0.72**
Town centre management and maintenance	**0.02**	**0.33**	**0.29**
Condition/appearance of older buildings	**0.35**	**0.5**	**0**
General shopping environment	**0.56**	**0.8**	**0.11**
Interest shown by the Council / local authorities	**-0.37**	**-0.08**	**-0.35**
Marketing / promotion	**-0.28**	**-0.54**	**-0.8**
Interest shown by landlord owners	**-0.41**	**-0.17**	**0.44**
The way businesses work together	**0.3**	**0.38**	**0.22**
The quality of parks and open spaces	**0.8**	**0.37**	**0.76**
Town centre events	**0.44**	**0.19**	**-0.11**
Average Score	**0.20**	**0.27**	**0.10**

Based on a scoring system of -2 for Very Poor; -1 Quite Poor; 0 Neutral; 1 Quite Good and 2 for Very Good
Green *= Good to Very Good (0.5 to 2);* ***Black*** *= Neutral (-0.5 to 0.5);* ***Red*** *= Poor to Very Poor (-0.5 to -2)*

Aspects which scored as poor (below -0.5) included the availability of business and customer car parking (Louth and Alford), leisure and entertainment provision in Alford, and marketing and promotional activities in Alford and Horncastle.

A number of factors scored above 0.5 (quite good) including rents and rates (Horncastle); safety during the daytime and crime and security in all centres;

safety during the evenings and at night (Louth and Alford); the general shopping environment and the range and quality of shops and services available (Louth and Horncastle); litter and street cleaning (Alford); and the condition/appearance of older buildings in Alford. The quality of parks and open space was recognised as quite good in Alford and Louth.

The overall average score for the centres was closest to 'Neutral', with Horncastle having the highest average score of 0.27 and Alford having the lowest score of 0.10.

Measures to Help Businesses

Occupiers were asked to rate a set of measures in terms of how they would be perceived to help their businesses (Table 6.7). A scoring system of 5 points for 'a lot' of help to 1 point for 'a little' help is used to calculate an average. All of the centres gave the measures an average score of 3 or more equating to a 'Neutral' impact on improving businesses in the towns.

Table 6.7 Measures to help businesses

Measure	Louth	Horncastle	Alford
Streetscape improvements (e.g. paving, street furniture, signage)	**3.21**	**2.9**	**2.72**
Street cleaning and environmental services	**3.51**	**3.76**	**2.94**
Shop front improvements	**3.55**	**3.63**	**3.33**
Security measures such as CCTV and policing	**3.36**	**3.7**	**3.33**
Pedestrianisation	**2.83**	**2.62**	**2.29**
Better arrangements for receiving deliveries	**3.41**	**3.4**	**2.53**
Improved customer parking	**4.43**	**3.9**	**3.78**
Events and special promotions	**4.06**	**3.6**	**3.39**
Better marketing & promotion of the centre in general	**4.3**	**4.2**	**3.72**
An effective town centre forum where businesses can be heard	**4.07**	**3.67**	**3.33**
Business support/advice	**3.41**	**3.33**	**3.17**
Assistance in the recruitment & retention of staff	**2.44**	**2.48**	**2.72**
Provision of additional shops and services	**3.53**	**3.83**	**3.61**
Average Score	**3.55**	**3.46**	**3.14**

Based on a scoring system of a scale of 1 -5, where 1 is 'a little' and 5 is 'a lot'. ***Green*** *= Quite a lot of help (above 4),* ***Black*** *= Neutral (between 3 and 4),* ***Red*** *= Neither a lot nor a little help (below 3)*

The measure rated most likely to help businesses was improved customer parking with a score of 4.43% in Louth, closely followed by better marketing and promotion of the centre in general, considered likely to be 'quite a lot' of help in Louth and Horncastle. Louth also identified a more effective town centre forum to enable businesses to be heard and the introduction of events and special promotions with scores greater then 4.0.

The measure rated least likely to help businesses was assistance in the recruitment and retention of staff, closely followed by pedestrianisation which scored below 3.0 in all of the three towns. Streetscape improvements were considered to be of little help in Horncastle and Alford, whilst improved street cleaning and environmental initiatives and better arrangements for deliveries would have a limited benefit to businesses in Alford.

Shopping in the Centres

Table 6.8 summarises occupiers' opinions on the town centre in shopping terms. The highest proportion of respondents in Louth (52.2%) and Horncastle (60.0%) felt that the centres were too down market. An equal proportion of occupiers in Alford considered that the centre was fine as it is and too down market. None of the respondents considered that the centres where too up market.

Table 6.8: Opinions on Centres in Shopping Terms

Centre	% Respondents			
	Top up market	Fine as it is	Too down market	Don't know
Louth	0.0	43.5	52.2	4.3
Horncastle	0.0	35.0	60.0	5.0
Alford	0.0	47.6	47.6	4.8

Table 6.9: Opinions on Current Shopping and Service Mix

Centre	% Respondents			
	Not enough large chain stores	The right mix between large and small stores	Not enough independent shops	Don't know
Louth	40.0	36.0	14.0	10.0
Horncastle	29.0	32.3	32.3	6.5
Alford	15.0	30.0	40.0	15.0
Alford	23.8	4.8	66.7	4.8

Occupiers' opinions on the town centres' shopping and service mix can be seen in Table 6.9. The majority of occupiers in Louth considered that there were insufficient large chain stores, whilst the majority of respondents in Alford considered that there were not enough small, independent shops. An equal proportion of respondents in Horncastle considered the town to have the right mix of small and large stores, and insufficient independent shops.

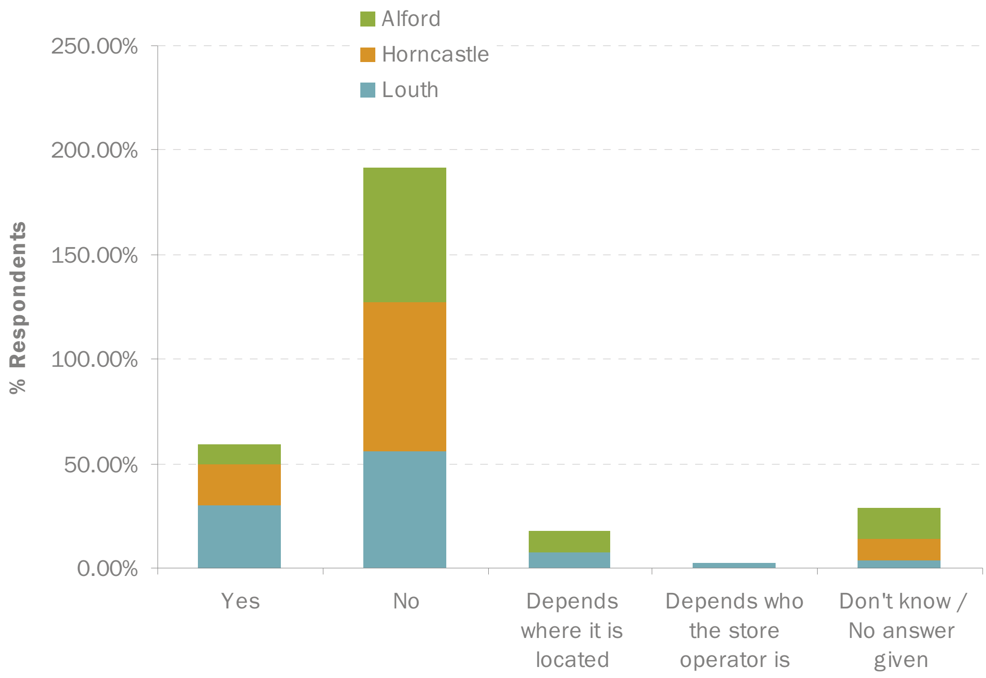
Occupiers were also asked about the proportion of food and non-food shopping within each of the towns, the results of which are shown in Table 6.10. The highest proportion of respondents in all centres considered there to be the right balance between food and non-food shopping. The only centre where a notable proportion of respondents (26%) considered there to be insufficient provision for main food shopping was in Louth, albeit only a slightly lower proportion (22%) considered there to be too much food shopping in the town.

Table 6.10: Opinions on Food and Non-Food Mix

Centre	% Respondents			
	Not enough provision for main food shopping	The right mix between food and non-food shopping	Too much food shopping	Don't know
Louth	26.0	46.0	22.0	6.0
Horncastle	9.7	74.2	16.1	0.0
Alford	5.0	65.0	20.0	10.0

A specific question was asked in relation to whether existing businesses within each of the towns wanted to see a new large scale supermarket development. As reflected in Figure 6.8, the majority of respondents (62.4%) did not support a new supermarket development. The biggest objection was by occupiers in Horncastle (71.0%) followed by Louth (56%) and then Alford (65%). 22.8% of respondents overall voiced their support for a new supermarket development, the majority of support from respondents in Louth (30.0%), and 6.93% of respondents considered that it would depend on the location and store operator.

Figure 6.8 Support for new supermarket development



Those respondents who indicated support for a new supermarket were then asked where they would like to see this located. The following responses were received in order of preference for each of the centres:

Louth:

- Fairfield Industrial Estate (35.0%)
- Close to the existing Co-op (15.0%)
- Cattle market site (10.0%)
- Centre of Louth (10.0%)
- New Market (10.0%)
- Nowhere in particular / Don't know (20.0%)

Horncastle

- Boston Road (33.3%)
- Outskirts of Horncastle – unspecified (33.3%)
- Existing Tesco, Horncastle (33.3%)

Alford

- Middle of West Street (50%)
- Centre of Alford (25%)
- Nowhere in particular / Don't know (25%)

Appendix 7 Site Evaluation

SITE L1: Louth Cattle Market, Upgate/Newmarket, Louth

This site comprises the existing cattle market site on the edge of Louth Town Centre. The site also includes former industrial uses (now closed), garage units and access, as well as an area of unused land, and the Council owned car park fronting onto Newmarket. The cattle market site itself occupies an area of 2.2 ha, with potential expansion land (incorporating the former industrial land, garages and open space to the west) totals an additional 0.6 ha. The Boars Head public house and adjacent dwellings are excluded. The site is outside the town centre boundary but within 300m of the protected retail streets. The site therefore comprises an edge of centre site in retail terms. The current use of the site represents an inefficient use of land, with the potential to relocate the cattle market to a less central location outside the town. The site is unallocated in the East Lindsey Adopted Local Plan (1995) and lies outside the Louth town centre conservation area.

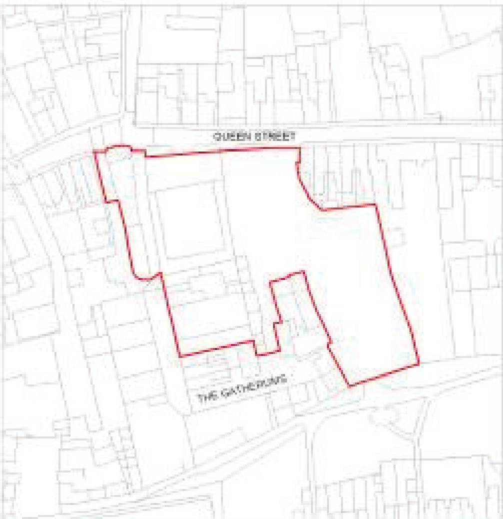
Evaluation Criteria	Comment
Availability	Short to medium term.
Scale of Development	Large scale: 5,000 sqm plus, alongside adequate surface car parking.
Commercial Potential	Visible site edge of centre on the approach to Louth with existing links to shopping streets. Retail frontage to Newmarket. The main site is in single ownership. The wider site would require land assembly. The cattle market facility would likely need to be relocated on an alternative site. Residential garages off Newmarket Street would also need to be acquired and potentially re-provided.
Development Constraints	Edge of centre retail development will need to be justified in accordance with the NPPF. No other allocations/major planning constraints.
Possible Alternative Uses	Retail warehouse or residential uses. Commercial development (office, warehousing etc) unlikely to be viable.
Access	Existing access from Upgate and Newmarket, depending on incorporation of existing car park.
Overall Development Prospects	**GOOD**

SITE L2: ELDC Car Park/Co-op, Kiln Lane, Louth

This site includes the ELDC car park, adjacent industrial and agricultural units and open space. It is on the edge of the town centre boundary and about 200m from protected shopping streets and is therefore edge of centre site in planning terms. The site could be extended to include the Co-op supermarket to the south. The site without Co-op measures 1.3 ha. The site is allocated as a car park (Policy TR4) and an Action Area Redevelopment Site (Policy ENV13) in the East Lindsey Adopted Local Plan (1995). The majority of the site appears to be located in flood zone 2. Planning permission for foodstore development (3,759 sqm gross) on the site was refused in 2009. Part of the site is currently subject to a planning application for residential development (Ref 706/12).

Evaluation Criteria	Comment
Availability	Medium term.
Scale of Development	Medium scale: up 4,000 sq.m gross. Alternatively the Co-op store could be redeveloped and extended by up to 2,000 sq.m gross if it is relocated to the ELDC car park.
Commercial Potential	The site is understood to be within at least three different ownerships, requiring site assembly. No retail frontage/very limited visibility, but with established links to primary shopping and commercial streets. Adequate customer and service access likely to be a problem. The site is located within Flood Zones 2 and 3. The Co-op site is too constrained in terms of size and configuration to accommodate an extension to the store.
Development Constraints	The site is in multiple ownership, requiring acquisition and possible relocation of existing industrial/commercial buildings. Potential impact on residential amenity will need to be addressed. Edge of centre retail development will need to be justified in accordance with the NPPF. Loss of car parking spaces and potential implications for highways safety. Development within a flood risk will need to be justified. Potential impact on protected species (bats). Design will need to be sympathetic to minimise impact on the conservation area.
Possible Alternative Uses	Current planning permission for residential development.
Access	Existing access from Northgate via Kiln Lane and potential access off Eve Street/Charles Street, but access appears relatively constrained.
Overall Development Prospects	**POOR**

SITE L3: Queen Street Car Park, Louth

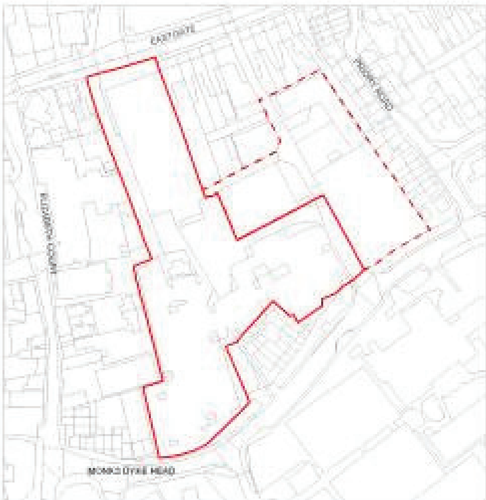


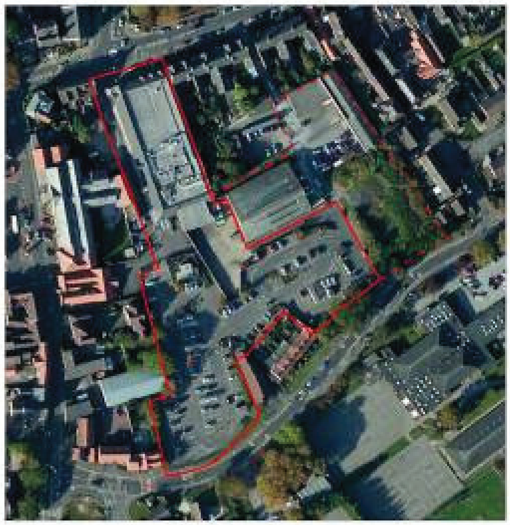
This site comprises the Queen Street car park and adjacent industrial buildings, and occupies an area of 0.5 ha. The site could be developed in conjunction with additional industrial and commercial buildings, as well as the additional car park off Kidgate, although site topography and multiple ownership are likely to preclude this. The site is within the town centre boundary and within 100m from primary shopping streets. The site lies within the Louth Conservation Area and was allocated as a car park (Policy TR4) and an Action Area Redevelopment Site (Policy ENV13) in the East Lindsey Adopted Local Plan (1995). The site has extant planning permission for a foodstore of 1,579 sqm and three smaller retail units granted on appeal in March 2011 (Ref N/105/03627/08).

Evaluation Criteria	Comment
Availability	Medium term.
Scale of Development	Small scale: about 2,000 sq.m gross.
Commercial Potential	Existing planning permission for a food store of 1,579 sq m. Adequate site frontage and linkages to primary shopping streets. The site is in multiple ownership and would require assembly. Site levels and ownership may preclude development.
Development Constraints	Edge of centre retail development well connected to the primary shopping area and principle of retail development is established. Loss of car parking and implications for highway safety would need to be considered. Impact on the conservation area and the potential for noise and disturbance to local residents would need to be considered as part of the design.
Possible Alternative Uses	Smaller scale retail development (food and non-food) – as per existing planning permission
Access	Existing access from Queen Street and potential additional access from Kidgate.
Overall Development Prospects	**GOOD –** for development of a small scale store (less than 1,000 sq m net) **POOR –** for development of a large store (2,000 sq

SITE L3:	Queen Street Car Park, Louth
	m net or more)

SITE L4:	Morrisons Supermarket, Eastgate/Monks Dyke Road, Louth





This site comprises the existing Morrisons supermarket and surface car park in Louth Town Centre, an area of 1.2 ha, accessed from both Eastgate and Monks Dyke Head. The site could incorporate additional land to the west of the site including the former Stagecoach bus depot and additional commercial businesses, providing an additional 0.5 ha of land. A public highway (Orme Lane) runs through part of the site, connecting Monks Dyke with Eastgate. The site is within the town centre boundary but around 150m from protected shopping frontages. It is an edge-of-centre site in retail planning terms. The food store falls within the Louth conservation area. The site is unallocated in the adopted East Lindsey Local Plan (adopted 1995).

Evaluation Criteria	Comment
Availability	Short to medium term.
Scale of Development	Large scale: potential to extend/redevelop the existing store to 5,000 sqm, alongside surface car parking. Net increase around 3,000 sq m gross.
Commercial Potential	Established supermarket site with existing site frontage and adequate access/servicing points. Inclusion of the wider site would require assembly of land in at least two different ownerships. Consideration to be given to potential disruption to Morrison's trading.
Development Constraints	Edge of centre retail development will need to be justified in accordance with the NPPF. An electricity sub-station is located to the south of the store which could limit the potential for store extension to the south. The existing public highway will need to be accommodated/stopped up. Design will need to mitigate impact on the conservation area.
Possible Alternative Uses	As existing.
Access	Existing access from Eastgate and Monks Dyke Head. Proven service access under existing

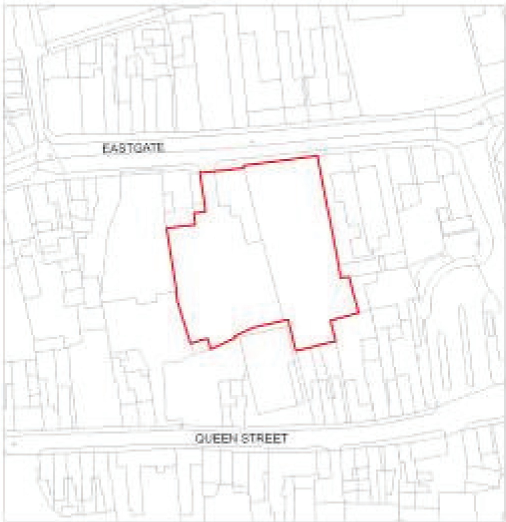
SITE L4:	Morrisons Supermarket, Eastgate/Monks Dyke Road, Louth
	configuration.
Overall Development Prospects	**GOOD** – assuming enlarged replacement Morrison store.

SITE L5:	The Malt Kiln, Newbridge Hill, Louth

This site comprises the former, and now disused, malt kiln off Newbridge Hill. The site is outside Louth Town Centre and approximately 400m from primary shopping streets and therefore comprises an out of centre site in retail planning terms. The site is unallocated in the East Lindsey adopted (1995) Local Plan. The site occupies an area of 0.9 ha.

Evaluation Criteria	Comment
Availability	Short term.
Scale of Development	Medium scale: 2,500-3,500 sq.m gross.
Commercial Potential	Good visibility and site frontage onto Newbridge Hill. Site access and servicing likely to be achievable. Site is in single ownership and is vacant/available for development. Site clearance and possible contamination could introduce abnormal costs, but this is unlikely to restrict food store development.
Development Constraints	The site is an out of centre site and will need to be justified in accordance with the NPPF. The site is not sequentially preferable to other assessed sites.
Possible Alternative Uses	Retail warehousing; commercial development; residential.
Access	Existing access from Newbridge Hill. Site access and servicing likely to be achievable.
Overall Development Prospects	**POOR –** due to out of centre location and poor connections to the town centre.

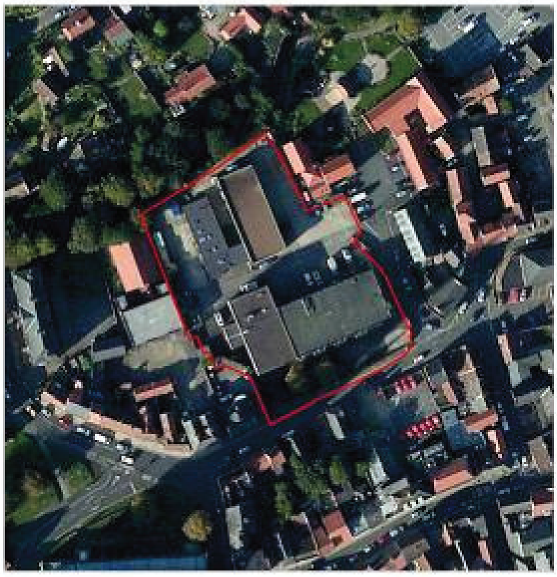
SITE L6: The Woodman Pub and Car Parks, Eastgate, Louth



This site comprises the currently closed Woodman Pub and associated car park on Eastgate. The site could be developed in conjunction with the adjacent ELDC owned public car park to make a combined site of 0.3ha. The site is constrained by existing buildings with limited potential for expansion. The site is within the town centre and in close proximity to primary shopping streets on Eastgate. The ELDC land is allocated as a car park under Policy TR4 in the East Lindsey adopted Local Plan (1995). It is understood that the pub has been recently sold.

Evaluation Criteria	Comment
Availability	Medium - long term
Scale of Development	Small scale: up to 1,500 sq.m gross.
Commercial Potential	The site is likely to be in at least two different ownerships and site assembly will be required. Would provide good frontage onto Eastgate with the potential to extend existing primary shopping streets. The site is small scale and constrained site with limited potential for expansion / provision of car parking. Service access could be a problem.
Development Constraints	The site is effectively 'in centre' in retail planning terms and provides the potential to extend primary shopping streets. The site is within the conservation area requiring a sensitive approach to design. Consideration would need to be given to units fronting on to Eastgate and their contribution to the street scene within the conservation area. Loss of car parking would need to be considered/re-provided as part of the scheme.
Possible Alternative Uses	Small scale retail or leisure uses.
Access	Existing access from Eastgate. Site access would need to be upgraded in order to facilitate service.
Overall Development Prospects	**POOR**

SITE L7: Gemini House, Chequergate, Louth



This site comprises the existing BT Telephone Exchange and adjacent commercial building at Chequergate on the edge of Louth town centre. The site occupies an area of 0.5 ha. The site is approximately 150m from Primary Shopping streets and comprises an edge of centre site in retail planning terms. The site falls within the Louth Town Centre conservation area and is allocated as an Action Area Redevelopment Site (Policy ENV13) in the East Lindsey Adopted Local Plan (1995).

Evaluation Criteria	Comment
Availability	Medium to long term.
Scale of Development	Small scale: up to 2,500 sq.m gross.
Commercial Potential	The site is understood to be in two different ownerships, requiring limited site assembly. Relocation of the telephone exchange, however, is likely to be difficult given the presence of fibre optic cables. The site would provide frontage onto Cheguergate although this is a narrow and secondary retail street.
Development Constraints	Edge of centre retail development will need to be justified in accordance with the NPPF. The site falls within the conservation area, requiring a sympathetic approach to design. Listed buildings are present on Chequergate to the south of the site.
Possible Alternative Uses	Smaller scale retail and other commercial development.
Access	Existing access is currently via Ludgate off Chequergate although this is a narrow street in close proximity to listed buildings. Adequate customer and service access is therefore likely to be constrained.
Overall Development Prospects	**POOR**

SITE H1: Tesco Superstore, Water Mill Road, Horncastle

This site comprises the existing Tesco supermarket, service yard and car park on the edge of Horncastle Town Centre. The site occupies an area of 1.3 ha with an additional 0.3 ha as potential expansion land (currently unused open space) to the north of the existing store. The site is outside the town centre boundary and approximately 200m from primary shopping streets. The site is therefore an edge of centre site in retail planning terms. The site is outside the Horncastle Conservation area. The entirety of the site appears to be within Flood Zone 3. Otherwise the site is unallocated in the 1995 Local Plan.

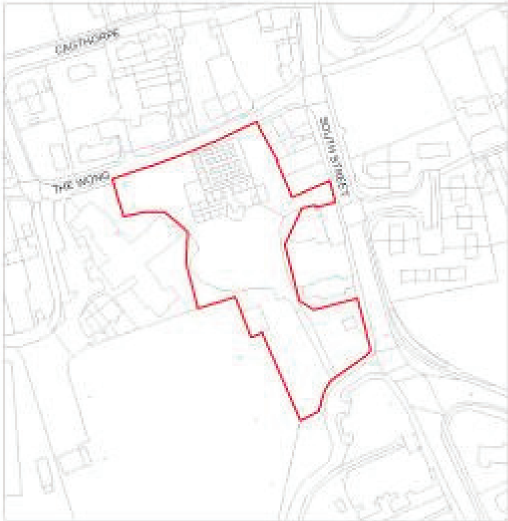
Evaluation Criteria	Comment
Availability	Short term.
Scale of Development (retail/leisure/community/cultural)	Large scale: potential to extend/redevelop the existing Tesco store to 5,000 sqm plus, alongside surface car parking.
Commercial Potential	Established supermarket site with existing site frontage and adequate access/servicing points. No site assembly required. Existing store and a sufficient site size to maintain continuity of trade during extension.
Development Constraints	Edge of centre retail development will need to be justified in accordance with the NPPF. The entirety of the site appears to be in Flood Zone 3.
Possible Alternative Uses	N/A
Access	Existing customer and service access from Conging Street.
Overall Development Prospects	**GOOD**

SITE H2: JT Friskney Site, West Street, Horncastle

This site comprises the existing JT Friskney retail store on the edge of Horncastle Town Centre. The site is approximately 150m from primary shopping streets in the centre and occupies an area of 0.7 ha. A retail foodstore could provide a more efficient use of an edge of centre site. Land to the south of the site, is understood to be a water meadow/active floodplain and is cultivated as a natural area by the Lincolnshire Wildlife Trust, precluding site expansion to the south and the creation of a more prominent frontage onto Jubilee Way.

Evaluation Criteria	Comment
Availability	Medium term.
Scale of Development (retail/leisure/community/cultural)	Small to Medium scale: around 3,000 sq.m gross (depending on site configuration, store type and car parking).
Commercial Potential	The site is likely to be within one ownership. The potential to create more effective site frontage onto Jubilee Way is constrained.
Development Constraints	Edge of centre retail development will need to be justified in accordance with the NPPF. The site lies within the conservation area, albeit the current uses make a negative contribution to the streetscape. Design will need to be sympathetic to minimise potential impact on the conservation area. One of the buildings within the site appears to be listed and will be required to be retained. The entirety of the site falls within Flood Zone 3.
Possible Alternative Uses	Continued non-food retail.
Access	Existing access from West Street. Access and servicing may be constrained by the presence of listed buildings and the need to maintain a continuous street frontage within the conservation area. Limited potential to create a direct access from Jubilee Way.
Overall Development Prospects	**REASONABLE**

SITE H3: Former Cattle Market, The Wong, Horncastle



This site comprises the former cattle market (now cleared) at The Wong on the edge of Horncastle Town Centre. The site is cleared and occupies an area of 0.7 ha. The site is about 250m from primary shopping streets and is segregated by the A138: Jubilee Way. The site lies just outside, but on the edge of, the Horncastle Conservation area and is allocated as an Action Area Redevelopment Site (Policy ENV13) in the East Lindsey Adopted Local Plan (1995).

Evaluation Criteria	Comment
Availability	Short term.
Scale of Development	Medium scale: up to 3,500 sq.m gross depending on site configuration and car parking requirements.
Commercial Potential	Potential to provide some limited retail frontage onto South Street. Adequate access and space for parking/servicing. The site is cleared and available, although site ownership details are unknown. A public right of way appears to run through the site. The site is separated from primary shopping streets with no established links.
Development Constraints	Edge of centre retail development will need to be justified in accordance with the NPPF. The site is further from primary shopping streets than other sites considered, and is segregated from the town by Jubilee Way. However, the site provides adequate access on the approach to the town and is outside the area of flood risk. The impact of the development on the conservation will need to be considered and addressed.
Possible Alternative Uses	Retail warehousing; other commercial/agricultural development; residential.
Access	Existing access from the Wong with the potential to have an additional access onto South Street.
Overall Development Prospects	**GOOD**

SITE A1: Alford Coal Supplies Ltd, Church Street, Alford

This site comprises an existing Alford Coal Supplies Ltd, as well as a number of other businesses and areas of open space. The current use of the site as a coal yard does not represent an efficient use of an edge centre site, and uses could be more efficiently located elsewhere. The site occupies an area of 1.7 ha. Development could incorporate the ELDC owned car park, providing retail frontage in close proximity to primary retail streets whilst providing replacement, and additional, shopper car parking for the centre. The site's frontage lies within the town centre boundary in close proximity to primary shopping streets. The remainder of the site is edge of centre in retail planning terms. Other than the town centre car park, the site lies adjacent to, Alford's Conservation Area. A listed building is present at the site's entrance. Parts of the site fall within flood zone 2. The site is allocated as an Action Area Redevelopment Site (Policy ENV13) in the East Lindsey Adopted Local Plan (1995).

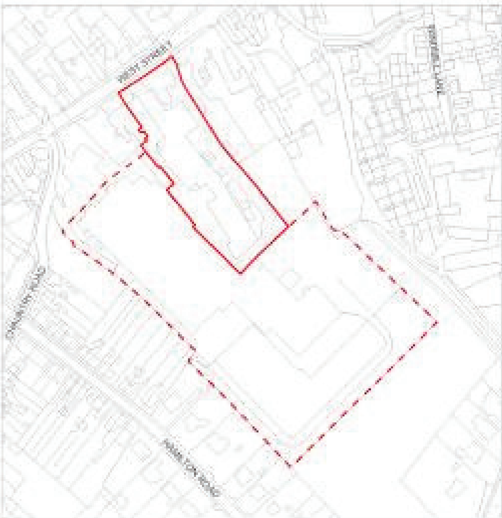
Evaluation Criteria	Comment
Availability	Medium term.
Scale of Development	Large scale: up to 5,000 sq m
Commercial Potential	In multiple ownership and need to potentially relocate existing businesses, including the coal yard. Properties on the site frontage would likely need to be retained, limiting visibility. It may be possible to utilise the South Market Place car park to provide more effective frontage.
Development Constraints	The frontage property is listed, and other frontage properties are within the conservation area and would likely need to retained as important heritage assets and features of the street scene. If incorporating the South Market Street car park, entrance to the site would be within the retail policy area in close proximity to primary shopping streets. Otherwise edge of centre retail development will need to be justified in accordance with the NPPF. Parts of the site appear to fall within flood zone 2.
Possible Alternative Uses	Continued employment/industrial use.
Access	Existing access from Church Street and South Market Place. Intensification of access and service access on Church Street could be limited by existing listed and frontage buildings.
Overall Development Prospects	**REASONABLE**

SITE A2:	**Easton and Son Dairy, South Street, Alford**

This site comprises the Easton and Son dairy on the edge of Alford Town Centre. The site includes the dairy buildings and part of a terraced property fronting onto South Street and occupies an area of 0.3 ha. Redevelopment of the site could provide a more efficient use of land if existing uses on the site, which do not require a town centre location, were relocated elsewhere. There is no scope for site expansion due to the presence of new development and listed buildings to the north and south. Part of the site lies within the town centre, and the entirety of the site falls within the conservation area. The site is allocated as an Action Area Redevelopment Site (Policy ENV13) in the East Lindsey Adopted Local Plan (1995). The terraced property within the site fronting onto South Street is listed by virtue of its attachment to a listed dwelling next door. The site is not within an area of flood risk.

Evaluation Criteria	Comment
Availability	Medium to long term.
Scale of Development	Small scale: less than 1,000 sqm with limited scope for surface car parking provision and servicing areas.
Commercial Potential	Costs associated with land assembly, relocation of existing facilities and clean up costs may prohibit development. The site is constrained in terms of size, precluding adequate car parking and access/service access. The scope for expansion is further restricted by the presence of listed buildings.
Development Constraints	The site is within the town centre boundary but approximately 100m from primary shopping streets. Edge of centre retail development will therefore need to be justified in accordance with the NPPF. The site is within the Alford conservation area, and adjacent to a listed building, requiring a sympathetic approach to design.
Possible Alternative Uses	Continued employment/agricultural uses.
Access	Existing access from South Street. Service access and circulation space likely to be a problem given the site's size.
Overall Development Prospects	**POOR**

SITE A2:	Easton and Son Dairy, South Street, Alford
SITE A3:	**The White Horse Hotel, West Street, Alford**



This site comprises the White Horse Hotel and land to the rear. The hotel is listed and is currently vacant. The hotel and land to the rear occupies an area of 0.6 ha. The site could be developed in conjunction with the adjacent industrial site, creating a larger site of 2.6 ha in total, or further land could be added to the north east. The site is outside the town centre and approximately 150m from primary shopping streets, comprising an edge of centre site in retail planning terms. Parts of the site are allocated as an Action Area Redevelopment Site (Policy ENV13) in the East Lindsey Adopted Local Plan (1995). The site lies outside, but adjacent to, the Alford conservation area.

Evaluation Criteria	Comment
Availability	Medium term.
Scale of Development	Medium-large scale: the wider site could accommodate 5,000 sq.m plus alongside adequate space for surface car parking.
Commercial Potential	Without incorporating adjacent land the site is too small and restricted to accommodate large food store development. The wider opportunities provide sufficient land facilitate large scale development albeit site assembly and clearance would be required.
Development Constraints	Edge of centre retail development will need to be justified in accordance with the NPPF. The listed hotel would likely need to remain and a sympathetic approach taken to food store design and layout.
Possible Alternative Uses	Retail warehousing (bulky goods), continued industrial us or residential development.
Access	Existing access from West Street is constrained by presence of listed building. New access to the wider site would need to be provided via Chauntry Road.
Overall Development Prospects	**POOR** - The hotel site alone. **REASONABLE** - wider site area.

Appendix 8 Food Store Economic Impact

Table 1C **Louth Food Store Turnover and Trade Draw 2018**

	Zone 1	Zone 2	Zone 3	% Inflow	Total
Trade Draw %	80	5	5	10	100
Turnover £M	16.00	1.00	1.00	2.00	£20.00

Notes:

Food store of 2,000 sq m net convenience goods sales
Sales density of £10,000 per sq m net
Total convenience good turnover of £20 million

Table 2C: **Alford Food Store Turnover and Trade Draw 2018**

	Zone 1	Zone 2	Zone 3	% Inflow	Total
Trade Draw %	10	5	70	15	100
Turnover £M	1.00	0.50	7.00	1.50	£10.00

Notes:

Food store of 1,000 sq m net convenience goods sales
Sales density of £10,000 per sq m net
Total convenience good turnover of £15 million

Table 3C **Convenience Expenditure 2018 £Million - Stores in Louth and Alford**

Centre/Facilities	Zone 1	Zone 2	Zone 3	% Inflow	Total Expend
Expenditure 2018	**£57.43**	**£18.74**	**£15.93**	**n/a**	
Large store in Louth	*£15.65*	*£0.96*	*£0.42*	*£1.99*	*£19.02*
Louth					
Morrison's	£12.66	£0.35	£0.48	£2.42	£15.91
Co-op	£8.07	£0.00	£0.35	£0.61	£9.03
Heron Foods	£1.26	£0.00	£0.11	£0.09	£1.47
Lincolnshire Co-op	£1.22	£0.00	£0.06	£0.08	£1.36
Other Louth	£6.30	£0.00	£0.13	£0.37	£6.80
Sub-total	**£45.16**	**£1.32**	**£1.55**	**£5.57**	**£53.60**
Horncastle					
Tesco	£0.31	£6.87	£0.10	£1.46	£8.74
Co-op	£0.00	£4.07	£0.03	£0.48	£4.58
Lincolnshire Co-op	£0.00	£0.23	£0.00	£0.03	£0.26
Heron Foods	£0.00	£0.95	£0.00	£0.11	£1.06
Other Horncastle	£0.17	£1.55	£0.00	£0.19	£1.91
Sub-total	**£0.48**	**£13.67**	**£0.14**	**£2.27**	**£16.56**
Alford					
Large store in Alford	*£1.00*	*£0.50*	*£7.00*	*£1.50*	*£10.00*
Lincolnshire Co-op	£0.00	£0.09	£1.79	£0.14	£2.02
Other Alford	£0.00	£0.00	£2.02	£0.12	£2.14
Sub-total	**£1.00**	**£0.59**	**£10.81**	**£1.76**	**£14.16**
Cleethorpe	£3.10	£0.00	£0.05	£41.75	£44.91
Grimsby	£5.02	£0.07	£0.18	£149.15	£154.42
Lincoln	£0.64	£1.40	£0.05	£124.63	£126.72
Mablethorpe	£0.78	£0.00	£0.77	£28.72	£30.28
Skegness	£0.00	£0.26	£1.69	£41.25	£43.20
Splisby	£0.05	£0.24	£0.31	£2.52	£3.11
Other	£1.20	£1.20	£0.37	£60.46	£63.23
Sub-Total	**£10.80**	**£3.17**	**£3.43**	**£448.47**	**£465.86**
Total	**£57.43**	**£18.74**	**£15.93**	**£458.08**	**£550.18**

Sources: Table 3B and 4B

Table 4C: Economic Impact Summary - Food Stores in Louth and Alford

Centre/Facilities	£M Turnover 2012	£M Turnover No new stores 2018	£M Turnover With New Stores 2018	£M Trade Diversion 2018	% Cumulative Impact	£M Benchmark Turnover	Above/below Benchmark Turnover Index
Large store in Louth	*n/a*	*n/a*	*£19.02*	*n/a*	*n/a*	*n/a*	*n/a*
Louth							
Morrison's	£23.24	£24.45	£15.91	-£8.54	-34.9%	£15.01	106.0
Co-op	£11.74	£12.36	£9.03	-£3.32	-26.9%	£9.47	95.4
Heron Foods	£1.75	£1.84	£1.47	-£0.38	-20.4%	£0.80	183.4
Lincolnshire Co-op	£1.57	£1.66	£1.36	-£0.29	-17.7%	£1.92	71.0
Other Louth	£7.09	£7.47	£6.80	-£0.66	-8.9%	£5.32	127.9
Sub-total	**£45.40**	**£47.78**	**£34.58**	**-£13.19**	**-27.6%**	**£32.52**	**106.3**
Horncastle							
Tesco	£9.30	£9.79	£8.74	-£1.05	-10.7%	£10.96	79.8
Co-op	£4.60	£4.84	£4.58	-£0.26	-5.4%	£6.00	76.4
Lincolnshire Co-op	£0.26	£0.27	£0.26	-£0.01	-3.8%	£1.50	17.4
Heron Foods	£1.05	£1.10	£1.06	-£0.04	-3.8%	£0.86	123.4
Other Horncastle	£1.84	£1.94	£1.91	-£0.03	-1.5%	£2.28	83.9
Sub-total	**£17.06**	**£17.95**	**£16.56**	**-£1.39**	**-7.7%**	**£21.60**	**76.7**
Alford							
Large store in Alford	*n/a*	*n/a*	*£10.00*	n/a	n/a	n/a	n/a
Lincolnshire Co-op	£2.72	£2.87	£2.02	-£0.85	-29.6%	£2.41	83.7
Other Alford	£2.28	£2.40	£2.14	-£0.25	-10.6%	£1.33	161.2
Sub-total	**£5.00**	**£5.26**	**£4.16**	**-£1.10**	**-21.0%**	**£3.74**	**111.2**
Cleethorpe	£44.47	£46.80	£44.91	-£1.90	-4.1%	n/a	n/a
Grimsby	£150.51	£158.40	£154.42	-£3.97	-2.5%	n/a	n/a
Lincoln	£121.80	£128.16	£126.72	-£1.45	-1.1%	n/a	n/a
Mablethorpe	£30.59	£32.19	£30.28	-£1.92	-5.9%	n/a	n/a
Skegness	£43.83	£46.14	£43.20	-£2.94	-6.4%	n/a	n/a
Splisby	£3.43	£3.61	£3.11	-£0.50	-13.8%	n/a	n/a
Other	£60.71	£63.89	£63.23	-£0.66	-1.0%	n/a	n/a
Sub-Total	**£455.35**	**£479.20**	**£465.86**	**-£13.34**	**-2.8%**		
Total	**£522.81**	**£550.18**	**£550.18**	**-£29.02**			

Table 5C **Horncastle Food Store Turnover and Trade Draw 2018**

	Zone 1	Zone 2	Zone 3	% Inflow	Total
Trade Draw %	5	70	5	20	100
Turnover £M	0.75	10.50	0.75	3.00	£15.00

Notes: Food store of 1,500 sq m net convenience goods sales
Sales density of £10,000 per sq m net
Total convenience good turnover of £15 million

Table 6C: Economic Impact Summary - Horncastle Food Store (1,500 sq m net Convenience Sales)

Centre/Facilities	£M Turnover 2012	£M Turnover No new stores 2018	£M Turnover New Store in Alford 2018	£M Trade Diversion 2018	% Impact	£M Benchmark Turnover	Above/below Benchmark Turnover Index
Large store in Horncastle	*n/a*	*n/a*	*£15.00*	*n/a*	*n/a*	*n/a*	*n/a*
Louth							
Morrison's	£23.24	£24.45	£23.62	-£0.83	-3.4%	£15.01	157.4
Co-op	£11.74	£12.36	£12.25	-£0.11	-0.9%	£9.47	129.3
Heron Foods	£1.75	£1.84	£1.83	-£0.01	-0.5%	£0.80	229.4
Lincolnshire Co-op	£1.57	£1.66	£1.65	-£0.01	-0.4%	£1.92	85.8
Other Louth	£7.09	£7.47	£7.45	-£0.02	-0.2%	£5.32	140.0
Sub-total	**£45.40**	**£47.78**	**£46.80**	**-£0.97**	**-2.0%**	**£32.52**	**143.9**
Horncastle							
Tesco	£9.30	£9.79	£4.13	-£5.65	-57.8%	£10.96	37.7
Co-op	£4.60	£4.84	£2.94	-£1.90	-39.3%	£6.00	49.0
Lincolnshire Co-op	£0.26	£0.27	£0.20	-£0.07	-26.5%	£1.50	13.3
Heron Foods	£1.05	£1.10	£0.67	-£0.44	-39.7%	£0.86	77.4
Other Horncastle	£1.84	£1.94	£1.75	-£0.19	-9.6%	£2.28	77.0
Sub-total	**£17.06**	**£17.95**	**£9.69**	**-£8.25**	**-46.0%**	**£21.60**	**44.9**
Alford							
Lincolnshire Co-op	£2.72	£2.87	£2.77	-£0.10	-3.5%	£2.41	114.8
Other Alford	£2.28	£2.40	£2.38	-£0.02	-0.6%	£1.33	179.1
Sub-total	**£5.00**	**£5.26**	**£5.15**	**-£0.11**	**-2.2%**	**£3.74**	**137.7**
Cleethorpe	£44.47	£46.80	£46.52	-£0.28	-0.6%	n/a	n/a
Grimsby	£150.51	£158.40	£157.46	-£0.93	-0.6%	n/a	n/a
Lincoln	£121.80	£128.16	£125.88	-£2.28	-1.8%	n/a	n/a
Mablethorpe	£30.59	£32.19	£31.78	-£0.42	-1.3%	n/a	n/a
Skegness	£43.83	£46.14	£45.28	-£0.86	-1.9%	n/a	n/a
Splisby	£3.43	£3.61	£3.35	-£0.27	-7.4%	n/a	n/a
Other	£60.71	£63.89	£63.28	-£0.61	-1.0%	n/a	n/a
Sub-Total	**£455.35**	**£479.20**	**£473.54**	**-£5.66**	**-1.2%**		
Total	**£522.81**	**£550.18**	**£550.18**	**-£15.00**			

Sources: Tables 5B to 10B