Executive Summary

E.1 The objectives of the East Lindsey Shopping Study 1999 (ELSS) are to provide an understanding of current shopping patterns across the district. The conclusions of the study are intended to act as an input to the review of the East Lindsey Local Plan and to assist the Authority in its assessment of retail development proposals.

E.2 The ELSS is being undertaken in stages: Part 1 sets out the findings of a major household shopping survey and associated analysis; Part 2 comprises a comprehensive survey of retail floorspace in the district; and Part 3 will comprise a capacity assessment for the future of retail development within the district.

E.3 This report is concerned with Part 1 and sets out the results of a household telephone survey undertaken between 2-12 April 1999.

E.4 For the purposes of the ELSS, the district is sub-divided into 7 sub-areas based upon the district's 7 principal shopping centres.

E.5 Local consumer expenditure estimates commissioned from URPI have been obtained for each of the 7 sub-areas.

Study Area Population and Expenditure

E.6 The study area, which comprises all of the district together with limited adjacent areas from which shopping centres within the district may expect to capture an element of trade, had a 1995 population of 126721 and a 1999 population of 130825. The area's population will increase by 1.6% to 132927 by 2001 and 3.8% to 137987 by 2006.

Expenditure

E.7 Retail expenditure within the study area is slightly above the national average. In 1995 (the latest year for which detailed estimates are available) expenditure within the study area on convenience goods was 1.3% above the national average with a comparable figure for comparison goods being 2.6% above the national average.

Expenditure Growth

E.8 At the present time it is estimated that expenditure on convenience goods within the study area totals some £167.6 million. This is projected to increase to £171.5 million by 2001 and £181.2 million by 2006, an overall increase of 13.7 million (8.25%).

E.9 Comparable figures for comparison goods expenditure indicate a current level of spending of £231.5 million increasing to £317.6 million in 2006, an increase of 37.2%.

E.10 This expenditure data, coupled with the results of the floorspace survey and the shopper survey summarised below will comprise basic inputs into the capacity assessment to be undertaken as Part 3 of the ELSS.

Summary Results of Shopping Survey

Non Food Shopping

E.11 Reflecting the local retail hierarchy throughout the study area as a whole Lincoln, Grimsby and Boston were identified as the principle designations for main non food shopping trips. Each of these centres accounted for between 17% and 22% of all main comparison shopping.

E.12 Within the district only Skegness (15.3%) and Louth (12.5%) were identified as principle designations for respondents non food shopping.

E.13 Reasons of accessibility, coupled with factors relating to the quality, choice, variety of shopping and the overall shopping environment were identified as the main factors for using the centres identified by respondents.

E.14 With respect to secondary non food shopping, apart from Louth and Skegness no other centre within the district accounted for any significant element of non food shopping trips.

Food Shopping

Louth Area

E.15 Food stores in Louth retained approximately 55% of all food expenditure generated from within the Louth area.

E.16 However significant variations in patterns of expenditure were revealed between those areas immediately around the town and the more remote parts of the Louth area to the north and north west. In these areas retail outlets in Cleethorpes/Grimsby accounted for some two thirds to three quarters of locally generated convenience spending.

E.17 The results of the survey indicate that the north western and northern parts of the district should be considered to comprise part of the Cleethorpes/Grimsby catchment area and not the Louth area for retail planning purposes.

Mablethorpe Area

E.18 The survey reveals that foodstores in Louth capture a larger proportion (37%) of convenience expenditure generated within the Mablethorpe area than do Mablethorpe foodstores itself (31%).

E.19 The principle destination for Mablethorpe residents undertaking convenience shopping in Louth is the Louth Pioneer store. This is a comparable facility to the new Pioneer store at Mablethorpe which offers a similar type of shopping facility with no significant difference in prices.

E.20 This pattern of shopping behaviour indicates that people are choosing to visit Louth for reasons other than main food shopping alone, for example, because of the wide range of shopping facilities it offers. This conclusion is borne out by other results from the survey which reveal that visits to Louth for food shopping purposes are conjoined with trips to other shopping and leisure facilities etc.

E.21 This finding indicates that Louth would continue to attract a relatively high proportion of expenditure generated in the Mablethorpe area even if food shopping facilities in Mablethorpe were to be expanded.

Alford Area

E.22 Alford retains only 25% of locally generated expenditure on main food shopping trips; approximately 50% of locally generated expenditure flows in broadly equally proportions to Skegness and Louth with a further 10% going to Cleethorpes/Grimsby and some 6% to Mablethorpe.

E.23 However the town retains approximately two thirds (64%) of expenditure undertaken on secondary food shopping trips.

E.24 While the results of the survey reveal that an element of food shopping trips by Alford residents to more distant centres is undertaken on a "linked" basis the survey results suggest there is scope to increase expenditure retention levels in Alford by the enhancement of local convenience shopping facilities.

Spilsby Area

E.25 Main food shopping expenditure generated from within the Spilsby area is principally accounted for in broadly equal parts between Boston (35%) and Spilsby (33%). Skegness accounts for a further 22% of such expenditure.

E.26 Spilsby accounts for some 73% of all secondary food expenditure undertaken by local residents.

E.27 The results of the survey indicate that there is potential to increase local retention rates in Spilsby by the provision of enhanced convenience shopping facilities in the town.

Skegness Area

E.28 Reflecting the range of food shopping facilities available within the town Skegness accounts for some 84% of locally generated expenditure on main food shopping trips. The only other significant destination for main food shopping trips is Boston (7%) which is largely accounted for by expenditure leaking from the southern part of the Skegness area which has good accessibility to Boston.

Horncastle Area

E.29 Horncastle retains some 49% of locally generated expenditure on main food shopping. However distinct differences are evident between those areas close to Horncastle and that part of the Horncastle area located around the western fringes of the district.

E.30 Within those part of the Horncastle area close to the town Horncastle retains between two thirds and three quarters of all main food shopping expenditure. Conversely, on the western fringe of the district the comparable figure is a mere 3%; i.e. 97% of locally generated main food expenditure from this area is not spent in Horncastle but in other centres elsewhere.

E.31 This pattern of expenditure reflects the influence of Lincoln which accounted for some 85% of all main food expenditure generated within the western fringe area.

E.32 Information relating to secondary food shopping patterns also demonstrates that people living on the western fringe of the Horncastle area also failed to use Horncastle for their secondary or top up shopping; they were much more likely to use centres such as Bardney and Market Rasen.

E.33 Given that secondary or top up shopping is generally undertaken locally i.e. very close to where people live, the high levels of usage of Bardney and Market Rasen for such shopping, combined with the low level of patronage of Horncastle indicates that residents consider such centres to be more accessible and more convenient shopping destinations than Horncastle.

E.34 The evidence of the survey suggests that the western fringe of the district should therefore be considered more properly as part of the Lincoln (or

Market Rasen) catchment area for convenience shopping in retail planning terms rather than the Horncastle catchment area.

Coningsby/Tattershall Area

E.35 This area experiences significant outflow of main food expenditure with Boston capturing some 45% of main food expenditure and Lincoln some 14%. Within the area Woodhall Spa captures some 17% and Coningsby/Tattershall some 12%.

E.36 The new Budgens at Woodhall Spa is the largest foodstore in the area and has a significant influence on local shopping patterns. With regard to secondary food shopping this store attracted some 46% of such expenditure compared with 18% in Coningsby/Tattershall.

E.37 In overall terms the new Budgens at Woodhall Spa is the dominant outlet in this regard accounting for some 21% of all secondary food shopping expenditure.