



NORTH LINCOLNSHIRE RETAIL
& LEISURE STUDY 2019
(INCORPORATING 2020 SELECTIVE UPDATE)

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Section 1:

Introduction & Background

1. Introduction & Background

Introduction & Scope of Assessment

- 1.1 ELG Planning were commissioned by North Lincolnshire Council to prepare the North Lincolnshire Retail & Leisure Study 2019, which was prepared in line with the National Planning Policy Framework (NPPF) and National Planning Practice Guidance (NPPG) to provide a robust and credible evidence base to inform the Council's preparation of the new North Lincolnshire Local Plan to cover the period to 2036.
- 1.2 However, the plan period has subsequently been altered to cover the period 2020-2038 and the selective update to the Retail & Leisure Study provides updated commentary on the current economic climate and changes within the retail and leisure sectors, as well as updated assessments of the need for new main town centre use floorspace to reflect the revised plan period.
- 1.3 The Study undertakes the following key tasks outlined by North Lincolnshire Council:

Task One: Planning Background & Retail Trends

The study will outline the relevant planning policy context for the preparation of the Retail & Leisure Study and provides an overview of economic conditions and recent trends in the retail sector that are likely to impact on the need for new retail floorspace in North Lincolnshire over the Plan period.

Task Two: Future Shopping Needs	The study will assess the quantitative capacity and qualitative need for additional convenience and comparison goods across North Lincolnshire in the period to 2038.
Task Three: Town Centre Leisure Uses	The Retail & Leisure Study will also assess the quantitative and qualitative need for other main town centre uses across North Lincolnshire over the Plan period.
Task Four: Health of Town & District Centres in North Lincolnshire	The study will assess the vitality and viability of the main town and district centres across North Lincolnshire based upon a number of key indicators.

Structure of Assessment

- 1.4 This Retail & Leisure Study is structured as follows:
- 1.5 Section 2 summarises the relevant policy context.
- 1.6 Section 3 considers the current economic outlook and recent retail trends.
- 1.7 Section 4 provides a quantitative assessment of the capacity for additional retail floorspace within North Lincolnshire over the Plan period.
- 1.8 Section 5 provides an assessment of the need for other main town centre uses over the Plan period.
- 1.9 Section 6 considers the qualitative need for new retail facilities and other associated improvements within centres across North Lincolnshire to maintain their long term vitality and viability.

1.10 Section 7 provides a summary of the health check assessments of the individual centres within North Lincolnshire.

1.11 Section 8 provides a summary and conclusions.



Section 2:

Policy Context

2. Policy Context

National Planning Policy

- 2.1 The revised National Planning Policy Framework (NPPF) was published in February 2019 and sets out the Government's planning policies for England and how these should be applied. It provides a framework within which locally-prepared plans for housing and other development can be produced.
- 2.2 Paragraph 7 of the NPPF confirms that the purpose of the planning system is to contribute to the achievement of sustainable development. Paragraph 8 goes on to state that achieving sustainable development means that the planning system has three overarching objectives, which are interdependent and need to be pursued in mutually supportive ways (so that opportunities can be taken to secure net gains across each of the different objectives):
- a) An economic objective – to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure;
 - b) A social objective – to support strong, vibrant and healthy communities, by ensuring that a sufficient number and range of homes can be provided to meet the needs of present and future generations; and by fostering a well-designed and safe built environment, with accessible services and open spaces that reflect current and future needs and support communities' health, social and cultural well-being; and

- c) An environmental objective – to contribute to protecting and enhancing our natural, built and historic environment; including making effective use of land, helping to improve biodiversity, using natural resources prudently, minimising waste and pollution, and mitigating and adapting to climate change, including moving to a low carbon energy.

2.3 These objectives should be delivered through the preparation and implementation of plans and the application of policies in the Framework. Planning policies and decisions should play an active role in guiding development towards sustainable solutions, but in doing so should take local circumstances into account, to reflect the character, needs and opportunities of each area.

Plan-Making

2.4 Section 3 of the NPPF reiterates that the planning system should be genuinely plan-led. Succinct and up-to-date plans should provide a positive vision for the future of each area; a framework for addressing housing needs and other economic, social and environmental priorities; and a platform for local people to shape their surroundings.

2.5 Paragraph 17 confirms that the Development Plan must include strategic policies to address each local planning authority's priorities for the development and use of land in its area. The Framework goes on to advise that strategic policies should set out an overall strategy for the pattern, scale and quality of development, and make sufficient provision for, *inter alia*, housing (including affordable housing), employment, retail, leisure and other commercial development. Strategic policies should look ahead over a minimum 15-year period from adoption to anticipate and respond to long-term requirements and opportunities, such as those arising from major improvements in infrastructure.

- 2.6 Paragraph 31 advises that the preparation and review of all policies should be underpinned by relevant and up-to-date evidence. This should be adequate and proportionate, focused tightly on supporting and justifying the policies concerned, and take into account relevant market signals.

Ensuring the Vitality of Town Centres

- 2.7 Paragraph 85 of the NPPF confirms that planning policies and decisions should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation. Planning policies should:

- a. Define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
- b. Define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
- c. Retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
- d. Allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
- e. Where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge-of-centre sites that are well-connected to the town centre. If sufficient edge-of-centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well-connected to the town centre; and

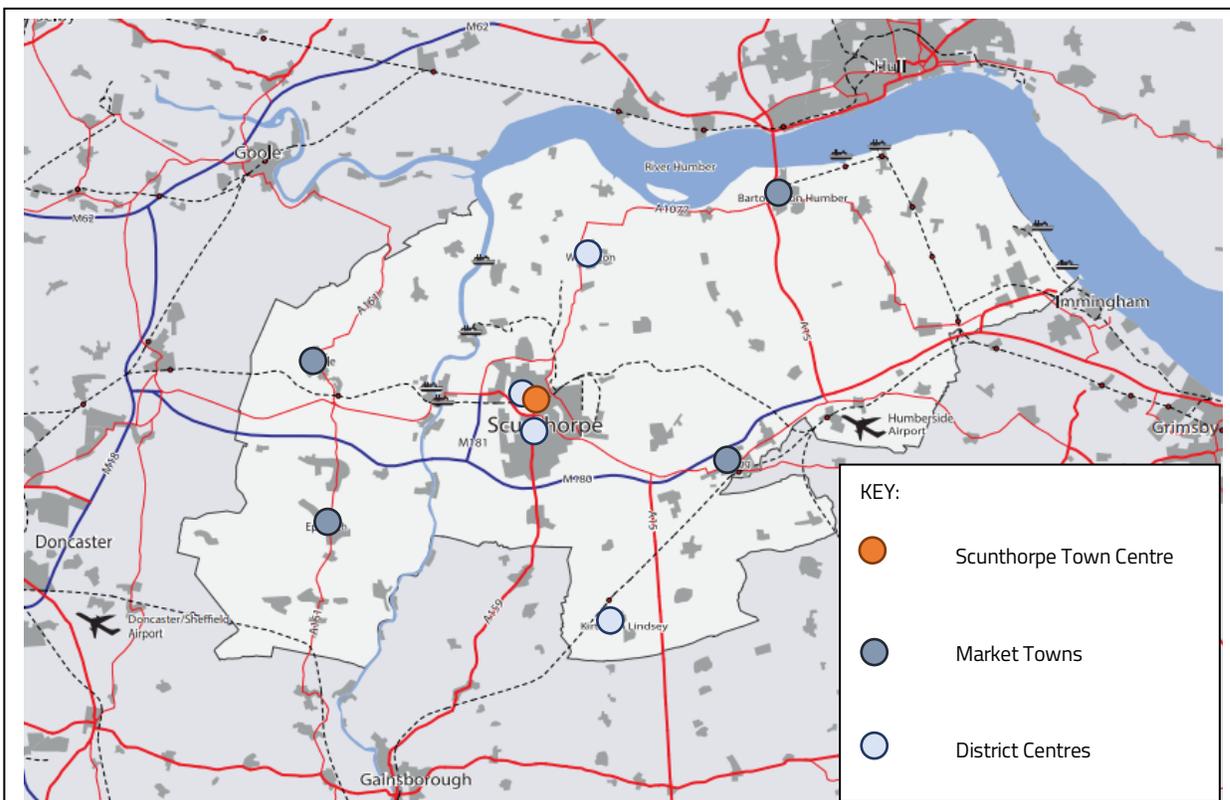
- f. Recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.

North Lincolnshire Local Plan (2003)

- 2.8 The North Lincolnshire Local Plan was adopted in 2003 and contains a number of 'saved' shopping policies relating to new retail and leisure development within the designated centres, as well as in edge-of-centre and out-of-centre locations. The adopted Local Plan also includes policies in relation to the provision of small local shops and restaurant and hot food takeaway uses.

North Lincolnshire Core Strategy (2011)

- 2.9 The North Lincolnshire Core Strategy was adopted in June 2011 and sets out the long term vision for North Lincolnshire and provides a blueprint for managing growth and development in the area up to 2026.
- 2.10 Policy CS14 sets out the following hierarchy of centres in North Lincolnshire:



Town Centre	Scunthorpe Town Centre
Market Towns	Barton-upon-Humber Brigg Crowle Epworth
District Centres	Kirton-in-Lindsey Winterton Ashby High Street Frodingham Road
Local Centres / Corner Shops	There are a network of local centres and corner shops providing vital day-to-day shopping facilities for local communities across the area.

Figure 2.1: Retail Hierarchy in North Lincolnshire

- 2.11 Policy CS15 of the adopted Core Strategy confirms that a balanced and socially inclusive cultural and evening economy will be promoted within North Lincolnshire by supporting uses such as museums, theatres, restaurants, café bars and leisure uses within Scunthorpe Town Centre and market towns. Elsewhere, Policy CS15 suggests that schemes that extend the range of cultural and evening economy uses will be supported where they are consistent with the size and function of the centre.

North Lincolnshire Housing & Employment Allocations DPD (March 2016)

- 2.12 The Housing & Employment Allocations DPD was adopted in March 2016 and sets out which sites the council has allocated for future housing development and where new employment opportunities will be located. It also defines town and district shopping centre boundaries to show where future retail development should take place and settlement development limits.
- 2.13 The Housing & Employment DPD considers the requirements for future retail development and the town centre boundaries of Scunthorpe, Brigg, Barton upon Humber, Crowle, Epworth and district shopping at Ashby High Street and Frodingham Road in Scunthorpe, as well as at Kirton in Lindsey and Winterton.
- 2.14 The DPD outlines that Scunthorpe is North Lincolnshire's main retail and service centre and as such provides the bulk of the area's housing, employment, education and leisure facilities. Recent years have seen significant investment in Scunthorpe town centre with the opening of the multi-million pound Parishes retail complex, which has improved the range and type of shops on offer and provided a new multi-screen cinema. However, it is noted that much still needs to be done to improve the retail offer and improve the town centre's environment.

- 2.15 The Housing & Employment Allocations DPD also reiterates the key objectives of the adopted Core Strategy in terms of safeguarding and enhancing Scunthorpe as a major sub-regional shopping destination as envisaged by the Scunthorpe Urban Renaissance Programme. It is suggested that this will introduce a new mix of uses to the town centre including enhanced opportunities for retail and cultural development within a high quality, well designed built environment and public realm. This will help to secure high quality new development, which substantially improves the town centre's retail offer in quantitative and qualitative terms. The overall aim is to create a centre where people chose to shop because of its excellent range and offer of shops and attractiveness as a retail destination.
- 2.16 Paragraph 5.5 of the Housing & Employment Allocations DPD makes reference to the retail hierarchy contained within Policy CS14 of the adopted Core Strategy, which states that, following the sub regional town centre of Scunthorpe are the Market Town centres of Barton upon Humber and Brigg with further smaller town centres in Crowle and Epworth providing for convenience and comparison shopping needs. These town centres also offer a range of leisure facilities and other supporting services. Kirton in Lindsey and Winterton are also classed as Market Towns and are important service centres but, due to fewer services and retail provision, are considered to be district centres rather than town centres. In terms of retail hierarchy, below the Market Towns fall the district centres of Ashby High Street and Frodingham Road, both of which are located in the Scunthorpe urban area. Both provide for local shopping needs but not on the same scale as the Market Towns. Elsewhere a range of smaller local centres, shopping parades and corner shops provide a vital range of shops and facilities for their local communities, both urban and rural.
- 2.17 Policy TC-1 sets out the range of uses that will be permitted within the town centre boundary of Scunthorpe, as well as within the defined Primary Shopping Frontages. The policy also outlines the range of uses that will be permitted within the other designated centres across North Lincolnshire.

Lincolnshire Lakes Area Action Plan (May 2016)

- 2.18 The Lincolnshire Lakes AAP was adopted in May 2016 and sets out the planning policy framework for the delivery of the Lincolnshire Lakes development. The project will create a number of high quality sustainable village communities on land between the western edge of Scunthorpe and the River Trent and will include a new District Centre and a network of Local Centres.



Section 3:

National Retail Trends

3. National Retail Trends

- 3.1 This section of the assessment considers recent economic conditions and the near to long-term outlook, as well as recent trends in the retail sector that are likely to impact on the need for new retail and main town centre uses in North Lincolnshire over the revised Plan period.

Economic Outlook

- 3.2 The latest Experian Retail Planner Briefing Note 17 (February 2020) identifies that the UK economy remains on a slow growth path due to lingering uncertainty during the Brexit transition period and a sluggish global economy. The UK economy slowed over 2019 with growth sliding to a 7 year low by the end of the year. However, there were indications of a pick up in business confidence and investment intentions. The recovery in consumer spending is also forecast to remain muted, reflecting sluggish income growth. On this basis, Experian project GDP growth to remain in the region of 1.0 to 1.5% in 2020 and 2021, which is well below the performance of earlier years.
- 3.3 In terms of consumer spending, Experian highlight that household spending growth slowed to an 8 year low of 1.2% in 2019. Consumer appetite for durables, property and, in particular, cars was notably muted. Looking ahead, prospects for incomes remain mixed. Real income growth is projected to average 1.3% in 2020 and consumer spending growth will remain below 1.5%.
- 3.4 Experian identify that retail sales volumes grew by 3% in 2019, the weakest reading since 2014. The weakening trend was concentrated in non-food stores. Department stores and household goods

retailers bore the brunt, suffering from a fall in sales of durable goods. In contrast, sales from predominantly on-line retailers picked up momentum with growth rising to 15%, compared with 10% in 2018. Retail spending growth per head is expected to be 2.0% in 2020 rising to 2.3% in 2021.

3.5 For the 2022-2026 period, Experian expect retail spend per head to average 2.2% per annum with a contrast between 0.1% p.a. for convenience goods and 3.2% p.a. for comparison goods.

3.6 In terms of the long-term outlook, Experian highlight that the final terms of the new economic relationship between the UK and EU will be a major consideration. It is suggested that the new terms are unlikely to be as favourable as full EU membership, which in turn impacts the long-term outlook for trade, investment and GDP. Experian forecast that long term GDP growth will average 1.7% per annum, which is below the historic long-term trend growth of 2.3%. Consumer spending growth is now forecast to average 2.2% in the period to 2040, with retail sales growth averaging 2.3%, again with a marked difference between 0.1% p.a. for convenience goods and 3.0% p.a. for comparison goods.

Internet & Multi-Channel Retailing

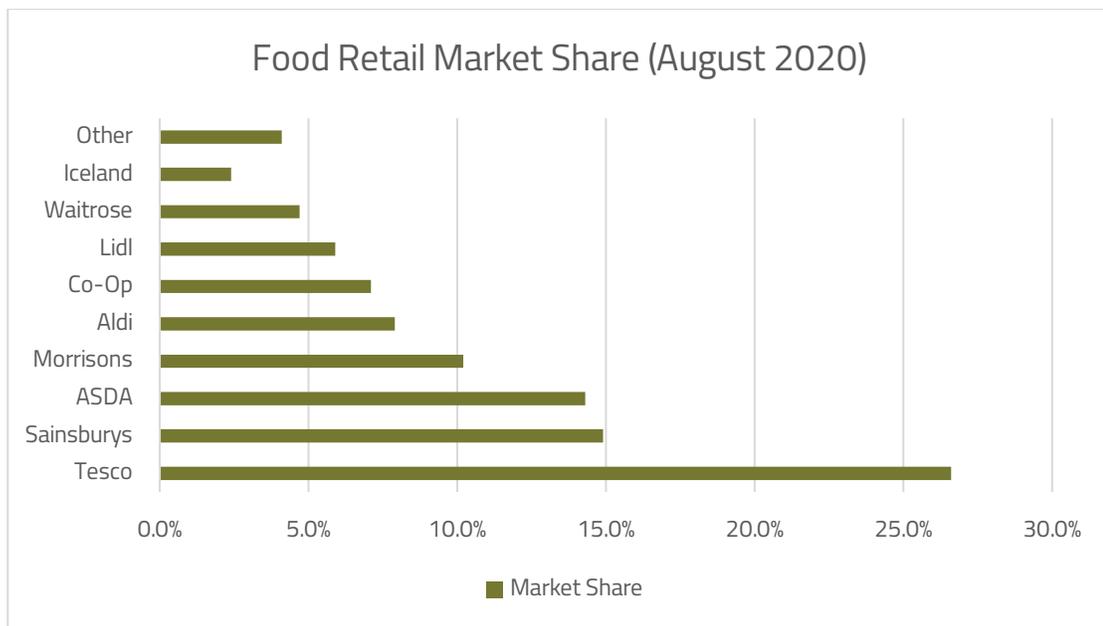
3.7 One of the key influences on the retail sector in the last decade has been the significant increase in the popularity of internet shopping with the majority of retailers now having an on-line presence. The growth in on-line retailing has lifted the share of special forms of trading (SFT) to a level where it now accounts for approaching one-fifth of total retail sales. Experian data shows that the value of internet sales in 2018 was estimated at £76.7bn at current prices, with the internet share of total retail sales standing at approximately 19% in 2018 compared with under 7% in 2008.

- 3.8 Experian forecast that non-store retailing will continue to grow rapidly and will continue to outpace traditional forms of spending. There were however estimated to be 63.1 million internet users in the UK in December 2017 (representing 94.7% of the population) and, accordingly, growth in the internet user base will be less of a driver than over the course of the last decade. However, it is anticipated that growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boosts internet retailing. By 2038, the end of the Local Plan period, Experian project a non-store retail sales market share of around 32%.
- 3.9 The recently published '*Grimsey Review 2*' identifies that shoppers are now increasingly buying their goods online, whilst visiting the physical shopping locations for services such as hairdressers, nail bars and coffee shops. The review highlights that over 17% of consumers now shop online at least some of the time and that habits have been changing rapidly, as new technology offers cheaper online alternatives to high streets and retail parks, driven in particular by the rapid growth in smartphone ownership.
- 3.10 It is anticipated that click and collect will be one of the key drivers of growth with drive thru' pick-up sites, lockers and existing stores rising in importance as locations for the receipt or return of products ordered on-line. '*The Multichannel High Street: Winning the Retail Battle in 2015*' report prepared in partnership with the Retail Trust and British Retail Consortium identifies that approximately 60% of retailers surveyed as part of the study already offered click and collect with many others intending to launch the service in 2015. For example, ASDA had in excess of 600 click and collect locations at the end of 2014, including existing supermarkets, petrol station forecourts, tube stations and business park sites. The '*Grimsey Review 2*' highlights that it is estimated that click and collect will be used for £9.6bn of retail sales by 2022.

- 3.11 However, a network of stores is likely to remain a key component of retailer's strategies as part of a wider multi-channel offer, providing a showroom setting and showroom experience incorporating new retail concepts and further technological advances such as augmented reality technology (AR) or virtual reality (VR) shopping experiences.
- 3.12 Since March 2020 the retail sector and the UK economy as a whole have been very significantly affected by the Covid-19 pandemic. It has had a dramatic impact on shops and spending patterns, as shown by the closure of numerous retailers and indications of poor retail prospects. Retailing has experienced a downturn in 2020 which will have a bearing on future levels of expenditure. The short term effects are likely to be significant. It is expected that there will be a recovery in the national economy and in the retail market but the timing is uncertain. It has been reported by the Office for National Statistics (ONS) that Internet sales as a proportion of all retailing increased between June 2019 and June 2020 by 6.0 percentage points for predominantly food stores. For predominantly non-food stores and other non-store retailing the increases were 17.4 and 2.2 percentage points respectively. The weighted average for non-food retailing combined is 6.7%.

Food Retailing

- 3.13 The '*Big Four*' supermarkets continue to dominate the food retail sector and Tesco remain the UK's largest food and grocery retailer with 26.6% of the market, followed by Sainsburys (14.9%), ASDA (14.3%), and Morrisons (10.2%). However, the '*Big Four*' have all experienced difficult trading conditions in recent years with their collective market share having fallen from 75.7% in June 2013 to 66.0% in August 2020.



- 3.14 The difficulties faced by the leading food retailers reflect the fact that there is over capacity in the market with Tesco, Sainsburys and Morrisons having expanded their floorspace by more than the growth of UK grocery sales. In view of weak growth in convenience goods expenditure, changing UK demographics, increasing online sales and a growing emphasis amongst consumers on price and value for money in convenience goods, the leading grocery retailers have, on the whole, cut back their plans for new investment in recent years.
- 3.15 In response to trading difficulties over recent years, Tesco completed the takeover of cash and carry group Booker in 2018 and also announced a '*strategic alliance*' with French retailer Carrefour in an attempt to use their joint buying power to cut costs and offer lower prices to customers to counter the increased competition from the rapidly expanding discount chains Aldi and Lidl. Tesco also unveiled a new discount chain called Jack's in late 2018 to compete directly with Aldi and Lidl. They also announced the closure of a number of Tesco Metro stores in October 2018. Tesco are also continuing to repurpose their existing space in an attempt to improve sales densities in their larger stores and improve the

customer offer. This has included opening 49 concessions within their stores, with partners including Arcadia Group and Holland & Barrett and the closure of 90 deli counters in stores across the UK.

- 3.16 Tesco also announced towards the end of 2019 that they are planning to open 150 Express format stores across the UK over the next three years, as well as a further four superstores. Whilst the first Jack's store in Rawtenstall closed in September 2019 and there was speculation that Tesco would look to close the chain, it has recently been announced that a 13th Jack's store is due to open in Hull.
- 3.17 Sainsburys and ASDA announced merger plans in 2018 and the combined business would have become the largest grocery retailer in the UK with a market share in excess of 30%. The firms' rationale behind the merger was to make significant cost savings to make them more competitive on prices, as well as being able to make greater levels of investment. However, the proposed merger was recently blocked by the Competition and Markets Authority (CMA), who concluded that the deal would lessen competition at both a national and local level. Sainsburys have subsequently undertaken a review of their store estate and are proposing to close 10-15 existing supermarkets with 10 new stores to be developed. They are also planning to close 10-15 Sainsbury's Local format stores, although it is planned to develop a further 110 new convenience Local stores across the UK. Sainsburys also acquired Argos' parent company in 2016 and have announced that they are going to close 70 Argos stores with a further 80 to be provided as concessions at existing supermarket sites.
- 3.18 Despite challenging market conditions, Morrisons achieved more than three years of positive like-for-like growth up to September 2019 and are continuing with their estate renewal programme with a number of new store openings announced. Morrisons have also begun wholesale supply with Harvest Energy, which together with partnerships with Rontec, Sandpiper and McColls, will mean that Morrisons will be supplying over 1,700 convenience stores with branded and own-brand products.

- 3.19 Whilst the 'Big Four' have largely experienced difficult trading conditions in recent years, the German owned discount food retailers, Aldi and Lidl, have increased their collective market share from 6.6% in June 2013 to 12.8% in August 2020. Aldi overtook Co-Op in 2017 to become the UK's fifth biggest supermarket and now have a market share of 7.9%. Aldi and Lidl's specific business models enable them to offer high quality food items at low prices and they are continuing to expand with further store openings planned across the country. Aldi have also recently opened their first '*Aldi Local*' store in South London, which is a smaller format store for urban environments which will stock approximately 300 fewer product lines than a standard Aldi store.
- 3.20 The changing habits of consumers with a move away from large weekly shops to more frequent 'basket' shopping trips has also led in recent years to many of the main retailers investing in smaller format C-stores such as Tesco Express, Sainsburys Local and Little Waitrose.
- 3.21 The Covid-19 pandemic has seen supermarkets experienced unprecedented sales growth, which has been the highest since records began in 1994. Morrisons saw the strongest growth of the Big Four during this period, which saw them gain market share for the first time since 2015. Tesco sales rose by 15.1%, Sainsburys by 13.5% and ASDA by 11.0%. Online sales accounted for 13% of all grocery sales, up from 7.4% in March. Aldi and Lidl lost some market share during this period, largely attributable to their limited online offer. This sales growth has slowed slightly as households begin to emerge from lockdown restrictions, however, it is anticipated that strong sales for supermarkets are likely to continue due to continued worries surrounding Covid-19.

Non-Food Retailing

- 3.22 There have been fundamental changes in the retail sector in recent years, influenced heavily by the global economic crisis and the growth in on-line retailing. These changes have led to changing shopping habits amongst consumers with knock-on implications on the space requirements of individual retailers. There is no longer a need for retailers to be represented in every town in order to achieve national coverage and retailers are increasingly focusing investment on flagship stores in prime locations, supplemented by smaller satellite stores and an on-line offer. The prime sub-regional towns and cities are continuing to attract key retailers, however, the middle ground towns are being squeezed and are potentially struggling to attract investment — often leaking trade to the more dominant centres and having lost a number of multiples and anchor units during the recession. Recent years have seen a number of high profile non-food retailers failing or undertaking significant restructuring, including Mothercare, House of Fraser, New Look, Debenhams and Toys 'R Us. As part of this restructuring, a number of the retailers in question have announced the closure of unprofitable stores, which are often located within the secondary or middle ground towns.
- 3.23 The strong, more dominant centres are getting stronger and the polarisation of retail between large destination malls / centres and secondary High Streets is increasing. Local and neighbourhood centres are less affected; offering convenience, day-to-day needs and top-up shopping.
- 3.24 The comparison goods market has become more competitive, in the same way as convenience goods, as consumers look for the best offers, which has meant the discount non-food sector has performed strongly in recent years. Although there remains a strong market for high value comparison goods, the market for lower-priced comparison goods shopping has grown during the recession and is expected to continue performing strongly.

- 3.25 In clothes shopping, Primark has expanded rapidly in the last decade. Other retailers have benefitted from the trend towards best value in non-food shopping, as consumers seek value for money in a competitive market. B&M Stores has been one of the fastest growing businesses in this market. Poundland has also gained in popularity in the discount field as more shoppers look for value products. Wilkinsons (now Wilko) has made recent growth by concentrating on household products, including home-brand items. These trends suggest that there will be further polarisation of comparison goods shopping in the future between different types of centres, with the secondary centres concentrating more on lower value comparison goods. Discount non-food shopping is likely to be a strong feature in the survival of smaller town centres.
- 3.26 However, the discount non-food sector is not immune from the current challenges facing high streets across the country, with Poundworld falling into administration in 2018 and the Original Factory Shop having agreed a CVA, which will lead to the closure of a number of stores across the country.
- 3.27 High streets and town centres across the UK have therefore been facing significant challenges and the COVID-19 pandemic has placed an increased burden on shops and businesses, with non-essential businesses having to close during lockdown and others having to adapt to continue operating, with footfall across the UK's high streets down approximately 81% during lockdown. It is estimated that approximately 24,348 jobs were lost in the retail sector alone in the first half of 2020 and it is expected that this figure will continue to rise as further retailers enter administration or undergo further restructuring in response to the economic impact of the pandemic. Footfall across high streets is struggling to return to pre-lockdown levels as lockdown restrictions are being eased and a number of major retail and leisure operators have announced that they are highly unlikely to re-open all their outlets.



Section 4:

Future Requirements for Retail Floorspace

4. Future Requirements for Retail Floorspace

- 4.1 Assessing future shopping needs requires a quantitative analysis of existing shopping patterns in the study area including the amount of retail expenditure generated by local residents and where that expenditure is spent in centres and stores within the study area and elsewhere. From this base analysis, it is necessary to make forecasts of expenditure in the future, how much of the expenditure growth may be taken by existing centres and stores, and how much surplus capacity is available to support additional shopping floorspace. This section of the report makes an assessment of future shopping needs in North Lincolnshire.

Existing Population and Retail Expenditure

- 4.2 Data on existing population and retail expenditure in the North Lincolnshire study area is available from a specially commissioned Experian Retail Planner report, which provides detailed data for 7 zones. These are the same zones that were defined in the 2005 Retail Study. A map of the study area and zones is included in Figure 4.1 contained overleaf.

convenience goods and 15.6% for comparison goods using Experian's estimates of special forms of trading adjusted to allow for SFT sales made through stores.

4.5 Appendix 1 (Tables 4 & 5) shows the amount of convenience and comparison goods expenditure by zone in 2017, excluding SFT, combining the data on population and expenditure per person. Total convenience expenditure in the study area in 2017 is £368.55m and total comparison expenditure is £492.03m.

4.6 Appendix 1 also includes estimates of population and expenditure in the study area by zone in 2019 and forecasts for the years 2025, 2030 and 2038. Details are given later in this section of the report.

Household Survey: Existing Shopping Patterns

4.7 In order to analyse shopping patterns in North Lincolnshire for both convenience and comparison goods, a telephone household survey was commissioned by ELG Planning and undertaken by a specialist company (NEMS Market Research). The survey was carried out in April and May 2019 and comprised 1,000 interviews, with 250 interviews in the largest zone (Zone 2) and 125 interviews in each of the other six zones. The survey data has been weighted by NEMS so that the results reflect the distribution of population across all the zones.

4.8 The household survey has collected information on both convenience and comparison shopping behaviour and residents' views on existing shopping provision, deficiencies and the need for improvements. The topics included on shopping are:

- Stores used for main food and grocery shopping;

- Opinions of stores used for main food and grocery shopping
- Mode of travel for main food shopping
- Shops used for top-up food shopping
- Use of the Internet for main and top-up food shopping
- Share of food and grocery expenditure spent on main food shopping
- Linked trips: other activities carried out on main food shopping trips
- Centres used for shopping for clothing and footwear, electrical goods, books and stationery, recreational goods, furniture and carpets, DIY goods, goods for personal care and other non-food goods
- Satisfaction with shopping in Scunthorpe town centre and changes/improvements needed in the centre
- Satisfaction with shopping in other main centres (Barton-upon-Humber, Brigg, Crowle, Epworth, Kirton-in-Lindsey, Winterton, Ashby and Frodingham Road) and the most important changes and improvements needed in these centres

4.9 The survey also asked about residents' use of leisure attractions including bingo, cinema, gym, theatre, museum, pubs, restaurants and family entertainment venues.

4.10 The full household survey results are included in Appendix 2.

Convenience Goods Shopping

4.11 Appendix 3 extracts the household survey details of the stores used for main food and grocery shopping and top-up food shopping by zone. The percentages of shopping to different stores and centres by zone are applied to the amount of expenditure in each zone for main and top-up food shopping

separately. The market shares of food spending have been adjusted to exclude food bought via the Internet and 'don't know' responses. To estimate expenditure flows and turnover in 2019 to correspond with the date of the household survey, the expenditure data has been projected from 2017 to 2019 values. Appendix 3 shows the expenditure flows for main and top-up food shopping and all convenience goods in 2019. The estimated expenditure flows to each centre and store are grouped into the main urban areas in the study area to provide turnover estimates for all convenience goods.

- 4.12 The household survey shows that the destinations with the largest market shares for convenience goods shopping are Asda, Burringham Road (12%); Tesco, Gallagher Retail Park Park (11%) and Morrisons, Lakeside Retail Park (11%). Other stores with a relatively high market share for convenience goods shopping are Aldi, Glebe Road (8%); Tesco, Brigg (6%); Aldi, Ashby (5%); Sainsburys, Doncaster (5%); and Tesco, Barton (5%).
- 4.13 Overall, 73% of spending on food shopping is spent on main food and grocery shopping. Main food shopping is done predominantly by car (89%). Internet / home delivery main food and grocery shopping is carried out mostly at Asda (36%) and Tesco (36%) in Scunthorpe. Asda is the store used predominantly (81%) for Internet / home delivery top-up food shopping.
- 4.14 The survey asked what else people usually do on the same trip as their main food shop. 36% of people said they do other things as a linked trip, mostly for non-food shopping. Linked trips are mostly (33%) to Scunthorpe town centre.

Comparison Goods Shopping

- 4.15 Questions were included in the household survey on patterns of shopping for non-food (comparison) goods. Respondents were asked which centre they mainly go to for 8 category types of non-food goods – clothing and footwear; electrical goods; books and stationery; recreational goods; furniture and carpets; DIY goods; goods for personal care; and other non-food goods. Appendix 4 extracts details of these categories of comparison goods expenditure by zone.
- 4.16 The percentages of shopping to different centres and other retail destinations by zone are applied to the amount of expenditure in each zone for each of the different categories of non-food shopping separately. Appendix 4 shows the expenditure flows for each category of comparison goods based on 2017 expenditure estimates, and the data is aggregated for all comparison goods. Internet shopping is excluded. The estimated expenditure flows to each centre and retail destination are grouped into the main urban areas in the study area to provide turnover estimates for all comparison goods in 2017. A growth factor has been applied to estimate the turnover of centres and other retail destinations in 2019 based on data in Experian Retail Planner Briefing Note 17 (RPBN17).
- 4.17 Scunthorpe urban area has the largest market share of comparison goods turnover, representing 86.8% of all comparison turnover in the study area. Scunthorpe town centre is the centre most used for comparison goods shopping followed by Lakeside Retail Park / Morrisons and Gallagher Retail Park / Tesco. Outside the Scunthorpe urban area, the largest market shares of comparison goods turnover are in Barton-upon-Humber (4.9%), Brigg (4.8%) and Ashby (2.6%).
- 4.18 It should be noted that the study area retains only 79% of the comparison goods expenditure generated in 2017. There is a significant leakage of comparison spending to Hull City Centre, Grimsby Town Centre,

Doncaster Town Centre and Meadowhall. In addition, 25% of respondents said that they mainly do comparison goods shopping via the Internet. Internet shopping is particularly well used for books and stationery (47%); recreational goods (43%); electrical goods (35%); and clothing and footwear (34%).

Catchment Areas

- 4.19 Appendix 3 shows that the main foodstores in Scunthorpe (Asda, Tesco, Morrisons and Sainsburys) attract trade from all parts of the study area but to a more limited extent from the Barton, Brigg and Epworth / Crowle zones. The Tesco stores in Barton and Brigg draw their trade predominantly from their respective zones.
- 4.20 Appendix 4 shows that Scunthorpe Town Centre is the dominant centre for non-food shopping across the study area but with a limited trade draw from the Barton zone. The same is true of the Lakeside and Gallagher Retail Parks, and the Asda and Tesco stores in Scunthorpe. Barton-upon-Humber and Brigg Town Centres draw comparison goods trade predominantly from their respective zones.
- 4.21 The analysis of shopping patterns enables catchment areas to be defined for all the main centres for convenience and comparison goods. The catchment areas are defined by the survey zones. In each case they capture at least 80% of the trade going to each centre, and in most cases over 90%.
- 4.22 For the purposes of the capacity analysis, it is necessary to include all the turnover in each of the catchment areas to assess how much of the expenditure generated is retained within the catchment (the retention level). Therefore, the turnover of the Scunthorpe catchment area includes trade in the large foodstores outside the town centre, as well as the retail parks and Ashby and Frodingham Road District Centres. The catchment areas of Epworth and Crowle are combined because the two centres

are located in the same zone. The Scunthorpe catchment area is larger for comparison goods than convenience goods, comprising all of the study area except for Zone 4 (Barton-upon-Humber). Barton residents visit Hull to a greater extent than Scunthorpe for comparison shopping.

4.23 The following table sets out the definition of the catchment areas in terms of zones.

Table 4.1: Catchment Areas

Catchment Area	Convenience Goods Zones	Comparison Goods Zones
Scunthorpe	1, 2, 3, 6	1, 2, 3, 5, 6, 7
Barton-upon-Humber	4	4
Brigg	5	5
Epworth / Crowle	7	7
Kirton-in-Lindsey	6	6
Winterton	3	3
Ashby	2	2
Frodingham Road	1	1

Estimated Turnover of Centres

4.24 The analysis of expenditure flows outlined earlier provides the basis for the estimates of turnover in centres, stores and retail parks in the study area in 2019. The turnovers are based on data from the household survey on shopping patterns and so they will exclude any trade flowing into the study area from outside. The turnover estimates are shown below for convenience and comparison goods and

they are compared with the turnover estimates for 2005 in the 2005 Retail Study. The 2005 turnovers have been adjusted to 2017 prices for consistency with the 2019 turnover estimates.

Table 4.2: Convenience Goods Turnover (£ million)

	2005 (in 2001 prices)	2005 (in 2017 prices)	2019 (in 2017 prices)
Scunthorpe Town Centre	13.31	21.93	13.07
Ashby High Street	6.00	9.89	14.15
Barton-upon-Humber	11.05	18.21	34.37
Brigg	23.18	38.20	38.39
Epworth	5.18	8.54	7.63
Kirton-in-Lindsey	5.91	9.74	3.61
Asda, Scunthorpe	36.26	59.76	43.66
Sainsburys, Scunthorpe	7.87	12.97	19.13
Morrisons, Scunthorpe	47.82	78.81	39.73
Tesco, Scunthorpe	38.72	63.81	39.94
Other Shops in the Study Area	20.27	33.40	80.62
Total Turnover from Study Area	215.57	355.26	334.30

4.25 Overall, there has been a slight decline in convenience goods turnover in the study area between 2005 and 2019. This decline is particularly evident in the larger foodstores in Scunthorpe – Asda, Morrisons and Tesco. Convenience trade has also decreased in Scunthorpe Town Centre by 40%. However, Ashby High Street, Barton-upon-Humber and Sainsburys in Scunthorpe have seen an increase in convenience turnover. The other significant change in convenience trade is the increase in turnover in other shops outside the main centres, which includes the Aldi stores at Glebe Road, Scunthorpe and in Ashby.

Table 4.3: Comparison Goods Turnover (£ million)

	2005 (in 2001 prices)	2005 (in 2017 prices)	2019 (in 2017 prices)
Scunthorpe Town Centre	166.55	135.41	102.27
Ashby High Street	4.36	3.54	4.82
Brigg	9.72	7.90	8.06
Barton-upon-Humber	5.65	4.59	8.63
Skippingdale Retail Park	3.44	2.80	6.27
Lakeside Retail Park	43.31	35.21	44.37
Gallagher Retail Park	10.45	8.50	35.00
Other Shops	2.91	2.37	45.25
Total Turnover from Study Area	246.39	200.32	254.67

4.26 Unlike the trend in convenience trade, there has been an overall increase in comparison goods turnover in the study area between 2005 and 2019. The largest increase has been in other shops outside the main centres but it is likely that the 2005 estimate for these shops is under-represented. This increase takes account of the opening of the North Lincolnshire Shopping Park. The Lakeside and Gallagher Retail Parks have also increased their turnover. The 2019 figure for Gallagher Retail Park includes comparison trade in the Tesco store. Notably, comparison goods turnover in Scunthorpe Town Centre has declined by 24% since 2005.

Expenditure Forecasts

- 4.27 Appendix 1 (Tables 4 and 5) presents the forecasts of future expenditure in the study area and seven zones. The expenditure forecasts are based on population forecasts by zone and the latest Experian forecasts of expenditure growth per person.
- 4.28 Total population in the study area is forecast to increase from 179,500 in 2017 to 185,500 in 2038. This growth forecast is derived from the ONS 2018-based population projections for North Lincolnshire. The overall growth of 6,000 between 2017 and 2038 is allocated between zones for each time period to 2019, 2025, 2030 and 2038 pro rata to the Council's planned distribution of housing development across the Local Plan period. 50% of the housing and population growth is assumed to be in Zones 1 and 2 (Scunthorpe Urban Area), with the next highest allocation of 18% of growth in Zone 4 (Barton-upon-Humber) and 18% in Zone 5 (Brigg). Although the Lincolnshire Lakes housing development is geographically in Zone 3, for the purposes of the expenditure analysis it is assumed to form part of the Scunthorpe urban area. No population growth is assumed in those parts of Zones 5 and 6 lying outside North Lincolnshire
- 4.29 Retail expenditure per person is forecast to increase at the rates shown in RPBN17. The growth of expenditure has been adjusted by Experian to exclude special forms of trading such as Internet shopping and allowing for SFT sales via stores. In convenience goods, it is forecast that the annual average growth rate will be -0.1% up to 2026, then zero annual growth between 2026 and 2038 because of the trend towards increased Internet shopping and home delivery for food items. In comparison goods, the forecast annual average growth rates are 2.3% up to 2026, then 2.7% between 2026 and 2038.

4.30 Multiplying population and expenditure per person by zone, the total amount of expenditure on convenience and comparison goods in the study area over the Plan period is shown in the table below. Details by zone are shown in Appendix 1 (Tables 4 & 5).

Table 4.4: Retail Expenditure Forecasts, North Lincolnshire Study Area (£ million)

	2017	2019	2025	2030	2038
Convenience Goods	368.55	370.41	372.08	373.13	375.72
Comparison Goods	492.03	520.06	602.33	688.75	858.22

4.31 The growth in expenditure on convenience goods in the study area between 2017 and 2038 is just 1.9% but the projected growth in total comparison goods is 74.4%.

Capacity Analysis

Methodology

4.32 The capacity analysis adopts a conventional methodology which is consistent with national planning practice guidance. The steps in the methodology are as follows:

- Forecast expenditure on convenience and comparison goods for each time period between 2017 and 2038 for the catchment areas of the main centres in the study area;
- Compare total expenditure in each catchment area with the total amount of existing turnover in the catchment area, using data for the base year of 2019;
- Calculate the retention level for the base year 2019;

- Apply the assumed future retention level to the forecast amount of expenditure in each catchment area for each of the future time periods to calculate the amount of expenditure retained in each forecast year;
- Subtract the estimated turnover of existing shops in the catchment area from the amount of expenditure retained to calculate surplus expenditure capacity;
- Apply a sales density to the surplus capacity to calculate floorspace capacity in each forecast year;
- Subtract any commitments for new floorspace from the floorspace capacity to derive residual floorspace capacity.

4.33 For the purposes of this Retail Study, it is assumed that there will be no increases in the retention level for convenience goods in any of the catchment areas. For comparison goods, it is again assumed that there will be no increase in any of the retention levels except in the Scunthorpe catchment area where a small increase is assumed from 50.7% to 52%. The future turnover of existing shops is projected to increase to allow for growth in sales density estimated by Experian in RPBN17, reflecting an on-going trend of increased sales productivity which is relatively small in convenience goods but greater in comparison goods.

Floorspace Capacity

4.34 In calculating floorspace capacity, the sales densities for each year are based on the latest Experian projections. For consistency with the data in this Retail Study, the figures have been converted from square feet to square metres and from 2012 to 2017 prices. The sales densities are expressed in £/square metre of gross floorspace. All the floorspace capacity figures are in terms of gross floorspace.

- 4.35 The only commitments that need to be allowed for in terms of floorspace capacity are the approval of a Lidl store in Dudley Road, Scunthorpe (convenience and comparison floorspace) in the Scunthorpe and Ashby catchment areas, an increase in floorspace of the new Aldi store in Brigg, a small foodstore in Scawby in the Brigg catchment area and new retail units adjacent to Morrisons at Lakeside, assumed to be used for comparison goods. Other recent commitments have been implemented, notably the Lidl store in Barton-upon-Humber, which is included in the analysis of existing shopping patterns.
- 4.36 Details of the capacity analysis for each catchment area are presented in Appendix 6 for convenience goods and Appendix 7 for comparison goods.

Alternative Forecasts

- 4.37 The capacity analysis set out in Appendix 6 for convenience goods and Appendix 7 for comparison goods is based on the forecasts of expenditure growth, non-store retailing and sales productivity shown in Experian RPN17 published in February 2020. Since March 2020 the retail sector and the UK economy as a whole have been very significantly affected by the Covid-19 pandemic. It has had a dramatic impact on shops and spending patterns, as shown by the closure of numerous retailers and indications of poor retail prospects, at least in the short term. In order to take account of the implications for future requirements for retail floorspace in the North Lincolnshire study area, ELG Planning has prepared alternative forecasts of the main variables that influence retail expenditure and future trade in centres. These alternative forecasts are included in Appendix 5.
- 4.38 The rationale behind the alternative forecasts is that retailing has experienced a downturn in 2020 which will have a bearing on future levels of expenditure. The short term effects are likely to be

significant. It is expected that there will be a recovery in the national economy and in the retail market but the timing is uncertain. To allow for the effects of this downturn it is assumed that:

- i. Expenditure per head will be lower in 2020 but there will be a large increase in the proportion of retail spending on Internet shopping.
- ii. Turnover in centres will also be lower in 2020 and Experian's estimates of retail sales growth in the short term need to be revised downwards.
- iii. There will be no increase in convenience and comparison goods turnover in existing centres and stores from the 2019 base figures but in comparison goods there will be a return to the Experian growth forecasts of sales growth from 2025 onwards.

4.39 The overall forecasts of retail expenditure growth in RPBN17 are accepted but different assumptions have been made about the proportions of retail spending via Special Forms of Trading (SFT) or non-store retail sales. Appendix 5 (Table 1) shows that in 2019 non-store retailing adjusted for SFT sales from stores accounted for 4.2% of convenience goods spending and 17.6% of comparison goods spending, both higher than in 2017. By 2020 these proportions were projected to be 4.5% and 18.4%. As a result of the Covid-19 pandemic it has been reported by the Office for National Statistics (ONS) that Internet sales as a proportion of all retailing increased between June 2019 and June 2020 by 6.0 percentage points for predominantly food stores. For predominantly non-food stores and other non-store retailing the increases were 17.4 and 2.2 percentage points respectively. The weighted average for non-food retailing combined is 6.7%.

4.40 Appendix 5 (Table 2) applies these increases in the proportions of non-store retail sales to revise Experian's estimates of spending growth in 2020 excluding SFT adjusted for sales via stores. A gradual return to Experian's annual growth rates is forecast by 2022. This is informed by the forecasts of the

Centre for Retail Research in July 2020 that total retail sales in the UK would decrease by 4.8% in 2020 then increase by 2.4% in 2021. The figure of 2.4% is consistent with Experian's estimates for all retail in 2021 (RPBN17 Figure 1a). The population forecasts in Table 3 are unchanged from those in Appendix 1. The revised growth rates are used in Tables 4 and 5 to calculate future expenditure per head in convenience and comparison goods based on these alternative forecasts. Tables 6 and 7 then calculate total future expenditure assuming lower expenditure growth.

- 4.41 The future turnover levels in centres are based on assumptions about increases in sales density in RPBN17. Experian forecast a small increase in sales density for convenience goods shops up to 2025, followed by zero growth. ELG assume that there will be no increase in convenience goods turnover in existing centres from the 2019 base figures. Experian forecast an increase in sales density for comparison goods shops of 2.6% p.a. until 2021, then 3.2% p.a. until 2026 and 2.7% p.a. thereafter. ELG assume that there will be no increase in comparison goods turnover in existing centres from 2019 until 2025, after which the Experian growth forecasts are followed. These assumptions reflect the short term downturn in sales in traditional floorspace rather than Internet shopping, which is particularly evident in comparison goods.
- 4.42 Appendix 8 sets out the revised capacity analysis for convenience goods and Appendix 9 for comparison goods based on ELG's alternative forecasts.

Summary

- 4.43 In summary, the capacity for additional shopping floorspace in the study area is shown in Tables 4.5 and 4.6. The range of figures represent the differences between the Experian central case forecasts based on RPBN17 and ELG's alternative forecasts shown in Appendices 8 and 9. The floorspace figures have been rounded.

Table 4.5: Floorspace Capacity - Convenience Goods (sq. metres gross)

Catchment Area	2025	2030	2038
Scunthorpe	-	-	-
Barton-upon-Humber	0 - 20	0 - 40	0 - 70
Brigg	-	-	-
Epworth & Crowle	-	-	0 - 10
Kirton-in-Lindsey	0 - 20	0 - 20	0 - 20
Winterton	-	-	-
Ashby	0 - 120	0 - 140	0 - 190
Frodingham Road	10	10	10

Table 4.6: Floorspace Capacity - Comparison Goods (sq. metres gross)

Catchment Area	2025	2030	2038
Scunthorpe	-	0 - 260	0 - 1,240
Barton-upon-Humber	100 - 120	0 - 100	0 - 140
Brigg	0 - 200	0 - 180	0 - 250
Epworth & Crowle	10 - 40	10 - 30	10 - 40
Kirton-in-Lindsey	10 - 20	10 - 20	20
Winterton	10	10	10
Ashby	-	-	-
Frodingham Road	-	-	-

Commentary on the Capacity Analysis

- 4.44 There is very little capacity for additional convenience goods floorspace in any of the catchment areas because of the low rate of growth in convenience goods spending and the allowance that has been made for commitments for new floorspace. In comparison goods there is a greater capacity but it is still small in relation to the size of the main shopping centres.
- 4.45 Throughout the period to 2038 there is no floorspace capacity for convenience shopping in the Scunthorpe, Brigg and Winterton catchment areas and there is very limited floorspace capacity in the Barton-upon-Humber, Epworth/Crowle, Kirton-in-Lindsey, Ashby and Frodingham Road catchment areas. Any available capacity in the Scunthorpe and Brigg catchments is taken up by commitments.
- 4.46 Throughout the period to 2038 there is no floorspace capacity for comparison shopping in the Ashby catchment area because any available capacity is taken up by commitments and there is no capacity in the Frodingham Road catchment. There is some capacity in the Scunthorpe catchment area in the longer term after allowing for commitments. There is limited floorspace capacity in the Barton-upon-Humber and Brigg catchment areas and a smaller capacity in the Epworth/Crowle, Kirton-in-Lindsey and Winterton catchment areas.
- 4.47 The effect of using alternative forecasts in the capacity analysis is not as great as may have been expected. Although expenditure growth is lower in the alternative forecasts, the increase in turnover of existing centres and stores is also lower as it is assumed that Internet shopping will take a much larger share of retail sales in the future.
- 4.48 The lack of capacity is partly due to the fact that no increases are assumed in the retention level for any of the centres / catchments except for a small increase in comparison goods retention in the

Scunthorpe catchment. Significantly, there is no estimated capacity for additional retail floorspace in Scunthorpe Town Centre in the short term but a small capacity for comparison goods floorspace in the longer term. The floorspace capacity figures represent the *'theoretical'* capacity assuming no changes in the market shares of centres in the future. The analysis is *'theoretical'* because, in reality, the relative attraction of centres may change as new development takes place. For instance, the Lincolnshire Lakes development may create a localised need for new retail floorspace which in turn may help to increase the retention level in the Scunthorpe catchment area. The most likely prospect is that the Scunthorpe catchment area will be able to support a higher retention level as Scunthorpe town centre and the retail parks in Scunthorpe urban area increase their attraction and market share compared with other centres in the study area.

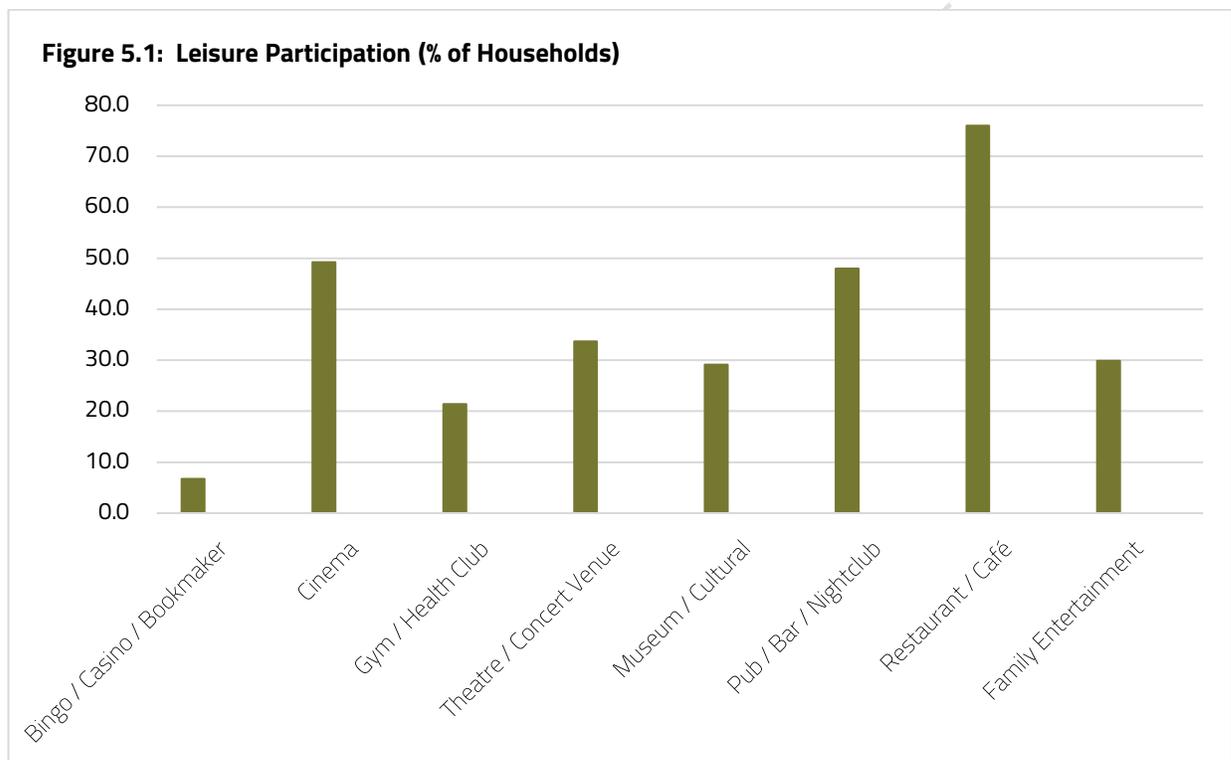


Section 5:

Future Requirements for Other Main Town Centre Uses

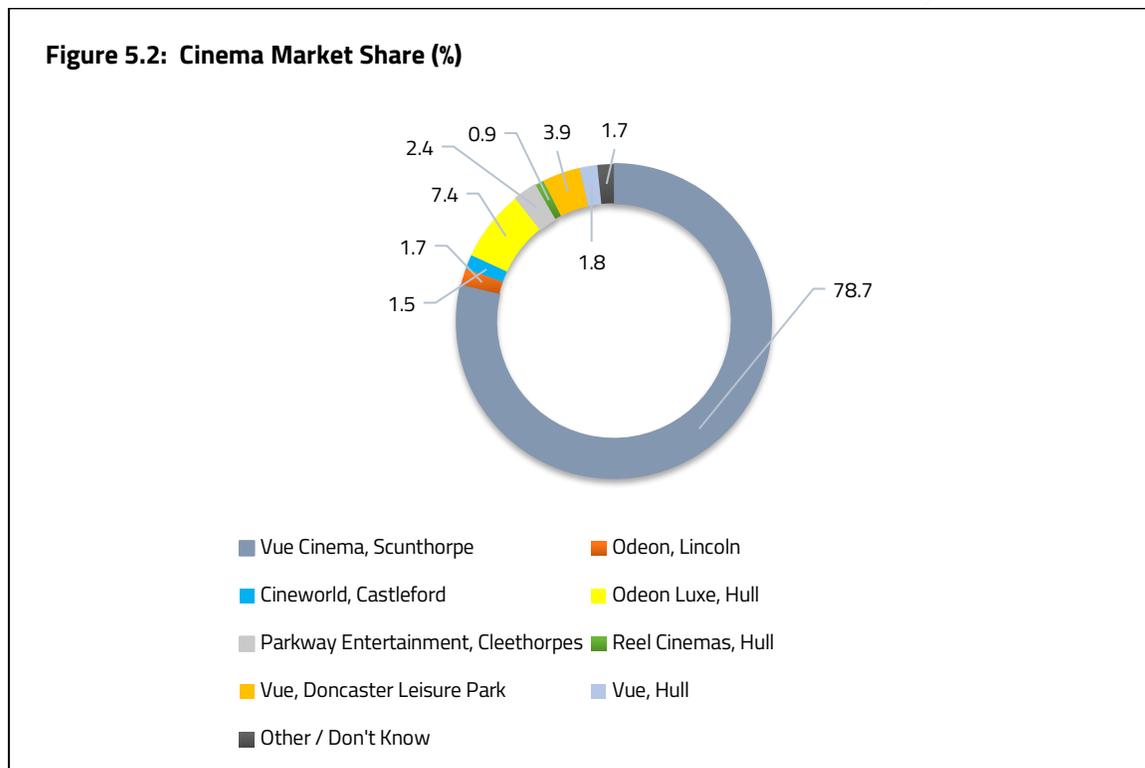
5. Future Requirements for Other Main Town Centre Uses

5.1 This section of the study assesses future requirements for commercial leisure and other main town centre uses across North Lincolnshire. The assessment will focus on a range of commercial leisure use that contribute to the vitality and viability of individual centres, including cinemas; indoor family entertainment centres; health and fitness facilities; food and beverage uses; museums, galleries and places of cultural interest; and theatres, concert halls and live music venues. The participation rates in these activities within the Study Area are highlighted in Figure 5.1.



Cinemas

- 5.2 The existing cinema provision within North Lincolnshire comprises of the 7-screen Vue cinema within the Parishes Shopping Centre in Scunthorpe Town Centre, which provides in excess of 1,500 seats. The household survey identifies that 49.2% of respondents visit the cinema, with the majority visiting between once a month or every three months. The Vue cinema in Scunthorpe Town Centre captures 78.7% of cinema trips from within the Study Area. Other cinemas visited by respondents include Odeon Luxe, Hull (7.4% market share); Vue, Doncaster Leisure Park (3.9%); Parkway Entertainment, Cleethorpes (2.4%) and Vue, Hull (1.8%).



- 5.3 In order to assess the quantitative need for additional cinema screens across North Lincolnshire over the Plan period, we have sought to convert the forecast population of the Study Area into a total number

of screens based on the current national average. There were a total of 4,399¹ cinema screens across the UK in 2018, which equates to 15,013 people per screen based on a total UK population of 66.0 million². The cinema screen requirement across the Study Area is therefore calculated as follows:

Table 5.1: Cinema Screen Requirement

	2017	2019	2020	2025	2030	2038
Study Area Population	179,500	180,800	181,300	183,300	184,200	185,500
Screen Potential ¹	12.0	12.0	12.1	12.2	12.3	12.4
Existing Screens in Study Area	7	7	7	7	7	7
Existing Commitments	-	-	-	-	-	-
Screen Requirement	5.0	5.0	5.1	5.2	5.3	5.4

¹ Population / 15,013 people per screen

5.4 The analysis suggests that there is an underprovision of cinema screens across North Lincolnshire over the Plan period, however, it is not considered that there is a need to proactively plan for new provision. However, any proposals for new cinema provision that come forward should be judged on their own merits in accordance with prevailing policies on main town centre use development. In particular, a number of boutique operators such as Everyman and Curzon have entered the market in recent years with a diversified offer to appeal to different cinemagoers. The boutique operators are attempting to differentiate themselves from the standard format of the national operators by providing premium seating, fully-licensed bars, a quality food offer with table / seat service and a diverse film offer, including regular film festivals. It is considered that such provision, subject to operator interest, would help broaden the offer and increase the attractiveness of Scunthorpe Town Centre as a leisure destination.

¹ UK Cinema Screens Association

² ONS UK Population Mid-Year Estimate (28th June 2018)

Family Entertainment Centres

- 5.5 The household survey identifies that 29.9% of respondents visit family entertainment centres, with venues within the North Lincolnshire administrative boundary capturing over 65% of market share. The most popular venues are Scunthorpe Bowl; Ashby Ten Pin Bowling Centre; and Tenpin, Bawtry Road, Doncaster; which attract 33.0%, 18.8% and 6.3% of market share respectively. The most popular non-tenpin bowling facility is Air Kings Trampoline Park in Scunthorpe, which attracts 5.6% of the family entertainment centre market share.

Ten Pin Bowling

- 5.6 The existing ten pin bowling provision in the Study Area comprises of the 20-lane Scunthorpe Bowl and 12-lane Ashby Ten Pin Bowling Centre and the household survey identifies that ten pin bowling facilities are the most popular form of indoor entertainment venue amongst respondents, with the existing bowling alleys within North Lincolnshire capturing over 50% of overall family entertainment centre market share. Scunthorpe Bowl and Ashby Ten Pin Bowling Centre collectively attract 81.4% of all family entertainment visits from residents in Zone 1, 63.5% from Zone 2, 65.8% from Zone 3, 13.9% from Zone 4, 49.0% from Zone 5, 47.9% from Zone 6 and 58.5% from Zone 7.
- 5.7 There are a total of 5,300³ bowling lanes in the UK, equating to one lane per 12,460 people based on a total UK population of 66.0 million. In order to assess the quantitative need for further ten pin bowling facilities in the Study Area, we have sought to apply the UK average lane per person to the forecast population in the Study Area, as detailed within Table 5.2:

³ Tenpin Bowling Proprietors Association

Table 5.2: Ten Pin Bowling Requirement

	2017	2019	2020	2025	2030	2038
Study Area Population	179,500	180,800	181,300	183,300	184,200	185,500
Bowling Lane Potential ¹	14.4	14.5	14.6	14.7	14.8	14.9
Existing Lanes in Study Area	32	32	32	32	32	32
Lane Requirement	-17.6	-17.5	-17.4	-17.3	-17.2	-17.1

¹ Population / 12,460 per lane

- 5.8 It is therefore apparent that there is an oversupply of bowling lanes across the Study Area in quantitative terms and, accordingly, there is no requirement in quantitative terms for the LPA to proactively plan for further ten pin bowling facilities over the Plan period. We would advise that, should proposals come forward for additional ten pin bowling facilities, they should be judged on their own merits in accordance with prevailing policies on main town centre use development.

Bingo Halls

- 5.9 There is a single large-scale bingo hall in North Lincolnshire, which is the Buzz Bingo unit on Brigg Road in Scunthorpe.
- 5.10 The bingo sector saw a significant decline in visits between 2005 and 2014, having been affected by the introduction of the smoking ban, the onset of the recession and the growth of online bingo sites such as Tombola and Foxy Bingo. However, there have been a number of new openings across the Country in recent years, including established and new operators in the sector providing smaller clubs providing a wider offer aimed at a new generation of younger players, including the provision of gaming machines, separate lounges, music and entertainment, as well as a food and drink offer.

5.11 There were a total of 644 bingo halls⁴ in December 2018, equating to one bingo hall per 102,547 people based on the UK population of 66.0 million. In order to assess the need for further bingo hall facilities in the Study Area, we have sought to convert the forecast population of the Study Area into a total number of bingo halls based on the current national average, as follows:

Table 5.3: Bingo Hall Requirement

	2017	2019	2020	2025	2030	2038
Study Area Population	179,500	180,800	181,300	183,300	184,200	185,500
Bingo Hall Potential ¹	1.8	1.8	1.8	1.8	1.8	1.8
Existing Bingo Halls in Study Area	1	1	1	1	1	1
Bingo Hall Requirement	0.8	0.8	0.8	0.8	0.8	0.8

¹ Population / 102,547 people per Bingo Hall

5.12 There is therefore a marginal undersupply of bingo facilities based on the current national average, however, it is again not considered that there is a need to proactively plan for further bingo hall facilities and, should any such proposals come forward, they should be judged on their own merits in accordance with prevailing policies on main town centre use development.

Health & Fitness

5.13 There are a number of health and fitness facilities located across the Study Area, although the gym provision mainly comprises of independent operators with limited representation from large format national operators. There are also a number of Council operated leisure centres across North Lincolnshire, as follows:

- The Pods, Scunthorpe;
- Ancholme Leisure Centre, Brigg;

⁴ UK Gambling Commission

- Epworth Leisure Centre, Epworth;
- Baysgarth Leisure Centre, Barton-upon-Humber;
- Riddings Pool, Scunthorpe;
- Axholme North Leisure Centre, Crowle;
- Winterton Gym, Winterton

5.14 The household survey identifies a 21.4% participation rate in health and fitness activities with over 70% of health and fitness trips retained within the Study Area, which indicates that people generally tend to look towards destinations close to home for health and fitness activities. The household survey indicates that the most popular health and fitness facility in the Study Area is The Pods, which attracts 30.3% of all trips, followed by Reso24 Health Club, Scunthorpe (7.6%), Axholme North Leisure Centre (6.4%), Ancholme Leisure Centre (6.0%) and Forest Pines Hotel, Brigg (6.0%).

5.15 The *'State of the UK Fitness Industry Report'* (2018) prepared by the Leisure Database Company estimates that the average number of members per health and fitness facility is 1,407, although larger national fitness chains and budget chains tend to have higher membership numbers on average. The requirement for new gym facilities over the Plan period is set out below assuming membership rates in line with the national average and that participation rates remain constant to 2038.

Table 5.4: Gym Requirement

		2017	2019	2020	2025	2030	2038
1.	Study Area Population	179,500	180,800	181,300	183,300	184,200	185,500
2.	Participation Rate	21.4%	21.4%	21.4%	21.4%	21.4%	21.4%
3.	Total Participants	38,413	38,691	38,798	39,226	39,419	39,697
4.	Increase in Participants from 2017 Base	-	278	385	813	1,066	1,284
5.	Average Members per Club	-	1,407	1,407	1,407	1,407	1,407
6.	New Gym Requirement (4 / 5)	-	0.20	0.27	0.58	0.76	0.91

- 5.16 The analysis therefore identifies that there is limited capacity for new gym provision over the Plan period and any proposals that come forward should be judged on their own merits in line with prevailing policies on main town centre use development.

Food & Beverage Uses

- 5.17 The food and beverage sector forms an increasingly important component of the overall offer of town centres throughout the UK, with such uses helping to increase footfall, lengthen '*dwell*' times and increase expenditure in centres. Eating and drinking out continues to dominate average household spending on commercial leisure services in the UK.
- 5.18 The total food and beverage expenditure in the Study Area is £196.35m in 2017, as shown in Appendix 7 (Table 3), and is expected to grow to £255.06m in 2038, which represents a 29.9% increase. The household survey identifies that destinations within the Study Area capture approximately 73% of food and beverage trips within North Lincolnshire and the table contained below illustrates the total food and beverage market share of each main town.

Table 5.5: Food & Beverage Market Shares (2019)

Centre	% Market Share (2019)
Scunthorpe Town Centre	31.8%
Brigg Town Centre	11.4%
Barton-upon-Humber Town Centre	6.4%
Epworth	5.0%
Ashby High Street	2.3%
Crowle	2.1%
Winterton	1.5%
Kirton-in-Lindsey	0.9%

5.19 We have adopted a similar methodology in assessing the capacity for additional food and beverage floorspace over the Plan period to that used in assessing the need for retail floorspace and, for the purposes of this Study, it is assumed that there will be no increase in the retention level for food and beverage uses in any of the catchment areas. It is assumed that the turnover of food and beverage facilities will increase in real terms in the future and a growth rate of 1% per annum is adopted in line with guidance contained within Retail Planner Briefing Note.

5.20 Details of the capacity analysis for each catchment area are presented in Appendix 12. In summary, the capacity for additional food and beverage floorspace in the Study Area is shown in the following table:

Table 5.6: Floorspace Capacity – Food & Beverage Uses (sq.m gross)

Catchment Area	2025	2030	2038
Scunthorpe	264	397	603
Brigg	119	179	271
Barton-upon-Humber	78	115	171
Epworth & Crowle	39	61	96
Ashby High Street	59	85	125
Winterton	11	18	29
Kirton-in-Lindsey	19	31	49
Total	589	886	1,344

5.21 There is therefore limited capacity for additional food and beverage floorspace over the Plan period and, as such, it is not considered that there is a need to proactively plan for such provision. However, as outlined above, it is evident that food and drink related uses will play an increasingly important role in the future of centres by helping to lengthen 'dwell' times and increase footfall and activity within centres

providing clear and significant benefits for both the daytime and evening economies. The provision of food and drink uses can also help to secure the re-use of existing vacant premises within centres. ELG Planning would therefore advise that North Lincolnshire Council plan positively for such uses and adopt a flexible policy approach facilitate the provision of food and drink related uses, particularly where they would secure the re-use of existing vacant floorspace.

Museums, Galleries & Places of Cultural / Historic Interest

- 5.22 There are a small number of museums and art galleries across North Lincolnshire, with the North Lincolnshire Museum and the 20-21 Visual Arts Centre located in Scunthorpe Town Centre.
- 5.23 The North Lincolnshire Museum lies towards the southern edge of the town centre on Oswald Road and offers a range of permanent galleries, including the Jurassic Sea Gallery and Steel Town Gallery which opened in 2017, as well as a changing exhibition gallery. The 20-21 Visual Arts Centre is located in Church Square within the former St John's Church building. The venue opened in 2001 and offers an exhibition programme of contemporary art. 20-21 receives regular Arts Council funding and shows around 20 exhibitions per year across 6 exhibition spaces.
- 5.24 Normanby Hall is a regency mansion that is set within a 300 acre estate located approximately 5km to the north of Scunthorpe Town Centre. In addition to the main hall, the estate also accommodates a farming museum, Go Ape, children's playground, gift shop and café. There are also smaller scale museums and galleries elsewhere across North Lincolnshire, including Baysgarth House Museum and Wilderspin School Museum in Barton-upon-Humber and the Brigg Heritage Centre and Steel Rooms Gallery in Brigg.

- 5.25 The household survey identifies that 29.1% of respondents visit museums, galleries or places of cultural / historical interest, with venues within the Study Area capturing 47.2% of trips made by residents. North Lincolnshire Museum in Scunthorpe captures the highest proportion of trips made by residents (34.0%) based on the findings of the household survey. Venues in Hull capture 14.9% of such trips made by residents, including Hull Maritime Museum (4.9%) and Streetlife Museum (1.5%). Cultural destinations in York and Central London are also popular amongst respondents, capturing 6.6% and 9.3% of such trips respectively.
- 5.26 Museums, art galleries and other cultural attractions capture 47.2% of trips made by respondents and it is not considered that there is a requirement to plan for such attractions over the Plan period. However, the LPA should respond pro-actively to any proposals that come forward within designated centres, where such proposals could enhance the attractiveness and offer of those centres, encourage a greater proportion of locally generated leisure expenditure to be retained within North Lincolnshire and contribute to more sustainable patterns of travel by reducing the distance local residents have to travel to access such attractions.

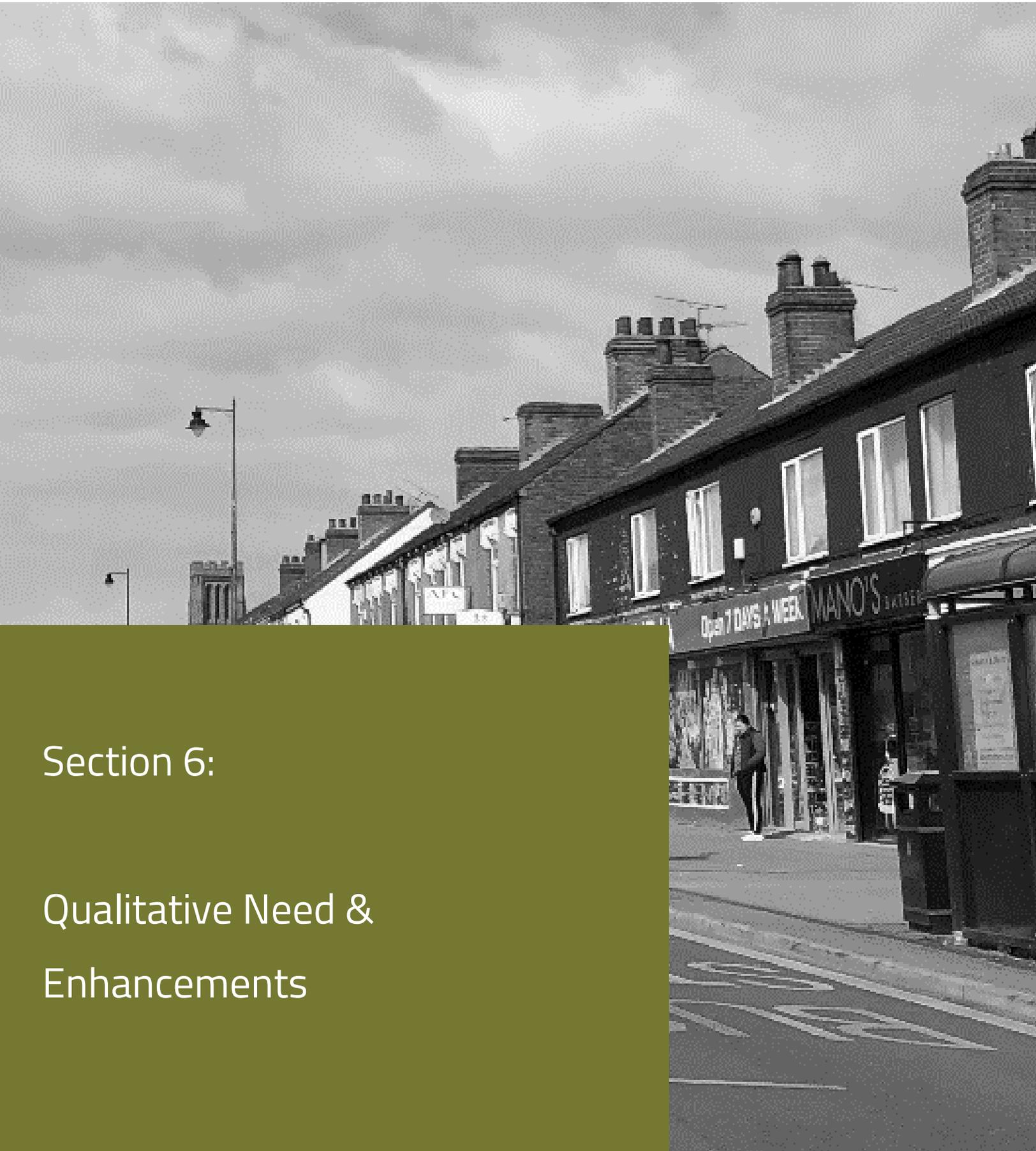
Theatres, Concert Halls & Live Music Venues

- 5.27 The Plowright Theatre is located on Laneham Street in Scunthorpe and accommodates a 334 seat auditorium. It is the sister venue of the Baths Hall located on Doncaster Road, which was a former public baths built in 1931 that served as an entertainment venue from the 1970s. It was rebuilt in the late-2000s and re-opened in 2011 and provides a modern entertainment venue capable of accommodating 1,200 people seated and 2,000 standing. There are also a number of smaller arts and live music venues located across North Lincolnshire.

- 5.28 The household survey identifies that 33.7% of respondents visit theatres and live music venues, with the Baths Hall (26.0%) and Plowright Theatre (20.1%) capturing the largest market share. The household survey identifies that venues in Central London and Hull capture 13.6% and 10.8% of such trips respectively.
- 5.29 It is considered that North Lincolnshire is relatively well catered for in terms of theatre and live entertainment venues with Scunthorpe accommodating the Baths Hall and Plowright Theatre, which capture 46.1% of such trips by respondents. ELG Planning do not therefore consider that there is any need to proactively plan for additional provision. However, it is evident that theatres and live music venues can make an important contribution to the evening economy and overall vitality and viability of town centres. On this basis, it is considered that any applications that come forward should be considered positively, provided that they accord with the adopted Development Plan and prevailing national guidance.

Section 6:

Qualitative Need & Enhancements

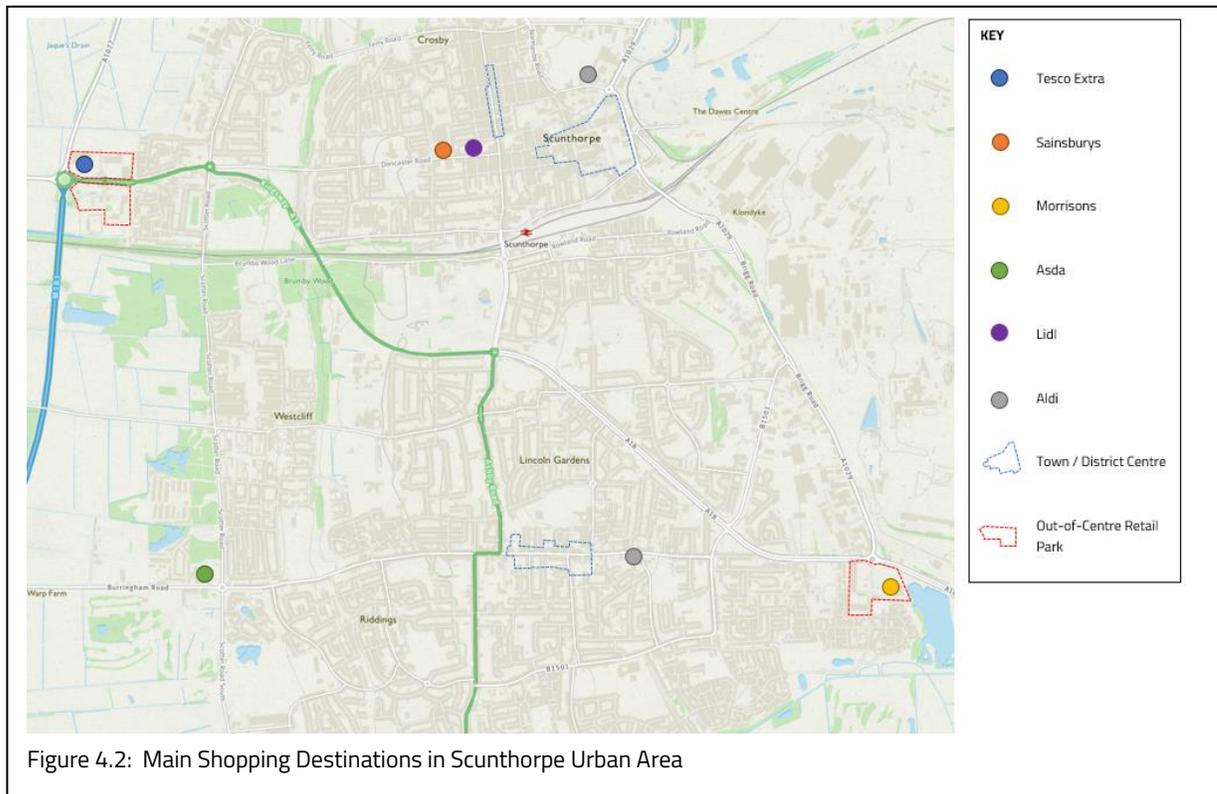


6. Qualitative Need & Enhancements

6.1 ELG Planning have undertaken a quantitative assessment of the need for new retail floorspace over the Plan period, however, it is also necessary to consider the qualitative need for new retail facilities and other associated improvements within centres across North Lincolnshire to maintain their vitality and viability. This assessment is based upon our observations of the main centres, detailed health checks and household survey information and considers factors including the diversity of uses in the main centres; the quality of the existing provision; and levels of expenditure retention.

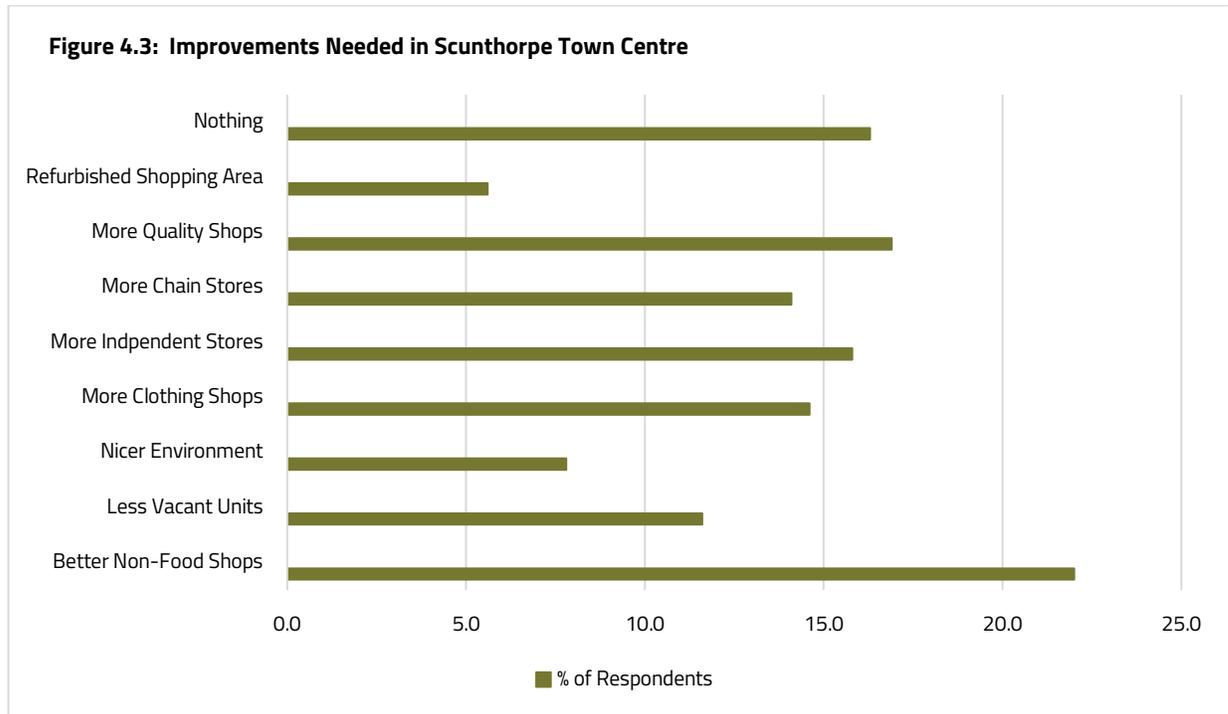
Scunthorpe Town Centre

6.2 Scunthorpe Town Centre is the largest retail centre within North Lincolnshire accommodating a range of retail, service, community and civic uses. The proportion of retail units within the town centre is broadly comparable with the national average and the convenience offer includes an ASDA Supermarket located to the south eastern edge of the centre on Carlton Street. There are a number of other national operators represented within the town centre including Iceland, Heron, Fulton Foods, Greggs and Cooplands. Residents in the Scunthorpe Urban Area also have access to a wide range of large foodstores (Figure 4.2 overleaf) that are suitable for main food shopping and the household survey confirms that these stores are the main destinations for such shopping trips amongst residents of the main urban area, primarily as they are located close to home, offer low prices / value for money and a range of goods. The Scunthorpe Urban Area is therefore well served in terms of food and grocery shopping.



- 6.3 There are a number of national multiple retailers represented within Scunthorpe, although there are a number focused on the discount and value sectors. The household survey identifies that 46.2% of respondents were either quite dissatisfied or very dissatisfied with the shopping provision in Scunthorpe Town Centre and, in terms of improvements needed in the town centre, 22.0% of respondents highlighted the need for a better range of non-food shops, 16.9% stated more quality shops were required and 14.1% suggested more national high street chain stores are needed.
- 6.4 The health check of Scunthorpe Town Centre identified that 22.0% of ground floor units within the town centre are currently vacant, which is significantly above the national average. The high vacancy rate is a particular sign of weakness in terms of the overall vitality and viability of the town centre and there is a large concentration of modern format retail units within the Parishes Shopping Centre and on Cole Street, which forms part of the designated primary shopping frontages. The re-occupation of these

units should therefore be a key priority in terms of maintaining and enhancing the vitality and viability of the town centre and 11.6% of respondents to the household survey indicated that a lower proportion of vacant units are a key improvement needed within the town centre.



6.5 The Scunthorpe Urban Area is relatively well served by leisure facilities, including a number of cafes, restaurants and pubs within the town centre. The North Lincolnshire Museum and 20-21 Visual Arts Centre are also located within the town centre and the Plowright Theatre and Baths Hall also lie within easy reach of the main shopping areas. We have identified limited quantitative need for further leisure facilities (Section 5) within the town centre and a limited proportion of respondents to the household survey identified additional leisure facilities as a key change needed within the town centre. However, a strong provision and choice of commercial leisure facilities can help to lengthen 'dwell' times and increase footfall and activity within centres providing clear and significant benefits for both the daytime and evening economies. Planning policies relating to the town centres should therefore provide sufficient flexibility to enable the centre to evolve and adapt to market trends, including an increased

focus towards retail service and commercial leisure uses in appropriate locations within the town centre.

Barton-upon-Humber

- 6.6 Barton-upon-Humber is a market town located towards the north eastern edge of the North Lincolnshire administrative area and is a key shopping and service centre providing retail, leisure and other supporting services. The town centre accommodates a total of 111 retail and commercial units, which are predominantly focused around High Street, King Street, George Street and Market Place.
- 6.7 The proportion of retail units within the town centre is lower than the national average with the main convenience provision comprising of a Co-Op store on Market Place and Heron Foods on Chapel Lane. The town centre also accommodates bakers, butchers, convenience stores, newsagents and greengrocers. Barton-upon-Humber is also served by an out-of-centre Tesco superstore and a recently constructed Lidl store on Ferriby Road, which are the main destinations for main food shopping trips amongst residents in the catchment area.
- 6.8 The non-food offer of Barton-upon-Humber is relatively limited and the majority of comparison goods outlets are operated by independent retailers, although there are a small number of national multiple retailers within the town centre. It is considered that a broader non-food offer could serve to create a more appealing shopping destination and diversify the wider offer of the town centre, although it is noted that the majority of respondents are either very satisfied or quite satisfied with the existing shopping provision within the town.
- 6.9 The vacancy rate within Barton-upon-Humber is lower than the national average and the town centre also offers an attractive shopping environment.

Brigg

- 6.10 Brigg is a market town located towards the south eastern edge of the North Lincolnshire administrative area and acts as a key shopping and service centre. The town centre accommodates a total of 131 ground floor retail and services units, with 42.0% in Class A1 retail use.
- 6.11 There is a Tesco superstore within the town centre and a Lidl store to the north west of the town centre, which are the main stores used for main food shopping within Zone 5, along with the Morrisons store at Lakeside Retail Park in Scunthorpe. There are also bakeries, butchers, newsagents and general stores located within the town centre. There is also a relatively good non-food offer within Brigg Town Centre, which mainly comprises of independent outlets although there is representation from national multiples in the form of B&M and Wilko. The household survey indicates that the overwhelming proportion of respondents who have visited Brigg in the last 12 months are satisfied with the existing shopping provision and over half of the respondents indicated that no changes are needed in the town centre.
- 6.12 There is also a wide range of service uses within the town centre, including a number of cafés, restaurants and public houses, as well as a number of health and beauty related uses. The proportion of hot food takeaway units within Brigg does not currently have a negative impact on the town centre, however, the Council may wish to consider appropriate policy mechanisms to control the proportion of such uses.
- 6.13 The vacancy rate within Brigg is below the national average and the town centre generally offers a pleasant and attractive shopping environment aided by much of the centre being semi-pedestrianised.

Crowle

- 6.14 Crowle is a market town that acts as the service centre for the northern part of the Isle of Axholme towards the western edge of the North Lincolnshire administrative boundary. The centre accommodates a total of 27 ground floor retail and commercial units, which are largely focused around the Market Place and A161.
- 6.15 The retail offer within Crowle is relatively limited, with residents primarily looking to destinations within Scunthorpe for main food and non-food shopping trips. The town centre therefore performs a largely top-up shopping role and a Co-Op foodstore has recently opened on Johnson's Lane, which has enhanced the retail offer of the town. There is also a Tesco Express on High Street to the north of the town centre. Whilst the existing retail offer is limited, the majority of respondents to the household survey indicated that they were either quite satisfied (48.0%) or very satisfied (15.6%) with the existing shopping provision, with only 12.9% of respondents expressing dissatisfaction. However, in terms of improvements needed within Crowle, the largest proportion of responses focused on improved retail provision and it is clear that enhanced retail offer would improve the overall vitality and viability of the centre.
- 6.16 The overwhelming majority of units within the centre are in service use and there has been a significant increase in such uses since the previous health check was carried out in 2005. There is a relatively high proportion of hot food takeaways within Crowle and an overprovision of such uses can negatively impact on centres for reasons including the creation of dead frontage during the daytime, as well as discouraging shoppers and future retail opportunities. The Council may therefore wish to consider policy mechanisms to ensure an inappropriate level of such uses is not provided within Crowle in order to maintain the vitality and viability of the centre.

- 6.17 The vacancy rate within Crowle is relatively low and the centre provides an attractive shopping environment, which has been improved through recent public realm works.

Epworth

- 6.18 Epworth is a market town that acts as the main service centre for the Isle of Axholme and accommodates 91 ground floor retail and commercial units primarily focused around High Street, Market Place and Church Street.
- 6.19 The convenience goods offer within Epworth is relatively limited and comprises entirely of independent operators, including two bakers, a butchers, greengrocer, newsagent and a general store. Epworth Co-Op previously occupied a unit at the junction of Queen Street and Albion Hill, however, they have now relocated to a unit to the south of the town at the junction of Albion Hill / Mowbray Street. The centre therefore currently lacks representation from a national operator convenience store, which would enhance the attractiveness of Epworth Town Centre as a top-up shopping destination. Epworth is considered to have a reasonable non-food offer relative to its role and function, with the comparison goods outlets occupied by independent retailers and the majority of respondents to the household survey who had visited the town in the last 12 months were satisfied with the existing shopping provision (66.6%).
- 6.20 The town also has a strong service use sector to serve the needs of the local population, including a large proportion of health and beauty related uses; café, pubs and restaurants, as well as insurance brokers and funeral directors. Epworth also provides a pleasant shopping environment and has a low

vacancy rate, although the former Epworth Co-Op premises is a relatively large, prominent vacant unit and opportunities should be sought to secure its active re-use.

- 6.21 There is an existing public car park located towards the northern edge of the town centre, although there were limited spaces available at the time of our visit. The household survey also identified that 31.2% of respondents who had visited Epworth in the last 12 months highlighted the provision of additional parking spaces as a key change needed, however, given the historic street pattern it is difficult to see where additional accessible car parking provision could be made.

Kirton-in-Lindsey

- 6.22 Kirton-in-Lindsey is designated as a District Centre and accommodates a total of 24 ground floor retail and commercial units, which are focused around Market Place and High Street.
- 6.23 The convenience retail offer within the District Centre is focused on top-up shopping commensurate with the role and function of Kirton-in-Lindsey and includes a Co-Op, Spar, Costcutter, butchers and newsagents. There is also a limited range of non-food outlets, including an optician, chemist, gift shop and kitchen showroom. Only 7.3% of respondents to the household survey who had visited Kirton-in-Lindsey expressed dissatisfaction at the existing shopping provision in the town centre. There is also a reasonable service offer within Kirton-in-Lindsey and no respondents to the household survey identified enhanced service provision as a key change needed within the District Centre.
- 6.24 The main car parking provision within Kirton-in-Lindsey is located around the Market Place, however, there were limited spaces available at the time of our visit. The household survey also identified that 22.7% of respondents who had visited Kirton-in-Lindsey in the last 12 months highlighted the provision

of additional parking spaces as a key change needed. The health check that has been undertaken (Appendix 10) also identifies concerns in relation to pedestrian accessibility within parts of the District Centre.

Winterton

- 6.25 Winterton is a District Centre located towards the northern edge of the administrative area and accommodates a total of 23 ground floor retail and commercial units focussed around Market Street, High Street and King Street.
- 6.26 The existing retail offer is focussed on top-up shopping commensurate with the role and function of the District Centre and the convenience offer includes a Co-Op, Tesco Express and Premier, as well as an independent bakery and fishmonger. There is also a reasonable non-food offer with Winterton comprising independent retailers offering a varied range of goods. Only 17.2% of respondents to the household survey who had visited Winterton in the last 12 months expressed dissatisfaction at the existing shopping provision, which would indicate that the District Centre is meeting the needs of local residents as a local shopping destination.
- 6.27 There is also a reasonable provision of service uses within Winterton and no vacant units at the current time. The off-street car parking within Winterton is limited to a small customer car park associated with the Co-Op store. 10.0% of respondents to the household survey identified the provision of more parking spaces as a key change required in Winterton, however, given the historic street pattern it is difficult to see where additional accessible car parking provision could be made.

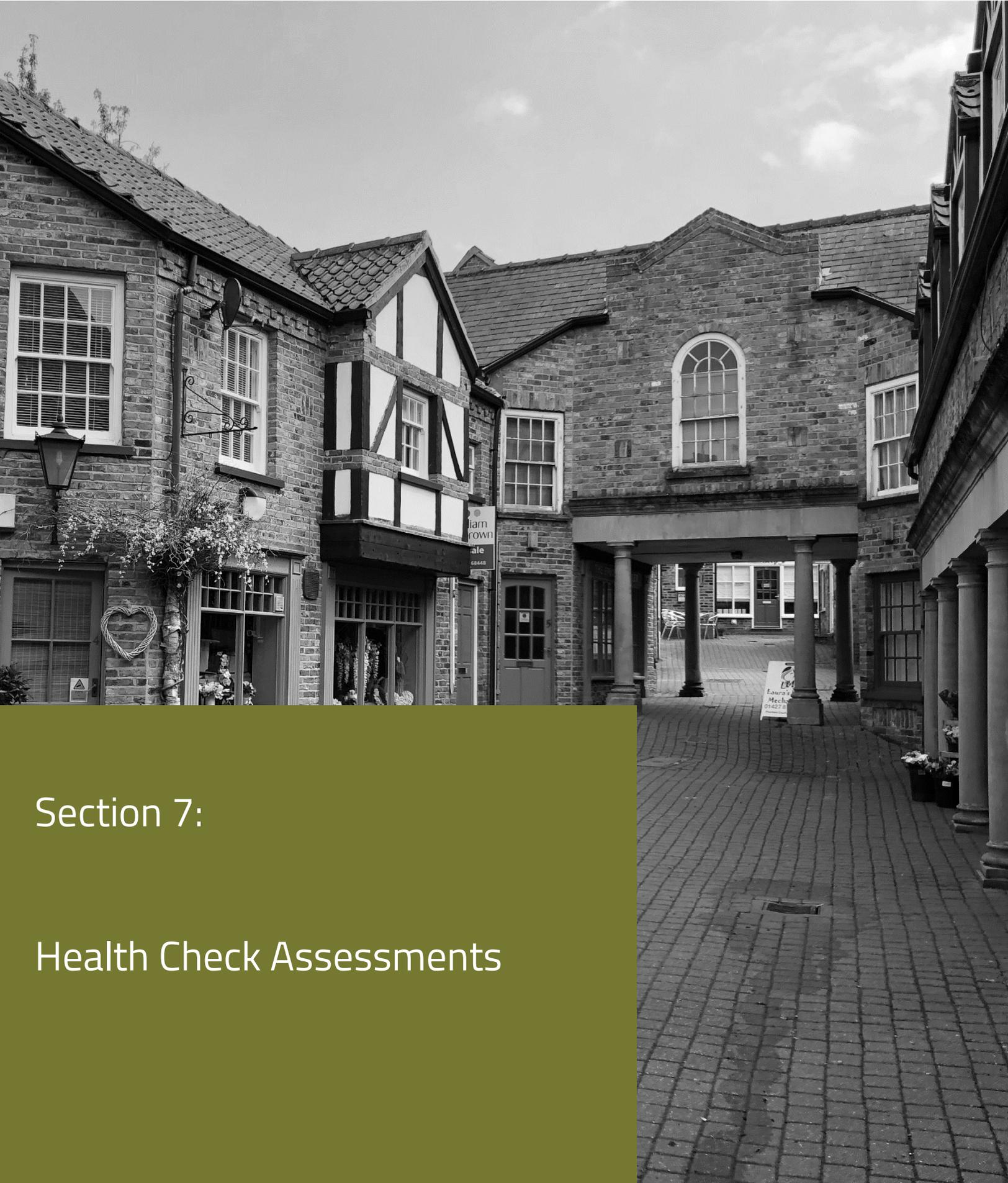
Ashby High Street

- 6.28 Ashby High Street District Centre is a linear centre of predominantly terraced retail and commercial units flanking High Street to the southern edge of the Scunthorpe Urban Area. There are also a number of larger format units within a parade located centrally within the District Centre known as Broadway, which accommodates a number of national multiple retailers.
- 6.29 The District Centre predominantly performs a top-up shopping role and benefits from a strong convenience offer, including Iceland, Tesco Express, Heron Foods, Greggs and Cooplands, as well as independent greengrocers, butchers and a continental supermarket. There is also an Aldi supermarket located approximately 250m to the east of the District Centre boundary. There is also a reasonable comparison goods offer comparative to the role and function of the District Centre, which includes representation from a number of national multiples, including Home Bargains, Wilko, Card Factory and Boots to supplement a range of independent non-food retailers. The District Centre is therefore considered to provide a good retail offer and this is supported by the fact that only 10.8% of respondents to the household survey who had visited Ashby High Street in the last 12 months expressed dissatisfaction with the current shopping provision.
- 6.30 The District Centre also has a good service offer and a low vacancy rate, although the former Kwik Save unit towards the eastern edge of the centre is a large, longstanding vacant unit and opportunities should be sought to secure the active re-use of this unit.
- 6.31 Ashby High Street is also considered to offer a relatively pleasant shopping environment characterised by well-maintained terraced retail and commercial properties flanking High Street. There is also

evidence of recent public realm improvements around Broadway and an extension of these works across the wider centre would further enhance the quality of the shopping environment.

Frodingham Road

- 6.32 Frodingham Road is a linear District Centre located to the north west of Scunthorpe Town Centre within the main urban area.
- 6.33 The centre performs a largely localised, top-up shopping role and accommodates a large number of independent convenience stores, including several continental / international supermarkets representative of the diverse demographic of the surrounding area. Frodingham Road has a limited non-food offer, although only 30.8% of respondents to the household survey who had visited Frodingham Road in the last 12 months expressed dissatisfaction with the shopping provision. 10.5% of respondents did however highlight more clothing shops as a key change needed in Frodingham Road with 7.3% suggested a requirement for a better range of non-food shops and 6.6% identified a need for more chain / well known stores.
- 6.34 The Frodingham Road District Centre provides a relatively poor shopping environment and does not provide a particularly welcoming or safe feeling environment. This is reflected in the responses to the household survey, with a number of respondents highlighting an improved environment and better security as a key change needed within the centre.



Section 7:

Health Check Assessments

7. Health Check Assessments

7.1 The NPPF encourages LPAs to recognise town centres as the heart of their communities and pursue policies to support their vitality and viability and promote competitive town centres that provide consumer choice and a diverse retail offer, which reflect the individuality of town centres. The vitality and viability of individual centres is assessed through performing health checks and National Planning Practice Guidance (NPPG) confirms that the following indicators, and their changes over time, are relevant in assessing the health of town:

- Diversity of Uses;
- Proportion of Vacant Street Level Property;
- Commercial Yields on Non-Domestic Property;
- Customers' Views and Behaviour;
- Retailer Representation and Intentions to Change Representation;
- Commercial Rents;
- Pedestrian Flows;
- Accessibility;
- Perception of Safety and Occurrence of Crime;
- State of Town Centre Environmental Quality

7.2 ELG Planning have carried out health check assessments of the designated centres across North Lincolnshire, which are contained at Appendix 13 of the Retail & Leisure Study. The main findings are summarised below.

Scunthorpe Town Centre

- 7.3 ELG Planning are of the opinion that Scunthorpe Town Centre is currently in moderate health but is exhibiting clear signs of weakness and may be vulnerable to the well-documented challenges facing high streets across the UK.
- 7.4 The town centre does however offer a reasonably pleasant shopping environment and there are signs of recent investment around Church Square, as well as the recent relocation of the indoor market to the Parishes Shopping Centre. The town centre was also relatively busy at the time of our visit, particularly around High Street and the Foundry Shopping Centre, and is also highly accessible by a range of transport modes.
- 7.5 There are a number of national multiple retailers represented within Scunthorpe, although these are mainly focused on the discount and value sectors. The town centre does however benefit from the presence of Oldrid's department store selling a wide range of fashion, homeware, electrical and leisure goods. There are however currently limited retailer requirements for Scunthorpe Town Centre and it accommodates national brands who are facing considerable trading difficulties at the current time and it is considered that Scunthorpe Town Centre could be susceptible to the loss of national brands in the short term. The high vacancy rate is a particular sign of weakness and there is a large concentration of modern format retail units within the Parishes Shopping Centre and on Cole Street.
- 7.6 On this basis, whilst the town centre is performing relatively well against certain key indicators, it is also exhibiting clear signs of weakness and could be vulnerable to the current challenges facing high streets throughout the country.

Barton-upon-Humber

- 7.7 Barton-upon-Humber is a market town located towards the north eastern edge of the North Lincolnshire administrative area and is a key shopping and service centre providing retail, leisure and other supporting services.
- 7.8 There is currently no main supermarket representation within Barton-upon-Humber town centre with the main foodstores serving the town comprising of the out-of-centre Tesco and Lidl stores. Notwithstanding this, the town centre has a reasonable convenience goods offer including a Co-Op foodstore and Heron Foods. The town centre also accommodates bakers, butchers, newsagents and greengrocers. The non-food offer of Barton-upon-Humber is however relatively limited representing 27% of the total number of units within the town centre. The overwhelming majority of comparison goods outlets within the town centre are operated by independent retailers, with only a small number of non-food national multiple retailers present, such as Boots and Lloyds Pharmacy. It is therefore considered that the non-food offer represents a weakness of Barton-upon-Humber and a broader comparison goods offer could serve to create a more appealing shopping destination and diversify the wider offer of the town centre.
- 7.9 The majority of the town centre lies within the Barton Upon Humber Town Centre Conservation Area and the buildings have a mixed palette of materials, although the majority are brick built. There are a number of attractive buildings within the town centre reflecting its designation as a Conservation Area, with a number located in the area around the High Street. However, there are also a number of vacant sites / neglected buildings within this part of the town centre that are detrimental to the quality of the built environment and general perceptions of this part of the town centre.

7.10 The town centre is accessible by sustainable modes of transport with bus stops offering services to a range of local destinations located throughout the town centre. Barton Train Station also lies approximately 150m to the north of the town centre. There are no pedestrianised areas within the town centre, however, pedestrian movement is relatively unconstrained with the majority of commercial streets being relatively lightly trafficked vehicular routes, with the exception of Market Place. The pedestrian environment is also relatively good with well-maintained pavements and dropped kerbs throughout the majority of the town centre. There are also a number of existing car parks conveniently located within and to the edge of the town centre, the majority of which operate a free all-day parking policy. Furthermore, on street parking across the town is operated on a 2 hours free parking (no return within 2 hours) between Monday-Saturday.

7.11 Overall, it is therefore considered that Barton-upon-Humber has a moderate level of vitality and viability.

Brigg

7.12 Brigg is a market town located towards the south eastern edge of the North Lincolnshire administrative area and acts as a key shopping and service centre.

7.13 The town centre has a good convenience offer including a Tesco store located within the town centre boundary, which is a key food shopping destination for residents within the catchment area and is a key anchor for the wider town centre. The overwhelming majority of comparison goods units within the town centre are operated by independent retailers, with only a small number of non-food national multiple retailers present, including B&M, Wilko and Boyes. Having regard to recent national trends in

the non-food sector, it is clear that a strong and vibrant independent sector is going to be key to the long term viability and viability of town centres like Brigg.

7.14 There has been growth in the proportion of service uses within the town centre since the previous survey was undertaken in 2005, with a relatively strong representation of cafés, restaurants and public houses and health and beauty related uses. There remains representation in the town centre from the main high street banks and building society, although it is noted that branches of Natwest and HSBC have closed in recent years.

7.15 Brigg town centre offers a pleasant and welcoming shopping environment with a vacancy rate below the national average and the majority of the town centre lies within the Conservation Area boundary, which is reflected in the largely attractive built environment. There are a number of centrally located public car parks within the town centre ensuring that accessibility by car is good and accessibility by public transport is rated as fair.

7.16 It is therefore considered that Brigg is a vital and viable town centre.

Crowle

7.17 Crowle is a small market town acting as the service centre for the northern part of the Isle of Axholme. The retail offer largely caters for top-up shopping requirements and has recently been enhanced following the opening of the Co-Op Food store on Johnson's Lane. The majority of units within the town centre are occupied by service uses, including a range of café, restaurant and public house uses. It is also noted that there are a number of hot food takeaways within Crowle and an overprovision of such uses can negatively impact on centres. The Council may therefore wish to consider policy mechanisms

to ensure an inappropriate level of such uses is not provided within Crowle in order to maintain the vitality and viability of the centre.

- 7.18 The town centre lies within the Conservation Area boundary and has benefitted from public realm works around the Market Place in recent years. The town centre is therefore considered to provide a relatively pleasant shopping environment with only a small number of vacant units, although pedestrian movement is hindered to some extent due to the presence of the A161, which runs north-south through the town centre.
- 7.19 Overall, Crowle is considered to be a reasonably healthy small Market Town centre performing an important top-up shopping and service role for residents in the local area.

Epworth

- 7.20 Epworth is the main service centre for the Isle of Axholme and accommodates a total of 91 retail and commercial units. The convenience goods offer within the town centre is relatively limited and comprises entirely of independent retailers, with no representation from national operators following the relocation of the Co-Op. The town centre does however provide a reasonable non-food offer, with the entirety of the comparison goods outlets operated by independent retailers. Epworth also has a strong service offer, including a strong representation of health and beauty related uses, as well as cafés, pubs and restaurants. There is also a branch of HSBC within the town centre, as well as a number of hot food takeaway uses.

- 7.21 The town centre also offers an attractive shopping environment forming part of the Epworth Conservation Area and the vacancy rate is relatively low, although the former Co-Op unit is a relatively large vacant unit in a prominent location and opportunities should be sought for its active re-use.
- 7.22 Overall, Epworth is considered to be a vital and viable town centre performing an important top-up shopping and service role for residents in the local area.

Kirton-in-Lindsey

- 7.23 Kirton-in-Lindsey is a small District Centre accommodating a total of 24 ground floor retail and commercial units.
- 7.24 The District Centre has a relatively strong convenience offer, including Co-Op, Spar, Costcutter, two butchers and two newsagents which offer top-up shopping facilities for local residents commensurate with the role and function of Kirton-in-Lindsey as a District Centre. There is also a limited range of non-food outlets, including an optician, chemist and gift shop. Service uses represent 45.8% of the overall provision of ground floor units within Kirton-in-Lindsey, with café, restaurant and public houses accounting for 8.3% of the total units within the centre. There is also a strong representation of hairdressers and health and beauty related uses within Kirton-in-Lindsey, which account for 16.7% of the total number of uses within the centre.
- 7.25 There were only two vacant units within the District Centre identified during our visit and Kirton-in-Lindsey offers a safe and pleasant shopping environment, with a number of attractive buildings within the town centre, including several Grade II listed buildings dispersed across the historic core of the town and within the Market Place. Pedestrian footfall within the centre was relatively low at the time of our

visit and we have also identified issues in terms of accessibility for the less mobile within certain parts of Kirton-in-Lindsey.

- 7.26 Overall, Kirton-in-Lindsey is considered to be a vital and viable District Centre performing an important top-up shopping and service role for residents in the local area.

Winterton

- 7.27 Winterton is a District Centre located towards the northern edge of the North Lincolnshire that performs a localised role as a shopping and service centre for residents of the village and immediate surrounding area.
- 7.28 The District Centre has a reasonably good top-up convenience offer includes a Co-Op, Tesco Express and Premier, as well as an independent bakery and fishmonger. There is also a reasonable non-food offer within the District Centre, which account for 36.4% of the total number of ground floor units within Winterton. Services uses account for 45.5% of the units within the District Centre and include four health and beauty related uses, three restaurants / cafes / pubs and two hot food takeaways.
- 7.29 There are currently no vacant units and Winterton offers a safe and pleasant shopping environment, although there are a small number of units within the centre that would benefit from further investment. There is limited car parking available within the District Centre, although it is accessible on foot from the surrounding residential areas and there are also bus stops within the centre offering regular services between Scunthorpe and Hull.
- 7.30 Overall, it is considered Winterton a vital and viable District Centre performing an important top-up shopping and service role for residents of the village and immediate surrounding area.

Ashby High Street

- 7.31 Ashby High Street High Street is a popular District Centre performing an important role as a local shopping and service centre serving the residential areas to the south of Scunthorpe.
- 7.32 The District Centre has a strong convenience goods offer, including representation from Iceland, Tesco Express, Heron Foods, Greggs and Cooplands, as well as a number of independent retailers. There are also 40 comparison goods outlets within Ashby High Street with representation from a number of national multiples, including Home Bargains, Wilko, Card Factory and Boots to supplement the range of independent non-food retailers. There is also a high proportion of service uses within Ashby High Street District Centre, which include a number of health and beauty related uses, cafes, public houses and hot food takeaways.
- 7.33 There is a low vacancy rate within Ashby High Street and the centre also offers a pleasant shopping environment with signs of recent investment in the built environment in the form of public realm improvement works around Broadway. Ashby High Street is also highly accessible, including by sustainable modes of transport.
- 7.34 Ashby High Street is therefore a vital and viable District Centre that performs an important local shopping and service role for the local population to the south of Scunthorpe.

Frodingham Road

- 7.35 Frodingham Road is a linear District Centre located to the north west of Scunthorpe Town Centre within the main urban area.
- 7.36 There are a high proportion of convenience goods outlets within Frodingham Road, although there is no national retailer representation and the offer is therefore provided entirely by independent retailers. In particular, there are a large number of continental / international supermarkets along Frodingham Road reflective of the diverse demographic of the local population. There is a limited non-food offer within the District Centre accounting for just 13.8% of the total number of units.
- 7.37 There are a total of 30 service units within the District Centre, representing 44.6% of the overall provision of ground floor units. There are a number of restaurant, café, public house uses within Frodingham Road, which represent 13.8% of the total number of units. There are also a relatively high proportion of hot food takeaway uses within Frodingham Road, which create dead frontages during normal daytime trading hours and have a negative impact on the overall vitality and viability of the District Centre.
- 7.38 There is a vacancy rate of 9.2% within the District Centre, although it is noted that a number of the identified vacant units appear to have stood empty for an extended period and were of a poor visual appearance, including broken shopfronts and a generally dilapidated appearance. The overall environmental quality and physical appearance of the District Centre is also relatively poor with a number of tired looking commercial units in need of investment, which incorporate poorly designed shopfronts featuring oversized fascias and low quality materials. The heavily trafficked main road running through the centre also contributes to the relatively poor shopping environment. In addition,

despite the presence of CCTV throughout the centre, Frodingham Road does not provide a particularly welcoming environment with clear signs of crime and anti-social behavior.

7.39 Overall, it is therefore considered that the Frodingham Road District Centre has a relatively low level of vitality and viability.



Section 8:

Summary & Conclusions

8. Summary & Conclusions

8.1 This Retail & Leisure Study has been prepared on behalf of North Lincolnshire Council to inform the preparation of the new North Lincolnshire Local Plan, which will cover the period to 2038. The Study has addressed a number of key tasks outlined by the Council and we would draw the following conclusions:

Task One: Planning Background & Retail Trends

8.2 The Retail & Leisure Study has provided an analysis of recent economic conditions and the near to long-term outlook, as well as recent trends in the retail sector that are likely to impact on the need for new retail and main town centre uses over the Plan period.

8.3 Internet shopping has been one of the key influences on the retail sector in the last decade and the growth in this sector has ensured that special forms of trading now account for approaching one-fifth of all retail sales. It is clear that the internet and multi-channel retailing will continue to play a fundamental role in the retail sector and will continue to provide challenges for individual retailers and town centres across North Lincolnshire.

8.4 However, digital technology also provides opportunities for individual centres and it is important that these opportunities are fully embraced. It is considered that the future strategy for centres across North Lincolnshire should support the provision of necessary infrastructure to support digital engagement, including, for example, offering support to the integration of click and collect hubs. The provision of such hubs will ensure that there is a degree of support to individual centres from internet shopping, as, whilst

goods would still be purchased on the internet, customers would need to visit the centres to collect their goods and then may visit other retailers as part of the same trip.

- 8.5 Improved digital connections are also going to play a key role in the future of town centres and the availability of WiFi / 4G / 5G is likely to appeal to visitors and will enable businesses to market their business, engage with customers using social media, share discounts and offers and find out more about the type of consumers using the town centre, as well as helping to support a move to digital shopping channels.
- 8.6 The *'Big Four'* supermarkets continue to dominate the food retail sector, however, they have all experienced trading difficulties in recent years with their collective market share having fallen from 75.7% in June 2013 to 66.0% in March 2019. These difficulties reflect the fact that there is over capacity in the market and the leading grocery retailers have, on the whole, cut back on plans for new investment in recent years. Conversely, the German-owned discount retailers, Aldi and Lidl, have significantly increased their collective market share in recent years and are continuing to expand.
- 8.7 The non-food retail sector is also going through a continued period of upheaval with recent years having seen a number of high profile non-food retailers failing or undertaking significant restructuring, including the Arcadia Group, House of Fraser, New Look and Debenhams. It is clear that that the established retail brands that have been staples of the high street, whilst remaining an important component, can no longer necessarily be relied upon as the cornerstones of successful and vibrant high streets and retail destinations of the future. It is therefore apparent that town centres need to be adaptable and evolve into complete community hubs incorporating housing, culture, education, entertainment, leisure and community uses, as well as retaining an important retail function, including a diverse and vibrant independent offer.

- 8.8 High streets and town centres across the UK have therefore been facing significant challenges and the Covid-19 pandemic has placed an increased burden on shops and businesses, with non-essential businesses having to close during lockdown and others having to adapt to continue operating, with footfall across the UK's high streets down approximately 81% during lockdown. It is estimated that approximately 24,348 jobs were lost in the retail sector alone in the first half of 2020 and it is expected that this figure will continue to rise as further retailers enter administration or undergo further restructuring in response to the economic impact of the pandemic. Footfall across high streets is struggling to return to pre-lockdown levels as lockdown restrictions are being eased and a number of major retail and leisure operators have announced that they are highly unlikely to re-open all their outlets.
- 8.9 In particular, it is noted that Scunthorpe Town Centre accommodates a number of high profile national retailers who are experiencing well-publicised trading difficulties and, in view of the recent changes in the retail sector and prevailing economic climate exacerbated by the impacts of Covid-19, it is conceivable that the town centre may experience high profile retailers vacating in the short to medium term and it is therefore important that a strategy is developed to ensure that the town centre can be responsive to any future departures in order to minimise their impact on the overall vitality of the centre. This could include seeking to accommodate a broader mix of uses within the main shopping areas, including large-scale leisure and entertainment uses that can drive footfall, increase spend and encourage customers to dwell for longer within the centre.

Task Two: Future Shopping Needs

- 8.10 An assessment of future shopping needs across North Lincolnshire has been carried out and the defined Study Area comprises all of the North Lincolnshire administrative area, as well as some adjoining areas to the south, and has a total population of approximately 179,500.
- 8.11 The analysis is informed by a telephone household survey undertaken in April and May 2019, which collected information on both convenience and comparison shopping behavior and residents' views on existing shopping provision, deficiencies and the need for improvements. The household survey identifies that the destinations with the largest market shares for convenience goods shopping are Asda, Burringham Road (12%); Tesco, Gallagher Retail Park (11%); and Morrisons, Lakeside Retail Park (11%). Other stores with a relatively high market share for convenience goods shopping are Aldi, Glebe Road (8%); Tesco, Brigg (6%); Aldi, Ashby (5%); Sainsburys, Doncaster (5%); and Tesco, Barton (5%).
- 8.12 The Scunthorpe Urban Area has the largest market share of comparison goods turnover, representing 86.8% of all comparison turnover in the Study Area. Scunthorpe Town Centre is the centre most used for comparison goods shopping followed by Lakeside Retail Park and Gallagher Retail Park. Outside the Scunthorpe urban area, the largest market shares of comparison goods turnover are in Barton-upon-Humber (4.9%), Brigg (4.8%) and Ashby (2.6%). However, it should be noted that the Study Area only retains 79% of the comparison goods expenditure generated in 2017. There is a significant leakage of comparison goods spending to Hull City Centre, Grimsby Town Centre, Doncaster Town Centre and Meadowhall. In addition, 25% of respondents mainly do comparison goods shopping via the Internet.
- 8.13 Based on expenditure growth forecasts, the floorspace capacity for additional shopping development in North Lincolnshire is as follows:

Table 8.1: Floorspace Capacity (sq.m gross)

Catchment Area	Convenience Goods			Comparison Goods		
	2025	2030	2038	2025	2030	2038
Scunthorpe	-	-	-	-	0-260	0-1,240
Barton-upon-Humber	0-20	0-40	0-70	100-120	0-100	0-140
Brigg	-	-	-	0-200	0-180	0-250
Epworth & Crowle	-	-	0-10	10-40	10-30	10-40
Kirton-in-Lindsey	0-20	0-20	0-20	10-20	10-20	10-20
Winterton	-	-	-	10	10	10
Ashby	0-120	0-140	0-190	-	-	-
Frodingham Road	10	10	10	-	-	-

8.14 There is very little capacity for additional convenience goods floorspace in any of the catchment areas because of the low rate of growth in convenience goods spending and the allowance that has been made for commitments for new floorspace. In comparison goods, there is greater capacity, however, this is still limited in relation to the size of the main shopping centres.

Task Three: Town Centre Leisure Uses

8.15 The Retail & Leisure Study has also assessed the future requirements for commercial leisure and other main town centre uses across North Lincolnshire. The assessment focuses on a range of commercial leisure use that contribute to the vitality and viability of individual centres, including cinemas; indoor family entertainment centres; health and fitness facilities; food and beverage uses; museums, galleries and places of cultural interest; and theatres, concert halls and live music venues.

8.16 The assessment has not identified a quantitative need for the Council to proactively plan for commercial leisure uses over the Plan period. However, it is clear that such uses can help to increase the attractiveness of individual centres and increase dwell times, footfall and activity, thereby making an

important contribution to both daytime and evening economies. In view of the continued turbulence in the retail sector, it is clear that the future success of centres across North Lincolnshire will be dependent on providing a diverse offer and, as such, it is considered that the Council should respond positively to proposals that come forward for commercial leisure uses within the main centres, particularly where they would help secure the re-use of existing vacant floorspace.

Task Four: Health of Town & District Centres in North Lincolnshire

- 8.17 The Retail & Leisure Study also include health check assessments of the individual centres across North Lincolnshire based on the key indicators outlined within National Planning Practice Guidance.
- 8.18 Scunthorpe Town Centre is considered to be in moderate health but is exhibiting clear signs of weakness and may be vulnerable to the well-documented challenges facing high streets across the UK. The high vacancy rate within the town centre is a particular sign of weakness and there is a large concentration of empty modern format units within the Parishes Shopping Centre and Cole Street.
- 8.19 The market towns of Barton-upon-Humber, Brigg, Crowle and Epworth are largely considered to be in moderate health. The District Centres of Kirton-in-Lindsey, Winterton and Ashby High Street are all also considered to be vital and viable centres performing an important top-up shopping and service role for residents in the surrounding area. However, Frodingham Road District Centre is considered to have a low level of vitality and viability, with the poor physical environment and sense of security highlighted as particular weaknesses of the centre.