Executive
Summary

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North East Lincolnshire
Retail, Leisure and Three Centres Study

North East Lincolnshire Council

June 2013

NORTH EAST LINCOLNSHIRE COUNCIL
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EXECUTIVE SUMMARY

1.1 GVA was appointed in April 2013 to prepare a borough-wide retail, leisure and three centres study to inform the emerging Local Plan. The study establishes current shopping and leisure patterns; reviews town centre floorspace composition; assesses future quantitative and qualitative needs; and provides strategic advice on appropriate development strategies for the town centres. A comparative assessment of the findings against the previous borough retail study (2005) is also provided.

FLOORSPACE SURVEYS

1.2 The current floorspace composition of the main centres in the borough has been established by utilising the latest Experian Goad survey data, updated by GVA to reflect existing adopted town centre (primary) shopping area boundaries. The main summary conclusions of the floorspace surveys are as follows:

CENTRE	CONCLUSIONS
GRIMSBY (TOP TOWN)	**The convenience offer has remained relatively consistent since 2005; the offer remains limited and significantly below Goad regional averages in terms of number of units and floorspace. Conversely, the comparison retail offer is above Goad averages and reflects the predominant sub-regional comparison function of the town centre.** **Vacancies have significantly increased since 2005. Whilst the amount of vacant floorspace within the town centre is below Goad regional averages, the number of units is significantly above average and suggests that smaller units are predominantly vacant.** **Overall, the centre is relatively viable (Freshney Place etc.) although older parts to the south of Victoria Street are showing signs of decline.**
GRIMSBY (FREEMAN STREET)	**The number of convenience units has decreased since 2005 although the amount of floorspace remains above the Goad regional average due to the large Asda.** **The centre has a particularly limited comparison retail offer which has further contracted since 2005. The number of units and floorspace is significantly below the Goad average.** **There has been a significant increase in the number of vacancies within the centre since 2005; this reflects the decline in the retail function of the centre and ongoing regeneration initiatives whereby comprehensive physical intervention and redevelopment for alternative non-retail uses is to be brought forward.** **The centre is increasingly not viable and further physical consolidation will be required alongside the ongoing planned intervention.**
CLEETHORPES	**The convenience and comparison retail offer is relatively small-scale and orientated towards meeting top-up shopping needs. However, the local independent offer is popular and qualitatively distinguishes the centre from the more mainstream offer in Grimsby.** **The centre has a significant service based function with a concentration of food and drink uses around the Market Place and Alexandra Road catering for tourists.** **There are only three vacant units within the defined town centre boundaries reflecting the ongoing viability of the centre.**

IMMINGHAM	**The centre has a limited retail offer at present and has a high level of vacancies; this is however reflective of the ongoing regeneration plans for the shopping precinct which include substantial demolition and remodelling to accommodate a new Tesco foodstore anchor. The overall centre viability should significantly improve once the planned regeneration is complete.**

1.3 On the basis of the floorspace surveys and the recommendations summarised above, individual plans have been prepared for each respective main centre confirming potential retail policy area and frontage changes to the existing adopted proposals map. It is recommended that tighter boundaries are drawn for Grimsby Top Town and Cleethorpes in particular. Grimsby Freeman Street is recommended to be split into two distinct shopping area entities with the southern part forming a consolidated district centre and the northern part at Cleethorpes Road redefined as a local centre.

RETAIL NEED ASSESSMENT

1.4 The study is informed by a detailed household telephone survey exercise (900 surveys across 9 catchment zones) and follows the PPS4 practice guidance[1] by adopting a step-by-step approach to quantify needs across the main centres in the borough.

1.5 All catchment zones are defined on the basis of individual postcode sectors, so as to generate population and expenditure data from the *Experian Micromarketer* system. The latest Experian Retail Planner briefing note (v. 10, September 2012) was utilised to provide estimates of expenditure growth, sales efficiency growth and deductions for non-store forms of trading (SFTs). Tourist inflows have been quantified through utilising the latest STEAM data (2012).

CENTRE	CONVENIENCE	COMPARISON
GRIMSBY (TOP TOWN)	**The town retains c. 80 to 90% of main food spend arising within its immediate catchments. Most expenditure is directed to large out-of-centre foodstores given the current limitations of the town centre retail offer. There is minor outflow to the out-of-centre Tesco in Cleethorpes.** **With the exception of Morrison's, all main foodstores are under-performing given existing competition; there is an over-provision relative to spending capacity.** **Given the high retention levels, existing choice and competition between stores, and the Tesco Immingham commitment which will reduce inflow to the town, the assessment identifies that there is no need for the Council to plan for new provision in the town over the**	**Whilst the town retains nearly all comparison spend arising within the borough (above 75% market share from Cleethorpes, Rural South, Immingham and Grimsby zones), comparatively its performance has declined since 2005 due to increasing competition from out-of-centre foodstores and retail parks.** **The high retention levels reflect the sub-regional comparison retail offer and lack of competition from regional centres. There are deficiencies in the town centre offer with a lack of mid-to-higher range fashion retailers and limited department store provision.** **The assessment therefore identifies the need for the Council to proactively plan to deliver new comparison**

[1] PPS4 practice guidance on need, impact and the sequential assessment published in December 2009. A total of 100 surveys per zone are recommended.

	emerging plan period.	**retail floorspace in the town centre over the emerging plan period.** **It is important within the context of NPPF, that the detailed work undertaken in the 2005 Study and subsequent 2009 Masterplan to identify suitable site opportunities, is taken forward as part of a Development and Delivery Strategy to genuinely establish the physical quantum of retail development that could be accommodated through an extension to Freshney Place shopping centre, constraints to development, timescales and commercial market demand (multiple retailers and developers).**
GRIMSBY (FREEMAN STREET)	**The Asda store within the centre is the most popular store for local residents. However, its market share (and turnover) has decreased since 2005 due to competition from the new out-of-centre Tesco. Asda is complemented by Iceland and Farmfoods stores further along Freeman Street.** **Whilst there are physical issues arising from the connectivity of Asda to the wider centre, the assessment identifies that there is no quantitative or qualitative need for the Council to proactively plan for new convenience retail provision in the centre over the emerging plan period.**	**The centre has an extremely limited comparison retail offer which is borne out by the current survey results which show that it only retains c. 12% of overall comparison spend arising within the Grimsby catchment; the majority of this spend is attributable to Asda which has a significant non-food offer.** **As with Top Town, the centre has faced a significant increase in competition from out-of-centre foodstores and retail parks around Grimsby.** **Given the pre-eminence of Top Town as the sub-regional comparison retail destination, the assessment concludes that there is limited potential for the centre to perform an enhanced comparison shopping role. There are significant vacancies in the centre at present and the overall strategy is for managed consolidation and intervention rather than significant quantitative expansion. There is consequently no need for the Council to plan for new provision over the emerging plan period.**
CLEETHORPES	**The town centre performs an extremely limited convenience retail function (c. 5% retention). The large out-of-centre Tesco store in the town is the main destination for main food shopping (c. 60% retention); this is broadly the same as in 2005. The remaining local residents in the town's catchment look to mainstream foodstores around Grimsby.** **Whilst the Tesco store adequately meets main food shopping needs, the assessment identifies a qualitative based need for a new small to medium sized foodstore in closer proximity to the town centre than the existing Tesco so as to enhance choice and competition for local residents as well as increasing accessibility and facilitating linked trips with the town centre. A deep discount or higher order store would deliver particular benefits if an appropriate sequentially compliant site near to the town centre can be identified.**	**The town centre has an extremely limited comparison retail offer which is orientated towards daily top-up based needs. The survey results identify that the town centre only retains 6% of comparison retail expenditure arising within its immediate catchment; this is comparable to the 2005 Study findings. The majority of local residents continue to look towards Top Town and surrounding out-of-centre provision.** **The assessment identifies that there is limited quantitative need arising in the town over the early phase of the emerging plan period. Whilst more substantive capacity is identified towards the end of the plan period once tourist spend is taken into account, the overriding emphasis should be to continue qualitatively distinguishing the town as a local independent shopping and leisure destination.** **Given the size and secondary nature of the centre in retail terms, Grimsby (Top Town) should be the primary strategic and commercial focus for new comparison retail provision in the borough.**
IMMINGHAM	**The town has an extremely limited convenience offer and the survey results show that it only retains c. 10% of main food spending arising within its immediate catchment; this is comparable with the 2005 Study. Most local residents continue to travel to mainstream foodstores in Grimsby to meet their main food needs.** **Ordinarily, whilst the assessment would advance a clear justification for a new mainstream foodstore in the town to enhance market share by facilitating clawback, there is a long-standing commitment for a new full-**	**Whilst the town has actually increased its overall comparison market share from its immediate catchment to c. 7% from c. 2% in 2005, it continues to have a limited comparison retail offer and attraction. Most local residents continue to look towards Grimsby.** **The delivery of the Tesco-led regeneration scheme, which also includes new retail units and physical enhancements to existing units, will generate significant benefits for the town in terms of broadening the depth of its comparison retail offer. On this basis, the assessment**

	range Tesco store as part of the wider town centre redevelopment scheme. **Given this commitment, there is no need for the Council to proactively plan for new convenience retail provision in the town over the emerging plan period.**	**concludes that there is no overriding need for the Council to proactively plan for new comparison retail provision over the emerging plan period.**

1.6 Overall, the Council should plan for new convenience provision in Cleethorpes and Immingham (realising the Tesco town centre regeneration scheme) so as to address localised needs and balance the network of provision across the borough.

1.7 The clear priority for comparison retailing in the borough is Grimsby Top Town; there is a need to plan for new provision through the emerging plan so as to maintain its attractiveness as a sub-regional destination and provide enhanced competition against out-of-centre foodstores and retail parks which have increased market share at the town centre's expense since the 2005 Study.

LEISURE NEED ASSESSMENT

1.8 In addition to establishing where local residents visited for specific retail goods, the household survey was also structured to obtain information on where people presently go to pursue their main leisure activities. The main conclusions are as follows:

CENTRE	LEISURE
GRIMSBY	**The town centre evening economy offer is focused on traditional 'pubs and nightclubs' and lacks any family orientated facilities with no mainstream cinema; most local residents in the town's immediate catchment visit the out-of-centre Meridian Point in Cleethorpes. There is a clear qualitative-based need for a new cinema in the town centre so as to enhance its offer, increase dwell times and enable it to effectively perform its intended sub-regional function.** **A new cinema would also attract national chain, family orientated restaurants which would further diversify and enhance the town centre leisure offer.** **The assessment therefore identifies the need for the Council through its Development and Delivery Strategy to review commercial demand and potential site opportunities to establish a new town centre leisure quarter; Freshney Place is the sequentially compliant opportunity.**
CLEETHORPES	**The town centre leisure offer comprises traditional evening economy uses including traditional (independent and chain) pubs and restaurants.** **There is no overriding deficiency in provision given the out-of-centre Meridian Point facility which includes a multiplex cinema and bowling alley.** **The assessment identifies that there is no overriding need for the Council to proactively plan for new leisure provision in the town over the emerging plan period; the spatial (borough-wide) priority should be on facilitating enhancements in the leisure offer in Grimsby.**
IMMINGHAM	**The town centre has a limited leisure offer. Given the highly localised catchment which it serves allied to its proximity to Grimsby and Hull, there is no overriding need for the Council to plan for new provision over the emerging plan period.**

1.9 Aside from the need for new provision in Grimsby (Top Town), the study concludes that there is extremely limited need for the Council to proactively plan for new commercial leisure provision across the borough.

STRATEGIC RECOMMENDATIONS

1.10 The main recommendations are as follows:

- **PROPOSED BOROUGH HIERARCHY**; a revised hierarchy is promoted through the emerging plan process with Grimsby Top Town (known as Grimsby town centre) to be identified as a sub-regional centre. Cleethorpes and Immingham are to be town centres with Grimsby Freeman Street downgraded to district centre given the recent (significant) contraction in retail activities.
- **TOWN CENTRE BOUNDARY DEFINITIONS**; significant changes are proposed to for Grimsby Top Town so as to consolidate the centre. A primary shopping area (PSA) is specifically proposed around Freshney Place. Grimsby Freeman Street boundaries are to be significantly rationalised. Minor revisions are proposed for Cleethorpes with the omission of the southern extent of Alexandra Road. Minor changes are proposed for Immingham to reflect the Tesco-led scheme.
- **FRONTAGE POLICIES**; taking account of recently published Government guidance on increasing the flexibility for changing uses, existing defined frontages have been reviewed and revisions proposed for each centre. It is recommended that secondary frontages are discontinued. Managing the concentration of evening economy uses (Classes A3 – A5) should be maintained and strengthened where necessary given the potential social (amenity), environmental and viability (blank day-time frontages) issues arising from such uses.
- **IMPACT THRESHOLD**; a minimum local floorspace threshold of 200 m^2 for assessment is proposed.
- **MONITORING AND MANAGING**; the Council should continue to actively monitor its centres through (amongst others) regular on-site surveys and maintaining schedules of planning commitments.