North East Lincolnshire Local Plan: Retail and Leisure Study

Main Report

On behalf of **North East Lincolnshire Council**

Project Ref: 332611518 | Rev: - | Date: October 2024

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For and on behalf of Stantec UK Limited				

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1 Introduction

1.1 Purpose of the Study

1.1.1 Stantec UK Ltd[1] is commissioned by North East Lincolnshire Council to undertake the North East Lincolnshire Local Plan Retail and Leisure Study on its behalf. The purpose of the study is to update the retail and commercial leisure evidence base to support the preparation of the Local Plan Review. In this main report, we provide our quantitative assessment of retail needs arising over the period to 2042, informed by a new telephone survey of households which establishes current retail and leisure expenditure patterns. We also provide our qualitative assessment of retail and leisure needs, informed by our visits to North East Lincolnshire's defined centres.

1.1.2 In accordance with the Council's brief, this report contains:

- a review of national and local planning policies;
- an overview of national trends in the retail and leisure markets;
- health checks (which we refer to as 'performance analyses') of the three main defined centres in North East Lincolnshire (Grimsby, Cleethorpes and Immingham), and Freeman Street District Centre;
- an overview of current shopping and leisure expenditure patterns based on up-to-date survey data, which establishes current market shares for defined centres and other destinations;
- a quantitative assessment of retail floorspace requirements in both the convenience and comparison goods retail sectors up to 2042, taking into account the latest population and expenditure data, and the effects of multi-channel retailing (the most significant of which is online shopping);
- a qualitative assessment of retail and leisure needs, informed by our visits to North East Lincolnshire's centres; and
- policy recommendations in respect of the long-term vitality and viability of centres within North East Lincolnshire's network.

1.2 Structure of the Report

1.2.1 The remainder of our report is structured as follows:

- Section 2 sets out the policy and legislative context and the implications for North East Lincolnshire's centres;
- Section 3 summarises key market and economic trends of relevance to planning for town centres;
- Section 4 provides our health check assessments of the three main centres in North East Lincolnshire (Grimsby, Cleethorpes and Immingham), and Freeman Street District Centre;

[1] Hereafter referred to as 'Stantec'

- Section 5 summarises current patterns of retail and leisure spending by study area residents, based on the household telephone survey;

- Section 6 contains our assessment of quantitative and qualitative requirements for additional retail floorspace;

- Section 7 contains our assessment of the scope for additional commercial leisure uses across the study area; and

- Section 7 provides a summary of our findings and recommendations.

2 Policy and Legislative Context

2.1 National Planning Policy Framework

2.1.1 The National Planning Policy Framework ('NPPF') sets out the Government's planning policies for England and how they should be applied. The NPPF provides a framework within which locally prepared plans can provide for sufficient development in a sustainable manner.

2.1.2 The original NPPF was published by the (then-named) Department for Communities and Local Government on 27 March 2012. The NPPF has been revised on multiple occasions and the latest update was published by the Ministry of Housing, Communities and Local Government ('MHCLG') in December 2023. On 30 July 2024, MHCLG announced significant proposed changes to the country's planning system and published both its consultation on changes to the NPPF as well as the draft text for consultation. Whilst the new NPPF will not be published for several months, the draft version signifies the likely future direction of the new Government's planning policy.

2.1.3 It is important to note, however, that the proposed changes to the NPPF relate to matters such as Green Belt and planning for homes, whereas no changes are proposed to Section 7 of the NPPF ('Ensuring the vitality of town centres') aside from updated paragraph numbers.

Ensuring the vitality of town centres

2.1.4 Paragraph 90 of the NPPF (December 2023 version) states 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.'* To this end, local planning authorities should *'define a network and hierarchy of town centres and promote their long-term vitality and viability.'* The NPPF puts particular emphasis on allowing town centres to *'grow and diversify'* in response to changes in the retail and leisure markets and through enabling a suitable mix of uses (including housing).

2.1.5 The NPPF also requires local planning authorities to define the extent of town centres and primary shopping areas, retain and enhance existing markets and 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.

2.1.6 Paragraph 90 requires local planning authorities to apply a sequential test to planning applications for main town centre uses which are neither in an existing centre nor in accordance with an up-to-date plan. Priority should be given to town centres, then edge-of-centre locations and, only if suitable sites are not available (or expected to become available within a reasonable period), should out-of-centre sites be considered.

2.1.7 Chapter 7 goes on to state that *'when assessing applications for retail and leisure development outside town centres, which are not in accordance with an up-to-date plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500m² of gross floorspace).'*

Promoting healthy and safe communities

2.1.8 Paragraph 96 of the NPPF (December 2023) notes that planning policies and decisions should aim to achieve healthy, inclusive and safe places which, inter alia, promote social interaction through, for example, mixed-use developments, strong neighbourhood centres and active street frontages. Local planning authorities should plan positively for the provision of community facilities (such as local shops), guard against the unnecessary loss of facilities and services which enable communities to meet their day-to-day needs and ensure these shops, facilities and services are able to develop and modernise.

2.2 Planning Practice Guidance

2.2.1 The original Planning Practice Guidance ('PPG'), which accompanies the NPPF, was published by the Government on 3 March 2014. The PPG on 'Town Centres and Retail', which was last updated in September 2020, provides further guidance on:

a. planning for town centre vitality and viability;

b. permitted development and change of use in town centres; and

c. assessing proposals for out-of-centre development.

2.3 Local Planning Policy

2.3.1 North East Lincolnshire Council is preparing a Local Plan Review, with a plan period to at least 2042. The Council's retail and leisure evidence base therefore needs updating, to take account of the latest trends in home / online shopping, recent changes in the composition of uses within town centres and up-to-date population and retail expenditure forecasts.

2.3.2 The current principal planning policy document for the Borough is the North East Lincolnshire Local Plan 2013 to 2032 (adopted 2018).

North East Lincolnshire Local Plan 2013 to 2032

2.3.3 The spatial vision states that, by 2032, North East Lincolnshire will have a strong leisure offer and town centres will be successful, having developed their offer to support growth.

2.3.4 The Place Statement for 'Urban Area (Grimsby and Cleethorpes)' notes that, by 2032, communities will have good access to retail facilities and Grimsby will have strengthened its role as the sub-regional centre, with an expanded retail and leisure offer and an improved townscape on account of environmental enhancement. Cleethorpes will have built upon its role as a regional tourist destination, enhancing the quality and diversity of its offer to visitors.

2.3.5 The Place Statement for 'Estuary Zone' (which includes the port town of Immingham) explains that Immingham will have strengthened its role as an independent town, having been redeveloped to provide new retail facilities and have a community focus. Environmental improvements and enhancements to healthcare and education facilities will have revitalised the town and sustained its role in supporting the needs of surrounding villages.

2.3.6 Strategic Objective 8 ('Town centres and local facilities') focuses on strengthening the vitality and viability of town centres, meeting the needs of retail, commercial and leisure uses, focusing appropriate uses on town centre sites, promoting regeneration where appropriate and supporting the retention of local community and service facilities.

2.3.7 Local Plan Policy 23 ('Retail hierarchy and town centre development') explains that development proposals within the defined centres will be supported where they accord with the following retail hierarchy:

a. Sub-regional centre – Grimsby

> *Development that continues to support the centre's sub-regional role, and which extends the range and quality of facilities and services offered will be encouraged;*

b. Main town centre – Cleethorpes

Development that supports the viability and vitality of the town centre, and strengthens the association of the commercial core and resort area will be encouraged, with the aim of broadening the town centre's appeal;

c. Small town centre – Immingham

Development that supports the role of the town centre, and which extends the range and quality of facilities and services offered reflecting its location at the heart of the employment growth proposed, will be encouraged;

d. District centre – Freeman Street, Grimsby

Development that supports the consolidation and redefining of the centre as a district centre will be encouraged, particularly where this broadens the range, and quality of facilities, services and cultural activities; and,

e. Local centres

Development that respects the individual local scale and character of the centre will be supported.

2.3.8 Policy 23 notes that, within Grimsby, Cleethorpes and Immingham, the Council will encourage and support mixed use development that adds to town centre vitality and viability and extends the evening economy. The policy then lists what the Council considers to be acceptable town centre uses.

2.3.9 The policy goes on to say that proposals for main town centre uses, specifically retail and leisure uses comprising 200 sq.m gross or more, in any location outside the defined primary shopping frontages, will only be acceptable if it is demonstrated that:

a. The development cannot be accommodated on a suitable site within first, the identified primary shopping frontages, then, within the defined town centre boundary, including identified opportunity sites, or finally, close to the town centre boundary (sequential test); and

b. The proposed site is accessible and well-connected to the town centre; and,

c. Development will not adversely impact upon the vitality and viability of any of the town centres (impact test) having regard to:

i. Committed, planned or proposed public and private investment in the town centres;

ii. Evidence as to retail expenditure capacity which shows that the development would not adversely impact upon consumer choice and existing town centre trading levels.

2.3.10 Policy 24 ('Grimsby town centre opportunity sites') and Policy 25 ('Cleethorpes town centre opportunity sites') identify opportunity sites within the respective defined town centre boundaries which are capable of accommodating future needs.

2.3.11 Policy 26 ('Primary shopping frontages') permits non-retail development at ground floor level within the defined primary shopping frontages so long as no more than a third of the individual units are used for non-retail uses. The consideration of the proportion of units is different for each centre.

2.3.12 Policy 27 (‘Freeman Street district centre’) seeks to encourage and support mixed use development that adds to the vitality and viability of the centre and extends the offer to a broad spectrum of the population. Policy 27 goes on to list the specific uses that are acceptable in principle and states that the Council will support and promote approaches which seek to improve pedestrian connectivity between Freeman Street and the Asda superstore.

2.4 Policy and Funding Response

2.4.1 Over the past decade or so, a considerable number of studies and other initiatives have assessed the future role and function of town centres, and the UK Government has set up numerous funding pots to, inter alia, regenerate town centres and high streets. These include:

- The Portas Review, Mary Portas (2011)
- The Grimsey Review, Bill Grimsey (2013)
- Beyond Retail: Redefining the Shape and Purpose of Town Centres, British Council of Shopping Centres (2013)
- 21st Century High Streets, British Retail Consortium (2013)
- The Future of High Streets, Department for Communities and Local Government (2013)
- Accommodating Growth in Town Centres (2014), Greater London Authority
- Digital High Street 2020 Report, Digital High Street Advisory Board (2015)
- Grimsey Review 2: ‘It’s time to reshape our town centres’ (2018)
- The Future High Streets Fund (2019)
- Towns Fund (2019)
- High Streets Heritage Action Zones (2019)
- Build Back Better High Streets (2021)
- The Levelling Up Fund Rounds 1 (2021), 2 (2022) and 3 (2023)
- The UK Shared Prosperity Fund (2022)
- Our Long-Term Plan for Towns (2023)

The Portas Review

2.4.2 In May 2011, retail expert Mary Portas was appointed by the former Coalition Government to lead an independent review into the future of the high street in response to the decline of town centres nationally, seen as a consequence of reduced spending on the high street. The report supported the call to strengthen planning policy in favour of ‘town centre first’ and included 27 separate recommendations to tackle the further decline of the high street.

2.4.3 The core recommendations included measures to strengthen the management of high streets, improvements to the business rates system, reducing car parking charges, placing greater onus on landlords to proactively manage their assets or face the use of compulsory purchase powers by local authorities, and to increase community involvement in town centres.

2.4.4 As well as 24 ‘Portas Pilot’ towns to trial the recommendations, the Coalition Government established the future High Streets Forum to implement Portas’s recommendations and provided funding to establish business improvement districts and a 'Future High Street X Fund' (renamed the High Street Renewal Fund) to reward towns delivering innovative plans to promote their town centres.

The Grimsey Review and The Grimsey Review 2

2.4.5 Bill Grimsey, the former managing director of DIY chain Wickes and food retailer Iceland, published his report as an 'alternative response' to the recommendations of the Portas Review. The report made a total of 31 wide-ranging recommendations, including encouraging more people to live in town centres, appointing a High Streets Minister, and freezing car parking charges for a year.

2.4.6 Grimsey followed up his original report with a review that was published in July 2018, which was particularly influenced by the high-profile collapse of retailers and some food and drink operators. Grimsey asserted that town centres were facing their greatest challenge in history, and that towns must stop trying to compete with out-of-town shopping parks that are convenient and benefit from free parking. Instead, Grimsey argued that town centres must create their own unique reason for communities to gather there – being interesting, engaging and offering a compelling and great experience.

2.4.7 Whilst it is not appropriate to have a one-size-fits-all approach, Grimsey set out 25 recommendations to tackle the problems he identified. Key recommendations include:

- Replacement of business rates with a fairer and less complex system;
- Creation of a digital commission to develop a 20-year strategy for local high streets;
- Accelerating the digital transformation of smaller towns;
- Appointment of high-quality designers to celebrate the local identify of town centres;
- Free short-term parking; and
- Improved public realm and free Wi-Fi

Beyond Retail

2.4.8 Following the Portas Review, the Government supported the establishment of an industry task force to analyse retail property issues relating to town centres. The findings of the task force's report were presented in the 'Beyond Retail' report of 2013.

2.4.9 One of the report's key observations was that the trend towards market polarisation (discussed further below) has resulted in three broad types of town centre offer: strong centres with a wide retail and leisure offer; convenience food and service-based centres with an element of fashion and comparison goods; and localised convenience and everyday needs-focused centres. The report made a number of recommendations, including:

- Strong and dynamic leadership is required, led at the local authority level and with business and community involvement, to bring about long-term change in town centre function.
- Bold, strategic land assembly should be undertaken, to assemble redevelopment opportunities of scale and worth.
- Greater flexibility in the planning system should be provided, to enable vacant retail premises to be converted to 'more economically productive uses'.
- Mechanisms should be considered to address funding gaps to encourage local authorities to commit to long-term planning for town centres.

- Town centres must take advantage of technology to assist in marketing, driving footfall, and assisting independents and SMEs.
- The business rate system should be reviewed, alongside publication of new retail valuation guidance.

21st Century High Streets

2.4.10 In 2013, the British Retail Consortium published the second '21st Century High Streets' report as an update to the original report published in 2009. The 2013 report made various policy recommendations to help secure 'flourishing 21st Century high streets', under six key topics:

- A unique sense of place: local partnerships, authorities and retailers must create a brand for the town centre to engender consumer loyalty through differentiation.
- An attractive public realm: local partnerships and authorities must actively manage the public realm and create attractive public space.
- Planning for success: local authorities should develop a clear strategic vision focused on the role of the town centre and cooperate with neighbouring authorities to maintain viable and complementary retail destinations.
- Accessibility: local authorities should manage accessibility holistically and responsively and should provide adequate parking to assist in driving footfall.
- Safety and security: local police should work with retailers to better understand the impacts of retail crime to promote town centres as safe, secure and effectively managed.
- Supportive regulatory and fiscal regimes: central government should reform the Business Rate Multiplier to reduce the cost of operating and investing in town centres.

The Future of High Streets

2.4.11 The Future Spaces Foundation was established in 2013, made up of a diverse independent panel of experts to generate new ideas about how to create social and economic opportunity through the transformation of the built environment.

2.4.12 The Future of High Streets report (2013) sought to examine the high street debate from a holistic stance; it assessed the full range of socio-economic, demographic and technological factors which affect how we interact with high streets, and it sought to challenge the traditional role of retail in town centre regeneration. The report made 14 specific recommendations under four key policy areas relating to public services and community cohesion, commercial drivers, transport and accessibility and health and well-being. The recommendations included:

- re-concentrating public services in and around the high street to harness agglomeration benefits;
- diversifying community spaces beyond their traditional functions;
- supporting a mobile-enabled high street;
- flexible use of space to mix retail, leisure and work dynamically to suit modern lifestyles;
- de-stigmatising bus travel, so that it provides a superior alternative to the car;
- transport infrastructure design with multiple uses to give it a fluid role in the town centre;

- providing housing, particularly assisted living, within easy access of high streets; and
- providing health services in close proximity to the high street.

Digital High Street

2.4.13 The Digital High Street Advisory Board was established following the work of the Future High Streets Forum to consider the revolutionary impact of digital technologies on future success of high streets. The Advisory Board's report of 2015 made four principal inter-related recommendations, which sought to revitalise high streets in a digitally dominated world. The recommendations included raising connectivity standards and increasing the deployment of digital technology, improving digital skills, and adopting a digital health index to assess the competitiveness of high streets, to measure the economic value of digital developments and set goals for digital integration.

The Future High Streets Fund

2.4.14 In July 2019, the Secretary of State for Housing, Communities and Local Government asked Sir John Timpson to consider structural changes to high streets and make recommendations on how to support local areas to respond to those changes. In the run-up to the Budget, Sir John made two main recommendations to the Chancellor and the Secretary of State: to set up a High Streets Taskforce to support local leadership, and to establish a new fund to support the renewal and reshaping of high streets and town centres.

2.4.15 The Chancellor and the Secretary of State agreed with Sir John's diagnosis and recommendations. Therefore, to respond, a new £1 billion Future High Streets Fund ('FHSF') was set up to help local areas to respond to and adapt to the changes. The FHSF aimed to support local authorities to prepare long-term strategies for their high streets and town centres, including funding a new High Streets Taskforce to provide expertise and hands-on support to local areas.

2.4.16 Applicants were asked to provide proposals setting out the overall vision that they wish to achieve for their high street and town or city centre and specific, transformational interventions that would contribute to that overall vision.

2.4.17 North East Lincolnshire Council and Freshney Place[2] applied for central Government funding via the FHSF. The bid focused on attracting a new leisure and family audience, whilst still accommodating the needs of existing retailers and traders. The vision centred around developing a strong leisure and entertainment offer, which included a cinema and quality food and beverage outlets, alongside an attractive public space. The plans also included an improved Top Town Market, the creation of a New Market Square and a revitalised Freshney Place. North East Lincolnshire was awarded £17.3 million from the FHSF for Grimsby Town Centre.

Towns Fund

2.4.18 In September 2019, the Government invited 100 places to develop proposals for a Town Deal, as part of the £3.6 billion Towns Fund, including the £1 billion fund designated as part of the FHSF. The objective of the Fund was to drive the economic regeneration of towns to deliver long term economic and productivity growth through urban regeneration, planning and land use; skills and enterprise infrastructure; and connectivity.

2.4.19 Grimsby was one of the 100 places invited to develop proposals for a Town Deal. Set up in 2016 to drive the development of Grimsby's original pilot Town Deal, the Greater Grimsby Board is responsible for steering the development of the town's regeneration plans. In 2020, the Grimsby Town Centre Masterplan was developed and from this a Town Investment Plan

[2] The Council now owns Freshney Place Shopping Centre (and the adjacent former House of Fraser store), which together comprise a substantial part of Grimsby Town Centre.

('TIP') was created. The TIP sets out the vision and strategy for the town and identifies those projects which are needed to deliver economic growth over the next decade. The TIP was submitted to Government in October 2020. In March 2021, Grimsby was awarded £20.9 million from the Towns Fund to deliver six projects from the TIP, which include:

- The Activation and Community Engagement Fund, launched on 9 November 2021, for delivery over a 3-year period. This is a local grant programme for community and local business-based initiatives which create diversification of activity within the town centre.
- The development of a new public square at Riverhead Square (phase 1 of this work is already complete following an early award of £1 million of Government funding).
- Better pedestrian and cycle loops to connect the town centre and Alexandra Dock.

High Streets Heritage Action Zones

2.4.20 In May 2019, Historic England launched a multi-million pound fund to enable it to work with partners to find new ways to champion and revive historic high streets through the High Streets Heritage Action Zones scheme. Some 68 high streets across England were selected to receive a share of the £95m fund.

2.4.21 The Greater Grimsby Heritage Action Zone was part of a package of regeneration plans which encompassed the Kasbah (an historic portside area of smoke houses, shops and warehouses associated with the fishing industry), Alexandra Dock and the town centre. Over the last five years, 11 empty and neglected buildings on the Kasbah have been repaired and brought back into use, the West Craven Maltings buildings are being developed to create the Onside Horizon Youth Zone and a vibrant new space for events and activities has been created around St James's Minster. Work is still ongoing regarding these Heritage Action Zone projects.

Build Back Better High Streets

2.4.22 In July 2021, the MHCLG published the Build Back Better High Streets Strategy, which set out the Government's long-term plan to support the evolution of high streets into thriving places to work, visit and live. The Strategy called into question what the high street of the 21st century should look like following the onset of the COVID-19 pandemic, which magnified and accelerated existing trends – such as the shift to online shopping and the blurring of home and office working – and brought about great change.

2.4.23 The Strategy set out how the Government will build on innovations seen over the pandemic and provide the regulatory flexibility that will enable high streets to be the hives of economic and social activity. Five key priorities were identified:

iii. breathing new life into empty buildings;

iv. supporting high street businesses;

v. improving the public realm;

vi. creating safe and clean spaces; and

vii. celebrating pride in local communities.

The Levelling Up Fund

2.4.24 The £4.8 billion Levelling Up Fund was set up to invest in infrastructure that helps to bring pride to local communities and bring more places across the UK closer to opportunity. The fund focused on three investment themes, namely: local transport projects that make a genuine difference to local areas; town centre and high street regeneration; and support for maintaining and expanding the UK's world-leading portfolio of cultural and heritage assets. The fund prioritised bids that invested in regeneration and growth in places in need and areas of low productivity and connectivity.

2.4.25 The first round of the Levelling Up Fund supported £1.7 billion of projects in 105 local areas across all corners of the UK. Lincolnshire's 'A16 Corridor Improvements' bid was awarded just over £19.5 million in funding.

2.4.26 The second round of the Levelling Up Fund focused on the same three investment themes as the first round, and a total of 111 areas were awarded a share of £2.1 billion. North East Lincolnshire Council was awarded approximately £18.4 million to deliver the Cleethorpes Masterplan, and £20m to secure the remodelling of a significant part of Grimsby Town Centre.

2.4.27 The third round of the Fund provided a further £1 billion of direct investment in communities.

The UK Shared Prosperity Fund

2.4.28 The UK Shared Prosperity Fund ('UKSPF') is a central part of the UK Government's Levelling Up agenda, providing £2.6 billion of new funding for local investment by March 2025. Unlike the Levelling Up Fund, all areas of the UK received an allocation from the Fund via a funding formula. This approach recognises that even the most affluent parts of the UK contain pockets of deprivation and need support. The UKSPF is the Government's replacement funding for previous European Union investments. Unitary authorities in England, like North East Lincolnshire Council, received funding from both the core UKSPF and for the adult numeracy programme, Multiply. In total, North East Lincolnshire received over £6.2 million. The Council ringfenced some of the funding to procure business support programmes, campaigns to encourage visits, promotion of the visitor economy, and local arts, cultural and heritage, and to creative activities. The remainder of the funding was opened up for expressions of interest to deliver activities across the three core strands of Communities and Place, Supporting Business and People and Skills.

Our Long-Term Plan for Towns

2.4.29 In October 2023, the Department for Levelling Up, Housing and Communities published 'Our Long-Term Plan for Towns', a prospectus which sets out a new plan to put local people at the centre of their town's success and give them the long-term funding to achieve this. The Government identified 55 towns to benefit from Long-Term Plans, backed by £1.1 billion funding. Each town will:

- Develop a Long-Term Plan to invest in and regenerate their town, based on the priorities of local people, and put to local people for consultation.
- Receive £20 million in endowment-style funding and support over ten years to support the Town Plan, to be spent on issues that matter to local people, including regenerating high streets and securing public safety.
- Establish a Town Board to bring together community leaders, employers, local authorities, and the local MP to oversee and deliver the Long-Term Plan.
- Use a toolkit of powers, from tackling anti-social behaviour to auctioning empty high street shops, reforming licensing rules on shops and restaurants and supporting more housing in town centres.

2.4.30 Grimsby is one of the 55 towns which will benefit from a Long-Term Plan. The aim is to transform the town centre into a central hub where people and families can visit and enjoy. Residents were asked to share their vision of the 'best possible' future for the town during a survey in May-June 2024, and how the area could be improved with the new funding.

2.5 Implications for North East Lincolnshire

2.5.1 The research and initiatives summarised above contain a number of recurring themes which will be important to consider in the context of future development for main town centre uses in North East Lincolnshire, including:

- The need for flexibility – town centre accommodation needs to be adaptable to a number of uses to address future needs. This presents both opportunities and challenges for the defined centres in North East Lincolnshire. The previous orthodoxy of protecting former A1 retail uses within Primary Shopping Areas may unwittingly be restricting the ability of town centres to diversify and develop distinctive identities and associated offer to consumers.

- Vital and viable centres need a varied mix of uses – town centres are increasingly diverse following the emergence of a greater proportion of leisure, food and drink uses. There is also an identified need to concentrate multi-functional public services in town centre locations to realise agglomeration benefits (as per 'The Future High Street' report published in 2013). Town centres, however, face growing competition from retail parks and higher order centres as well as online shopping.

- Increasing residential floorspace within town centres is important to their overall vibrancy, to encourage footfall within centres throughout the day and during the evening.

- Encouraging workers to return to their town centre offices – the rise of hybrid working as a result the COVID-19 pandemic has led to reduced footfall within town centres, with a knock-on effect on spend in cafés, restaurants, bars and shops.

- Introducing a range of measures to bring vacant units back into productive use.

- The role of each defined centre needs to be clearly articulated to provide it with a distinct and recognisable identity appropriate to its role, as emphasised by the '21st Century High Streets' report as well as the Portas Review and, more recently, the guidance associated with the FHSF and the Towns Fund. It will be important to identify the unique attributes of each of North East Lincolnshire's defined centres during the production of the new Local Plan.

2.6 General Permitted Development Order ('GPDO')

2.6.1 The Government announced in April 2021 that it would introduce a new permitted development right to the GPDO, known as Class MA, to allow properties within Use Class E ('Commercial, business and service uses') – which includes retail – to convert to residential use. The Class MA permitted development right was introduced on 1 August 2021 and applies to buildings which have been vacant for at least three continuous months prior to submission of the prior approval.

2.6.2 Class MA builds on the flexibility created by the Government's introduction of the new Use Class E in September 2020, which merged Use Classes A1, A2, A3, B1, B2, D1 and D2 into Use Class E. Under Class E, buildings could already change uses within the same Use Class without requiring planning permission, and Class MA extends that list of uses to include residential.

2.6.3 Since the introduction of the new permitted development rights, local planning authorities have had the opportunity to put in place a new set of Article 4 Directions if they want to limit the ability of owners to change the use of their properties without the need for planning permission.

2.6.4 Paragraph 53 of the NPPF (December 2023 version) states that:

> *'The use of Article 4 direction to remove national permitted development rights should, where they relate to change from non-residential use to residential use, be limited to situations where an Article 4 direction is necessary to avoid wholly unacceptable adverse impacts (this could include the loss of the essential core of a primary shopping area which would seriously undermine its vitality and viability, but would be very unlikely to extend to the whole of a town centre).'*

2.6.5 It is clear that the threshold for which Article 4 Directions should be proposed is high and that Article 4 Directions should only be used in exceptional circumstances.

2.6.6 Planning authorities are still required to understand and plan for their retail needs regardless of the amendments to the Use Classes Order and the GPDO referred to above. Nonetheless, the amendments to the Use Classes Order and the GPDO are likely to have some impact on retail floorspace given the flexibility now given to change between uses within Use Class E, and to residential.

3 Market and Economic Trends

3.1 Introduction

3.1.1 The Retail and Leisure Study has been undertaken in the midst of a renewed focus on the changing role and function of town centres. It is widely accepted that the traditional role of town centres has been undermined by the continued attraction of out-of-centre retail locations, the growth in popularity of multi-channel shopping, recent socio-economic events and the associated decline in expenditure growth. In this section of our report, we highlight some of these challenges in order to set the context for the remainder of the report.

3.1.2 There has been ongoing restructuring in the retail and commercial leisure market for many years, accelerated by events such as the global financial crisis in 2008 and the more recent COVID-19 pandemic. Online sales have continued to rise, most developers are building less retail floorspace in line with reducing operator demand, and existing floorspace is being converted into alternative uses. After the Government declared a national emergency due to the onset of COVID-19, high streets in the UK were initially forced to close in March 2020, and again following several temporary easings of restrictions. Whilst high streets have re-opened, some retailers did not return, or have rationalised their store portfolio.

3.1.3 Previous rules on social distancing and Government guidance to work from home, the latter of which ended in late January 2022, led to reduced custom in town centres[3]. Many employers have moved to ‘hybrid’ working arrangements, with employees able to work from home for several days each week. These factors have created enormous challenges for town centres. Getting back to and then maintaining pre-COVID-19 levels of vitality and viability should be the objective for most town centres.

3.1.4 Below, we discuss the key trends of the last few years; we set out the main economic recovery scenarios; and we predict the likely implications of the COVID-19 pandemic.

Brexit

3.1.5 In 2019, the UK economy grew at its slowest rate in seven years, which was largely attributed to the uncertainty surrounding Brexit negotiations and a weaker global economy. The small growth in the UK economy was reflected in consumer spending, which only increased by 1.2 per cent, the smallest increase in eight years[4]. Low consumer confidence and lacklustre income growth was blamed for the disappointing growth in consumer spending.

3.1.6 Brexit-related uncertainty was expected to end in 2022; however, it still remains in parts of the economy as new legislation and regulations are created. Over the medium term, the forecast assumes an orderly adjustment to the new trading environment (in which there will be enhanced custom checks).

3.1.7 In the longer term, it is expected that the outlook for retail sales volumes will be more favourable with the removal of Brexit and COVID-19 related uncertainty and a strengthening economic backdrop. However, the weakened financial positions of households, businesses and Government will be a constraint[5].

3.1.8 The long-term economic consequences of Brexit will depend on how the UK-EU’s new trading relationship evolves.

[3] In NPPF terms, ‘town centre’ is the catch-all phrase for defined centres of all scales including city centres, town centres, district centres and local centres
[4] Experian, Retail Planner Briefing Note 17, February 2020
[5] Experian, Retail Planner Briefing Note 21, February 2024

Russia-Ukraine Conflict and Inflation

3.1.9 The Russian invasion of Ukraine early in 2022 sent shock waves through the business community, which had been in the early stages of recovery following the lifting of COVID-19 restrictions. Experian's most probable long-term economic scenario assumes that the conflict in Ukraine continues but that no further sanctions on or from Russia are imposed[6].

Retail Sales

3.1.10 Retail sales volumes across Great Britain increased significantly upon the opening of non-essential retail in April 2021 and remained high during the first half of 2021 before diminishing as consumers spent less on durable goods and more in areas of the economy that had, up until that point, been 'locked down', such as travel and leisure.

3.1.11 More recently, retail sales volumes are estimated to have decreased by 1.2 per cent in June 2024 following a rise of 2.9 per cent in May 2024. Volumes fell by 0.2 per cent over the year to June 2024 and were 1.3 per cent below their pre-pandemic level in February 2020. Sales volumes fell across all sectors except automative fuel. Non-food stores sales volumes (the total of department, clothing, household, and other non-food stores) fell by 2.1 per cent in June 2024, following a rise of 3.3 per cent in May 2024. All sub-sectors fell over the month, with strong downward contributions from department stores, clothing and footwear retailers, and furniture stores. Retailers put this down to election uncertainty, poor weather, and low footfall affecting sales. Online spending values fell by 2.7 per cent during June 2024 but rose by 2.3 per cent when compared with June 2023. The proportion of sales made online decreased slightly from 27.5 per cent in May 2024 to 27.1 per cent in June 2024[7].

Store Closures

3.1.12 Table 3-1 below shows the net changes in Great Britain's retail units per year from over the 2013 to 2023 period. In 2023 there was a net loss of 7,770 retail units across Great Britain, representing the ninth consecutive year that the trend of a net loss of retail units had persisted[8].

3.1.13 The data below show that there were 55,514 store closures in 2023, which is an increase of 17.0 per cent when compared with the number of store closures in 2013. Between 2013 and 2023, the net change in GB retail units was minus 52,406, which is clearly a substantial loss of retail units and reflective of the general trend of decline in demand for physical floorspace as the market share of online shopping continues to rise.

Table 3-1: Net change in GB retail units by year 2013-2023

Year	Store Openings	Store Closures	Net Change in GB Retail Units
2013	49,496	47,456	2,040
2014	47,624	47,514	110
2015	47,042	47,380	-338
2016	45,986	47,636	-1,650
2017	45,274	50,767	-5,493
2018	43,278	50,828	-7,550
2019	44,883	54,052	-9,169
2020	39,060	50,379	-11,319

[6] Experian, Retail Planner Briefing Note 21, February 2024

[7] Office for National Statistics ('ONS'), released 19 July 2024, ONS website, statistical bulletin, https://www.ons.gov.uk/businessindustryandtrade/retailindustry/bulletins/retailsales/june2024

[8] Local Data Company, FY 2023 Retail and Leisure Trends Analysis, March 2024

Year	Store Openings	Store Closures	Net Change in GB Retail Units
2021	43,167	51,069	-7,902
2022	45,329	48,694	-3,365
2023	47,744	55,514	-7,770
2013-2023	**498,883**	**551,289**	**-52,406**

3.1.14 There was a decrease in the vacancy rates for retail parks and shopping centres between H2 2022 H2 and 2023 H2, whereas the high street vacancy rate increased during the same period. The demand for retail park units saw vacancy rates fall from 9.0 per cent in 2022 H2 to 7.6 per cent in 2023 H2. Vacancy rates within this retail location type are currently 0.5 percentage points below the pre-pandemic figure (8.1 per cent in 2019 H2), and a further decrease is expected in 2024 as occupiers continue to expand their out-of-centre footprint[9]. Strong demand for retail park units is likely to boost rental growth.

3.1.15 The average vacancy rate at retail parks (7.6 per cent) is significantly lower than the vacancy rates for high streets and shopping centres (14.0 per cent and 17.7 per cent, respectively). The vacancy rate for shopping centres has continued to fall from its 2021 H1[10] peak of 19.4 per cent, to 17.7 per cent in 2023 H2[11], which is due to the success in attracting occupiers with rebased rents. There was only a 0.1 percentage point decrease in unit vacancy from 2023 H1 to H2, however, which has been attributed to the challenging economic and consumer climate.

3.1.16 High streets have struggled to recover as much as the other retail location types. They were the only location type to see an increase in vacancy rates in 2023 – from 13.9 per cent in 2023 H1 to 14.0 per cent in 2023 H2 – which is due to rising interest rates, inflation and decreasing consumer spend. Moreover, high streets contain a significantly higher proportion of independent retailers compared with the other retail location types, with 68 per cent of all high street units being occupied an independent retailer[12].

Online Shopping/Special Forms of Trading

3.1.17 Figure 3-1 shows the market share of special forms of trading ('SFT', which includes online shopping) in both the convenience and comparison retail sectors up to 2022 and forecast to 2039. Experian defines SFT as any non-store retailing including internet sales, mail order sales, market stalls, vending machines, door-to-door selling and telephone sales. Internet sales account for a large proportion of SFT.

3.1.18 The market share of SFT in both the comparison and convenience retail sectors has been increasing year on year and this trend accelerated in 2020 and 2021 as lockdowns and COVID-19 related fears made in-person shopping off limits or less desirable. The market share of SFT in the comparison retail sector peaked at an average of 29.4 per cent in 2020; however, as COVID-19 restrictions eased this dropped back to an average of 23.6 per cent in 2022. A further small decline was expected in 2023, with certain online users (particularly older, less digitally literate cohorts) reverting back to traditional shopping habits (albeit most of the increase in the market share of SFT seen during the pandemic remains).

3.1.19 Figure 3-1 shows that, from 2024, the market share of SFT in both the comparison and convenience retail sectors is expected to resume an upward trajectory, with SFT's market share in the comparison retail sector expected to reach just shy of 30 per cent by 2039.

[9] Local Data Company, FY 2023 Retail and Leisure Trends Analysis, March 2024

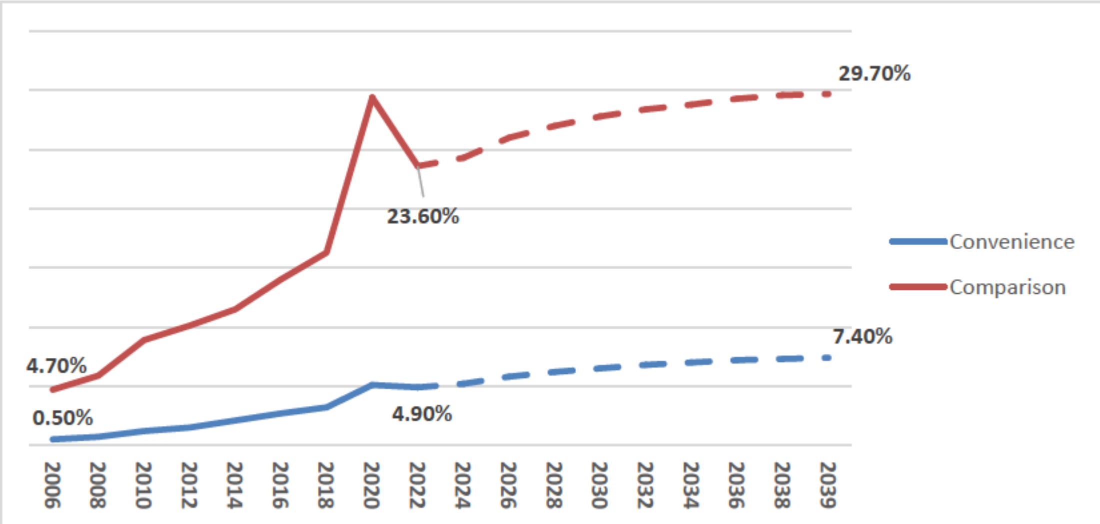
[10] Any references to 'H1', 'H2' and so on are shorthand for 'the first/second half of year X', and 'Q1', 'Q2' and so on is used to denote 'the first/second quarter of year X'.

[11] Ibid.

[12] All non-vacant units.

3.1.20 SFT's market share is increasing more sharply within the comparison retail sector than in the convenience retail sector. One of the reasons is because foodstore operators find it difficult to make online shopping profitable. The obvious implication of this is that less comparison retail floorspace will be required and, as we go on to explain later in our report, SFT's market share across the study area defined for this study is already much higher than the national average (for comparison goods expenditure).

Figure 3-1: Actual and projected market share of non-store retail sales/SFT (adjusted for SFT sales from stores)



Source: Experian Retail Planner Briefing Note 21 (February 2024). Figure 5, Appendix 3.

3.1.21 Generally speaking, the performance of the high street retail sector is weakening. Consequently, many local authorities will need to consider condensing and concentrating the defined retail area in their town centres, and consider the best ways of introducing and expanding alternative uses, such as residential and office uses.

Commercial Retail Rents

3.1.22 Average retail rental values have grown very modestly since 2022 following three years of decline. In the 12 months to June 2024, average retail rents grew by 0.8 per cent; however, these values remain nearly 17 per cent below their previous peak in 2018. The trend in retail rental values varies significantly depending on the type of property and location. Average rents for high street shops fell by approximately 29 per cent between May 2018 and May 2023, but there was modest growth of 1.1 per cent over the year to June 2024. Average shopping centre rental values have continued to fall on an annual basis. Rents fell by 1.3 per cent over the 12 months to June 2024, albeit performance has steadily improved from a recent low of -2.4 per cent in February 2024[13].

3.2 Convenience Retail Sector

3.2.1 Prior to the global financial crisis, the convenience goods retail sector was a key driver of growth in the retail sector. The original 'Big Four' supermarket operators (Asda, Morrisons, Tesco and Sainsbury's), which have traditionally dominated the market, were building and operating increasingly larger stores and expanding the range of services that they provide (particularly in terms of comparison retail goods). Whilst many of these larger stores were built

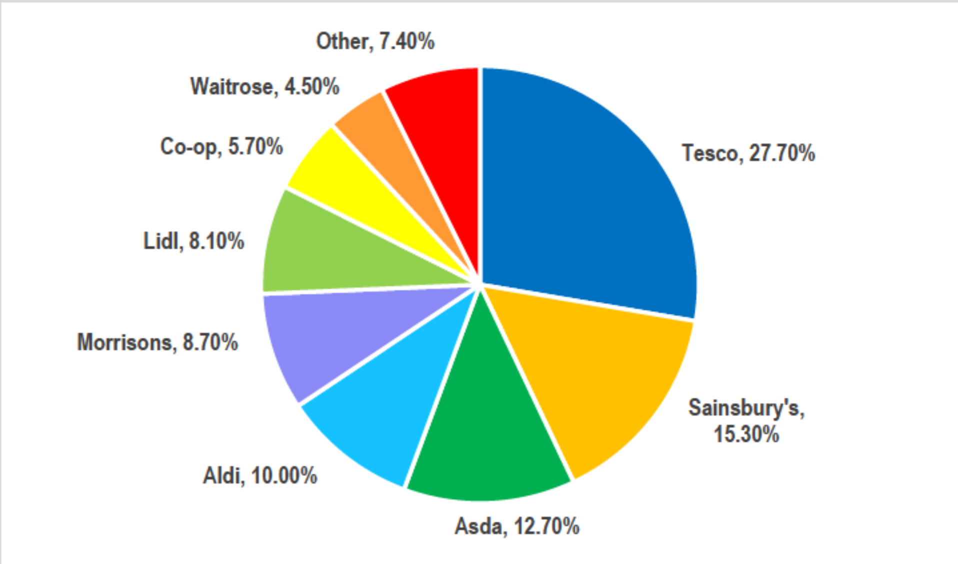
[13] Carter Jonas, Commercial Market Outlook. Available online at: https://www.carterjonas.co.uk/commercial-market-outlook#:~:text=Average%20rents%20for%20standard%20(high,per%20annum%20the%20previous%20month. Figures taken from MSCI's Monthly Index.

outside of town centres, new large foodstores also often served to anchor re-development schemes within smaller town centres.

3.2.2 Following the global financial crisis, the market dominance of the traditional 'Big Four' has been increasingly challenged, both by higher-end operators, such as Waitrose and Marks & Spencer (Simply Food and Foodhall formats), and retailers which previously focused on the value/discount end of the market, such as Aldi and Lidl, which have achieved significant year-on-year growth over recent years as they have emerged as important forces in the convenience goods retail sector. Expenditure on convenience retail goods had been falling in recent years due to increasing competition between operators (leading to a reduction in prices and low inflation).

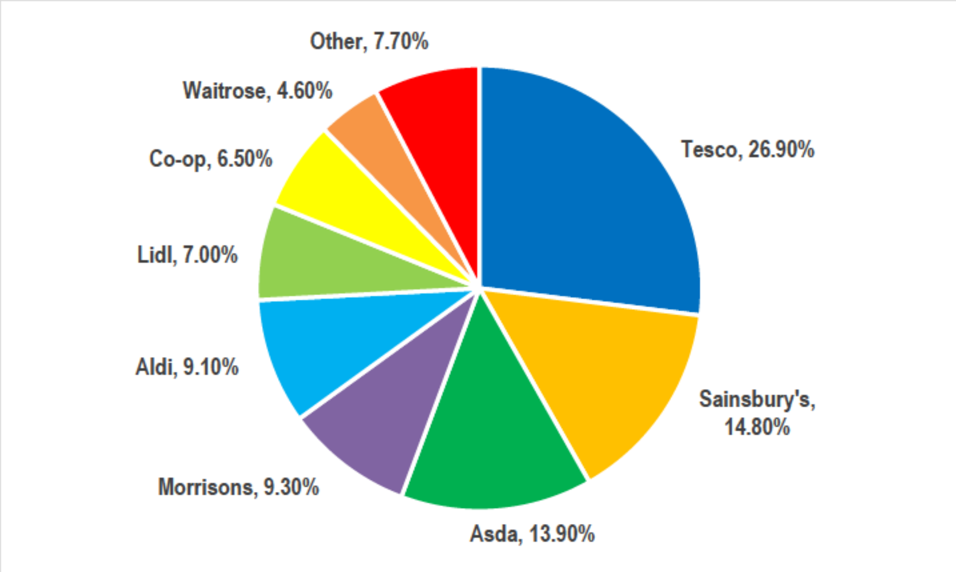
3.2.3 Figures 3-2 and 3-3 show the UK grocery market share as of August 2024 and August 2022, respectively. Aldi now has a greater proportion of the UK grocery market share than Morrisons – Aldi's market share increasing by 0.9 percentage points over that 24-month period alone, with Morrisons going in the opposite direction – and therefore the 'Big Four' is now an outdated concept. Aldi and the traditional 'Big Four' supermarket operators account for approximately three quarters of the convenience retail market.

Figure 3-2: UK Grocery Market Share (August 2024)



Source: KANTAR

Figure 3-3: UK Grocery Market Share (August 2022)



Source: KANTAR

3.2.4 There has been an increasing move by the major convenience goods retail operators away from opening larger-format stores, towards smaller supermarkets and establishing a network of ‘top up’ convenience goods shopping facilities. These smaller-format stores are often located in town centres, or district/neighbourhood shopping parades. The shift has been driven by changing consumer behaviour; shoppers are undertaking an increasing number of smaller ‘top-up shopping’ or ‘basket shopping’ trips instead of a weekly food shop at a large out-of-centre foodstore.

3.2.5 One of the reasons which explains why retailers such as Aldi and Lidl have increased their market share over recent years is because they have successfully diversified their offers to include more premium products, thereby appealing to new categories of customers. Those retailers are no longer really ‘discount operators’ in the way they were 10 or more years ago, and they have effectively become mainstream foodstore operators.

3.2.6 Both Sainsbury’s and Tesco now have more convenience stores than large supermarkets and superstores, and they have withdrawn proposals for new superstores and from town centre redevelopment projects in recent years. In the last few years both Tesco and Morrisons have closed dozens of ‘unprofitable’ foodstores (with Morrisons also disposing of its portfolio of convenience stores to concentrate on its core business, demonstrating the complexity of changes within the market).

3.2.7 By way of comparison, Aldi has been on a rapid expansion drive in recent years. The retailer currently has more than 1,020 stores and is continuing to work towards its long-term target of more than 1,500 stores across the UK. The operator is also seeking to expand its Aldi Local store format inside the M25, further demonstrating its success[14].

3.2.8 In its aim to become the UK’s leading omnichannel retailer, Marks & Spencer announced a £480 million investment in its store rotation programme in January 2023[15]. The retailer opened around 20 new, bigger and better stores during the 2023/24 financial year, helping to fulfil its aim of creating a store estate fit for the future. The store rotation programme seeks to ensure the right stores in the right places, with the right space, and the company aims to evolve from the 247 stores it has today to 180 higher quality, higher productivity full line stores selling

[14] Aldi, Business News: Aldi shares update on new store locations wish list. 26 June 2024. Available online: https://www.aldipresscentre.co.uk/business-news/aldi-shares-update-on-new-store-locations-wish-list/

[15] M&S Sets Out C.£500m Investment in its Store Rotation Programme That Will Create Over 3400 Jobs Nationwide | Marks & Spencer (marksandspencer.com)

clothing, homewares and food whilst also opening over 100 bigger and better foodstores by 2027/28.

3.3 Comparison Retail Sector

3.3.1 Over the last few years there have been many notable failures and company restructurings within the comparison goods retail sector, including Dawsons Music, T M Lewin, Victoria's Secret, Jessops, Paperchase, Debenhams, Edinburgh Woollen Mill, Arcadia and, most recently, Ted Baker. Furthermore, the impacts of COVID-19 have led to some major operators not returning to the high street, such as Topshop. It is not just operators with physical store formats that have suffered the impacts of COVID-19, however. Missguided, the e-commerce fashion group, went into administration in May 2022. The company was particularly successful during the pandemic, when lockdown measures forced many clothing stores to temporarily close, but sales were affected upon the reopening of stores[16].

3.3.2 Whilst the circumstances impacting each of the retailers are specific to them, a couple of common themes have led to companies failing or needing to restructure, including:

- **Relevance** – the format of certain retailers is becoming less relevant, a good example of this being Toys R Us. Due to the size of the stores, Toys R Us found itself competing against larger retailers such as foodstores and the likes of Argos. As Toys R Us was a specialist retailer, it was unable to change the type of goods being sold within its stores (in the way that foodstores and catalogue retailers can) and therefore Toys R Us could not react to the market change as freely. Toys R Us also had to compete against large online retailers, such as Amazon, which can offer goods at cheaper prices due to lower overheads.

- **Over-expansion** – some retailers over-expanded in the early 2000s and have not been able to respond to the growth in online retailing and decline in high street retailing. A good example of this is Maplin, which experienced rapid growth but found that its specialist product was more tailored to an online audience.

3.3.3 Whilst it is a common view that the prevalence of online retailing will continue to increase, it would be naïve to dismiss the role of the high street and multi-channel retailing. Often, the most successful online brands are built from their reputation on the high street (a good example being John Lewis).

3.4 Commercial Leisure

3.4.1 Following the global financial crisis, the restaurant sector felt the effects of the 'casual dining crunch' due to an over-saturation of the market and increased competition as well as increasing food costs, staff costs, rents and business rates. Moreover, despite customers spending more when they dine, they are eating out less often[17].

3.4.2 Restaurants closed at their highest rate in a decade in the first three months of 2023[18], which was the result of staff shortages and the cost-of-living crisis, which forced households to rein in their spending. The trend of closures follows a number of restaurant chains, including Byron, Gourmet Burger Kitchen, Strada and Carluccio's, being forced to close dozens of restaurants in the peak of the pandemic as they could not withstand the various lockdowns and other COVID-related restrictions. One commentator noted that those restaurants that were kept afloat during the pandemic due to government support schemes are now faced with

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[16] Who's Gone Bust in Retail? The Centre For Retail Research

[17] The Guardian, The casual dining crunch: why are Jamie's Italian, Strada, Byron (and the rest) all struggling? 22 February 2022. Available online at: The casual dining crunch: why are Jamie's Italian, Strada, Byron (and the rest) all struggling? | Restaurants | The Guardian

[18] The Caterer, Restaurant closures hit ten-year high, 6 July 2023. Available online at: Restaurant closures hit ten-year high – The Caterer

rising inflation, a post-Brexit labour shortage and consumers who have less spending power[19]. We envisage that there will be further restaurant closures, particularly amongst large chains.

3.4.3 The intermittent closure of the casual dining sector during the COVID-19 pandemic is partly responsible for the boost in fast-food takeaways, which is now the fastest growing category nationally. Many fast-food takeaways have expanded their estate to cater for increased demand and to take advantage of favourable trading conditions.

3.4.4 Many consider spending on leisure to be discretionary and therefore it is likely to be in line with the performance of the UK economy. Table 3-2 shows average weekly household spending on leisure between 2009 and 2023. It is worth noting that the 2009 data coincided with the aftermath of the global financial crisis, 2014 was prior to the Brexit vote, data from the financial year ending 2020 relate to the period immediately prior to the COVID-19 pandemic and data from the financial year ending 2023 are the latest available figures.

Table 3-2: Average Weekly Household Spending Data 2009-2023

Spending Category	2009 (£)	2014 (£)	2020 (£)	2023 (£)	% change (2009-2020)	% change (2009-2023)	% change (2020-2023)
Cinema, theatre and museums etc.	2.30	2.80	3.30	2.90	43.5	26.1	-12.1
Admissions to clubs, dances, disco and bingo	0.50	0.50	0.80	0.60	60	20	-25
Restaurant and café meals	13.30	16.60	20.20	14.00	51.9	5.3	-30.7
Takeaway meals and other snack food	8.00	8.80	10.90	7.10	36.3	-11.3	-34.9
Gambling payments	4.10	2.90	2.40	1.20	-41.5	-70.7	-50
Sports admission, subscriptions, leisure class fees and equipment hire	5.00	6.90	7.80	5.90	56	18	-24.4

Source: ONS, Family Workbook Spending in the UK, March 2021 and August 2024

3.4.5 Between 2009 and 2020, the average weekly household spend increased across all of the sub-categories with the exception of gambling payments. There was a significant growth in spending on sports admission subscriptions and leisure class fees, largely led by a doubling of spending on subscriptions to sports and social clubs, which reflects the growth in the discount gym market.

3.4.6 There was also a significant increase (51.9 per cent) in spending on restaurant and café meals since the start of the global financial crisis. The decrease in gambling payments (-41.5 per cent) was largely led by a significant fall in spending at bookmakers. Online gambling, however, has become much more prevalent in recent years. In 2020, almost one in four adults gambled during the last month compared to around one in six five years prior[20].

[19] Data from UHY Hacker Young sourced in The Guardian, UK restaurant insolvencies jump by more than 60 per cent in year, data shows, July 2022. Available online at: UK restaurant insolvencies jump by more than 60% in year, data shows | Hospitality industry | The Guardian

[20] Taking a more in-depth look at online gambling – Gambling Commission

3.4.7 When compared with the data for 2020, the data for 2023 show a vastly significant reduction in average weekly household spending across all of the sub-categories, perhaps due to the cost-of-living crisis which led households to rein in their spending. The change in the average weekly household spending on sports admissions, takeaways and restaurants was less marked when compared to the other spending categories, demonstrating which leisure activities households would rather spend their money on during difficult financial times.

3.5 Impacts of COVID-19

3.5.1 The retail property market was already challenging before the onset of the COVID-19 pandemic, with an increasing volume of activity shifting to online shopping. With three national lockdowns, local lockdown rules and some form of restrictions on economic life for almost two years, the short-term impacts of the global pandemic on retail have been stark. In 2020, total retail sales volumes fell by 1.9 per cent in Great Britain compared with 2019, the largest annual fall on record[21]. A number of national multiple retailers were forced to restructure or enter administration, including Clarks, Debenhams, Oasis, Warehouse, Cath Kidston and Brighthouse. In contrast, independent retailers performed better during the pandemic with 804 units opening in the first half of 2021[22]. This growth can be attributed in part to government support measures, business rates relief and the moratorium on evictions for commercial tenants, all of which enabled them to remain operational.

3.6 Potential Economic Scenarios

3.6.1 As well as outlining 'the central case' for the UK's long-term macro-economic performance, Experian puts forward three alternative scenarios, namely 'severe case', 'higher case' and 'very severe case'[23].

3.6.2 The central case assumes that the conflict in Ukraine will continue but that no further sanctions on or from Russia are introduced. Experian also assumes that the conflict in the Middle East will continue but that it will not escalate further, nor will there be wider geopolitical breakdown. Experian's central case also assumes that the crisis in the Red Sea does not deteriorate further, that the global oil price would be between $70 and $90 per barrel in Q4 2023 and that the Consumer Price Index ('CPI') would ease to 2.2 per cent by the end of 2023 The central case assumes that there will be no further increases to the Bank Rate, and a mild return to growth during 2024 given easing inflation and strengthening business and consumer confidence. A 40 per cent probability is attached to the central case, albeit Experian identifies a number of risks relating to this scenario, including:

- One or more major oil producing countries cut oil supply as a political reaction to the Russia-Ukraine conflict, which would impact inflation. A wider conflict could also disrupt global supply chains.
- Uncertainty surrounding the outcome of the 2024 UK General Election.
- Consumers may choose to save more if they become more concerned about job security as a result of rising unemployment which would drive down demand.
- The long-term economic consequences of Brexit will be dependent on the UK-EU's relationship going forward. The impact on external trade, foreign direct investment and migration are of considerable importance as they can directly affect labour supply and productivity. Experian notes that there are clear trade-offs between market access and

[21] ONS, Impact of the coronavirus (COVID-19) pandemic on retail sales in 2020, February 2021

[22] Local Data Company, Looking Beyond Lockdown: GB Retail and Leisure Market Analysis H1 2021, September 2021

[23] Experian, Retail Planner Briefing Note 21, February 2024

control over EU migration; however, businesses could struggle to adapt in accepting less favourable terms of trade and the associated costs (tariff and non-tariff).

3.6.3 In addition to the central case, Experian presents one upside (‘higher case’) and two downside scenarios (‘severe case’ and ‘very severe case’). The alternative scenarios assess the different ways in which the Russia-Ukraine and Middle East conflicts could play out (and whether any further sanctions are imposed), the level of disruption arising from the Red Sea Crisis and the associated impacts on the global and UK economies. All of the scenarios assume that there will be no further COVID-19 restrictions and that the Energy Price Guarantee (‘EPG’) will cease to exist from April 2024.

3.6.4 A 30 per cent probability is attached to the more optimistic ‘higher case’, in which it is assumed that the Russia-Ukraine and Middle East conflicts begin to subside, and sanctions are gradually lifted. In terms of the Red Sea Crisis, the disruption eases and trade traffic returns to normal leading to a reduced risk to oil prices and global supply chains. Russian oil and gas exports to Europe rise and prices slowly decrease with the global oil price dropping to between $50 and $70 a barrel. The higher case assumed that the Bank Rate would begin to drop back from 2024Q1. This in turn has a positive effect on business confidence and ultimately job hiring and the unemployment rate. The milder outlook for inflation means that real household disposable income grows in line with the pre-pandemic rate through 2024, aided by an inflation linked uplift to benefits and pensions. The higher case assumes that GDP grows by 1.3 per cent in 2024, increasing to 2.7 per cent in 2025. In all the scenarios including the higher case, Experian has assumed that Brexit has a mild downward impact on trade.

3.6.5 A 25 per cent probability is attached to the ‘severe case’ in which it is assumed that there is no foreseeable end to the Russia-Ukraine conflict, Western sanctions on Russia continue and become more severe, and Russia then cuts off gas supply to all of Europe. The severe case also assumes that the Middle East conflict and the Red Sea Crisis continue and result in additional disruption to global supply chains relative to the central case. As such, the global oil price rises to between $90 and $120 a barrel on a quarterly average basis under the severe case, inflation rises sharply and domestic energy costs immediately increase when the EPG expires in April 2024. In response to persistent high inflation, the Bank Rate peaks at 6.75 per cent in 2024. On an annual basis the economy shrinks by roughly 1 per cent in 2024 and 0.5 per cent in 2025 before beginning to recover in 2026 as inflation eases back towards target.

3.6.6 A 5 per cent probability is attached to the ‘very severe case’. As with the central and severe cases, the very severe case assumes that the Russia-Ukraine conflict continues indefinitely. However, unlike the other scenarios, the very severe case assumes that, as well as gas, Russia cuts off oil supply to all of Europe. This scenario also assumes that several major oil producing countries cut oil supply as a political reaction to the conflict in the Middle East, and that global supply chains are further disrupted by a major reduction in traffic passing through the Red Sea, increasing operating costs and delivery times. Both gas and oil prices rise, with the latter peaking at more than $130 a barrel. Domestic energy prices spike following the expiration of the EPG in April 2024, and CPI inflation remains above the Bank of England’s 2 per cent target until 2026 Q4. The unemployment rate is assumed to rise to 7.8 per cent in early 2025, remaining above 7 per cent until 2027 Q1. This scenario assumes that the Bank Rate rises to 8.5 per cent in 2024. The cost-of-living crisis underpins a gradual decline in consumer spending, which lasts until 2025 Q3, and the very severe case assumes that GDP declines at an average rate of 2.6 per cent between 2024 and 2025.

4 Performance Analyses

4.1 Introduction

4.1.1 We have undertaken performance analyses (otherwise known as 'health checks') of the three main town centres (Grimsby, Cleethorpes and Immingham), and Freeman Street District Centre. Our appraisals were informed by visits to the centres on 15 May 2024, together with desk-based research which draws on published information from national data-providers.

4.1.2 For the performance analyses, we describe the position in relation to key indicators of vitality and viability that are set out within the Planning Practice Guidance ('PPG'), summarised below in Table 4-1, but information for some of the indicators is not readily available (or useful) for certain centres. For instance, we do not provide an analysis of crime statistics as the boundaries that are used to report on the level of crime are different to the defined town and district centre boundaries and, in the absence of formal footfall surveys for the centres, we necessarily comment on pedestrian flows at a high level. Where relevant, we compare our findings with those from the Council's previous retail and leisure study[24] in order to track changes in the performance of the centres over the past 11 years.

Table 4-1: PPG Town Centre Vitality and Viability Indicators

Vitality and viability of town centres: key indicators
Diversity of uses
Proportion of vacant street level property
Commercial yields on non-domestic property
Customers' experience and behaviour
Retailer representation and intentions to change representation
Commercial rents
Pedestrian flows
Accessibility – encompassing transport accessibility and accessibility for people with impairments or health conditions, as well as people with mobility requirements
Perceptions of safety and occurrence of crime
State of town centre environmental quality
Balance between independent and multiple stores
Extent to which there is evidence of barriers to new businesses opening and existing businesses expanding
Opening hours / availability / extent to which there is an evening and night-time economy offer

[24] North East Lincolnshire Retail, Leisure and Three Centres Study (2013)

4.1.3 As well as providing the base position for the future monitoring of town centre vitality and viability, the performance analysis exercise identifies the key strengths of the centres as well as deficiencies and areas that would benefit from improvement. We then use this information to inform our recommendations in subsequent sections of our report.

4.1.4 For Grimsby Town Centre, Cleethorpes Town Centre and Freeman Street District Centre, the diversity of uses audits are based on Experian Goad plans, updated by Stantec in May 2024. A Goad plan does not exist for Immingham Town Centre and so we recorded all of the uses within the centre during our visit. We assigned the units within Immingham an Experian Goad code so that it could be analysed in the same way as the other centres. Floorspace data were not available for Immingham and so our diversity of uses audit focuses on the number and mix of units only.

4.1.5 It is worth highlighting that some town centre uses such as public houses, bars, nightclubs, cinemas, theatres, solicitors, betting offices and dentists are not listed within Experian's Centre Report and are therefore excluded from the diversity of uses analyses. This results in a difference between the actual number of units within a defined centre and the number of units reported within the diversity of uses analysis (as well as within the individual retail categories). Where relevant, however, we have referred to these common town centre uses within our qualitative appraisal of the centres. Furthermore, Experian Goad only records uses within ground floor units, except for shopping centres, where the uses on each floor are recorded. For example, an entrance to a first-floor restaurant would not be assigned a Goad code.

4.1.6 The Goad definition of Grimsby Town Centre is somewhat different vis-à-vis the adopted town centre boundary. Whilst both areas include the main part of Grimsby Town Centre that is physically constrained by the residential area to the west, the railway line to the south and the A16 to the east, the Goad definition extends southwards along Wellowgate and includes only several units beyond the A1136 (Frederick Ward Way) in the north. In contrast, the adopted town centre boundary extends further northwards, beyond the A1136, towards the docks.

Figure 4-1: Adopted town centre boundary (left, shown in light blue) and Experian's Goad survey area (right)

Source: North East Lincolnshire Local Plan 2013 to 2032 Town Centre Inset Maps (left) and Experian Goad (right)

4.1.7 The Goad definition of Cleethorpes Town Centre differs substantially from the town centre boundary identified on the adopted Town Centre Inset Map. The latter includes 'Sea View Street', which was a defined local centre in the previously adopted local plan but has since been subsumed within the defined boundary for Cleethorpes Town Centre (see paragraph

4.3.4 for more details). In other words, the Goad survey area for Cleethorpes Town Centre is much smaller than the defined town centre boundary.

Figure 4-2: Adopted town centre boundary (left, shown in light blue) and Experian's Goad town centre boundary (right)

Source: North East Lincolnshire Local Plan 2013 to 2032 Town Centre Inset Maps (left) and Experian Goad (right)

4.1.8 Similarly, the Goad definition of Freeman Street District Centre is quite different to the Local Plan's defined district centre boundary. The former includes a c.1km stretch of Freeman Street, from its junction with Cleethorpe Road in the north to Pasture Street in the south. In the north, the Goad survey area extends eastwards along Cleethorpe Road, which is in fact a separate defined centre, namely 'Cleethorpe Road Local Centre'. The Local Plan's defined district centre boundary covers a shorter stretch of Freeman Street, from its junction with Church Street in the north to its junction with Ellis Way and Eleanor Street in the south, and does not include Cleethorpe Road Local Centre. Both the Goad survey area and the defined district centre boundary include the Asda superstore to the west of Freeman Street.

Figure 4-3: Defined district centre boundary (left, shown in light blue) and Experian's Goad survey area (right)

Source: North East Lincolnshire Local Plan 2013 to 2032 (left) and Experian Goad (right)

4.2 Performance of Grimsby Town Centre

4.2.1 Grimsby Town Centre is identified as a sub-regional centre within Policy 23 ('Retail hierarchy and town centre development') of the adopted Local Plan and it therefore sits at the top of the Borough's retail hierarchy.

4.2.2 The majority of retail activity within Grimsby Town Centre can be found in the area that is physically constrained by Frederick Ward Way to the north and west, the railway line to the south and the A16 to the east.

Previous Findings

4.2.3 The Retail, Leisure and Three Centres Study (2013) found that the town centre's retail offer had developed in two distinct areas; Top Town (the main shopping area around Victoria Street and Freshney Place Shopping Centre) and Freeman Street (historically the main thoroughfare linking Top Town to the docks). The majority of national multiple retailers could be found in Top Town whilst the main retail offer in Freeman Street was predominantly small-scale and top-up orientated, aside from the Asda superstore. The retail role of Freeman Street has significantly declined over the years.

4.2.4 The qualitative assessment revealed that Top Town continues to be vital and viable and, whilst there had been a decrease in comparison retail provision and an associated increase in vacancies, these changes primarily reflected the ongoing economic/trading climate rather than any significant deficiencies in the town centre offer. The quantitative assessment revealed, however, that its market share for 'high street' comparison goods (particularly clothing, which is a key driver of shoppers' choice of destination) had been significantly eroded since an earlier study in 2005. The 2013 Study identified that Top Town still retained c.75 per cent of the key 'high street' comparison goods expenditure from its immediate catchment, but this positive performance was said to reflect the fact that Grimsby faces limited competition from other centres within the study area and serves an isolated catchment rather than it having a particularly strong retail offer of its own accord. Several deficiencies were found regarding the Grimsby's comparison retail offer:

- *'The town centre lacks some of the mid-to-higher range fashion retailers normally associated with sub-regional centres; this may in part be attributable to a lack of suitable available retail accommodation in the town centre beyond Freshney Place.*
- *Whilst there are department stores located within the town centre (House of Fraser and Marks & Spencer in particular), there are other prominent multiple retailers not currently represented; any addition to the department store offer would therefore deliver significant qualitative benefits in terms of enhancing the attraction of the town centre in the wider sub-region.*
- *There is a stated desire by local residents for an enhanced range of multiple shops in Grimsby town centre.'*

4.2.5 The previous study noted that the relative isolation of the town presented opportunities to further enhance the town centre retail and leisure offer going forward, including:

- *'There is a significant local resident ('latent') population in the borough which view Grimsby as the primary shopping destination; both Immingham and Cleethorpes are smaller localised centres which serve daily shopping needs.*
- *There is a large transient tourist population and associated spending which the town centre attracts from day visitors.*
- *The ongoing trend of mainstream national multiple retailers consolidating their portfolio / representation towards larger towns whereby they can service the needs of a larger*

catchment from one large store rather than a series of smaller stores in surrounding (smaller) centres. Grimsby is very much the sub-regional centre for North East Lincolnshire (and beyond).'

4.2.6 The leisure offer within the town as a whole (that is, Top Town and Freeman Street) was fairly limited, with no cinema or similar large-scale family-orientated entertainment venue. There was thought to be a significant opportunity to create a new leisure quarter in the town centre anchored by a new multiplex cinema.

4.2.7 In terms of Freeman Street, the 2013 Study reported that, given the high level of unit vacancy, it was important for the shopping area to be physically consolidated into a viable entity, to encourage linked shopping trips with the Asda superstore. The report went on to say that the focus should be on consolidation and improvement works rather than planning for quantitative-based expansion, and that the relocation of businesses to the southern section of Freeman Street may also assist in creating the critical mass to sustain and attract investment and encourage viable shopping patterns.

Diversity of Uses

4.2.8 Grimsby Town Centre contains a total of 323 retail/service units, with a combined floorspace of 77,370 sq.m gross. The diversity of uses present within the town centre in terms of the number and proportion of units and floorspace is set out in Table 4-2, compared with the Goad UK average for all of the c.1,950 centres and shopping locations covered by Experian[25]. The full breakdown of uses can be found within Appendix A of the separate Appendices Volume[26]. For all the centres for which we have completed performance analyses, the reader must take care when comparing the centre's diversity of uses to the UK average for all centres, which does not necessarily represent a like-for-like comparison given that it is an average spanning the largest city centres through to much smaller centres. Where possible, we make comparisons between this study and the last.

[25] Hereafter referred to as 'the UK average for all centres'.

[26] The full breakdown of uses for Cleethorpes, Immingham and Freeman District can also be found in Appendix A.

Table 4-2: Diversity of Uses, Grimsby Town Centre (May 2024)

Grimsby Town Centre – Diversity of Uses						
Category	**No. of units**	**% of total units**	**UK (%)**	**Floorspace (sq.m)**	**Floorspace (%)**	**UK (%)**
Retail Services[27]	36	11.2	14.9	3,220	4.2	7.5
Leisure Services[28]	36	11.2	19.0	5,560	7.2	13.7
Comparison	98	30.3	33.4	28,610	37.0	37.8
Convenience	17	5.3	10.2	8,110	10.5	19.0
Financial and Business[29]	28	8.7	6.0	5,090	6.6	4.8
Miscellaneous[30]	7	2.2	1.0	1,270	1.6	0.7
Vacant[31]	101	31.3	15.5	25,510	33.0	16.5
Total	**323**	**100**	**100**	**77,370**	**100**	**100**

Source: Stantec update of Experian Goad plan (Experian Goad for UK averages, May 2024). Some of the percentage totals might not sum exactly to 100 per cent due to rounding.

4.2.9 The proportion of retail services recorded in Grimsby Town Centre (11.2 per cent) is below the UK average for all centres (14.9 per cent). Similarly, retail services account for 4.2 per cent of floorspace in the town centre, which is lower than the UK average for all centres (7.5 per cent).

4.2.10 Leisure services account for 11.2 per cent of town centre units and 7.2 per cent of total floorspace, in both cases significantly below the UK average for all centres. This is a significant weakness of Grimsby Town Centre, especially considering it is the principal centre in North East Lincolnshire and would therefore be expected to have a strong leisure offer to serve the wider catchment. The previous study reported that 'Food & Drink (A3-A5)' uses accounted for 14.1 per cent of the total units in Grimsby Town Centre. As such, there has been a reduction in the proportion of leisure services in the period since the previous study. It should be noted, however, that the diversity of uses analysis excludes certain leisure services. Grimsby Town Centre in fact also contains public houses, bars, a nightclub, betting offices and hotels.

4.2.11 Comparison retail units account for 30.3 per cent of town centre units, and 37.0 per cent of the town centre's total floorspace is recorded as comparison retail floorspace, in both cases slightly below the UK average for all centres. The strongest comparison goods sub-sectors are *'mixed and general clothing'*, *'chemists, toiletries and opticians'*, *'jewellers, clocks & repair'* and *'women's, girls' and children's clothing'*. Compared to the UK average for all centres, the proportions of businesses falling within the *'charity shops, pets and other comparison'*, *'furniture, carpets & textiles'*, *'booksellers, arts/crafts, stationers/copy bureaux'* and *'gifts,*

[27] Retail services comprise hairdressers, beauty parlours and health centres (Experian Goad code G3B), laundries and drycleaners (G3C) and travel agents (G3D).

[28] Leisure services comprise restaurants, cafés, coffee bars, fast food and takeaways (Experian Goad code G3A). As mentioned earlier in our report, numerous town centre uses are excluded from the Experian Goad based diversity of uses analysis, such as a number of leisure services including bars and wine bars; bingo and amusements; casinos and betting offices; cinemas, theatres and concert halls; clubs; disco, dance and nightclubs; hotels and guest houses; and public houses. As such, the proportion of leisure services within each of the study centres is higher than that recorded in the Diversity of Uses tables. However, we include qualitative descriptions of the excluded leisure services elsewhere in the health checks to ensure they are not overlooked.

[29] Financial and business services comprise banks and financial services (Experian Goad code G3E), building societies (G3F) and estate agents and auctioneers (G3G).

[30] Miscellaneous uses include employment, careers, Post Offices and information (Experian Goad code G4A).

[31] This includes all vacant retail / service units plus those under alteration (Experian Goad code G4B).

china, glass and leather goods' sub-sectors are low. The proportion of comparison retail units recorded at the time of the previous study was 33.8 per cent. The reduction in the proportion of comparison retail units vis-à-vis the previous study is partly due to the Freshney Place market hall and leisure development coming to fruition. Initial construction works have begun to transform the western end of Freshney Place Shopping Centre into a new market hall, cinema and other leisure facilities. The majority of the retail units at the western end of the shopping centre lie vacant ahead of the scheme being implemented in full.

4.2.12 Convenience goods retail provision is significantly below the UK average for all centres in terms of the proportion of total units and the proportion of total floorspace. Just 5.3 per cent of Grimsby Town Centre's retail and service units are in convenience retail use (compared to the national average of 10.2 per cent). Similarly, the proportion of convenience retail floorspace is just over half the UK average for all centres (10.5 per cent versus 19 per cent). The main convenience retail provision within the town centre is Grimsby Top Town Market[32] (4,260 sq.m), Marks & Spencer Foodhall (1,790 sq.m) and Iceland (640 sq.m). There is significant out-of-centre convenience retail provision to the north of Grimsby Town Centre, including large Sainsbury's and Tesco Extra stores.

4.2.13 The proportion of financial and business services is slightly above the UK average for all centres, both in terms of the number of units and floorspace. Grimsby Town Centre has 15 *'banks & financial services*', one *'building society'* and 12 *'estate agents & auctioneers'.*

4.2.14 Grimsby Town Centre has 7 units which fall within the miscellaneous sub-sector '*employment, careers, Post Offices & information*', which equates to a representation slightly above the UK average for all centres, both in terms of the number of units and floorspace.

4.2.15 There were 101 vacant units within Grimsby Town Centre in May 2024, equating to a vacancy rate more than double the UK average for all centres both in relation to the proportion of units and floorspace. We explore that key indicator in greater detail, below.

Proportion of Vacant Property

4.2.16 The proportion of vacant units across the town centre (31.3 per cent) is double the UK average for all centres (15.5 per cent), as is the proportion of vacant floorspace (33.0 per cent versus 16.5 per cent). The quantum of vacant floorspace recorded in May 2024 (25,510 sq.m) is almost three times that recorded at the time of the previous study (8,770 sq.m).

4.2.17 The number of vacant units recorded in May 2024 has been skewed by the high number of vacant units within Freshney Place, particularly in the western section of the shopping centre. As mentioned above, work has now begun to create a new cinema, leisure and entertainment space in the heart of Grimsby Town Centre[33]. Parkway Entertainment Ltd, a regional cinema operator, has already announced its plans for a five-screen complex. To make way for these plans, Flottergate Mall has been emptied alongside those units just outside the shopping centre in the Bull Ring area. In addition to the leisure complex, Grimsby's Top Town Market will be rehoused in the former BHS unit and complete with a fresh new look to create a modern venue for people to shop and enjoy. Furthermore, a new Community Diagnostics Centre will open in Freshney Place near Friary Walk and Baxtergate Square.

[32] Grimsby Top Town Market predominantly sells local produce; however, it also sells non-food goods including clothing and shoes, gifts and homeware. Markets are assigned the Experian Goad code G1C (which includes greengocers, fishmongers and markets*)* irrespective of what they sell. Whilst we acknowledge that not all of the floorspace in Grimsby Top Town Market is used for the sale of convenience retail goods, each retail/service unit can only be assigned one Goad code and, rather than trying to determine the proportion of floorspace that is occupied by each retail sub-category (especially since the market was closed on the day of our site visit), we have kept the original Goad code for markets.

[33] Freshney Place - Market Hall and Leisure Development. Available online at: https://freshneyplace.co.uk/markethallandleisuredevelopment/

Figure 4-4: Vacant units which will be repurposed as part of the Freshney Place redevelopment

Source: Stantec

4.2.18 Excluding those vacant units which will be redeveloped – to make way for the new cinema, leisure and entertainment complex as well as the new Community Diagnostics Centre – would have a beneficial effect on the town centre's vacancy rate. Given the exceptionally high level of unit vacancy and quantum of vacant floorspace within Grimsby Town Centre, however, the vacancy rate is still significantly above the UK average for all centres even after completing this exercise. Furthermore, with reference to paragraph 4.1.5 and footnote 32, the diversity of uses analysis only takes into account vacant retail and service units (including those under alteration) and not, for example, vacant public houses, offices and other buildings. As such, there is more vacant property within the town centre than the diversity of uses analysis suggests. For example, the only vacant units at Riverhead included within the diversity of uses analysis are Units 2-3, whereas Units 1-6 are in fact vacant (but they include vacant indoor play and public houses).

4.2.19 Aside from the vacant units in and around Freshney Place, there are large vacant units at 64 Victoria Street West, between 11-13 and 17-19 Osbourne Street, 6 Bull Ring Lane and 17-19

Abbey Road. There are also concentrations of smaller vacant units along Wellowgate, Bethlehem Street, Victoria Street South/West and Regent Arcade.

Figure 4-5: Vacant units, Units 1-6 Riverhead

Source: Stantec

Retailer Representation

4.2.20 Freshney Place Shopping Centre is occupied by a number of national multiple retailers including Bonmarché, Boots Chemist, Card Factory, Deichmann, HMV, JD Sports, New Look, Next, Poundland, Primark, River Island, Superdrug, The Entertainer and Waterstones. It is evident from the range of national multiple retailers present that Grimsby has a mid-range fashion offer with a noticeable lack of high-end retailers, aside from a small number at Abbeygate (covered further, below).

4.2.21 Convenience retail operators include bakers and confectioners (Cooplands, Greggs and Millie’s Cookies), frozen food (Iceland), CTN & convenience (such as Cigarette Outlet, Go Local and Wellowgate Stores) and a supermarket (Marks & Spencer Foodhall).

4.2.22 Grimsby Top Town Market is located to the west of Freshney Place and operates every Tuesday, Thursday, Friday and Saturday between the hours of 09.00 and 16.00. The market predominantly sells local produce; however, it also sells non-food goods including clothing and shoes, gifts, electrical goods and homeware. The market will remain open until the new market hall is complete.

Balance between Independent Retailers and National Multiples

4.2.23 Grimsby Town Centre includes a mix of national multiple retailers and independent retailers. The vast majority of national multiple retailers can be found in the Freshney Place Shopping Centre and along Victoria Street. Independent retailers tend to be found outside of the primary shopping frontage and on the outskirts of the town centre. Abbeygate is a small shopping centre (parade) in the southern part of the town centre which exclusively contains independent retailers.

Accessibility and Pedestrian Flows

4.2.24 Grimsby Town Centre is accessible by car given that the A16 forms the eastern boundary of the centre. The A16 is a principal road in Lincolnshire, which connects the port of Grimsby in the north to Peterborough (Cambridgeshire) in the south. Driving within the centre is quite difficult, however, given that George Street, Victoria Street and New Street are 24-hour, seven-days-a-week Restricted Parking Zones meaning that, except for buses, taxis or blue badge holders, traffic is banned from entering and/or stopping, or loading/unloading. A number of surface and multi-storey car parks are located near to the main shopping area.

4.2.25 Grimsby Riverhead Exchange is a series of bus stops located along George Street, Victoria Street West, Town Hall Street and Town Hall Square, which consists of 11 stands (Stands A-L[34]) providing services to Barton-upon-Humber, Bradley, Cleethorpes Pier, Immingham, Louth, Market Rasen, Old Clee, Waltham and Wybers Wood. There are proposals to build a new bus station in Grimsby Town Centre, with a 1.6-acre site along Osbourne Street flagged as a potential location for the new station.

4.2.26 Grimsby Town Railway Station is located in the southern part of the town centre. The station is on the South Humberside Main Line, which runs between Doncaster and Cleethorpes. TransPennine Express operates an hourly service between Cleethorpes and Liverpool Lime Street, which calls at Grimsby Town. East Midlands Railway operates two services which call at Grimsby Town, a service between Grimsby Town and Leicester and a service between Cleethorpes and Barton-upon-Humber (both of which operate every two hours). Northern Trains operates a single train per day between Cleethorpes and Sheffield, calling at Grimsby Town once in the morning en route to Cleethorpes and once in the afternoon en route to Sheffield. As such, Grimsby Town Centre is accessible via train.

4.2.27 Pedestrian access to the town centre from the residential areas to the north west, west and south could be improved, with Frederick Ward Way and the railway line acting as physical barriers (albeit there are level crossings at Wellowgate and Garden Street). Pedestrian movement within the town centre is good, with all of the primary shopping frontage being pedestrianised.

Perception of Safety and Occurrence of Crime

4.2.28 The town centre felt safe during our visit in May 2024. The visible security presence within Freshney Place Shopping Centre limits the scope for crime and anti-social behaviour.

4.2.29 Given the lack of an evening economy and the high level of unit vacancy, we suspect that parts of the town centre provide an unwelcoming environment during the later hours.

Customer Views and Experience

4.2.30 To understand customers' views and experience, those household telephone survey respondents who indicated that they visit Grimsby Town Centre at least once a year were asked what they liked most and least about Grimsby Town Centre.

[34] There is no Stand I.

4.2.31 Table 4-3 shows the most popular responses to the question 'What do you like most about Grimsby Town Centre?'

Table 4-3: What respondents liked most about Grimsby Town Centre

Response	Proportion of respondents within the study area who gave each response (%)
Nothing	52.8
Close to home	6.8
Shops – good range of supermarkets	6.6
Don't know	5.7
Shops – good range of affordable shops	2.7
Shops – good range of non-food shops generally	2.3
Parking – it's easy to find a space	2.3
Shops – good range of clothes shops	2.1
Good for financial services (e.g. banks / building societies)	2.1
Has undercover shopping	1.8
Shops – good range of 'high street' retailers	1.6
Good layout / shops close together	1.6

Source: Household telephone survey (NEMS)

4.2.32 The overwhelming majority of the respondents stated that they liked nothing about Grimsby Town Centre, which is alarming considering it sits at the top of the borough's retail hierarchy and is a sub-regional centre. However, this finding provides further justification for the Council's emphasis on strengthening the vitality and viability of the borough's town centres.

4.2.33 Other responses included the centre's proximity to home, its range of supermarkets, affordable shops and non-food shops generally and the ease with which respondents can find parking spaces.

4.2.34 Table 4-4 shows the most popular responses to the question *'What do you like least about Grimsby Town Centre?'*

Table 4-4: What respondents like least about Grimsby Town Centre

Response	Proportion of respondents within the study area who gave each response (%)
Too many empty shops	27.1
Shops – need more / better range of non-food shops generally	14.2
Dirty streets / poorly maintained	6.0
Shops – need more / better clothes shops	5.1
Too many beggars	3.7
Lack of security / don't feel safe	3.7
Poor atmosphere / unfriendly people	3.5
Shops – need more 'high street' retailers	3.5
Not attractive / poor environment	3.1
Too much homelessness	2.3
Needa an update / revamp	2.3
Shops – need more quality shops	1.8

Source: Household telephone survey (NEMS)

4.2.35 In terms of what respondents liked least about Grimsby Town Centre, over a quarter thought there are too many empty shops. This corroborates our findings that there has been a substantial increase in the level of vacant floorspace within Grimsby Town Centre since the last study was undertaken, and the proportion of vacant units within the town centre is significantly above the UK average for all centres, as is the proportion of vacant floorspace.

4.2.36 Other prominent responses included a poor range of non-food shops, a poorly maintained environment and a poor range of clothes shops.

Environmental Quality

4.2.37 The majority of the town centre is unremarkable, with the notable exception of Abbeygate, an attractive arcade of high-quality specialist retailers and cafés/restaurants. St James' Square provides some welcome greenspace and appears to be a popular place to dwell; however, we consider that it could be enhanced to provide a more attractive setting to Grimsby Minster. At present, the buildings along the western, southern and eastern sides of the square lack an active frontage, which makes this area less vital and viable. However, we note the plans to transform the disused St James' House building into a business hub known as 'The Hive' which would have at least 23 business spaces to rent, offices and a rooftop events space. We welcome the work that is taking place to transform Riverhead Square to include additional trees and plants, new seating, lighting and an events space[35].

Figure 4-6: Abbeygate, Grimsby Town Centre

Source: Stantec

Extent of Evening Economy Offer

4.2.38 Despite its sub-regional status, the only restaurant chain present within the town centre is Pizza Hut. The town centre's evening economy offer is enhanced, however, by the independent food and drink operators located at Abbeygate, namely Abbys Bistro, BARE Street Kitchen, PAL Bar & Kitchen and Tredici.

[35] 'Next phase of Grimsby's Riverhead Square transformation begins'

4.2.39 Besides restaurants, Grimsby Town Centre has a number of hot-food takeaways, public houses, bars and a nightclub. We are supportive of the plans for a new cinema complex at Freshney Place, to entice more people into the centre in the evening and provide some family-orientated leisure facilities.

Summary

4.2.40 Grimsby Town Centre appears to be struggling and should be performing much better than it is currently, especially considering its sub-regional status and position at the top of the retail hierarchy. The town centre is in a period of transition, however, while the western section of Freshney Place Shopping Centre undergoes redevelopment to form a new cinema, leisure and entertainment hub in the heart of the town centre, and Grimsby's Top Town Market is rehoused and complete with a fresh new look to create a modern venue for people to shop and enjoy.

4.2.41 Whilst the proportions of comparison retail units and floorspace are not substantially below the UK average for all centres, it is evident from the range of national multiple retailers present that Grimsby has a mid-range fashion offer with a noticeable lack of high-end retailers, aside from a small number at Abbeygate. As would be expected, higher-order centres such as Leeds, Sheffield and Nottingham each boast a broader range of high-end comparison retailers.

4.2.42 In quantitative terms, Grimsby has a poor convenience retail offer, with its proportions of convenience retail units and floorspace significantly below the UK average for all centres. In qualitative terms, however, Grimsby has a reasonable convenience retail offer with a large Marks & Spencer Foodhall in the town centre and large Sainsbury's and Tesco Extra stores located immediately north of the town centre boundary.

4.2.43 There has been a substantial increase in the level of vacant floorspace across Grimsby Town Centre, which is nearly three times that recorded in 2013. Even after excluding the vacant units in Freshney Place which will be repurposed to form the new cinema complex and Community Diagnostics Centre, the vacancy rate would still be significantly above the UK average for all centres given the exceptionally high level of unit vacancy that exists at present.

4.2.44 Grimsby Town Centre has a mix of national multiple and independent retailers. National multiple retailers are concentrated within Freshney Place and Victoria Street, whilst independent retailers tend to be found outside of the primary shopping frontage. Abbeygate, located to the north of Grimsby Town Railway Station, is an attractive arcade of high-quality specialist retailers and restaurants/bars and represents a welcome improvement to the town centre's offer. The town centre environment is noticeably higher-quality within Abbeygate, which has attractive shop frontages, outdoor seating, planters and festoon lighting. On a related matter, we are supportive of the plans to transform Riverhead Square into an attractive and welcoming area outside of the main entrance to Freshney Place.

4.2.45 The town centre's evening economy offer is enhanced by the restaurants and bars located within Abbeygate. The redevelopment of the western section of Freshney Place should make Grimsby Town Centre a more attractive option for national restaurant chains, which would encourage linked trips between the new cinema complex and other parts of the town centre, improving its overall vitality and viability.

4.3 Performance of Cleethorpes Town Centre

4.3.1 Cleethorpes is identified as a main town centre within Policy 23 ('Retail hierarchy and town centre development') of the adopted Local Plan. The main shopping area is primarily focused on St Peter's Avenue, Market Street and High Street, but it also extends along the seafront (Alexandra Road).

Previous Findings

4.3.2 The Retail, Leisure and Three Centres Study (2013) found that Cleethorpes performed two roles, one serving the daily top-up needs of local residents and the other as a seaside tourist destination. The majority of retail activity in Cleethorpes was concentrated along St Peter's Avenue (the traditional linear high street), Market Street and High Street. The study reported that Cleethorpes boasted a quality independent retail offer, which helped distinguish it from the more mainstream sub-regional retail provision within Grimsby Town Centre. In terms of convenience retail, Cleethorpes primarily provided for the daily top-up needs of local residents. Whilst the town centre had several national multiple comparison retailers, its comparison retail offer was limited.

4.3.3 As a popular tourist destination, Cleethorpes also boasted a wide range of leisure facilities including restaurants, public houses, bars and clubs as well as amusement arcades along the seafront. These services catered for tourists from the holiday parks situated to the south of the town centre. Cleethorpes was found to be performing well with a low level of unit vacancy and its niche independent shopping offer was said to be a significant strength. The study found that, unlike other comparable small town centres, Cleethorpes had not lost any key retail anchors to larger centres, and its overall vitality had been maintained.

4.3.4 At the time the previous retail study was undertaken, the North East Lincolnshire Local Plan 2003 was the principal planning document within the Council's adopted development plan. The 2003 Local Plan identified Sea View Street as a local centre, located a short distance to the south of Cleethorpes Town Centre. Sea View Street is not identified as a local centre within the currently adopted Local Plan (2018), however, and it has been subsumed within the defined boundary for Cleethorpes Town Centre.

Diversity of Uses

4.3.5 Cleethorpes Town Centre has a total of 137 retail/service units, with a combined floorspace of 18,260 sq.m gross. The diversity of uses present in the town centre in terms of the number and proportion of units and floorspace is set out in Table 4-5, compared with the UK average for all centres.

Table 4-5: Diversity of Uses, Cleethorpes Town Centre (May 2024)

Cleethorpes Town Centre – Diversity of Uses						
Category	**No. of units**	**% of total units**	**UK (%)**	**Floorspace (sq.m)**	**Floorspace (%)**	**UK (%)**
Retail Services	18	13.1	14.9	1,710	9.4	7.5
Leisure Services	40	29.2	19.0	5,300	29.0	13.7
Comparison	36	26.3	33.4	5,530	30.3	37.8
Convenience	17	12.4	10.2	2,390	13.1	19.0
Financial and Business	7	5.1	6.0	1,000	5.5	4.8
Miscellaneous	1	0.7	1.0	130	0.7	0.7
Vacant	18	13.1	15.5	2,200	12.0	16.5
Total	**137**	**100**	**100**	**18,260**	**100**	**100**

Source: Stantec survey and Experian Goad (for UK averages, May 2024). Some of the percentage totals might not sum exactly to 100 per cent due to rounding.

4.3.6 The proportion of retail services recorded in Cleethorpes Town Centre (13.1 per cent) is slightly below the UK average for all centres (14.9 per cent), and slightly lower than the 13.9

per cent recorded by the previous study[36]. Retail services account for 9.4 per cent of floorspace in the town centre, which is greater than the UK average for all centres (7.5 per cent), reflecting the generally large nature of the units. The overwhelming majority of retail services are hairdressers and beauty salons.

4.3.7 Leisure services account for 29.2 per cent of town centre units and 29.0 per cent of total floorspace, in both cases significantly above the UK average for all centres, which reflects the town centre's strong food and drink offer and its role as a seaside resort. The town centre contains six fish and chip takeaways/restaurants, four of which are along the seafront (Alexandra Road), reflecting its role as a tourist destination. The previous study reported that 'A3-A5' uses accounted for 31.6 per cent of the total units in Cleethorpes Town Centre in August 2013. As such, there has been a slight decrease in the proportion of food and beverage outlets in the period since the previous study, but Cleethorpes still maintains a very healthy food and drink offer.

Figure 4-7: Tourism offer within Cleethorpes Town Centre (Alexandra Road)

Source: Stantec

4.3.8 The town centre also boasts a range of bars (0 Degrees North, Platform, Rift & Co, Scratching Post, Teddy's Bar, The Barracuda Bar, The Bobbin and Tipsy Terrace), bars and restaurants (Figs and The Studio), public houses (The Coliseum Picture Theatre, The Dolphin, The Market Tavern, The Old Vic and The Swashbuckle) and amusements (Fantasy World and The Empire) as well as a nightclub (The Beach Cleethorpes). These uses are, however, excluded from the Experian Goad based diversity of uses analysis.

4.3.9 Overall, Cleethorpes has a much more varied leisure offer than the quantitative assessment suggests. The town centre's leisure uses not only cater for local residents and tourists, but

[36] The 2013 Study referred to 'Retail Services' (A1), 'Professional' (A2), 'Food and Drink' (A3-A5) and 'Other Services'. The Study did not calculate the proportion of units or floorspace, and so we have calculated them ourselves.

they also serve the wider borough because Cleethorpes is the entertainment centre for North East Lincolnshire, amongst its other roles.

4.3.10 Comparison retail units account for 26.3 per cent of town centre units – almost identical to the 25.9 per cent recorded in August 2013 – and 30.3 per cent of the town centre's total floorspace is recorded as comparison retail floorspace. In quantitative terms, the town centre falls below the UK average for all centres, both in terms of the proportion of comparison retail units and floorspace. Cleethorpes tends to attract smaller independent retailers, however – as opposed to more mainstream retail – and so this finding is not surprising. The strongest comparison goods sub-sectors are *'charity shops, pets and other comparison', 'chemists, toiletries and opticians'* and *'women's, girls and children's clothing'*. The town centre has no representation in the *'variety, department & catalogue showrooms'* sub-sector and the proportions of businesses falling within the *'mixed and general clothing'* and *'furniture, carpets & textiles'* sub-sectors are considerably below the UK average for all centres.

4.3.11 Convenience goods retail provision is above the UK average for all centres in terms of the proportion of total units. The proportion of floorspace (13.1 per cent) is significantly below the UK average for all centres (19.0 per cent), however, suggesting that Cleethorpes Town Centre has a greater proportion of smaller convenience stores as opposed to larger foodstores. The town centre's convenience retail offer includes Co-operative Food, Go Local, Sainsbury's Local and Heron Foods.

4.3.12 The proportion of financial and business services is close to the UK average for all centres both in terms of the number of units (5.1 per cent versus 6.0 per cent) and floorspace (5.5 per cent versus 4.8 per cent). Cleethorpes Town Centre has two *'banks & financial services*', two *'building societies'* and three *'estate agents & auctioneers'.*

4.3.13 Cleethorpes has one unit which falls within the miscellaneous sub-sector '*employment, careers, Post Offices & information*', which equates to representation broadly in line with the UK average for all centres, both in terms of the number of units and floorspace.

4.3.14 There were 18 vacant units within Cleethorpes Town Centre in May 2024, equating to a vacancy rate below the UK average for all centres both in relation to the proportion of units and floorspace. We explore that key indicator in greater detail, below.

4.3.15 Whilst tourist accommodation is not assessed as part of this study, the town centre contains a range of independent guesthouses, concentrated along Isaacs Hills and Albert Road. In addition, there are several large caravan and holiday parks to the south of the town centre (such as Haven), which will boost footfall in the town centre during the holiday season.

Proportion of Vacant Property

4.3.16 The proportion of vacant units across the town centre (13.1 per cent) is below the UK average for all centres (15.5 per cent), as is the proportion of vacant floorspace (12.0 per cent versus 16.5 per cent). Whilst this initially appears to be a sign of good health, the proportion of vacant units has increased by approximately 5.5 percentage points since the previous study was undertaken in August 2013, signifying a deterioration in the health of the centre. The vacancy rate in Cleethorpes is, however, favourable when compared with the other study centres, and the vacant units are dispersed across the town centre rather than being clustered in any particular locations.

Retailer Representation

4.3.17 Cleethorpes Town Centre contains a greater proportion of independent retailers than national multiple retailers. Those national multiple retailers that are represented tend to be located along St Peter's Avenue, the traditional linear high street. National multiple retailers include booksellers (The Works), cards and gifts (Card Factory), charity shops (Barnardo's, British

Heart Foundation and British Red Cross), fashion and footwear operators (Peacocks), health and beauty (Boots and Superdrug), opticians (Specsavers) and travel agents (TUI).

4.3.18 The town centre has a limited fashion and footwear offer with one shoe repair store (Shoey's), two women's clothing stores (Fawn and Pretty Woman), two children's clothing stores (Betty McKenzie and Greenswear), one men's clothing store (Forw4rd) and one mixed clothing store (Peacocks). Such an offer is fairly typical for a town the size of Cleethorpes, which primarily caters for the daily top-up needs of local residents and visiting tourists. National multiple fashion retailers are more likely to locate in larger centres.

4.3.19 The town centre's convenience retail offer includes bakers (Cooplands, Greggs), butchers (Sandham's Quality Meats), fishmongers (Gresham Fisheries), frozen foods (Heron), tobacconists and off-licenses (E-Cigarette Outlet, Eco Vape, A-Z Booze) and convenience stores (7 Days Express, All in One Convenience Store, Co-operative Food, Go Local, Sainsbury's Local, William's). There are no large foodstores within the town centre. A Tesco Extra superstore is located at Hewitts Circus Retail Park to the south-west of the town centre and a Lidl store is located at Ladysmith Road to the west of the town centre.

4.3.20 The town centre's food and drink offer includes cafés (Gallagher's, Harriets, Lilly's Little Gem, Riverhead Coffee, Susie's Cup of Coffee, Toven's Café), restaurants (Beyoglu, Dough Bros, Eastern Delight, Fez, Jamal's, La Bella, Me 2 Raj, Nawaabz, Paw Thai, Shanghai Express, Steel's Corner House, Valentino) and hot food takeaways (Chicago Burger, Delicious, Domino's Pizza, Magic Flame, Marco Polo Pizzeria & BBQ, Pepi's, Smash Burger, The Kebab House, Vegas Grill). We listed some of the public houses, bars and nightclubs that Cleethorpes boasts earlier in this section.

4.3.21 Cleethorpes Outdoor Market is located at Market Square and operates every Wednesday and Saturday from April through to September, weather permitting. The market is commonly known for its flower and plant displays, which we observed during our visit, as well as clothing. The market is seeking to attract new traders including craft makers, bakers, fishmongers, pet stalls, sweet stalls, butchers, clothing and homeware traders, to bring greater variety to Market Square. Financial incentives include eight weeks' of trading for the price of four.

Balance between Independent Retailers and National Multiples

4.3.22 As mentioned above, Cleethorpes contains a higher proportion of independent retailers than national multiple retailers. The majority of national multiple retailers are situated along St Peter's Avenue.

Accessibility and Pedestrian Flows

4.3.23 Cleethorpes Town Centre is accessible by car and approximately 7 minutes' drive from the A16, a principal road in Lincolnshire which connects the port of Grimsby in the north to Peterborough (Cambridgeshire) in the south. A number of surface level car parks are located near to the main shopping area. Car parking charges range between £2.50 and £3.50 for two hours' parking, which we consider to be reasonable.

4.3.24 There are several bus stops along St Peter's Avenue, High Street and Alexandra Road, which provide services to Grimsby Town Centre, Hewitts Circus and Waltham, among others.

4.3.25 Cleethorpes Train Station is located to the north-east of the town centre along the seafront. Frequent TransPennine Express services connect Manchester to Cleethorpes in 2 hours 30 minutes, while Northern trains run from Barton-upon-Humber to Cleethorpes in approximately 50 minutes. Wayfinding between the train station and the town centre could be much improved.

4.3.26 Pedestrian access to the town centre from the surrounding residential areas to the north, west and south is good.

4.3.27 In the absence of formal footfall surveys for Cleethorpes Town Centre, we provide a high-level overview of pedestrian flows based on our visit to the centre. We found the centre to be relatively busy during our visit – a late Wednesday morning in May – with pedestrian activity highest along St Peter's Avenue. We suspect that pedestrian activity along Alexandra Road is higher in the summer months as local residents and tourists visit Cleethorpes Beach.

4.3.28 The primary objective for the town centre as outlined within the Cleethorpes' Masterplan is to create a retail-led loop linking the promenade to the town centre. The proposed loop consists of Alexandra Road, Market Street, St Peter's Avenue, Cambridge Street and Sea View Street (see Figure 4-8 below).

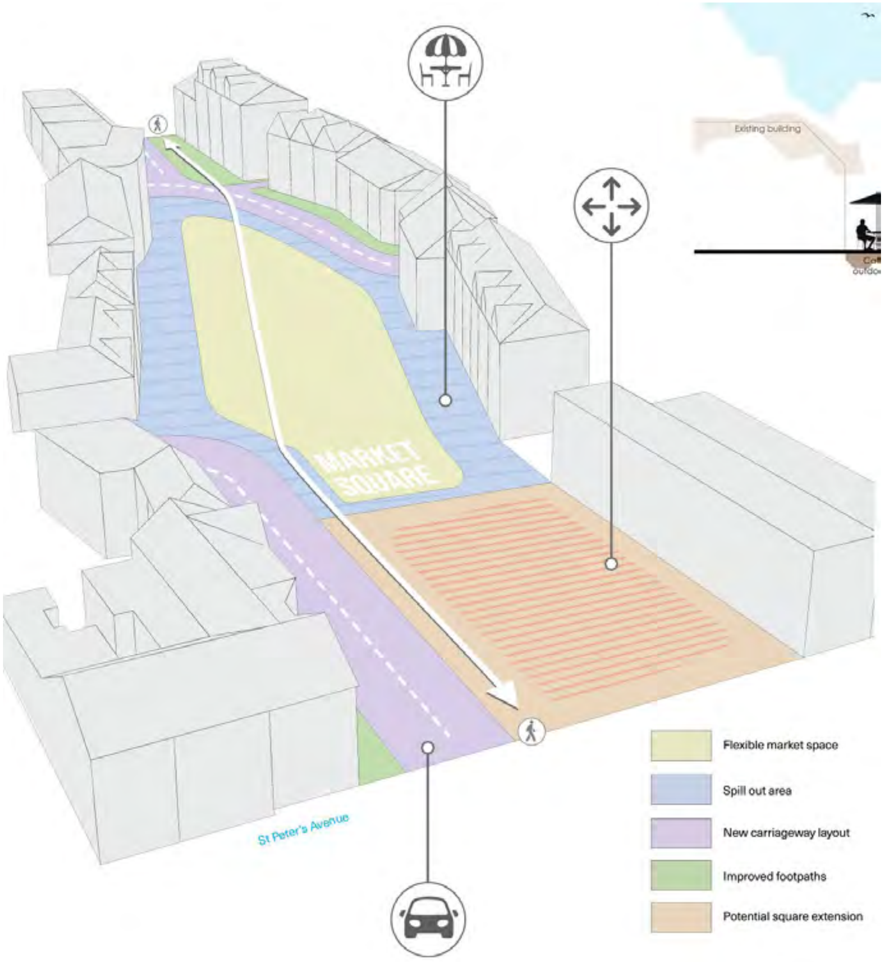
Figure 4-8: Proposed retail-loop in Cleethorpes

Source: Cleethorpes Masterplan 2022

4.3.29 The Masterplan notes that there are opportunities to extend the historic property improvements (implemented via The National Lottery Heritage Fund's Townscape Heritage programme) along Alexandra Road into Market Street, Short Street and St Peter's Avenue by encouraging freeholders to improve shop frontages and façades. Public realm improvements and footpath widening would also encourage movement along Market Street. Interventions along St Peter's Avenue need only be small-scale and should include improving shop frontages and the historic streetscape as well as a co-ordinated approach to street furniture. Cambridge Street is predominantly residential in nature and is the key link between St Peter's Avenue and Sea View Street. The Masterplan calls for the following interventions along Cambridge Street: footpath widening, public realm improvements and extending the current Townscape Heritage improvements so that it feels like an extension of St Peter's Avenue. Given the recent Townscape Heritage works to Alexandra Road, only minimal work is required including the occasional raised crossing to provide safer access to Cleethorpes' Pier Gardens.

4.3.30 Options that are being considered for Market Square include the pedestrianisation of the square to create a flexible and safe space which can host markets, food festivals and retail-related events, and defensible boundaries which will encourage al-fresco dining. Public realm interventions and green infrastructure should be used to help define the distinct spaces. A key consideration is the re-routeing of traffic and the reprovision of parking spaces.

Figure 4-9: Market Square Design Principles



Source: Cleethorpes Masterplan

Perception of Safety and Occurrence of Crime

4.3.31 The town centre felt safe during our visit. We suspect this is the same in the evening given the widespread presence of street lights and the footfall generated by the centre's restaurants, bars and public houses.

Environmental Quality

4.3.32 Whilst the town centre environment is of reasonable quality overall, the tourist end of the centre is markedly dated, including the amusements along the sea front as well as some of the retail/service units along Alexandra Road which primarily cater for tourists.

Figure 4-10: The Cleethorpes town centre environment

Source: Stantec

Figure 4-11: Fantasy World (amusements) and Browns (fish and chips) along sea front (outside of defined town centre boundary)

Source: Stantec

4.3.33 The street trees along St Peter's Avenue create a pleasant environment and Cleethorpes Pier Gardens (to the east of the town centre) provides some welcome greenspace. Cleethorpes Beach appeared to be well-kept with plentiful parking.

4.3.34 The town centre encompasses a number of traditional/period properties with some architectural interest.

Extent of Evening Economy Offer

4.3.35 As mentioned earlier, Cleethorpes has a good range of restaurants, bars, public houses and nightclubs which provide for a healthy evening economy offer.

Summary

4.3.36 Overall, Cleethorpes Town Centre appears to be performing reasonably well. The town centre serves the daily top-up needs of local residents as well as being a tourist destination for day trippers and overnight visitors. Despite the proportion of comparison retail units being below the UK average for all centres, the centre boasts a good range of independent retailers and national multiple retailer representation in line with its size and function(s).

4.3.37 The town centre has a strong food and drink offer, some of which is geared towards the tourist end of the market (fish and chips restaurants/takeaways).

4.3.38 Despite the town centre's vacancy rate increasing by 5.5 percentage points since the previous study, it remains below the UK average for all centres and is less than half the vacancy rate in Grimsby, Immingham and Freeman Street.

4.3.39 Cleethorpes has a greater proportion of independent retailers than national multiple retailers; however, there is still a sufficient.

4.3.40 The town centre is accessible by different modes of travel, but the centre would benefit from improved wayfinding between the train station and the centre itself.

4.4 Performance of Immingham Town Centre

4.4.1 Immingham is identified as a small town centre within Policy 23 ('Retail hierarchy and town centre development') of the adopted Local Plan.

4.4.2 Immingham is a small town in the north west of the borough. The town centre is unusual in that roughly half of it has been redeveloped over recent years to form a retail park, with the few remaining units within the traditional part of the centre catering for a very localised market (this section of the centre is akin to a local centre as opposed to a district or town centre). The traditional part of the centre comprises a post-war purpose-built shopping precinct (Kennedy Way), whilst the units within the retail park are centred around a car park. Aldi and Farmfoods are located beyond Washdyke Lane to the east.

Figure 4-12: Retail park (top left) and purpose-built shopping precinct (other images)

Source: Stantec

Previous Findings

4.4.3 At the time the previous retail study was undertaken, the proposals to partially redevelop the town centre had been formally approved but ongoing revisions to the approved scheme meant that large parts of the shopping centre were vacant awaiting redevelopment. Immingham was found not to be performing its intended role as the main retail/service centre for local residents in the north of the borough. The health check assessment identified substantial weaknesses in the town centre's retail offer with a significant number of vacant units, a poor town centre environment and a lack of genuine choice and quality in terms of existing retail and service provision.

4.4.4 The quantitative assessment revealed very low levels of local resident expenditure being retained within the town centre, in terms of both retail and leisure trips, and significant expenditure leakage to mainstream provision in Grimsby (town centre, freestanding foodstores and out-of-centre retail parks). It was anticipated that the implementation of the approved scheme would bring significant improvements in the performance of the town centre including increased footfall, enhancing the attractiveness of the town centre in physical and commercial terms and reducing the need to travel for everyday shopping needs. Moreover, it was considered that the partial redevelopment would enable Immingham to perform its town centre function within the retail hierarchy and adequately serve those residents within the north of the borough.

Diversity of Uses

4.4.5 Immingham Town Centre contains a total of 27 retail/service units, which is a substantial reduction in the number of retail/service units reported by the previous study (40), owing to the centre's partial redevelopment. We are unable to report on the quantum and proportion of floorspace within the town centre given that a Goad plan of the town centre does not exist. The diversity of uses present in the town centre in terms of the number and proportion of units is set out in Table 4-6, compared with the Goad UK average for all c.1,950 centres and shopping locations covered by Experian.

Table 4-6: Diversity of Uses, Immingham Town Centre (May 2024)

Immingham Town Centre – Diversity of Uses			
Category	**No. of units**	**% of total units**	**UK (%)**
Retail Services	2	7.4	14.9
Leisure Services	3	11.1	19.0
Comparison	7	25.9	33.4
Convenience	6	22.2	10.2
Financial and Business	1	3.7	6.0
Miscellaneous	0	0.0	1.0
Vacant	8	29.6	15.5
Total	**27**	**100**	**100**

Source: Stantec survey and Experian Goad (for UK averages, May 2024). Some of the percentage totals might not sum exactly to 100 per cent due to rounding.

4.4.6 The proportion of comparison goods retailers present in Immingham Town Centre is below the UK average for all centres, but caution should be exercised when interpreting the figures in the diversity of uses table given the relatively small number of units across the centre. Those comparison goods retailers that are represented tend to be national multiple retailers (Barnardo's, B&M Bargains, Card Factory, Home Bargains and Poundstretcher), some of which are typically found within (out-of-centre) retail parks.

4.4.7 The proportion of convenience goods retailers is more than double the UK average for all centres and, despite not being able to assess the proportion of floorspace given that a Goad plan does not exist for the centre, it would be fair to assume that the proportion of floorspace occupied by convenience goods retailers is significantly above the UK average for all centres due to the presence of three large foodstores (Aldi, Farmfoods and Tesco).

4.4.8 The proportion of retail services is roughly half the UK average for all centres, with the centre having just one barber shop (Immingham Barber) and one nail salon (Top Nails). Similarly, the proportion of leisure services is significantly below the national average, which reflects the composition of the centre (retail park and shopping precinct).

4.4.9 The proportion of financial and business services in Immingham Town Centre is below the UK average for all centres, with just one estate agents (Croft Estate Agents).

4.4.10 Immingham Town Centre's vacancy rate is almost double the UK average for all centres (29.6 per cent versus 15.5 per cent). We explore that indicator further, below.

4.4.11 Immingham also contains a number of common town centre uses that are not included within Experian's Centre Report, including two betting offices (Betfred and Coral), a civic centre and a learning centre.

Proportion of Vacant Property

4.4.12 Immingham Town Centre has eight vacant units, all of which are found within the shopping precinct (Kennedy Way). The concentration of vacant units has a negative impact on the town centre environment.

Retailer Representation

4.4.13 In terms of comparison retail, Immingham Town Centre has a card shop (Card Factory), a charity shop (Barnardo's), household goods outlets (B&M Bargains and Home Bargains), opticians (Smith and Walker Optometrists), a pharmacy (Immingham Pharmacy) and a variety store (Poundstretcher).

4.4.14 Convenience retailers include a bakery (Cooplands Bakery), a butcher (Sandham's Quality Meats), grocery stores (Aldi and Tesco) and frozen food outlets (Farmfoods and Heron Foods).

4.4.15 Immingham's food and drink offer is limited to a café (First Stop Café), a sandwich bar (Subway) and a takeaway (Little Italy).

Balance between Independent Retailers and National Multiples

4.4.16 Immingham Town Centre has 13 national multiple retail/service operators and eight independent retail/service operators[37]. The centre therefore has a healthy representation of national multiple retailers for such a small centre. All of the units within the retail park are occupied by national multiple retailers.

Accessibility and Pedestrian Flows

4.4.17 Immingham is accessible via car, with the B1210 located approximately 800m to the west of the centre and the A1173 approximately 1km to the east, which connects onto the A180 in the south. The centre is well served by parking spaces, with the car park at the centre of the retail park, a separate car park for those using Aldi and Farmfoods and additional parking to the rear of Kennedy Way off Alden Close.

4.4.18 The nearest bus stop is located at the foot of Kennedy Way, with relatively frequent services to Grimsby Town Centre.

4.4.19 Given its size, Immingham does not have its own train station. The nearest train station is Habrough, which is located approximately 3.8km to the south-west of the town centre and provides services to Grimsby, Cleethorpes, Liverpool Lime Street, Leicester and Barton-upon-Humber. There are no buses from Habrough Train Station to Immingham; visitors would have to get the train to Stallingborough, take a short walk and a number 5 bus to the town centre. Habrough Train Station is a 5-minute drive and c.1 hour walk from Immingham Town Centre. As such, Immingham is not very accessible via train.

4.4.20 Pedestrian access to the town centre from the surrounding residential areas is good, with a toucan crossing located at the foot of Kennedy Way. Kennedy Way itself is pedestrianised and there is a zebra crossing near the junction of Washdyke Lane and Beechwood Avenue which

[37] The number of national multiple and independent retail/service operators is not equal to the total number of units in the centre because the former does not include vacant units and community uses.

might encourage linked trips between the main part of the town centre (retail park and shopping precinct) and Aldi and Farmfoods to the east of Washdyke Lane.

4.4.21 Immingham was relatively quiet during our visit.

Perception of Safety and Occurrence of Crime

4.4.22 The centre felt safe during our visit, which we attribute to its layout. The arrangement of the retail park around the central car park coupled with the residential units above the retail/service units along Kennedy Way serves to increase levels of surveillance within the town centre during the day. At night, however, we suspect that the centre may feel somewhat unsafe due to the expansive car parks (albeit these are lit) and rear service areas either side of Kennedy Way.

Environmental Quality

4.4.23 We consider the environmental quality within the traditional part of the centre to be relatively poor. The redeveloped part of the centre is typical of an out-of-centre retail park and comprises large warehouse-type buildings, but the purpose-built shopping precinct is dated, poor quality and does not provide an attractive town centre environment. It is evident that the Council has tried to add more greenery to the centre through the use of planters; however, these do little to improve the attractiveness of the centre. Bringing the vacant units back into use would enhance the town centre environment and help to achieve an active frontage.

Figure 4-13: Immingham's town centre environment

Source: Stantec

Extent of Evening Economy Offer

4.4.24 Besides one takeaway (Little Italy), Immingham does not have an evening economy offer and therefore we expect that the town centre is very quiet during the evening/night-time.

Summary

4.4.25 Immingham is a very unusual centre and is not really a town centre in the traditional sense. The shopping precinct is akin to a local centre catering for a very localised market, whereas the redeveloped part of the town centre is essentially a retail park, which is likely to attract people from a wider catchment. There is a striking disparity between the environmental quality of the retail park and that of the shopping precinct.

4.4.26 Whilst the centre as a whole has a good range of convenience retailers, with several foodstores represented at the retail park, its vacancy rate is almost double the national average due to a large proportion of the units within the older precinct being unoccupied.

4.4.27 The centre is accessible via foot and car but not very accessible via public transport, and it does not have an evening economy offer. As such, local residents travel to Grimsby and Cleethorpes to access restaurants, public houses, bars and nightclubs. For example, 19.8 per cent of household survey respondents last visited Cleethorpes to go to a restaurant and the equivalent figure for Grimsby was 14.7 per cent.

4.4.28 Aside from a single charity shop, the centre is not represented by any clothing or footwear outlets.

4.4.29 Immingham primarily serves the immediate residential catchment, albeit the larger foodstores and household goods/variety stores attract people from a wider area.

4.5 Performance of Freeman Street District Centre

4.5.1 Freeman Street is identified as a district centre within Policy 23 (‘Retail hierarchy and town centre development’) of the adopted Local Plan. The Local Plan acknowledges that the centre has an increasingly local focus and convenience retail offer and is therefore more akin to a local centre, but its scale and catchment afford it district centre status.

4.5.2 The district centre is a long, linear centre located to the east of Grimsby Town Centre beyond the railway line. The centre covers a c.680-metre stretch of Freeman Street, from its junction with Church Street in the north to its junction with Ellis Way and Eleanor Street in the south. The centre stretches westwards between Nelson Street and Garibaldi Street and eastwards between Garibaldi Street and Duncombe Street. The Asda superstore which is sandwiched between the railway line and Freeman Street is also within the defined district centre boundary.

4.5.3 We previously explained that the Goad definition of Freeman Street District Centre covers a larger area than the defined district centre boundary. The effect is that the diversity of uses analysis includes a greater number of retail/service units than are actually present within the defined district centre boundary. However, for the purpose of the diversity of uses analysis, the previous retail study (2013) covered a very similar area to that considered as part of this study (albeit our study also includes those units between Ellis Way/Eleanor Street and Pasture Street). As such, meaningful comparisons can be made with the previous retail study.

Previous Findings

4.5.4 At the time the previous retail study was undertaken, Freeman Street was one of two distinct areas in Great Grimsby, the other being Top Town[38] (what is now known as Grimsby Town Centre). The 2013 Study reported that Freeman Street was historically the main thoroughfare linking Top Town to the docks; however, its importance as a retail/service centre had declined significantly over the years as national multiple retailers relocated due to the demise of the fishing industry and Top Town (now Grimsby Town Centre) becoming a more prominent retail destination.

4.5.5 The 2013 Study explained that Freeman Street had become physically detached from Grimsby Town Centre, and was forming its own unique identity with a diverse range of convenience retailers and building on its links to the past, for example with Freeman Street

[38] Top Town comprised the main shopping area around Victoria Street and the Freshney Place Shopping Centre.

Market. The 2013 Study therefore recommended that Freeman Street should become a defined district centre and its boundaries be revised. The proposed boundary changes included removing the stretch of Freeman Street between Cleethorpe Road and Nelson Street and removing the stretch of Cleethorpe Road between its junction with Freeman Street and Humber Street. The 2013 Study recommended that the amended area should become a new local centre, Cleethorpe Road Local Centre. The current defined district centre boundary reflects the findings of the previous retail study, namely:

- *'the extent of vacancies in the existing defined centre - there is a clear requirement to physically consolidate the shopping area into a viable entity which will encourage linked trips and activity;*
- *the decreasing importance of Freeman Street as a shopping destination in the Borough - the quantitative analysis in particular details that the centre performs a secondary role for comparison retail shopping…The centre also has a limited services and leisure function; and*
- *its geographical separation from Top Town and the requirement to distinguish both centres in hierarchical terms so as to enable a viable centre-specific strategy to be developed for both Top Town and Freeman Street.'*

4.5.6 The 2013 Study reported that the district centre was anchored by the indoor market in the north and the large Asda superstore in the south, but recognised that the connections between the Asda store and the rest of the district centre were very poor. The Local Plan (2018) therefore pledged to improve those connections.

4.5.7 The previous study found that, given the nature of the outlets within Freeman Street and its limited comparison retail offer, there is limited capacity to substantially improve its retail/service offer. The plans to transform the land where the East Marsh tower blocks once stood have yet to come into fruition, leaving the land vacant and overgrown. The exception to this is the YMCA's new Humber headquarters, which have been built at the junction of Kent Street and Freeman Street.

4.5.8 The Freeman Street Regeneration and Development Study (2015) was commissioned to examine options for the redevelopment of the East Marsh area. The Study highlighted a number of key drivers that should influence the centre's future development, including:

- a flexible mixed-use approach to future land uses, to encourage investment and diversity;
- new perceptions through place-making, with new development encouraged to support the 'rebranding' of the Freeman Street area; and
- a new definition for Freeman Street, in terms of its role, land use and boundaries.

Diversity of Uses

4.5.9 Freeman Street District Centre encompasses a total of 238 retail/service units. The diversity of uses present in the district centre in terms of the number and proportion of units is set out in Table 4-7, compared with the Goad UK average for all c.1,950 centres and shopping locations covered by Experian.

Table 4-7: Diversity of Uses, Freeman Street District Centre (May 2024)

Freeman Street District Centre – Diversity of Uses						
Category	**No. of units**	**% of total units**	**UK (%)**	**Floorspace (sq.m)**	**Floorspace (%)**	**UK (%)**
Retail Services	24	10.1	14.9	4,620	7.7	7.5
Leisure Services	19	8.0	19.0	1,950	3.2	13.7
Comparison	69	29.0	33.4	18,770	31.0	37.8
Convenience	34	14.3	10.2	19,440	32.2	19.0
Financial and Business	5	2.1	6.0	1,410	2.3	4.8
Miscellaneous	2	0.8	1.0	200	0.3	0.7
Vacant	85	35.7	15.5	14,010	23.2	16.5
Total	**238**	**100**	**100**	**60,400**	**100**	**100**

Source: Stantec survey and Experian Goad (for UK averages, May 2024). Some of the percentage totals might not sum exactly to 100 per cent due to rounding.

4.5.10 The proportion of retail services (10.1 per cent) is below the UK average for all centres (14.9 per cent), but represents a near doubling of the 5.1 per cent recorded by the 2013 Study. Retail services account for 7.7 per cent of floorspace in the district centre, which is almost identical to the UK average for all centres (7.5 per cent).

4.5.11 The proportion of leisure services (8.0 per cent) is substantially lower than the UK average for all centres (19.0 per cent), as is the proportion of floorspace (3.2 per cent versus 13.7 per cent). Leisure services accounted for 9.5 per cent of units at the time of the previous study and 5.3 per cent of floorspace. As such, there has been a substantial reduction in the proportion of leisure services units and floorspace since 2013. Freeman Street's leisure services include ten hot food takeaways, four cafés, two restaurants, one sandwich bar, one coffee shop and one ice cream parlour.

4.5.12 Comparison retail units account for 29.0 per cent of district centre units, equating to 31.0 per cent of floorspace, both of which are below the UK average for all centres. The strongest comparison goods sub-sector, by a large margin, is *'furniture, carpets & textiles'*, with 21 units (out of a total of 69 units). The second strongest comparison goods sub-sector is *'charity shops, pets and other comparison'* with ten units, closely followed by *'DIY, hardware & household goods'* with nine units and *'electrical, home entertainment, telephones and video'* with eight units. The district centre's comparison retail offer is therefore heavily focused around household materials, tools and items. Freeman Street has a very poor fashion offer with just one unit in each of the following sub-sectors, *'footwear & repair'*, *'men's and boys' wear'* and *'women's, girls' & children's clothing'*.

4.5.13 The proportion of units that are occupied by convenience retailers is 14.3 per cent, which equates to 31 per cent of floorspace, in both cases above the UK average for all centres, and substantially so in terms of the proportion of convenience retail floorspace. This is primarily due to the presence of the large Asda superstore, which accounts for 8,470 sq.m of floorspace alone. The district centre also contains a reasonably large Iceland foodstore (1,980 sq.m). The 2013 Study reported that convenience retail accounted for 5.9 per cent of the total units in Freeman Street District Centre, equating to a floorspace of 26.4 per cent, and so there has been a significant increase in the number of convenience retail outlets with relatively small floorplates.

4.5.14 The proportion of businesses within the financial and business services sub-sector is lower than the UK average for all centres, both in terms of the number of units and the proportion of floorspace. Freeman Street has three '*banks and financial services*' and two '*estate agents & auctioneers*'.

4.5.15 Freeman Street has two units which fall into the miscellaneous sub-sector, '*employment, careers, Post Offices & information*'.

4.5.16 There are 85 vacant units within Freeman Street District Centre. Whilst this represents a reduction on the 105 vacant units reported in 2013, more than one-third of total units across the centre are currently unoccupied and Freeman Street District Centre has by far the highest vacancy rate of the four study centres. The level of unoccupied units at Freeman Street is even higher than the vacancy rate recorded in Grimsby Town Centre, which has been skewed upwards by the high number of vacant units within Freshney Place ahead of its redevelopment.

4.5.17 The district centre also contains a number of town centre uses that are not included within Experian's Centre Report, including public houses, a nightclub, betting offices, theatres, solicitors, offices and a foodbank.

Proportion of Vacant Property

4.5.18 The proportion of vacant units across the centre (35.7 per cent) is more than double the UK average for all centres (15.5 per cent), and the proportion of vacant floorspace (23.2 per cent) is also substantially greater than the UK average for all centres (16.5 per cent).

4.5.19 Vacant units can be found throughout the centre but there are particular concentrations in the northern part of the centre at the junction of Cleethorpe Road and Freeman Street and on the southbound side of Freeman Street between Kent Street and Nelson Street. It is worth noting that these areas are outside of the defined district centre boundary, but they nevertheless present a bleak picture. In one case there are seven vacant units in a row. Such concentrations of vacant units make those parts of the district centre completely unviable from a commercial perspective and worsen the already hostile town centre environment.

4.5.20 Not only is there a very high level of unit vacancy, but many of the unoccupied properties are derelict and/or in need of demolition, which makes it highly likely that most or all of them will remain vacant.

Retailer Representation

4.5.21 The overwhelming majority of comparison retailers are independently owned, with notable exceptions including Age UK, Boyes, British Heart Foundation, Poundland and Timpson (within the Asda foodstore). Freeman Street has a poor-quality comparison retail offer, with mainstream retailers more likely to choose nearby Grimsby Town Centre.

4.5.22 The district centre's convenience retail offer includes bakers (Cooplands), delicatessens (Slavika and Waltham Kitchen Delicatessen), butchers (A.R. Needham Butchers and S&J Meats), grocers (Al-Madina, Baltic Shop, Delicii Romanesti, International Foods, Issy, Jowita, Oriental Spices, Poli-Maxx, Stop N Shop and Zam Zam), frozen foods (Farmfoods, Heron Foods and Iceland), CTN and convenience stores (Arian News, Casa Romaneasca, Costcutter, Fam Market, Food Plus, Freeman Stores, Golden Mini Market, Honey Mini Market, Londis, Top Corner Shop, Top Local Store and Vapes) and a large-format foodstore (Asda).

4.5.23 Freeman Street Market is an indoor market which is open every Tuesday, Friday and Saturday between the hours of 08.00 and 16.00 (with select stalls open every Wednesday and Thursday between the hours of 08.30 and 14.00). We visited the market at midday on a Wednesday and found footfall to be low. The market sells fresh produce and local goods. Experian categorised the market as a *'greengrocers & fishmongers',* albeit it sells a more diverse range of products; however, each retail/service unit can only be assigned one Goad code. As such, the floorspace figures are skewed towards convenience retail.

Figure 4-14: Freeman Street Market

Source: Stantec

4.5.24 As mentioned above, Freeman Street's leisure services include ten hot food takeaways, four cafés, two restaurants, one sandwich bar, one coffee shop and one ice cream parlour, all of which are independently owned. The district centre's food and drink offer is poor quality. Furthermore, most takeaways open late afternoon/early evening and therefore create the impression that there is an even higher level of unit vacancy.

Balance between Independent Retailers and National Multiples

4.5.25 The vast majority of retail and service providers at Freeman Street District Centre are independently owned, with national multiple retailers more likely to locate in Grimsby Town Centre.

Accessibility and Pedestrian Flows

4.5.26 Freeman Street District Centre is accessible via car, being located a short distance from the A16 and A180. There are several car parks serving the centre including facilities at Garibaldi Street, Thesiger Street, Wellington Terrace, Orwell Street West and Orwell Street East. Customer-only parking is available at Asda and is free for up to 3 hours. Some short-stay on-street parking is also available.

4.5.27 Grimsby Docks Train Station, located to the west of the centre opposite Kent Street, offers services to Cleethorpes and Barton-upon-Humber.

4.5.28 There are numerous bus stops along Cleethorpe Road and Freeman Street, which provide services to Cleethorpes Pier, Grimsby Town Centre, Hewitts Circus, Morrisons (Hillmore Road) and Waltham.

4.5.29 Pedestrian access from the west of the centre is poor as the railway line acts as a physical barrier, whereas pedestrian access from the residential areas to the south and east is good.

4.5.30 Pedestrian activity was quite low during our visit, although the Asda superstore was much busier. The previous retail study commented that the Asda store performs a strong anchor function for the southern part of the district centre. However, we consider that the Asda foodstore is unlikely to serve as a true ‘anchor’ and there is probably a very low level of linked trips with the centre given how poor quality the offer is.

Perception of Safety and Occurrence of Crime

4.5.31 The centre felt reasonably safe during our visit, which we attribute to the steady flows of vehicular traffic along Cleethorpe Road and Freeman Street. Some of the side streets, however, were very quiet and we suspect that these parts of the district centre are forbidding during late/dark hours.

Environmental Quality

4.5.32 The environmental quality of the district centre is exceptionally poor with over a third of the retail and service units lying vacant and many properties derelict and/or in need of demolition. It is worth noting that the areas with the highest concentrations of vacant units (that is, at the junction of Cleethorpe Road and Freeman Street and on the southbound side of Freeman Street between Kent Street and Nelson Street) are outside of the defined district centre boundary. Nevertheless, the centre is bleak and lacks greenery and focal points. The Council has used different paving and street lighting in an attempt to signify where the district centre starts and ends; however, we still consider the centre to be ill-defined both physically and perceptually given the continuation of retail and service units along Freeman Street, albeit sporadically in places due to the high level of unit vacancy, with the effect that the district centre appears to extend northwards towards Cleethorpe Road.

4.5.33 The steady flow of vehicular traffic along Cleethorpe Road and Freeman Street does not provide for a pleasant shopping experience, albeit there are several zebra crossings facilitating pedestrian movement throughout the centre.

Figure 4-15: Freeman Street’s town centre environment

Source: Stantec

Extent of Evening Economy Offer

4.5.34 The district centre has a poor evening economy offer, limited to hot-food takeaways, public houses, a nightclub and a theatre.

Summary

4.5.35 We consider Freeman Street to be an exceptionally low-grade and unhealthy centre which is strung out over too wide an area, with a poor-quality comparison retail offer and a very high vacancy rate. The majority of retail and service units are independently owned and those national multiple comparison retailers that are present cater for the lower end of the market (charity shops and discount stores). The centre's environmental quality is extremely poor and does not provide for a pleasant shopping experience.

4.5.36 The centre primarily serves residents' convenience retail needs, with an Asda superstore and a range of smaller convenience stores catering for an ethnically diverse population. We suspect that there is a very low level of linked trips between the Asda store and the rest of the centre given how poor quality the retail/service offer is and the lack of connectivity between the two.

5 Current Retail and Leisure Expenditure Patterns

5.1 Introduction

5.1.1 In this section we utilise the results from the household telephone survey to identify the current patterns of comparison and convenience retail spending, as well as leisure spending, by residents across the defined study area.

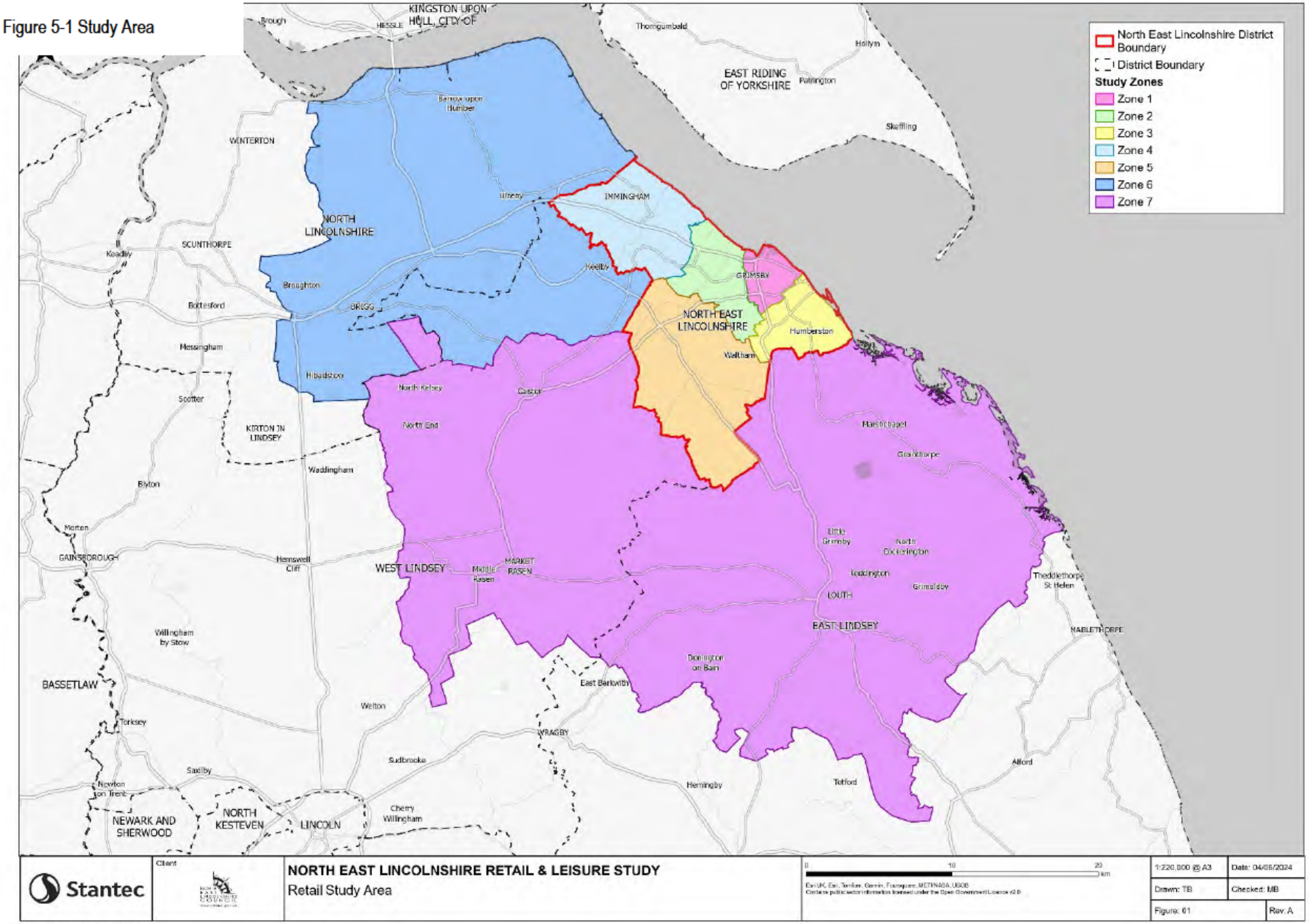
5.2 Household Survey Methodology

5.2.1 The last comprehensive Borough-wide survey of shopping and leisure patterns was undertaken in 2013, some eleven years ago, to inform the North East Lincolnshire Retail, Leisure and Three Centres Study, which was published in June 2013. A new household telephone survey has therefore been undertaken as part of this study – conducted during June and July 2024 – to provide up-to-date evidence of current shopping and leisure expenditure patterns.

5.3 Study Area

5.3.1 The study area used for this Retail and Leisure Study is shown on the plan within Appendix B of the Appendices Volume and in Figure 5-1 overleaf. The study area comprises seven study zones. North East Lincolnshire's administrative boundary coincides with the area covered by Study Zones 1 to 5. The remaining two study zones are wholly within neighbouring local authority areas (Zone 6 is in North Lincolnshire and Zone 7 is in West Lindsey and East Lindsey). The relatively extensive study area has been adopted to establish the role performed by Grimsby Town Centre and other centres within North East Lincolnshire both within the district and further afield. A total of 703 household survey interviews were achieved, with a minimum of 100 interviews achieved in each of the seven study area zones.

Figure 5-1 Study Area



Survey Questionnaire

5.3.2 The questionnaire used for the telephone household survey, which is reproduced within Appendix C of the Appendices Volume, sought to establish:

- Patterns of convenience goods spending, based on the location of:
  - the store where the household last undertook a main food and grocery shop, the store visited the time before that, the amount spent, and the frequency of visits for main food shopping;
  - the shop where the household last undertook a 'top-up' food and grocery shop, the shop visited the time before that, the amount spent, and the frequency of visits; and
  - spending on food and groceries in small shops and markets, and the frequency of visits.
- Patterns of comparison goods spending, based on the locations of the last purchase of:
  - clothes and shoes;
  - furniture, furnishings, carpets or other floor coverings, or household textiles;
  - DIY, decorating or gardening goods;
  - domestic appliances, such as washing machines, fridges, cookers, kettles or toasters;
  - electrical items, such as televisions, audio equipment, photographic equipment, mobile phones or tablets, or computer equipment;
  - recreational goods, such as toys and games, pets and pet products, books or stationery, sports equipment, bicycles or musical instruments; and
  - other non-food items, such as jewellery and watches, tableware and household utensils and other personal items such as travel goods.

5.4 Composite Patterns of Comparison Retail Goods Spending

5.4.1 The composite pattern of spending for comparison retail goods, as shown by Spreadsheet 4 within Appendix D, was achieved on the basis of expenditure data supplied by Experian. Table 5-1 below provides the weightings for each comparison retail category used to achieve the composite comparison figure.

Table 5-1 Composite Patterns of Comparison Goods Spend

Category	Percentage Weighting
Clothes and footwear	22.55
Furniture, floorcoverings, household textiles	15.73
Hardware, DIY	7.84
Domestic appliances	16.03
TV, AV, phones and computers	7.92
Recreational goods	17.77
Other non-food	12.16

5.4.2 The resident population of the study area in 2024, disaggregated by zone, is shown by the first row of figures in Spreadsheet 1 of Appendix D. The overall population in the 2024 base year amounts to 266,471 persons. Future year population projections to 2042 (also shown within Spreadsheet 1) are sourced from Experian Micromarketer App Library, which uses ONS-based data.

5.4.3 The per capita spend on comparison goods in 2024 (in 2022 prices) (Spreadsheet 2 of Appendix D) varies from a low of £3,178 in Zone 1 to a high of £4,347 in Zone 7. The total pot of comparison goods expenditure available to residents of the whole of the study area in 2024 is £981.7m (Spreadsheet 3 of Appendix D), of which £290.4m, or 29.6 per cent, is spent on special forms of trading (internet, catalogue and TV shopping, which we subsequently abbreviate as SFT), based on the findings of the household survey.

5.4.4 Spreadsheet 4 of Appendix D shows the market shares that each zone of the study area achieves in terms of the total spend on comparison retail goods by residents of each zone within the study area, and Spreadsheet 5 of Appendix D sets out the pattern of expenditure flows for the comparison retail goods sector as a whole, as revealed by the household survey.

5.4.5 Table 5-2, which is derived from the final two columns of Spreadsheet 5 of Appendix D, summarises the top five main destinations for comparison goods expenditure within the study area. Grimsby Town Centre is the dominant destination for comparison shopping within the study area, attracting £136.3m (19.8 per cent of total available expenditure) in the 2024 base year. The second most popular destination for comparison shopping within the study area – as revealed by the household survey – is Louth Town Centre, which attracts £78.5m, or 11.4 per cent. Additionally, High Point Retail Park and Victoria Retail Park, both located in Grimsby, cumulatively attract £91.9m (13.3 per cent) of the comparison retail expenditure available to study area residents.

5.4.6 Overall, some 83.1 per cent of comparison goods expenditure available to the study area's residents is spent within the study area, with 61.1 per cent accounted for by destinations within North East Lincolnshire itself, and destinations outside of North East Lincolnshire but still within the study area accounting for 22.0 per cent. This is known as the aggregate retention rate.

Table 5-2 Comparison Goods Expenditure Retained Within the Study Area in 2024

Destination	Expenditure (£m)	Expenditure (%)
Grimsby Town Centre	136.3	19.8
Louth Town Centre	78.5	11.4
High Point Retail Park, Grimsby	50.4	7.3
Victoria Retail Park, Grimsby	41.5	6.0
Other Retail Destinations in Study Zone 1	39.2	5.7
Total Retained Expenditure in North East Lincolnshire	**421.0**	**61.1**
Total Retained Expenditure in Study Area	**572.1**	**83.1**
Total Expenditure Leakage outside of the Study Area	**116.6**	**16.9**
Total	**688.7**	**100.0**

5.4.7 Table 5-2 confirms that 16.9 per cent or £116.6m of the comparison retail expenditure available to residents within the study area in 2024 'leaks' to destinations outside of the study area. The market shares and estimated comparison goods turnovers of the main centres and retail parks/freestanding stores outside of the study area are also set out in the last two columns of Spreadsheet 5 of Appendix D and are summarised in Table 5-3 below.

Table 5-3 Main Destinations for Comparison Goods Expenditure Leakage in 2024

Destinations outside the Study Area	Expenditure (£m)	Expenditure (%)
Lakeside Retail Park, Scunthorpe	12.3	1.8%
Lincoln City Centre	11.9	1.7%
Hull City Centre	11.3	1.6%
Scunthorpe Town Centre	6.4	0.9%
Scunthorpe Retail Park, Scunthorpe	6.1	0.9%
Meadowhall Shopping Centre, Sheffield	5.6	0.8%

5.4.8 The following destinations each account for £10m or more of comparison goods expenditure leakage: Lakeside Retail Park, Scunthorpe (£12.3m); Lincoln City Centre (£11.9m); and Hull City Centre (£11.3m), The remaining comparison goods expenditure leakage is accounted for by a combination of destinations including Scunthorpe Town Centre, Scunthorpe Retail Park and Meadowhall Shopping Centre in Sheffield.

Summary of influence within the Study Area

5.4.9 Spreadsheet 4 of Appendix D reveals that:

- Grimsby Town Centre, which enjoys the largest expenditure share, attracts more than 10 per cent of available comparison retail expenditure in all but one study zone:
  - Zone 1: 33.7 per cent
  - Zone 2: 32.5 per cent
  - Zone 3: 26.1 per cent
  - Zone 4: 18.1 per cent
  - Zone 5: 25.1 per cent
  - Zone 6: 2.5 per cent
  - Zone 7: 11.4 per cent
- High Point Retail Park attracts more than 10 per cent of available comparison retail expenditure in the following three zones:
  - Zone 1: 10.4 per cent
  - Zone 2: 12.0 per cent
  - Zone 4: 11.8 per cent
- Victoria Retail Park attracts more than 10 per cent of available comparison retail expenditure from only one zone:
  - Zone 4: 10.4 per cent
- Louth Town Centre also attracts more than 10 per cent from only one study zone:
  - Zone 7: 42.0 per cent
- Grimsby Town Centre clearly exerts a significant influence across a large part of the study area, but it does not attract the greatest proportion of comparison retail expenditure in all zones:
  - Barton-upon-Humber Town Centre is the dominant comparison retail destination in Zone 6 (14.1 per cent), ahead of Grimsby Town Centre which achieves a market share of only 2.5 per cent in this zone.

- Louth Town Centre is the dominant comparison retail destination in Zone 7 (42.0 per cent), ahead of Grimsby Town Centre, which achieves a market share of 11.4 per cent in this zone.

5.5 Composite Patterns of Convenience Retail Goods Spending

5.5.1 Per capita expenditure on convenience retail goods in 2024, based on Experian Micromarketer App Library data, varies across the study area from a low of £2,304 in Zone 1 to a high of £2,685 in Zone 7. The total amount of convenience goods expenditure available to residents of the whole study area in the 2024 base year is £662.7m (Spreadsheet 3 of Appendix E), of which only £0.2m is spent on SFT. The pattern of expenditure flows for the convenience goods sector as a whole, as revealed by the survey of households, is set out in Spreadsheets 4 and 5 of Appendix E.

5.5.2 Table 5-4 – which is derived from the final column of Spreadsheet 5 of Appendix E – reveals that, overall, some £414.8m of the expenditure on convenience retail goods available to residents of North East Lincolnshire is spent in the defined centres and freestanding stores which are located within the borough itself, and some £626.5m of the £662.5m of the convenience expenditure available within the study area is accounted for by facilities within the study area. The resultant aggregate retention rate in the study area is 94.6 per cent (see Spreadsheet 5, final two columns, 'Total Inside Study Area' row).

Table 5-4 Broad Destinations for Convenience Goods Expenditure

Destination	Expenditure (£m)	Expenditure (%)
Total retained expenditure within the Borough	414.8	62.6
Total retained expenditure within the Study Area	626.5	94.6
Total expenditure leakage	35.9	5.4
Total Expenditure	662.5	100.0

Main destinations for food and grocery shopping

5.5.3 Table 5-5 shows that the most popular destination for food and grocery shopping within the study area is Tesco Extra at Hewitts Circuit Retail Park in Cleethorpes, which has a survey-derived convenience retail goods turnover of around £75.9m, equating to a market share of 11.5 per cent. The next most popular destinations for convenience shopping within the study area are the Aldi on Newbridge Hill in Louth and Asda at Holles Street in Grimsby, with convenience retail turnovers of £44.5m and £44.0m, respectively, equating to market shares of 6.7 per cent and 6.6 per cent. Whilst the reminder of the foodstores identified in Table 5-5 have a relatively low share of total expenditure on convenience goods across the study area – of 5 per cent market share or below – the absolute value of that expenditure is high, with the lowest survey-derived turnover of the four foodstores being £15.5m.

Table 5-5 Main Destinations for Convenience Goods Expenditure Retained within the Study Area in 2024

Foodstores within the Study Area	Expenditure (£m)	Expenditure (%)
Tesco Extra, Hewitts Circus Retail Park, Cleethorpes	75.9	11.5
Aldi, Newbridge Hill, Louth	44.5	6.7
Asda, Holles Street, Grimsby	44.0	6.6
Morrisons Superstore, Eastgate, Louth	33.2	5.0
Morrisons Superstore, Hilmore Road, Laceby, Grimsby	31.1	4.7
Other shops in Study Zone 1	26.6	4.0
Aldi, Cleethorpe Road, Grimsby	25.2	3.8

5.5.1 There is a marginal 'leakage' of convenience goods expenditure to retail destinations outside the study area, cumulatively equating to a 5.4 per cent market share and with only one centre/store accounting for £5m or more of convenience goods expenditure leakage.

Table 5-6 Main Destinations for Convenience Goods Expenditure Leakage

Foodstores outside of the Study Area	Expenditure (£m)	Expenditure (%)
Morrisons Superstore, Lakeside Parkway, Scunthorpe	6.0	0.9
Other	29.9	4.5

5.5.2 The localised convenience goods retention rate – the proportion of expenditure on convenience retail goods available to residents in a specific zone which is spent in centres and stores located within that zone – is highest for Zones 1 and 6, each of which achieves a localised retention rate of over 70 per cent (see Spreadsheet 4 of Appendix E, and Table 5-7). Only one zone achieves a localised convenience goods retention of below 50 per cent, namely Zone 5 which has a localised retention rate of 39.8 per cent. That finding is perhaps not surprising given that Zone 5 contains only one large-format foodstore (Morrisons Superstore at Hilmore Road in Laceby, Grimsby).

Table 5-7 Localised Convenience Goods Retention Rates

Zone	Zonal retention rate (%)
1	78.2
2	32.6
3	57.4
4	64.9
5	39.8
6	74.0
7	71.5

Convenience Goods Market Shares

5.5.3 Table 5-8 shows, for each zone, the main convenience shopping destinations with a zonal market share of more than 10 per cent, and destinations with shares between 5 and 10 per cent. In summary, the survey findings confirm that most convenience shopping is undertaken on a highly localised basis.

Table 5-8 Convenience Goods Stores with Zonal Market Shares over 5 Per Cent

Zone	Expenditure (%) (greater than 10% market share)	Expenditure (%) (market share between 5% and 10%)
1	▪ Asda, Holles Street, Grimsby (23.3%) ▪ Aldi, Cleethorpe Road, Grimsby (13.9%) ▪ Other, Zone 1 (including shops at Freeman Street) (12.8%)	▪ Local shops in Grimsby Town Centre (8.5%) ▪ Lidl, Ladysmith Road, Grimsby (7.5%) ▪ Tesco Extra, Market Street, Grimsby (7.5%)
2	▪ Aldi, Magdalene Road, Grimsby (10.8%)	▪ Aldi, Matthew Telford Park, Grimsby (9.7%) ▪ Other, Zone 2 (7.5%)
3	▪ Tesco Extra, Hewitts Circus Retail Park (45.0%)	▪ Other, Zone 3 (9.9%)
4	▪ Aldi, Washdyke Lane, Immingham (38.5%) ▪ Tesco Superstore, Kennedy Way, Immingham (19.9%)	▪ Other, Zone 4 (6.5%)
5	▪ Morrisons Superstore, Hilmore Road, Laceby (30.7%)	▪ Co-Op Food, High Street, Waltham, Grimsby (5.0%)
6	▪ Tesco Superstore, Barnard Avenue, Brigg (17.1%) ▪ Tesco Superstore, Maltkiln Road, Barton-upon-Humber (12.4%) ▪ Local shops, Barton-upon-Humber Town Centre (10.4%)	▪ Lidl, Ferriby Road, Barton-upon-Humber (9.2%) ▪ Aldi, Bridge Street, Brigg (8.8%) ▪ Other, Zone 6 (8.6%)
7	▪ Aldi, Newbridge Hill, Louth (27.8%) ▪ Morrisons Superstore, Eastgate, Louth (20.8%)	▪ Local shops, Louth Town Centre (8.7%) ▪ Other, Zone 7 (8.2%)

5.6 Current Patterns of Spending on Leisure Services and Cultural Activities

5.6.1 As noted at the beginning of this section, the household survey questionnaire also sought to identify patterns of spending on various types of leisure and cultural services. The most popular destinations for these different activities for residents of each survey zone are set out in Table 5-9 and are outlined below in order to provide an insight into whether any centres within the study area have potentially greater roles to play in the provision of leisure and cultural services.

Table 5-9 Most Popular Destinations for Expenditure on Leisure Services and Culture

Zone	Restaurants	Pubs, bars, nightclubs and social clubs	Cinemas	Ten-Pin / Bingo / Casinos	Theatres / concerts / museums / art galleries & other cultural facilities	Indoor sports or health and fitness centres
1	Grimsby Town Centre	Grimsby Town Centre	Parkway Cinema, Kings Road, Cleethorpes	Cleethorpes Ten Pin Bowl, Kings Road, Cleethorpes	Hull New Theatre, Kingston Square, Hull	Cleethorpes Leisure Centre, Kingsway, Cleethorpes
2	Grimsby Town Centre	Grimsby Town Centre	Parkway Cinema, Kings Road, Cleethorpes	Cleethorpes Ten Pin Bowl, Kings Road, Cleethorpes	Grimsby Auditorium, Cromwell Road, Grimsby	Cleethorpes Leisure Centre, Kingsway, Cleethorpes
3	Cleethorpes Town Centre	Cleethorpes Town Centre	Parkway Cinema, Kings Road, Cleethorpes	Cleethorpes Ten Pin Bowl, Kings Road, Cleethorpes	Central London / West End	Cleethorpes Leisure Centre, Kingsway, Cleethorpes
4	Grimsby Town Centre	Healing Village Centre	Parkway Cinema, Kings Road, Cleethorpes	Cleethorpes Ten Pin Bowl, Kings Road, Cleethorpes	Central London / West End	Grimsby Leisure Centre, (Inspire), Cromwell Road, Grimsby
5	Cleethorpes Town Centre	Waltham Village Centre	Parkway Cinema, Kings Road, Cleethorpes	Cleethorpes Ten Pin Bowl, Kings Road, Cleethorpes	Central London / West End	The Gym Group, Victoria Retail Park, Victoria Street North, Grimsby, DN31 1PJ
6	Barton-upon-Humber Town Centre	Brigg Town Centre	Vue, Fenton Street, Scunthorpe	Cleethorpes Ten Pin Bowl, Kings Road, Cleethorpes	Central London / West End	Baysgarth Community Hub, Brigg Road, Barton-upon-Humber
7	Louth Town Centre	Louth Town Centre	Playhouse Cinema, Cannon Street, Louth	Cleethorpes Ten Pin Bowl, Kings Road, Cleethorpes	Lincoln City Centre	Meridian Leisure Centre, Wood Lane, Louth, LN11 8SA

Leisure Services and Cultural Activities Sub-Sectors

Restaurants

5.6.1 Almost two thirds (61.9 per cent) of all respondents answered that their household participates in restaurant visits. The most popular destinations for visits to restaurants are Cleethorpes Town Centre (18.0 per cent), Grimsby Town Centre (16.9 per cent) and Louth Town Centre (15.0 per cent).

Pubs, bars, nightclubs and social clubs

5.6.2 Almost half (51.6 per cent) of all respondents answered that their household visits pubs, bars, nightclubs and social clubs. The most popular destinations for visits to this category of leisure spend were Grimsby Town Centre (23.2 per cent), followed by Louth Town Centre (18.6 per cent) and Cleethorpes Town Centre (13.2 per cent).

Cinemas

5.6.3 Just under half (45.0 per cent) of all respondents answered that their household participates in cinema visits, with the most popular being Parkway Cinema, Kings Road, Cleethorpes (52.2 per cent), followed by Playhouse Cinema, Cannon Street, Louth (21.3 per cent) and then Odeon, Kingston Retail Park, Kingston Street, Hull (6.9 per cent).

Ten-Pin Bowling / Bingo / Casino

5.6.4 A fifth of all respondents (20.0 per cent) answered that their household visits ten-pin bowling venues. Of those that do, by far the most popular destination is Cleethorpes Ten Pin Bowl, Kings Road, Cleethorpes (63.1 per cent).

Theatres/concerts/museums/art galleries and other cultural facilities

5.6.5 Roughly one-third of all respondents (34.8 per cent) answered that their household participates in visits to cultural facilities such as art galleries, theatres, concerts or museums. The most popular destination for visits to a cultural facility was Central London / West End (14.9 per cent), followed by Hull New Theatre, Kingston Square (11.1 per cent) and Grimsby Auditorium, Cromwell Road, Grimsby (7.4 per cent).

Indoor sports or health and fitness centres

5.6.6 Just under a third (29.9 per cent) of all respondents answered that they visit indoor sports or health and fitness centres. The most popular destinations for this category of leisure pursuit were Cleethorpes Leisure Centre, Kingsway, Cleethorpes (17.6 per cent); Meridian Leisure Centre, Wood Lane, Louth (14.5 per cent); Grimsby Leisure Centre (Inspire), Cromwell Road, Grimsby (12.5 per cent); The Gym Group, Victoria Retail Park, Victoria Street North, Grimsby (7.2 per cent); and Bannatyne Health Club, Humberstone Avenue, Grimsby (6.3 per cent).

6 Assessment of Retail Needs

6.1 Introduction

6.1.1 Based on the retail spending patterns identified in the previous section, and forecasts of future population and retail expenditure growth, this section of the report provides the findings from our assessment of the quantitative need for additional retail floorspace over the study period. The section also outlines the findings from the qualitative questions that respondents were asked during the telephone household survey.

6.2 Quantitative Assessment

Methodology

6.2.1 The key inputs and assumptions that have been applied as part of our quantitative assessment of retail needs are explained below.

6.2.2 At the outset, we emphasise that capacity forecasts should, in line with national guidance, be subject to regular review throughout the plan period, in order to ensure an up-to-date evidence base which is based on accurate economic and market trends. Related to that general point, we advise that the longer-term quantitative forecasts identified by this assessment should be treated as indicative given the inherent uncertainties in respect of longer-term economic and demographic trends.

Population and Expenditure Growth

6.2.3 Spreadsheets 1, 2 and 3 within Appendices D and E set out details of predicted population and retail expenditure growth across the study area over the period to 2042. The population and expenditure figures are derived from Experian, and the former are based on ONS subnational population projections.

6.2.4 The population figures for the study area as a whole are presented below in Table 6-1, which shows that the study area is predicted to experience only modest population growth over the 18-year study period. The predicted population growth by 2042 is just 4,383 persons, vis-à-vis the 266,471 base population across the study area in 2024, which equates to a growth of 1.6 per cent.

Table 6-1 Summary of Population Growth

Year	Population	Population growth relative to 2024	Population growth relative to 2024 (%)
2024	266,471	-	-
2029	267,835	1,364	0.5
2034	268,907	2,436	0.9
2039	270,125	3,654	1.4
2042	270,854	4,383	1.6

6.2.5 The predicted population growth between 2024 and 2042, based on the ONS subnational population projections, is lower than the growth arising under preferred population Scenario F as set out within the draft Local Plan. The Scenario F figures only relate to North East Lincolnshire district, however, whereas the Experian based figures cover the study area as a whole, including areas outside of North East Lincolnshire district. It would not be advisable to simultaneously use the Scenario F population figures for the study zones within North East Lincolnshire, and the ONS based population data for the parts of the study area outside of North East Lincolnshire. Furthermore, the Scenario F figures are subject to change and, at the time of writing, the outcome of the Government's proposed revisions to the method for identifying annual housing requirements is awaited, which could have further consequential implications for population growth. For all of those reasons, and to avoid having an unwieldy number of population scenarios (and therefore numerous retail floorspace requirements), the appropriate and proportionate approach is the application of the Experian based population figures.

6.2.6 Table 6-2 provides a summary of overall levels of convenience retail goods spending growth across the study period. An allowance is made for special forms of trading ('SFT'), taken from Experian's Retail Planner Briefing Note 21 ('RPBN') of February 2024, with those figures adjusted to take account of SFT sales which rely on traditional floorspace such as 'click and collect' shopping. Expenditure on SFT is excluded from our assessment as it is not considered to be available to support the future development of retail floorspace. Figures are provided to one decimal place. Localised rates of SFT were captured by the household survey (see Spreadsheet 3 within Appendices D and E).

6.2.7 The localised rates vary for convenience and comparison goods. For convenience goods, the SFT market share identified by the household survey was just 0.02 per cent per cent across the study area. We have applied the market share identified by the household survey without making any further adjustments in the base year and have grown this market share over the study period according to the growth rates implied by Experian's forecasts of market shares for SFT (RPBN, Figure 5). Experian's SFT growth forecasts cover the period to 2040 and we have carried forward the 2040 SFT growth forecast into 2042.

Table 6-2 Convenience Goods Expenditure Growth Summary

Year	Convenience goods expenditure inc. SFT (£m)	SFT (£m)	Convenience goods expenditure exc. SFT (£m)
2024	662.7	0.2	662.5
2029	665.0	7.5	657.6
2034	671.3	12.3	659.0
2039	677.8	15.1	662.7
2042	681.7	16.1	665.6

6.2.8 Table 6-3 provides an equivalent summary for comparison goods expenditure. We have adopted a market share for SFT of 29.6 per cent in the base year of 2024 across the study area based on the findings of the household telephone survey. The high SFT market share is not unique to this particular study area; it reflects a more general shift in consumer preferences, which was accelerated by the COVID-19 pandemic.

6.2.9 The SFT market share figure has been grown over the study period, based on Experian's predicted levels of change in SFT's market shares (RPBN, Figure 5).

Table 6-3 Comparison Goods Expenditure Growth Summary

Year	Comparison goods expenditure inc. SFT (£m)	SFT (£m)	Comparison goods expenditure exc. SFT (£m)
2024	981.7	290.4	688.7
2029	1,036.3	345.6	687.1
2034	1,197.9	419.9	773.1
2039	1,386.3	501.2	878.9
2042	1,510.5	674.4	934.3

Retained Expenditure

6.2.10 The quantitative forecasts of retail need take account of the total amount of comparison and convenience goods expenditure which is retained within the study area. Table 6-4 sets out the total amount of expenditure retained within the study area in 2024.

Table 6-4 Summary of Retail Expenditure Retention in the Study Area at 2024 (excl. SFT)

Retail category	Available expenditure within study area (£m)	% of expenditure retained within study area	Expenditure retained within study area (£m)
Comparison goods	688.7	83.1	572.1
Convenience goods	662.5	94.6	626.5

6.2.11 In total, 83.1 per cent of study area residents' expenditure on comparison retail goods is currently retained within the study area, and 94.6 per cent of study area residents' expenditure on convenience retail goods is retained within the study area.

Claims on Expenditure

6.2.12 As set out in the previous section, spending on SFT (such as online shopping) has been removed from the expenditure forecasts. The total expenditure figures summarised above in Tables 6-2 to 6-3 make an allowance for this.

6.2.13 In addition to SFT, it is necessary to take into account commitments for new retail floorspace (schemes implemented but not yet trading at the time of the household survey, extant planning permissions which would result in additional retail floorspace, and planned development); and sales density growth (which is the expected growth in turnover of existing retailers within the study area).

Sales Density Growth

6.2.14 Sales density growth relates to the improved productivity or efficiency of retail floorspace over time. In assessing the amount of expenditure that is available to support the development of new retail floorspace, we make an allowance for sales density growth associated with existing retail floorspace within the study area. For comparison retail floorspace, we have assumed a 1.5 per cent retail sales density growth, which is informed by Figure 4b of Experian's RPBN. For convenience retail floorspace, no allowance is made for improving sales efficiency in existing stores due to very low forecasts of sales density growth.

Planning Commitments

6.2.15 The planning commitments – which were identified by the Council, supplemented by a planning history search – have been taken account of in the quantitative need assessment and are identified in Table 6-5 below.

Table 6-5 Retail Commitments

	Gross Retail Floorspace (sq.m)	Convenience Retail Sales Area Floorspace (sq.m)	Comparison Retail Sales Area Floorspace (sq.m)
Refurbishment and extension of the existing disused building at St James House, Grimsby	264	86	92
Partial demolition and redevelopment at Place Shopping Centre	1,782	579	623
Total	**2,046**	**665**	**716**

6.2.16 We estimate that the committed retail floorspace referred to above will generate a convenience goods turnover of £0.3 million in 2042, and a comparison goods turnover of £3.8 million in the same year. Further details of the assumptions applied in estimating the turnover of committed retail floorspace are contained within Spreadsheet 6 of Appendices D (comparison) and E (convenience).

Need for Convenience Retail Floorspace

6.2.17 Spreadsheet 7 of Appendix E provides our forecasts of convenience retail floorspace requirements arising within the study area. Floorspace requirements have been calculated to the end of the study period and for the interval years of 2024, 2029, 2034, 2039 and 2042. The spreadsheet is structured as set out below in Table 6-6, where we explain some of the other assumptions that we have applied in calculating the quantitative floorspace requirements.

Table 6-6 Methodology for Convenience Retail Assessment

Row	Explanation/Description
A&B	Total population and convenience retail expenditure available in the study area. These figures are taken from Spreadsheets 1 and 3.
C&D	Proportion of convenience retail goods expenditure which is retained within the study area (£m & %) based on the findings of the household telephone survey in 2024 (as detailed in Spreadsheet 5).
E&F	Assumed inflow of convenience retail expenditure to destinations within the study area from residents outside the study area.
G	Total convenience retail turnover of destinations within the study area (£m).
H	Residual growth in convenience retail expenditure (£m), which is calculated by deducting the baseline convenience retail turnover of existing stores within the study area from the total sum of available convenience retail expenditure and inflow.
I&J	Claims on residual growth in convenience retail expenditure including turnover from committed convenience retail floorspace. Commitments are

Row	Explanation/Description
	expected to be implemented and trading by 2029, and the total turnover figure from commitments is taken from Spreadsheet 6. A constant sales density was applied to both existing stores and committed convenience retail floorspace.
K	Total claims on expenditure (£m) in existing stores and committed convenience retail floorspace.
L	Final residual convenience retail expenditure (£m), calculated by deducting total claims on expenditure from residual growth in retained convenience goods expenditure.
M-0	Final residual convenience retail expenditure converted into floorspace requirements by applying an average convenience retail sales density of £4,798 per sq.m in 2024 (held constant throughout the study period). This produces a sales area floorspace requirement, which is converted to a gross convenience retail floorspace figure on the basis of an assumed net:gross floorspace ratio of 65:35.

6.2.18 Our findings in respect of quantitative need for convenience retail floorspace are summarised below in Table 6-7 (figures relate to sales area floorspace only).

Table 6-7 Summary of Convenience Retail Floorspace Requirements

Floorspace Requirement	2029	2034	2039	2042
Floorspace requirement (sales area floorspace sq.m)	-1,133	-815	-12	610
Floorspace requirement (gross sq.m)	-1,742	-1,254	-18	939

6.2.19 We have identified a very limited positive convenience retail floorspace requirement over the entire study period 2024 to 2042 of 610 sq.m (sales area). It is important to note, however, that the modest positive floorspace requirement only arises from 2039-40 onwards.

Need for Comparison Retail Floorspace

6.2.20 Spreadsheet 7 of Appendix E calculates requirements for comparison retail floorspace over the study period. Table 6-8 below explains the structure of our assessment, which is similar to the approach used for convenience retail floorspace, albeit the assumptions differ in terms of sales densities and net:gross floorspace ratios.

Table 6-8 Methodology for Comparison Retail Assessment

Row	Explanation/Description
A&B	Total population and comparison retail expenditure available in the study area. These figures are taken from Spreadsheets 1 and 3.
C&D	Proportion of comparison retail expenditure which is retained within the study area (£m & %) based on the findings of the household telephone survey in 2024 (as detailed in Spreadsheet 5).
E&F	Assumed inflow of comparison retail expenditure to destinations within the study area from residents outside the study area.
G	Total comparison retail turnover of destinations within the study area (£m).

Row	Explanation/Description
H	Residual growth in comparison retail expenditure (£m), which is calculated by deducting the baseline comparison retail turnover of existing stores within the study area from the total sum of available comparison retail expenditure and inflow.
I&J	Claims on residual growth in comparison retail expenditure including sales density growth in existing stores within the study area and turnover from committed comparison retail floorspace. Commitments are expected to be implemented and trading by 2029, and the total turnover figure is taken from Spreadsheet 6. An annual sales density growth rate of 1.5% is applied to both existing stores and committed comparison retail floorspace.
K	Total claims on expenditure (£m) from sales density growth in existing stores and committed comparison retail floorspace.
L	Final residual comparison retail expenditure (£m), calculated by deducting total claims on expenditure from residual growth in retained convenience goods expenditure.
M-0	Final residual comparison retail expenditure converted into floorspace requirements by applying an average comparison retail sales density of £7,489 per sq.m in 2024 (grown over the study period to allow for sales density growth). This produces a sales area floorspace requirement, which is converted to a gross comparison retail floorspace figure on the basis of an assumed net:gross floorspace ratio of 70:30.

6.2.21 Our findings in respect of quantitative need for comparison retail floorspace are summarised below in Table 6-9.

Table 6-9 Summary of Comparison Retail Floorspace Requirements

Floorspace Requirement	2029	2034	2039	2042
Floorspace requirement (sales area floorspace sq.m)	-13,796	-9,811	-5,615	-7,128
Floorspace requirement (gross sq.m)	-19,709	-14,015	-8,021	-10,182

6.2.22 We have identified a negative comparison retail floorspace requirement across the entire study period, which implies that there is a surplus of aggregate retail floorspace. However, we suspect that once the redevelopment of the western section of Freshney Place is finished and the new Community Diagnostics Centre and Onside Horizon Youth Zone open, Grimsby Town Centre will draw more visitors from further afield – including North Lincolnshire, West Lindsey and East Lindsey as well as locally – which could stimulate interest from additional retail operators.

Customer Views

6.2.23 In this section we set out the key responses from the telephone household survey undertaken by NEMS and consider whether they suggest a qualitative need for additional comparison and/or convenience retail provision in Grimsby Town Centre. Some of the household survey questions refer to both retail and leisure and so we have included both in this section. Figures are provided to one decimal place.

6.2.24 Respondents were asked *'How often do you usually visit Grimsby Town Centre for shopping purposes?'* More than a fifth (21.4 per cent) of respondents answered 'never visited' while

14.3 per cent answered 'once a week', 16.3 per cent stated 'once a month' and 10.0 per cent said '3 or 4 times a year'. 'Twice a year' was stated by 7.7 per cent of respondents, 5.2 per cent answered 'once a year' and 6.7 per cent said 'less often' (than once a year).

6.2.25 When asked *'How do you usually travel to Grimsby Town Centre for shopping purposes?'*, the majority (63.7 per cent) said by 'car / van – driver', with 11.4 per cent saying 'car / van – passenger'. The second most popular transport mode was by bus (11.9 per cent of the total responses), while 9.8 per cent of respondents answered that they visited Grimsby Town Centre by foot. Other modes of transport received only negligible shares of the responses, with 1.2 per cent citing cycling, 1 per cent answering by train, 0.6 per cent travelling by taxi and 0.2 per cent by other means such as disabled vehicles.

6.2.26 Respondents who visit Grimsby Town Centre at least once a year were asked what they liked most about Grimsby Town Centre. The overwhelming majority (43.9 per cent) said 'nothing', which is obviously an alarming result. The second most popular response was 'close to home' (7.5 per cent); followed by the 'good range of affordable shops' (6.5 per cent), 'good range of supermarkets (6.4 per cent), and 'good range of clothes shops' (3.7 per cent). Respondents were also asked what they liked least about Grimsby Town Centre. Approximately a quarter (23.9 per cent) said 'too many empty shops'. The second most popular answer was 'Shops - need more / better range of non-food shops generally' (17.3 per cent), followed by 'Shops - need more / better clothes shops' (9.3 per cent) and 'Dirty streets / poorly maintained (5.2 per cent).

7 Summary of Findings, and Recommendations

7.1 Introduction

7.1.1 In this concluding section we summarise the findings of the study and provide our recommendations for the formulation of future planning policy within North East Lincolnshire.

7.2 The Performance of North East Lincolnshire's Centres

7.2.1 In Section 4 of the report, we considered the performance of the three main town centres within North East Lincolnshire (Grimsby, Cleethorpes and Immingham) as well as Freeman Street District Centre. We summarise the findings in respect of the individual centres below and make recommendations on how each centre could be improved.

Grimsby Town Centre

7.2.2 While assessment against the various indicators suggests that Grimsby Town Centre is struggling, the centre is in a period of transition. We expect that the health of the town centre will noticeably improve upon the opening of the new cinema complex and market hall at the western end of Freshney Place. It is evident from the range of national multiple retailers present that Grimsby has a mid-range fashion offer with a noticeable lack of high-end retailers, aside from a small number at Abbeygate. There has been a substantial increase in the level of vacant floorspace across Grimsby Town Centre, which is nearly three times that recorded in 2013. Even after excluding the vacant units in Freshney Place, the vacancy rate is still significantly above the UK average for all centres given the exceptionally high level of unit vacancy that exists at present. With its independent shops and eateries, Abbeygate represents a welcome improvement to the town centre's offer.

7.2.3 We make the following recommendations in terms of Grimsby Town Centre:

- We welcome the works that are underway to transform the western section of Freshney Place into a new cinema, leisure and entertainment complex and to rehouse Grimsby Top Town Market in the former BHS unit. We consider that the redevelopment will make Grimsby Town Centre a more attractive option for national restaurant chains, which are lacking at present. Furthermore, the new Community Diagnostics Centre will broaden the town centre's offer.

- Reoccupation of the vacant units at Units 1-6 Riverhead would be welcome given that they are within close proximity of the primary shopping area (Freshney Place Shopping Centre) and are adjacent to Riverhead Square, where work is underway to transform the square into a new public space. Bringing these vacant units back into productive use would further enhance the area around Riverhead Square and reconnect the town centre to the waterfront.[39]

- The Council should also seek to bring the other vacant units across the town centre back into productive use. The Council could encourage 'meanwhile' uses in the town centre, which would support an active frontage approach and help to improve the centre's physical environment. Meanwhile spaces also allow for experimentation and, as they are not purpose-built, they often provide affordable space to occupiers who would typically be priced out. Whilst meanwhile uses would help to improve people's perceptions of Grimsby Town Centre, the Council should not lose sight of the overall aim of attracting long-term occupiers to vacant units.

[39] The Riverhead Square units, including Imperial House, were sold at auction in October 2024.

- We welcome the plans to build a new bus station/transport hub in the town centre and consider Osbourne Street to be an ideal location given its proximity to the railway station and good links to the primary shopping area.

- We welcome the proposals for St James' House and encourage the Council to find an occupier for the former Wilko unit. It would be beneficial to introduce an active frontage along this eastern boundary of St James' Square to increase levels of activity and amenity.

- Targeted shop front enhancement work and general public realm improvements would be welcome, particularly along Victoria Street West which is quite bleak at present and dominated by hard landscaping.

- To be successful, areas of Grimsby Town Centre that are struggling should be considered for uses other than large retail units occupied by national multiples, which are unlikely to return to the town centre. Successful high streets need to have a mix of independent shops, markets, well-known retail chains, leisure & entertainment, community facilities and key services.

- The Council could consider cladding the windows of town centre vacant units with reflective material to give the appearance of an active frontage. This does not address the root problem but helps to improve the town centre environment and visitors' perceptions especially in the light of the household survey finding that some respondents think the centre is poorly maintained and not attractive.

- The Council should not only direct its attention to those units which are already vacant but also concentrations of lower grade town centre uses and areas where there is risk of further occupier decline (such as Old Market Place). Proactively targeting such areas will help to limit the number of vacant units rising further.

7.2.4 We have reviewed the existing town centre boundary and primary shopping area for Grimsby Town Centre and consider that they remain appropriate. The existing town centre boundary accords with the definition of town centres included within the NPPF and is logical in that it includes three defensible boundaries, namely Frederick Ward Way, the railway line and the A16, beyond which is largely residential development. The town centre boundary extends northwards beyond Frederick Ward Way to include the West Craven Maltings buildings – which are being developed to create the Onside Horizon Youth Zone – and the brownfield land to the rear which is being developed for urban housing. A new footbridge was installed in 2021 to connect Frederick Ward Way and Fisherman's Wharf.

7.2.5 Whilst there is a concentration of vacant units in the western section of the Freshney Place Shopping Centre and in the area just outside (that is, the Bull Ring), we still consider the primary shopping area to be appropriate given that this vacant property will soon be transformed into a new cinema, leisure and entertainment complex and a new market hall bringing this area back into productive retail and leisure use.

Cleethorpes Town Centre

7.2.6 We consider Cleethorpes Town Centre to be performing reasonably well. The town centre serves the daily top-up needs of local residents as well as being a tourist destination for visitors. Cleethorpes has a greater proportion of independent retailers than national multiple retailers, but the latter is in line with the town centre's size and role. The town centre's convenience retail offer adequately caters for shoppers' daily top-up needs, it has a strong food and drink offer and the vacancy rate is below the UK average for all centres.

7.2.7 We make the following recommendations in terms of Cleethorpes Town Centre:

- We consider that wayfinding between the train station and the town centre could be greatly enhanced, which would improve visitors' perceptions of Cleethorpes upon arrival in the town.

- There is scope to improve the centre's tourism offer by modernising the amusements along the sea front as well as some of the retail/service units along Alexandra Road which cater for tourists.

- We concur with the 2013 Study that the centre's strong independent offer is a significant strength rather than any weakness or deficiency. We therefore consider that the Council should seek to maintain the town centre's current mix of uses rather than focusing on attracting additional national multiple retailers as this would effectively replicate national multiple retail provision in nearby Grimsby.

- Improving the attractiveness of shop frontages throughout the town centre would further distinguish Cleethorpes as a niche independent retail destination. Similarly, maintaining and enhancing the exterior of upper floor town centre units, particularly those along Alexandra Road which are beginning to look tired.

- Increasing the range of products sold at Cleethorpes' Outdoor Market and seeking to host more specialist markets (such as the Farmers' Market) would enhance the town's niche retail offer, and the visibility of the market could be improved via marketing and signage.

7.2.8 We have reviewed the town centre's currently defined boundary and the primary shopping area. Whilst Sea View Street appears somewhat detached from the main part of the town centre, we understand from Council officers that residents and visitors frequently pass through Cambridge Street and Alexandra Road to access the retail and service uses at Sea View Street, particularly the food and drink establishments.

7.2.9 The Council may want to consider including The Old Vic on Grant Street within the town centre boundary.

Immingham Town Centre

7.2.10 Immingham is a very unusual centre and is not really a town centre in the traditional sense. The shopping precinct is akin to a local centre catering for a very localised market, whereas the redeveloped part of the town centre is essentially a retail park, which is likely to attract people from a wider catchment.

7.2.11 The author of the previous study anticipated that the partial redevelopment would bring significant improvements in the performance of the town centre and enable Immingham to perform its town centre function within the retail hierarchy and adequately serve those residents within the north of the borough. We do not consider that to have been the case, however, given the significant number of vacant units within the traditional part of the centre, coupled with the poor physical environment.

7.2.12 We make the following recommendations in terms of Immingham Town Centre:

- The Council should seek to bring the vacant units back into productive use. This will increase consumer choice, improve the town centre environment, increase footfall and vibrancy and establish an active frontage.
- The physical environment needs to be markedly improved within the traditional part of the centre.
- A longer-term approach would be to redevelop the remaining part of the traditional centre.

Freeman Street District Centre

7.2.13 We consider Freeman Street to be an extremely unhealthy centre with a poor-quality comparison retail offer and exceptionally high vacancy rate. Those national multiple retailers that are present cater for the lower end of the market and the physical environment is bleak. An Asda superstore is located in the southern part of the centre and, whilst busy during our visit, we suspect that there is a very low level of linked trips with the rest of the centre given how poor quality the retail/service offer is.

7.2.14 There is limited scope to substantially improve the centre without large-scale intervention. Ordinarily, we would recommend that the Council should seek to bring the vacant units back into productive use; however, in the case of Freeman Street, where many of the unoccupied properties are derelict and/or in need of demolition, it is highly likely that most or all of them will remain vacant. The centre is dominated by hard landscaping and therefore the Council should introduce some soft landscaping measures to make the physical environment less hostile.

7.2.15 The Council should seek to maintain Freeman Street's new identity as a centre with a range of convenience retail outlets and specialist shops which cater for an ethnically diverse population. Attracting more community and cultural uses should be a priority given that the centre's retail focus has shifted, with Grimsby Town Centre being a more attractive option for national multiple retailers.

7.3 Retail Needs Arising Over the Study Period

7.3.1 We forecast that there is no requirement for additional comparison retail floorspace within the study area over the entire 2024-2042 study period. It is important to emphasise that the negative comparison retail floorspace 'requirement' relates to the entire study area, as opposed to Grimsby Town Centre only, or North East Lincolnshire Council's administrative area. That finding is a consequence of the claims on the expenditure growth (sales density growth in existing stores, and commitments) exceeding expenditure growth, leaving a negative residual. The result is a negative floorspace 'requirement' of approx. 7,000 sq.m sales area over the 2024-2042 study period, and at each interval (2029, 2034, 2039 and 2042). A negative 'requirement' means there is effectively a surplus of retail floorspace.

7.3.2 We identify a small requirement for 610 sq.m of additional convenience retail sales area floorspace across the study area over the period to 2042, all of which arises after 2039. It should be emphasised that this requirement covers a c.20-year study period and relates to the whole of the extensive study area.

7.3.3 Notwithstanding our findings set out above, we suspect that once the redevelopment of the western section of Freshney Place is finished and the new Community Diagnostics Centre and Onside Horizon Youth Zone open, Grimsby Town Centre will draw more visitors from further afield, including North Lincolnshire, West Lindsey and East Lindsey, as well as locally.

7.4 Recommendations for Future Planning Policy

7.4.1 We make the following recommendations regarding the proposed policy wording set out in the Draft Plan with Options document.

- Retail hierarchy – the Local Plan should facilitate improvement in the performance of the district's centres. Immingham Town Centre and Freeman Street District Centre should be particular areas of focus, given the various issues that we have identified in relation to the performance of those centres.

- Sequential Test and Retail Impact Assessment – we recommend changing the policy wording to read as follows, or similar:

  'A sequential approach will be applied to planning applications for main town centre uses. If there are no suitable sites within the town centres themselves then edge of centre locations should be considered next and, failing that, out of centre locations. Proposals for edge of centre and out of centre sites will only be acceptable where they are accessible and well-connected to the town centre.

  Planning permission will only be granted for retail and leisure proposals outside of the district's defined centres and comprising 300 sq.m gross floorspace or more (or 200 sq.m gross floorspace or more in local centres) if a retail impact assessment demonstrates that:

  - *there will be no adverse impact on town centre vitality and viability, including local consumer choice and trade in the town centre and wider retail catchment; and*

  - *there will be no adverse impact on existing, committed and planned public and private investment in any of the existing centres.'*

7.4.2 In our professional opinion, it is acceptable to take a differential approach to setting a locally set floorspace threshold which reflects the varying size and role of centres within the retail hierarchy. The threshold should, however, be lower for local centres given that they are more susceptible to adverse effects caused by out-of-centre development. We have therefore adjusted the figures within the Draft Plan with Options document so that the threshold for local centres is lower than that for the sub-regional centre, town centres and district centres.

7.5 Monitoring and Review

7.5.1 A number of indicators should be monitored by the Council to determine possible changes to retail floorspace requirements over the development plan period, which include:

- The implementation of existing retail commitments. Non-implementation of commitments or the expiry of existing planning permissions will slightly reduce the negative comparison floorspace 'requirement'.

- Expenditure growth rates reflect general economic conditions and therefore an acceleration in economic growth is likely to reduce the negative comparison floorspace 'requirement' as a result of increased expenditure growth rates. Conversely, any future economic downturn is likely to increase the negative comparison floorspace 'requirement' as a result of lower or negative expenditure growth rates.

- The market share of non-store retail sales (special forms of trading) has increased considerably over recent years, and this should be monitored carefully.

7.5.2 In addition to monitoring, we recommend that the Council should maintain an up-to-date picture of the performance of North East Lincolnshire's centres as well as any qualitative retail needs by continuing to review the composition of the centres and their vacancy rates.

7.5.3 Any sustained and significant changes in any of the key indicators should prompt a review and update of this assessment to ensure that the Council is meeting objectively assessed retail and leisure needs, encouraging sustainable shopping patterns and implementing the most appropriate strategy to support the vitality and viability of North East Lincolnshire's network of centres.

North East Lincolnshire Local Plan: Retail and Leisure Study

Appendices to Main Report

On behalf of **North East Lincolnshire Council**

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Appendices

Appendix A Goad Survey Data

Spreadsheet 1 - Grimsby Town Centre

Spreadsheet 2 - Cleethorpes Town Centre

Spreadsheet 3 - Immingham Town Centre

Spreadsheet 4 - Freeman Street District Centre

Spreadsheet 1 - Grimsby Town Centre Diversity of Uses

Goad Code	Operator Type	No. of Units				Floorspace			
		No. of units	% of Total	UK Average %	Index (UK=100)	Floorspace (sq.m)	% of Total	UK Average %	Index (UK=100)
	Number (and %) of Convenience Goods Outlets								
G1A	Bakers	5	1.55%	2.08%	74	640	0.83%	1.13%	73
G1B	Butchers	0	0.00%	0.64%	0	0	0.00%	0.35%	0
G1C	Greengrocers & fishmongers	1	0.31%	0.50%	62	4,260	5.51%	1.12%	492
G1D	Grocery and frozen foods	3	0.93%	2.96%	31	2,510	3.24%	13.10%	25
G1E	Off-licences and home brew	0	0.00%	0.46%	0	0	0.00%	0.28%	0
G1F	CTN & convenience	8	2.48%	3.57%	69	700	0.90%	3.04%	30
	TOTAL	**17**	**5.26%**	**10.21%**	**52**	**8,110**	**10.48%**	**19.02%**	**55**
	Number (and %) of Comparison Goods Outlets								
G2A	Footwear & repair	5	1.55%	1.23%	126	960	1.24%	1.00%	124
G2B	Men's & boys' wear	3	0.93%	0.59%	157	160	0.21%	0.44%	47
G2C	Women's, girls, children's clothing	9	2.79%	1.65%	169	1,780	2.30%	1.29%	178
G2D	Mixed and general clothing	12	3.72%	3.75%	99	6,020	7.78%	6.28%	124
G2E	Furniture, carpets & textiles	5	1.55%	2.75%	56	1,850	2.39%	3.13%	76
G2F	Booksellers, arts/crafts, stationers/copy bureaux	6	1.86%	3.02%	62	1,360	1.76%	2.48%	71
G2G	Electrical, home entertainment, telephones and video	8	2.48%	2.98%	83	1,130	1.46%	1.86%	79
G2H	DIY, hardware & household goods	4	1.24%	2.24%	55	5,380	6.95%	4.28%	162
G2I	Gifts, china, glass and leather goods	2	0.62%	1.60%	39	120	0.16%	0.85%	18
G2J	Cars, motorcycles & motor accessories	3	0.93%	0.99%	94	790	1.02%	1.64%	62
G2K	Chemists, toiletries & opticians	12	3.72%	3.77%	99	2,760	3.57%	3.87%	92
G2L	Variety, department & catalogue showrooms	3	0.93%	0.48%	193	1,930	2.49%	3.96%	63
G2M	Florists and gardens	0	0.00%	0.66%	0	0	0.00%	0.33%	0
G2N	Sports, toys, cycles and hobbies	7	2.17%	1.69%	128	1,640	2.12%	2.19%	97
G2O	Jewellers, clocks & repair	11	3.41%	1.66%	205	840	1.09%	0.83%	131
G2P	Charity shops, pets and other comparison	8	2.48%	4.34%	57	1,890	2.44%	3.37%	72
	TOTAL	**98**	**30.34%**	**33.40%**	**91**	**28,610**	**36.98%**	**37.80%**	**98**
	Number (and %) of Service Uses								
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	36	11.15%	18.97%	59	5,560	7.19%	13.74%	52
G3B	Hairdressers, beauty parlours & health centres	30	9.29%	13.50%	69	2,600	3.36%	6.72%	50
G3C	Laundries & drycleaners	0	0.00%	0.70%	0	0	0.00%	0.33%	0
G3D	Travel agents	6	1.86%	0.71%	262	620	0.80%	0.47%	170
G3E	Banks & financial services	15	4.64%	2.32%	200	3,350	4.33%	2.53%	171
G3F	Building societies	1	0.31%	0.42%	74	200	0.26%	0.36%	72
G3G	Estate agents & auctioneers	12	3.72%	3.30%	113	1,540	1.99%	1.88%	106
	TOTAL	**100**	**30.96%**	**39.92%**	**78**	**13,870**	**17.93%**	**26.03%**	**69**
	Number (and %) of Miscellaneous Uses								
G4A	Employment, careers, Post Offices and information	7	2.17%	0.97%	223	1,270	1.64%	0.65%	253
G4B	Vacant units	101	31.27%	15.47%	202	25,510	32.97%	16.52%	200
	TOTAL	**108**	**33.44%**	**16.44%**	**203**	**26,780**	**34.61%**	**17.17%**	**202**
	GRAND TOTAL	**323**	**100%**	**100%**		**77,370**	**100%**	**100%**	

Source: Experian GOAD (updated by Stantec May 2024)

Spreadsheet 2 - Cleethorpes Town Centre Diversity of Uses

Goad Code	Operator Type	No. of Units				Floorspace			
		No. of units	% of Total	UK Average %	Index (UK=100)	Floorspace (sq.m)	% of Total	UK Average %	Index (UK=100)
	Number (and %) of Convenience Goods Outlets								
G1A	Bakers	4	2.92%	2.08%	140	310	1.70%	1.13%	150
G1B	Butchers	1	0.73%	0.64%	114	160	0.88%	0.35%	250
G1C	Greengrocers & fishmongers	1	0.73%	0.50%	146	140	0.77%	1.12%	68
G1D	Grocery and frozen foods	2	1.46%	2.96%	49	400	2.19%	13.10%	17
G1E	Off-licences and home brew	1	0.73%	0.46%	159	70	0.38%	0.28%	137
G1F	CTN & convenience	8	5.84%	3.57%	164	1,310	7.17%	3.04%	236
	TOTAL	**17**	**12.41%**	**10.21%**	**122**	**2,390**	**13.09%**	**19.02%**	**69**
	Number (and %) of Comparison Goods Outlets								
G2A	Footwear & repair	1	0.73%	1.23%	59	40	0.22%	1.00%	22
G2B	Men's & boys' wear	1	0.73%	0.59%	124	100	0.55%	0.44%	124
G2C	Women's, girls, children's clothing	4	2.92%	1.65%	177	370	2.03%	1.29%	157
G2D	Mixed and general clothing	1	0.73%	3.75%	19	320	1.75%	6.28%	28
G2E	Furniture, carpets & textiles	1	0.73%	2.75%	27	110	0.60%	3.13%	19
G2F	Booksellers, arts/crafts, stationers/copy bureaux	3	2.19%	3.02%	73	390	2.14%	2.48%	86
G2G	Electrical, home entertainment, telephones and video	3	2.19%	2.98%	73	240	1.31%	1.86%	71
G2H	DIY, hardware & household goods	2	1.46%	2.24%	65	320	1.75%	4.28%	41
G2I	Gifts, china, glass and leather goods	3	2.19%	1.60%	137	290	1.59%	0.85%	187
G2J	Cars, motorcycles & motor accessories	1	0.73%	0.99%	74	240	1.31%	1.64%	80
G2K	Chemists, toiletries & opticians	5	3.65%	3.77%	97	1,130	6.19%	3.87%	160
G2L	Variety, department & catalogue showrooms	1	0.73%	0.48%	152	680	3.72%	3.96%	94
G2M	Florists and gardens	1	0.73%	0.66%	111	70	0.38%	0.33%	116
G2N	Sports, toys, cycles and hobbies	1	0.73%	1.69%	43	80	0.44%	2.19%	20
G2O	Jewellers, clocks & repair	2	1.46%	1.66%	88	200	1.10%	0.83%	132
G2P	Charity shops, pets and other comparison	6	4.38%	4.34%	101	950	5.20%	3.37%	154
	TOTAL	**36**	**26.28%**	**33.40%**	**79**	**5,530**	**30.28%**	**37.80%**	**80**
	Number (and %) of Service Uses								
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	40	29.20%	18.97%	154	5,300	29.03%	13.74%	211
G3B	Hairdressers, beauty parlours & health centres	16	11.68%	13.50%	87	1,490	8.16%	6.72%	121
G3C	Laundries & drycleaners	0	0.00%	0.70%	0	0	0.00%	0.33%	0
G3D	Travel agents	2	1.46%	0.71%	206	220	1.20%	0.47%	256
G3E	Banks & financial services	2	1.46%	2.32%	63	230	1.26%	2.53%	50
G3F	Building societies	2	1.46%	0.42%	348	260	1.42%	0.36%	396
G3G	Estate agents & auctioneers	3	2.19%	3.30%	66	510	2.79%	1.88%	149
	TOTAL	**65**	**47.45%**	**39.92%**	**119**	**8,010**	**43.87%**	**26.03%**	**169**
	Number (and %) of Miscellaneous Uses								
G4A	Employment, careers, Post Offices and information	1	0.73%	0.97%	75	130	0.71%	0.65%	110
G4B	Vacant units	18	13.14%	15.47%	85	2,200	12.05%	16.52%	73
	TOTAL	**19**	**13.87%**	**16.44%**	**84**	**2,330**	**12.76%**	**17.17%**	**74**
	GRAND TOTAL	**137**	**100%**	**100%**		**18,260**	**100%**	**100%**	

Source: Experian GOAD (updated by Stantec May 2024)

Spreadsheet 3 - Immingham Town Centre Diversity of Uses

Goad Code	Operator Type	No. of Units			
		No. of units	% of Total	UK Average %	Index (UK=100)
	Number (and %) of Convenience Goods Outlets				
G1A	Bakers	1	3.70%	2.08%	178
G1B	Butchers	1	3.70%	0.64%	579
G1C	Greengrocers & fishmongers	0	0.00%	0.50%	0
G1D	Grocery and frozen foods	4	14.81%	2.96%	501
G1E	Off-licences and home brew	0	0.00%	0.46%	0
G1F	CTN & convenience	0	0.00%	3.57%	0
	TOTAL	**6**	**22.22%**	**10.21%**	**218**
	Number (and %) of Comparison Goods Outlets				
G2A	Footwear & repair	0	0.00%	1.23%	0
G2B	Men's & boys' wear	0	0.00%	0.59%	0
G2C	Women's, girls, children's clothing	0	0.00%	1.65%	0
G2D	Mixed and general clothing	0	0.00%	3.75%	0
G2E	Furniture, carpets & textiles	0	0.00%	2.75%	0
G2F	Booksellers, arts/crafts, stationers/copy bureaux	1	3.70%	3.02%	123
G2G	Electrical, home entertainment, telephones and video	0	0.00%	2.98%	0
G2H	DIY, hardware & household goods	2	7.41%	2.24%	331
G2I	Gifts, china, glass and leather goods	0	0.00%	1.60%	0
G2J	Cars, motorcycles & motor accessories	0	0.00%	0.99%	0
G2K	Chemists, toiletries & opticians	2	7.41%	3.77%	196
G2L	Variety, department & catalogue showrooms	1	3.70%	0.48%	772
G2M	Florists and gardens	0	0.00%	0.66%	0
G2N	Sports, toys, cycles and hobbies	0	0.00%	1.69%	0
G2O	Jewellers, clocks & repair	0	0.00%	1.66%	0
G2P	Charity shops, pets and other comparison	1	3.70%	4.34%	85
	TOTAL	**7**	**25.93%**	**33.40%**	**78**
	Number (and %) of Service Uses				
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	3	11.11%	18.97%	59
G3B	Hairdressers, beauty parlours & health centres	2	7.41%	13.50%	55
G3C	Laundries & drycleaners	0	0.00%	0.70%	0
G3D	Travel agents	0	0.00%	0.71%	0
G3E	Banks & financial services	0	0.00%	2.32%	0
G3F	Building societies	0	0.00%	0.42%	0
G3G	Estate agents & auctioneers	1	3.70%	3.30%	112
	TOTAL	**6**	**22.22%**	**39.92%**	**56**
	Number (and %) of Miscellaneous Uses				
G4A	Employment, careers, Post Offices and information	0	0.00%	0.97%	0
G4B	Vacant units	8	29.63%	15.47%	192
	TOTAL	**8**	**29.63%**	**16.44%**	**180**
	GRAND TOTAL	**27**	**100%**	**100%**	

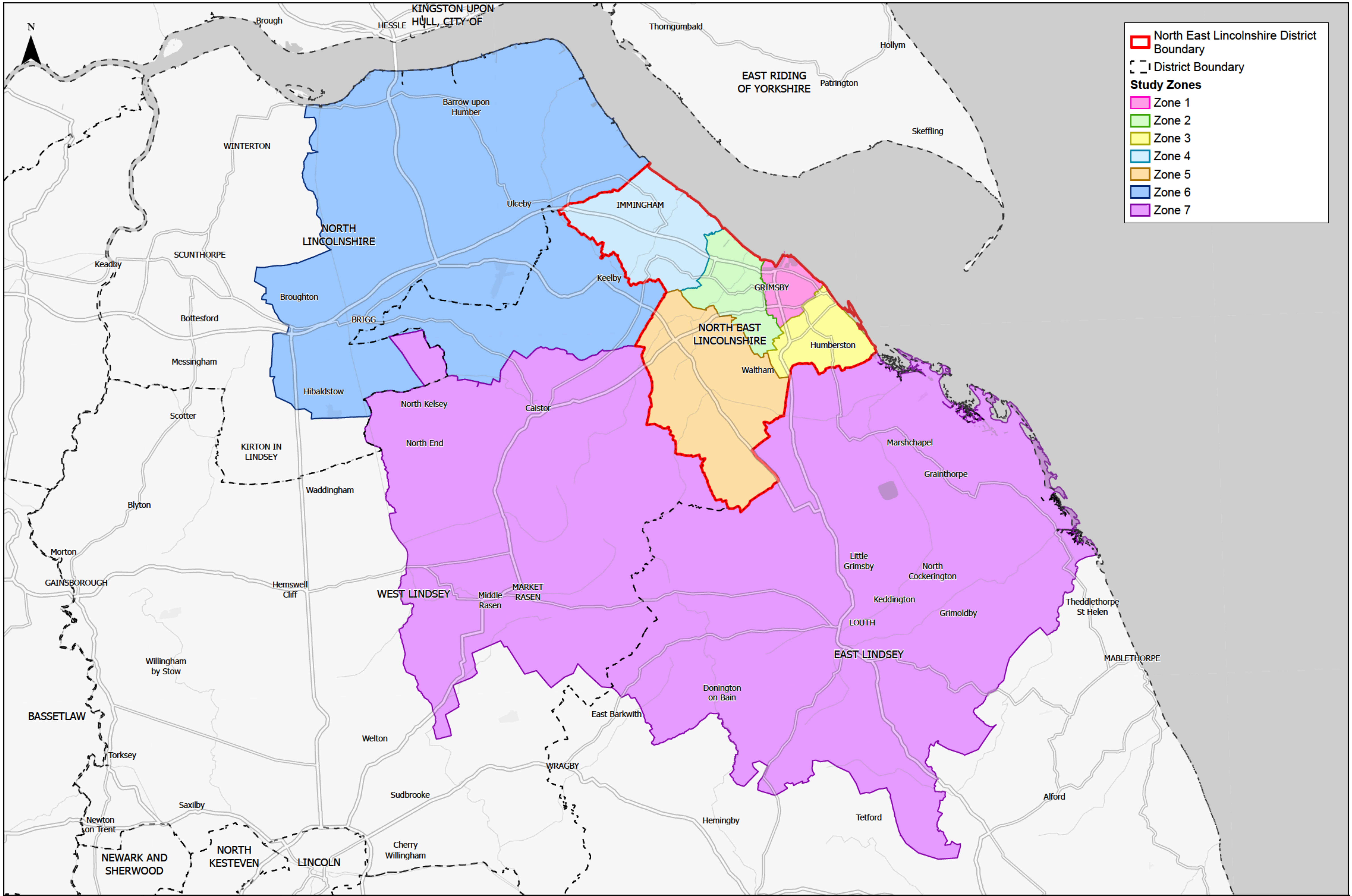
Source: Experian GOAD (updated by Stantec May 2024)

Spreadsheet 4 - Freeman Street District Centre Diversity of Uses

Goad Code	Operator Type	No. of Units				Floorspace			
		No. of units	% of Total	UK Average %	Index (UK=100)	Floorspace (sq.m)	% of Total	UK Average %	Index (UK=100)
	Number (and %) of Convenience Goods Outlets								
G1A	Bakers	2	0.84%	2.08%	40	420	0.70%	1.13%	62
G1B	Butchers	2	0.84%	0.64%	131	400	0.66%	0.35%	189
G1C	Greengrocers & fishmongers	1	0.42%	0.50%	84	3,860	6.39%	1.12%	571
G1D	Grocery and frozen foods	16	6.72%	2.96%	227	13,140	21.75%	13.10%	166
G1E	Off-licences and home brew	0	0.00%	0.46%	0	0	0.00%	0.28%	0
G1F	CTN & convenience	13	5.46%	3.57%	153	1,620	2.68%	3.04%	88
	TOTAL	**34**	**14.29%**	**10.21%**	**140**	**19,440**	**32.19%**	**19.02%**	**169**
	Number (and %) of Comparison Goods Outlets								
G2A	Footwear & repair	1	0.42%	1.23%	34	240	0.40%	1.00%	40
G2B	Men's & boys' wear	1	0.42%	0.59%	71	170	0.28%	0.44%	64
G2C	Women's, girls, children's clothing	1	0.42%	1.65%	25	140	0.23%	1.29%	18
G2D	Mixed and general clothing	2	0.84%	3.75%	22	100	0.17%	6.28%	3
G2E	Furniture, carpets & textiles	21	8.82%	2.75%	321	7,080	11.72%	3.13%	375
G2F	Booksellers, arts/crafts, stationers/copy bureaux	3	1.26%	3.02%	42	540	0.89%	2.48%	36
G2G	Electrical, home entertainment, telephones and video	8	3.36%	2.98%	113	1,360	2.25%	1.86%	121
G2H	DIY, hardware & household goods	9	3.78%	2.24%	169	4,070	6.74%	4.28%	157
G2I	Gifts, china, glass and leather goods	2	0.84%	1.60%	53	230	0.38%	0.85%	45
G2J	Cars, motorcycles & motor accessories	1	0.42%	0.99%	42	110	0.18%	1.64%	11
G2K	Chemists, toiletries & opticians	1	0.42%	3.77%	11	300	0.50%	3.87%	13
G2L	Variety, department & catalogue showrooms	2	0.84%	0.48%	175	1,600	2.65%	3.96%	67
G2M	Florists and gardens	1	0.42%	0.66%	64	280	0.46%	0.33%	140
G2N	Sports, toys, cycles and hobbies	5	2.10%	1.69%	124	380	0.63%	2.19%	29
G2O	Jewellers, clocks & repair	1	0.42%	1.66%	25	130	0.22%	0.83%	26
G2P	Charity shops, pets and other comparison	10	4.20%	4.34%	97	2,040	3.38%	3.37%	100
	TOTAL	**69**	**28.99%**	**33.40%**	**87**	**18,770**	**31.08%**	**37.80%**	**82**
	Number (and %) of Service Uses								
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	19	7.98%	18.97%	42	1,950	3.23%	13.74%	23
G3B	Hairdressers, beauty parlours & health centres	23	9.66%	13.50%	72	4,530	7.50%	6.72%	112
G3C	Laundries & drycleaners	0	0.00%	0.70%	0	0	0.00%	0.33%	0
G3D	Travel agents	1	0.42%	0.71%	59	90	0.15%	0.47%	32
G3E	Banks & financial services	3	1.26%	2.32%	54	820	1.36%	2.53%	54
G3F	Building societies	0	0.00%	0.42%	0	0	0.00%	0.36%	0
G3G	Estate agents & auctioneers	2	0.84%	3.30%	25	590	0.98%	1.88%	52
	TOTAL	**48**	**20.17%**	**39.92%**	**51**	**7,980**	**13.21%**	**26.03%**	**51**
	Number (and %) of Miscellaneous Uses								
G4A	Employment, careers, Post Offices and information	2	0.84%	0.97%	87	200	0.33%	0.65%	51
G4B	Vacant units	85	35.71%	15.47%	231	14,010	23.20%	16.52%	140
	TOTAL	**87**	**36.55%**	**16.44%**	**222**	**14,210**	**23.53%**	**17.17%**	**137**
	GRAND TOTAL	**238**	**100%**	**100%**		**60,400**	**100%**	**100%**	

Source: Experian GOAD (updated by Stantec May 2024)

Appendix B Study Area Plan



Stantec	Client	NORTH EAST LINCOLNSHIRE RETAIL & LEISURE STUDY Retail Study Area	Esri UK, Esri, TomTom, Garmin, Foursquare, METI/NASA, USGS Contains public sector information licensed under the Open Government Licence v2.0.	1:220,000 @ A3	Date: 04/06/2024
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Appendix C Household Survey Questionnaire

Job No. 042A24

North East Lincolnshire Household Survey

Good morning / afternoon / evening, I am …… from NEMS market research and we are conducting a short survey in your area for North East Lincolnshire Council about shopping and leisure activities. Do you have time to answer some questions ? It will take about five-six minutes.

QA **Are you the main, or joint main shopper in your household?**

Yes
No - Ask if main / joint main shopper is available. If not - close.

PC **Could you please provide your post code?**

RECORD POSTCODE

READ OUT: We now have a few questions about where you do food shopping. In answering these questions the location may be a store, a town, village or city, a specific road or area, or it could be the internet.

Q01 **Where did your household last undertake its main food shopping?**
DO NOT PROMPT. ONE ANSWER ONLY. IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#CONV	Food Shopping List	GO TO Q02
502	Internet / delivered (Established store e.g. Tesco, Asda, Sainsbury's)	GO TO Q01A
503	Internet / delivered (Other e.g. Ocado, Hello Fresh, Gousto, Amazon)	GO TO Q01A
504	Internet / Click and Collect	GO TO Q01A
505	(Don't know / can't remember)	**GO TO CLOSE**
506	(Don't do this type of shopping)	**GO TO CLOSE**

IF 'Internet / delivery' at Q01:

Q01A **How much did you spend on that occasion?**
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

X	PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)
Y	(Don't know / can't remember)
Z	(Refused)

Q02 **Where did you do a main food shop the time before that (was it the same, or different, and if so, please specify)?**
DO NOT PROMPT. ONE ANSWER ONLY. IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#CONV	Food Shopping List	GO TO Q03
502	Internet / delivered (Established store e.g. Tesco, Asda, Sainsbury's)	GO TO Q02A
503	Internet / delivered (Other e.g. Ocado, Hello Fresh, Gousto, Amazon)	GO TO Q02A
504	Internet / Click and Collect	GO TO Q02A
505	(Don't know / can't remember)	**GO TO Q04**
508	(Same place as before)	GO TO Q03

IF 'Internet / delivery' at Q02:

Q02A **How much did you spend on that occasion?**
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

X	PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)	GO TO Q04
Y	(Don't know / can't remember)	GO TO Q04
Z	(Refused)	GO TO Q04

Not those who said 'Internet / delivery' at Q01:

Q03 **How did you last travel to (STORE / LOCATION MENTIONED AT Q01) when main food shopping?**
DO NOT PROMPT. ONE ANSWER ONLY.

1	Car / van - driver
2	Car / van - passenger
3	Bus
4	Motorcycle, scooter or moped
5	Bicycle
6	Disabled vehicle (e.g. mobility scooter)
7	Taxi
8	Train
9	Walk
A	Other (PLEASE WRITE IN)
B	(Don't know / can't remember)

Q04 **Thinking more generally, how much does your household spend on average on main food shopping in a week?**
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

X	PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)
Y	(Don't know / varies)
Z	(Refused)

Q05	**And still thinking more generally, how often does your household do a main food shop?** DO NOT READ OUT. ONE ANSWER ONLY.	
1	7 times a week	
2	5 - 6 times a week	
3	3 - 4 times a week	
4	Twice a week	
5	Once a week	
6	Once every two weeks	
7	Once every three weeks	
8	Once a month	
9	Less often	
A	(Don't know / varies)	
	Not those who said 'Internet / delivery' at Q01:	
Q06	**When your household undertook its main food shopping at (STORE / LOCATION MENTIONED AT Q01), did it visit any other shops, services, or leisure facilities on the same shopping trip, i.e. did you do any other activities?** DO NOT READ OUT. CAN BE MULTICODED.	
1	Yes - **NON-FOOD** shopping	
2	Yes - other **FOOD** shopping	
3	Yes - visiting the market	
4	Yes - visiting the Post Office	
5	Yes - visiting financial service such as bank / building society etc.	
6	Yes - visiting health service such as doctor, dentist, hospital	
7	Yes - other service (e.g. hairdresser, travel agent, laundrette, estate agent, recycling, etc.)	
8	Yes - leisure activity (e.g. leisure centre, gym, cinema, park, etc)	
9	Yes - buying fuel	
A	Yes - travelling to / from school / college / university	
B	Yes - travelling to / from work	
C	Yes - going for a walk / walking the dog	
D	Yes - visiting church / place of worship	
E	Yes - visiting family / friends	
F	Yes - visiting library	
G	Yes - visiting pubs / bars / cafés / restaurants	
H	Yes - window shopping / browsing	
I	Yes - Other (PLEASE WRITE IN)	
J	No	
K	(Don't know / can't remember)	
Q07	**Where did your household last undertake its 'top-up' food shopping? (i.e smaller/ 'basket' shopping purchases which are not part of your main food and groceries shop)** DO NOT PROMPT. ONE ANSWER ONLY. IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.	
#CONV	Food Shopping List	GO TO Q08
502	Internet / delivered (Established store e.g. Tesco, Asda, Sainsbury's)	GO TO Q07A
503	Internet / delivered (Other e.g. Ocado, Hello Fresh, Gousto, Amazon)	GO TO Q07A
504	Internet / Click and Collect	GO TO Q07A
505	(Don't know / can't remember)	**GO TO Q09**
506	(Don't do this type of shopping)	**GO TO Q09**
	IF 'Internet / delivery' at Q07:	
Q07A	**How much did you spend on that occasion?** DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £	
X	PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)	
Y	(Don't know / can't remember)	
Z	(Refused)	
	Not those that said '(Don't do this type of shopping)' or '(Don't know / can't remember)' at Q07	
Q08	**And still thinking more generally, how often does your household do a top-up food shop?** DO NOT READ OUT. ONE ANSWER ONLY.	
1	7 times a week	
2	5 - 6 times a week	
3	3 - 4 times a week	
4	Twice a week	
5	Once a week	
6	Once every two weeks	
7	Once every three weeks	
8	Once a month	
9	Less often	
A	(Don't know / varies)	
Q09	**Where did your household last spend money on food and groceries in small shops, i.e. NOT supermarkets - for example, butchers, greengrocers, bakers, market, corner shops etc.?** DO NOT PROMPT. ONE ANSWER ONLY. IF THE STORE OR LOCATION IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.	
#SMALL	Small Shops List	GO TO Q10
505	(Don't know / can't remember)	**GO TO Q12**
506	(Don't do this type of shopping)	**GO TO Q12**

Not those that said '(Don't do this type of shopping)' or '(Don't know / can't remember)' at Q09

Q10 **Approximately how much money does your household spend PER WEEK on food and groceries in these small shops?**

PLEASE WRITE IN TO THE NEAREST £

X PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)
Y (Don't know / varies)
Z (Refused)

Not those that said '(Don't do this type of shopping)' or '(Don't know / can't remember)' at Q09

Q11 **And still thinking more generally, how often does your household spend money on food and groceries in small shops?**
DO NOT READ OUT. ONE ANSWER ONLY.

1 7 times a week
2 5 - 6 times a week
3 3 - 4 times a week
4 Twice a week
5 Once a week
6 Once every two weeks
7 Once every three weeks
8 Once a month
9 Less often
A (Don't know / varies)

READ OUT: We now have a few questions about where you undertake non-food shopping. In answering these questions the location may be a town centre, a retail park, a free standing store, or it could be facilities such as the internet, TV shopping or catalogue."

Q12 **Where did you or a member of your household last make a purchase of clothes, shoes or other fashion items?**
DO NOT PROMPT. ONE ANSWER ONLY. IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#COMP	Non Food List	GO TO Q13
502	Internet / delivered to home / workplace	GO TO Q12A
503	Internet / delivered to secure locker / pick-up	GO TO Q12A
504	Internet / Click and Collect	GO TO Q12A
505	(Don't know / can't remember)	**GO TO Q14**
506	(Don't do this type of shopping)	**GO TO Q14**

IF 'Internet / delivery' at Q12:

Q12A **How much did you spend on that occasion?**
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

X PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)
Y (Don't know / can't remember)
Z (Refused)

Not those that said '(Don't do this type of shopping)' or '(Don't know / can't remember)' at Q12

Q13 **How often does your household shop at (STORE / LOCATION MENTIONED AT Q12) for clothes or shoes shopping?**

DO NOT READ OUT. ONE ANSWER ONLY.

1 7 times a week
2 5 - 6 times a week
3 3 - 4 times a week
4 Twice a week
5 Once a week
6 Once every two weeks
7 Once every three weeks
8 Once a month
9 Once every two months
A 3 or 4 times a year
B Twice a year
C Once a year
D Less often
E (Don't know / varies)

Q14 **Where did you or a member of your household last make a purchase of furniture, furnishings, carpets or floor coverings, or household textiles?**
DO NOT PROMPT. ONE ANSWER ONLY. IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#COMP	Non Food List	GO TO Q15
502	Internet / delivered to home / workplace	GO TO Q14A
503	Internet / delivered to secure locker / pick-up	GO TO Q14A
504	Internet / Click and Collect	GO TO Q14A
505	(Don't know / can't remember)	GO TO Q15
506	(Don't do this type of shopping)	GO TO Q15

IF 'Internet / delivery' at Q14:

Q14A **How much did you spend on that occasion?**
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

X	PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)	
Y	(Don't know / can't remember)	
Z	(Refused)	

Q15 **Where did you or a member of your household last make a purchase of DIY goods, decorating supplies or products for the garden?**
DO NOT PROMPT. ONE ANSWER ONLY. IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#COMP	Non Food List	GO TO Q16
502	Internet / delivered to home / workplace	GO TO Q15A
503	Internet / delivered to secure locker / pick-up	GO TO Q15A
504	Internet / Click and Collect	GO TO Q15A
505	(Don't know / can't remember)	GO TO Q16
506	(Don't do this type of shopping)	GO TO Q16

IF 'Internet / delivery' at Q15:

Q15A **How much did you spend on that occasion?**
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

X	PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)	
Y	(Don't know / can't remember)	
Z	(Refused)	

Q16 **Where did you or a member of your household last make a purchase of domestic appliances, such as washing machines, fridges, cookers, kettles or toasters?**
DO NOT PROMPT. ONE ANSWER ONLY.
IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#COMP	Non Food List	GO TO Q17
502	Internet / delivered to home / workplace	GO TO Q16A
503	Internet / delivered to secure locker / pick-up	GO TO Q16A
504	Internet / Click and Collect	GO TO Q16A
505	(Don't know / can't remember)	GO TO Q17
506	(Don't do this type of shopping)	GO TO Q17

IF 'Internet / delivery' at Q16:

Q16A **How much did you spend on that occasion?**
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

X	PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)	
Y	(Don't know / can't remember)	
Z	(Refused)	

Q17 **Where did you or a member of your household last make a purchase of a television, audio equipment, photographic equipment, a mobile phone or tablet, or computer equipment?**
DO NOT PROMPT. ONE ANSWER ONLY.
IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#COMP	Non Food List	GO TO Q18
502	Internet / delivered to home / workplace	GO TO Q17A
503	Internet / delivered to secure locker / pick-up	GO TO Q17A
504	Internet / Click and Collect	GO TO Q17A
505	(Don't know / can't remember)	GO TO Q18
506	(Don't do this type of shopping)	GO TO Q18

IF 'Internet / delivery' at Q17:

Q17A **How much did you spend on that occasion?**
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

X	PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)	
Y	(Don't know / can't remember)	
Z	(Refused)	

Q18 **Where did you or a member of your household last make a purchase of general recreation items such as toys and games, pets and pets products, books or stationery, sports equipment, bicycles or musical instruments?**
DO NOT PROMPT. ONE ANSWER ONLY. IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#COMP	Non Food List	GO TO Q19
502	Internet / delivered to home / workplace	GO TO Q18A
503	Internet / delivered to secure locker / pick-up	GO TO Q18A
504	Internet / Click and Collect	GO TO Q18A
505	(Don't know / can't remember)	GO TO Q19
506	(Don't do this type of shopping)	GO TO Q19

IF 'Internet / delivery' at Q18:

Q18A **How much did you spend on that occasion?**
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

X	PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)	
Y	(Don't know / can't remember)	

Z	(Refused)	

Q19 **Where did you or a member of your household last make a purchase of other non-food items including chemist, health & beauty goods, jewellery and watches, china, tableware and household utensils and other personal items such as travel goods?**
DO NOT PROMPT. ONE ANSWER ONLY. IF THE STORE, LOCATION OR MARKET IS NOT ON LIST - PROBE FOR FULL ADDRESS DETAILS AND USE THE OTHER BOX TO RECORD THE INFORMATION.

#COMP	Non Food List	GO TO Q20
502	Internet / delivered to home / workplace	GO TO Q19A
503	Internet / delivered to secure locker / pick-up	GO TO Q19A
504	Internet / Click and Collect	GO TO Q19A
505	(Don't know / can't remember)	GO TO Q20
506	(Don't do this type of shopping)	GO TO Q20

IF 'Internet / delivery' at Q19:

Q19A **How much did you spend on that occasion?**
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

X	PLEASE RECORD AMOUNT SPENT £ (PLEASE WRITE IN)
Y	(Don't know / can't remember)
Z	(Refused)

READ OUT: I would now like to ask you some questions about your views on Grimsby Town Centre as a place for shopping, leisure activities, and using other services.

Q20 **How often do you usually visit Grimsby Town Centre for shopping purposes?**
DO NOT READ OUT. ONE ANSWER ONLY.

1	7 times a week	GO TO Q21
2	5 - 6 times a week	GO TO Q21
3	3 - 4 times a week	GO TO Q21
4	Twice a week	GO TO Q21
5	Once a week	GO TO Q21
6	Once every two weeks	GO TO Q21
7	Once every three weeks	GO TO Q21
8	Once a month	GO TO Q21
9	Once every two months	GO TO Q21
A	3 or 4 times a year	GO TO Q21
B	Twice a year	GO TO Q21
C	Once a year	GO TO Q21
D	Less often	**GO TO Q24**
E	(Don't know / varies)	**GO TO Q24**
F	(Never visited)	**GO TO Q24**

ASKED TO THOSE WHO HAVE VISITED GRIMSBY TOWN CENTRE AT LEAST ONCE A YEAR AT Q20

Q21 **How do you usually travel to Grimsby Town Centre for shopping purposes?**
DO NOT READ OUT. ONE ANSWER ONLY.

1	Car / van - driver
2	Car / van - passenger
3	Bus
4	Motorcycle, scooter or moped
5	Bicycle
6	Disabled vehicle (e.g. mobility scooter)
7	Taxi
8	Train
9	Walk
A	Other (PLEASE WRITE IN)
B	(Don't know / varies)

ASKED TO THOSE WHO HAVE VISITED GRIMSBY TOWN CENTRE ONCE A YEAR OR MORE AT Q20

Q22 **What do you like most about Grimsby Town Centre?**
DO NOT READ OUT. ONE ANSWER ONLY.

#LIKE Centre Like List

ASKED TO THOSE WHO HAVE VISITED GRIMSBY TOWN CENTRE ONCE A YEAR OR MORE AT Q20

Q23 **What do you like least about Grimsby Town Centre?**
DO NOT READ OUT. ONE ANSWER ONLY.

#DISLIKE Centre Dislike List

READ OUT: "We now have a few questions about a range of different social and leisure activities."

Q24 **Which of these leisure activities do you participate in?**
READ OUT. CAN BE MULTICODED.

1	Indoor sports or health and fitness activity, e.g. gyms, leisure centres, etc.	GO TO Q25
2	Restaurants	GO TO Q26
3	Pub / bars / nightclubs / social clubs	GO TO Q27
4	Theatres / concert halls / museums / art galleries and other cultural facilities	GO TO Q28
5	Cinema	GO TO Q29
6	Ten pin bowling / bingo / casino	GO TO Q30

7 (None mentioned) **GO TO GEN**

ASKED TO THOSE WHO PARTICIPATE IN HEALTH AND FITNESS OR LEISURE CENTRE ACTIVITIES AT Q24

Q25 **Which centre / facility did you last visit for an indoor sports or health and fitness activity?**
DO NOT PROMPT. ONE ANSWER ONLY.

#HEALTH Health List

ASKED TO THOSE WHO GO TO RESTAURANTS AT Q24

Q26 **Which centre / facility did you last visit to go to a restaurant?**
DO NOT PROMPT. ONE ANSWER ONLY.

#SOCIAL Social List

ASKED TO THOSE WHO GO TO PUB/BARS, NIGHTCLUBS OR A SOCIAL CLUBS AT Q24

Q27 **Which centre / facility did you last visit to go to pubs, bars and nightclubs?**
DO NOT PROMPT. ONE ANSWER ONLY.

#SOCIAL Social List

ASKED TO THOSE WHO VISIT THEATRE/CONCERT HALL/MUSEUM/ART GALLERIES AT Q24

Q28 **Which centre / facility did you last visit for theatres / concert halls / museums / art galleries and other cultural facilities**
DO NOT PROMPT. ONE ANSWER ONLY.

#CULTUR Culture list

ASKED TO THOSE WHO GO TO THE CINEMA AT Q24

Q29 **Which cinema did you last visit?**
DO NOT PROMPT. ONE ANSWER ONLY.

#CINEMA Cinema List

ASKED TO THOSE WHO GO TO TEN PIN BOWLING / BINGO / CASINO VENUES AT Q24

Q30 **Which ten-pin / bingo / casino bowling venue did you last visit?**
DO NOT PROMPT. ONE ANSWER ONLY.

#BOWL Bowling, Bingo & Casino List

GEN **Gender of respondent**
DO NOT READ OUT. CODE FROM OBSERVATION

1 Male
2 Female

AGE **Could I ask, how old are you?**
ONE ANSWER ONLY. DO NOT READ OUT.

1 18 to 24
2 25 to 34
3 35 to 44
4 45 to 54
5 55 to 64
6 65 +
7 (Refused)

Thank & Close

Appendix D Comparison Retail Capacity Spreadsheets

Spreadsheet 1 - Population Projections

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	All Zones Total
2024	41,128	56,250	34,013	15,019	11,283	49,259	59,519	266,471
2029	41,175	56,078	33,728	14,918	11,209	49,543	61,184	267,835
2034	41,411	55,974	33,264	14,866	11,070	49,683	62,639	268,907
2039	41,863	56,030	32,819	14,851	10,913	49,734	63,915	270,125
2042	42,134	56,146	32,586	14,868	10,811	49,666	64,643	270,854
Numeric change								
2024 - 2042	1,006	-104	-1,427	-151	-472	407	5,124	4,383
Percentage change (%)								
2024 - 2029	0.11%	-0.31%	-0.84%	-0.67%	-0.66%	0.58%	2.80%	0.51%
2029 - 2034	0.57%	-0.19%	-1.38%	-0.35%	-1.24%	0.28%	2.38%	0.40%
2034 - 2039	1.09%	0.10%	-1.34%	-0.10%	-1.42%	0.10%	2.04%	0.45%
2039 - 2042	0.65%	0.21%	-0.71%	0.11%	-0.93%	-0.14%	1.14%	0.27%
Total 2024 - 2042	2.4%	-0.2%	-4.2%	-1.0%	-4.2%	0.8%	8.6%	1.6%

Notes

1. Population data is derived from Experian Micromarketer App Library and based on ONS data.

Spreadsheet 2 - Comparison Goods Expenditure Per Capita (£)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
2024	3,178	3,321	3,609	3,549	4,068	3,726	4,347
2029	3,333	3,483	3,786	3,723	4,267	3,909	4,560
2034	3,834	4,007	4,354	4,282	4,909	4,496	5,246
2039	4,415	4,614	5,014	4,931	5,652	5,177	6,040
2042	4,796	5,012	5,447	5,357	6,140	5,624	6,562

Notes

1. The 2022-based per capita comparison expenditure data were sourced from Experian Micromarketer App Library.

2. The 2022-based per capita comparison expenditure data were rolled forward to the base year (2024) and forecast years using the forecasts contained within Experian Retail Planner Briefing Note 21 Figure 1a (February 2024)

All monetary values are held constant at 2022 prices

Spreadsheet 3 - Total Comparison Goods Expenditure and Expenditure Growth (£m)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	All Zones Total
Total expenditure in 2024	**130.69**	**186.79**	**122.74**	**53.30**	**45.90**	**183.53**	**258.74**	**981.68**
Adjusted SFT Market Share	30.5%	28.1%	28.8%	24.3%	19.4%	30.9%	33.5%	29.6%
Spending on SFT	39.89	52.53	35.33	12.93	8.90	56.63	86.80	290.37
Total expenditure excluding SFT in 2024	90.80	134.26	87.41	40.37	37.00	126.90	171.93	**688.67**
Total expenditure in 2029	**137.25**	**195.35**	**127.68**	**55.54**	**47.83**	**193.64**	**279.02**	**1,036.31**
Adjusted SFT Market Share	34.4%	31.7%	32.5%	27.4%	21.9%	34.8%	37.8%	33.4%
Spending on SFT	47.24	61.95	41.44	15.19	10.46	67.37	105.55	345.64
Total expenditure excluding SFT in 2029	90.02	133.40	86.24	40.35	37.37	126.27	173.47	**687.11**
Total expenditure in 2034	**158.79**	**224.29**	**144.85**	**63.66**	**54.34**	**223.38**	**328.59**	**1,197.89**
Adjusted SFT Market Share	36.2%	33.3%	34.1%	28.7%	23.0%	36.6%	39.8%	35.1%
Spending on SFT	57.44	74.76	49.41	18.30	12.49	81.69	130.65	419.94
Total expenditure excluding SFT in 2034	101.35	149.53	95.43	45.36	41.85	141.69	197.93	**773.14**
Total expenditure in 2039	**184.83**	**258.51**	**164.55**	**73.23**	**61.68**	**257.46**	**386.05**	**1,386.30**
Adjusted SFT Market Share	37.3%	34.4%	35.2%	29.6%	23.7%	37.7%	41.0%	36.2%
Spending on SFT	68.95	88.86	57.89	21.71	14.62	97.10	158.30	501.18
Total expenditure excluding SFT in 2039	115.88	169.65	106.66	51.52	47.06	160.37	227.75	**878.88**
Total expenditure in 2042	**202.09**	**281.42**	**177.49**	**79.64**	**66.38**	**279.32**	**424.17**	**1,510.51**
Adjusted SFT Market Share	38.9%	35.8%	36.6%	30.9%	24.7%	39.3%	42.7%	44.6%
Spending on SFT	78.53	100.76	65.04	24.60	16.39	109.73	181.18	674.39
Total expenditure excluding SFT in 2042	123.56	180.66	112.45	55.05	49.99	169.59	242.99	**934.29**
Growth in total expenditure 2024 - 2029	6.57	8.56	4.94	2.24	1.93	10.11	20.28	54.63
Growth in total expenditure 2029 - 2034	21.53	28.94	17.17	8.12	6.51	29.73	49.57	161.58
Growth in total expenditure 2034 - 2039	26.04	34.22	19.70	9.57	7.34	34.09	57.46	188.41
Growth in total expenditure 2039 - 2042	17.26	22.91	12.94	6.42	4.70	21.86	38.12	124.21
Growth in total expenditure 2024 - 2042	71.40	94.63	54.75	26.34	20.48	95.79	165.43	528.83

Notes

1. The figures in the above table are the product of multiplying the data presented in Spreadsheet 1 (population) by Spreadsheet 2 (per capita comparison goods expenditure) and are in millions of pounds (£m).

2. The total expenditure includes a proportion of expenditure on Special Forms of Trading (SFT) (e g. internet shopping). The proportion of expenditure on SFT in 2024 is derived from the telephone survey of households. For each of the forecast years, we have applied the rate of growth in adjusted SFT market shares implied by Experian's forecasts as outlined in Retail Planner Briefing Note 21 (February 2024) (Figure 5).

3. Adjusted SFT Market Share takes into account SFT sales that use traditional retail floorspace, such as Click and Collect.

All monetary values are held constant at 2022 prices.

Spreadsheet 4 - Comparison Goods Spending Patterns in 2024 as a Percentage across the Study Area Zones

Destination	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %
INSIDE STUDY AREA							
Zone 1							
Alexandra Retail Park, Alexandra Road, Grimsby, DN31 1SG	7.4%	3.8%	4.0%	12.3%	7.4%	0.7%	3.1%
Asda, Holles Street, Grimsby, DN32 9DL	6.4%	3.9%	2.2%	0.9%	0.2%	0.0%	0.6%
B&M, Victoria Street South, Grimsby, DN31 1NH	2.7%	1.7%	0.0%	0.0%	1.8%	0.0%	1.5%
B&Q, Peakes Parkway, Grimsby, DN32 9AW	5.0%	6.9%	6.2%	3.4%	4.8%	0.4%	1.4%
Grimsby Town Centre	33.7%	32.5%	26.1%	18.1%	25.1%	2.5%	11.4%
High Point Retail Park, Victoria Street North, Grimsby, DN31 1TY	10.4%	12.0%	9.7%	11.8%	9.5%	2.3%	2.9%
Sainsbury's Superstore, Corporation Road, Grimsby, DN31 1UF	2.6%	2.9%	0.9%	2.1%	2.2%	0.6%	0.8%
Victoria Retail Park, King Edward Street, Grimsby, DN31 1GB	8.6%	9.0%	4.3%	10.4%	8.2%	1.2%	5.2%
Other, Zone 1	10.0%	10.2%	7.9%	6.1%	6.1%	1.7%	1.5%
Total Zone 1	***86.8%***	***82.9%***	***61.2%***	***65.1%***	***65.4%***	***9.5%***	***28.5%***
Zone 2							
Other, Zone 2	2.5%	2.6%	0.4%	2.9%	1.4%	0.4%	0.0%
Total Zone 2	***2.5%***	***2.6%***	***0.4%***	***2.9%***	***1.4%***	***0.4%***	***0.0%***
Zone 3							
Cleethorpes Town Centre	1.8%	0.7%	6.3%	0.5%	3.3%	0.3%	0.0%
Hewitts Circus Retail Park, Hewitt's Avenue, Cleethorpes, DN35 9QR	0.6%	2.3%	8.1%	0.0%	1.6%	0.0%	0.0%
Tesco Extra, Hewitts Circus Retail Park, Hewitts Avenue, Humberston, Cleethorpes, DN35 9QR	1.4%	1.9%	4.6%	0.0%	4.2%	0.2%	0.8%
Other, Zone 3	1.0%	0.6%	4.7%	1.9%	1.7%	0.0%	0.7%
Total Zone 3	***4.7%***	***5.4%***	***23.6%***	***2.4%***	***10.8%***	***0.5%***	***1.5%***
Zone 4							
Home Bargains, Kennedy Way, Immingham, DN40 2AB	0.0%	0.0%	0.1%	3.4%	0.0%	0.3%	0.0%
Immingham Town Centre	0.0%	0.1%	0.0%	10.5%	0.7%	1.3%	0.0%
Other, Zone 4	0.0%	0.0%	0.0%	3.7%	0.1%	0.6%	0.0%
Total Zone 4	***0.0%***	***0.1%***	***0.1%***	***17.6%***	***0.8%***	***2.2%***	***0.0%***
Zone 5							
Morrisons Superstore, Hilmore Road, Laceby, Grimsby, DN37 7SQ	0.4%	1.0%	0.0%	0.3%	3.8%	0.1%	0.8%
Other, Zone 5	0.0%	0.5%	0.1%	0.1%	2.5%	0.3%	0.0%
Total Zone 5	***0.4%***	***1.5%***	***0.1%***	***0.5%***	***6.4%***	***0.5%***	***0.8%***
Zone 6							
Barton-upon-Humber Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	14.1%	0.0%
Brigg Town Centre	0.0%	0.0%	0.2%	0.1%	0.8%	11.5%	0.4%
Tesco Superstore, Maltkiln Road, Barton-upon-Humber, DN18 5JT	0.0%	0.0%	0.0%	0.2%	0.0%	5.2%	0.0%
Other, Zone 6	0.5%	0.4%	0.1%	1.8%	0.9%	6.6%	0.2%
Total Zone 6	***0.5%***	***0.4%***	***0.3%***	***2.1%***	***1.7%***	***37.4%***	***0.5%***
Zone 7							
B&Q, Fairfield Industrial Estate, Belvoir Way, Louth, LN11 0LQ	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%
Louth Town Centre	0.2%	0.0%	6.2%	0.4%	1.5%	0.0%	42.0%
Other, Zone 7	0.5%	0.0%	0.3%	0.1%	0.9%	0.2%	7.9%
Total Zone 7	***0.7%***	***0.0%***	***6.5%***	***0.4%***	***2.4%***	***0.2%***	***53.7%***
TOTAL INSIDE STUDY AREA	**95.6%**	**93.0%**	**92.3%**	**91.0%**	**88.7%**	**50.6%**	**84.9%**
Hull							
Hull City Centre	0.1%	0.5%	0.3%	0.3%	2.0%	7.4%	0.0%
St Andrews Quay Retail Park, Clive Sullivan Way, Hull, HU3 4SA	0.0%	0.0%	0.0%	0.4%	0.1%	3.6%	0.0%
Other, Hull	0.0%	0.0%	1.5%	0.9%	0.0%	5.0%	0.4%
Total Hull	***0.1%***	***0.5%***	***1.7%***	***1.5%***	***2.1%***	***16.1%***	***0.4%***
Lincoln							
Lincoln City Centre	0.0%	0.0%	0.0%	0.2%	0.6%	0.4%	6.5%
Other, Lincoln	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	3.5%
Total Lincoln	***0.0%***	***0.0%***	***0.0%***	***0.2%***	***0.7%***	***0.4%***	***10.0%***
Manchester							
Other, Manchester	0.0%	1.6%	0.3%	1.4%	0.0%	0.0%	0.0%
Total Manchester	***0.0%***	***1.6%***	***0.3%***	***1.4%***	***0.0%***	***0.0%***	***0.0%***
Sheffield							
Meadowhall Shopping Centre, Meadowhall, Sheffield, S9 1EP	1.3%	0.7%	0.6%	0.0%	0.8%	2.1%	0.0%
Other, Sheffield	0.1%	1.5%	0.0%	0.2%	0.6%	0.6%	1.8%
Total Sheffield	***1.4%***	***2.2%***	***0.6%***	***0.2%***	***1.3%***	***2.7%***	***1.8%***
Scunthorpe							
Gallagher Retail Park, Doncaster Road, Scunthorpe, DN15 8GR	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%
Lakeside Retail Park, Lakeside Parkway, Scunthorpe, DN16 3UU	0.1%	0.0%	0.0%	0.0%	0.0%	9.6%	0.0%
Fairacres Retail Park, Marcham Road, Abingdon, OX14 1BY	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Scunthorpe Retail Park, Holyrood Drive, Scunthorpe, DN15 8NL	0.0%	0.0%	0.0%	1.0%	0.0%	4.5%	0.0%
Scunthorpe Town Centre	0.0%	0.0%	0.0%	0.0%	0.1%	5.0%	0.0%
Other, Scunthorpe	0.8%	0.0%	0.0%	0.7%	0.0%	4.4%	0.2%
Total Scunthorpe	***0.9%***	***0.0%***	***0.0%***	***1.7%***	***0.1%***	***26.2%***	***0.2%***
Waltham							
Waltham Village Centre	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	0.0%
Other, Waltham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Waltham	***0.0%***	***0.0%***	***0.0%***	***0.0%***	***4.1%***	***0.0%***	***0.0%***
Other Outside Study Area							
Other, Outside Study Area	2.0%	2.7%	5.1%	4.0%	2.9%	4.1%	2.6%
Total Other Outside Study Area	***2.0%***	***2.7%***	***5.1%***	***4.0%***	***2.9%***	***4.1%***	***2.6%***
TOTAL OUTSIDE STUDY AREA	**4.4%**	**7.0%**	**7.7%**	**9.0%**	**11.3%**	**49.4%**	**15.1%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes

1. The comparison goods spending patterns are derived from the telephone household survey undertaken in June - July 2024

Spreadsheet 5 - Comparison Goods Spending Patterns in 2024 across the Study Area Zones

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total	All Zones Market Share
	90.8	134.3	87.4	40.4	37.0	126.9	171.9	688.7	
	£m	£m	£m	£m	£m	£m	£m	£m	%
INSIDE STUDY AREA									
Zone 1									
Alexandra Retail Park Alexandra Road Grimsby DN31 1SG	6.7	5.1	3.5	4.9	2.8	0.9	5.3	29.2	4.2%
Asda Holles Street Grimsby DN32 9DL	5.8	5.3	1.9	0.4	0.1	0.0	1.0	14.5	2.1%
B&M Victoria Street South Grimsby DN31 1NH	2.4	2.3	0.0	0.0	0.6	0.0	2.6	7.9	1.2%
B&Q Peakes Parkway Grimsby DN32 9AW	4.6	9.2	5.4	1.4	1.8	0.5	2.3	25.2	3.7%
Grimsby Town Centre	30.6	43.6	22.8	7.3	9.3	3.1	19.6	136.3	19.8%
High Point Retail Park Victoria Street North Grimsby DN31 1TY	9.5	16.1	8.5	4.8	3.5	2.9	5.1	50.4	7.3%
Sainsbury's Superstore Corporation Road Grimsby DN31 1UF	2.3	3.9	0.8	0.9	0.8	0.8	1.5	11.0	1.6%
Victoria Retail Park King Edward Street Grimsby DN31 1GB	7.8	12.1	3.7	4.2	3.0	1.5	9.0	41.5	6.0%
Other Zone 1	9.1	13.7	6.9	2.5	2.3	2.2	2.6	39.2	5.7%
Total Zone 1	***78.8***	***111.3***	***53.5***	***26.3***	***24.2***	***12.0***	***48.9***	***355.1***	***51.6%***
Zone 2									
Other Zone 2	2.3	3.4	0.4	1.2	0.5	0.4	0.0	8.2	1.2%
Total Zone 2	***2.3***	***3.4***	***0.4***	***1.2***	***0.5***	***0.4***	***0.0***	***8.2***	***1.2%***
Zone 3									
Cleethorpes Town Centre	1.6	0.9	5.5	0.2	1.2	0.3	0.0	9.7	1.4%
Hewitts Circus Retail Park Hewitt's Avenue Cleethorpes DN35 9QR	0.5	3.0	7.0	0.0	0.6	0.0	0.0	11.2	1.6%
Tesco Extra Hewitts Circus Retail Park Hewitts Avenue Humberston Cleethorpes DN35 9QR	1.2	2.6	4.1	0.0	1.6	0.3	1.3	11.0	1.6%
Other Zone 3	0.9	0.8	4.1	0.8	0.6	0.0	1.2	8.4	1.2%
Total Zone 3	***4.3***	***7.2***	***20.7***	***1.0***	***4.0***	***0.6***	***2.6***	***40.3***	***5.8%***
Zone 4									
Home Bargains Kennedy Way Immingham DN40 2AB	0.0	0.0	0.1	1.4	0.0	0.4	0.0	1.9	0.3%
Immingham Town Centre	0.0	0.1	0.0	4.3	0.3	1.7	0.0	6.4	0.9%
Other Zone 4	0.0	0.0	0.0	1.5	0.0	0.7	0.0	2.2	0.3%
Total Zone 4	***0.0***	***0.1***	***0.1***	***7.1***	***0.3***	***2.8***	***0.0***	***10.4***	***1.5%***
Zone 5									
Morrisons Superstore Hilmore Road Laceby Grimsby DN37 7SQ	0.3	1.4	0.0	0.1	1.4	0.2	1.3	4.8	*0.7%*
Other Zone 5	0.0	0.7	0.1	0.1	0.9	0.4	0.0	2.2	*0.3%*
Total Zone 5	***0.3***	***2.1***	***0.1***	***0.2***	***2.4***	***0.6***	***1.3***	***7.0***	***1.0%***
TOTAL NORTH EAST LINCOLNSHIRE	**85.7**	**124.2**	**74.7**	**35.7**	**31.3**	**16.5**	**52.8**	**421.0**	**61.1%**
Zone 6									
Barton-upon-Humber Town Centre	0.0	0.0	0.0	0.0	0.0	17.9	0.0	17.9	2.6%
Brigg Town Centre	0.0	0.0	0.2	0.0	0.3	14.6	0.7	15.8	2.3%
Tesco Superstore Maltkiln Road Barton-upon-Humber DN18 5JT	0.0	0.0	0.0	0.1	0.0	6.6	0.0	6.6	1.0%
Other Zone 6	0.5	0.6	0.1	0.7	0.3	8.4	0.3	10.8	1.6%
Total Zone 6	***0.5***	***0.6***	***0.3***	***0.8***	***0.6***	***47.4***	***0.9***	***51.2***	***7.4%***
Zone 7									
B&Q Fairfield Industrial Estate Belvoir Way Louth LN11 0LQ	0.0	0.0	0.0	0.0	0.0	0.0	6.5	6.5	0.9%
Louth Town Centre	0.2	0.0	5.4	0.1	0.6	0.0	72.2	78.5	11.4%
Other Zone 7	0.4	0.0	0.3	0.0	0.3	0.3	13.7	15.0	2.2%
Total Zone 7	***0.6***	***0.0***	***5.6***	***0.2***	***0.9***	***0.3***	***92.3***	***99.9***	***14.5%***
TOTAL INSIDE STUDY AREA	**86.8**	**124.8**	**80.6**	**36.7**	**32.8**	**64.2**	**146.1**	**572.1**	**83.1%**
Hull									
Hull City Centre	0.1	0.7	0.2	0.1	0.7	9.4	0.0	11.3	1.6%
St Andrews Quay Retail Park Clive Sullivan Way Hull HU3 4SA	0.0	0.0	0.0	0.2	0.0	4.6	0.0	4.8	0.7%
Other Hull	0.0	0.0	1.3	0.3	0.0	6.4	0.7	8.7	1.3%
Total Hull	***0.1***	***0.7***	***1.5***	***0.6***	***0.8***	***20.4***	***0.7***	***24.8***	***3.6%***
Lincoln									
Lincoln City Centre	0.0	0.0	0.0	0.1	0.2	0.5	11.1	11.9	1.7%
Other Lincoln	0.0	0.0	0.0	0.0	0.0	0.0	6.1	6.1	0.9%
Total Lincoln	***0.0***	***0.0***	***0.0***	***0.1***	***0.3***	***0.5***	***17.2***	***18.0***	***2.6%***
Manchester									
Other Manchester	0.0	2.1	0.2	0.5	0.0	0.0	0.0	2.9	0.4%
Total Manchester	***0.0***	***2.1***	***0.2***	***0.5***	***0.0***	***0.0***	***0.0***	***2.9***	***0.4%***
Sheffield									
Meadowhall Shopping Centre Meadowhall Sheffield S9 1EP	1.1	1.0	0.6	0.0	0.3	2.7	0.0	5.6	0.8%
Other Sheffield	0.1	2.0	0.0	0.1	0.2	0.7	3.1	6.2	0.9%
Total Sheffield	***1.2***	***3.0***	***0.6***	***0.1***	***0.5***	***3.4***	***3.1***	***11.8***	***1.7%***
Scunthorpe									
Gallagher Retail Park Doncaster Road Scunthorpe DN15 8GR	0.0	0.0	0.0	0.0	0.0	3.5	0.0	3.5	0.5%
Lakeside Retail Park Lakeside Parkway Scunthorpe DN16 3UU	0.1	0.0	0.0	0.0	0.0	12.2	0.0	12.3	1.8%
Fairacres Retail Park Marcham Road Abingdon OX14 1BY	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
Scunthorpe Retail Park Holyrood Drive Scunthorpe DN15 8NL	0.0	0.0	0.0	0.4	0.0	5.7	0.0	6.1	0.9%
Scunthorpe Town Centre	0.0	0.0	0.0	0.0	0.0	6.3	0.0	6.4	0.9%
Other Scunthorpe	0.7	0.0	0.0	0.3	0.0	5.5	0.4	7.0	1.0%
Total Scunthorpe	***0.8***	***0.0***	***0.0***	***0.7***	***0.0***	***33.2***	***0.4***	***35.2***	***5.1%***
Waltham									
Waltham Village Centre	0.0	0.0	0.0	0.0	1.5	0.0	0.0	1.5	0.2%
Other Waltham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
Total Waltham	***0.0***	***0.0***	***0.0***	***0.0***	***1.5***	***0.0***	***0.0***	***1.5***	***0.2%***
Other Outside Study Area									
Other Outside Study Area	1.8	3.6	4.5	1.6	1.1	5.2	4.5	22.3	3.2%
Total Other Outside Study Area	***1.8***	***3.6***	***4.5***	***1.6***	***1.1***	***5.2***	***4.5***	***22.3***	***3.2%***
TOTAL OUTSIDE STUDY AREA	**4.0**	**9.4**	**6.8**	**3.6**	**4.2**	**62.7**	**25.9**	**116.6**	**16.9%**
TOTAL	**90.8**	**134.3**	**87.4**	**40.4**	**37.0**	**126.9**	**171.9**	**688.7**	**100.0%**

Notes

1. The spend ng patte ns a e calculated by mult ply ng the total compa son goods expend tu e n 2024 (Sp eadsheet 3) by the ma ket sha e Sp eadsheet 4). The f gu es n the 'Total' column a e the sum of the expend tu e att acted to each cent e / sto e f om each zone.

2. The 'A l Zones Ma ket Sha e' s calculated by d v d ng the total expend tu e eta ned by each cent e / sto e by the total expend tu e n the study a ea.

Spreadsheet 6 - Comparison Retail Commitments

Application Proposal	Planning Application Ref. No.	Year of Opening	Comparison Retail Floorspace (sq. m)	Sales Area Floorspace (sq. m)	Sales Density in Opening Year (£ / sq. m)	Turnover from Study Area in Opening Year(£m)
Refurbishment and extension of the existing disused building at St James House, Grimsby	DM/0720/23/FUL	2025	132	92	7,489	0.5
Partially demolish and redevelop western element of Freshney Place shopping centre	DM/0979/22/FUL	2025	891	623	7,489	3.3
Sub-total	**-**		**1,023**	**716**	**-**	**3.8**

Notes

1. Retail floorspace area is taken from planning application material or based on Stantec estimate.
2. Sales density based on Stantec estimate to reflect the average of main comparison goods retailers and to reflect nature and location of proposed development.
3. Net floorspace calculated at a 70% figure of gross floorspace.
4. Where the type of retail provision was not specified a 50/50 ratio was used between comparison and convenience floorspace provision.
5. Where not specified a 2/3 ratio was used to determine proposed retail floorspace out of the total Use Class E floorspace.
6. Base Year (2024) sales density figures were applied to the sales density in Opening Year.

Spreadsheet 7 - Summary of Capacity for Comparison Goods Retail Floorspace (Constant Retention Rate)

	2024	2029	2034	2039	2042	Change between 2024 - 2042
Total Population and Expenditure						
A. Total study area population (persons)	266,471	267,835	268,907	270,125	270,854	4,383
B. Total comparison goods expenditure (excluding SFT) (£m)	688.7	687.1	773.1	878 9	934.3	245.6
Retained Expenditure						
C. Comparison goods expenditure retained in study area (%)	83.1%	83.1%	83.1%	83.1%	83.1%	
D. Comparison goods expenditure retained in study area (£m)	572.1	570.8	642.3	730.1	776.1	204.0
Inflow						
E. Inflow to study area at 10% (£m)	57.2	57.1	64.2	73.0	77.6	20.4
F. Growth in Inflow (£m)	0.0	-0.1	7.1	8 8	4.6	4.6
Total Turnover in Study Area						
G. Baseline comparison goods turnover of stores in study area (£m)	629.3	629.3	629.3	629 3	629.3	
Initial Surplus						
H. Growth in retained comparison goods expenditure (£m)	0.0	-58 6	20.1	109 6	151.4	151.4
Claims on Expenditure						
I. Sales density growth in existing stores (£m)	0.0	48.6	101.0	157.5	218.3	218.3
J. Turnover from commitments	3.8	4.0	4.4	4.7	5.1	1.3
K. Total claims on expenditure (£m)	3.8	52.7	105.4	162 2	223.3	219.6
L. Residual expenditure (£m)	-3.8	-111.3	-85.3	-52.6	-71.9	
Comparison Retail Floorspace Requirements (8)						
M. Assumed sales density (£/sq.m)	7,489	8,068	8,691	9,363	10,087	2,598
N. Floorspace requirement (sales area floorspace sq.m)	-501	-13,796	-9,811	-5,615	-7,128	-6,627
O. Floorspace requirement (gross sq.m)	-716	-19,709	-14,015	-8,021	-10,182	-9,467

Notes

1. Total population of the study area taken from Spreadsheet 1. Total comparison goods expenditure (excluding SFT) taken from Spreadsheet 3.

2. Retained expenditure - proportion of all comparison goods expenditure spent at retail facilities within the study area, taken from Spreadsheet 5. This is held constant throughout the assessment period.

3. Inflow - additional comparison goods expenditure drawn to retail facilities within the study area from residents outside the study area. Assumed to be 10% of retained expenditure in the study area.

4. Total comparison goods turnover of stores within study area in the base year taken from Spreadsheet 5.

5. Initial surplus - total growth in retained comparison goods expenditure before claims on expenditure.

6. Claims on expenditure - the turnover of commitments for new comparison retail floorspace in the study area taken from Spreadsheet 6. An allowance for growth in the turnover of both existing stores and committed comparison retail floorspace based on the assumption that sales densities will grow by an average of 1.5% per annum throughout the study period.

7. Residual expenditure - the product of deducting claims on expenditure from the initial surplus.

8. Comparison retail floorspace requirements calculated by converting the residual expenditure using a sales density estimate of £ 7489 / sq.m in 2024 , increased anticipated sales density growth as outlined in Figure 4b of the Experian Retail Planner Note 21 (February 2024).

9. 70 % net to gross ratio assumed.

10. All monetary figures are rounded to one decimal place and all floorspace figures are rounded to the nearest square metre.

All monetary values are held constant at 2022 prices.

Appendix E Convenience Retail Capacity Spreadsheets

Spreadsheet 1 - Population Projections

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	All Zones Total
2024	41,128	56,250	34,013	15,019	11,283	49,259	59,519	266,471
2029	41,175	56,078	33,728	14,918	11,209	49,543	61,184	267,835
2034	41,411	55,974	33,264	14,866	11,070	49,683	62,639	268,907
2039	41,863	56,030	32,819	14,851	10,913	49,734	63,915	270,125
2042	42,134	56,146	32,586	14,868	10,811	49,666	64,643	270,854
Numeric change								
2024 - 2042	1,006	-104	-1,427	-151	-472	407	5,124	4,383
Percentage change (%)								
2024 - 2029	0.11%	-0.31%	-0.84%	-0.67%	-0.66%	0.58%	2.80%	0.51%
2029 - 2034	0.57%	-0.19%	-1.38%	-0.35%	-1.24%	0.28%	2.38%	0.40%
2034 - 2039	1.09%	0.10%	-1.34%	-0.10%	-1.42%	0.10%	2.04%	0.45%
2039 - 2042	0.65%	0.21%	-0.71%	0.11%	-0.93%	-0.14%	1.14%	0.27%
Total 2024 - 2042	2.4%	-0.2%	-4.2%	-1.0%	-4.2%	0.8%	8.6%	1.6%

Notes

1. Population data is derived from Experian Micromarketer App Library

Spreadsheet 2 - Convenience Goods Expenditure Per Capita (£)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
2023	2,304	2,348	2,529	2,382	2,681	2,517	2,685
2028	2,299	2,343	2,524	2,377	2,675	2,512	2,680
2033	2,311	2,355	2,537	2,389	2,689	2,525	2,693
2038	2,322	2,366	2,550	2,401	2,702	2,537	2,707
2041	2,329	2,373	2,557	2,408	2,710	2,545	2,715

Notes

1. The 2022-based per capita convenience expenditure data were sourced from Experian Micromarketer App Library.

2. The 2022-based per capita convenience expenditure data were rolled forward to the base year (2024) and forecast years using the forecasts contained within Experian Retail Planner Briefing Note 21 (February 2024) Figure 1a

All monetary values are held constant at 2022 prices

Spreadsheet 3 - Total Convenience Goods Expenditure and Expenditure Growth (£m)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	All Zones Total
Total expenditure in 2024	**94.74**	**132.05**	**86.03**	**35.77**	**30.25**	**123.99**	**159.82**	**662.66**
Adjusted SFT Market share	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Spending on SFT	0.00	0.00	0.18	0.00	0.00	0.00	0.00	0.17
Total expenditure excluding SFT in 2024	94.74	132.05	85.86	35.77	30.25	123.99	159.82	**662.49**
Total expenditure in 2029	**94.66**	**131.38**	**85.14**	**35.46**	**29.99**	**124.46**	**163.97**	**665.06**
Adjusted SFT Market share	1.1%	1.1%	1.3%	1.1%	1.1%	1.1%	1.1%	1.1%
Spending on SFT	1.04	1.45	1.11	0.39	0.33	1.37	1.80	7.49
Total expenditure excluding SFT in 2029	93.62	129.94	84.03	35.07	29.66	123.09	162.16	**657.57**
Total expenditure in 2034	**95.68**	**131.79**	**84.39**	**35.51**	**29.76**	**125.44**	**168.71**	**671.29**
Adjusted SFT Market share	1.8%	1.8%	2.0%	1.8%	1.8%	1.8%	1.8%	1.8%
Spending on SFT	1.72	2.37	1.69	0.64	0.54	2.26	3.04	12.26
Total expenditure excluding SFT in 2034	93.96	129.42	82.70	34.87	29.23	123.18	165.67	**659.03**
Total expenditure in 2039	**97.21**	**132.59**	**83.68**	**35.65**	**29.49**	**126.19**	**173.00**	**677.82**
Adjusted SFT Market share	2.2%	2.2%	2.4%	2.2%	2.2%	2.2%	2.2%	2.2%
Spending on SFT	2.14	2.92	2.01	0.78	0.65	2.78	3.81	15.09
Total expenditure excluding SFT in 2039	95.07	129.67	81.67	34.87	28.84	123.42	169.20	**662.74**
Total expenditure in 2042	**98.13**	**133.26**	**83.34**	**35.80**	**29.30**	**126.40**	**175.50**	**681.74**
* SFT Market share	2.3%	2.3%	2.5%	2.3%	2.3%	2.3%	2.3%	2.4%
Spending on SFT	2.30	3.12	2.12	0.84	0.69	2.96	4.11	16.14
Total expenditure excluding SFT in 2042	95.84	130.14	81.21	34.96	28.62	123.44	171.39	**665.61**
Growth in total expenditure 2024 - 2029	-0.08	-0.67	-0.89	-0.31	-0.26	0.47	4.14	**2.40**
Growth in total expenditure 2029 - 2034	1.02	0.41	-0.75	0.05	-0.22	0.98	4.74	**6.23**
Growth in total expenditure 2034 - 2039	1.53	0.79	-0.71	0.14	-0.28	0.76	4.30	**6.53**
Growth in total expenditure 2039 - 2042	0.92	0.67	-0.34	0.15	-0.19	0.21	2.50	**3.91**
Growth in total expenditure 2024 - 2042	3.39	1.21	-2.70	0.03	-0.95	2.41	15.68	**19.07**

Notes

1. The figures in the above table are the product of multiplying the data presented in Spreadsheet 1 (population) by Spreadsheet 2 (per capita convenience goods expenditure) and are in millions of pounds (£m).

2. The total expenditure includes a proportion of expenditure on Special Forms of Trading (SFT) (e g. internet shopping). The proportion of expenditure on SFT in 2024 is derived from the telephone survey of households. For each of the forecast years, we have applied the rate of growth in adjusted SFT market shares implied by Experian's forecasts as outlined in Retail Planner Briefing Note 21 (February 2024) (Figure 5).

3. Adjusted SFT Market Share takes into account SFT sales that use traditional retail floorspace, such as Click and Collect.

4. SFT growth rates was calculated using Experian's SFT market share forecast percentage points growth added to the SFT market share deducted from the household survey.

5. All monetary values are held constant at 2022 prices.

Spreadsheet 4 - Convenience Goods Spending Patterns in 2024 as a Percentage across the Study Area Zones

Destination	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %
INSIDE STUDY AREA							
Zone 1							
Aldi, Cleethorpe Road, Grimsby, DN31 3BH	13.9%	3.9%	6.4%	0.0%	0.0%	1.2%	0.0%
Asda, Holles Street, Grimsby, DN32 9DL	23.3%	8.8%	3.6%	3.7%	7.8%	0.0%	2.3%
Iceland, Alexandra Retail Park, Alexandra Road, Grimsby, DN31 1SG	0.0%	2.2%	0.0%	0.0%	0.3%	0.0%	1.9%
Lidl, Ladysmith Road, Grimsby, DN32 9SW	7.5%	1.3%	3.6%	0.2%	1.0%	0.0%	0.6%
Local shops, Grimsby Town Centre	8.5%	8.1%	1.7%	3.3%	1.4%	0.3%	0.5%
Morrisons Daily, Grimsby Road, Cleethorpes, DN35 7HB	0.2%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Superstore, Corporation Road, Grimsby, DN31 1UF	4.6%	7.7%	4.3%	2.9%	5.8%	0.0%	1.0%
Tesco Extra, Market Street, Grimsby, DN31 1PG	7.5%	3.3%	1.3%	8.7%	2.1%	0.4%	4.2%
Other, Zone 1	12.8%	7.1%	4.3%	0.1%	0.8%	0.0%	0.7%
Total Zone 1	***78.2%***	***42.3%***	***28.7%***	***18.9%***	***19.2%***	***1.9%***	***11.2%***
Zone 2							
Aldi, Magdalene Road, off Cambridge Road, Grimsby, DN34 5DN	3.1%	10.8%	1.3%	1.1%	7.7%	0.0%	1.0%
Aldi, Matthew Telford Park, Scartho Top, Grimsby, DN33 3ER	0.7%	9.7%	7.0%	2.9%	7.5%	0.0%	0.6%
Lidl, Cromwell Road, Grimsby, DN31 2BB	1.4%	4.5%	0.0%	0.2%	2.5%	0.0%	0.0%
Other, Zone 2	2.4%	7.5%	1.7%	2.3%	5.0%	0.0%	0.0%
Total Zone 2	***7.6%***	***32.6%***	***10.0%***	***6.5%***	***22.7%***	***0.0%***	***1.6%***
Zone 3							
Co-Op Food, Station Road, New Waltham, Grimsby, DN36 4QQ	0.3%	0.0%	2.5%	0.0%	0.3%	0.0%	0.0%
Tesco Extra, Hewitts Circus Retail Park, Hewitts Avenue, Humberston, Cleethorpes, DN35 9QR	8.6%	13.3%	45.0%	0.6%	14.0%	0.3%	4.2%
Other, Zone 3	1.4%	1.2%	9.9%	0.1%	0.9%	0.0%	0.8%
Total Zone 3	***10.3%***	***14.5%***	***57.4%***	***0.7%***	***15.1%***	***0.3%***	***5.0%***
Zone 4							
Aldi, Washdyke Lane, Immingham, DN40 2AA	0.0%	0.0%	0.0%	38.5%	1.3%	2.3%	0.0%
Tesco Superstore, Kennedy Way, Washdyke Lane, Immingham, DN40 2AB	0.0%	0.0%	0.0%	19.9%	0.1%	2.9%	0.0%
Other, Zone 4	0.0%	0.0%	0.0%	6.5%	0.1%	0.4%	0.0%
Total Zone 4	***0.0%***	***0.0%***	***0.0%***	***64.9%***	***1.5%***	***5.6%***	***0.0%***
Zone 5							
Co-Op Food, High Street, Waltham, Grimsby, DN37 0LT	0.8%	0.0%	0.0%	0.0%	5.0%	0.0%	0.0%
Morrisons Superstore, Hilmore Road, Laceby, Grimsby, DN37 7SQ	3.1%	9.2%	0.8%	5.3%	30.7%	0.9%	2.0%
Other, Zone 5	0.0%	0.2%	0.0%	0.0%	4.1%	0.0%	0.0%
Total Zone 5	***3.9%***	***9.4%***	***0.8%***	***5.3%***	***39.8%***	***0.9%***	***2.0%***
Zone 6							
Aldi, Bridge Street, Brigg, DN20 8NF	0.0%	0.0%	0.0%	0.6%	0.0%	8.8%	0.0%
Lidl, Atherton Way, Brigg, DN20 8AR	0.0%	0.0%	0.0%	0.6%	0.0%	3.6%	0.3%
Lidl, Ferriby Road, Barton-upon-Humber, DN18 5LQ	0.0%	0.0%	0.0%	0.0%	0.0%	9.2%	0.0%
Local shops, Barton-upon-Humber Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	10.4%	0.0%
Local shops, Brigg Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%	0.1%
Tesco Superstore, Barnard Avenue, Brigg, DN20 8AT	0.0%	0.0%	0.0%	0.0%	0.0%	17.1%	0.9%
Tesco Superstore, Maltkiln Road, Barton-upon-Humber, DN18 5JT	0.0%	0.0%	0.0%	0.6%	0.0%	12.4%	0.0%
Other, Zone 6	0.0%	0.0%	0.0%	1.3%	0.9%	8.6%	0.0%
Total Zone 6	***0.0%***	***0.0%***	***0.0%***	***3.1%***	***0.9%***	***74.0%***	***1.3%***
Zone 7							
Aldi, Newbridge Hill, Louth, LN11 0JT	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	27.8%
Co-Op Food, Newmarket, Louth, LN11 9EH	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%
Local shops, Louth Town Centre	0.0%	0.0%	0.9%	0.0%	0.3%	0.0%	8.7%
Morrisons Superstore, Eastgate, Louth, LN11 9AB	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.8%
Tesco Superstore, Linwood Road, Market Rasen, LN8 3AW	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%
Other, Zone 7	0.0%	0.1%	1.2%	0.0%	0.1%	0.0%	8.2%
Total Zone 7	***0.0%***	***0.1%***	***2.1%***	***0.0%***	***0.4%***	***0.0%***	***71.5%***
TOTAL INSIDE STUDY AREA	**100.0%**	**98.9%**	**99.0%**	**99.2%**	**99.6%**	**82.7%**	**92.6%**
Hull							
Asda, Hessle Road, Hull, HU3 4PE	0.0%	0.0%	0.5%	0.0%	0.0%	2.2%	0.0%
Waitrose, Beverley Road, Hull, HU10 6EB	0.0%	0.4%	0.0%	0.0%	0.0%	2.6%	0.0%
Other, Hull	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%
Total Hull	***0.0%***	***0.4%***	***0.5%***	***0.0%***	***0.0%***	***7.0%***	***0.0%***
Lincoln							
Other, Lincoln	0.0%	0.0%	0.0%	0.0%	0.1%	1.2%	3.9%
Total Lincoln	***0.0%***	***0.0%***	***0.0%***	***0.0%***	***0.1%***	***1.2%***	***3.9%***
Scunthorpe							
Morrisons Superstore, Lakeside Parkway, Scunthorpe, DN16 3UA	0.0%	0.0%	0.0%	0.0%	0.0%	4.9%	0.0%
Other, Scunthorpe	0.0%	0.6%	0.0%	0.0%	0.2%	2.8%	1.5%
Total Scunthorpe	***0.0%***	***0.6%***	***0.0%***	***0.0%***	***0.2%***	***7.6%***	***1.5%***
Other							
Other, Outside Study Area	0.0%	0.0%	0.5%	0.8%	0.1%	1.4%	2.0%
Total Other	***0.0%***	***0.0%***	***0.5%***	***0.8%***	***0.1%***	***1.4%***	***2.0%***
TOTAL OUTSIDE STUDY AREA	**0.0%**	**1.1%**	**1.0%**	**0.8%**	**0.4%**	**17.3%**	**7.4%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes

1. The conven ence goods spend ng patte ns a e de ved f om the telephone household su vey unde taken n June - July 2024

Spreadsheet 5 - Convenience Goods Spending Patterns in 2024 across the Study Area Zones

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total	All Zones Market Share
	94.7	132.0	85.9	35.8	30.2	124.0	159.8	662.5	
	£m	£m	£m	£m	£m	£m	£m	£m	%
INSIDE STUDY AREA									
Zone 1									
Aldi, Cleethorpe Road, Grimsby, DN31 3BH	13.1	5.2	5.5	0.0	0.0	1.5	0.0	25.2	3.8%
Asda, Holles Street, Grimsby, DN32 9DL	22.0	11.6	3.1	1.3	2.3	0.0	3.7	44.0	6.6%
Iceland, Alexandra Retail Park, Alexandra Road, Grimsby, DN31 1SG	0.0	2.8	0.0	0.0	0.1	0.0	3.1	6.0	0.9%
Lidl, Ladysmith Road, Grimsby, DN32 9SW	7.1	1.7	3.1	0.1	0.3	0.0	1.0	13.2	2.0%
Local shops, Grimsby Town Centre	8.0	10.7	1.5	1.2	0.4	0.4	0.8	23.0	3.5%
Morrisons Daily, Grimsby Road, Cleethorpes, DN35 7HB	0.2	0.0	2.9	0.0	0.0	0.0	0.0	3.1	0.5%
Sainsbury's Superstore, Corporation Road, Grimsby, DN31 1UF	4.4	10.2	3.7	1.0	1.7	0.0	1.6	22.7	3.4%
Tesco Extra, Market Street, Grimsby, DN31 1PG	7.1	4.4	1.1	3.1	0.6	0.5	6.7	23.5	3.5%
Other, Zone 1	12.1	9.3	3.7	0.0	0.3	0.0	1.2	26.6	4.0%
Total Zone 1	***74.1***	***55.9***	***24.6***	***6.8***	***5.8***	***2.3***	***18.0***	***187.3***	**28.3%**
Zone 2									
Aldi, Magdalene Road, off Cambridge Road, Grimsby, DN34 5DN	2.9	14.3	1.2	0.4	2.3	0.0	1.6	22.7	3.4%
Aldi, Matthew Telford Park, Scartho Top, Grimsby, DN33 3ER	0.7	12.9	6.0	1.0	2.3	0.0	0.9	23.8	3.6%
Lidl, Cromwell Road, Grimsby, DN31 2BB	1.4	5.9	0.0	0.1	0.8	0.0	0.0	8.1	1.2%
Other, Zone 2	2.3	9.9	1.4	0.8	1.5	0.0	0.0	15.9	2.4%
Total Zone 2	**7.2**	**43.0**	**8.6**	**2.3**	**6.9**	**0.0**	**2.5**	**70.5**	**10.6%**
Zone 3									
Co-Op Food, Station Road, New Waltham, Grimsby, DN36 4QQ	0.2	0.0	2.1	0.0	0.1	0.0	0.0	2.5	0.4%
Tesco Extra, Hewitts Circus Retail Park, Hewitts Avenue, Humberston, Cleethorpes, DN35 9QR	8.2	17.6	38.6	0.2	4.2	0.3	6.8	75.9	11.5%
Other, Zone 3	1.3	1.6	8.5	0.0	0.3	0.0	1.3	13.0	2.0%
Total Zone 3	***9.7***	***19.1***	***49.3***	***0.2***	***4.6***	***0.3***	***8.0***	***91.3***	**13.8%**
Zone 4									
Aldi, Washdyke Lane, Immingham, DN40 2AA	0.0	0.0	0.0	13.8	0.4	2.8	0.0	17.0	2.6%
Tesco Superstore, Kennedy Way, Washdyke Lane, Immingham, DN40 2AB	0.0	0.0	0.0	7.1	0.0	3.6	0.0	10.8	1.6%
Other, Zone 4	0.0	0.0	0.0	2.3	0.0	0.5	0.0	2.9	0.4%
Total Zone 4	***0.0***	***0.0***	***0.0***	***23.2***	***0.5***	***7.0***	***0.0***	***30.7***	***4.6%***
Zone 5									
Co-Op Food, High Street, Waltham, Grimsby, DN37 0LT	0.7	0.0	0.0	0.0	1.5	0.0	0.0	2.3	0.3%
Morrisons Superstore, Hilmore Road, Laceby, Grimsby, DN37 7SQ	2.9	12.1	0.7	1.9	9.3	1.1	3.1	31.1	4.7%
Other, Zone 5	0.0	0.3	0.0	0.0	1.2	0.0	0.0	1.5	0.2%
Total Zone 5	***3.7***	***12.4***	***0.7***	***1.9***	***12.0***	***1.1***	***3.1***	***34.9***	***5.3%***
TOTAL NORTH EAST LINCOLNSHIRE	**94.7**	**130.5**	**83.2**	**34.4**	**29.7**	**10.7**	**31.6**	**414.8**	**62.6%**
Zone 6									
Aldi, Bridge Street, Brigg, DN20 8NF	0.0	0.0	0.0	0.2	0.0	10.9	0.0	11.1	1.7%
Lidl, Atherton Way, Brigg, DN20 8AR	0.0	0.0	0.0	0.2	0.0	4.4	0.4	5.0	0.8%
Lidl, Ferriby Road, Barton-upon-Humber, DN18 5LQ	0.0	0.0	0.0	0.0	0.0	11.3	0.0	11.3	1.7%
Local shops, Barton-upon-Humber Town Centre	0.0	0.0	0.0	0.0	0.0	12.9	0.0	12.9	2.0%
Local shops, Brigg Town Centre	0.0	0.0	0.0	0.0	0.0	5.0	0.1	5.1	0.8%
Tesco Superstore, Barnard Avenue, Brigg, DN20 8AT	0.0	0.0	0.0	0.0	0.0	21.2	1.5	22.7	3.4%
Tesco Superstore, Maltkiln Road, Barton-upon-Humber, DN18 5JT	0.0	0.0	0.0	0.2	0.0	15.3	0.0	15.5	2.3%
Other, Zone 6	0.0	0.0	0.0	0.5	0.3	10.7	0.1	11.5	1.7%
Total Zone 6	***0.0***	***0.0***	***0.0***	***1.1***	***0.3***	***91.8***	***2.1***	***95.3***	***14.4%***
Zone 7									
Aldi, Newbridge Hill, Louth, LN11 0JT	0.0	0.0	0.0	0.0	0.0	0.0	44.5	44.5	6.7%
Co-Op Food, Newmarket, Louth, LN11 9EH	0.0	0.0	0.0	0.0	0.0	0.0	3.4	3.4	0.5%
Local shops, Louth Town Centre	0.0	0.0	0.8	0.0	0.1	0.0	13.9	14.8	2.2%
Morrisons Superstore, Eastgate, Louth, LN11 9AB	0.0	0.0	0.0	0.0	0.0	0.0	33.2	33.2	5.0%
Tesco Superstore, Linwood Road, Market Rasen, LN8 3AW	0.0	0.0	0.0	0.0	0.0	0.0	6.1	6.1	0.9%
Other, Zone 7	0.0	0.2	1.0	0.0	0.0	0.0	13.2	14.4	2.2%
Total Zone 7	***0.0***	***0.2***	***1.8***	***0.0***	***0.1***	***0.0***	***114.3***	***116.5***	***17.6%***
TOTAL INSIDE STUDY AREA	**94.7**	**130.7**	**85.0**	**35.5**	**30.1**	**102.5**	**148.0**	**626.5**	**94.6%**
Hull									
Asda, Hessle Road, Hull, HU3 4PE	0.0	0.0	0.4	0.0	0.0	2.7	0.0	3.1	0.5%
Waitrose, Beverley Road, Hull, HU10 6EB	0.0	0.5	0.0	0.0	0.0	3.2	0.0	3.8	0.6%
Other, Hull	0.0	0.0	0.0	0.0	0.0	2.8	0.0	2.8	0.4%
Total Hull	***0.0***	***0.5***	***0.4***	***0.0***	***0.0***	***8.7***	***0.0***	***9.7***	***1.5%***
Lincoln									
Other, Lincoln	0.0	0.0	0.0	0.0	0.0	1.5	6.3	7.8	1.2%
Total Lincoln	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***	***1.5***	***6.3***	***7.8***	***1.2%***
Scunthorpe									
Morrisons Superstore, Lakeside Parkway, Scunthorpe, DN16 3UA	0.0	0.0	0.0	0.0	0.0	6.0	0.0	6.0	0.9%
Other, Scunthorpe	0.0	0.9	0.0	0.0	0.1	3.4	2.3	6.7	1.0%
Total Scunthorpe	***0.0***	***0.9***	***0.0***	***0.0***	***0.1***	***9.4***	***2.3***	***12.7***	***1.9%***
Other									
Other, Outside Study Area	0.0	0.0	0.4	0.3	0.0	1.8	3.2	5.7	0.9%
Total Other	***0.0***	***0.0***	***0.4***	***0.3***	***0.0***	***1.8***	***3.2***	***5.7***	***0.9%***
TOTAL OUTSIDE STUDY AREA	**0.0**	**1.4**	**0.8**	**0.3**	**0.1**	**21.5**	**11.8**	**35.9**	**5.4%**
TOTAL	**94.7**	**132.0**	**85.9**	**35.8**	**30.2**	**124.0**	**159.8**	**662.5**	**100.0%**

Notes

1. The spend ng patte ns a e calculated by mu t ply ng the total conven ence goods expend tu e n 2023 (Sp eadsheet 3) by the ma ket sha e (Sp eadsheet 4). The f gu es n the 'Total' column a e the sum of the expend tu e att acted to each cent e / sto e f om each zone.

2. The 'A l Zones Ma ket Sha e' s calculated by d v d ng the total expend tu e eta ned by each cent e / sto e by the total expend tu e n the study a ea.

Spreadsheet 6 - Convenience Retail Commitments

Application Proposal	Planning Application Ref. No.	Year of Opening	Gross Convenience Retail Floorspace (sq. m)	Sales Area Floorspace (sq. m)	Sales Density in Opening Year (£ / sq. m)	Turnover from Study Area in Opening Year (£m)
Refurbishment and extension of the existing disused building at St James House, Grimsby	DM/0720/23/FUL	2025	132	85.8	4,798	0.0
Partially demolish and redevelop western element of Freshney Place shopping centre	DM/0979/22/FUL	2025	890.5	578.8	4,798	0.3
Sub-total		**-**	**1022.5**	**665**	**-**	**0.3**

Notes

1. Retail floorspace area was taken from planning application material or based on Stantec estimate.

2. Sales density is based on Stantec estimate to reflect the average of main convenience goods retailers and to reflect nature and location of proposed development.

3. Net floorspace calculated at a 65% figure of gross floorspace.

4. Where the type of retail provision was not specified a 50/50 ratio was used between comparison and convenience floorspace provision.

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6. Base Year (2024) sales density figures were applied to the sales density in Opening Year.

Spreadsheet 7 - Summary of Capacity for Convenience Goods Retail Floorspace (Constant Retention Rate)

	2024	2029	2034	2039	2042	Change between 2024 - 2042
Total Population and Expenditure						
A. Total study area population (persons)	266,471	267,835	268,907	270,125	270,854	4,383
B. Total convenience goods expenditure (excluding SFT) (£m)	662.5	657.6	659.0	662.7	665.6	3.1
Retained Expenditure						
C. Convenience goods expenditure retained in study area (%)	94.6%	94 6%	94.6%	94.6%	94.6%	0.0
D. Convenience goods expenditure retained in study area (£m)	626.5	621.9	623.3	626 8	629.5	3.0
Inflow						
E. Inflow to study area at 10% (£m)	62.7	62.2	62.3	62.7	62.9	0.3
F. Growth in Inflow (£m)	0.0	-0.5	0.1	0.4	0.3	0.3
Total Turnover in Study Area						
G. Baseline convenience goods turnover of stores in study area (£m)	689.2	689.2	689.2	689 2	689.2	0.0
Initial Surplus						
H. Growth in retained convenience goods expenditure (£m)	0.0	-5.1	-3.6	0 3	3.2	3.2
Claims on Expenditure						
I. Sales density growth in existing stores (£m)	0.0	0.0	0.0	0.0	0.0	0.0
J. Turnover from commitments	0.0	0.3	0.3	0 3	0.3	0.3
K. Total claims on expenditure (£m)	0.0	0.3	0.3	0 3	0.3	0.3
L. Residual expenditure (£m)	0.0	-5.4	-3.9	-0.1	2.9	
Convenience Retail Floorspace Requirements (8)						
M. Assumed sales density (£/sq.m)	4,798	4,798	4,798	4,798	4,798	0
N. Floorspace requirement (sales area floorspace sq.m)	0	-1,133	-815	-12	610	610
O. Floorspace requirement (gross sq.m)	0	-1,742	-1,254	-18	939	939

Notes

1. Total population of the study area taken from Spreadsheet 1. Total convenience expenditure (excluding SFT) taken from Spreadsheet 3.

2. Retained expenditure - proportion of all convenience goods expenditure spent at retail facilities within the study area, taken from Spreadsheet 5. This is held constant throughout the assessment period.

3. Inflow - additional convenience goods expenditure drawn to retail facilities within the study area from residents outside the study area. Assumed to be 10% of retained expenditure in the study area.

4. Total convenience goods turnover of stores within study area in the base year taken from Spreadsheet 5.

5. Initial surplus - total growth in retained convenience goods expenditure before claims on expenditure.

6. Claims on expenditure - the turnover of commitments for new convenience retail floorspace in the study area taken from Spreadsheet 6. No allowance is made for improving sales efficiency in existing stores due to very low / negative forecasts of sales density growth.

7. Convenience retail floorspace requirements calculated by converting the residual expenditure using a sales density estimate of £ 4798 / sq.m in 2024 , increased anticipated sales density growth as outlined in Figure 4b of the Experian Retail Planner Note 21 (February 2024).

8. 65 % net to gross ratio assumed.

9. All monetary figures are rounded to one decimal place and all floorspace figures are rounded to the nearest square metre.