Town Centre and Retail Capacity Study

December 2013
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**Applied Town Planning Limited**  
1 Victoria Square, Birmingham B1 1BD  
T: 0121 632 2088  E: info@appliedtownplanning.com  W: www.appliedtownplanning.com
1 INTRODUCTION

The Purposes of the Study

1.1 The South East Lincolnshire Joint Strategic Planning Committee was established in July 2011 to produce a Local Plan for South East Lincolnshire covering the administrative areas of Boston Borough Council and South Holland District Council. The first element of the Local Plan will be a Strategy and Policies Development Plan Document (DPD) for the period to 2031.

1.2 Applied Town Planning Limited (Applied Planning) were appointed by the South East Lincolnshire Joint Policy Unit (SELJPU) in May 2013 to carry out a Town Centre and Retail Capacity Study which will form part of the Local Plan’s evidence base. The aims of the Study are to:

- set out the key national trends in various sub-sectors of the retail and other town centre related markets to provide a reference for the remainder of the Study;
- assess the current ‘health’ of the centres of Boston, Crowland, Donington, Holbeach, Kirton, Long Sutton, Spalding and Sutton Bridge including, where relevant, their once/twice weekly markets;
- assess the current patterns of retail spending in the comparison and convenience retail floor sectors, based on the results of surveys of households resident within South East Lincolnshire;
- assess the quantitative need for further comparison and convenience retail floor space in the periods up to 2016, 2021, 2026 and 2031 under various scenarios, taking into account claims on expenditure growth;
- assess the scope for further provision of other town centre related developments;
- define a network and hierarchy of centres across South East Lincolnshire;
- review and define the extent of town centres and, where appropriate, primary shopping areas based on a clear definition of primary and secondary frontages; and
- assess potential opportunities for accommodating any identified need for retail and other town centre related developments in South East Lincolnshire and, if appropriate, advise on reductions to existing allocations.

1.3 The principal settlements in South East Lincolnshire are classified by the South East Lincolnshire Strategy and Policies DPD ‘Combined Preferred Options and Sustainability Appraisal Report’ (May 2013) Document as the ‘Large Town Centres’ of Boston and Spalding and the ‘Small Town Centres’ of Crowland, Donington,
Holbeach, Kirton, Long Sutton and Sutton Bridge. The total population of the area was 152,900 at the 2011 census.
2 PLANNING POLICY FRAMEWORK

2.1 Upon adoption of the Strategies and Policies DPD a number of 'saved' policies from the Boston Borough Local Plan (1999) and the South Holland Local Plan (2006) will be replaced. Some other policies will continue to be 'saved' pending the adoption of the Site Allocations DPD. In the meantime, the requirement of the National Planning Policy Framework (NPPF) will provide the framework for the control of retail development as well as the basis for formulating policies and proposals for the retail elements of the Local Plan. This Study has also been prepared to meet the requirements of the NPPF.

National Planning Policy Framework

2.2 The NPPF was published in March 2012 and replaced previous guidance in the form of Planning Policy Statements (PPSs). It is stated at paragraph 14 that ‘At the heart of the National Planning Policy Framework is a presumption in favour of sustainable development, which should be seen as a golden thread running through both plan-making and decision-taking’.

2.3 The NPPF states that there are three dimensions to sustainable development; an economic role, a social role and an environmental role. This Study is primarily concerned with the economic role which is defined as ‘contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation; and by identifying and coordinating development requirements, including the provision of infrastructure’.

2.4 Paragraphs 23-27 of the NPPF set out the requirements for ensuring the vitality of town centres. The Framework states that planning policies should be positive, promote competitive town centre environments and set out policies managing the growth of centres over the plan period.

2.5 The NPPF advises that in drawing up Local Plans, local authorities should:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- Define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- Promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- Retain and enhance existing markets and, where appropriate, reintroduce or create new ones, ensuring that markets remain attractive and competitive;
• Allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;

• Allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;

• Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;

• Recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and

• Where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

2.6 The NPPF also includes requirements for plan making. Local Plans must be underpinned by a proportionate evidence base. At paragraph 158 it is stated that:

Each local planning authority should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. Local planning authorities should ensure that their assessment of and strategies for housing, employment and other uses are integrated, and that they take full account of relevant market and economic signals.

2.7 Paragraph 161 states that local planning authorities should use this evidence base to assess:

• The needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;

• The existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs. Reviews of land available for economic development should be undertaken at the same time as, or combined with, Strategic Housing Land Availability Assessments and should include a reappraisal of the suitability of previously allocated land;

• The role and function of town centres and the relationship between them, including any trends in the performance of centres;
• **The capacity of existing centres to accommodate new town centre development;**

• **Locations of deprivation which may benefit from planned remedial action;** and

• **The needs of the food production industry and any barriers to investment that planning can resolve.**

2.8 The NPPF also provides guidance on planning applications for town centre uses and states that local planning authorities should apply a sequential test to planning applications for main town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan. They should require applications for main town centre uses to be located in town centres, then in edge-of-centre locations and only if suitable sites are not available should out-of-centre sites be considered. When considering edge-of-centre and out-of-centre proposals, preference should be given to accessible sites that are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale.

2.9 Furthermore the Framework states that when assessing applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date Local 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 2,500 sq m). This should include assessment of:

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

• **The impact of the proposal on town centres vitality and viability, including local consumer choice and trade in the town centre and wider, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should also be assessed up to ten years from the time the application is made.**

2.10 Where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the above factors, it should be refused.
3 RETAIL OVERVIEW

3.1 This Study has been produced during an extended period of economic recession which has impacted heavily on the retail market with the majority of centres throughout the UK experiencing higher vacancy rates and longer void periods. The results have been well documented and publicised through initiatives such as the report by Mary Portas.

3.2 Many household names have disappeared altogether and many others have undergone restructuring that has led to the closure of weaker branches. Whilst these names will naturally make the headlines their effects have been felt mainly in the larger centres and it is the loss of many independent traders that has affected smaller centres.

3.3 It is difficult to forecast how long the effects of the recession will last but, as recessions are cyclical, economic growth will return in due course which will lead to an improved retail environment. However, the problems being experienced by many centres are not wholly related to the recession. For example, the problems faced by retailers such as HMV and Blockbuster are largely one of changes in technology that have changed the way that products such as entertainment media are purchased.

3.4 Competition from out-of-centre stores particularly the larger superstores selling a wide range of comparison goods as well as groceries and the growth of internet based retailing cannot be reversed and these changes are structural rather than cyclical.

3.5 Retailing is probably the most dynamic sector of the property market and a high proportion of retail expenditure is in effect ‘mobile’. Shoppers often have the choice of centres and stores and will travel to the one that best meets their needs. Retailers are drawn to locations with high existing or potential expenditure flows. As demand for those centres increases so do rental levels and investment yields tighten making redevelopments more viable. The opposite is equally true with centres being at risk of a spiral of decline.

3.6 Change is inevitable and centres will need to continue to evolve to meet new challenges. Centres must develop their own identity and niche markets which will widen their potential catchment area. Town centres often set the character of an area and the challenge is to ensure that town centres remain the primary focus for retail activity along with complementary services and leisure uses and that these centres are attractive to their catchment populations. In some cases this may result in less, but better quality retail floorspace with new complimentary uses, such as increased catering and leisure uses, moving into the centre.

3.7 Store vacancy rates across the country have increased from 5.4% in December 2008 to 14.1% in March 2013 (according to the Local Data Company) and the Centre for Retail Research expect the total number of shops to fall by 22% over the next five
years although the situation varies across the country and disadvantaged retail pockets become more prominent.

3.8 It is not only the high street that is affected. Major retailers like Tesco, Wickes, ASDA and B&Q have announced dramatic reductions in opening large new stores and all have plans to subdivide some larger stores, leasing space to other retailers. This may give rise to more applications to vary user restrictions on retail units and local authorities must actively manage the portfolio of retail properties to meet long term needs. For instance, many bulky goods retailers have been badly affected by the recession and many authorities are under pressure to relax user restrictions to bring units back in to use. The danger is that as the recession ends, demand for carpets, furniture, DIY and large electrical products will return and if units that had been restricted to bulky goods have been lost that development pressure will grow to allow for a new generation of out-of-town units to meet demand.

3.9 Supermarket operators have signalled an end to the building of more and more large format stores as many shoppers are now using the internet and home delivery for their main food shopping and supplementing this with more trips to smaller stores nearer home or in the town centres for day-to-day top up shopping.

3.10 High Street shops are expensive in terms of rent and business rates and are reliant on time-charged car parking. Out-of-centre retailing usually takes place from cost efficient 'sheds' and the large internet based retailers such as Amazon operate from large warehouses.

3.11 The Centre for Retail Research point out that these changes will have unintended consequences for the many hundreds of £billions tied up in retail property by pension funds, investment companies, shopping centre owners and retailers themselves. The current business model is intimately involved with real estate. A significant fall in property prices caused by major falls in the demand for stores (and store profitability) will affect all property assets for many years to come. One response will be to reduce rents (and therefore the profitability of developments). It is already having a significant negative effect on many UK high streets and a detrimental impact on town centres.

3.12 Many of Britain's towns and cities now have a diverse ethnic mix and this is reflected in the shops serving those communities. Many supermarkets have sections catering for specialist foods and in those areas where there are concentrations of a particular ethnic group smaller independent stores have been established. These stores are usually in secondary retail areas and have a negligible effect on established trade patterns and generally can be regarded as having a beneficial effect on the retail areas where they locate terms of added diversity and retail interest and in reducing the incidence of shop vacancy rates.
The Future

Clearly retailing in general and town centre shopping will continue to face challenges and will undoubtedly evolve throughout the plan period. One could question the need for any more retail floorspace but there will need to be flexibility in the market to meet the changing needs of retailers. There are long standing policies aimed at protecting town centres and maybe these policies need to be implemented more stringently. Equally, town centres will need to be more attractive to shoppers with initiatives such as later evening closing times and free car parking after say 4:00 pm. Recent changes at a national level aim to make changes of use from shops to other uses such as residential easier. Whilst there may be a case for reducing overall floorspace in town centres over time, the remaining uses need to be concentrated with non-retail uses being accepted in to secondary locations.
4 METHODOLOGY

4.1 The Study is based on well established best practice techniques and follows the following stages:

Stage 1: Assessment of Demand
- Definition of Study Area
- Subdivision of Study Area into Zones
- 2001 and 2011 populations for each Zone through a Pitney Bowes Business Insight (PBBI) AnySite Report
- Trend based population projections up to 2031
- Spending profile of each zone's population by each goods type from the AnySite Report
- Forecast future growth in retail spending per head by goods type from the AnySite Report
- Adjust spending capacity to take account of Special Forms of Retailing (internet and catalogue sales)
- Apportion zones' spending to centres and stores by a Household Survey
- If appropriate, adjust available expenditure to take account of tourism spending to each centre

Stage 2: Assessment of Supply
- Survey each centre and, where appropriate, calculate net trading floorspace for each retail category. In smaller centres a qualitative assessment of how well the centre provides essential services to the local population will be more appropriate
- Estimate current retail capacity of each centre by calculating the 'trading density' (turnover per sq.m. net floorspace) for comparison and convenience goods by reference to expenditure flows identified in Stage 1 relative to 'benchmark' trading densities (the turnover that stores may be expected to achieve)
- Adjust the trading densities to take account of improvements in 'retail efficiency' (the ability of retailers to achieve greater turnovers from the same floorspace)
- Assess the effect of additional retail floorspace that could result from existing commitments and planned developments

Stage 3: Assessment of Need
- Calculate the quantitative need for additional retail floorspace for both comparison and convenience goods by comparing forecast demand over the plan period against the supply of floorspace
- Consider whether there is a need to make an allowance for any qualitative deficiencies
• Assess the amount of current vacant floorspace and, where this is excessive to maintain an adequate level of vitality and viability, adjust the need for additional floorspace accordingly

Stage 4: Policy Formulation
• Identify town centre boundaries, primary shopping areas and primary shopping frontages where appropriate

Stage 1: Assessment of Demand

The Study Area

4.2 The first task is to establish the Study Area which is drawn in such a way as to capture as high a percentage of regular customers to the area’s centres as practically possible. The core of the Study Area, zones 1 - 7, corresponds essentially to the South East Lincolnshire Plan area whilst zones 8 - 12 are the fringe areas from which the centres within the plan area may derive some trade. The extensive Study Area captures all significant expenditure flows and therefore eliminates the need to assume an arbitrary in-flow of expenditure from beyond it’s boundaries.

Table 1: Post Code Zones

<table>
<thead>
<tr>
<th>Core Area</th>
</tr>
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<tbody>
<tr>
<td>1</td>
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<td>2</td>
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<td>3</td>
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<tr>
<td>4</td>
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<tr>
<td>5</td>
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<tr>
<td>6</td>
</tr>
<tr>
<td>7</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fringe Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
</tr>
<tr>
<td>9</td>
</tr>
<tr>
<td>10</td>
</tr>
<tr>
<td>11</td>
</tr>
<tr>
<td>12</td>
</tr>
</tbody>
</table>

4.3 The Zones are shown on Plan 2.
Population

4.4 Since the 2001 Census the Study Area's population has increased considerably mainly due to in-migration from eastern Europe drawn to employment opportunities in the agricultural and food production sectors. Consequently it is considered that mid-year estimates derived from the 2001 Census have underestimated the actual population and population projections based on these figures are not considered robust. Figures available from a study commissioned by Lincolnshire County Council from Edge Analytics Limited in March 2012 were considered but these are at an aggregated level and do not represent the actual growth rates at postcode level necessary for this analysis.

4.5 Population figures from the 2011 Census for the postcode areas used in this Study were made available in August 2013 but projections over the plan period based on the 2011 Census are not yet available. We have therefore projected future populations based on the actual growth that has occurred between 2001 and 2011. Clearly these figures are predicated on the recent in-migration rates being continued and this may prove not to be the case due to factors such as the saturation of job opportunities and scarcity of accommodation. For this reason the figures should be kept under regular review and if necessary the quantitative analysis of this Study recalculated. In any event we recommend that any new floorspace should meet five-year need.

Table 2: Population of Study Area Zones

<table>
<thead>
<tr>
<th>ZONE</th>
<th>2001</th>
<th>2011</th>
<th>2013</th>
<th>2016</th>
<th>2021</th>
<th>2026</th>
<th>2031</th>
<th>% Growth 2001 - 31</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Boston</td>
<td>46,567</td>
<td>53,245</td>
<td>54,581</td>
<td>56,584</td>
<td>59,923</td>
<td>63,262</td>
<td>66,601</td>
<td>43.0</td>
</tr>
<tr>
<td>2 Kirton</td>
<td>7,734</td>
<td>9,612</td>
<td>9,988</td>
<td>10,551</td>
<td>11,490</td>
<td>12,429</td>
<td>13,368</td>
<td>72.8</td>
</tr>
<tr>
<td>3 Donington</td>
<td>7,821</td>
<td>8,440</td>
<td>8,564</td>
<td>8,750</td>
<td>9,059</td>
<td>9,368</td>
<td>9,678</td>
<td>23.7</td>
</tr>
<tr>
<td>4 Spalding</td>
<td>36,831</td>
<td>44,199</td>
<td>45,673</td>
<td>47,883</td>
<td>51,567</td>
<td>55,251</td>
<td>58,935</td>
<td>60.0</td>
</tr>
<tr>
<td>5 Holbeach</td>
<td>17,103</td>
<td>19,972</td>
<td>19,436</td>
<td>19,907</td>
<td>20,841</td>
<td>21,776</td>
<td>22,710</td>
<td>32.8</td>
</tr>
<tr>
<td>6 The Suttons</td>
<td>10,293</td>
<td>11,401</td>
<td>11,623</td>
<td>11,955</td>
<td>12,509</td>
<td>13,063</td>
<td>13,617</td>
<td>32.3</td>
</tr>
<tr>
<td>7 Crowland</td>
<td>5,765</td>
<td>6,612</td>
<td>6,781</td>
<td>7,036</td>
<td>7,459</td>
<td>7,883</td>
<td>8,306</td>
<td>44.1</td>
</tr>
<tr>
<td>8 Wisbech Fringe</td>
<td>16,582</td>
<td>17,912</td>
<td>18,178</td>
<td>18,577</td>
<td>19,242</td>
<td>19,907</td>
<td>20,572</td>
<td>24.1</td>
</tr>
<tr>
<td>9 N. Peterborough</td>
<td>27,575</td>
<td>28,941</td>
<td>29,214</td>
<td>29,624</td>
<td>30,307</td>
<td>30,990</td>
<td>31,673</td>
<td>14.9</td>
</tr>
<tr>
<td>10 Bourne</td>
<td>18,964</td>
<td>21,906</td>
<td>22,494</td>
<td>23,377</td>
<td>24,848</td>
<td>26,319</td>
<td>27,790</td>
<td>46.5</td>
</tr>
<tr>
<td>11 Sleaford Fringe</td>
<td>24,922</td>
<td>28,321</td>
<td>29,001</td>
<td>30,021</td>
<td>31,720</td>
<td>33,420</td>
<td>35,119</td>
<td>40.9</td>
</tr>
<tr>
<td>12 Northern Fringe</td>
<td>10,328</td>
<td>10,835</td>
<td>10,936</td>
<td>11,089</td>
<td>11,342</td>
<td>11,596</td>
<td>11,849</td>
<td>14.7</td>
</tr>
<tr>
<td>TOTAL</td>
<td>230,485</td>
<td>260,396</td>
<td>266,378</td>
<td>275,352</td>
<td>290,307</td>
<td>305,263</td>
<td>320,218</td>
<td>38.9</td>
</tr>
</tbody>
</table>

Study Area Spending Profile

4.6 The AnySite report assesses the socio-economic profile of the Study Area which is a major determinant of an area’s spending capacity and characteristics in terms of demand for particular types of goods. We have applied the AnySite socio-economic profiles to future populations in order to ascertain the current and future demand for particular categories of goods.

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4.7 The following Table compares the spending profile of the Study Area with the average for Great Britain. Values over 100 show a higher propensity to spend on that goods category. These figures are used to calculate the spending capacity of each Zone by goods type.

### Table 3: Distribution of Comparison Spending

Source: PBBI AnySite Report

<table>
<thead>
<tr>
<th>Goods Category</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food</td>
<td>105</td>
</tr>
<tr>
<td>Alcoholic Drink</td>
<td>106</td>
</tr>
<tr>
<td>Tobacco</td>
<td>98</td>
</tr>
<tr>
<td>Books, Newspapers</td>
<td>101</td>
</tr>
<tr>
<td>Clothing &amp; Footwear</td>
<td>93</td>
</tr>
<tr>
<td>Furniture &amp; Textiles</td>
<td>93</td>
</tr>
<tr>
<td>Audio Visual Equipment</td>
<td>89</td>
</tr>
<tr>
<td>Hardware &amp; DIY</td>
<td>99</td>
</tr>
<tr>
<td>Other Goods</td>
<td>104</td>
</tr>
<tr>
<td>All Convenience</td>
<td>104</td>
</tr>
<tr>
<td>All Comparison</td>
<td>97</td>
</tr>
<tr>
<td>Bulky Goods</td>
<td>89</td>
</tr>
<tr>
<td>DIY Related Goods</td>
<td>100</td>
</tr>
</tbody>
</table>

**Adjustment for Special Forms of Retailing**

4.8 In order to provide a robust base for the Study we have assumed the national average for Special Forms of Retailing (which includes catalogue mail order shopping as well as internet shopping). According to the advice in PBBI's Retail Expenditure Guide 2012/2013 Special Forms of Retailing is forecast to rise from 13.8% of comparison spending in 2013 to 14.7% in 2022 and for convenience goods the rise is from 6.2% to 6.7% over the same period.

**Adjustment for Tourism**

4.9 A Scarborough Tourism Economic Activity Monitor (STEAM) Report was commissioned for South Holland in 2006/7 which showed an inflow of approximately £6m in 2007 for 'shopping'. This is a modest inflow which we assume would be balanced by expenditure outflow as a result of residents holidaying elsewhere and we have not adjusted available expenditure as a result of tourism.
Projection of Future Spending

4.10 By using long-term forecasts the effects of relatively short-term recessions and booms are evened out. Over the Study Area as a whole PBBI AnySite forecast that comparison expenditure is forecast to grow from £2,672/person in 2011 to £4,047/person in 2022 a growth of 51.5% in real terms whereas convenience expenditure is expected to increase from £1,849/person in 2011 to £1,860/person in 2022 which amounts to only 0.6%. The actual growth rates will vary from zone to zone depending on the socio-economic profile of the population.

Household Survey

4.11 In order to inform both the Quantitative and Qualitative Need Assessments a telephone survey of 1,500 households was undertaken in May 2013. In addition to ascertaining which stores and centres shoppers used the survey also asked questions in order to provide a wider understanding of shoppers’ views and habits. These results are referred to in the consideration of each centre.

Comparison Goods Shopping Patterns

4.12 The survey shows that of the Study Area's total spending of £680m on comparison goods, 27% is attracted to Boston (in-centre and out-of-centre), 18% to Spalding (in-centre and out-of-centre) and 3.5% to the Small Towns of Crowland, Donington, Holbeach, Kirton, Long Sutton, Sutton Bridge. The main 'leakage' was to Peterborough (23%), Lincoln (4.7%), Wisbech (4.4%), Kings Lynn (4.3%) and Bourne which is inside the Study Area (4.3%).

4.13 These results are affected by the peripheral zones where leakage to other competing centres can be expected to be high. By isolating the core zones 1 to 7, which correspond more closely to the South East Lincolnshire area, the results are as follows; in 2013, total comparison spending was £384m of which Boston accounts for 38.4% and Spalding 28.9%. The Small Towns account for 5.6% and other centres 1.3%. Leakage to centres outside the core area amounts to 25.7% with 15.7% going to Peterborough and 4.5% to Kings Lynn.

Convenience Goods Shopping Patterns

4.14 Total spending on convenience goods by residents in the Study Area amounts to £459m. As may be expected there is considerable leakage out of the Study Area to stores in neighbouring centres but this is almost wholly confined to flows from the peripheral zones.

Trading Densities

4.15 Trading Density is the amount of turnover of net retail floorspace expressed as £/sq m. The company average or 'benchmark' figures are derived from Mintel's Retail Rankings. These figures are used to assess the trading capacity of a store or a centre by using a typical 'basket' of values. Convenience based supermarkets such as Tesco typically turnover approximately £12,000/sq m with smaller convenience stores such as Spar averaging approximately £6,500/sq m. Based on our experience of convenience stores' turnovers elsewhere, we have adopted an overall benchmark of £10,000/sq m for this assessment for the 2013 base year.
4.16 Turnovers for comparison shops are much more variable and we have adopted 2013 base year benchmarks of £4,500/sq m for both Boston and Spalding. Both centres are currently trading at near this figure and both have comparatively low vacancy rates.

Retail Efficiency

4.17 Retail efficiency relates to expected improvements to the trading density in the future as retailers benefit from growth in spending and sell more goods from the same floorspace. We have adopted the advice from the Pitney Bowes Retail Expenditure Guide 2012/2013 which forecasts overall growth in retail efficiency for comparison goods at 1.8% per annum and 0.3% per annum for convenience goods.

4.18 In addition, in our view there are improvements that should be made to the town centres of both Boston and Spalding by encouraging a reduction in the amount of secondary trading in key locations. Accordingly we have increased the future growth in retail efficiency for comparison goods by an additional 0.5% pa which results in a trading efficiency figure of 6,776 sq m by the end of the plan period which we consider to be an appropriate objective. The result of this is to reduce the amount of new retail floorspace that would be otherwise indicated with a proportion of additional available spending being reserved to support existing businesses and to encourage the improvement of retailing in key locations.

Commitments and Vacant Space Allowance

4.19 These factors are considered in the assessments of each centre in the following Section.

Stage 2: Assessment of Supply

4.20 The net trading floorspaces for Boston and Spalding for convenience and comparison goods and for vacant buildings that have been in retail use or would be suitable for that purpose have been derived from Goad Surveys undertaken in 2012 and 2013, supplemented where necessary from the Institute of Grocery Distribution (IGD) data base and our own assessments. The assessment of floorspace in the other centres was by our own survey and, where available, from the IGD database.

4.21 With the exception of the larger supermarkets there is no reliable measure of available floorspace for the Small Town Centres. For these centres a qualitative analysis of the range of retail and other services is more appropriate in forming a view as to whether the centre provides for the essential needs of the local population.

Stage 3: Analysis of Need

4.22 The analysis of need for additional retail floorspace in Boston, Spalding and the Small Town Centres are considered in the following chapters.
Stage 4: Policy Formulation

Review of Boundaries

4.23 The report sets out suggested town centre boundaries, primary shopping frontages and primary shopping areas.

4.24 The boundaries are established using the following definitions which are taken from the now defunct PPS4 but are still referred to in Best Practice Guidance.

Town Centre Boundary

Defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on the proposals map.

Primary Shopping Area

Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area.

Primary Frontage

Primary frontages are likely to include a high proportion of retail uses.

Secondary Frontage

Secondary frontages provide greater opportunities for a diversity of uses.

Edge-of-Centre

For retail purposes, a location that is well connected to and within easy walking distance (i.e. up to 300 metres) of the primary shopping area. For all other main town centre uses, this is likely to be within 300 metres of a town centre boundary.

In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances. For example, local topography will affect pedestrians’ perceptions of easy walking distance from the centre. Other considerations include barriers, such as crossing major roads and car parks, the attractiveness and perceived safety of the route and the strength of attraction and size of the town centre. A site will not be well connected to a centre where it is physically separated from it by a barrier such as a major road, railway line or river and there is no existing or proposed pedestrian route which provides safe and convenient access to the centre.
**Out-of-Centre**
A location which is not in or on the edge of a centre but not necessarily outside the urban area.

**Out-of-Town**
An out-of-centre development outside the existing urban area.

4.25 Using the above definitions this Study defines Town Centre Boundaries, Primary Shopping Areas and Primary Shopping Frontages for the Large Town Centres of Boston and Spalding.

4.26 In addition the Study defines the Primary Shopping Areas in the Small Towns of Crowland, Donington, Holbeach, Kirton, Long Sutton and Sutton Bridge. This is the area in which Primary and Secondary Uses (individual units and small frontages) are located. The designation of the Primary Shopping Areas is important for development management purposes. If a proposed retail use is located outside this area it would be deemed to be edge-of-centre/out-of-centre and a sequential test and possibly a retail impact assessment would be required.

4.27 The Study does not define Primary Shopping Frontages in the Small Towns. This is because the centres do not have different ‘zones’ with a concentration of non A1 Uses. Instead different uses are pepper potted throughout the centres and there are no single streets which can reasonably be wholly classified as Primary Shopping Frontage. As such, if we were to define a Primary Shopping Frontage it would only extend to at most approximately five units, which in our view is insufficient to constitute a ‘frontage’. Furthermore even if a Primary Shopping Frontage were to be defined it would only represent a snap shot of where A1 uses were located when the Study was authored.

4.28 In addition, the Study does not define town centre boundaries for the Small Towns. A Town Centre Boundary is generally an area larger than the Primary Shopping Area which contains all town centre uses such as offices, leisure etc. Due to the function of the Small Towns as service centres which contain a range of uses the Primary Shopping Area and the Town Centre Boundary are effectively the same area and for development management purposes both retail and other town centre use proposals located outside the Primary Shopping Area should be considered not in-centre.
5  THE LARGE TOWN CENTRES

5.1  Boston and Spalding are classified as Large Town Centres in the South East Lincolnshire Strategy and Policies DPD ‘Combined Preferred Options and Sustainability Appraisal Report’ (May 2013). As such these towns should be expected to provide a good choice of comparison shops, large format superstores and major markets for most of the shopping needs of the northern part of the Study Area with modest levels of leakage to higher order centres such as Peterborough and Lincoln.

5.2  The following analysis compares data from Goad reports for Boston and Spalding against UK averages. The surveys were carried out in Boston in May 2012 and in January 2013 for Spalding. Boston has 92,642 sq m gross of total floorspace of which 56.9% was classified as being used by multiples compared with 66,843 sq m and 54.0% for Spalding. In both centres there is an overall tendency for businesses to be local independents compared to the UK average. Boston has a high proportion of comparison multiples but a low count for financial and business service multiples. Spalding registers higher than average proportion of Comparison, Retail Service and Financial and Business Service multiples.

5.3  The following chart shows the proportion of floorspace in each of the principal use categories for both centres compared with the UK average. The most notable features are the higher proportion of units selling comparison goods particularly in Spalding and the low vacancy rate again in Spalding.

5.4  The analysis changes slightly when looking at the numbers of units in a particular category rather than the amount of floorspace. This indicates that Boston has a high number of convenience businesses whereas Spalding has a higher number of Retail Service businesses. Spalding still has a relatively low vacancy rate but less marked.

Vacant Units

5.5  According to the 2013 Goad reports, 10.65% of units in Boston were vacant compared to 8.47% for Spalding. Both compare favourably with a UK average of 11.47%. Boston had 9,281 sq m of vacant floorspace equating to 10.02% of total floorspace which is slightly above the UK average of 9.26% whereas the corresponding figures for Spalding were 3,038 sq m of vacant floorspace which amounts to only 4.54% of total floorspace.
Chart 1: Retail Structure by Floorspace Source: Goad 2012/13

Chart 2: Retail Structure by Number of Units Source: Goad 2012/13
Qualitative Analysis

5.6 How a centre is perceived by both the local and wider markets is important. As part of the household survey a number of questions were posed in order to ascertain the views of respondents in the Study Area as a whole and those of the local zone. Respondents were asked to rate facilities on a scale of 1 to 5, 1 being very poor and 5 being excellent. The following table is the percentage of respondents expressing a view (excluding the 'don’t knows') who rated facilities as 3, 4 or 5, i.e. with a high degree of satisfaction for both Boston and Spalding.

5.7 This satisfaction survey shows generally high levels for both centres and from the wider market as well as the respective 'home' zones. The most notable exceptions are the low scores for Boston for both 'Cost of Parking' and the quality of the 'Environment' which includes the provision of toilets and seating.

Table 4: Qualitative Assessment Indicators

<table>
<thead>
<tr>
<th></th>
<th>BOSTON Study Area</th>
<th>BOSTON Zone 1</th>
<th>SPALDING Study Area</th>
<th>SPALDING Zone 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of shops</td>
<td>78</td>
<td>66</td>
<td>79</td>
<td>69</td>
</tr>
<tr>
<td>Quality of other facilities</td>
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<td>Cost of Parking</td>
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<td>Access by Public Transport</td>
<td>63</td>
<td>72</td>
<td>76</td>
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<tr>
<td>Environment</td>
<td>58</td>
<td>44</td>
<td>82</td>
<td>72</td>
</tr>
</tbody>
</table>
6 BOSTON

6.1 The main retail area of Boston is essentially linear with a well defined core area. To
the north is the Boston Shopping Park, an edge-of-centre retail park with its own
car park on Horncastle Road with a Morrisons foodstore, Sports Direct, Home
Bargains, Card Factory, Brantano, TK Maxx and Bathstore.

6.2 To the south is Wide Bargate which runs either side of a large car park which is also
used for markets. Retailing in this area is best described as sporadic and
interspersed with other uses such as estate agents and other offices, hotels, public
houses and take-away restaurants. The main retailers are Iceland, Heron Frozen
Foods, Co-operative foodstore, local independent shops Coneys (clothing) and
Cammacks (furniture) and the main Post Office.

Photo 1: Strait Bargate, Boston
Plan 3: Retail Structure, Boston Source: Goad 2013
6.3 Wide Bargate extends into the pedestrianised Strait Bargate. This street forms the core of the retail area where national chain retailers are located along with a local department store Oldrids. Running off Wide Bargate is Pescod Square, a recent development with retailers such as Next, Wilkinson, Peacocks, Poundland, Superdrug, Bon Marche and Game. Pescod Square provides a retail circuit with Strait Bargate.
6.4 Market Place includes Marks and Spencer to the north which is essentially the end of the prime shopping area. Although there are other multiple shops in this area including Edinburgh Woollen Mill and Boots retail uses are interspersed with non-retail uses such as banks, building societies, bars, take-aways and personal services particularly towards the south. On market days Market Place is lively but is otherwise used as a car park.

6.5 Retailing to the west of the river is largely secondary in nature with significant numbers of bars, restaurants and service providers with some large stores such as Dunelm and Wickes. Vacancy rates are also higher in this area.

Comparison Shopping in Boston

6.6 Overall, in 2013 Boston town centre accounted for £157.1m or 23.1% of the Study Area's comparison expenditure of £680m. Boston's out-of-centre stores, including those at Wyberton Chain Bridge, accounted for an additional £27.3m of expenditure. Boston is within Zone 1 of the Study Area and an analysis of the household survey indicates that 74.9% of the zone's spending is attracted to Boston Town Centre and a further 13.3% to the town's out-of-centre stores. Leakage of expenditure out of the zone is to the higher order centres of Peterborough (3.9%) and Lincoln (3.2%) with a modest 1.6% going to Spalding.
6.7 Boston also attracts 76.9% of Zone 2’s comparison expenditure and 76% of Zones 12. Lower levels of penetration are evident in Zone 3 where 31.9% is attracted, compared with 43% going to Spalding, and Zone 11 where 23.6% is attracted compared with 34.6% to Lincoln.

6.8 These figures show that Boston retains a high proportion of comparison expenditure from its immediate area with modest levels of leakage particularly towards the north and west. To the south, the town’s main competitor is Spalding which captures a higher proportion of expenditure from Zone 3 (Donington). A major factor in determining the influence of Boston in the wider area is its relative isolation from other centres and poor communications in terms of journey times. This factor will also assist in minimising the amount of leakage out of the immediate catchment area to competing centres.

Retail Composition

6.9 The following chart shows the distribution of comparison shopping as a percentage of turnover and shows a relatively even distribution across the goods categories with a significant percentage of clothing, which is a good indicator of the town’s function as a higher order centre.

Chart 3: Composition of Boston’s Comparison Shopping by Turnover (%)
Convenience Shopping in Boston

6.10 Convenience shopping usually takes place nearer to home or is linked with other trips such as journey to work. This is particularly the case for 'top-up' frequent purchases such as bread and milk and day-to-day foodstuffs. Main bulk shopping trips are less frequent and are usually to the larger supermarkets and superstores with a high proportion not being linked to other activity. For many in more remote communities, or without access to a car, there is little distinction between main and top-up shopping trips and it is important that all communities have ready access to convenience stores that can meet most needs.

6.11 Boston town centre contains a number of convenience stores including Co-op and M&S along with Iceland and Heron Frozen Foods. There is an edge-of-centre Morrisons (formerly a Netto store) with a turnover of £8.4m and out-of-centre Aldi (£13.2m) and large-format superstores, ASDA (£40.6m) and Tesco (£37.3m).

6.12 The town centre retains butchers and bakers but is poorly represented by greengrocers and fishmongers. Although there is no market hall, Boston's markets held on Wednesday and Saturday in Market Place and Saturday at Bargate Green, where monthly farmer's markets are also held, clearly play a major role in the supply of greengrocery, fish, cheese and meat. The town also has a number of convenience stores particularly in the area to the west of the river which cater to the town's large eastern European communities.

6.13 The total convenience goods expenditure in the Study Area in 2013 is estimated to be £459m. Stores in Boston account for £120.6m, or 26.4%, of this total of which 19.4% is accounted for by convenience stores in the town centre (including Morrisons). Trade is attracted from outside Zone 1 primarily to the superstores from Zone 2 Kirton (65.8% of convenience expenditure), Zone 12 Northern Fringe (57.3%), Zone 11 Sleaford Fringe (21%) and Zone 3 Donington (17.3%). Again this demonstrates that Boston's catchment area is primarily to the north and west along with Kirton and that Donington looks more to Sleaford which attracts 56% of Zone 3's convenience expenditure.

Quantitative Need Assessment

6.14 The assessment of need is calculated by estimating the turnover of the Study Area and projecting this forward to take in to account changes in population and spending per head derived from the PIBI AnySite report and adjusted for factors such as 'special forms of retailing' including internet expenditure. From this we can calculate Boston's share and project this forward assuming that the market share remains constant. Boston's existing share of the Study Area's turnover is 27.1% for comparison goods and 26.3% for convenience goods.

6.15 This then gives us the turnover of stores in Boston and by applying the amount of floorspace the existing 'trading density' or turnover per sq m. By applying a figure based on similar towns, referred to as the target benchmark trading density we can calculate whether there is sufficient surplus expenditure available to support new floorspace. These figures are then projected forward anticipating improvements to the benchmark trading density based on increased retail efficiency.
Comparison Goods Need Analysis

6.16 The following chart shows the need analysis for future floorspace for comparison goods in Boston based on a 2013 benchmark of £4,500 sq m which reflects the range of in-centre and out-of-centre stores. This shows that in 2013 there is only a modest ‘need’ for 102 sq m net of additional floorspace rising to 3,276 sq m by 2016 and to 17,294 sq m net by the end of the plan period.

6.17 This need for additional floorspace is essentially fuelled by the anticipated growth in population. As explained in paragraph 4.4, we have assumed that the high growth that occurred between the Census of 2001 and 2011, largely as a result of in-migration from eastern Europe, will be maintained. This may not be the case due to the jobs market becoming saturated or due to a lack of housing. The actual population increase should be monitored and, if necessary, these need figures revised. In any event we would recommend that allocations are made to account for growth over a five year period only.

Table 5: Boston: Comparison Floorspace Need

<table>
<thead>
<tr>
<th></th>
<th>Existing sq m net</th>
<th>Turnover £m</th>
<th>Existing £/sq m</th>
<th>Target £/sq m</th>
<th>Required sq m net</th>
<th>Need sq m net</th>
</tr>
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<tbody>
<tr>
<td>2013</td>
<td>40,868</td>
<td>184.36</td>
<td>4,511</td>
<td>4,500</td>
<td>40,970</td>
<td>102</td>
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<tr>
<td>2016</td>
<td>40,868</td>
<td>212.67</td>
<td>5,204</td>
<td>4,818</td>
<td>44,144</td>
<td>3,276</td>
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<tr>
<td>2021</td>
<td>40,868</td>
<td>245.79</td>
<td>6,014</td>
<td>5,398</td>
<td>45,534</td>
<td>4,666</td>
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<tr>
<td>2026</td>
<td>40,868</td>
<td>328.58</td>
<td>8,048</td>
<td>6,048</td>
<td>54,331</td>
<td>13,463</td>
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<tr>
<td>2031</td>
<td>40,868</td>
<td>394.11</td>
<td>9,643</td>
<td>6,776</td>
<td>58,162</td>
<td>17,294</td>
</tr>
</tbody>
</table>

Convenience Goods Need Analysis

6.18 Repeating the need calculations for convenience goods but utilising a benchmark turnover of £10,000 sq m it can be seen that in 2013 there is a surplus of space. There is no need for additional floorspace for convenience goods until 2021 and by 2031 it will only amount to 1,079 sq m.

Table 6: Boston Convenience Floorspace Need

<table>
<thead>
<tr>
<th></th>
<th>Existing sq m net</th>
<th>Turnover £m</th>
<th>Existing £/sq m</th>
<th>Target £/sq m</th>
<th>Required sq m net</th>
<th>Need sq m net</th>
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<tr>
<td>2013</td>
<td>12,698</td>
<td>120.58</td>
<td>9,496</td>
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<td>12,058</td>
<td>-640</td>
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<tr>
<td>2016</td>
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<td>2021</td>
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<td>11,451</td>
<td>10,554</td>
<td>13,777</td>
<td>1,079</td>
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Table 7: SWOT Analysis Boston

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
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<tbody>
<tr>
<td>Dominant position in local hierarchy</td>
<td>Limited size of local catchment, below threshold of many national retailers</td>
</tr>
<tr>
<td>Lack of nearby competition, reduces leakage</td>
<td>Loss of car parking on market days</td>
</tr>
<tr>
<td>Good retail offer</td>
<td></td>
</tr>
<tr>
<td>Attraction of market</td>
<td></td>
</tr>
<tr>
<td>Good environmental quality</td>
<td></td>
</tr>
<tr>
<td>Pedestrianised core area</td>
<td></td>
</tr>
<tr>
<td>Increasing population in catchment area</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Opportunities</td>
<td>Threats</td>
</tr>
<tr>
<td>Revitalise retailing in Market Place (Size, Frequency, Special events)</td>
<td>More edge-of-centre and out-of-centre units.</td>
</tr>
<tr>
<td>Extend Market (Size, Frequency, Special events)</td>
<td>Relaxation of user restrictions on edge and out-of-centre units</td>
</tr>
<tr>
<td></td>
<td>Threat of Internet greater where traditional shopping opportunities are limited</td>
</tr>
</tbody>
</table>
**Town Centre and Primary Shopping Boundaries and Primary Shopping Frontage Area**

6.19 The following Plans 4 and 5 show our suggested Town Centre Boundary, Primary Shopping Area and Primary Shopping Frontage area.

6.20 The Town Centre Boundary corresponds with some suggested minor modifications around Fydell Crescent to the General Business Area of the former Local Plan and follows John Adams Way and Queen Street as its eastern and southern boundaries as these major roads provide a clear demarcation for where town centre uses would be acceptable. The northern boundary follows the existing change of uses between prominently mixed town centre uses and the adjacent areas which are primarily residential in character and use. The Boston Shopping Park forms the northern most extent of the Town Centre.

6.21 A Primary Shopping Area was not defined in the previous Local Plan. Our recommended boundary includes the retail areas to the east of the river but excludes the Boston Shopping Park which we regard as edge-of-centre and areas to the west of the river which we regard as being tertiary.

6.22 The Primary Shopping Frontages are along Strait Bargate and Pescod Square but excludes Market Place except Marks and Spencer which has a high proportion of secondary shops and non A1 uses. Other shops within the suggested Primary Shopping Area but not designated within the Primary Shopping Frontage should be regarded as being Secondary Frontage Areas.
Plan 5: Boston Primary Shopping Area and Primary Shopping Frontage
Conclusions and Recommendations

6.23 In Boston we calculate that there is a requirement for an additional 102 sq m net of comparison floorspace and this will rise to 17,294 sq m by 2031. There is no need to allocated additional convenience floorspace until 2021 when there will be a requirement for 131 sq m rising to 1,079 sq m by the end of the plan period.

6.24 We would recommend that the need for an increase in comparison goods floorspace should be accommodated within the town centre and that any out-of-centre floorspace is restricted to the sale of bulky goods. There is no need to make specific site allocations to meet the projected need for additional convenience goods floorspace. Post 2021, we would recommend that any new floorspace is limited to small supermarkets of up to 500 sq m and convenience stores to meet underserved areas and new residential neighbourhoods.

6.25 We consider that the Town Centre could be improved by encouraging the improvement of the Market Place area and in particular the area to the south of St. Botolph’s Church and east of the river which would be suited to a mix of leisure and small scale specialist retail and tourist related uses. This is indicated by the blue circle on Plan 6. In terms of redevelopment opportunities we recommend that the area to the north of Wide Bargate centred on the Red Lion car park could provide a potential extension to the prime shopping area. For larger space uses, there may be the opportunity to provide an anchor to the north of the Primary Shopping Area around Tawney Street. Both of these potential redevelopment sites are indicated by red circles on Plan 6.
7 SPALDING

7.1 Spalding like Boston is classified as a Large Town Centre in the South East Lincolnshire Strategy and Policies DPD ‘Combined Preferred Options and Sustainability Appraisal Report’ (May 2013) and is the principal retail centre serving South Holland and the south of the Study Area. The main shopping street, Market Place/Hall Street is pedestrianised. This area accommodates a range of national multiple retailers such as Boots, WH Smith and Superdrug as well as local independents such as Beales’ department store. The shopping interest in this prime retail area is weakened by a high number of banks and building societies.

Photo 5: Spalding Town Centre

7.2 The markets held on Tuesdays and Saturdays attract shoppers to the town and add vibrancy to the town centre.
There is a considerable amount of secondary retail interspersed with A2, A3 and A4 uses along Winsover Road, Station Street/Sheep Market, New Road and The Crescent.

Retailing in Spalding is dominated by a band of modern, single storey, large floorplate retail units running from Aldi, B&M and Lidl on Winsover Road to the west, the Holland Retail Park which includes Sainsburys, Wilkinson, Halfords, Poundstretcher, Argos and Brantano, M&S Food, B&Q and Allied Carpets off Winfrey Avenue to Homebase and Carpetright on Westlode Street to the east. All of these stores should be regarded as edge-of-centre.
Plan 7: Spalding Retail Structure
Comparison Shopping in Spalding

7.1 Overall in 2013, Spalding Town Centre accounted for £110.92m or 16.3% of the Study Area’s comparison goods expenditure of £680m. Spalding’s out-of-centre stores, primarily Springfields Outlet Shopping Centre, accounted for an additional £10.28m of expenditure. As set out below, Springfields Outlet Shopping Centre attracts turnover from beyond the Study Area, due to it’s unique offer, and the actual turnover of Springfields will be higher than recorded in the household survey.

7.2 Spalding is within Zone 4 of the Study Area and the household survey results demonstrate that 63.7% (£70.70m) of the zone’s spending is attracted to Spalding Town Centre. Spalding Town Centre also attracts a notable quantum of expenditure, £17.21m, from Zone 5 Holbeach.

7.3 Leakage out of zone 4 is identified to a number of higher order centres including Peterborough £26.63m (22.7%) and Boston £9.17m (7.8%).

7.4 The following Diagram shows the proportion of comparison goods by percent of turnover in each category. This shows the importance of clothing, beauty and recreational products which is commensurate with Spalding’s role as a Sub-Regional centre.

Chart 5: Composition of Spalding’s Comparison Shopping (%)

7.5 Comparison retailing in Spalding is unusual due to the Springfields Outlet Shopping Centre which is situated on the north eastern edge of the town. The centre contains 55 units mainly fashion, footwear and accessory retailers including M&S Outlet, Gap, Nike, Clarks and Cotton Traders which are poorly represented in the town centre.
7.6 The catchment area of the Springfields Centre is shown on the following plan taken from the centre’s letting information which indicates that the Primary Catchment Area, where 50% of trade is expected to come from, corresponds broadly with the Study Area with the Secondary and Tertiary areas extending into other parts of the East Midlands and north Norfolk.

Plan 8: Springfield Outlet Shopping Centre Catchment Area. Source FSP/CES
Convenience Shopping in Spalding

7.7 Spalding Town Centre contains a Sainsburys (estimated turnover £31m), an Aldi (£10.9), Lidl (£3.4m), Marks & Spencer Simply Food (£4.3m) Heron (£0.7m) along with a number independent shops and the market which account for an estimated £2.6m of turnover in total.

7.8 There is an out-of-centre Morrisons (£40.7m) and stores serving local areas with an estimated turnover in total of £3.9m.

7.9 Out of the total convenience turnover for the Town Centre of £53m, £40.1m or 76% is derived from the 'home' zone. Zone 5 (Holbeach) contributes a further £4.2m. With Morrisons, 62% comes from the Home Zone with the remaining turnover being sourced from a wider area reflecting its out-of-centre characteristics.

Quantitative Need Assessment

Comparison Goods Need Analysis

7.10 The methodology follows that used in the analysis of Boston and the 2013 benchmark of £4,500 sq m reflects the retail mix in the town and the influence of the Springfields Centre. This shows that there is an oversupply of comparison floorspace until 2016 when there is a requirement for an additional 1,594 sq m net which grows to 10,810 sq m by the end of the plan period. As with Boston, we have increased retail efficiency by 0.5% p a above the usual 1.8% in order to encourage the improvement of retailing in Hall Place/Market Place.

Table 8: Spalding Comparison Floorspace Need

<table>
<thead>
<tr>
<th>Year</th>
<th>Existing sq m net</th>
<th>Turnover £m</th>
<th>Existing £/sq m</th>
<th>Target £/sq m</th>
<th>Required sq m net</th>
<th>Need sq m net</th>
</tr>
</thead>
<tbody>
<tr>
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<td>27,425</td>
<td>121.20</td>
<td>4,419</td>
<td>4,500</td>
<td>26,933</td>
<td>-492</td>
</tr>
<tr>
<td>2016</td>
<td>27,425</td>
<td>139.81</td>
<td>5,098</td>
<td>4,818</td>
<td>29,019</td>
<td>1,594</td>
</tr>
<tr>
<td>2021</td>
<td>27,425</td>
<td>151.57</td>
<td>5,891</td>
<td>5,398</td>
<td>29,933</td>
<td>2,508</td>
</tr>
<tr>
<td>2026</td>
<td>27,425</td>
<td>216.00</td>
<td>7,876</td>
<td>6,048</td>
<td>35,716</td>
<td>8,291</td>
</tr>
<tr>
<td>2031</td>
<td>27,425</td>
<td>259.08</td>
<td>9,447</td>
<td>6,776</td>
<td>38,235</td>
<td>10,810</td>
</tr>
</tbody>
</table>

Convenience Goods Need Analysis

7.11 Following the same methodology as outlined in the analysis of Boston, there is a current requirement for 895 sq m net of floorspace for convenience goods retailing which increases steadily to 2,286 sq m net by the end of the plan period.

Table 9: Spalding Convenience Floorspace Need

<table>
<thead>
<tr>
<th>Year</th>
<th>Existing sq m net</th>
<th>Turnover £m</th>
<th>Existing £/sq m</th>
<th>Target £/sq m</th>
<th>Required sq m net</th>
<th>Need sq m net</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>8,861</td>
<td>97.56</td>
<td>11,010</td>
<td>10,000</td>
<td>9,756</td>
<td>895</td>
</tr>
<tr>
<td>2016</td>
<td>8,861</td>
<td>100.81</td>
<td>11,377</td>
<td>10,090</td>
<td>9,991</td>
<td>1,130</td>
</tr>
<tr>
<td>2021</td>
<td>8,861</td>
<td>106.32</td>
<td>11,998</td>
<td>10,243</td>
<td>10,380</td>
<td>1,519</td>
</tr>
<tr>
<td>2026</td>
<td>8,861</td>
<td>111.98</td>
<td>12,637</td>
<td>10,397</td>
<td>10,770</td>
<td>1,909</td>
</tr>
<tr>
<td>2031</td>
<td>8,861</td>
<td>117.65</td>
<td>13,277</td>
<td>10,554</td>
<td>11,147</td>
<td>2,286</td>
</tr>
</tbody>
</table>
Chart 6: Retail Floorspace Need, Spalding

<table>
<thead>
<tr>
<th>Year</th>
<th>Comparison</th>
<th>Convenience</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>2000 sq m</td>
<td>1200 sq m</td>
</tr>
<tr>
<td>2021</td>
<td>4000 sq m</td>
<td>2400 sq m</td>
</tr>
<tr>
<td>2026</td>
<td>6000 sq m</td>
<td>3600 sq m</td>
</tr>
<tr>
<td>2031</td>
<td>8000 sq m</td>
<td>4800 sq m</td>
</tr>
</tbody>
</table>

Legend:
- Comparison
- Convenience
Qualitative Analysis

7.12 Taken as a whole Spalding has a good retail offer and Table 4 at paragraph 5.7 shows a high level of user satisfaction compared to Boston. Vacancy rates are low and the overall environment is good with little evidence of litter, graffiti and vandalism. However much of the retailing is provided by edge-of-centre stores and the out-of-centre Springfield Outlet Centre and the traditional town centre is weak in retail terms having a high proportion of banks and service uses which reduces the centre's sense of vitality on non-market days.

Table 10: SWOT Analysis Spalding

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of nearby competition, reduces leakage</td>
<td>Dependent on edge-of-centre non-descript retail units and out-of-centre Springfields Centre</td>
</tr>
<tr>
<td>Good overall retail offer</td>
<td>Limited size of local catchment, below threshold of many national retailers</td>
</tr>
<tr>
<td>Attraction of market</td>
<td>Much of car parking associated with edge-of-centre retail uses</td>
</tr>
<tr>
<td>Good environmental quality</td>
<td>Weak anchor to south of retail centre</td>
</tr>
<tr>
<td>Pedestrianised core area</td>
<td>Lack of a well defined 'retail centre'</td>
</tr>
<tr>
<td>Increasing population in catchment area</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revitalise the traditional town centre</td>
<td>More edge-of-centre and out-of-centre units.</td>
</tr>
<tr>
<td>Improve linkage between town centre and Holland Market</td>
<td>Relaxation of user restrictions on edge and out-of-centre units</td>
</tr>
<tr>
<td>Extend market (Size, Frequency, Special events)</td>
<td>Threat of Internet greater where traditional shopping opportunities are limited</td>
</tr>
</tbody>
</table>

Town Centre and Primary Shopping Boundaries and Primary Shopping Frontage Area

7.13 Plan 9 shows a proposed Town Centre Boundary which essentially corresponds to the Defined Retail Centre designation in the previous Local Plan. Plan 10 shows a proposed Primary Shopping Area which comprises the historic shopping area of Spalding but excludes the Spalding Market development and other retail warehouse type units to the north. Also shown on Plan 10 is a proposed Primary Shopping Frontage Area which relates broadly to the Primary Shopping Area designation of the previous Local Plan but excludes some properties in Sheep Market but extends the designation southwards along Market Place to reflect current retail uses.
Plan 10: Spalding Primary Shopping Area and Primary Frontage

KEY
- Primary Shopping Area
- Primary Shopping Frontage

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Conclusions and Recommendation

7.14 In Spalding there is no immediate need for additional comparison goods floorspace but by 2016 there will be a requirement for an additional 1,594 sq m net rising to 10,810 sq m by 2031. There is a current 'need' for an additional 895 sq m net of convenience floorspace rising to 2,286 sq m by the end of the plan period.

7.15 With regards to comparison floorspace there is clearly no need to plan for additional retail floorspace until towards the end of the plan period. We are of the view that the main priority should be to revitalise the retailing in the traditional heart of the town. The following Plan shows three potential development areas. A redevelopment of the Chapel Lane area would provide improved linkages between the heart of the town and the edge-of-centre stores to the north of the centre. In addition there is underutilised land around Red Lion Street and Gorse Lane which could yield development opportunities in due course. Further out-of-centre retail development should be resisted.

7.16 With regards to convenience shopping there is a modest current need of 895 sq m. This need is not to the extent that existing stores do not have the capacity to provide for retailing needs whilst maintaining a good level of service and amenity to customers. If our population growth assumptions prove to be accurate then there will be a need for 2,286 sq m additional convenience floorspace up to 2031 and we would recommend that this is provided to serve new residential development and underserved neighbourhoods possibly to anchor new local centres.
Plan 11: Spalding Potential Development Areas

KEY

Potential Development Sites

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8 THE SMALL TOWNS

8.1 As lower order centres within the retail hierarchy, the function of the Small Towns, as defined in the South East Lincolnshire Strategy and Policies DPD 'Combined Preferred Options and Sustainability Appraisal Report (May 2013), is to provide their immediate areas with essential services such as regular food shopping, chemists and post offices. Comparison shopping is likely to be limited although some smaller towns will have specialist shops which attract customers from a wider area. Most comparison shopping, particularly for items such as clothes and major purchases such as furniture along with a high proportion of main shopping trips, will be carried out in the higher order centres. It follows that spending on convenience goods will account for a high proportion of local spending in these smaller settlements. This is shown in the following chart comparing the percentage of total spending in a centre on convenience goods.

Chart 7: Convenience Goods Spending as a % of Total Retail Spending
Holbeach

8.2 Holbeach is approximately 8 miles to the east of Spalding within Zone 5 of the Study Area. The town is centred on a crossroads with retail development primarily along Fleet Street. There are 90 business units providing retail, professional and personal services and leisure related uses such as take-aways, bars and cafes.

Photo 9: High Street, Holbeach

Comparison Shopping in Holbeach

8.3 Zone 5 generated £48.46m of comparison expenditure in 2013. Of this 20.2% is retained in Holbeach with 37.5% being attracted to Spalding, 19.9% to Peterborough, 8% to Kings Lynn and 7.8% to Boston.

8.4 There are 23 comparison goods shops selling a range of products including chemists and hardware. There are eight vacant units amounting to under 9% of the stock and three charity shops. The level of vacancy is not particularly high but a number of these vacant units are in prominent positions which detract from the quality of the retail centre. There are nine hair and beauty salons as well as 10 take-aways and a number of cafes, bars and restaurants. There are also four banks and a post office.

8.5 The following diagram shows the importance of Health Products and to a lesser extent Furniture and Clothing as a percentage of the centre's turnover according to the household survey.
8.6 A total of 87.2% of expenditure to the Holbeach comparison stores originates in the home zone with a further 7.8% from the neighbouring Zone 4 indicating a localised catchment area.

**Convenience Shopping in Holbeach**

8.7 In 2013 Zone 5 generated a total convenience spending of £34.08m. Of this 54.3% is retained by Holbeach and 28.7% 'leaks' to Spalding. The main attractors being Morrisons Pinchbeck, Sainsbury's Spalding and the Co-operative in Long Sutton.

8.8 The total convenience turnover of stores in Holbeach was £22.88m of which Tesco with a net floorspace of 1,659 sq m accounted for 83% drawn in the main from Zone 5 with some attraction from Zones 4 (Spalding) and 6 (Long Sutton). The trading density of around £11,531/sq m is regarded as healthy rather than excessive. In addition there is a Budgens of 734 sq m, a One Stop convenience store of 139 sq m, a bakers and a butchers shop. The smaller stores all draw their trade exclusively from Zone 5.
Photo 10: Tesco, Holbeach

Table 11: SWOT Analysis Holbeach

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tesco provides for a large amount of convenience shopping need</td>
<td>Proximity of Spalding</td>
</tr>
<tr>
<td>Has all the basic services</td>
<td>Limited size of local catchment restricts potential for more or better range of shops and services</td>
</tr>
<tr>
<td>Increased potential from population increase in catchment area</td>
<td></td>
</tr>
<tr>
<td>Good on-street car parking and car parking at Tesco</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revitalise some shop units</td>
<td>Improved facilities in Spalding</td>
</tr>
<tr>
<td></td>
<td>Threat of Internet greater where traditional shopping opportunities are limited</td>
</tr>
</tbody>
</table>

Review of Primary Shopping Area

8.9  
Our recommended Primary Shopping Area for Holbeach is shown on the Plan 12. The Primary Shopping Area extends along the High Street and is similar to the ‘Defined Retail Centre’ in the Adopted South Holland Local Plan (July 2006), albeit the Area extends further to the east beyond Budgens to include a number of A1 units which form part of the centre. Planning applications for town centre uses within this defined area should be considered in-centre.
Plan 12: Holbeach Primary Shopping Area

![Image of Holbeach Primary Shopping Area Map]
Conclusion and Recommendation

8.10 Holbeach retains a low level of its available comparison expenditure but a relatively high proportion of available convenience expenditure which we regard as a healthy balance given the proximity of Spalding. The analysis shows that these stores serve a local market. We conclude that the existing retail floorspace in Holbeach is sufficient to meet its needs over the plan period and that there is no requirement to allocate sites to accommodate new retail development. Any new development should be confined within the Primary Shopping Area shown on the following plan.
Crowland

8.11 Crowland is a small town mid way between Spalding and Peterborough, both being approximately 10 miles distant although Peterborough exerts the most influence over the town due to its relative size.

Photo 11: Crowland

Comparison Shopping in Crowland

8.12 The town is in Zone 7 of the Study Area. This zone generates £19m of comparison expenditure. A total of 9.1% is retained in Crowland, 71.8% is attracted to Peterborough and 12.6% attracted to Spalding. With regards to convenience expenditure, of £12.2m of convenience expenditure 19.4% is 'retained' in Crowland with 47.6% attracted to stores in Peterborough and 23.2% to stores in Spalding.

8.13 There are 33 business units, three of which were vacant at the time of survey. Six shops can be classified as selling comparison goods including a pharmacy, and there are six convenience stores including a Co-operative and a Spar which incorporates a Post Office. There are four shops in the Retail Services category all of which are hairdressers, 11 Leisure Services including take-aways, public houses and cafes and three Financial and Business Services although there is no bank.

8.14 Comparison shops in Crowland generate £1.79m of expenditure which is almost exclusively drawn from the 'home' zone with a very small amount drawn from the neighbouring Zone 6. The following chart shows the proportion of turnover for each goods category and clearly demonstrates the importance of Health Products (including cosmetics and medicines) and to a much lesser extent, DIY products in the local retail offer.
Chart 9: Composition of Crowland’s Comparison Shopping (%)

Convenience Shopping in Crowland

8.15 Convenience stores generate £2.76m of expenditure which is again dominated by the home zone although some expenditure is drawn from neighbouring Zone 5. The Co-operative store has a net floorspace of 176 sq m and we estimate the turnover is 2.47m resulting in a trading density of £14,034 which is very high.

Table 12: SWOT Analysis Crowland

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attractive Environment</td>
<td>Limited size of local catchment restricts potential for more or better range of shops and services</td>
</tr>
<tr>
<td>Has all the basic services</td>
<td></td>
</tr>
<tr>
<td>Increased potential from population increase in catchment area</td>
<td></td>
</tr>
<tr>
<td>Reasonable distance from competing centres</td>
<td></td>
</tr>
<tr>
<td>Reasonable on-street car parking</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improvement to some shop units</td>
<td>Increased dependence on Peterborough particularly from commuting</td>
</tr>
<tr>
<td>Develop tourist potential</td>
<td>Threat of Internet greater where traditional shopping opportunities are limited</td>
</tr>
</tbody>
</table>

...
Review of Primary Shopping Area

8.16 Our recommended Primary Shopping Area for Crowland is shown on the Plan 13. The Primary Shopping Area predominantly extends along North Street. The defined areas and is similar to the 'Defined Retail Centre' in the Adopted South Holland Local Plan (July 2006), albeit does not extend as far along South Street and include the residential properties which contained in the ‘Defined Retail Centre’ in the Adopted South Holland Local Plan (July 2006). Planning applications for town centre uses within this defined area should be considered in-centre.
Conclusions and Recommendation

8.17 There is a good range of stores in Crowland which serve the basic need of the local community. The town and surrounding area looks to Peterborough and, to a lesser extent, Spalding for much of its comparison and main convenience shopping needs which is consistent with the retail hierarchy. The retention of expenditure is low and this could be improved by additional convenience floorspace although there is insufficient available expenditure to support an additional store.

8.18 There is no overriding need to allocate new sites for retail development and any future proposals would have to be judged on their own merits but must, wherever possible be located within the existing shopping area.
Donington

8.19 Donington is a small town approximately 10 miles to the south-west of Boston and 9 miles to the north of Spalding.

Photo 12: Donington

Comparison Shopping in Donington

8.20 Donington is located in Zone 3 which we estimate generated £21.7m of comparison goods expenditure in 2013. Of this, 43.3% was drawn to Spalding, 31.7% to Boston, 12.5% to Peterborough, 2% to Lincoln and 2.5% being 'retained' in Donington. Spending on convenience goods from Zone 3 amounted to £15m in 2013. Of this 56.2% was drawn to Spalding, 17.3% to Boston and 9.7% being retained in Donington.

8.21 Donington contains 18 business units with one vacancy. Comparison shopping is very limited and other units are Retail Services such as opticians and hairdressers (7), Leisure Services including take-aways and public houses and Financial and Business Services. The household survey indicates the importance of furniture, health products and recreation goods in the retail offer.

Convenience Shopping in Donington

8.22 There are four convenience shops including a butchers, a bakers, a Costcutter convenience store which includes a Post Office and a Co-operative supermarket. The Co-operative store which has a net floor area of 241 sq m. which we estimate has a turnover of approaching £2.45m, £1.2m of which is drawn from the home zone. The store's trading density amounts to £10,165 sq m which is healthy for a store of this size and location.
Table 13: SWOT Analysis Donington

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reasonable environment</td>
<td>Small centre unlikely to attract other than local shoppers</td>
</tr>
<tr>
<td>Has all the basic services</td>
<td>Limited size of local catchment restricts potential for more or better range of shops and services</td>
</tr>
<tr>
<td>Some potential from population increase in catchment area</td>
<td></td>
</tr>
<tr>
<td>Reasonable distance from competing centres</td>
<td></td>
</tr>
<tr>
<td>Reasonable on-street car parking</td>
<td></td>
</tr>
<tr>
<td>Improved to some shop units</td>
<td>Threat of Internet greater where traditional shopping opportunities are limited</td>
</tr>
</tbody>
</table>

Review of Primary Shopping Boundary

8.23 Our recommended Primary Shopping Area for Donington is shown on the Plan 14. The Primary Shopping Area extends from Church Street to Black Swan Pub on High Street and is similar to the ‘Defined Retail Centre’ in the Adopted South Holland Local Plan (July 2006). Planning applications for town centre uses within this defined area should be considered in-centre.
Plan 14: Donington Primary Shopping Area

Town Centre and Retail Capacity Study
December 2013
Conclusion and Recommendation

8.24 Retailing in Donington is limited to meeting basic local needs with stores in Spalding and Boston providing for most of Zone 3’s retailing needs. This is compatible with the retail hierarchy and we see no need to recommend the allocation of sites for additional retail development.
Kirton

8.25 Kirton lies 4 miles south of Boston and 11 miles north of Spalding. Our survey identified 27 business units, only one of which was vacant. Of those six are classified as comparison goods including a charity shop, a hardware shop and a florist. There are five convenience shops including a butchers, two bakers and two convenience stores including a Co-operative and a Costcutter with a post office. There are five within the Retail Services category which includes hairdressers and beauty parlours, eight within the Leisure Services category which includes pubs, take-aways and a betting office and two units are classified as Business and Financial Services and include a bank.

Photo 13: Kirton

Comparison Shopping in Kirton

8.26 We estimate that the 2013 comparison expenditure generated in Zone 2 amounted to £23.32m and of this less than 1% was retained by the shops in Kirton with 77% being attracted to Boston and 8.2% to Spalding and 3.9% to Peterborough. As Kirton is predominantly not a ‘first choice destination’ for local residents the household survey has under-recorded the turnover of the centre.

8.27 This analysis indicates that the shops in Kirton serve a very localised market and that the residents of Zone 2 looks primarily to Boston for their shopping needs. However, given the proximity of Boston, the town primary local needs are being met by the existing shops and there is no need to make any specific allocation for new retail floorspace in Kirton.

Convenience Shopping in Kirton

8.28 The town's convenience stores have an estimated turnover of £3.2m with 95.6% coming from the home zone and the remainder from neighbouring Zone 1. The main convenience store is the Co-operative with a net floor area of 209 sq m. This
The store’s turnover is £2.85m giving a trading density of £13,636 sq m which is high for this kind of store.

8.29 The 2013 convenience expenditure from Zone 2 is estimated at £16.26m. A total of 18.8% is retained by convenience stores in Kirton with 65.8% being accounted for by stores in Boston and a further 11.7% by stores in Spalding.

Table 14: SWOT Analysis Kirton

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has all the basic services</td>
<td>Small centre unlikely to attract other than local shoppers</td>
</tr>
<tr>
<td>Increased potential from population increase in catchment area</td>
<td>Close to Boston</td>
</tr>
<tr>
<td>Reasonable on-street car parking</td>
<td>Limited size of local catchment restricts potential for more or better range of shops and services</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Opportunities</td>
<td>Threats</td>
</tr>
<tr>
<td>Improvement to some shop units and general environment</td>
<td>Threat of Internet greater where traditional shopping opportunities are limited</td>
</tr>
</tbody>
</table>

Review of Primary Shopping Area

8.30 Our recommended Primary Shopping Area for Kirton is shown on the Plan 15. The defined area primarily includes units on High Street, The Green and Station Road (extending to the Fire Station). Planning applications for town centre uses within this defined area should be considered in-centre.
Plan 15: Primary Shopping Area, Kirton
Conclusion and Recommendation

8.31 There is no overriding need to allocate new sites for retail development and any future proposals would have to be judged on their own merits but must, wherever possible be located within the defined Primary Shopping Area.
9 THE SUTTONS

9.1 Both Long Sutton and Sutton Bridge fall within Zone 6. There is approximately 3 miles between these settlements. A total of 45% of the Zone's comparison trade 'leaks' to Kings Lynn, 13.2% to Wisbech, 8.8% to Spalding and 6.5% to Peterborough. Wisbech also accounts for 24.3% of the Zone's convenience spend, Kings Lynn 20.9% and 11.8% by the Holbeach Tesco with Spalding contributing 4.5%.

9.2 In 2013 there was £28.25m of comparison and £20.35m of convenience expenditure available in Zone 6. A total of 14.65% of comparison expenditure was accounted for by stores in Long Sutton and 8.17% by those in Sutton Bridge. Of the convenience expenditure 29.6% was attracted to the Co-operative in Long Sutton and 4.9% to the Co-operative in Sutton Bridge. Other convenience stores in Long Sutton accounted for a further 0.74% and other shops in Sutton Bridge 2.4%.

9.3 Over 58% of Long Sutton's trade is derived from the home zone, the figure for Sutton Bridge is higher at over 83%. Long Sutton derives over 18% of its trade from each of Zones 5 and 8 whereas the only outside zone that Sutton Bridge attracts trade from is 11.9% from Zone 8.

Long Sutton

9.4 Long Sutton lies approximately 13 miles to the east of Spalding, nine miles north of Wisbech and 15 miles to the west of Kings Lynn. Our survey identified a total of 66 business units of which six were vacant, 19 were classified as comparison shops and include a chemists, hardware and electrical shops and clothes.

Photo 14: Long Sutton
**Comparison Shopping in Long Sutton**

9.5 The following diagram shows the percentage of comparison turnover by goods category and shows the dominance of health products and audio visual appliances in the local offer.

**Chart 10: Composition of Long Sutton's Comparison Shopping**

9.6 There were five convenience stores including a Co-operative supermarket with post office and a Spar at the eastern entrance to the town and 16 Retail Service shops which, in the main, were hairdressers. In addition there were nine Leisure Service units including public houses and take-aways and 11 Financial and Business Service units including two banks.

9.7 The Co-operative has a net floor area of 613 sq m and with an estimated turnover of £8.38m this results in a trading density of £13,670 sq m which is high for a store in this location.
Table 15: SWOT Analysis Long Sutton

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attractive retail area</td>
<td>Small centre unlikely to attract other than local shoppers</td>
</tr>
<tr>
<td>Has all the basic services</td>
<td>Limited size of local catchment restricts potential for more or better range of shops and services</td>
</tr>
<tr>
<td>Increased potential from population increase in catchment area</td>
<td>Effectively by-passed by A17 reduces passing trade</td>
</tr>
<tr>
<td>Reasonable car parking facilities</td>
<td></td>
</tr>
<tr>
<td>Lack of immediate competition</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improvement to some shop units and general environment</td>
<td>Threat of Internet greater where traditional shopping opportunities are limited</td>
</tr>
</tbody>
</table>

Review of Primary Shopping Area

Our recommended Primary Shopping Area for Long Sutton is shown on the Plan 16. The Primary Shopping Area extends along Market Place and the adjoining streets and is similar to the ‘Defined Retail Centre’ in the Adopted South Holland Local Plan (July 2006). Planning applications for town centre uses within this defined area should be considered in-centre.
Plan 16: Long Sutton Primary Shopping Area
Sutton Bridge

9.9 Sutton Bridge lies 17 miles to the east of Spalding and is influenced by both Kings Lynn and Wisbech both of which are approximately 11 miles distant. The shopping pattern is linear and is interspersed with residential and other uses and as a result there is no well defined 'centre'.

9.10 Our survey identified a total of 36 business units including a single vacancy. A total of nine were comparison shops and included two antique shops, a furniture shop and a pharmacy. There were eight convenience shops including a baker, a butcher and two greengrocers along with two small convenience stores and a Co-operative foodstore. The centre has five hairdressers and nine bars, restaurants and take-aways and four classified as Business and Financial Services.

Photo 16: Sutton Bridge

Comparison Shopping in Sutton Bridge

9.11 The following chart shows that the sale of Health Products, Furniture and Recreational Goods are important according to the results of the household survey.
Convenience Shopping in Sutton Bridge

The Sutton Bridge Co-operative store has a net floor area of 226 sq m and has a turnover of £1.28m resulting in a trading density of £5,664 sq m. This comparatively low figure will partially be as a result of the fact that Sutton Bridge is close to the Study Area boundary and will no doubt attract trade from the east that is not recorded.

Table 16: SWOT Analysis Sutton Bridge

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has all the basic services</td>
<td>Very linear and dispersed shopping pattern</td>
</tr>
<tr>
<td>Some specialist shops</td>
<td>Town effectively by-passed by A17 reduces passing trade</td>
</tr>
<tr>
<td>Isolated from immediate competition</td>
<td>Poor condition of some properties detracts from appearance of the centre</td>
</tr>
<tr>
<td></td>
<td>Small centre unlikely to attract other than local shoppers</td>
</tr>
<tr>
<td></td>
<td>Limited size of local catchment restricts potential for more or better range of shops and services</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improvement to some properties and general environment</td>
<td>Threat of Internet greater where traditional shopping opportunities are limited</td>
</tr>
</tbody>
</table>
Review of Primary Shopping Area

9.13 Our recommended Primary Shopping Area for Long Sutton is shown on the Plan 17. The Primary Shopping Area extends along Bridge Road and is similar to the ‘Defined Retail Centre’ in the Adopted South Holland Local Plan (July 2006). Planning applications for town centre uses within this defined area should be considered in-centre.
Plan 17: Sutton Bridge Primary Shopping Area
Conclusions and Recommendation

9.14 Both Long Sutton and Sutton Bridge provide essential services such as foodstores, chemists, post offices, personal and leisure uses to their immediate populations. Both also have individual shops selling items such as furniture and clothing which will attract trade from a slightly wider area. Both are also dependent on other higher order centres such as Kings Lynn and Wisbech for much of their comparison and main convenience shopping trips.

9.15 In both cases the current retail offer is sufficient to meet the essential retail needs of their respective local populations commensurate with their positions in the retail hierarchy without the need to allocate additional sites for retail development. Any new retail development should be within the existing extent of retailing in the town and should consolidate rather than extend these existing patterns.
10 MARKETS

10.1 The importance of markets is recognised in NPPF at paragraph 23 which considers the vitality of town centre it is stated that local authorities should 'retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive'.

10.2 Markets are particularly important in the retail offer of Boston and Spalding but markets are also held in Crowland, Holbeach and Long Sutton. The following chart shows the percentage of respondents in the household survey shopping at the various markets as well as those that do not shop at markets at all. As may be expected, Boston market draws large amounts of shoppers from the north of the Study Area with well over half of those questioned in Zones 1 (Boston), 2 (Kirton) and 12 (Northern Fringe) using the market. Over 50% of those questioned in Zones 3 (Donington) and 4 (Spalding) use the Spalding market. The other markets have a much more localised influence.

10.3 The household survey showed a good level of satisfaction with the local markets with 37.2% rating them as excellent or good and a further 34.1% as average. In terms of what improvements could be made to the markets, 35% of respondents thought that more stalls should be provided and 17.2% suggested a wider choice of goods.

Chart 12: Market Shoppers by Zones
11 LEISURE USES

11.1 Whilst the towns of Boston and Spalding have limited populations which restrict the variety of leisure facilities, these towns nevertheless play an important role in the provision of leisure activities for South East Lincolnshire which is essentially a rural area remote from other large centres of population.

11.2 As part of the household survey, respondents were asked where they went for leisure and entertainment activities such as the cinema, bowling or the theatre. 35% didn't know or said that they did not undertake these activities, 25.3% of respondents went to Peterborough, 23.4% to Boston and 6.8% to Spalding and smaller numbers identified Lincoln, Kings Lynn, Wisbech and the West End of London.

11.3 Boston has a cinema, and a theatre/arts centre and Spalding has the South Holland Centre which provides a venue for cinema and the performing arts and both towns have bowling alleys and Bingo halls. Boston and, to a lesser extent, Spalding have good ranges of bars and restaurants to cater for the evening economy.

11.4 Facilities in the Small Towns are more limited due to the size of local catchment populations but all have facilities based on food and drink; pubs, cafes, restaurants and take-aways.

11.5 Commercially provided leisure facilities are to some extent fashion driven and subject to swings in popularity. Many require sizeable populations within easy travelling distances and for these reasons these kind of leisure facilities are always going to be limited in South East Lincolnshire. Boston and Spalding do provide a range of leisure uses and other centres such as Peterborough will attract some trade from the area. It is unlikely that there will be any identifiable or predictable demand for facilities in the Local Centres or additional facilities in either Boston or Spalding.

11.6 For these reasons we do not consider it necessary to allocate land for commercial leisure purposes and any proposals that may materialise during the plan period will have to be judged on their own merits.
12 SUMMARY OF RECOMMENDATIONS

12.1 As outlined in Section 3, retailing in general has been under pressure over recent years as a result of the growth of out-of-centre retailing and internet based shopping as well as changes in technology which has impacted upon most retailers. Many of these pressures will remain after the economy has recovered from effects of the recent recession. Retailing will continue to change and towns will need to evolve to adjust to these changes in terms of the amount and type of floorspace available and how the centres themselves are managed. Clearly the retail market will be radically different in 2031 than it is in 2013 and this assessment will need to be reviewed periodically to take account of these changes.

12.2 The population of the area has undergone a rapid increase due in most part to inward migration from eastern Europe. Future trends are difficult to predict and our model is based on the recent levels of migration being maintained which we believe to be the most robust approach. Clearly these levels must be monitored and if necessary the findings of this report reviewed.

12.3 Our overall conclusion is that there is a well established and settled retail hierarchy in the plan area as set out in the South East Lincolnshire Strategy and Policies DPD ‘Combined Preferred Options and Sustainability Appraisal Report’ (May 2013) and we recommend that this should not change. There are acceptable levels of trade leakage to higher order centres such as Peterborough and Lincoln. Boston and Spalding provide good levels of retail service and cater for most retail needs.

12.4 In Boston we calculate that there is a requirement for an additional 102 sq m net of comparison floorspace and this will rise to 17,294 sq m by 2031. There is no need to allocated additional convenience floorspace until 2021 when there will be a requirement for 131 sq m rising to 1,079 sq m by the end of the plan period.

12.5 In Spalding there is no immediate need for additional comparison goods floorspace but by 2016 there will be a requirement for an additional 1,594 sq m net rising to 10,810 sq m by 2031. There is a current ‘need’ for an additional 895 sq m net of convenience floorspace rising to 2,286 sq m by the end of the plan period.

12.6 We recommend that new comparison floorspace is allocated in the town centres and that priority is given to strengthening the historic retail centres of both towns. New convenience floorspace should be located in areas that are currently underserved and to serve new residential neighbourhoods where they can anchor new local centres.

12.7 The Small Towns provide for the essential needs of their local communities including basic food shopping and access to key services such as pharmacy, post office, hairdressers and leisure services. The size of the local markets are such that there is inadequate expenditure to support new stores and we do not recommend that additional sites are allocated for retail development in any of these centres. Any applications that are made will have to be judged on their own merits but in all cases should be confined within the existing retail areas of the centre.
12.8 We conclude that all the centres provide good levels of service commensurate with their position in the retail hierarchy and size of their respective retail hinterlands. None of the centres exhibit high levels of vacancy which is the most obvious indicator of 'retail stress' and overall all could be described as healthy.

12.9 We note the recommended thresholds in the South East Lincolnshire Strategy and Policies DPD ‘Combined Preferred Options and Sustainability Appraisal Report’ (May 2013) of 2,500 sq m net for Boston and Spalding and 500 sq m elsewhere. We are of the opinion that these thresholds do not give the authorities adequate control and we recommend that retail thresholds, above which retail impact studies have to be undertaken in support of proposed retail development, be set at 500 sq m net in Boston and Spalding and 250 sq m net in all other settlements. Whilst we are of the opinion that all the centres surveyed are 'healthy' in retail terms, all are susceptible, to varying degrees, to potential changes and challenges which are likely to occur over the plan period. We believe that these thresholds recognise the scale of retailing in these centres and would assist authorities in managing change and maintaining their current levels of health.