Braintree Retail Study 2018 Update

Braintree District Council

21 May 2018

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Appendices

1.0 Introduction

Study objectives

1.1 Lichfields has been commissioned by Braintree District Council (BDC) to prepare a Retail Study Update. Lichfields prepared the previous Retail Study Updates in 2012 and 2015.

1.2 The key objective of the study is to provide a robust and credible evidence base to inform the Council's development plan, taking into account changes since the 2015 Retail Study Update and incorporating revised housing forecasts. The study provides:

- a qualitative analysis of the existing retail and leisure facilities within Braintree District's town and local centres, identification of the role of each centre, catchment areas and the relationship between the centres; and
- a quantitative and qualitative assessment of the need for new retail facilities within Braintree District, and the need for leisure and other main town centre uses. This assessment will examine the need for both food and non-food retailing including a qualitative analysis for different forms of facilities such as retail warehousing, local shops, large food stores and traditional high street comparison shopping.

1.3 The Braintree Retail Study Update provides a robust and credible evidence base to inform the Council's work on emerging policy documents. The study includes an assessment of:

1. changes in circumstances and shopping patterns since the previous studies were undertaken;
2. the future need and (residual) capacity for retail, food and beverage and leisure floorspace distributed by the main centres for the period up to 2033;
3. the potential implications of emerging developments both within and outside the District, in terms of impact on town centres and potential changes to shopping patterns;
4. the existing retail hierarchy and network of centres and advises whether any changes are required;
5. development plan policies, allocations and recommendations on how each centre can develop its role.

Report structure

1.4 The Report is structured as follows:

- Section 2 of this report describes the shopping hierarchy;
- Section 3 outlines retail trends and provides a retail capacity and need assessment;
- Section 4 assesses the scope for food and beverage and commercial leisure uses;
- Section 5 reviews retail policies;
- Section 6 provides recommendations on how the forecast growth can be accommodated, based on a review of the 2015 Retail Study Update recommendations; and
- Section 7 provides a summary of the recommendations and conclusions.

2.0 The shopping hierarchy

Introduction

2.1 The National Planning Policy Framework (NPPF) indicates (paragraph 23) that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Local Plans are expected to define a network and hierarchy of centres that is resilient to anticipated future economic changes.

2.2 The Planning Practice Guidance (PPG) places emphasis on developing strategies for town centres that are appropriate and realistic to the role of centres in the hierarchy. Town centre strategies should be based on the current state of a centre and opportunities to meet development needs (in full). These town centre strategies should seek to support the town centre vitality and viability, and should assess if changes to the role and hierarchy of centres are appropriate.

2.3 This section provides an overview of the shopping hierarchy in Braintree District and the surrounding sub-region.

Centres in Braintree District and the surrounding area

2.4 Braintree District is located in the north of Essex, bounded by Colchester, Maldon, Chelmsford, Uttlesford, South Cambridgeshire, St Edmundsbury and Babergh. The District contains the town centres of Braintree, Witham and Halstead which are supported by a district centre at Great Notley and a number of smaller local centres catering for local needs. Braintree Freeport and Braintree Retail Park together form a large out-of-centre retail area to the south of Braintree town.

2.5 The adopted Core Strategy (2011) sets out policies on retail and town centres, which seeks to protect and enhance the main town centres to maintain their role as local service centres providing services for the local population. Outside of the town centres Braintree Freeport and Braintree Retail Park form a specialist out-of-centre shopping experience. The emerging Local Plan (2017) contains updated policies for retail and town centres in the District, based on the 2015 Retail Study update.

2.6 The Javelin Group's Venuescore ranks over 3,500 retail destinations in the UK including town centres, malls, retail warehouse parks and factory outlet centres across the country. Each destination is given a weighted score based on the number of multiple retailers present, including anchor stores, fashion operators and non-fashion multiples. The score attached to each retailer is weighted depending on their overall impact on shopping patterns, e.g. department stores are assigned higher scores than smaller shops.

2.7 This Javelin information is used in the retail industry to assess the relative strength of shopping destinations. Braintree town centre, Braintree Freeport, Halstead and Witham are listed within Venuescore's data. The other smaller centres in the District have few multiple retailers and are not included within Venuescore analysis.

2.8 The results for the destinations and other relevant centres outside of the District are shown in Table 2.1. This information suggests that Braintree town centre and Freeport are third tier centres that fall within the sub-regional shopping catchment areas of larger centres. Witham and Halstead are smaller district level centres. The location of these Venuescore centres is shown in Figure 2.1.

Table 2.1 Venuescore UK Shopping Index

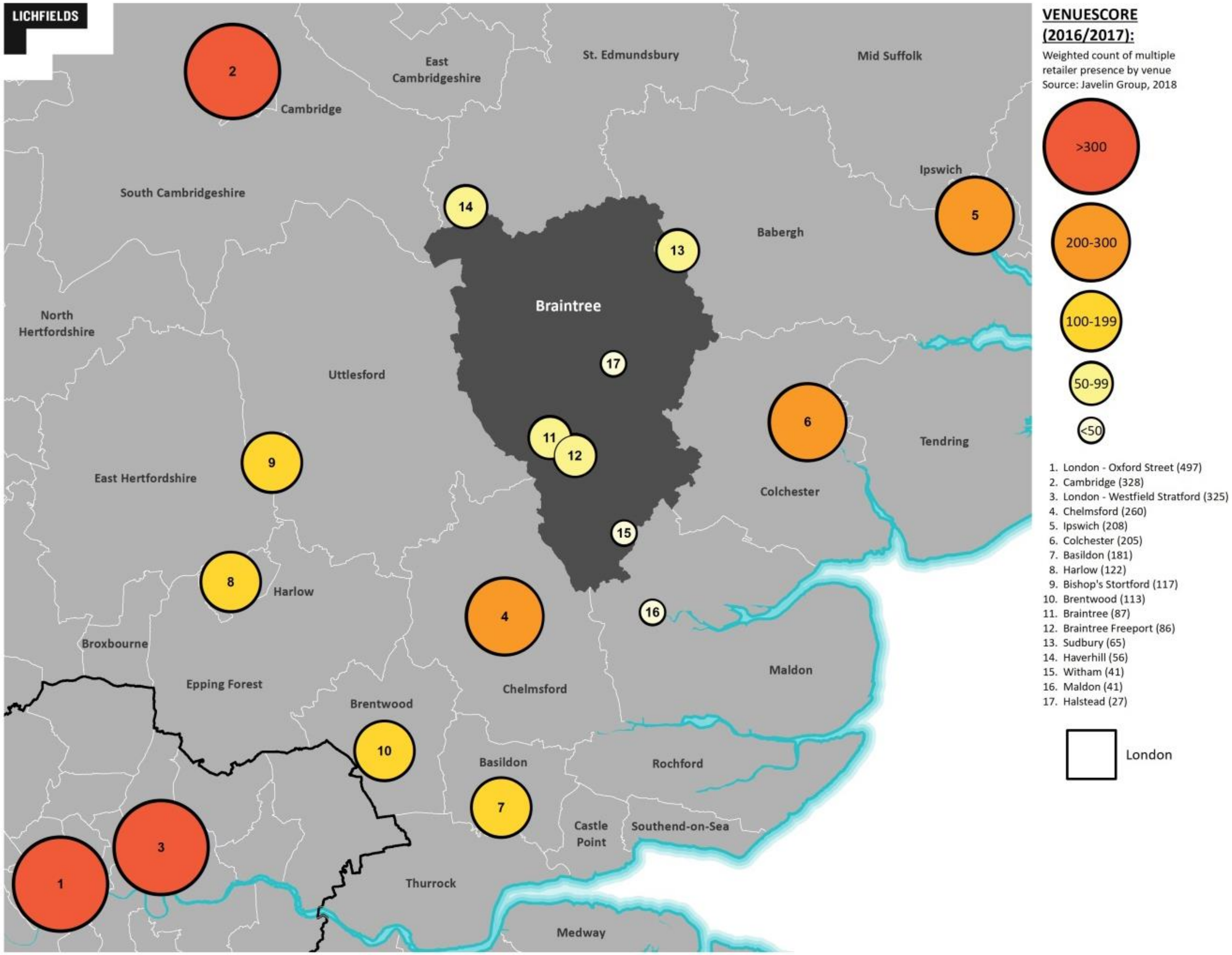
Centre	UK Rank 2016/17	Venuescore 2016/17	UK Rank 2013/14	Venuescore 2013/14
London – Oxford Street	10	497	6	457
Cambridge	23	328	34	278
London – Westfield Stratford	26	325	30	288
Chelmsford	43	260	72	199
Ipswich	75	208	58	214
Colchester	76	205	63	206
Basildon	100	181	87	182
Harlow	199	122	168	133
Bishop's Stortford	205	117	201	114
Brentwood	217	113	209	110
Braintree	**309**	**87**	**281**	**86**
Braintree Freeport	**312**	**86**	**320**	**77**
Sudbury	438	65	365	69
Haverhill	537	56	510	52
Witham	**754**	**41**	**681**	**39**
Maldon	754	41	864	31
Halstead	**1,187**	**27**	**1,155**	**23**

Source: Venuescore, Javelin Group 2017

2.9 Table 2.1 also provides a comparison between the latest (2016/17) Venuescore data and the previous figures from the 2015 Retail Study Update. While this information shows that Braintree, Witham and Halstead have all fallen slightly in the national rankings, the Venuescore of each centre has improved. The reason for the fall in rank may be due to other centres improving their offer to a greater degree and new centres being included in the dataset. The data does not necessary demonstrate in a decline of the centres in the District since 2015.

2.10 Figure 2.1 indicates that residents in Braintree District have good access to large regional centres (London, Cambridge, Ipswich, Colchester, and Chelmsford) as well as having a choice of smaller centres for day to day shopping needs. The outflow of retail expenditure from the District is relatively high, particularly for comparison goods, and is likely to remain high in the future, due to overlapping catchment areas.

Figure 2.1 Venuescore Shopping Hierarchy



Existing retail provision in Braintree District

2.11 A qualitative assessment of existing retail and service provision in the main centres is provided in the centre audits included in Appendix 6. A summary of existing retail provision in the main centres is provided in Table 2.2 below.

Table 2.2 Existing retail unit provision

Centre	Class A shop units	Convenience goods floorspace (sq.m net)	Comparison goods floorspace (sq.m net)
Braintree	258	7,520	14,276
Freeport/Braintree RP	108	573	21,955
Witham	152	3,027	6,885
Halstead	144	3,997	4,730
Total	**662**	**15,117**	**47,846**

Source: VOA, Goad and ORC StorePoint

2.12 The audit of centres in Appendix 6 confirms that Braintree town centre is the main shopping destination within the District, in terms of number of shop units and convenience floorspace, with Freeport/Braintree Retail Park providing the most comparison floorspace within the District.

2.13 Witham and Halstead are smaller centres, both similar in size in terms of number of shop units and the amount of retail floorspace. These two centres provide a reasonable range of shops and facilities that serve their settlements and nearby villages. They have a critical mass of convenience and comparison shopping floorspace and a good range of non-retail services.

2.14 Local centres generally include a small range of shops of a local nature, serving a small catchment. They can include a small supermarket, newsagent, post office, takeaways and pharmacy. Facilities at Coggeshall and Great Notley and other villages are limited and serve local catchment areas.

2.15 Based on the number, scale and type of shops and services available in Braintree, Witham and Halstead, these three centres should continue to be designated as town centres. Great Notley contains a large supermarket as well as a limited number of other services and Coggeshall is a village centre, providing a small range of uses.

2.16 National and local policy indicates that it is important for the District's town centres to maintain and strengthen their role in the retail hierarchy. The smaller centres should continue to perform a more local function meeting day to day shopping and service needs.

3.0 Assessment of retail need

Introduction

3.1 The National Planning Policy Framework (NPPF) indicates (paragraph 14) that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs.

3.2 The Planning Practice Guidance (PPG) indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses.

3.3 The PPG also introduces the requirement to consider a range of plausible scenarios, including a 'no development' scenario, which should not assume that all centres are likely to benefit from expenditure growth.

3.4 This section objectively assesses the quantitative and qualitative scope for new retail floorspace in Braintree District in the period from 2018 to 2033. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken as part of the town centre audits in Appendix 6.

Study area

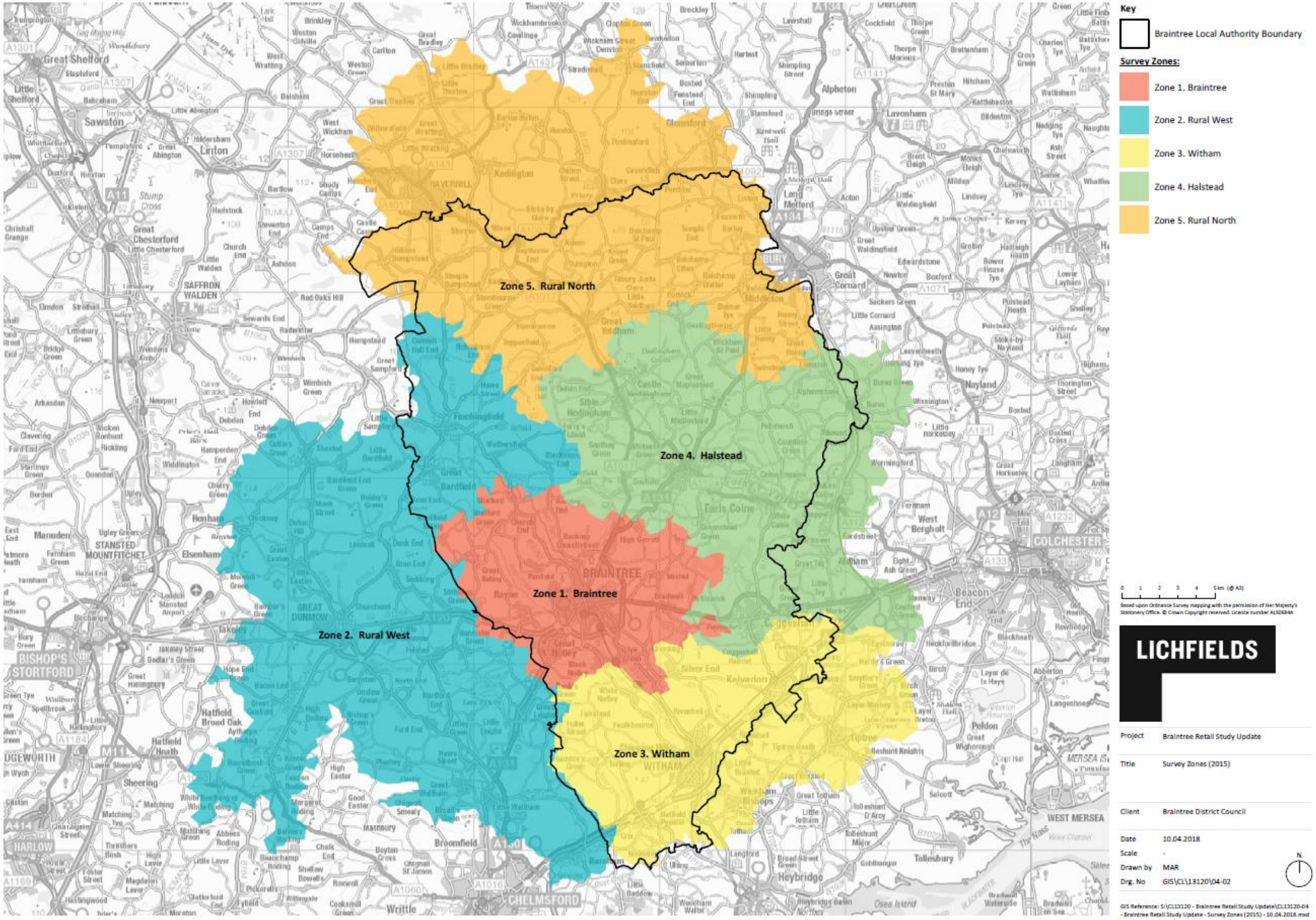
3.5 The quantitative analysis is based on a defined Study Area that covers the catchment areas of the main shopping destinations in the District. The zones are the same as those previously adopted in the 2015 Retail Study Update, which reflect the catchment areas of the centres within Braintree District.

3.6 The Study Area has been sub-divided into five zones as shown in Appendix 1 and Figure 3.1 overleaf. The survey zones are based on postcode sectors and take into consideration the extent of the primary catchment areas of the three main settlements of Braintree, Witham and Halstead.

3.7 The primary catchment areas are the area where each centre will attract the vast majority of its retail trade. There will be retail expenditure leakage from the study area zones to centres outside, but conversely expenditure inflow from surrounding areas.

3.8 The methodology adopted is set out in Appendix 1.

Figure 3.1 Braintree Study Area



Retail trends

3.9 The economic downturn had a significant impact on the retail and leisure sectors. A large number of national operators failed (eg. Austin Reed, BHS, Comet, HMV, JJB Sports, Jessops, Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, La Senza, Past Times, Barratts and Habitat), leaving major voids within centres and retail parks. The latest operators to experience difficulties include Carpetright, New Look, Toys R Us, Prezzo, Chimichanga, Strada, Byron and Jamie Oliver, which indicate that market conditions are still challenging.

3.10 Many town centre development schemes were delayed and the demand for traditional bulky goods retail warehouse operators has been affected. Even some of the main food store operators have seen a reduction in growth, with discount operators taking market share from the main operators.

3.11 Assessing future expenditure levels within this study needs to take into account the likely speed of the economic recovery, particularly in the short term (2018 to 2023). Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the plan period. This study takes a long term view for the plan period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered and a balanced approach taken. An overview of national trends within the retail sector is set out below.

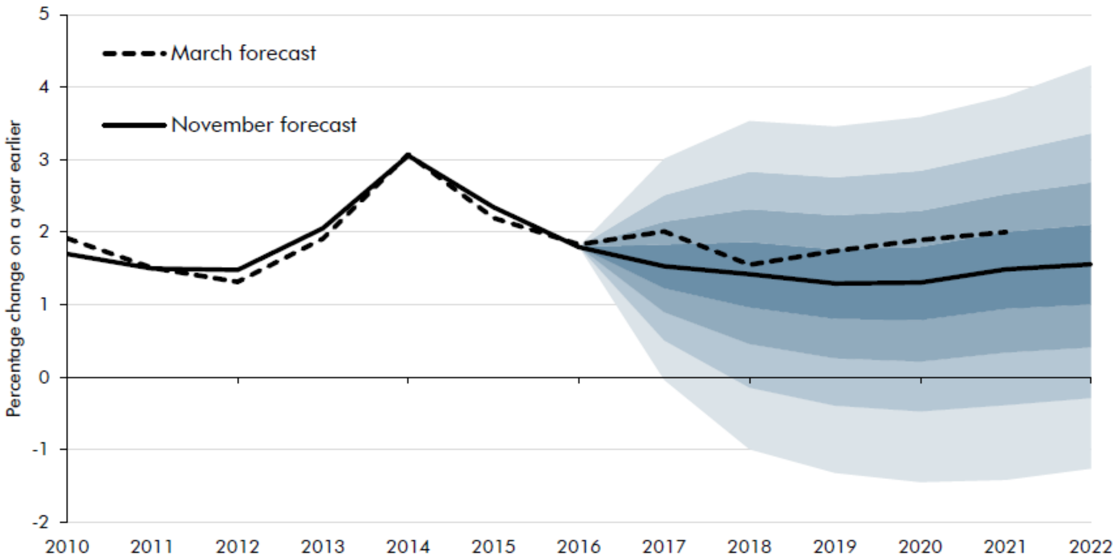
Expenditure growth

3.12 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However the impact of Brexit is expected to result in slower growth in the short term.

3.13 After the recession in 2009, growth resumed and from 2012 grew to the high of 3% in 2014 and 2% in 2015. The Office for Budget Responsibility's (OBR) latest (November 2017) figures for GDP show that real GDP growth averaged 0.3% a quarter in the UK in the first three quarters of 2017, down from 0.5% in the second half of 2016. OBR's March 2017 forecasts assumed that real GDP growth would slow in the second quarter of 2017 as higher inflation squeezed real incomes. The latest ONS data however indicates that this slowdown came in the first quarter of 2017 – one quarter earlier than assumed in March 2017, but one quarter later than assumed in the November 2016 forecast. Real GDP growth was therefore slightly weaker over the first half of 2017 than expected in March 2017.

3.14 The average GDP growth in 2017 was 1.6%. The average forecast for GDP growth in 2018 is 1.4%, increasing to 1.7% in 2019 and 2% in 2020. The blue shading in Figure 3.2 shows 20% probability bands around the projection line.

Figure 3.2 Real GDP Growth Fan Chart (November 2017)



Source: OBR Economic and Fiscal Outlook – November 2017

3.15 In the past, expenditure growth has fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The speed of recovery from the last economic downturn has been slow. The high pre-recession growth rates are unlikely to be achieved in the short term, but the underlying trend over the medium and long term is expected to lead to a need for further modern retail floorspace, even allowing for continued growth in home shopping and turnover efficiencies. These national trends are anticipated to be mirrored in Braintree District.

3.16 For convenience goods, Experian's forecasts (December 2017) anticipate limited growth (0.1% per annum) from 2020. For comparison goods, higher levels of growth are expected in the future (3.2% per annum from 2020), still at a lower rate than previous pre-recession trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.

3.17 Experian's latest expenditure projections take into account the implications of Brexit, indicating this has created major uncertainties regarding the long term outlook for the UK economy. Experian's baseline forecasts reflect a small downgrade in the UK's long term projections for trade, investment and GDP. However the revisions to the consumer spending forecast are minimal, with long term growth expected to remain around 2.2% to 2.3%, underpinned by rises in population and household incomes. Experian Retail Planner Briefing Note 15 (December 2017) states:

"The expansion in comparison goods volumes, averaging 3.2% per head to 2036, will be less buoyant than in the three decades to 2015 as key factors that boosted growth, notably the globalisation that subdued audio-visual prices significantly, will not be repeated to the same degree.

Convenience goods enjoyed the strongest rise in the decade during 2016, buoyed by the overall buoyancy in spending. Growth has since slowed but remains above the long term trend over the period 1997 to 2015 averaging – 1.2% per head a year. Our central forecast has a renewed squeeze in convenience goods in the short term, before sales per head growth settles at 0.2% a year from 2020 to 2036."

3.18 Low expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street in the last few years. As a result of these trends, the national average shop vacancy rate (based on Goad plan data) has increased from around 10% in 2005 to circa 14% in 2012. Vacancy rates have gradually recovered to 11.2% in 2017.

3.19 The most recent land use data available from Experian Goad indicates there were 55 vacant Class A1-A5 shop units within Braintree, Witham and Halstead town centres. This equates to an overall vacancy rate of 9.9%, which is lower than the Goad national average of 11.2% (2017). Halstead has the highest vacancy rate (just over 13%), above the national average. Overall the vacancy figures suggest centres in the District are performing satisfactorily despite challenging market conditions.

New forms of retailing

3.20 New forms of retailing (multi-channel shopping) have continued to grow. Home/electronic shopping has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect/click and return shopping has become more popular. The future growth of multi-channel retailing including home computing, internet connections and interactive TV will continue to have an effect on retailing in the high street and from traditional stores. Trends within this sector will have implications for retailing within Braintree, because they will affect the amount of expenditure growth that will be potentially available to support development and the strength of operator demand for new floorspace.

Special forms of trading/home shopping

3.21 Recent trends suggest continued strong growth in this sector. Experian's Retail Planner Briefing Note 15 (December 2017) states:

"The strong increase in online shopping in the past decade has lifted the share of special forms of trading (SFT) to a level where it now accounts for close to 16.5% of total retail sales ...

... The rising share of internet sales in total retail transactions dominates the picture of SFT. Based on data for the first ten months of the year, internet sales' share of total retail is expected to come in at roughly 14% in 2017, against 4.7% in 2008.

... non-store retailing continues to grow rapidly, outpacing traditional forms of spending. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the long term. According to Internet World Stats there, as of June 30 2017, there were an estimated 62.1 million internet users in the UK (representing 94.8% of the population). Growth of the internet user base will thus be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2022. Our forecast has the SFT share of total retail sales reaching almost 20% by 2022 rising to 20.5% by the mid-2030s."

3.22 This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

3.23 The implications of these trends on the demand for retail space have been carefully considered. Some retailers operate online sales from their traditional retail premises e.g. food store operators and click and collect operations, therefore growth in online sales may not always mean there is a reduction in the need for retail floorspace.

3.24 Given the likelihood that multi-channel shopping is likely to grow at a faster pace than total retail expenditure, the retail capacity assessment adopts relatively cautious growth projections for retail expenditure and an allowance has been made for retailers to increase their turnover density, due to growth in home shopping and click and collect.

Food store operators

3.25 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/ Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food formats).

3.26 The number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. Taking Sainsbury's as an example, data provided by Mintel indicates that the number of Sainsbury's Local stores increased by 88% between 2011 and 2015, compared to the number of larger format stores which increased by 37% over the same period. The number of Little Waitrose trebled between 2011 and 2015.

3.27 A number of proposed larger food stores have not been implemented across the country. There has been a move away from larger stores to smaller formats, reflecting changes in customer's shopping habits.

3.28 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. This trend is evident in Braintree District with Lidl and Aldi stores recently opening in Halstead and Witham. The Morrisons store in Braintree town centre has also been replaced by a B&M Bargains store. The discount sector is actively expanding and Aldi/Lidl may look for further opportunities in Braintree District in the future.

Comparison retailers

3.29 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including a number of mergers and failures, and scaled down store sizes. Other traditional high street retailers often seek large out-of-centre stores, for example Boots, Next, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct have also expanded out-of-centre. This is evident in Braintree District, with a current application to expand the Next store at Braintree Retail Park. Braintree District also has the significant and unique comparison goods offer from the various outlet stores within Freeport.

3.30 The demand for premises within the bulky goods sector, ie. furniture, carpets, electrical and DIY goods, has been particularly weak in recent years. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. The retail warehouse sector is reasonably well represented in Braintree, and the recent permission for a new B&Q store on Millennium Way suggests there is continued demand for retail warehouse premises in the District.

3.31 Within town centres, many high street multiple comparison retailers have changed their format. For over a decade, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation of activity into the larger national, regional and sub-regional centres. In general operator demand for space has decreased during the recession and, of those national multiples looking for space, many prefer to locate in larger centres, such as Braintree. Much of the occupier demand in smaller centres has come from the discount and charity sectors or non-retail services, rather than higher order comparison goods shopping.

3.32 The continuation of these trends will influence future operator requirements in Braintree District with smaller vacant units becoming less attractive for new multiple occupiers, and retailers increasingly looking to relocate into larger units. However, smaller vacant units could still be attractive to independent traders and non-retail services.

Charity and discount shops

3.33 The charity shop sector has grown steadily over the past 20 years and there is no sign this trend will end. In many centres, charity shops have occupied vacated shop premises during the recession. Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It therefore does not follow that these charity shops will be replaced by traditional shops when the market recovers, particularly in secondary retail frontages.

Non retail services

3.34 The growth of money lending/pay day loan shops, betting shops and hot food takeaways has also raised concerns amongst local planning authorities, and has resulted in a change to permitted development rights in order to control the growth of these uses in town centres.

3.35 Recent changes to the GPDO may also have an impact on town centres. These measures allow for greater flexibility for changes of use from retail to non-retail uses eg. Class A uses to C3 residential use and Class A1 uses to Class A2 uses. These measures could change the composition of town centres; in particular the amount of Class A1 space could reduce. The measures may lead to a reduction in vacant shop premises, particularly in peripheral shop frontages. Conversely, it could have an impact on the ability of operators to find space, in areas where demand is higher.

3.36 In our view it is unlikely that these temporary changes will have a significant impact on Braintree or Witham town centres, where the current vacancy rates are relatively low. Halstead may be an exception to this as the vacancy rates is slightly higher than the national average.

3.37 These trends are not new and have been affecting the high street for many years. In response to these trends, town centres have changed and diversified. The food and beverage, leisure and non-retail service sectors have been successful in occupying space no longer attractive to retail tenants. There have been cyclical trends in vacancy rates reflecting the macro economic trends, but in most cases, town centres recovered during periods of stronger growth. The High Street is more resilient than many commentators give it credit.

3.38 Shopping behaviour will continue to change and the high street will need to continue to respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience. There will always be demand for a day out.

Population and expenditure

3.39 The District's projected population for 2011 to 2033 is set out in Table 1 in Appendix 2. Population data has been obtained from Experian for each zone based on the 2011 census. The 2011 base year population has been projected to 2033 based on the ONS 2014-based subnational population projections.

3.40 Table 2 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2033. Forecasts of comparison goods spending per capita are shown in Table 2 in Appendix 3.

3.41 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 10% from £549.62 million in 2018 to £605.86 million in 2033, as shown in Table 3 (Appendix 2).

3.42 Comparison goods spending is forecast to increase by 71% between 2018 and 2033, increasing from £835.73 million in 2018 to £1,429.60 million in 2033, as shown in Table 3 (Appendix 3).

3.43 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on food and drink does not increase proportionately with disposable income, whereas spending on non-food goods is more closely linked to income.

3.44 These figures relate to real growth and exclude inflation.

Existing retail floorspace

3.45 Existing convenience goods retail sales floorspace within Braintree District is around 29,200 sq.m, as set out in Table 9 in Appendix 2. This floorspace figure excludes comparison sales floorspace within food stores. Comparison goods retail floorspace (including comparison sales in large food stores) within Braintree District is estimated to be around 50,600 sq.m net, as shown in Table 9 in Appendix 3.

Existing spending patterns

3.46 The results of the household shopper questionnaire survey undertaken by NEMS in October 2015 have been used to estimate existing base year shopping patterns within the study area zones.

Convenience shopping

3.47 The results of the household shopper survey relating to main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 2. The market shares in Table 4 are a combined rate for both main and top up shopping based on a 70:30 split between main and top up shopping.

3.48 The survey results (Table 4, Appendix 2) indicate there is a good retention of main food and grocery shopping trips within the Braintree (almost 94%) zone, with medium levels of retention in Witham (59.6%) and Halstead (51.0%) zones.

3.49 Rural West and Rural North zones have low retention rates, and residents in these zones primarily visit large food stores within centres just beyond the District boundary.

3.50 Residents in the west of the district have access to food stores in Great Dunmow and Chelmsford and in the north of the District they have access to stores in Sudbury and Haverhill.

3.51 Table 4 (Appendix 2) indicates the proportion of convenience goods expenditure within each zone retained within Braintree District ranges from just 5.2% in Zone 5 (Rural North) up to 93.8% in Zone 1 (Braintree). The influence of stores outside the District is clearly evident, particularly stores in Chelmsford, Colchester, Great Dunmow and Haverhill.

3.52 The level of convenience goods expenditure attracted to shops/stores in Braintree District in 2018 is estimated to be £279.13 million as shown in Table 5, Appendix 2. This includes estimates of inflow from beyond the study area, applying the market shares set out in Table 4.

3.53 The total benchmark turnover of identified existing convenience sales floorspace within Braintree District is £301.21 million (Table 9, Appendix 2).

3.54 These figures suggest that convenience goods retail sales floorspace in the District is collectively trading marginally (7%) below average. Facilities appear to be trading above average in the Braintree zones, whilst facilities in the Halstead and Witham zones are below average. The below average trading performance in these areas is partly due to the recent opening of the new Lidl and Aldi stores in the Halstead and Witham zones respectively.

3.55 On balance the estimate of global expenditure deficit (£22.08 million) within Braintree District as a whole is relatively small, i.e. the difference between the actual spending at retail facilities in the District and the benchmark turnover of the facilities.

Comparison shopping

3.56 Table 4 (Appendix 3) indicates the proportion of comparison goods expenditure within each zone that is spent within Braintree District ranges from only 5.2% in Zone 5 (Rural North) up to 43.6% in Zone 1 (Braintree). The retention of comparison goods expenditure is generally lower than for convenience goods. This reflects the propensity of customers to do food and grocery shopping locally whilst for comparison shopping, customers are more likely to shop around and/or travel longer distances to visit larger centres that have more choice. The ability to increase comparison goods market share will be constrained by larger centres in the sub-region. Expenditure outflow will also be affected by out-commuting from the District.

3.57 The estimated comparison goods expenditure currently attracted by shopping facilities within Braintree District is £242.12 million in 2018, as shown in Table 5, Appendix 3. This includes estimates of inflow from beyond the District area.

3.58 Based on this expenditure estimate, the average sales density for existing comparison goods sales floorspace in the District (50,601 sq.m net) is £4,784 per sq.m net. The analysis of existing comparison shopping patterns in 2018 suggests the following average sales density figures for the centres in Braintree District shown in Table 3.1.

Table 3.1 Comparison goods average sales densities

Centre	Average sales density 2018 (£ per sq.m net)
Braintree Town Centre	£6,096
Freeport/Braintree Retail Park	£5,166
Witham	£2,455
Halstead	£2,514
Average	**£4,784**

3.59 Trading levels vary significantly across the District. The relatively high sales density for Braintree and Freeport/Braintree Retail Park reflects the stronger presence of national multiples and the town destination's higher position in the shopping hierarchy. The smaller centres generally have a lower trading density, which reflects the predominance of independent traders.

3.60 The 2015 Study Update indicated that the 2015 base year level of comparison goods expenditure attracted to Braintree District was £229.37 million (adjusted for 2016 prices). The updated 2018 figure in 2018(£242.12 million) suggests available expenditure has increase in real terms 5.6% between 2015 and 2018, just under 2% per annum, which is a reasonable level of growth for increased in turnover efficiency for comparison goods floorspace.

3.61 There is no evidence to suggest existing comparison sales floorspace is under or over-trading in the District, or that there is surplus comparison expenditure available to support new development at present. Existing floorspace appears to be trading satisfactorily in difficult market conditions.

Capacity for convenience goods floorspace

3.62 As a minimum it is appropriate and realistic to plan to maintain the District's market share of convenience goods expenditure in the future. Planning for a decline in market share may be unsustainable and would not address the needs of local residents. It should be noted that as the forecast increase in internet spending is taken into account in projecting available expenditure in the future, this will have the effect of reducing the actual requirement for additional floorspace.

3.63 Based on constant market shares and baseline population projections, the future level of available convenience goods expenditure at 2023, 2028 and 2033 is shown at Tables 6, 7 and 8 in Appendix 2.

3.64 The total level of convenience goods expenditure available for shops in the District between 2018 and 2033 is summarised in Table 12 (Appendix 2). Convenience expenditure available to shopping facilities in the District is expected to increase from £279.13 million in 2018 to £308.31 million in 2033.

3.65 Table 10 subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further development. We understand there are no significant planned convenience goods commitments in the District based on information provided by Braintree District Council. Since the 2015 Study Update, the previously identified proposals have been implemented. These include a new Aldi store (964 sq.m net convenience floorspace) on Land south of Maltings Lane, Witham and a new Lidl store (924 sq.m net convenience floorspace) at the EMD site in Halstead.

3.66 Largely as a result of these new food stores in Witham and Halstead, within the District as a whole, there is a deficit of expenditure of -£22.08 million convenience goods expenditure in 2018. This deficit decreases until there is a small surplus of available expenditure of £7.10 million in 2033 in the District. Table 10 shows that there is a surplus of available expenditure in the Braintree zones.

3.67 The expenditure projections have been converted into potential new floorspace estimates in Table 11. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £12,000 per sq.m. This figure is based on an approximate average turnover of the main food supermarket operators (Asda, Morrison's, Sainsbury's, Tesco and Waitrose) because new floorspace is likely to be provide by these operators rather than small independent convenience shops.

3.68 The capacity figures up to 2028 suggest that there is no requirement for any additional convenience goods floorspace in the District as a whole. There may be some rebalancing of spending patterns across the District, with some of the spending from the Braintree zones being attracted to facilities elsewhere in the District, particularly following the closure of the Morrisons in Braintree and the attraction of the new Aldi and Lidl stores. If there is no rebalancing, then the available convenience goods expenditure in the Braintree zones could support a moderate amount of additional floorspace, 2,049 sq.m net (2,927 sq.m gross). This represents a medium sized supermarket, similar in size to the Co-op in Halstead.

Capacity for comparison goods floorspace

3.69 The household survey suggests that the District's retention of comparison goods expenditure is generally lower than for convenience goods. The lower level of comparison expenditure retention is due to the strength of competing comparison goods facilities in nearby authorities, in particular Chelmsford, Colchester, Cambridge, Sudbury and Lakeside.

3.70 Future improvements to comparison retail provision within the District could help to claw back some additional expenditure leakage from the District. However major developments in neighbouring authorities, e.g. expansion recently permitted at Tollgate Village in Colchester will limit the ability of shopping facilities in the District to increase their market share of expenditure.

3.71 Some retail development will be necessary in Braintree District in order to prevent market shares falling significantly in the future. An appropriate strategy for Braintree District should be to seek to prevent market shares falling significantly, in the face of increasing future competition in nearby centres, whilst maintaining the vitality and viability of centres.

3.72 The Council should plan to protect the existing role of centres, recognising these centres fall within the catchment area of higher order regional and sub-regional centres. The centres in Braintree District will maintain a complementary role supporting these larger centres.

3.73 Based on the baseline population projections, available comparison goods expenditure has been projected forward to 2023, 2028 and 2033 in Tables 6, 8 and 9 in Appendix 3, and summarised in Table 11. Available comparison expenditure to facilities within the District is expected to increase from £242.12 million in 2018 to £284.98 million in 2023, £345.21 million in 2028 and to £415.85 million in 2033.

3.74 For the purposes of this assessment, the existing comparison goods floorspace is estimated to be trading at equilibrium in 2018 (ie. satisfactory levels), as shown in Table 11 (Appendix 3). Table 11 assumes that the turnover of comparison floorspace will increase in real terms in the future, as recommended by Experian, and this growth is required to maintain the health and viability of town centres. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

3.75 Retail commitments and proposals are added in at 2023, as set out in Table 10 of Appendix 3 and summarised below.

3.76 Planning permission was granted in September 2017 (LPA ref. 13/01476/FUL) for the erection of a new B&Q retail warehouse on Millennium Way, Braintree. This would replace the existing B&Q store on Braintree Retail Park, that would be available for alternative retail operators and potentially an uplift in turnover. There is a proposal to extend the existing Next store in Braintree Retail Park (LPA ref. 17/01799/FUL), which has been granted planning permission subject to a S106 agreement. These commitments and proposals are estimated to have a combined turnover of £18.46 million in 2018.

3.77 Within Braintree District as a whole, in 2023 there is a small deficit of £1.57 million, due to the inclusion of the above commitments. By 2028, this becomes a surplus of £25.40 million, which will increase to £59.28 million by 2033.

3.78 Surplus comparison expenditure has been converted into net comparison sales floorspace projections at Table 12 in Appendix 3, adopting an average sales density of £6,000 per sq.m in 2018, which is projected to grow in the future due to improved turnover efficiency. The surplus expenditure at 2033 could support 7,220 sq.m net of sales floorspace (10,315 sq.m gross) in the District.

Qualitative need for retail floorspace

3.79 Qualitative need can be assessed through consideration of the following factors:

- deficiencies or 'gaps' in existing provision;
- consumer choice and competition;
- overtrading, congestion and overcrowding of existing stores;
- location specific needs such as underserved markets; and
- the quality of existing provision.

Convenience goods shopping

3.80 The household survey results indicate that most residents in the study area undertake both a main shopping trip and top-up shopping trips. Main shopping trips are generally made once a week or less often, and the household survey identified that 89% of respondents travel to do their main food shopping by car (both driver and passenger). The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large supermarkets or superstores are the usual destination for these types of shopping trip.

3.81 There are six large food stores of over 2,000 sq.m net within the District, ie. Tesco, Marks Farm, Braintree (3,669 sq.m net), Tesco, Market Place, Braintree (2,936 sq.m net), Tesco, Great Notley (2,873 sq.m net), Sainsbury's, Tofts Walk, Braintree (2,800 sq.m net), Morrisons, Witham (2,578 sq.m net), and Tesco, Witham (2,313 sq.m net). These large stores are supported by a number of smaller supermarkets. Large stores located in Great Dunmow, Chelmsford, Colchester and Haverhill help to serve the rural parts of the District.

3.82 The discount food sector is represented in the District, with a Lidl store located in Braintree and the new Lidl and Aldi in Halstead and Witham respectively. B&M Bargains also operate a store in Braintree town centre, which has replaced the Morrisons store.

3.83 Existing facilities offer a good range and choice of products for bulk and top up food shopping.

3.84 The capacity projections in Table 10 in Appendix 2 suggest there is no available expenditure to support additional food stores in Witham or Halstead over the period to 2033, but there may be scope for an additional medium sized store in Braintree.

3.85 In qualitative terms the provision of food stores is particularly strong in the south of the District, particularly in the Braintree area. Residents also have access to large food stores in neighbouring authorities.

3.86 The qualitative and quantitative assessment suggests the priority for improved convenience goods provision should be within Braintree.

Comparison goods shopping

3.87 Braintree and Freeport/Braintree Retail Park are the main comparison shopping destinations within the District. All centres in Braintree District are smaller than larger centres surrounding the District, in particular Ipswich, Colchester, Chelmsford, Basildon, Harlow and Bishop's Stortford which are accessible to residents within the District and have a more extensive range of multiple retailers.

3.88 The centre audits in Appendix 6 indicate that Braintree has a higher proportion of comparison retail units compared to the national average. Witham has a proportion of comparison retail units comparable to the national average while Halstead has a lower proportion. Comparison retailers in other centres are predominantly small independent traders. Witham is ranked higher than Halstead in Venuescore's national rank as shown in Table 2.1, because it has more national multiples and larger shop units. The two town centres are similar in size in terms of comparison sales floorspace but are relatively small town centres in the sub-region.

3.89 Braintree (90 comparison shops) has representation in all but one comparison goods categories, but there is generally a limited choice of outlets within some specialist categories.

3.90 The clothing and footwear sector is under represented in Braintree with only 12 shops. Braintree has a reasonable mix of lower and higher order comparison goods. Lower order comparison goods are items bought on a regular basis, where customers are less likely to shop around or travel long distances to shop. Higher order goods tend to be higher value items bought occasionally, where customers window shop and compare prices and goods. Healthy town centres usually have a good mix of higher and lower order comparison goods shops. Braintree has a relatively high proportion of charity shops.

3.91 There is a more limited range and choice of comparison shops in Witham and Halstead, with limited choice within some goods category. Witham has a larger selection of comparison shops (49) but both centres have a lower than average proportion of clothing and footwear shops, and the comparison retail offer is dominated by independent shops.

4.0 Requirements for other town centre uses

Introduction

4.1 This section assesses the potential for commercial leisure and other town centre uses in Braintree District, including cinemas, tenpin bowling, bingo, theatres, nightclubs, private health/fitness suites and catering, pubs and bars.

Food and beverage uses

4.2 Service uses perform an important role in the overall offer of a centre, and encourage customers to shop locally. The service uses are categorised as follows:

- **Class A1 services** cover a range of uses, including hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as Class A3), funeral parlours and post offices.
- **Class A2 services** include banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies.
- **Class A3/A5** including restaurants, cafes (A3) and takeaways (A5).
- **Class A4** pubs/bars (Class A4).

4.3 Food and beverages is a fast moving and creative sector, with a steady flow of new concepts emerging. Within this sector there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage. These types of food and drink operators (Class A3 and A4) i.e. restaurants, bars and pubs have supported other major leisure uses, in particular cinema developments. Within town centres, the demand has increased, including a significant expansion in the number of coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains have invested heavily and not exclusively in larger centres. Themed restaurants have also expanded rapidly.

4.4 The key categories for food and beverage offers are:

- **Impulse**: characterised by their produce range that is typically highly visual and hand-held so that it can be eaten “on the go”;
- **Speed eating fast food**: food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
- **Refuel and relax**: a drink, snack and a short break in a pleasant environment rather than focusing on eating a main meal; and
- **Casual dining/leisure dining**: incorporating a number of food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

4.5 Food and beverage establishments (Class A3, A4 and A5) including restaurants, bars, pubs and takeaways have supported other major leisure uses on leisure and retail parks and are important services within town centres. National information available from Experian Goad indicates that the proportion of non-retail uses within town centres across the country has increased significantly.

Food and beverage expenditure

4.6 Experian's food and beverage expenditure per capita projections are shown in Table 2, Appendix 4. The total food and beverage expenditure in the study area is £295.24 million in 2018, as shown in Table 3, Appendix 4.

4.7 Food and beverage expenditure per capita is expected to increase in real terms (excluding inflation) by 19% between 2018 and 2033. Taking into account population growth, total food and drink expenditure within the study is expected to increase from £295.24 million in 2018 to £388.51 million by 2033, an increase of 32% (Table 3, Appendix 4).

Food and beverage expenditure patterns

4.8 Existing food and beverage expenditure patterns have been modelled based on the 2015 household survey results within the study area zones. Base year (2018) penetration rates are shown in Table 4, Appendix 4 and expenditure patterns are shown in Table 5, Appendix 4. The estimated expenditure currently attracted to facilities within Braintree District is £169.93 million in 2018.

4.9 The retention rate in Braintree District is reasonably high at around 52%. An appropriate strategy for Braintree District should be to maintain this existing market share. The capacity projections in Appendix 4 are based on this approach.

4.10 Available food and beverage expenditure has been projected forward to 2033 in Tables 6 to 8. Existing facilities are expected to increase their turnover by 1% per annum. Future available expenditure is compared with the projected turnover of existing facilities in Table 10 in Appendix 4. Surplus expenditure has been converted into floorspace projections in Table 11, Appendix 4, using an average sales density of £5,000 per sq.m, inflated by 1% per annum. The floorspace projections are broken down in Table 4.1.

Table 4.1 Summary of food and beverage floorspace projections (sq.m gross)

Centre	Additional floorspace (sq.m gross)		
	By 2023	By 2028	By 2033
Braintree	618	1,323	2,010
Freeport/Braintree Retail Park	206	443	674
Witham	317	683	1,039
Halstead	238	514	783
Braintree District Total	**1,379**	**2,962**	**4,506**

Source: Table 11, Appendix 4

Other Class A1 and A2 service uses

4.11 The retail, food and drink floorspace projections do not include non-retail Class A1 services or Class A2 services. Based on the Goad national average, one would expect around 20% of shop premises to be occupied by these uses within centres, or about 10% of total floorspace.

Commercial leisure uses

4.12 Residents in Braintree District have relatively good access to a range of commercial leisure and entertainment facilities both within the District and in neighbouring authorities, where most of the key sectors are represented.

4.13 Based on Lichfields' experience and household surveys from across the country, commercial leisure facilities usually draw the main part of their trade from residents up to a 20 minutes travel time. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres and family entertainment centres require a large catchment population, and often benefit from locating together or on large out of centre leisure parks.

4.14 Braintree District's population has good access to leisure facilities in nearby larger centres of Chelmsford and Colchester, and also good public transport access to Central London. The proximity of major leisure facilities in these surrounding local authorities may limit the potential for major commercial leisure facilities.

Cinemas

4.15 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s, but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions in 2016 were 168.3 million. Cinema trips have plateaued since 2002, despite population growth of 9.6% during this period (59.4 million to 65.1 million). The 2016 national average was 2.6 trips per person per annum.

4.16 The Cinema Advertising Association identities 771 cinema facilities with 4,115 screens. Lichfields' national CINeSCOPE model identifies approximately 800,000 cinema seats in the UK. The CINeSCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, in order to identify areas of under and over-provision. The national average is about 40,000 cinema trips per screen per annum or 210 trips per seat per annum.

4.17 The only mainstream cinema within Braintree District is the Cineworld at Braintree Retail Park. This cinema has 12 screens and 2,100 seats.

4.18 In total, around 65% of respondents to the household survey results visit the cinema, and of these, 66% visited the cinema in Braintree. Haverhill (17%), Colchester and Chelmsford (each 3%) were the other main cinema destinations.

4.19 The capacity for cinema seats within Braintree District is calculated in Appendix 5. The study area population in 2018 (255,141 people) will generate 663,366 cinema trips per annum, based on the national average visitation rate (2.6 trips per annum). The market shares estimated from the household survey suggests about 453,801 of these cinema trips will be attracted to the cinema in Braintree, or 648,287 trips allowing for 30% inflow (see Tables 2 to 4 in Appendix 5).

4.20 Based on the national average population per cinema screen (40,000 people per screen) and per cinema seat (210 people per seat), 648,287 trips generates demand for 16 cinema screens or 3,087 cinema seats. The existing cinema in Braintree has 12 screens and 2,100 seats. These figures suggest that there is an existing under-supply of four screens or 987 seats in Braintree District (see Tables 8 and 9 in Appendix 5).

4.21 The number of trips generated by the study area population at 2023, 2028 and 2033 is shown in Tables 5 to 7 in Appendix 5. The number of trips attracted to Braintree District is expected to increase from 648,287 in 2018 to 723,265 in 2033.

4.22 Based on the national average visitation rate, the study area population at 2033 could generate demand for 18 cinema screens or 3,444 cinema seats within Braintree District. This suggests that there is theoretical capacity for a medium sized cinema (5-6 screens) in Braintree District over the plan period. However proposed new cinemas in Colchester include a Curzon boutique 3 screen cinema in the town centre and a Cineworld 12-screen IMAX multiplex cinema at Colchester's Northern Gateway. Another multiplex cinema has planning permission at Tollgate Village. If implemented, these cinemas will reduce Braintree's market share of cinema trips, particularly in zones 3 and 4, which is likely to remove the capacity for a new cinema in the District.

Theatres

4.23 In total 48.5% of respondents to the household survey indicated that they visit the theatre. When asked where they had lasted visited the theatre, Central London/West End (60.7%) was the most popular location, followed by The Mercury Theatre in Colchester (10.5%) and The Civic Theatre in Chelmsford (8.5%). Within Braintree District, a limited number of households visited the Empire Theatre in Halstead (0.8%), Witham Public Hall (0.9%) and Braintree Arts Theatre (0.4%). Other theatres were mentioned in Ipswich, Bury St Edmunds, Sudbury and Southend-on-Sea.

4.24 Data from the British Theatre Consortium, British Theatre Repertoire (2014) indicated British theatres presented 59,386 performances attracting over 33 million theatre visits, around 121,000 visits per venue (274 venues with SOLT/UK Theatres membership).

4.25 Assuming an average of 0.5 trips to the theatre per person per annum, as implied by the British Theatre Consortium data, the study area population in 2018 (255,141 people) generates 127,570 theatre trips per annum. The household survey results suggest most of these trips will be attracted to Central London, with only a small number trips retained in the District. The study area population at 2033 (283,112) could generate 141,556 trips, an increase of just under 14,000 trips, but based on current market shares, only a small proportion of these additional trips are likely to be retained in the District.

4.26 There is no clear need for additional theatre provision in Braintree District.

Private health and fitness clubs

4.27 The 2016 State of the UK Fitness Industry Report reveals that the UK health and fitness industry is continuing to grow. It has more clubs, more members and a greater market value than ever before. The 2016 report highlighted that the industry experienced growth over the twelve month period to the end of March 2016, with an increase of 5.3% in the number of memberships.

4.28 The household survey indicates that 27.3% of respondents or their families visit health/fitness clubs. Of the participating households, around 42% visit health and fitness facilities within Braintree District.

4.29 The latest Sport England/Active Places data indicates there are 16 health and fitness suites in the District, of which three are for school's private use only. These private use facilities are relatively small, with 34 fitness stations in total.

4.30 The 13 suites open to the general public (including registered members) have 574 fitness stations in total, as shown in Table 4.2 overleaf.

4.31 Braintree District's population is around 154,100 in 2018, and is forecast to grow to around 170,400 in 2033. Braintree District currently has 3.95 fitness stations per 1,000 people (608 stations in total, including private use school facilities).

4.32 The East of England region has 739 Sport England registered health and fitness suites (153 private, 409 registered members only, 36 sports club/community association and 141 pay and play) with 38,495 fitness stations (average of 52 stations per suite). This existing provision equates to 6.17 fitness stations per 1,000 people, based on an estimated population of around 6.23 million in 2018.

Table 4.2 Health and Fitness Clubs (Sport England/Active Places Data, 2018)

Name	Type	No. Fitness Stations
Bannatyne Health Club (Braintree)	Registered Members	93
Benton Hall Golf And Country Club	Registered Members	60
Braintree Sport & Health Club	Registered Members	60
Braintree Swimming & Fitness	Pay and Play	30
Complete Health & Fitness	Pay and Play	70
DS Fitness Experience Ltd (Witham)	Registered Members	50
Earls Colne Recreation Club	Pay and Play	12
Fitness Factory Gym (Witham)	Registered Members	17
Halstead Leisure Centre	Registered Members	42
Notley Sports Centre	Registered Members	13
Prested Hall Hotel & Sports Club	Registered Members	32
The Essex Golf & Country Club	Registered Members	50
Witham Leisure Centre	Pay and Play	45
Total		**574**

Source: Sport England Active Places

4.33 Braintree District has a lower provision of fitness stations (3.95 per 1,000 people) than the regional average (6.17 stations), which suggests health and fitness clubs could be trading above average and an existing under supply of fitness stations. The existing shortfall is 343 stations (ie. need for 951 stations compared with the existing supply of 608 stations).

4.34 However the household survey results indicate that a significant proportion of trips to health and fitness facilities go to neighbouring authorities including Chelmsford, Colchester and Uttlesford. For the study area as a whole (with a population of 255,141 in 2018) applying the regional average would generate a requirement for 1,576 fitness stations. The household survey indicates that Braintree District attract 42% of fitness trips, which would suggest that there is a need for 662 stations within the District, based on the current retention levels. This suggests that there is a current shortfall of 54 stations within Braintree District, rather than 343 stations.

4.35 By 2033, the study area population is forecast to increase by 27,971, which could generate a need for a further 173 stations in the study area. Using the same 42 market share, this equates to a further 73 additional stations in Braintree District.

4.36 The forecast shortfall suggests that there is existing capacity for one or two medium-large sized health and fitness facilities in the District over the plan period.

Tenpin bowling

4.37 There is a tenpin bowling facility at Namco Funscape, Braintree Retail Park (26 lanes). The household survey results suggest that 29.5% of households in the study area visit tenpin bowling facilities. 68.5% of these respondents visit Namco Funscape, and this was the most popular tenpin bowling destination in the study area as a whole. Other facilities visited include Strikes, Sudbury (12.0%), Tenpin, Chelmsford (5.0%) and Tenpin, Colchester (4.6%).

4.38 The study area population in 2018 (255,141 people) can in theory support around 21 ten pin bowling lanes, based on the national average of one lane per 12,000 people. By 2033, the study area population (283,112 people) could support 24 lanes.

4.39 Based on the District's market share (68.5%), Braintree's catchment population could support 14 lanes in 2018, increasing to 16 lanes by 2033. Braintree's existing provision (26 bowling lanes) adequately meets the needs of Braintree District for the foreseeable future, and the facility is also likely to benefit from inflow of residents from the surrounding area. There is no need for additional tenpin bowling facilities within the District over the plan period.

Bingo, games of chance and gambling

4.40 There are no mainstream bingo facilities in Braintree District. The household survey results indicated that 3.2% of households in the study area visit bingo facilities, and most of these visit Gala Bingo in Colchester. This is around 65% of the national average bingo participation rate of around 5%.

4.41 Gala and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose built units. Bingo clubs have become increasingly sophisticated, and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators require a catchment population of 50,000 - 70,000 (source: Business in Sport and Leisure BISL).

4.42 The adult (over 18) population of Braintree District (estimated around 121,500 in 2018) would generate about 138,000 admissions based on 65% of the national participation rate (1.75 trips per adult). Based on national average figures (113,000 admissions per club), the District population could in theory support a bingo facility, assuming all trips were retained within the District, which is unlikely.

4.43 There is no clear need for a bingo facility in Braintree District. There may be scope to provide a bingo facility within Braintree District to meet the existing and potential future demand, although nearby facilities in Colchester will continue to meet some of these needs.

Nightclubs

4.44 The value of the nightclub market is around £2 billion with around 7,000 businesses (source: IBIS World, 2017). Large nightclubs (capacity up to 2,000 people) are generally located in large towns with a population of over 100,000 people. Legislation that has extended licensing hours for other drinking establishments and banned smoking indoors in public buildings has removed the industry's main competitive advantage. Customers can now visit pubs or bars that hold late night events. Nightclubs also came under pressure during the economic downturn.

4.45 The household survey results indicated that 4.9% of households in the study area visit nightclubs, but just 1.8% of these households attended a nightclub event in the District. The most popular destinations mentioned were Chelmsford (53.5%), Colchester (23.8%) and Sudbury (12.2%).

4.46 There is no clear need for additional nightclub facilities in Braintree District.

Conclusions

4.47 The commercial leisure assessment in this section suggests:

1. there is a requirement for around an additional 4,500 sq.m gross of food and beverage floorspace in Braintree District over the study period to 2033
2. the cinema capacity assessment suggests that there theoretical capacity for six additional cinema screens or 1,344 additional cinema seats within Braintree District over the study period, but major developments in Colchester are likely to remove this capacity;
3. although the provision of health and fitness station is lower per population than the regional average, the current retention of trips to use health and fitness facilities within the

District suggests that there is capacity for one or two medium-large sized health and fitness facilities over the plan period to meet future demand;

4 there is no need for additional theatre facilities, tenpin bowling, bingo or nightclubs in Braintree District over the study period as existing provision is sufficient to meet likely future needs.

5.0 Policy review

Introduction

5.1 This section provides recommendations on how the forecast growth and floorspace projections in the previous section can be accommodated within Braintree District's main centres, and provides a review of the 2015 Retail Study Update recommendations.

Policy background

5.2 The Braintree Core Strategy (adopted September 2011) sets out the retail hierarchy for the District (policy CS6). This identifies Braintree, Witham and Halstead as town centres, Great Notley as a district centre, and the key service villages of Coggeshall, Earls Colne, Hatfield Peverel, Kelvedon, Sible Hedingham and Silver End are identified as performing the role of local centres.

5.3 The Publication Draft of the Braintree Local Plan (June 2017) has been informed by the 2015 Retail Study Update. The Draft Local Plan replicates the strategy for accommodating growth and policy recommendations.

5.4 The National Planning Policy Framework (NPPF) indicates (paragraph 23) that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres. The need for development should be met in full and should not be compromised by limited site supply. However the NPPF Consultation Proposals (March 2018) suggests accommodating a minimum of ten years may be more appropriate than the full plan period.

5.5 In order to accommodate growth, local planning authorities should assess the need to expand town centres to ensure a sufficient supply of suitable sites. The NPPF (paragraphs 23 and 24) indicates local planning authorities should apply a sequential approach for development.

5.6 The National Planning Policy Guidance (PPG) indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through expanding centres, with the sequential test to be followed.

5.7 The PPG acknowledges that not all successful town centre regeneration projects are retail-led, or will involve significant new developments. Public realm, transport and accessibility improvements can play important roles. Town centre car parking strategies, in a move away from resisting parking in town centres, are to encourage improvements to both the quality and quantity of car parking provision, where required to enhance the performance of town centres.

5.8 Consistent with the sequential approach, town centres are expected to be the main focus for retail and leisure development. The NPPF does not require development to be of an appropriate scale and nature in relation to the centre in which it is located, but larger town centres have the best prospects for attracting investment from developers and multiple operators.

5.9 The designation of primary shopping areas or centre boundaries is important when applying the sequential approach, in order to direct retail and town centre uses to sustainable locations and determine whether a retail impact assessment is required. The NPPF indicates that the first preference for retail uses should be the primary shopping area (PSA), which will comprise the primary frontages and the secondary frontages that are contiguous with the primary frontages.

The first preference for leisure uses is normally the wider defined town centre, which usually includes the PSA and other parts of the town centre.

The hierarchy of centres

5.10 The NPPF (paragraph 23) indicates that planning policies should define a network and hierarchy of centres that is resilient to anticipated economic changes. The PPG indicates that planning policies should identify the appropriate and realistic role, function and hierarchy of centres over the plan period. The PPG also indicates that strategies should identify changes in the hierarchy, including where a centre is in decline.

5.11 In accordance with the NPPF, the Local Plan review should define a hierarchy of centres and ensure new main town uses are focused within these centres. Development of main town centre uses in the defined centres should be of a scale that is commensurate with the settlement role and function and does not unbalance the town centre hierarchy. The policy should also make it clear that an objective of the Local Plan is to maintain the vitality and viability of the centres identified within the retail hierarchy. Based on the scale of facilities available within each settlement and the retail floorspace projections in the 2015 Retail Study Update, Draft Local Plan policy LPP 10 (Retailing and Regeneration) identifies the retail hierarchy for the District, as outlined in Table 5.1 below.

Table 5.1 Braintree District retail hierarchy

Retail hierarchy	Centre
Town centre	Braintree, Witham, Halstead
District Centre	Great Notley Neighbourhood Centre
Local Centre	Coggeshall, Earls Colne, Hatfield Peverel, Kelvedon, Sible Hedingham, within local centres proposed as part of the Strategic Growth Locations and at Maltings Lane, Witham

5.12 No changes are required to the retail hierarchy within the Publication Draft Local Plan.

5.13 The definition of Braintree as a town centre is consistent with the NPPF. Braintree falls below larger regional and sub-regional centres in the surrounding area. The strategy for Braintree should seek to consolidate the town centre's role within the wider shopping hierarchy. Braintree should be the main focus for large-scale retail and leisure development in the District. As the main centre in the District, Braintree has the best prospects for attracting investment, and the town centre should be the main focus for future town centre uses, particularly comparison retail floorspace and restaurant uses.

5.14 The definition of Witham as a town centre is consistent with the NPPF. Witham should be the main focus for medium-scale retail and leisure development in the southern part of the District. As a secondary town centre in the District, Witham will is less likely to attract large scale investment, however the town centre should be the main focus for future town centre uses, particularly comparison retail floorspace and restaurant uses.

5.15 The definition of Halstead as a town centre is consistent with the NPPF. Halstead should be the main focus for medium-scale retail and leisure development in the northern part of the District. Similarly to Witham, as a secondary town centre in the District, Halstead will is less likely to attract large scale investment, but again the town centre should be the main focus for future town centre uses.

5.16 Outside the designated centres, and located to the south eastern edge of the Braintree urban area, Freeport Outlet Village and Braintree Retail Park are significant, established out of centre comparison goods retail destinations. The Draft Local Plan does not include Freeport or Braintree Retail Park within the retail hierarchy as a town, district or local centre, as they do not provide these functions, rather they function as specialised comparison shopping destinations.

5.17 Development proposals within these out of centre locations should continue to comply with the sequential and impact tests, in order to protect the vitality and viability of the network of centres within the District.

Impact thresholds

5.18 The NPPF 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 threshold. If there is no locally set threshold, the default threshold is 2,500 sq. m gross.

5.19 The PPG states that if setting a locally appropriate threshold, it is important to consider:

- the scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- the impact on any other planned investment.

5.20 If the NPPF threshold (2,500 sq.m gross) was adopted, then a single development proposal could exceed the entire development plan floorspace projection in some towns without the need for a retail impact assessment.

5.21 Proposals that significantly exceed the floorspace projections are likely to significantly reduce the turnover of existing floorspace, and this impact should be carefully tested on a case by case basis.

5.22 As set out in the previous 2015 Retail Study Update, the NPPF threshold of 2,500 sq.m gross is considered to be inappropriate as a blanket threshold for Braintree District, as this scale of development would represent a significant proportion of the overall retail projections in the District in the short to medium term. Development smaller than 2,500 sq.m gross could have a significant adverse impact on town and local centres.

5.23 Policy LPP10 of the Publication Draft Local Plan adopts the threshold recommendations from the 2015 Retail Study Update for all edge and out of centre development proposals for main town centre uses, as follows:

- 2,500 sq.m gross for Braintree;
- 1,500 sq.m gross for Witham and Halstead;
- 1,000 sq.m gross for Great Notley; and
- 500 sq.m gross for Local Centres.

5.24 The Draft Local Plan also identifies that an impact assessment may be required if a development proposal could potentially impact on an adjacent authority's retail centre, and identifies Sudbury, in adjacent Babergh District, as being potentially vulnerable. The draft policy requires an impact assessment for development proposals above 400 sq.m gross which may impact on this centre.

5.25 Although the floorspace requirements for the District have reduced in scale from the previous 2015 study, these thresholds recommendations are still considered to be appropriate. The thresholds are consistent with the current scale of each centre and the projected floorspace capacity estimates.

Town centre boundaries and primary shopping areas

5.26 The designation of primary shopping areas and town centre boundaries is important when applying the sequential approach, in order to direct retail and town centre uses to sustainable locations and determine whether a retail impact assessment is required. The NPPF indicates that the first preference for retail uses should be the primary shopping area, which will comprise the primary retail frontages and the secondary retail frontages. The first preference for other town centre uses, such as commercial leisure and office uses, is normally the wider defined town centre, which usually includes the primary shopping area and other parts of the town centre.

5.27 Policy regarding edge and out of centre development should be consistent with the NPPF in terms of the sequential and impact tests and should be worded to make reference to the primary shopping area and town centre boundary, clearly indicating where retail and other main town centre uses should be concentrated (ie. the sequential approach indicates that retail uses should be focused within the primary shopping area and other town centre uses should be focused within the wider town centre boundary, unless it can be demonstrated that there are no suitable and available sites).

5.28 Policy wording should also be aware of the emerging revised NPPF. The most pertinent suggested change in the draft NPPF (<u>underlined</u>) is at paragraph 87 - *"main town centre uses should be located in town centres, then edge of centre locations; and only if suitable sites are not available (<u>or expected to become available within a reasonable period</u>) should out of centre sites be considered"*.

5.29 The distinction between the primary shopping area (PSA) and the Town Centre boundary provides guidance on the appropriate location for different town centre uses, ie. retail uses should first be directed to the PSA, while other town centre uses such as offices, hotels and leisure can be located within the wider town centre area ie. the area between the PSA and the town centre boundary.

5.30 The proposals maps accompanying the Publication Draft Local Plan define town centre boundaries and PSAs for Braintree, Witham and Halstead. These have taken on board previous recommendations made in the 2012 and 2015 Retail Study Updates. District and local centre boundaries are also defined, but there is no need for separate PSAs within these centres.

Braintree

5.31 Future planning policies for Braintree town centre should continue to define a separate Primary Shopping Area (PSA) and Town Centre boundary, because the centre has concentrations of other town centre uses adjoining the main shopping area, e.g. the Civic area, car parks and employment uses. A separate PSA is necessary for applying the sequential approach for Class A1 retail uses.

5.32 The Town Centre boundary shown on the Publication Draft Local Plan proposals map includes all areas occupied by main town centre uses. This approach is consistent with the NPPF and no changes to the Town Centre and PSA boundary in Braintree are considered necessary.

Witham

5.33 The Publication Draft Local Plan proposals map shows a PSA and Town Centre boundary, because the centre has concentrations of other town centre uses adjoining the main shopping area, eg. churches, car parks and employment uses. A separate PSA is necessary for applying the sequential approach for Class A1 retail uses.

5.34 The Town Centre boundary as shown on the Publication Draft Local Plan proposals map includes all areas occupied by main town centre uses. This approach is consistent with the NPPF and no changes to the Town Centre and PSA boundary in Witham are considered necessary.

Halstead

5.35 The Publication Draft Local Plan proposals map shows a PSA and Town Centre boundary for Halstead. The centre has concentrations of other town centre uses adjoining the main shopping area, eg. churches, car parks and employment uses. A separate PSA is necessary for applying the sequential approach for Class A1 retail uses.

5.36 The Town Centre boundary as shown on the Publication Draft Local Plan proposals map includes all areas occupied by main town centre uses. This approach is consistent with the NPPF and no changes to the Town Centre and PSA boundary in Halstead are considered necessary.

Primary and secondary shopping frontages

5.37 Town centres should provide a range of complementary uses. A balance between retail, entertainment and leisure activity helps town centres compete with on-line shopping. Town centres need a good mix of uses that extend activity throughout the daytime and into the evenings. The retail capacity projections indicate there is a need for a range of new Class A1 to A5 floorspace over the plan period.

5.38 The NPPF indicates that policies which control the mix of uses can be adopted in order to maintain the vitality and viability of town centres. The NPPF indicates that development plans may continue to distinguish between primary and secondary frontages in town centres and consider their relative importance to the character of the centre. Primary frontages are characterised by a high proportion of retail uses, while secondary frontages are areas of mixed commercial development. Local planning authorities can define primary and secondary frontages, where primary frontages should contain a high proportion of Class A1 retail use and secondary frontages will have greater diversity. In addition to indicating what uses will be permitted in these defined areas, local planning authorities should:

"- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of 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."

5.39 It is clear that a balanced mix of uses is required in town centres. There is a reasonable degree of flexibility for local authorities to take into account local circumstances during the plan making process, and in this respect the NPPF is not prescriptive.

5.40 Since the 2015 Study Update, there has not been a significant change to land uses within the centres, and no changes to the policy approach in the Draft Local Plan is required.

5.41 The proposals maps accompanying the Publication Draft Local Plan identify primary and secondary frontages for Braintree, Witham and Halstead. It is unnecessary to define primary and secondary shopping frontages for the district and local centres, given the small scale of retail and service provision.

Braintree

5.42 The Publication Draft Local Plan proposals map distinguishes between primary and secondary frontages in Braintree. These frontages follow the recommendations made in the 2012 and 2015 Retail Study Updates.

5.43 The capacity projections within this study indicate there is a need to retain a mix of Class A1 to A5 uses within Braintree in order to meet the needs of the community. The previous 2015 Retail Study suggested no change to the boundaries and there is no need to change the current primary and secondary frontage designations from those proposed in the Publication Draft Local Plan.

Witham

5.44 The Publication Draft Local Plan proposals map identifies primary and secondary frontages in Witham. These frontages follow the recommendations made in the 2012 and 2015 Retail Study Updates.

5.45 The capacity projections within this study indicate there is a need to retain a mix of Class A1 to A5 uses within Witham in order to meet the needs of the community. The previous 2015 Retail Study suggested no change to the boundaries and there is no need to change the current primary and secondary frontage designations from those proposed in the Publication Draft Local Plan.

Halstead

5.46 The Publication Draft Local Plan proposals map identifies primary and secondary frontages in Halstead. These frontages follow the recommendations made in the 2012 and 2015 Retail Study Updates.

5.47 The capacity projections within this study indicate there is a need to retain a mix of Class A1 to A5 uses within Halstead in order to meet the needs of the community. The previous 2015 Retail Study suggested no change to the boundaries and there is no need to change the current primary and secondary frontage designations from those proposed in the Publication Draft Local Plan.

6.0 Accommodating growth

Introduction

6.1 This section provides recommendations on how the forecast growth and floorspace projections in the previous section can be accommodated within Braintree District's main centres, and provides a review of the 2015 Retail Study Update recommendations.

Floorspace projections

6.2 The floorspace projections set out in the previous sections assume that other competing centres will improve in the future. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- major retail developments in competing centres eg. Colchester and Chelmsford;
- the re-occupation of vacant retail floorspace;
- the availability of land to accommodate new development;
- the reliability of long term expenditure projections;
- the effect of internet/home shopping on the demand for retail property;
- the level of operator demand for floorspace in Braintree District;
- the ability of Braintree District to maintain its existing market share of expenditure in the future in the face of increasing competition;
- the potential impact new development may have on existing centres.

6.3 The PPG suggests town centre strategies should plan for a 3-5 year period, but the longer term plan period should be considered. Projections up to 2023 are realistic and are based on up to date forecasts, which take into account the effects of the recession. The long term floorspace projections (up to 2028 and beyond) should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development management decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review.

6.4 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading have been excluded. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. The impact of internet growth on the demand for retail floorspace is unclear. Some retailers' home delivery and internet services utilise existing stores rather than warehouses, for example Tesco Direct. Growth in internet sales will not always reduce the demand for shop floorspace. In addition, some of the growth in internet sales may divert trade away from mail order companies rather than retail operators. Overall the long term impact of home shopping on expenditure projections is uncertain.

6.5 The quantitative and qualitative assessment of the potential for new Class A retail floorspace within the previous sections suggests there is scope for new development within Braintree District during the Plan period (to 2033). This section examines the opportunities for accommodating this projected growth and assesses potential to accommodate this floorspace.

6.6 The projections up to 2033 suggest there is scope for 2,794 sq.m gross of convenience goods floorspace, 9,745 sq.m gross of comparison goods floorspace and 4,506 sq.m gross of Class A3 to A5 space. These figures remove the 'negative' requirement for convenience goods floorspace in Witham and Halstead. In total 17,045 sq.m gross could be provided in Braintree District by 2033.

6.7 Table 6.1 below summarises the floorspace projections in 2033.

Table 6.1 Summary of floorspace projections 2033 (sq.m gross)

Area	Convenience	Comparison	Food & beverage	Total
Braintree	2,927	5,978	2,010	10,915
Freeport/Braintree RP	0	2,480	674	3,154
Witham	0	1,135	1,039	2,174
Halstead	0	721	783	1,504
Total	**2,927**	**10,315**	**4,506**	**17,748**

Source: Table 11 in Appendix 2, Table 12 in Appendix 3 and Table 11 in Appendix 3

6.8 This is around half of the floorspace projections to 2033 identified in the 2015 Retail Study Update. The 2015 Update suggested that there is scope for 8,966 sq.m gross of convenience goods floorspace, 15,869 sq.m gross of comparison goods floorspace and 8,304 sq.m gross of Class A3 to A5 space, a total of 33,139 sq.m gross for Braintree District by 2033.

6.9 There are a number of factors that account for this significant reduction in the forecast floorspace requirements since the 2015 Update. First, the forecast population growth for the study area is around 4% lower than previously projected. Second, Experian's latest forecast growth rates for expenditure per capita are lower. Table 6.2 below provides a comparison between the 2015 Update and 2018 Update average per capita expenditure estimates for the study area in 2033.

Table 6.2 Average per capita expenditure estimates for the study area, 2033

Per capita expenditure, 2033	2015 Update	2018 Update	Difference
Convenience	£2,277	£2,140	-6%
Comparison	£5,563	£5,050	-9%
Food & beverage	£1,524	£1,372	-10%

6.10 For the convenience goods expenditure projections, the benchmark turnover of the existing stores within the District has increased by around £50 million, partly due to an increase in sales densities for most of the operators, and the opening of the new Aldi and Lidl stores in Witham and Halstead. For comparison goods, the turnover of the identified commitments/proposals also absorbs some of the surplus expenditure at Freeport/Braintree Retail Park.

6.11 All of these factors together have resulted in lower estimates of floorspace requirements for Braintree District over the plan period.

Accommodating growth

6.12 The sequential approach suggests that designated centres should be the first choice for retail and leisure development. Development should be appropriate in terms of scale and nature to the centre in which it is located. In accommodating future growth, the following issues should be taken into consideration:

- What is the locational area of need the development seeks to serve and what existing centre could potentially fulfil the identified area of need?
- Is the nature and scale of development likely to serve a wide catchment area?
- Is a site available in one of the designated centres, including vacant premises and will this site meet the identified need?
- If the development has a more localised catchment area, is a site available in a local centre and will this site meet the identified need?

6.13 The existing stock of premises will have a role to play in accommodating projected growth during the economic recovery. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. For comparison goods, growth rates of between 0.9% and 2.3% per annum (see Table 11, Appendix 3) are assumed, and a growth rate of 1% per annum is assumed for food and beverage floorspace. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

6.14 There are currently 55 vacant shop units within the three main town centres in the District, which equates to an overall vacancy rate of 9.9%, which is below the Goad national average (11.2%). Existing vacant floorspace amounts to around 8,780 sq.m gross (giving an average unit size of 160 sq.m gross), which is relatively evenly distributed between the three centres.

6.15 Vacant premises should help to accommodate future growth in Braintree, Witham and Halstead. As a target, the current vacancy level in the town centres could fall to 8%, i.e. around the pre-recession national average, recognising there will always be a certain level of vacant space due to the churn of occupiers in centres. If this reduction in vacancy rate is achieved then the number of reoccupied units would be 11 re-occupied units in the District. The reoccupation of these 11 vacant units could accommodate about 1,800 sq.m gross of Class A1 to A5 floorspace.

6.16 The reoccupied units could be broken down as follows:

1 Braintree: 3 units (500 sq.m gross);

2 Witham: 3 units (500 sq.m gross);

3 Halstead: 5 units (800 sq.m gross).

6.17 If this reduction in vacant units is achieved, then the overall Class A1 to A5 floorspace projection up to 2033 would reduce from 17,748 sq.m gross (Table 5.1 above) to 15,948 sq.m gross.

6.18 Within town centres, many high street multiple comparison retailers have changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation of activity into the larger regional and sub-regional centres. Operator demand for space has decreased during the recession and, of those national multiples looking for space many prefer to locate in larger centres.

6.19 The continuation of these trends will influence future operator requirements in Braintree District, with smaller vacant units becoming less attractive for new multiple occupiers, and retailers increasingly looking to relocate into larger units in higher order centres. However, smaller vacant units could still be attractive to independent traders and non-retail services.

6.20 The existing vacant units in the centres are generally small or in secondary locations. These units may not be attractive to retailers seeking modern units. It may be more likely that the vacant units would be reoccupied for non-A1 retail uses, and the Council should take a flexible approach to applications for the change of use of vacant retail units in secondary areas where this could improve activity and investment in the centres.

Development opportunities

6.21 Retail and leisure growth should be focused in the main town centres where there are the best prospects for attracting investment. This is consistent with the approach set out in the existing development plan and the NPPF.

Braintree

6.22 As set out in Table 6.1, the capacity assessment identifies that there is a projection for 10,915 sq.m gross of A1-A5 floorspace in Braintree (including Great Notley) by 2033 and 3,154 sq.m gross of comparison goods retail and A3-A5 floorspace in Freeport/Braintree Retail Park. For comparison, the previous 2015 Retail Study Update identified a total floorspace requirement for Braintree (including Great Notley, Freeport and Braintree Retail Park) of around 27,000 sq.m gross by 2033 (Table 5.1 of Retail Study Update 2015).

Braintree town centre

6.23 Within Braintree town centre, development options appear to be limited, particularly in the short term. The development potential of the town centre is constrained by its historic environment, street layout and neighbouring residential areas.

6.24 There are limited development opportunities within Braintree town centre. Policy LPP16 of the Publication Draft Local Plan (June 2017) identifies the following sites within Braintree town centre for retailing and other main town centre uses:

- Land at Manor Street;
- Tesco Store, Car Park and Pound End Mill, New Street; and
- Sainsbury's Store and Car Park, Toft's Walk.

6.25 A previously identified site to the west of George Yard has been removed from the previous version of the draft Local Plan.

6.26 These sites were assessed in the previous 2015 Retail Study Update, and remain the key options for accommodating the forecast retail needs within Braintree town centre. Policy LPP10 of the Draft Local Plan states that the improvement and regeneration of the town centres will be promoted and the regeneration of the above sites is proposed to meet the identified need for additional retailing, community facilities and services and other main town centre uses.

6.27 The Manor Street site is located to the rear of the Town Hall and Library, and currently contains a surface car park, bus stands and community centre. We understand that the site could be developed for a new doctor's surgery, plus restaurant uses. The site therefore is unlikely to include any significant levels of Class A1 retail floorspace in the future, but will go some way to meeting the identified need for additional food and beverage floorspace in the town centre.

6.28 The Tesco store and car park was identified in the previous Study Update as having potential for redevelopment of the existing Tesco to provide a replacement or smaller modern food store, and additional comparison units. The comprehensive redevelopment of the site could increase comparison goods retail floorspace by 2,500 – 5,000 sq.m gross. Subject to commercial requirements by Tesco, there is potential for redevelopment of the site to come forward in the medium to long term.

6.29 The Sainsbury's store and car park was identified in the previous Study Update as having potential for part redevelopment of the Sainsbury's store to provide new retail units on Drury Lane and part extension to existing store for replacement and additional floorspace. The site is currently poorly linked to the rest of the town centre, and there are constraints due to the conservation area and close proximity to listed buildings. If development of the site does come forward, then the site could potentially provide an additional 2,000 sq.m gross of comparison goods floorspace.

6.30 Additional windfall opportunities within the town centre may become available, but are likely to be small scale (less than 500 sq.m gross).

6.31 If Braintree cannot accommodate the floorspace projection within the town centre, then the Council could seek to allocate sites elsewhere within the District to meet accommodate the long term projections.

6.32 Some of the projected floorspace requirements should also be directed towards major housing developments within the District. It is anticipated that proposals for a new supermarket will come forward within a new local centre in the North West Braintree Growth, and this will absorb some of the identified retail capacity.

Braintree out of centre

6.33 The identified floorspace requirement of around 3,000 sq.m gross of comparison goods retail and A3-A5 floorspace in Freeport/Braintree Retail Park by 2033 is in addition to the retail commitment/proposals for a new B&Q store and extension to the Next unit (Table 10, Appendix 3).

6.34 Policy LPP16 of the Publication Draft Local Plan (June 2017) identifies the following sites in the Braintree area for retail warehousing:

- land north of Freeport; and
- land off Millennium Way.

6.35 Previously identified sites at Braintree Retail Park and Broomhills industrial area have been removed from this version of the Local Plan. At Braintree Retail Park, there is limited scope to significantly increase the amount of floorspace.

6.36 The site identified at Millennium Way is to be developed for the new B&Q store, and this will release the existing B&Q store at Braintree Retail Park for occupation by alternative operators.

6.37 The site to the north of Freeport comprises an L-shaped area of undeveloped land. The site is considered to be most suitable for bulky comparison goods retail or 'outlet' retailers consistent with the existing function of this retail destination together with some ancillary food and beverage uses, and could accommodate all of the floorspace requirements identified for Freeport/Braintree Retail Park over the plan period.

Witham

6.38 As set out in Table 6.1 above, the capacity assessment indicates 2,174 sq.m gross of Class A1-A5 floorspace could be provided in Witham by 2033. There is no need for any additional convenience goods floorspace in Witham. For comparison, the previous 2015 Retail Study Update identified a total floorspace requirement for Witham of around 3,300 sq.m gross by 2033 (Table 5.1 of Retail Study Update 2015).

6.39 Policy LPP16 of the Publication Draft Local Plan (June 2017) identifies the following site within Witham town centre for retailing and other main town centre uses:

1. Newlands Shopping Centre (including land to the rear of Coach House Way).

6.40 A previously identified site at the former Co-op department store, Newlands Street/Kings Chase has been removed from the previous version of the draft Local Plan.

6.41 The Newlands Shopping Centre site comprises an outdoor shopping centre with retail/commercial uses at ground level and offices above, together with the adjacent site to the rear of Coach House Way. The majority of ground floor units within the shopping centre are occupied, but there are a number of vacant units dispersed throughout the shopping centre and the centre is in need of refurbishment. The 2015 Retail Study Update identified that refurbishment/redevelopment and extension of the existing centre could increase the retail floorspace by around 2,000 sq.m gross. This site remains a good development opportunity in the short to medium term and would accommodate the floorspace requirements for Witham.

6.42 Small windfall opportunities may also become available within Witham town centre. The future focus for the primary shopping area is likely to be small scale intensification and extensions.

6.43 Maltings Lane, Witham is the location of a new residential area, where the new Aldi store has recently opened. The proposals map shows scope for additional retail floorspace adjacent to the Aldi. As noted above, there is a limited requirement for additional retail floorspace in and around Witham, however a new local centre at Maltings Lane would serve the new and existing residents in the surrounding south west Witham area.

Halstead

6.44 As set out in Table 6.1 above, the capacity assessment indicates 1,504 sq.m gross of Class A1-A5 floorspace could be provided in Halstead by 2033. There is no need for any additional convenience goods floorspace in Halstead. For comparison, the 2015 Retail Study Update identified a total floorspace requirement for Halstead of around 2,900 sq.m gross by 2033 (Table 5.1 of Retail Study Update 2015).

6.45 Policy LPP16 of the Publication Draft Local Plan (June 2017) identifies the EMD Site, Kings Road within Halstead town centre for retailing and other main town centre uses. The EMD site has now been developed for a new Lidl store.

6.46 The previously identified site to the east of the High Street is now shown as a ‘regeneration area’ on the proposals map. This site has been a longstanding allocation for redevelopment. There are a number of constraints to the development of the site, which is bounded by residential properties, has Tree Preservations Orders on site and a constrained access. Previously, there has been interest from Tesco in developing a store on the site. We understand that this site is now more likely to be developed for housing, and is therefore unlikely to deliver additional retail floorspace.

6.47 On this basis, neither of the identified development opportunities within Halstead town centre will contribute towards the retail floorspace requirements identified for Halstead. Options for development are likely to be limited to windfall opportunities and the future focus for the primary shopping area is likely to be small scale intensification and extensions.

6.48 If the floorspace requirements cannot be accommodated within the town centre, then the Council could seek to allocate sites elsewhere within the District to meet accommodate the long term projections. Some of the projected floorspace requirements should also be directed towards major housing developments within the District.

7.0 Conclusions and recommendations

7.1 This 2018 Retail Study Update provides a review of the District wide retail and leisure needs in Braintree District. This section draws together the analysis set out in previous sections and provides strategic recommendations for the main centres in Braintree District. It explores how the identified growth across the District could be accommodated and the potential distribution of future development.

Braintree District's need

7.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail and leisure development over the plan period. When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

7.3 Long term floorspace capacity forecasts beyond 10 years are susceptible to unforeseen circumstances. Growth forecasts for expenditure and turnover are particularly uncertain and need to be carefully monitored. Long term projections must be treated with caution and kept under review, particularly projections between 2028 and 2033.

Convenience goods development

7.4 The convenience goods projections suggest new floorspace could be distributed as shown in Table 11.1.

Table 7.1 Convenience goods floorspace projections (sq.m gross)

Centre	By 2023	By 2028	By 2033
Braintree	1,444	2,196	2,927
Witham	0	0	0
Halstead	0	0	0

Source: Table 11, Appendix 2

7.5 There is no requirement for any additional convenience goods floorspace in either Witham or Halstead, following the recent opening of the Aldi and Lidl stores.

7.6 In qualitative terms, food store retail provision is strong in Braintree. There are a number of large food stores (over 1,000 sq. m net) suitable for main and bulk food shopping in and around Braintree, Witham and Halstead. The other centres provide small food stores suitable for basket and top up shopping. There are no clear identified areas of qualitative deficiency in food store provision within the District.

Comparison goods development

7.7 The comparison goods projections suggest new floorspace in the District could be distributed as shown in Table 7.2. Residents have a good choice of higher order comparison shops in Braintree town centre, Freeport and Braintree Retail Park, providing a wide range of goods. Witham and Halstead town centres provide a reasonable but smaller scale comparison goods offer.

Table 7.2 Comparison goods floorspace projections (sq.m gross)

Centre	By 2023	By 2028	By 2033
Braintree	1,649	3,789	5,978
Freeport/Braintree Retail Park	0	0	2,480
Witham	309	717	1,135
Halstead	196	455	721

Source: Table 12, Appendix 3

7.8 Investment will be needed in the District in order to retain the existing levels of comparison goods expenditure. The objective of the development strategy for Braintree District should be to maintain the District's shopping role and market share within the sub-region, in the face of increasing competition. The economic projections assume that new development will retain the District's share of comparison expenditure in the study area and will help to maintain this share in the future.

Food and beverage development

7.9 The food and beverage projections suggest new floorspace could be distributed as shown in Table 7.3. All centres have a good provision of Class A3 (restaurant/café) uses. Growth in expenditure should provide opportunities to enhance food and beverage provision within all centres.

Table 7.3 Food and beverage floorspace projections (sq.m gross)

Centre	By 2023	By 2028	By 2033
Braintree	618	1,323	2,010
Freeport/Braintree Retail Park	206	443	674
Witham	317	683	1,039
Halstead	238	514	783

Source: Table 11, Appendix 4

Other main town centre uses

7.10 Residents in Braintree District have good access to a range of commercial leisure and entertainment facilities within the District and in the surrounding area. There may be scope for one or two medium-large sized health and fitness facilities. The potential for cinema development is likely to be constrained by new cinema proposals in Colchester.

7.11 There is no clear need for additional theatre facilities, tenpin bowling, bingo or nightclubs in Braintree District over the study period as existing provision is sufficient to meet likely future needs.

7.12 Other uses and new emerging leisure activities could be appropriate and the strategy needs to be flexible and have the ability to respond to emerging opportunities for new facilities of this kind.

Strategy for accommodating growth

7.13 The floorspace projections shown in this study provide broad guidance. Meeting the projections to 2023 and 2028 is the priority, and longer term projections need to be monitored.

7.14 The short term priority should be the reoccupation of vacant floorspace in the centres. There are development opportunities in Braintree and Witham town centres, which offer potential to accommodate some or all of the projected growth. No sites are identified in Halstead. These development opportunities and vacant units could accommodate the floorspace capacity up to 2033.

7.15 The strategic housing allocations in Braintree and Witham will also need to provide local centres to serve the day to day needs of the new residential areas. As a rule of thumb, a strategic housing allocation of around 2,000 homes could support local shopping facilities of up to 1,500 sq.m gross, providing a balance of convenience, comparison and food/beverage floorspace.

Policy review

The hierarchy of centres

7.16 In accordance with the NPPF, the Local Plan should define a hierarchy of centres and ensure new main town uses are focused within these centres. Development of main town centre uses in the defined centres should be of a scale that is commensurate with the settlement role and function and does not unbalance the town centre hierarchy.

7.17 Draft Local Plan policy LPP10 adopts the recommendations of the 2015 Retail Study Update and identifies the retail hierarchy in Table 7.4. No changes are considered necessary to the retail hierarchy.

Table 7.4 Braintree District retail hierarchy

Centre Hierarchy	Centre
Town Centre	Braintree, Witham, Halstead
District Centre	Great Notley Neighbourhood Centre
Local Centre	Coggeshall, Earls Colne, Hatfield Peverel, Kelvedon, Sible Hedingham, within local centres proposed as part of the Strategic Growth Locations and at Maltings Lane, Witham

Source: Lichfields' Analysis

Impact thresholds

7.18 Development that serves more than a local catchment area should be concentrated in Braintree, Witham and Halstead town centres. Development of more than local significance should consider sequential sites within and on the edge of these three town centres.

7.19 The Publication Draft Local Plan adopts the 2015 Retail Study Update recommendations for thresholds for retail impact assessments, as shown in Table 7.5.

Table 7.5 Braintree District - impact thresholds

Centre	Impact Threshold
Braintree	Over 2,500 sq.m gross
Witham and Halstead	Over 1,500 sq.m gross
Great Notley	Over 1,000 sq.m gross
Local centres	Over 500 sq.m gross
Sudbury (outside Braintree District)	Over 400 sq.m gross

Source: Lichfields' Analysis

7.20 The reduced locally set thresholds are appropriate based on the retail floorspace projections within this study. No changes are considered necessary to the impact thresholds.

Town centre boundaries and frontages

7.21 Future plan policies should continue to define separate Primary Shopping Areas and Town Centre boundaries for Braintree, Witham and Halstead town centres. A separate Primary Shopping Area is necessary for applying the sequential approach for Class A1 retail uses.

7.22 The Town Centre and District/Local Centre boundaries as currently drawn in the Publication Draft Local Plan proposals map are based on the recommendations of the 2015 Retail Study Update, and are consistent with the NPPF. No changes are considered necessary.

7.23 The development plan should continue to distinguish between primary and secondary frontages in Braintree, Witham and Halstead. The proportion of Class A1 uses within the defined primary frontages remains high and there are no significant concentrations of non-Class A1 use. There is no need to change the current primary and secondary frontage designations.

7.24 The current approach in the Publication Draft Local Plan is considered to be robust and should continue to be adopted.

Future monitoring

7.25 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail development in the medium to long term up to 2033. Long term projections are subject to uncertainty and forecasts will need to be amended to reflect emerging changes, as and when new information becomes available. Longer-term projections after 2028 should be treated with caution and provide broad guidance only.

7.26 Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

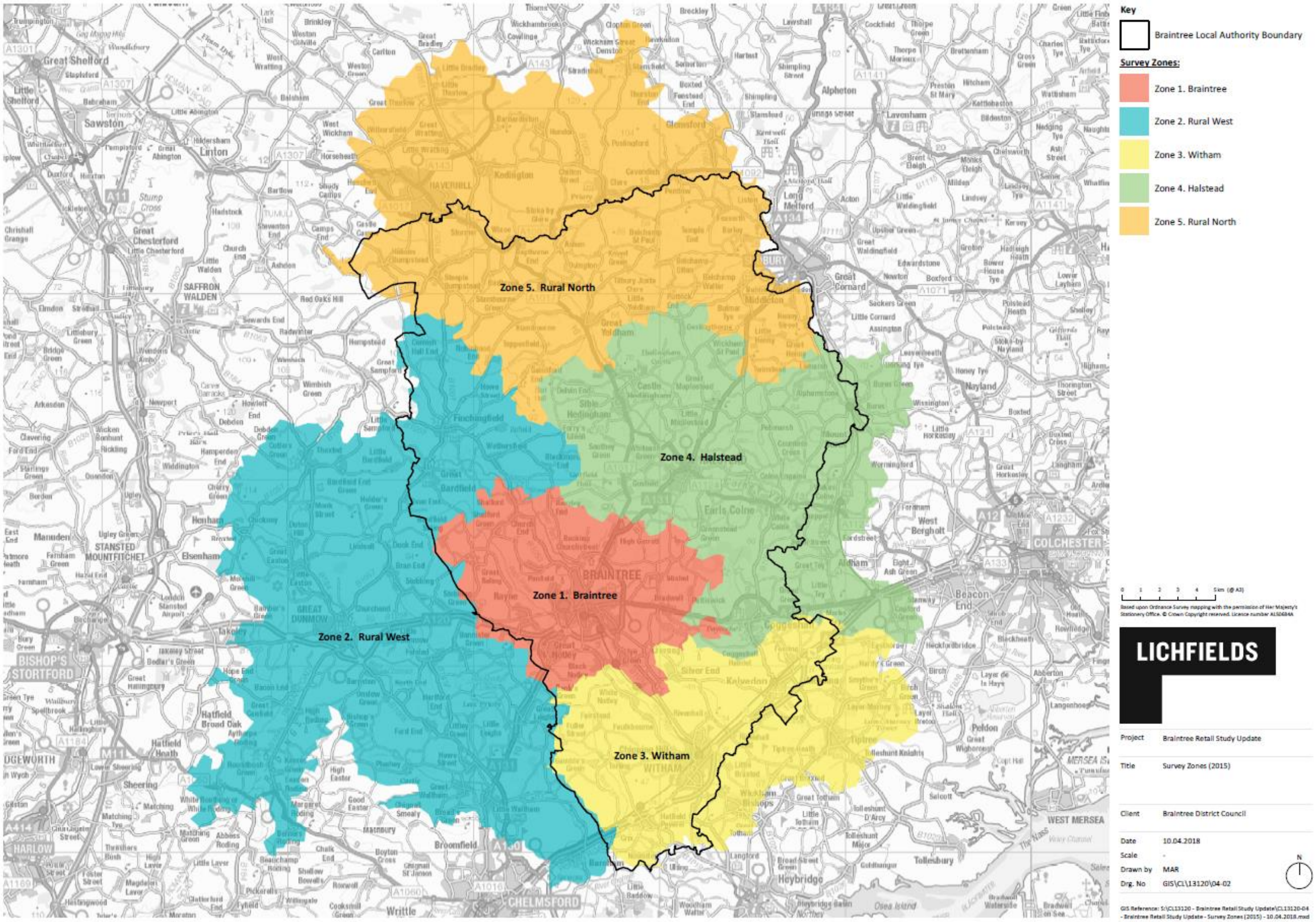
1. population projections;
2. local expenditure estimates (information from Experian or other recognised data providers);
3. growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
4. the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
5. existing retail floorspace and average turnover to floorspace densities; and
6. implemented development within and around the study area.

7.27 These key inputs into the retail capacity assessment can be amended to provide revised capacity projections.

Appendix 1: Methodology

Braintree Study Area Zones

Zone	Postcode Sector
1 – Braintree	CM7 1 CM7 2 CM7 3 CM7 5 CM7 9 CM77 6 CM77 7 CM77 8
2 – Rural West	CM3 1 CM3 3 CM6 1 CM6 2 CM6 3 CM7 4
3 – Witham	CM3 2 CM8 1 CM8 2 CM8 3 CO5 0 CO5 9
4 – Halstead	CO6 1 CO6 2 CO8 5 CO9 1 CO9 2 CO9 3
5 – Rural North	CB9 0 CB9 7 CB9 8 CB9 9 CO9 4 CO10 7 CO10 8


Key
Braintree Local Authority Boundary
Survey Zones:
Zone 1. Braintree
Zone 2. Rural West
Zone 3. Witham
Zone 4. Halstead
Zone 5. Rural North
Zone 5. Rural North
Zone 4. Halstead
Zone 1. Braintree
Zone 2. Rural West
Zone 3. Witham
0 1 2 3 4 5km (@ A3)
Based upon Ordnance Survey mapping with the permission of Her Majesty's Stationery Office. © Crown Copyright reserved. Licence number AL50684A
LICHFIELDS
Project Braintree Retail Study Update
Title Survey Zones (2015)
Client Braintree District Council
Date 10.04.2018
Scale -
Drawn by MAR
Drg. No GIS\CL\13120\04-02
N
GIS Reference: S:\CL13120 - Braintree Retail Study Update\CL13120-04 - Braintree Retail Study Update - Survey Zones (2015) - 10.04.2018.mxd

Retail capacity assessment – methodology and data

The approach adopted to produce retail projections follows the key steps identified within the PPG. The approach adopts economic growth forecasts that are widely used and accepted for development plan preparation and at planning inquiries.

Stage 1 establishes existing demand (population and expenditure) and supply (floorspace and facilities). Stage 2 assesses the balance between supply and demand and projects forward to quantify future requirements for new facilities. Stage 3 considers how future growth should be distributed and accommodated.

Price base

All monetary values expressed in this study are at 2016 prices, consistent with Experian's most up to date base year expenditure figures for 2016 (Experian Briefing Note 15, December 2017).

Study area

The quantitative analysis is based on a defined Study Area that covers the catchment areas of the main shopping destinations in the District. The zones are the same as those previously adopted in the 2015 Retail Study Update, which reflect the catchment areas of the centres within Braintree District.

The Study Area has been sub-divided into five zones based on postcode sectors and take into consideration the extent of the primary catchment areas of the three main settlements of Braintree, Witham and Halstead.

The primary catchment areas are the area where each centre will attract the vast majority of its retail trade. There will be retail expenditure leakage from the study area zones to centres outside, but conversely expenditure inflow from surrounding areas.

Population

The projected population within the study area between 2018 and 2033 is set out in Table 1, Appendix 2. Base year population data has been obtained from Experian for each zone based on the 2011 Census. The population estimate for each zone has been projected forward up to 2033 using the Office of National Statistics' latest 2014-based sub-national population projections (published May 2016), following a review of the Objectively Assessed Housing Need Study for Braintree, Chelmsford, Colchester and Tendring Districts (November 2016, Peter Brett Associates). The base year (2018) population within the study area is 255,141 which is projected to increase by 11% to 283,112 by 2033.

If population projections change during the development process then it may be necessary to monitor and test the implications of these changes, and revised floorspace capacity figures may need to be produced. The implications of potential these changes to population projections are not expected to significantly change the floorspace capacity estimates in this report.

Retail expenditure

The level of available expenditure to support retailers is based on first establishing per capita levels of spend for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2016 have been obtained.

Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 15, December 2017) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and values, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

Growth rates

Experian's EBS growth forecast rates for expenditure reflect the current economic circumstance and post Brexit forecasts. Experian provides an appropriate growth rate for the short term as per Table 4.1 below. In the longer term it is more difficult to forecast year on year changes in expenditure, but Experian's longer term growth average forecasts have been adopted and are set out in the Table A1.1 below.

Table A1.7.6 Post-Brexit Growth Forecasts

Year	Convenience Goods Growth Forecasts	Comparison Goods Growth Forecasts
2017	0%	+2.3%
2018	-0.6%	+0.9%
2019	-0.2%	+2.1%
2020-2024	0.1% per annum	+3.2% per annum
Post 2024	0.1% per annum	+3.2% per annum

Source: Experian Briefing Note 15 (December 2017)

These growth rates are relatively cautious when compared with past growth rates, but represent the most realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

Special forms of trading

Special forms of trading (SFT) or non-store activity is included within Experian's expenditure estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling.

Home/electronic shopping has emerged with the increasing growth in the use of personal computers and the internet. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing. The Experian information suggests that non-store retail sales in 2017 was:

- 10.8% of convenience goods expenditure; and
- 19.7% of comparison goods expenditure.

Experian predicts that these figures will increase in the future. Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies.

The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures for SFT are set out in Table A1.2 below.

Table A1.2 Adjusted SFT Estimates for the UK

Year	Convenience (%)	Comparison (%)
2018	3.4%	15.4%
By 2023	4.2%	17.4%
By 2028	4.8%	17.6%
By 2033	5.2%	17.9%

Source: Experian Briefing Note 15 (December 2017)

Forecast spend per head

Table 2, Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2033. Forecasts of comparison goods spending per capita are shown in Table 2, Appendix 3.

Table 3, Appendix 2 sets out total convenience goods within the study area up to 2033 (population multiplied by average expenditure per capita). Forecasts of comparison goods spending are shown in Table 3, Appendix 3.

As a consequence of growth in population, convenience goods spending within the study area is forecast to increase by 10.2% from £549.62 million in 2018 to £605.86 million in 2033, as shown in Table 3, Appendix 2. Comparison goods spending is forecast to increase by some 71.1% between 2018 and 2033, increasing from £835.73 million in 2018 to £1,429.60 million in 2033, as shown in Table 3, Appendix 3. These figures relate to real growth and exclude inflation.

It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on groceries does not necessarily increase proportionately with disposable income, whereas spending on non-food goods is more closely linked to income. Growth is still likely to be less than was previously envisaged pre-Brexit.

Market shares/penetration rates

To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the October 2015 household survey that informed the 2015 Study Update. The results of the household shopper questionnaire survey undertaken by NEMS in October 2015 have been used to estimate existing shopping patterns within the study area zones.

The total turnover of shops within Braintree District is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Global Data, which provides an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

The results of the household shopper survey relating to main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone for convenience goods shopping are shown in Table 4, Appendix 2. The market shares in Table 4 are a combined rate for both main and top up shopping based on a 70:30 split. This 70:30 split is based on Lichfields' experience and is widely accepted in retail studies of this kind.

The market shares for comparison goods shopping are shown in Table 4, Appendix 3. This market share is based on a weighted average for each comparison goods category including within the household survey e.g. clothing/footwear, electrical, furniture, floorcoverings, DIY and health and beauty products.

Benchmark turnover levels

Company average turnover of sales floorspace densities are available for major food store operators and are compiled by Global Data. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

The estimated convenience goods sales areas have been derived from a combination of the Institute of Oxford Retail Consultants (ORC) StorePoint database, Goad data and Lichfields' own on-site surveys. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.

Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within Braintree District and Lichfields' experience of trading levels of small independent shops an average sales density of £5,000 per sq.m net for convenience shops/stores in the District has been adopted. The total benchmark turnover of identified convenience sales floorspace within Braintree District is £303.84 million (Table 9, Appendix 2).

Global Data and Mintel's Retail Rankings provide company average sales density information for a selection of national comparison retailers. Based on Lichfields' experience, the average sales density for high street comparison retailers usually ranges between £5,000 and £8,000 per sq.m net. The average sales density for food and beverage outlets is usually around £5,000 per sq.m gross.

Appendix 2: Convenience Goods Capacity

Table 1: Study Area Population

Zone	2011	2018	2023	2028	2033
Zone 1 - Braintree	60,008	62,867	65,195	67,440	69,522
Zone 2 - Rural West	39,809	43,599	46,201	48,552	50,627
Zone 3 - Witham	54,496	57,504	59,713	61,842	63,802
Zone 4 - Halstead	39,374	41,513	43,108	44,644	46,055
Zone 5 - Rural North	48,995	49,658	50,868	52,034	53,106
Total	**242,682**	**255,141**	**265,084**	**274,512**	**283,112**

Sources: *Experian 2011 Census of Population*
ONS 2014-Based Subnational Population Projections

Table 2: Convenience Goods Expenditure per person (£)

Zone	2018	2023	2028	2033
Zone 1 - Braintree	2,060	2,047	2,044	2,046
Zone 2 - Rural West	2,236	2,222	2,219	2,221
Zone 3 - Witham	2,128	2,114	2,112	2,113
Zone 4 - Halstead	2,206	2,192	2,189	2,191
Zone 5 - Rural North	2,189	2,175	2,173	2,174

Sources:
Experian Local Expenditure 2016 (2016 prices)
Growth Rates: 0% 2016-2017, -0.6% 2017-2018, -0.2% 2018-2019 and 0.1% p.a. from 2019
Excludes Special Forms of Trading

Table 3: Total Convenience Goods Expenditure (£m)

Zone	2018	2023	2028	2033
Zone 1 - Braintree	129.48	133.43	137.85	142.22
Zone 2 - Rural West	97.50	102.67	107.76	112.45
Zone 3 - Witham	122.36	126.26	130.59	134.84
Zone 4 - Halstead	91.56	94.48	97.72	100.89
Zone 5 - Rural North	108.71	110.66	113.05	115.47
Total	**549.62**	**567.50**	**586.97**	**605.86**

Source: Tables 1 and 2

Table 4: Base Year 2018 Convenience Goods Market Shares (%)

Centre/Facility	Zone 1 Braintree	Zone 2 Rural West	Zone 3 Witham	Zone 4 Halstead	Zone 5 Rural North	% Inflow
Braintree Town Centre/Other Braintree/Zone 1/2						
Sainsbury's, Tofts Walk	15.0%	3.2%	0.7%	2.1%	0.1%	2.0%
Tesco, Market Place	10.0%	3.7%	1.0%	0.5%	0.0%	2.0%
Other Braintree Town Centre	10.5%	3.5%	0.4%	0.7%	0.0%	2.0%
Braintree Town Centre Sub-Total	***35.5%***	***10.4%***	***2.1%***	***3.3%***	***0.1%***	
Tesco, Great Notley	18.4%	5.2%	0.4%	0.3%	0.0%	2.0%
Tesco, Marks Farm, Braintree	15.6%	1.2%	0.4%	9.5%	0.0%	2.0%
Lidl, Rayne Road, Braintree	14.1%	5.7%	3.9%	4.2%	0.0%	2.0%
Other Braintree/Zone 1/2	6.2%	3.2%	1.2%	0.0%	0.0%	2.0%
Braintree/Zone 1/2 Total	**89.8%**	**25.7%**	**8.0%**	**17.3%**	**0.1%**	
Witham Town Centre/Other Witham/Zone 3						
Tesco, Grove Centre	0.4%	1.3%	20.5%	0.0%	0.0%	2.0%
Other Witham Town Centre	0.2%	0.0%	1.5%	0.0%	0.0%	2.0%
Witham Town Centre Sub-Total	***0.6%***	***1.3%***	***22.0%***	***0.0%***	***0.0%***	
Morrisons, Braintree Road, Witham	1.9%	0.0%	15.9%	0.1%	0.0%	2.0%
Asda, Highfields Road, Witham	0.1%	0.0%	6.9%	0.0%	0.0%	2.0%
Other Witham/Zone 3	0.9%	0.2%	6.8%	0.2%	1.5%	2.0%
Witham/Zone 3 Total	**3.5%**	**1.5%**	**51.6%**	**0.3%**	**1.5%**	
Halstead Town Centre/Other Halstead/Zone 4/5						
Sainsbury's, High Street	0.3%	0.0%	0.0%	13.3%	0.0%	2.0%
Co-op, Weavers Court	0.0%	0.0%	0.0%	8.1%	0.1%	2.0%
Other Halstead Town Centre	0.0%	0.3%	0.0%	1.4%	0.1%	2.0%
Halstead Town Centre Sub-Total	***0.3%***	***0.3%***	***0.0%***	***22.8%***	***0.2%***	
Other Halstead/Zone 4/5	0.2%	0.0%	0.0%	10.6%	3.4%	2.0%
Halstead/Zone 4/5 Total	**0.5%**	**0.3%**	**0.0%**	**33.4%**	**3.6%**	
Braintree District Total	**93.8%**	**27.5%**	**59.6%**	**51.0%**	**5.2%**	
Chelmsford	3.3%	16.3%	9.0%	0.3%	0.1%	n/a
Colchester	1.5%	0.7%	7.0%	25.4%	3.5%	n/a
Sudbury	0.2%	1.0%	0.1%	20.7%	36.2%	n/a
Haverhill	0.0%	0.3%	0.0%	1.2%	41.2%	n/a
Tiptree	0.0%	0.0%	16.1%	0.6%	0.0%	n/a
Great Dunmow	0.6%	36.5%	0.0%	0.0%	0.0%	n/a
Bishop's Stortford	0.2%	4.7%	0.2%	0.0%	0.0%	n/a
Other	0.4%	13.0%	8.0%	0.8%	13.8%	n/a
Other Sub-Total	**6.2%**	**72.5%**	**40.4%**	**49.0%**	**94.8%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey September 2015

Table 5: Convenience Goods Expenditure 2018 (£m)

Centre/Facility	Zone 1 Braintree	Zone 2 Rural West	Zone 3 Witham	Zone 4 Halstead	Zone 5 Rural North	Inflow	Total
Expenditure 2018	**129.48**	**97.50**	**122.36**	**91.56**	**108.71**		
Braintree Town Centre/Other Braintree/Zone 1/2							
Sainsbury's, Tofts Walk	19.42	3.12	0.86	1.92	0.11	0.52	25.95
Tesco, Market Place	12.95	3.61	1.22	0.46	0.00	0.37	18.61
Other Braintree Town Centre	13.60	3.41	0.49	0.64	0.00	0.37	18.51
Braintree Town Centre Sub-Total	***45.97***	***10.14***	***2.57***	***3.02***	***0.11***	***1.26***	***63.07***
Tesco, Great Notley	23.83	5.07	0.49	0.27	0.00	0.61	30.26
Tesco, Marks Farm, Braintree	20.20	1.17	0.49	8.70	0.00	0.62	31.18
Lidl, Rayne Road, Braintree	18.26	5.56	4.77	3.85	0.00	0.66	33.09
Other Braintree/Zone 1/2	8.03	3.12	1.47	0.00	0.00	0.26	12.87
Braintree/Zone 1/2 Total	**116.28**	**25.06**	**9.79**	**15.84**	**0.11**	**3.41**	**170.48**
Witham Town Centre/Other Witham/Zone 3							
Tesco, Grove Centre	0.52	1.27	25.08	0.00	0.00	0.55	27.42
Other Witham Town Centre	0.26	0.00	1.84	0.00	0.00	0.04	2.14
Witham Town Centre Sub-Total	***0.78***	***1.27***	***26.92***	***0.00***	***0.00***	***0.59***	***29.55***
Morrisons, Braintree Road, Witham	2.46	0.00	19.45	0.09	0.00	0.45	22.46
Asda, Highfields Road, Witham	0.13	0.00	8.44	0.00	0.00	0.17	8.75
Other Witham/Zone 3	1.17	0.20	8.32	0.18	1.63	0.23	11.73
Witham/Zone 3 Total	**4.53**	**1.46**	**63.14**	**0.27**	**1.63**	**1.45**	**72.49**
Halstead Town Centre/Other Halstead/Zone 4/5							
Sainsbury's, High Street	0.39	0.00	0.00	12.18	0.00	0.26	12.82
Co-op, Weavers Court	0.00	0.00	0.00	7.42	0.11	0.15	7.68
Other Halstead Town Centre	0.00	0.29	0.00	1.28	0.11	0.03	1.72
Halstead Town Centre Sub-Total	***0.39***	***0.29***	***0.00***	***20.88***	***0.22***	***0.44***	***22.22***
Other Halstead/Zone 4/5	0.26	0.00	0.00	9.71	3.70	0.28	13.94
Halstead/Zone 4/5 Total	**0.65**	**0.29**	**0.00**	**30.58**	**3.91**	**0.72**	**36.16**
Braintree District Sub-Total	**121.46**	**26.81**	**72.92**	**46.70**	**5.65**	**5.58**	**279.13**
Chelmsford	4.27	15.89	11.01	0.27	0.11	n/a	31.56
Colchester	1.94	0.68	8.56	23.26	3.81	n/a	38.25
Sudbury	0.26	0.98	0.12	18.95	39.35	n/a	59.66
Haverhill	0.00	0.29	0.00	1.10	44.79	n/a	46.18
Tiptree	0.00	0.00	19.70	0.55	0.00	n/a	20.25
Great Dunmow	0.78	35.59	0.00	0.00	0.00	n/a	36.36
Bishop's Stortford	0.26	4.58	0.24	0.00	0.00	n/a	5.09
Other	0.52	12.68	9.79	0.73	15.00	n/a	38.72
Other Sub-Total	**8.03**	**70.69**	**49.43**	**44.87**	**103.06**	**n/a**	**276.07**
TOTAL	**129.48**	**97.50**	**122.36**	**91.56**	**108.71**		**555.20**

Source: Table 3 and 4 *(Please note some figures may not total precisely due to rounding)*

Table 6: Convenience Goods Expenditure 2023 (£m)

Centre/Facility	Zone 1 Braintree	Zone 2 Rural West	Zone 3 Witham	Zone 4 Halstead	Zone 5 Rural North	Inflow	Total
Expenditure 2023	**133.43**	**102.67**	**126.26**	**94.48**	**110.66**		
Braintree Town Centre/Other Braintree/Zone 1/2							
Sainsbury's, Tofts Walk	20.01	3.29	0.88	1.98	0.11	0.54	26.81
Tesco, Market Place	13.34	3.80	1.26	0.47	0.00	0.39	19.26
Other Braintree Town Centre	14.01	3.59	0.51	0.66	0.00	0.38	19.15
Braintree Town Centre Sub-Total	***47.37***	***10.68***	***2.65***	***3.12***	***0.11***	***1.30***	***65.23***
Tesco, Great Notley	24.55	5.34	0.51	0.28	0.00	0.63	31.30
Tesco, Marks Farm, Braintree	20.82	1.23	0.51	8.98	0.00	0.64	32.17
Lidl, Rayne Road, Braintree	18.81	5.85	4.92	3.97	0.00	0.68	34.24
Other Braintree/Zone 1/2	8.27	3.29	1.52	0.00	0.00	0.27	13.34
Braintree/Zone 1/2 Total	**119.82**	**26.39**	**10.10**	**16.34**	**0.11**	**3.53**	**176.29**
Witham Town Centre/Other Witham/Zone 3							
Tesco, Grove Centre	0.53	1.33	25.88	0.00	0.00	0.57	28.32
Other Witham Town Centre	0.27	0.00	1.89	0.00	0.00	0.04	2.20
Witham Town Centre Sub-Total	***0.80***	***1.33***	***27.78***	***0.00***	***0.00***	***0.61***	***30.52***
Morrisons, Braintree Road, Witham	2.54	0.00	20.07	0.09	0.00	0.46	23.17
Asda, Highfields Road, Witham	0.13	0.00	8.71	0.00	0.00	0.18	9.03
Other Witham/Zone 3	1.20	0.21	8.59	0.19	1.66	0.24	12.08
Witham/Zone 3 Total	**4.67**	**1.54**	**65.15**	**0.28**	**1.66**	**1.50**	**74.80**
Halstead Town Centre/Other Halstead/Zone 4/5							
Sainsbury's, High Street	0.40	0.00	0.00	12.57	0.00	0.26	13.23
Co-op, Weavers Court	0.00	0.00	0.00	7.65	0.11	0.16	7.92
Other Halstead Town Centre	0.00	0.31	0.00	1.32	0.11	0.04	1.78
Halstead Town Centre Sub-Total	***0.40***	***0.31***	***0.00***	***21.54***	***0.22***	***0.46***	***22.93***
Other Halstead/Zone 4/5	0.27	0.00	0.00	10.01	3.76	0.29	14.33
Halstead/Zone 4/5 Total	**0.67**	**0.31**	**0.00**	**31.56**	**3.98**	**0.75**	**37.26**
Braintree District Sub-Total	**125.16**	**28.23**	**75.25**	**48.18**	**5.75**	**5.77**	**288.35**
Chelmsford	4.40	16.73	11.36	0.28	0.11	n/a	32.90
Colchester	2.00	0.72	8.84	24.00	3.87	n/a	39.43
Sudbury	0.27	1.03	0.13	19.56	40.06	n/a	61.04
Haverhill	0.00	0.31	0.00	1.13	45.59	n/a	47.03
Tiptree	0.00	0.00	20.33	0.57	0.00	n/a	20.89
Great Dunmow	0.80	37.47	0.00	0.00	0.00	n/a	38.27
Bishop's Stortford	0.27	4.83	0.25	0.00	0.00	n/a	5.34
Other	0.53	13.35	10.10	0.76	15.27	n/a	40.01
Other Sub-Total	**8.27**	**74.43**	**51.01**	**46.29**	**104.91**	**n/a**	**284.92**
TOTAL	**133.43**	**102.67**	**126.26**	**94.48**	**110.66**		**573.26**

Source: Table 3 and 4 *(Please note some figures may not total precisely due to rounding)*

Table 7: Convenience Goods Expenditure 2028 (£m)

Centre/Facility	Zone 1 Braintree	Zone 2 Rural West	Zone 3 Witham	Zone 4 Halstead	Zone 5 Rural North	Inflow	Total
Expenditure 2028	**137.85**	**107.76**	**130.59**	**97.72**	**113.05**		
Braintree Town Centre/Other Braintree/Zone 1/2							
Sainsbury's, Tofts Walk	20.68	3.45	0.91	2.05	0.11	0.56	27.76
Tesco, Market Place	13.78	3.99	1.31	0.49	0.00	0.40	19.97
Other Braintree Town Centre	14.47	3.77	0.52	0.68	0.00	0.40	19.85
Braintree Town Centre Sub-Total	***48.94***	***11.21***	***2.74***	***3.22***	***0.11***	***1.35***	***67.57***
Tesco, Great Notley	25.36	5.60	0.52	0.29	0.00	0.65	32.43
Tesco, Marks Farm, Braintree	21.50	1.29	0.52	9.28	0.00	0.67	33.27
Lidl, Rayne Road, Braintree	19.44	6.14	5.09	4.10	0.00	0.71	35.49
Other Braintree/Zone 1/2	8.55	3.45	1.57	0.00	0.00	0.28	13.84
Braintree/Zone 1/2 Total	**123.79**	**27.69**	**10.45**	**16.91**	**0.11**	**3.65**	**182.60**
Witham Town Centre/Other Witham/Zone 3							
Tesco, Grove Centre	0.55	1.40	26.77	0.00	0.00	0.59	29.31
Other Witham Town Centre	0.28	0.00	1.96	0.00	0.00	0.05	2.28
Witham Town Centre Sub-Total	***0.83***	***1.40***	***28.73***	***0.00***	***0.00***	***0.63***	***31.59***
Morrisons, Braintree Road, Witham	2.62	0.00	20.76	0.10	0.00	0.48	23.96
Asda, Highfields Road, Witham	0.14	0.00	9.01	0.00	0.00	0.19	9.34
Other Witham/Zone 3	1.24	0.22	8.88	0.20	1.70	0.25	12.48
Witham/Zone 3 Total	**4.82**	**1.62**	**67.39**	**0.29**	**1.70**	**1.55**	**77.36**
Halstead Town Centre/Other Halstead/Zone 4/5							
Sainsbury's, High Street	0.41	0.00	0.00	13.00	0.00	0.27	13.68
Co-op, Weavers Court	0.00	0.00	0.00	7.92	0.11	0.16	8.19
Other Halstead Town Centre	0.00	0.32	0.00	1.37	0.11	0.04	1.84
Halstead Town Centre Sub-Total	***0.41***	***0.32***	***0.00***	***22.28***	***0.23***	***0.47***	***23.72***
Other Halstead/Zone 4/5	0.28	0.00	0.00	10.36	3.84	0.30	14.77
Halstead/Zone 4/5 Total	**0.69**	**0.32**	**0.00**	**32.64**	**4.07**	**0.77**	**38.49**
Braintree District Sub-Total	**129.30**	**29.63**	**77.83**	**49.84**	**5.88**	**5.97**	**298.45**
Chelmsford	4.55	17.56	11.75	0.29	0.11	n/a	34.27
Colchester	2.07	0.75	9.14	24.82	3.96	n/a	40.74
Sudbury	0.28	1.08	0.13	20.23	40.93	n/a	62.64
Haverhill	0.00	0.32	0.00	1.17	46.58	n/a	48.07
Tiptree	0.00	0.00	21.03	0.59	0.00	n/a	21.61
Great Dunmow	0.83	39.33	0.00	0.00	0.00	n/a	40.16
Bishop's Stortford	0.28	5.06	0.26	0.00	0.00	n/a	5.60
Other	0.55	14.01	10.45	0.78	15.60	n/a	41.39
Other Sub-Total	**8.55**	**78.12**	**52.76**	**47.88**	**107.17**	**n/a**	**294.49**
TOTAL	**137.85**	**107.76**	**130.59**	**97.72**	**113.05**		**592.94**

Source: Table 3 and 4 *(Please note some figures may not total precisely due to rounding)*

Table 8: Convenience Goods Expenditure 2033 (£m)

Centre/Facility	Zone 1 Braintree	Zone 2 Rural West	Zone 3 Witham	Zone 4 Halstead	Zone 5 Rural North	Inflow	Total
Expenditure 2033	**142.22**	**112.45**	**134.84**	**100.89**	**115.47**		
Braintree Town Centre/Other Braintree/Zone 1/2							
Sainsbury's, Tofts Walk	21.33	3.60	0.94	2.12	0.12	0.57	28.68
Tesco, Market Place	14.22	4.16	1.35	0.50	0.00	0.41	20.65
Other Braintree Town Centre	14.93	3.94	0.54	0.71	0.00	0.41	20.52
Braintree Town Centre Sub-Total	***50.49***	***11.69***	***2.83***	***3.33***	***0.12***	***1.40***	***69.86***
Tesco, Great Notley	26.17	5.85	0.54	0.30	0.00	0.67	33.53
Tesco, Marks Farm, Braintree	22.19	1.35	0.54	9.58	0.00	0.69	34.35
Lidl, Rayne Road, Braintree	20.05	6.41	5.26	4.24	0.00	0.73	36.69
Other Braintree/Zone 1/2	8.82	3.60	1.62	0.00	0.00	0.29	14.32
Braintree/Zone 1/2 Total	**127.71**	**28.90**	**10.79**	**17.45**	**0.12**	**3.77**	**188.74**
Witham Town Centre/Other Witham/Zone 3							
Tesco, Grove Centre	0.57	1.46	27.64	0.00	0.00	0.61	30.28
Other Witham Town Centre	0.28	0.00	2.02	0.00	0.00	0.05	2.35
Witham Town Centre Sub-Total	***0.85***	***1.46***	***29.66***	***0.00***	***0.00***	***0.65***	***32.63***
Morrisons, Braintree Road, Witham	2.70	0.00	21.44	0.10	0.00	0.49	24.74
Asda, Highfields Road, Witham	0.14	0.00	9.30	0.00	0.00	0.19	9.64
Other Witham/Zone 3	1.28	0.22	9.17	0.20	1.73	0.26	12.86
Witham/Zone 3 Total	**4.98**	**1.69**	**69.58**	**0.30**	**1.73**	**1.60**	**79.87**
Halstead Town Centre/Other Halstead/Zone 4/5							
Sainsbury's, High Street	0.43	0.00	0.00	13.42	0.00	0.28	14.13
Co-op, Weavers Court	0.00	0.00	0.00	8.17	0.12	0.17	8.46
Other Halstead Town Centre	0.00	0.34	0.00	1.41	0.12	0.04	1.90
Halstead Town Centre Sub-Total	***0.43***	***0.34***	***0.00***	***23.00***	***0.23***	***0.49***	***24.49***
Other Halstead/Zone 4/5	0.28	0.00	0.00	10.69	3.93	0.30	15.21
Halstead/Zone 4/5 Total	**0.71**	**0.34**	**0.00**	**33.70**	**4.16**	**0.79**	**39.70**
Braintree District Sub-Total	**133.40**	**30.92**	**80.36**	**51.45**	**6.00**	**6.17**	**308.31**
Chelmsford	4.69	18.33	12.14	0.30	0.12	n/a	35.58
Colchester	2.13	0.79	9.44	25.63	4.04	n/a	42.03
Sudbury	0.28	1.12	0.13	20.88	41.80	n/a	64.23
Haverhill	0.00	0.34	0.00	1.21	47.58	n/a	49.12
Tiptree	0.00	0.00	21.71	0.61	0.00	n/a	22.31
Great Dunmow	0.85	41.04	0.00	0.00	0.00	n/a	41.90
Bishop's Stortford	0.28	5.29	0.27	0.00	0.00	n/a	5.84
Other	0.57	14.62	10.79	0.81	15.94	n/a	42.72
Other Sub-Total	**8.82**	**81.53**	**54.47**	**49.44**	**109.47**	**n/a**	**303.72**
TOTAL	**142.22**	**112.45**	**134.84**	**100.89**	**115.47**		**612.03**

Source: Table 3 and 4 *(Please note some figures may not total precisely due to rounding)*

Table 9: Convenience Goods Floorspace and Benchmark Turnover 2018

Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Braintree Town Centre					
Sainsbury's, Tofts Walk	2,800	75%	2,100	£11,068	£23.24
Tesco, Market Place	2,936	80%	2,349	£12,221	£28.70
Iceland, Bank Street	891	95%	846	£6,451	£5.46
B&M Bargains	1,225	80%	980	£3,003	£2.94
Other Braintree Town Centre	1,029	100%	1,029	£5,000	£5.15
Braintree Town Centre Sub-Total	**8,881**		**7,304**		**£65.50**
Other Braintree/Zone 1/2					
Lidl, Rayne Road, Braintree	1,234	80%	987	£8,661	£8.55
Tesco Express, Coggeshall Road, Braintree	254	95%	241	£12,221	£2.95
Tesco, Marks Farm, Braintree	3,669	70%	2,568	£12,221	£31.39
Marks & Spencer Simply Food, Braintree Retail Park	707	95%	672	£11,283	£7.58
Co-op, Challis Lane, Braintree	270	95%	257	£10,298	£2.64
McColls, Panfield Lane, Braintree	111	95%	105	£5,000	£0.53
Co-op, Masefield Road, Braintree	346	95%	329	£10,298	£3.38
Co-op, Mountbatten Road, Braintree	81	95%	77	£10,298	£0.79
Co-op, Cressing Road, Braintree	162	95%	154	£10,298	£1.58
Tesco, Great Notley	2,873	95%	2,729	£12,221	£33.36
Marks & Spencer Simply Food BP, Notley Cross	84	95%	80	£11,283	£0.90
Co-op, Priory Lane, Great Notley	126	95%	120	£10,298	£1.23
Co-op, Bocking Churchstreet	163	95%	155	£10,298	£1.59
Co-op, Brook Street, Great Bardfield	139	95%	132	£10,298	£1.36
Co-op, Braintree Bypass	84	95%	80	£10,298	£0.82
Other Braintree/Zone 1/2 Sub-Total	**10,303**		**8,686**		**£98.66**
Witham Town Centre					
Tesco, Grove Centre	2,313	80%	1,850	£12,221	£22.61
Iceland, Newland Shopping Centre	291	95%	276	£6,451	£1.78
Other Witham Town Centre	889	100%	889	£5,000	£4.45
Witham Town Centre Sub-Total	**3,493**		**3,016**		**£28.84**
Other Witham/Zone 3					
Aldi, Reid Road, Witham	1,059	85%	900	£11,145	£10.03
Morrisons, Braintree Road, Witham	2,578	80%	2,062	£12,369	£25.51
Asda, Highfields Road, Witham	1,027	80%	822	£13,317	£10.94
Co-op, London Road, Witham	84	95%	80	£10,298	£0.82
McColls, Laurence Avenue, Witham	67	95%	64	£5,000	£0.32
Co-op, Spa Road, Witham	235	95%	223	£10,298	£2.30
Co-op, Broadway, Silver End	346	95%	329	£10,298	£3.38
Co-op, The Street, Hatfield Peverel	269	95%	256	£10,298	£2.63
Co-op, High Street, Kelvedon	262	95%	249	£10,298	£2.56
Other Witham/Zone 3 Sub-Total	**5,927**		**4,984**		**£58.50**
Halstead Town Centre					
Sainsbury's, High Street	1,047	85%	890	£11,068	£9.85
Co-op, Weavers Court	1,896	70%	1,327	£10,298	£13.67
Other Halstead Town Centre	595	100%	595	£5,000	£2.98
Lidl, Kings Road, Halstead	1,038	85%	882	£8,661	£7.64
Halstead Town Centre Sub-Total	**4,576**		**3,694**		**£34.13**
Other Halstead/Zone 4					
Co-op, Colchester Road, Halstead	346	95%	329	£10,298	£3.38
Co-op, Abels Road, Halstead	119	95%	113	£10,298	£1.16
Co-op, Swan Street, Sible Hedingham	336	95%	319	£10,298	£3.29
Co-op, High Street, Earls Colne	341	95%	324	£10,298	£3.34
Co-op, East Street, Coggeshall	346	95%	329	£10,298	£3.38
McColls, Church Street, Coggeshall	62	95%	59	£5,000	£0.29
Co-op, Doubleday Corner, Coggeshall	74	95%	70	£10,298	£0.72
Other Halstead/Zone 4 Sub-Total	**1,624**		**1,543**		**£15.58**
Braintree District Total	**34,804**		**29,227**		**£301.21**

Source: ORC StorePoint, Goad and Global Data 2017 (Please note some figures may not total precisely due to rounding)

Table 10: Summary of Convenience Goods Expenditure 2018 to 2033

Area	2018	2023	2028	2033
Available Expenditure in Braintree District (£m)				
Braintree	170.48	176.29	182.60	188.74
Witham	72.49	74.80	77.36	79.87
Halstead	36.16	37.26	38.49	39.70
Total	**279.13**	**288.35**	**298.45**	**308.31**
Turnover of Existing Facilities (£m)				
Braintree	164.16	164.16	164.16	164.16
Witham	87.34	87.34	87.34	87.34
Halstead	49.71	49.71	49.71	49.71
Total	**301.21**	**301.21**	**301.21**	**301.21**
Surplus/Deficit Expenditure (£m)				
Braintree	6.32	12.13	18.44	24.58
Witham	-14.86	-12.55	-9.98	-7.47
Halstead	-13.55	-12.45	-11.22	-10.01
Total	**-22.08**	**-12.86**	**-2.76**	**7.10**

Source: Tables 5 to 9
Notes:
No growth in convenience goods sales efficiency applied to turnover of existing facilities
Please note some figures may not total precisely due to rounding

Table 11: Convenience Goods Floorspace Expenditure Capacity 2018 to 2033

Area	2018	2023	2028	2033
Turnover Density New Floorspace (£ per sq.m)	£12,000	£12,000	£12,000	£12,000
Floorspace Requirement (sq.m net)				
Braintree	527	1,011	1,537	2,049
Witham	-1,238	-1,046	-832	-623
Halstead	-1,129	-1,037	-935	-834
Total	**-1,840**	**-1,072**	**-230**	**592**
Floorspace Requirement (sq.m gross)				
Braintree	753	1,444	2,196	2,927
Witham	-1,769	-1,494	-1,188	-890
Halstead	-1,613	-1,482	-1,336	-1,192
Total	**-2,629**	**-1,531**	**-328**	**845**

(Please note some figures may not total precisely due to rounding)

Appendix 3: Comparison Goods Capacity

Table 1: Study Area Population

Zone	2011	2018	2023	2028	2033
Zone 1 - Braintree	60,008	62,867	65,195	67,440	69,522
Zone 2 - Rural West	39,809	43,599	46,201	48,552	50,627
Zone 3 - Witham	54,496	57,504	59,713	61,842	63,802
Zone 4 - Halstead	39,374	41,513	43,108	44,644	46,055
Zone 5 - Rural North	48,995	49,658	50,868	52,034	53,106
Total	**242,682**	**255,141**	**265,084**	**274,512**	**283,112**

Sources: *Experian 2011 Census of Population*
ONS 2014-Based Subnational Population Projections

Table 2: Comparison Goods Expenditure per person (£)

Zone	2018	2023	2028	2033
Zone 1 - Braintree	3,155	3,567	4,166	4,859
Zone 2 - Rural West	3,623	4,097	4,784	5,579
Zone 3 - Witham	3,197	3,615	4,221	4,923
Zone 4 - Halstead	3,299	3,730	4,356	5,081
Zone 5 - Rural North	3,194	3,612	4,218	4,919

Sources:
Experian Local Expenditure 2016 (2016 prices)
Growth Rates: 2.3% 2016-2017, 0.9% 2017-2018, 2.1% 2018-2019 and 3.2% p.a. from 2019
Excludes Special Forms of Trading

Table 3: Total Comparison Goods Expenditure (£m)

Zone	2018	2023	2028	2033
Zone 1 - Braintree	198.35	232.58	280.95	337.78
Zone 2 - Rural West	157.96	189.27	232.27	282.47
Zone 3 - Witham	183.84	215.85	261.05	314.11
Zone 4 - Halstead	136.96	160.81	194.47	233.99
Zone 5 - Rural North	158.62	183.73	219.47	261.24
Total	**835.73**	**982.24**	**1,188.20**	**1,429.60**

Source: Tables 1 and 2

Table 4: Base Year 2018 Comparison Goods Market Shares (%)

Centre/Facility	Zone 1 Braintree	Zone 2 Rural West	Zone 3 Witham	Zone 4 Halstead	Zone 5 Rural North	% Inflow
Braintree/Zone 1/2						
Braintree Town Centre	25.4%	9.4%	4.6%	8.5%	0.1%	10.0%
Freeport Outlet Shopping Centre	11.1%	8.6%	6.2%	6.0%	3.3%	30.0%
Braintree Retail Park	5.6%	3.3%	2.0%	2.3%	1.2%	5.0%
Other Braintree/Zone 1/2	0.3%	0.6%	0.1%	0.8%	0.0%	2.0%
Braintree/Zone 1/2 Total	**42.4%**	**21.9%**	**12.9%**	**17.6%**	**4.6%**	
Witham/Zone 3						
Witham Town Centre	0.5%	0.0%	8.9%	0.0%	0.0%	5.0%
Other Witham/Zone 3	0.1%	0.1%	0.2%	0.1%	0.0%	2.0%
Witham/Zone 3 Total	**0.6%**	**0.1%**	**9.1%**	**0.1%**	**0.0%**	
Halstead/Zone 4						
Halstead Town Centre	0.5%	0.0%	0.0%	6.9%	0.5%	2.0%
Other Halstead/Zone 4	0.1%	0.0%	0.0%	0.4%	0.1%	2.0%
Halstead/Zone 4 Total	**0.6%**	**0.0%**	**0.0%**	**7.3%**	**0.6%**	
Braintree District Total	**43.6%**	**22.0%**	**22.0%**	**25.0%**	**5.2%**	
Chelmsford	24.1%	29.0%	29.3%	4.2%	1.1%	n/a
Colchester	7.8%	0.3%	19.5%	32.4%	3.2%	n/a
Cambridge	0.6%	11.2%	0.0%	2.9%	24.1%	n/a
Sudbury	0.0%	0.3%	0.1%	10.9%	17.7%	n/a
Tollgate Retail Park, Colchester	8.9%	0.2%	10.2%	17.1%	1.4%	n/a
Chelmer Retail Park, Chelmsford	5.4%	11.7%	9.1%	0.0%	0.4%	n/a
Lakeside, Thurrock	4.1%	2.3%	1.2%	0.8%	0.8%	n/a
Bluewater, Dartford	1.1%	1.1%	0.6%	0.5%	0.1%	n/a
Other	4.4%	21.9%	8.0%	6.2%	46.0%	n/a
Other Sub-Total	**56.4%**	**78.0%**	**78.0%**	**75.0%**	**94.8%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey September 2015

Table 5: Comparison Goods Expenditure 2018 (£m)

Centre/Facility	Zone 1 Braintree	Zone 2 Rural West	Zone 3 Witham	Zone 4 Halstead	Zone 5 Rural North	Inflow	Total
Expenditure 2018	**198.35**	**157.96**	**183.84**	**136.96**	**158.62**		
Braintree/Zone 1/2							
Braintree Town Centre	50.38	14.85	8.46	11.64	0.16	9.50	94.98
Freeport Outlet Shopping Centre	22.02	13.58	11.40	8.22	5.23	25.91	86.36
Braintree Retail Park	11.11	5.21	3.68	3.15	1.90	1.32	26.37
Other Braintree/Zone 1/2	0.60	0.95	0.18	1.10	0.00	0.06	2.88
Braintree/Zone 1/2 Total	**84.10**	**34.59**	**23.71**	**24.10**	**7.30**	**36.78**	**210.59**
Witham/Zone 3							
Witham Town Centre	0.99	0.00	16.36	0.00	0.00	0.91	18.27
Other Witham/Zone 3	0.20	0.16	0.37	0.14	0.00	0.02	0.88
Witham/Zone 3 Total	**1.19**	**0.16**	**16.73**	**0.14**	**0.00**	**0.93**	**19.15**
Halstead/Zone 4							
Halstead Town Centre	0.99	0.00	0.00	9.45	0.79	0.23	11.46
Other Halstead/Zone 4	0.20	0.00	0.00	0.55	0.16	0.02	0.92
Halstead/Zone 4 Total	**1.19**	**0.00**	**0.00**	**10.00**	**0.95**	**0.25**	**12.39**
Braintree District Total	**86.48**	**34.75**	**40.44**	**34.24**	**8.25**	**37.96**	**242.12**
Chelmsford	47.80	45.81	53.86	5.75	1.74	n/a	154.97
Colchester	15.47	0.47	35.85	44.37	5.08	n/a	101.24
Cambridge	1.19	17.69	0.00	3.97	38.23	n/a	61.08
Sudbury	0.00	0.47	0.18	14.93	28.08	n/a	43.66
Tollgate Retail Park, Colchester	17.65	0.32	18.75	23.42	2.22	n/a	62.36
Chelmer Retail Park, Chelmsford	10.71	18.48	16.73	0.00	0.63	n/a	46.56
Lakeside, Thurrock	8.13	3.63	2.21	1.10	1.27	n/a	16.34
Bluewater, Dartford	2.18	1.74	1.10	0.68	0.16	n/a	5.87
Other	8.73	34.59	14.71	8.49	72.97	n/a	139.49
Other Sub-Total	**111.87**	**123.21**	**143.39**	**102.72**	**150.38**	**n/a**	**631.57**
TOTAL	**198.35**	**157.96**	**183.84**	**136.96**	**158.62**		**873.69**

Source: Table 3 and 4 *(Please note some figures may not total precisely due to rounding)*

Table 6: Comparison Goods Expenditure 2023 (£m)

Centre/Facility	Zone 1 Braintree	Zone 2 Rural West	Zone 3 Witham	Zone 4 Halstead	Zone 5 Rural North	Inflow	Total
Expenditure 2023	**232.58**	**189.27**	**215.85**	**160.81**	**183.73**		
Braintree/Zone 1/2							
Braintree Town Centre	59.08	17.79	9.93	13.67	0.18	11.18	111.83
Freeport Outlet Shopping Centre	25.82	16.28	13.38	9.65	6.06	30.51	101.70
Braintree Retail Park	13.02	6.25	4.32	3.70	2.20	1.55	31.04
Other Braintree/Zone 1/2	0.70	1.14	0.22	1.29	0.00	0.07	3.40
Braintree/Zone 1/2 Total	**98.61**	**41.45**	**27.84**	**28.30**	**8.45**	**43.31**	**247.98**
Witham/Zone 3							
Witham Town Centre	1.16	0.00	19.21	0.00	0.00	1.07	21.45
Other Witham/Zone 3	0.23	0.19	0.43	0.16	0.00	0.02	1.04
Witham/Zone 3 Total	**1.40**	**0.19**	**19.64**	**0.16**	**0.00**	**1.09**	**22.48**
Halstead/Zone 4							
Halstead Town Centre	1.16	0.00	0.00	11.10	0.92	0.27	13.45
Other Halstead/Zone 4	0.23	0.00	0.00	0.64	0.18	0.02	1.08
Halstead/Zone 4 Total	**1.40**	**0.00**	**0.00**	**11.74**	**1.10**	**0.29**	**14.53**
Braintree District Total	**101.40**	**41.64**	**47.49**	**40.20**	**9.55**	**44.70**	**284.98**
Chelmsford	56.05	54.89	63.24	6.75	2.02	n/a	182.96
Colchester	18.14	0.57	42.09	52.10	5.88	n/a	118.78
Cambridge	1.40	21.20	0.00	4.66	44.28	n/a	71.54
Sudbury	0.00	0.57	0.22	17.53	32.52	n/a	50.83
Tollgate Retail Park, Colchester	20.70	0.38	22.02	27.50	2.57	n/a	73.17
Chelmer Retail Park, Chelmsford	12.56	22.14	19.64	0.00	0.73	n/a	55.08
Lakeside, Thurrock	9.54	4.35	2.59	1.29	1.47	n/a	19.24
Bluewater, Dartford	2.56	2.08	1.30	0.80	0.18	n/a	6.92
Other	10.23	41.45	17.27	9.97	84.52	n/a	163.44
Other Sub-Total	**131.17**	**147.63**	**168.36**	**120.61**	**174.18**	**n/a**	**741.95**
TOTAL	**232.58**	**189.27**	**215.85**	**160.81**	**183.73**		**1,026.94**

Source: Table 3 and 4 *(Please note some figures may not total precisely due to rounding)*

Table 7: Comparison Goods Expenditure 2028 (£m)

Centre/Facility	Zone 1 Braintree	Zone 2 Rural West	Zone 3 Witham	Zone 4 Halstead	Zone 5 Rural North	Inflow	Total
Expenditure 2028	**280.95**	**232.27**	**261.05**	**194.47**	**219.47**		
Braintree/Zone 1/2							
Braintree Town Centre	71.36	21.83	12.01	16.53	0.22	13.55	135.50
Freeport Outlet Shopping Centre	31.18	19.98	16.19	11.67	7.24	36.97	123.22
Braintree Retail Park	15.73	7.66	5.22	4.47	2.63	1.88	37.61
Other Braintree/Zone 1/2	0.84	1.39	0.26	1.56	0.00	0.08	4.14
Braintree/Zone 1/2 Total	**119.12**	**50.87**	**33.68**	**34.23**	**10.10**	**52.48**	**300.47**
Witham/Zone 3							
Witham Town Centre	1.40	0.00	23.23	0.00	0.00	1.30	25.93
Other Witham/Zone 3	0.28	0.23	0.52	0.19	0.00	0.03	1.25
Witham/Zone 3 Total	**1.69**	**0.23**	**23.76**	**0.19**	**0.00**	**1.32**	**27.19**
Halstead/Zone 4							
Halstead Town Centre	1.40	0.00	0.00	13.42	1.10	0.32	16.25
Other Halstead/Zone 4	0.28	0.00	0.00	0.78	0.22	0.03	1.30
Halstead/Zone 4 Total	**1.69**	**0.00**	**0.00**	**14.20**	**1.32**	**0.35**	**17.55**
Braintree District Total	**122.49**	**51.10**	**57.43**	**48.62**	**11.41**	**54.15**	**345.21**
Chelmsford	67.71	67.36	76.49	8.17	2.41	n/a	222.13
Colchester	21.91	0.70	50.90	63.01	7.02	n/a	143.55
Cambridge	1.69	26.01	0.00	5.64	52.89	n/a	86.23
Sudbury	0.00	0.70	0.26	21.20	38.85	n/a	61.00
Tollgate Retail Park, Colchester	25.00	0.46	26.63	33.25	3.07	n/a	88.42
Chelmer Retail Park, Chelmsford	15.17	27.18	23.76	0.00	0.88	n/a	66.98
Lakeside, Thurrock	11.52	5.34	3.13	1.56	1.76	n/a	23.31
Bluewater, Dartford	3.09	2.55	1.57	0.97	0.22	n/a	8.40
Other	12.36	50.87	20.88	12.06	100.95	n/a	197.12
Other Sub-Total	**158.45**	**181.17**	**203.62**	**145.85**	**208.05**	**n/a**	**897.15**
TOTAL	**280.95**	**232.27**	**261.05**	**194.47**	**219.47**		**1,242.35**

Source: Table 3 and 4 *(Please note some figures may not total precisely due to rounding)*

Table 8: Comparison Goods Expenditure 2033 (£m)

Centre/Facility	Zone 1 Braintree	Zone 2 Rural West	Zone 3 Witham	Zone 4 Halstead	Zone 5 Rural North	Inflow	Total
Expenditure 2033	**337.78**	**282.47**	**314.11**	**233.99**	**261.24**		
Braintree/Zone 1/2							
Braintree Town Centre	85.80	26.55	14.45	19.89	0.26	16.33	163.28
Freeport Outlet Shopping Centre	37.49	24.29	19.47	14.04	8.62	44.54	148.46
Braintree Retail Park	18.92	9.32	6.28	5.38	3.13	2.27	45.30
Other Braintree/Zone 1/2	1.01	1.69	0.31	1.87	0.00	0.10	4.99
Braintree/Zone 1/2 Total	**143.22**	**61.86**	**40.52**	**41.18**	**12.02**	**63.23**	**362.03**
Witham/Zone 3							
Witham Town Centre	1.69	0.00	27.96	0.00	0.00	1.56	31.21
Other Witham/Zone 3	0.34	0.28	0.63	0.23	0.00	0.03	1.51
Witham/Zone 3 Total	**2.03**	**0.28**	**28.58**	**0.23**	**0.00**	**1.59**	**32.72**
Halstead/Zone 4							
Halstead Town Centre	1.69	0.00	0.00	16.15	1.31	0.39	19.53
Other Halstead/Zone 4	0.34	0.00	0.00	0.94	0.26	0.03	1.57
Halstead/Zone 4 Total	**2.03**	**0.00**	**0.00**	**17.08**	**1.57**	**0.42**	**21.10**
Braintree District Total	**147.27**	**62.14**	**69.10**	**58.50**	**13.58**	**65.24**	**415.85**
Chelmsford	81.41	81.92	92.03	9.83	2.87	n/a	268.06
Colchester	26.35	0.85	61.25	75.81	8.36	n/a	172.62
Cambridge	2.03	31.64	0.00	6.79	62.96	n/a	103.41
Sudbury	0.00	0.85	0.31	25.50	46.24	n/a	72.91
Tollgate Retail Park, Colchester	30.06	0.56	32.04	40.01	3.66	n/a	106.34
Chelmer Retail Park, Chelmsford	18.24	33.05	28.58	0.00	1.04	n/a	80.92
Lakeside, Thurrock	13.85	6.50	3.77	1.87	2.09	n/a	28.08
Bluewater, Dartford	3.72	3.11	1.88	1.17	0.26	n/a	10.14
Other	14.86	61.86	25.13	14.51	120.17	n/a	236.53
Other Sub-Total	**190.51**	**220.33**	**245.01**	**175.49**	**247.66**	**n/a**	**1,078.99**
TOTAL	**337.78**	**282.47**	**314.11**	**233.99**	**261.24**		**1,494.84**

Source: Table 3 and 4 *(Please note some figures may not total precisely due to rounding)*

Table 9: Comparison Goods Floorspace 2018

Centre	Sales Floorspace (sq.m net)
Braintree Town Centre	12,915
Braintree Food Stores (non-food sales floorspace)	3,137
Freeport Outlet Shopping Centre	14,307
Braintree Retail Park	7,514
Witham Town Centre	6,419
Witham Food Stores (non-food sales floorspace)	1,380
Halstead Town Centre	4,151
Halstead Food Stores (non-food sales floorspace)	778
Braintree District Total	**50,601**

Source: Goad, Completely Retail and ORC StorePoint

Table 10: Comparison Goods Commitments/Proposals, 2018

Store	Comparison Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Erection of DIY retail warehouse (B&Q), Millennium Way	5,168	£1,850	£9.56
Uplift in turnover from relocation of B&Q			£3.97
Extension to existing Next store, Braintree Retail Park	1,457	£3,380	£4.92
Total	**6,625**		**£18.46**

Source: Braintree District Council
Notes:
[1] *LPA ref. 13/01476/FUL, approved 29/09/17*
[2] *LPA ref. 17/01799/FUL, pending determination*

Table 11: Summary of Comparison Goods Expenditure 2018 to 2033

Area	2018	2023	2028	2033
Available Expenditure in Braintree District (£m)				
Braintree	97.86	115.24	139.64	168.27
Freeport/Braintree Retail Park	112.73	132.74	160.83	193.76
Witham	19.15	22.48	27.19	32.72
Halstead	12.39	14.53	17.55	21.10
Total	**242.12**	**284.98**	**345.21**	**415.85**
Turnover of Existing Facilities (£m)				
Braintree	97.86	107.62	120.11	133.91
Freeport/Braintree Retail Park	112.73	144.26	161.00	179.51
Witham	19.15	21.05	23.50	26.20
Halstead	12.39	13.62	15.20	16.95
Total	**242.12**	**286.55**	**319.81**	**356.57**
Surplus/Deficit Expenditure (£m)				
Braintree	0.00	7.62	19.53	34.36
Freeport/Braintree Retail Park	0.00	-11.52	-0.17	14.26
Witham	0.00	1.43	3.69	6.52
Halstead	0.00	0.91	2.35	4.15
Total	**0.00**	**-1.57**	**25.40**	**59.28**

Source: Tables 5 to 10
Notes:
Growth in comparison goods sales efficiency applied to turnover of existing facilities (0.9% 2018-2019, 1.8% 2019-2020, 2.3% p.a. 2020-2024 and 2.2% p.a. from 2024)
Commitments from Table 10 added to the turnover of Freeport/Braintree Retail Park at 2023
Please note some figures may not total precisely due to rounding

Table 12: Comparison Goods Floorspace Expenditure Capacity 2018 to 2033

Area	2018	2023	2028	2033
Turnover Density New Floorspace (£ per sq.m)	£6,000	£6,598	£7,364	£8,210
Floorspace Requirement (sq.m net)				
Braintree	0	1,154	2,652	4,185
Freeport/Braintree Retail Park	0	-1,746	-23	1,736
Witham	0	216	502	794
Halstead	0	137	319	505
Total	**0**	**-238**	**3,449**	**7,220**
Floorspace Requirement (sq.m gross)				
Braintree	0	1,649	3,789	5,978
Freeport/Braintree Retail Park	0	-2,494	-33	2,480
Witham	0	309	717	1,135
Halstead	0	196	455	721
Total	**0**	**-340**	**4,928**	**10,315**

Appendix 4: Food and Beverage Capacity

Table 1: Study Area Population

Zone	2011	2018	2023	2028	2033
Zone 1 - Braintree	60,008	62,867	65,195	67,440	69,522
Zone 2 - Rural West	39,809	43,599	46,201	48,552	50,627
Zone 3 - Witham	54,496	57,504	59,713	61,842	63,802
Zone 4 - Halstead	39,374	41,513	43,108	44,644	46,055
Zone 5 - Rural North	48,995	49,658	50,868	52,034	53,106
Total	**242,682**	**255,141**	**265,084**	**274,512**	**283,112**

Sources: *Experian 2011 Census of Population*
ONS 2014-Based Subnational Population Projections

Table 2: Food & Beverage Goods Expenditure per person (£)

Zone	2018	2023	2028	2033
Zone 1 - Braintree	1,143	1,204	1,277	1,355
Zone 2 - Rural West	1,205	1,269	1,346	1,429
Zone 3 - Witham	1,147	1,208	1,281	1,360
Zone 4 - Halstead	1,166	1,228	1,302	1,382
Zone 5 - Rural North	1,136	1,197	1,269	1,347

Sources:
Experian Local Expenditure 2016 (2016 prices)
Growth Rates: 0.3% 2016-2017, -0.1% 2017-2018, 0.8% 2018-2019, 1.1% p.a. 2019-2024 and 1.2% p.a. from 2024

Table 3: Total Food & Beverage Goods Expenditure (£m)

Zone	2018	2023	2028	2033
Zone 1 - Braintree	71.87	78.49	86.10	94.21
Zone 2 - Rural West	52.55	58.65	65.35	72.34
Zone 3 - Witham	65.97	72.14	79.23	86.76
Zone 4 - Halstead	48.42	52.95	58.15	63.67
Zone 5 - Rural North	56.42	60.87	66.02	71.53
Total	**295.24**	**323.10**	**354.86**	**388.51**

Source: Tables 1 and 2

Table 4: Base Year 2018 Food & Beverage Goods Market Shares (%)

Centre/Facility	Zone 1 Braintree	Zone 2 Rural West	Zone 3 Witham	Zone 4 Halstead	Zone 5 Rural North	% Inflow
Braintree/Zone 1/2						
Braintree Town Centre	62.1%	10.6%	6.3%	6.1%	2.6%	10.0%
Freeport Outlet Shopping Centre/Braintree Retail Park	13.7%	2.7%	7.0%	1.5%	2.2%	30.0%
Other Braintree/Zone 1/2	5.8%	4.5%	2.0%	0.5%	1.8%	2.0%
Braintree/Zone 1/2 Total	**81.6%**	**17.8%**	**15.3%**	**8.1%**	**6.6%**	
Witham/Zone 3						
Witham Town Centre	0.1%	0.0%	40.1%	1.2%	0.0%	5.0%
Other Witham/Zone 3	0.6%	1.5%	13.4%	0.0%	0.0%	2.0%
Witham/Zone 3 Total	**0.7%**	**1.5%**	**53.5%**	**1.2%**	**0.0%**	
Halstead/Zone 4						
Halstead Town Centre	0.0%	1.0%	0.0%	24.4%	2.5%	2.0%
Other Halstead/Zone 4	0.4%	0.0%	0.0%	25.4%	7.2%	2.0%
Halstead/Zone 4 Total	**0.4%**	**1.0%**	**0.0%**	**49.8%**	**9.7%**	
Braintree District Total	**82.7%**	**20.3%**	**68.8%**	**59.1%**	**16.3%**	
Chelmsford	7.7%	12.2%	6.8%	0.3%	0.4%	n/a
Colchester	1.6%	0.0%	6.3%	23.5%	0.0%	n/a
Sudbury	0.5%	0.0%	0.0%	7.5%	18.9%	n/a
Haverhill	0.0%	1.1%	0.0%	0.0%	32.2%	n/a
Tiptree	0.2%	0.0%	7.5%	0.0%	0.0%	n/a
Great Dunmow	0.2%	38.6%	0.0%	0.0%	0.8%	n/a
Bishop's Stortford	0.0%	0.9%	0.0%	0.0%	0.0%	n/a
Other	7.1%	26.9%	10.6%	9.6%	31.4%	n/a
Other Sub-Total	**17.3%**	**79.7%**	**31.2%**	**40.9%**	**83.7%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey September 2015

Table 5: Food & Beverage Goods Expenditure 2018 (£m)

Centre/Facility	Zone 1 Braintree	Zone 2 Rural West	Zone 3 Witham	Zone 4 Halstead	Zone 5 Rural North	Inflow	Total
Expenditure 2018	**71.87**	**52.55**	**65.97**	**48.42**	**56.42**		
Braintree/Zone 1/2							
Braintree Town Centre	44.63	5.57	4.16	2.95	1.47	6.53	65.31
Freeport Outlet Shopping Centre/Braintree Retail Park	9.85	1.42	4.62	0.73	1.24	7.65	25.50
Other Braintree/Zone 1/2	4.17	2.36	1.32	0.24	1.02	0.19	9.30
Braintree/Zone 1/2 Total	**58.65**	**9.35**	**10.09**	**3.92**	**3.72**	**14.37**	**100.11**
Witham/Zone 3							
Witham Town Centre	0.07	0.00	26.46	0.58	0.00	1.43	28.53
Other Witham/Zone 3	0.43	0.79	8.84	0.00	0.00	0.21	10.27
Witham/Zone 3 Total	**0.50**	**0.79**	**35.30**	**0.58**	**0.00**	**1.63**	**38.80**
Halstead/Zone 4							
Halstead Town Centre	0.00	0.53	0.00	11.81	1.41	0.28	14.03
Other Halstead/Zone 4	0.29	0.00	0.00	12.30	4.06	0.34	16.99
Halstead/Zone 4 Total	**0.29**	**0.53**	**0.00**	**24.11**	**5.47**	**0.62**	**31.02**
Braintree District Total	**59.44**	**10.67**	**45.39**	**28.62**	**9.20**	**16.62**	**169.93**
Chelmsford	5.53	6.41	4.49	0.15	0.23	n/a	16.80
Colchester	1.15	0.00	4.16	11.38	0.00	n/a	16.68
Sudbury	0.36	0.00	0.00	3.63	10.66	n/a	14.65
Haverhill	0.00	0.58	0.00	0.00	18.17	n/a	18.75
Tiptree	0.14	0.00	4.95	0.00	0.00	n/a	5.09
Great Dunmow	0.14	20.29	0.00	0.00	0.45	n/a	20.88
Bishop's Stortford	0.00	0.47	0.00	0.00	0.00	n/a	0.47
Other	5.10	14.14	6.99	4.65	17.72	n/a	48.60
Other Sub-Total	**12.43**	**41.89**	**20.58**	**19.80**	**47.23**	**n/a**	**141.93**
TOTAL	**71.87**	**52.55**	**65.97**	**48.42**	**56.42**		**311.86**

Source: Table 3 and 4

(Please note some figures may not total precisely due to rounding)

Table 6: Food & Beverage Goods Expenditure 2023 (£m)

Centre/Facility	Zone 1 Braintree	Zone 2 Rural West	Zone 3 Witham	Zone 4 Halstead	Zone 5 Rural North	Inflow	Total
Expenditure 2023	**78.49**	**58.65**	**72.14**	**52.95**	**60.87**		
Braintree/Zone 1/2							
Braintree Town Centre	48.74	6.22	4.55	3.23	1.58	7.15	71.46
Freeport Outlet Shopping Centre/Braintree Retail Park	10.75	1.58	5.05	0.79	1.34	8.37	27.89
Other Braintree/Zone 1/2	4.55	2.64	1.44	0.26	1.10	0.20	10.20
Braintree/Zone 1/2 Total	**64.05**	**10.44**	**11.04**	**4.29**	**4.02**	**15.72**	**109.55**
Witham/Zone 3							
Witham Town Centre	0.08	0.00	28.93	0.64	0.00	1.56	31.20
Other Witham/Zone 3	0.47	0.88	9.67	0.00	0.00	0.22	11.24
Witham/Zone 3 Total	**0.55**	**0.88**	**38.60**	**0.64**	**0.00**	**1.79**	**42.45**
Halstead/Zone 4							
Halstead Town Centre	0.00	0.59	0.00	12.92	1.52	0.31	15.33
Other Halstead/Zone 4	0.31	0.00	0.00	13.45	4.38	0.37	18.52
Halstead/Zone 4 Total	**0.31**	**0.59**	**0.00**	**26.37**	**5.90**	**0.68**	**33.85**
Braintree District Total	**64.91**	**11.91**	**49.64**	**31.29**	**9.92**	**18.18**	**185.85**
Chelmsford	6.04	7.15	4.91	0.16	0.24	n/a	18.51
Colchester	1.26	0.00	4.55	12.44	0.00	n/a	18.24
Sudbury	0.39	0.00	0.00	3.97	11.50	n/a	15.87
Haverhill	0.00	0.65	0.00	0.00	19.60	n/a	20.24
Tiptree	0.16	0.00	5.41	0.00	0.00	n/a	5.57
Great Dunmow	0.16	22.64	0.00	0.00	0.49	n/a	23.28
Bishop's Stortford	0.00	0.53	0.00	0.00	0.00	n/a	0.53
Other	5.57	15.78	7.65	5.08	19.11	n/a	53.19
Other Sub-Total	**13.58**	**46.74**	**22.51**	**21.66**	**50.95**	**n/a**	**155.43**
TOTAL	**78.49**	**58.65**	**72.14**	**52.95**	**60.87**		**341.28**

Source: Table 3 and 4
(Please note some figures may not total precisely due to rounding)

Table 7: Food & Beverage Goods Expenditure 2028 (£m)

Centre/Facility	Zone 1 Braintree	Zone 2 Rural West	Zone 3 Witham	Zone 4 Halstead	Zone 5 Rural North	Inflow	Total
Expenditure 2028	**86.10**	**65.35**	**79.23**	**58.15**	**66.02**		
Braintree/Zone 1/2							
Braintree Town Centre	53.47	6.93	4.99	3.55	1.72	7.85	78.50
Freeport Outlet Shopping Centre/Braintree Retail Park	11.80	1.76	5.55	0.87	1.45	9.18	30.62
Other Braintree/Zone 1/2	4.99	2.94	1.58	0.29	1.19	0.22	11.22
Braintree/Zone 1/2 Total	**70.26**	**11.63**	**12.12**	**4.71**	**4.36**	**17.26**	**120.34**
Witham/Zone 3							
Witham Town Centre	0.09	0.00	31.77	0.70	0.00	1.71	34.27
Other Witham/Zone 3	0.52	0.98	10.62	0.00	0.00	0.25	12.36
Witham/Zone 3 Total	**0.60**	**0.98**	**42.39**	**0.70**	**0.00**	**1.96**	**46.63**
Halstead/Zone 4							
Halstead Town Centre	0.00	0.65	0.00	14.19	1.65	0.34	16.83
Other Halstead/Zone 4	0.34	0.00	0.00	14.77	4.75	0.41	20.27
Halstead/Zone 4 Total	**0.34**	**0.65**	**0.00**	**28.96**	**6.40**	**0.74**	**37.10**
Braintree District Total	**71.21**	**13.27**	**54.51**	**34.36**	**10.76**	**19.96**	**204.07**
Chelmsford	6.63	7.97	5.39	0.17	0.26	n/a	20.43
Colchester	1.38	0.00	4.99	13.66	0.00	n/a	20.03
Sudbury	0.43	0.00	0.00	4.36	12.48	n/a	17.27
Haverhill	0.00	0.72	0.00	0.00	21.26	n/a	21.98
Tiptree	0.17	0.00	5.94	0.00	0.00	n/a	6.11
Great Dunmow	0.17	25.23	0.00	0.00	0.53	n/a	25.93
Bishop's Stortford	0.00	0.59	0.00	0.00	0.00	n/a	0.59
Other	6.11	17.58	8.40	5.58	20.73	n/a	58.41
Other Sub-Total	**14.90**	**52.09**	**24.72**	**23.78**	**55.26**	**n/a**	**170.75**
TOTAL	**86.10**	**65.35**	**79.23**	**58.15**	**66.02**		**374.82**

Source: Table 3 and 4
(Please note some figures may not total precisely due to rounding)

Table 8: Food & Beverage Goods Expenditure 2033 (£m)

Centre/Facility	Zone 1 Braintree	Zone 2 Rural West	Zone 3 Witham	Zone 4 Halstead	Zone 5 Rural North	Inflow	Total
Expenditure 2033	**94.21**	**72.34**	**86.76**	**63.67**	**71.53**		
Braintree/Zone 1/2							
Braintree Town Centre	58.51	7.67	5.47	3.88	1.86	8.60	85.98
Freeport Outlet Shopping Centre/Braintree Retail Park	12.91	1.95	6.07	0.96	1.57	10.06	33.52
Other Braintree/Zone 1/2	5.46	3.26	1.74	0.32	1.29	0.25	12.31
Braintree/Zone 1/2 Total	**76.88**	**12.88**	**13.28**	**5.16**	**4.72**	**18.90**	**131.81**
Witham/Zone 3							
Witham Town Centre	0.09	0.00	34.79	0.76	0.00	1.88	37.53
Other Witham/Zone 3	0.57	1.09	11.63	0.00	0.00	0.27	13.55
Witham/Zone 3 Total	**0.66**	**1.09**	**46.42**	**0.76**	**0.00**	**2.15**	**51.08**
Halstead/Zone 4							
Halstead Town Centre	0.00	0.72	0.00	15.54	1.79	0.37	18.42
Other Halstead/Zone 4	0.38	0.00	0.00	16.17	5.15	0.44	22.14
Halstead/Zone 4 Total	**0.38**	**0.72**	**0.00**	**31.71**	**6.94**	**0.81**	**40.56**
Braintree District Total	**77.91**	**14.68**	**59.69**	**37.63**	**11.66**	**21.86**	**223.44**
Chelmsford	7.25	8.83	5.90	0.19	0.29	n/a	22.46
Colchester	1.51	0.00	5.47	14.96	0.00	n/a	21.94
Sudbury	0.47	0.00	0.00	4.78	13.52	n/a	18.76
Haverhill	0.00	0.80	0.00	0.00	23.03	n/a	23.83
Tiptree	0.19	0.00	6.51	0.00	0.00	n/a	6.70
Great Dunmow	0.19	27.92	0.00	0.00	0.57	n/a	28.68
Bishop's Stortford	0.00	0.65	0.00	0.00	0.00	n/a	0.65
Other	6.69	19.46	9.20	6.11	22.46	n/a	63.92
Other Sub-Total	**16.30**	**57.65**	**27.07**	**26.04**	**59.87**	**n/a**	**186.93**
TOTAL	**94.21**	**72.34**	**86.76**	**63.67**	**71.53**		**410.37**

Source: Table 3 and 4

(Please note some figures may not total precisely due to rounding)

Table 9: Food and Beverage Oultets 2018

Centre	No. Class A3 Cafés/Restaurants	No. Class A4 Pubs/Bars	No. Class A5 Takeaways	Total
Braintree Town Centre	16	10	20	46
Freeport/Braintree Retail Park	16	0	0	16
Witham Town Centre	16	8	11	35
Halstead Town Centre	12	8	10	30
Braintree District Total	**60**	**26**	**41**	**127**

Source: Goad, Completely Retail, Lichfields

Table 10: Summary of Food & Beverage Goods Expenditure 2018 to 2033

Area	2018	2023	2028	2033
Available Expenditure in Braintree District (£m)				
Braintree	74.61	81.66	89.72	98.29
Freeport/Braintree Retail Park	25.50	27.89	30.62	33.52
Witham	38.80	42.45	46.63	51.08
Halstead	31.02	33.85	37.10	40.56
Total	**169.93**	**185.85**	**204.07**	**223.44**
Turnover of Existing Facilities (£m)				
Braintree	74.61	78.42	82.42	86.62
Freeport/Braintree Retail Park	25.50	26.80	28.17	29.61
Witham	38.80	40.78	42.86	45.05
Halstead	31.02	32.60	34.26	36.01
Total	**169.93**	**178.60**	**187.71**	**197.28**
Surplus/Deficit Expenditure (£m)				
Braintree	0.00	3.25	7.31	11.67
Freeport/Braintree Retail Park	0.00	1.08	2.45	3.91
Witham	0.00	1.67	3.77	6.03
Halstead	0.00	1.25	2.84	4.55
Total	**0.00**	**7.25**	**16.36**	**26.15**

Source: Tables 5 to 8
Growth in food & beverage sales efficiency of 1% per annum applied to turnover of existing facilities
(Please note some figures may not total precisely due to rounding)

Table 11: Food & Beverage Goods Floorspace Expenditure Capacity 2018 to 2033

Area	2018	2023	2028	2033
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,255	£5,523	£5,805
Floorspace Requirement (sq.m gross)				
Braintree	0	618	1,323	2,010
Freeport/Braintree Retail Park	0	206	443	674
Witham	0	317	683	1,039
Halstead	0	238	514	783
Total	**0**	**1,379**	**2,962**	**4,506**

(Please note some figures may not total precisely due to rounding)

Appendix 5: Cinema Capacity

Table 1: Study Area Population

Zone	2011	2018	2023	2028	2033
Zone 1 - Braintree	60,008	62,867	65,195	67,440	69,522
Zone 2 - Rural West	39,809	43,599	46,201	48,552	50,627
Zone 3 - Witham	54,496	57,504	59,713	61,842	63,802
Zone 4 - Halstead	39,374	41,513	43,108	44,644	46,055
Zone 5 - Rural North	48,995	49,658	50,868	52,034	53,106
Total	**242,682**	**255,141**	**265,084**	**274,512**	**283,112**

Sources: *Experian 2011 Census of Population*
ONS 2014-Based Subnational Population Projections

Table 2: Total Number of Cinema Trips (per annum)

Zone	2018	2023	2028	2033
Zone 1 - Braintree	163,455	169,506	175,344	180,757
Zone 2 - Rural West	113,356	120,122	126,236	131,631
Zone 3 - Witham	149,509	155,253	160,790	165,884
Zone 4 - Halstead	107,935	112,080	116,074	119,743
Zone 5 - Rural North	129,111	132,258	135,289	138,076
Total	**663,366**	**689,218**	**713,731**	**736,090**

Sources:
Table 1; 2.6 Trips per annum per person (Lichfields CineScope Model)

Table 3: Base Year 2018 Cinema Market Shares (%)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	% Inflow
Braintree District	98.8%	66.0%	85.1%	72.5%	9.3%	30.0%
Colchester	0.0%	0.0%	3.3%	16.5%	0.0%	n/a
Chelmsford	0.7%	12.5%	5.0%	0.0%	0.0%	n/a
Haverhill	0.0%	4.4%	0.0%	7.6%	72.2%	n/a
Bishops Stortford	0.0%	10.2%	0.0%	0.0%	0.0%	n/a
Other	0.5%	6.9%	6.6%	3.4%	18.5%	n/a
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey September 2015

Table 4: Base Year 2018 Total Cinema Trips Per Annum

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Trips 2018	**163,455**	**113,356**	**149,509**	**107,935**	**129,111**		**663,366**
Braintree District	161,493	74,815	127,233	78,253	12,007	194,486	648,287
Colchester	0	0	4,934	17,809	0	n/a	22,743
Chelmsford	1,144	14,170	7,475	0	0	n/a	22,789
Haverhill	0	4,988	0	8,203	93,218	n/a	106,409
Bishops Stortford	0	11,562	0	0	0	n/a	11,562
Other	817	7,822	9,868	3,670	23,885	n/a	46,062
Total	**163,455**	**113,356**	**149,509**	**107,935**	**129,111**		**857,852**

Source: Tables 2 and 3

(Please note some figures may not total precisely due to rounding)

Table 5: Total Cinema Trips Per Annum 2023

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Trips 2023	**169,506**	**120,122**	**155,253**	**112,080**	**132,258**		**689,218**
Braintree District	167,472	79,280	132,120	81,258	12,300	202,470	674,900
Colchester	0	0	5,123	18,493	0	n/a	23,617
Chelmsford	1,187	15,015	7,763	0	0	n/a	23,964
Haverhill	0	5,285	0	8,518	95,490	n/a	109,294
Bishops Stortford	0	12,252	0	0	0	n/a	12,252
Other	848	8,288	10,247	3,811	24,468	n/a	47,661
Total	**169,506**	**120,122**	**155,253**	**112,080**	**132,258**		**891,688**

Source: Tables 2 and 3
(Please note some figures may not total precisely due to rounding)

Table 6: Total Cinema Trips Per Annum 2028

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Trips 2028	**175,344**	**126,236**	**160,790**	**116,074**	**135,289**		**713,731**
Braintree District	173,240	83,315	136,832	84,153	12,582	210,052	700,175
Colchester	0	0	5,306	19,152	0	n/a	24,458
Chelmsford	1,227	15,779	8,039	0	0	n/a	25,046
Haverhill	0	5,554	0	8,822	97,678	n/a	112,054
Bishops Stortford	0	12,876	0	0	0	n/a	12,876
Other	877	8,710	10,612	3,947	25,028	n/a	49,174
Total	**175,344**	**126,236**	**160,790**	**116,074**	**135,289**		**923,784**

Source: Tables 2 and 3
(Please note some figures may not total precisely due to rounding)

Table 7: Total Cinema Trips Per Annum 2033

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Inflow	Total
Trips 2033	**180,757**	**131,631**	**165,884**	**119,743**	**138,076**		**736,090**
Braintree District	178,587	86,876	141,167	86,814	12,841	216,980	723,265
Colchester	0	0	5,474	19,758	0	n/a	25,232
Chelmsford	1,265	16,454	8,294	0	0	n/a	26,013
Haverhill	0	5,792	0	9,100	99,691	n/a	114,583
Bishops Stortford	0	13,426	0	0	0	n/a	13,426
Other	904	9,083	10,948	4,071	25,544	n/a	50,550
Total	**180,757**	**131,631**	**165,884**	**119,743**	**138,076**		**953,070**

Source: Tables 2 and 3

(Please note some figures may not total precisely due to rounding)

Table 8: Cinema Screen Capacity 2018 to 2033

	2018	2023	2028	2033
Total Cinema Trips attracted to Braintree District (per annum)	648,287	674,900	700,175	723,265
Number of Trips per Screen (per annum)	40,000	40,000	40,000	40,000
Cinema Screen Potential	16	17	18	18
Existing Screens in Braintree District	12	12	12	12
Braintree District Screen Capacity	4	5	6	6

Table 9: Cinema Seat Capacity 2018 to 2033

	2018	2023	2028	2033
Total Cinema Trips attracted to Braintree District (per annum)	648,287	674,900	700,175	723,265
Number of Trips per Seat (per annum)	210	210	210	210
Cinema Seat Potential	3,087	3,214	3,334	3,444
Existing Seats in Braintree District	2,100	2,100	2,100	2,100
Braintree District Seat Capacity	987	1,114	1,234	1,344

Appendix 6: Town Centre Audits

A. Braintree Town Centre

Braintree is classified as a town centre in the Publication Draft Local Plan (June 2017). It is the largest centre within Braintree District. Braintree fulfils an important role as the administrative centre of the district, supporting a range of retail, service and community facilities.

Diversity of uses

The most recent Experian Goad plan for Braintree was prepared in January 2017, and identifies that Braintree has 258 ground floor units within retail and service uses occupying 45,300 sq.m gross floorspace.

Table A.1 below illustrates the diversity of uses present in Braintree in January 2017, compared against the national average (Goad, 2017). Table A.1 also illustrates the changes between the uses present in December 2014 (from the 2015 Retail Study Update) and the latest available figures.

Table A.7 Braintree - mix of uses

<table>
<tr><th rowspan="2">Type of unit</th><th colspan="2">Number of units</th><th colspan="2">Percentage of units (%)</th><th rowspan="2">National Average (%)</th></tr>
<tr><th>2014</th><th>2017</th><th>2014</th><th>2017</th></tr>
<tr><td>Class A1 – comparison</td><td>81</td><td>90</td><td>30.1</td><td>34.9</td><td>33.4</td></tr>
<tr><td>Class A1 – convenience</td><td>15</td><td>14</td><td>5.6</td><td>5.4</td><td>10.4</td></tr>
<tr><td>Class A1 – service</td><td rowspan="5">148</td><td>43</td><td rowspan="5">55.0</td><td>16.7</td><td>13.0</td></tr>
<tr><td>Class A2 – financial and prof. services</td><td>43</td><td>16.7</td><td>11.8</td></tr>
<tr><td>Class A3 – restaurants/ cafés</td><td>16</td><td>6.2</td><td>9.5</td></tr>
<tr><td>Class A4 – pubs/bars</td><td>10</td><td>3.9</td><td>4.6</td></tr>
<tr><td>Class A5 – takeaway</td><td>20</td><td>7.7</td><td>6.0</td></tr>
<tr><td>Vacant (Class A1-A5)</td><td>25</td><td>22</td><td>9.3</td><td>8.5</td><td>11.2</td></tr>
<tr><td>Total</td><td>269</td><td>258</td><td>100.0</td><td>100.0</td><td>100.0</td></tr>
</table>

Source: Experian Goad for Braintree (January 2017) and Experian Goad 2017 national average

There has been a slight reduction in the number of units since the 2015 Retail Study Update, but a small increase in the overall amount of floorspace (from 45,440 to 45,300 sq.m gross). The number of convenience goods retail outlets remains similar, while the number of comparison goods retail has increased. The number of non-retail services uses has decreased, and the proportion of restaurants and pubs are below the national average. The vacancy rate has reduced and is below the national average.

Retailer representation

Braintree has a reasonable selection of comparison shops (90 units) reflecting its size and role in the shopping hierarchy in the District. Table A.2 provides a breakdown of comparison shop units by category compared with the national average.

The centre provides all of the Goad comparison shop categories apart from car, motorcycle accessories. The town centre has a good choice of shops in most categories. However the proportion of clothing shops is relatively low, whilst the proportion of chemists/opticians and toys/hobby shops is relatively high.

Table A.8 Braintree breakdown of comparison units

Type of unit	Number of units	Percentage of units (%)	National average (%)
Clothing and footwear	12	13.3	24.5
Furniture, carpets and textiles	7	7.8	7.7
Booksellers, arts, crafts and stationers	8	8.9	5.0
Electrical, gas, music and photography	10	11.1	9.6
DIY, hardware and homeware	6	6.7	7.1
China, glass, gifts and fancy goods	4	4.4	7.5
Cars, motorcycles and motor accessories	0	0.0	0.5
Chemists, drug stores and opticians	12	13.3	10.9
Variety, department and catalogue	3	3.3	1.7
Florists, nurserymen and seedsmen	2	2.2	2.1
Toys, hobby, cycle and sports	9	10.0	5.5
Jewellers	4	4.4	5.2
Charity and second hand shops	11	12.2	9.6
Other comparison retailers	2	2.2	3.1
Total	**90**	**100.0**	**100.0**

Source: Experian Goad for Braintree (January 2017) and Experian Goad 2017 national average

Braintree continues to have a good range of national multiples represented. The town centre is anchored by three large food stores ie. Sainsbury's, Tesco and Iceland plus the B&M Bargains store, replacing the former Morrisons.

Co-op's department store is the largest comparison store and other major comparison retailers include Argos, Boots, Dorothy Perkins, New Look, Peacocks, Superdrug and WHSmith.

Service uses

The centre has a good range of non-retail service uses, with all categories well represented (see Table A.3). The mix of service uses is similar to the national average, although the centre has a lower proportion of restaurants/cafés and higher proportions of estate agents/valuers and hairdressers/beauty parlours.

The wide range and choice of services in Braintree reflects its dual shopping and day to day service role.

Table A.3 Braintree analysis of service uses

Type of unit	Number of units	Percentage of units (%)	National average (%)
Restaurants/Cafés	16	12.8	24.4
Fast food/takeaways	20	16.0	15.5
Pubs/bars	10	8.0	7.2
Banks/other financial services	15	12.0	11.5
Betting shops/casinos	4	3.2	3.9
Estate agents/valuers	18	14.4	9.7
Travel agents	3	2.4	2.3
Hairdressers/beauty parlours	36	28.8	23.4
Laundrettes/dry cleaners	3	2.4	2.1
Total	**125**	**100.0**	**100.0**

Source: Experian Goad for Braintree (January 2017) and Experian Goad 2017 national average

Vacancies

Table A.1 indicates that the number of vacant units has fallen between 2014 and 2017. However, the amount of vacant floorspace has increased from 2,480 sq.m gross in 2014 to 2,830 sq. gross in 2017. Vacant units are generally dispersed throughout the centre, but there remains a small concentration in southern part of High Street, but this has improved slightly. The vacancy rate across the centre remains below the national average (8.5% compared with 11.2%).

Shopper views

Respondents to the in-centre survey undertaken by NEMS in October 2015 were asked what they like/dislike about Braintree and what would make them shop more often in the town centre.

Almost 62% of respondents answered that they like Braintree because it is easily accessible from their home and 11% thought it had good shops.

39% of respondents stated that they dislike 'nothing/very little' about Braintree, while a further 10% stated that there is a poor range of non-food retailers. When asked what changes they would suggest to improve Braintree town centre 27% said 'more shops/better choice of stores' and 11% wanted to see more large retailers.

Summary

The updated health check of Braintree Town Centre indicates that the centre is continuing to perform reasonably well at its level in the retail hierarchy, when considered against the indicators of vitality and viability. The vacancy rate has remained improved between 2014 and 2017.

The centre continues to be anchored by the main food stores of Sainsbury's and Tesco, plus the B&M Bargains store, which dominate convenience goods provision in the town centre. The number of comparison goods units has increased since 2014 and the representation of multiple comparison goods remains relatively strong. The number of service uses has also increased, but the proportion of restaurants/cafés remains noticeably below national average.

Overall the centre continues to provide a pleasant shopping environment and good levels of pedestrian flow and connectivity throughout the centre.

B. Witham Town Centre

Witham is classified as a town centre in the Publication Draft Local Plan (June 2017). It is located to the south east of the district and primarily serves the Witham urban area and surrounding rural settlements including Silver End, Wickham Bishops and Rivenhall.

Diversity of uses

The most recent Experian Goad plan for Witham was prepared in March 2017, and identifies that Witham has 152 ground floor units within retail and service uses occupying 28,850 sq.m gross floorspace.

Table B.1 below illustrates the diversity of uses present in Witham in March 2017, compared against the national average (Goad, 2017). Table B.1 also illustrates the changes between the uses present in March 2015 (from the 2015 Retail Study Update) and the latest available figures.

Table B.1 Witham - mix of uses

<table>
<tr><th rowspan="2">Type of unit</th><th colspan="2">Number of units</th><th colspan="2">Percentage of units (%)</th><th rowspan="2">National average (%)</th></tr>
<tr><th>2015</th><th>2017</th><th>2015</th><th>2017</th></tr>
<tr><td>Class A1 – comparison</td><td>42</td><td>49</td><td>6.2</td><td>32.2</td><td>33.4</td></tr>
<tr><td>Class A1 – convenience</td><td>10</td><td>10</td><td>26.1</td><td>6.6</td><td>10.4</td></tr>
<tr><td>Class A1 – service</td><td rowspan="5">92</td><td>15</td><td rowspan="5">57.1</td><td>9.9</td><td>13.0</td></tr>
<tr><td>Class A2 – financial and prof. services</td><td>29</td><td>19.1</td><td>11.8</td></tr>
<tr><td>Class A3 – restaurants/ cafés</td><td>16</td><td>10.5</td><td>9.5</td></tr>
<tr><td>Class A4 – pubs/bars</td><td>8</td><td>5.3</td><td>4.6</td></tr>
<tr><td>Class A5 – takeaway</td><td>11</td><td>7.2</td><td>6.0</td></tr>
<tr><td>Vacant (Class A1-A5)</td><td>17</td><td>14</td><td>10.6</td><td>9.2</td><td>11.2</td></tr>
<tr><td>Total</td><td>161</td><td>152</td><td>100.0</td><td>100.0</td><td>100.0</td></tr>
</table>

Source: Experian Goad for Witham (March 2017) and Experian Goad 2017 national average

The number of units and amount of floorspace within Witham has decreased between 2015 and 2017. However the number of comparison goods retail uses increased, whilst the number of non-retail services uses decreased, although the proportion of most service uses is higher than the national average. The vacancy rate has decreased and is below the national average.

The number of convenience goods retailer units is unchanged. The centre is still anchored by a medium sized Tesco food store. Other convenience uses in the centre are include an Iceland store, bakers, butchers, newsagents and a health food shop.

The proportion of comparison goods units in the centre is now similar to the national average, and has increased since March 2015.

Witham has a reasonable selection of comparison shops (49) reflecting its size and role in the shopping hierarchy in the District. Table B.2 provides a breakdown of comparison shop units by category compared with the national average.

The centre has representation in provides all of the Goad comparison shop categories apart from variety stores and toys/hobby/cycles/sport. However the choice of shops in most categories is limited. The proportion of chemists/opticians, booksellers/stationers and charity shops is relatively high.

Table B.2 Witham breakdown of comparison units

Type of unit	Number of units	Percentage of units (%)	National average (%)
Clothing and footwear	11	22.4	24.5
Furniture, carpets and textiles	1	2.0	7.7
Booksellers, arts, crafts and stationers	5	10.2	5.0
Electrical, gas, music and photography	2	4.1	9.6
DIY, hardware and homeware	6	12.2	7.1
China, glass, gifts and fancy goods	1	2.0	7.5
Cars, motorcycles and motor accessories	1	2.0	0.5
Chemists, drug stores and opticians	8	16.3	10.9
Variety, department and catalogue	0	0.0	1.7
Florists, nurserymen and seedsmen	2	4.1	2.1
Toys, hobby, cycle and sports	0	0.0	5.5
Jewellers	2	4.1	5.2
Charity and second hand shops	8	16.3	9.6
Other comparison retailers	2	4.1	3.1
Total	**49**	**100.0**	**100.0**

Source: Experian Goad for Witham (March 2017) and Experian Goad 2017 national average

Witham continues to have a reasonable selection of national multiples represented, including Clarks, New Look, Select, M&Co, Peacocks, The Works, Card Factory, Boots, Lloyds Pharmacy and Superdrug. The continued presence of these multiples in the centre is a positive indicator of the performance of Witham Town Centre in its role in the retail hierarchy.

Service uses

The centre has a good range of non-retail service uses, with all categories well represented (see Table B.3). The mix of service uses is similar to the national average, although the centre has a lower proportion of hairdressers/beauty parlours and higher proportions of estate agents/ valuers and betting shops.

Table B.3 Witham analysis of service uses

Type of unit	Number of units	Percentage of units (%)	National average (%)
Restaurants/Cafés	16	22.5	24.4
Fast food/takeaways	11	15.5	15.5
Pubs/bars	8	11.3	7.2
Banks/other financial services	8	11.3	11.5
Betting shops/casinos	5	7.0	3.9
Estate agents/valuers	9	12.7	9.7
Travel agents	3	4.2	2.3
Hairdressers/beauty parlours	10	14.1	23.4
Laundrettes/dry cleaners	1	1.4	2.1
Total	**71**	**100.0**	**100.0**

Source: Experian Goad for Witham (March 2017) and Experian Goad 2017 national average

Vacancies

Table B.1 indicates that the number of vacant units has reduced by three between 2015 and 2017, and the vacancy rate remains below the national average. The amount of vacant floorspace has also decreased marginally from 2,420 sq.m in 2015 to 2,370 sq.m in 2017. Vacant units are reasonably dispersed around the centre, including three within the Newlands Shopping Centre and two large units on Newland Street either side of Kings Chase.

Shopper views

Respondents to the In-centre survey undertaken by NEMS in October 2015 were asked what they like/dislike about Witham and what would make them shop more often in the town centre.

Almost 40% of respondents answered that they like Witham because it is easily accessible from their home, while 10% thought it was clean/well maintained and a further 10% thought it was an attractive environment/nice place.

42% of respondents stated that they dislike 'nothing/very little' about Witham, while a further 19% stated particular shops/services are missing. When asked what changes they would suggest to improve Witham town centre 26% said 'an improved range of independent/specialist shops' and 16% wanted to see more large retailers.

Summary

Witham appears to be performing satisfactorily against the health check indicators of vitality and viability. The centre continues to be anchored by the Tesco food store in the Grove Centre, and there have been limited changes in the national multiples represented in the centre.

The proportion of comparison goods units has increased, and the centre offers a good range of service uses.

As identified in the previous study, the Newlands Shopping Centre continues to detract from the overall appearance of the centre and has been identified as a development opportunity which could enhance the shopping centre.

C. Halstead Town Centre

Halstead is also classified as a town centre in the Publication Draft Local Plan (June 2017). It is located to the north east of Braintree and serves the Halstead urban area and surrounding villages/rural settlements including Earls Colne.

Diversity of uses

The most recent Goad plan for Halstead was prepared in August 2015, and identifies that Halstead has 144 ground floor units within retail and service uses occupying 23,150 sq.m gross floorspace.

Table C.1 below illustrates the diversity of uses present in Halstead in August 2015, compared against the national average (Goad, 2017). Table C.1 also illustrates the changes between the uses present at the time of the 2015 Retail Study Update and the latest available figures.

Table C.1 Halstead - mix of uses

<table>
<tr><th rowspan="2">Type of unit</th><th colspan="2">Number of units</th><th colspan="2">Percentage of units (%)</th><th rowspan="2">National Average (%)</th></tr>
<tr><th>2015</th><th>2015 updated</th><th>2015</th><th>2015 updated</th></tr>
<tr><td>Class A1 – comparison</td><td>47</td><td>42</td><td>32.2</td><td>29.2</td><td>33.4</td></tr>
<tr><td>Class A1 – convenience</td><td>8</td><td>9</td><td>5.5</td><td>6.3</td><td>10.4</td></tr>
<tr><td>Class A1 – service</td><td rowspan="5">74</td><td>25</td><td rowspan="5">50.7</td><td>17.4</td><td>13.0</td></tr>
<tr><td>Class A2 – financial and prof. services</td><td>19</td><td>13.2</td><td>11.8</td></tr>
<tr><td>Class A3 – restaurants/ cafés</td><td>12</td><td>8.3</td><td>9.5</td></tr>
<tr><td>Class A4 – pubs/bars</td><td>8</td><td>5.6</td><td>4.6</td></tr>
<tr><td>Class A5 – takeaway</td><td>10</td><td>6.9</td><td>6.0</td></tr>
<tr><td>Vacant (Class A1-A5)</td><td>17</td><td>19</td><td>11.6</td><td>13.2</td><td>11.2</td></tr>
<tr><td>Total</td><td>146</td><td>144</td><td>100.0</td><td>100.0</td><td>100.0</td></tr>
</table>

Source: Experian Goad for Halstead (August 2015) and Experian Goad 2017 national average

The number of units and amount of floorspace remained broadly unchanged. However the number of comparison and convenience goods retail uses have decreased, whilst the number of non-retail services uses and vacant units have increased. The proportion of service uses is higher than the national average. The number of vacant units has also increased, and the vacancy rate is higher than the national average.

The centre is anchored by Co-op and Sainsbury's food stores. Other convenience uses in the centre include bakers, butchers and newsagents. The Goad data pre-dates the opening of the new Lidl store on the former EMD site, which also adds to the convenience offer of the town centre.

Halstead has a reasonable selection of comparison shops (42) reflecting its size and role in the shopping hierarchy in the District. Table C.3 provides a breakdown of comparison shop units by category compared with the national average.

The centre has representation in all of the Goad comparison shop categories however the choice of shops in most categories is limited (4 shops or less). The proportion of charity shops is relatively high.

Halstead has retained its small selection of national multiples represented, including Boots, Clinton Cards, Dorothy Perkins and WH Smith's.

Table C.2 Halstead breakdown of comparison units

Type of unit	Number of units	Percentage of units (%)	National average (%)
Clothing and footwear	6	14.3	24.5
Furniture, carpets and textiles	6	14.3	7.7
Booksellers, arts, crafts and stationers	5	11.9	5.0
Electrical, gas, music and photography	1	2.4	9.6
DIY, hardware and homeware	4	9.5	7.1
China, glass, gifts and fancy goods	1	2.4	7.5
Cars, motorcycles and motor accessories	1	2.4	0.5
Chemists, drug stores and opticians	3	7.1	10.9
Variety, department and catalogue	1	2.4	1.7
Florists, nurserymen and seedsmen	2	4.8	2.1
Toys, hobby, cycle and sports	3	7.1	5.5
Jewellers	1	2.4	5.2
Charity and second hand shops	7	14.6	9.6
Other comparison retailers	1	2.4	3.1
Total	**42**	**100.0**	**100.0**

Source: Experian Goad for Halstead (August 2015) and Experian Goad 2017 national average

Service uses

The centre has a good range of non-retail service uses, with all categories well represented (see Table C.3). The mix of service uses is similar to the national average, although the centre has a lower proportion of restaurants/cafés and higher proportions of estate agents/valuers and pubs/bars.

Table C.3 Halstead analysis of service uses

Type of unit	Number of units	Percentage of units (%)	National average (%)
Restaurants/Cafés	12	16.7	24.4
Fast food/takeaways	10	13.9	15.5
Pubs/bars	8	11.1	7.2
Banks/other financial services	7	9.7	11.5
Betting shops/casinos	3	4.2	3.9
Estate agents/valuers	8	11.1	9.7
Travel agents	1	1.4	2.3
Hairdressers/beauty parlours	20	27.8	23.4
Laundrettes/dry cleaners	3	4.2	2.1
Total	**72**	**100.0**	**100.0**

Source: Experian Goad for Halstead (August 2015) and Experian Goad 2017 national average

Vacancies

As shown in Table C.1, vacancies in Halstead Town Centre have increased by two units since the 2015 Update, resulting in a centre vacancy rate of just over 13%. The vacant units are dispersed throughout the centre they are not considered to significantly detract from the overall vitality and viability of the centre.

Shopper views

Respondents to the In-centre survey undertaken by NEMs in October 2015 were asked what they like/dislike about Halstead and what would make them shop more often in the town centre.

Almost 40% of respondents answered that they like Witham because it is easily accessible from their home, while 12% thought it an attractive environment/nice place.

26% of respondents stated that they dislike 'nothing/very little' about Halstead, while a further 23% stated there is a poor range of non-food retailers. When asked what changes they would suggest to improve Halstead town centre 29% wanted to see more stores/better choice of stores and 24% wanted to see an improved range of independent/specialist shops.

Summary

Halstead continues to perform satisfactorily as a small market town in meeting the day to day shopping needs of the residents in the town and surrounding rural hinterland. The main convenience uses in the centre - Sainsbury's and Co-op stores - continue to be well used and anchor the centre and the new Lidl store adds to the convenience offer of the centre.

The number of vacant units has increased since the last study, and the vacancy rate for the centre has increased to around 13%, which is above the national average.

Bristol
0117 403 1980
bristol@lichfields.uk

Cardiff
029 2043 5880
cardiff@lichfields.uk

Edinburgh
0131 285 0670
edinburgh@lichfields.uk

Leeds
0113 397 1397
leeds@lichfields.uk

London
020 7837 4477
london@lichfields.uk

Manchester
0161 837 6130
manchester@lichfields.uk

Newcastle
0191 261 5685
newcastle@lichfields.uk

Thames Valley
0118 334 1920
thamesvalley@lichfields.uk