

**BRAINTREE DISTRICT COUNCIL  
LOCAL PLAN REVIEW:**

**BRAINTREE RETAIL STUDY**

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## **EXECUTIVE SUMMARY**

### **Introduction**

1. Braintree District Council has commissioned Healey & Baker to undertake a retail study to inform the shopping chapter of the Local Plan Review.
2. The District Council is seeking to understand the trading patterns and characteristics of three main town centres of the district – Braintree, Halstead and Whitham – and the potential for these centres to accommodate future growth.
3. Healey & Baker has been involved in various aspects of retail planning and development in and around Braintree for many years and is well experienced on retailing and town centre issues generally.

### **Economic Context**

4. From an analysis of national retail patterns, we consider there are likely to be a number of future trends:-
  - ◆ Retail concentration representing the shift of trading from secondary pitch to primary and from independent to multiple retailer;
  - ◆ Polarisation with stronger trading performance by regional centres with a full comparison offer either in large town or city centres or in off-centre locations at the expense of smaller centres;
  - ◆ Consumer preferences primarily in respect of the growing importance of the “leisure shop” undertaken at centres offering an attractive environment and a wide comparison/durable offer, combined with the increasing attraction of readily accessible centres with ample in-expensive and secure parking and the attraction of

sufficient critical mass of stores open and trading on Sunday combined with a wide variety of leisure and tourism facilities; and

- ◆ The hardening of planning policy to refuse out-of-centre development proposals and concentrate all forms of development particularly retail and leisure development in town centres where advantage can be taken of public transport accessibility and furthering the aims of sustainability.

### **Regional Context**

5. The catchment areas associated with the principal town centres within the Borough are restricted due, in the south, to the presence of Colchester and Chelmsford, relative to Braintree and Whitham and in the north by Sudbury, relative to Halstead. The trading performance of Whitham and Halstead is also affected by the presence of Braintree.

### **Policy Context**

6. At a national and regional planning policy level, there is significant encouragement for travel intensive uses to locate within town centres. In particular, the sequential approach to site identification is outlined with a first preference being for town centres, followed by edge-of-centres and only then out of centre sites.
7. The importance of creating and monitoring a town centre strategy is emphasised in PPG6 and the importance of the diversity of uses within town centres and their accessibility to people living and working in the area are emphasised as being important to the contribution they make to vitality and viability.
8. Current structure plan and local plan policy also seeks to emphasise the role of town centres in meeting the needs of communities.

**Braintree**

9. Braintree has seen much activity over the past ten years in terms of both convenience and comparison retailing in the town centre and elsewhere, principally at Chapel Hill. The George Yard scheme significantly strengthened the town centre whilst planning permissions for retail warehousing and factory outlet centre shopping at Chapel Hill has brought a different retail emphasis to the town.
10. Consequently, it has been identified that whilst previously there was a significant outflow of trade for comparison retailing goods to centres such as Colchester and Chelmsford, it is apparent that the Freeport Village has clawed back much of this trade.
11. It is considered that only limited scope exists to enhance comparison retailing within Braintree over the plan period. In terms of convenience (food) retailing, it is considered that Braintree is currently very well provided for with no real future scope. Concern is expressed about the potential of the Tesco at Marks Farm to draw trade from the town centre.
12. The future opportunity for Braintree is to draw together its various retail formats to ensure that they are complementary and to do this a co-ordinated strategy will be required, potentially with the help of a town centre manager.

**Witham**

13. The proximity of Colchester and Chelmsford to Witham has the effect of limiting its influence. This is noted in relation to the level of trade that the centre secures within its principal postal sectors, relative to centres elsewhere.

14. Limited scope is identified for convenience or comparison retailing within the centre, based not just on expenditure figures but also in relation to retailer interest and likely developer inactivity.
15. Opportunities for improving the food retailing associated with the centre do exist, particularly in relation to a discount operation in the Newlands Centre.
16. Witham needs to consolidate its existing retailing within the centre to maintain its current role and function.

### **Halstead**

17. Halstead town centre competes against Braintree and Sudbury to attract residents from these overlapping catchment areas. These competitors are higher order centres, which have experienced town centre development in recent years.
18. The opportunity for new development in Halstead town centre is more restricted by its conservation area status and the large number of historic buildings which exist there, together with the topography of the centre. The future role of the town centre will need to reflect these intrinsic qualities, rather than seeking to compete direct with larger centres elsewhere.
19. Limited retailer demand has been identified for the centre and developer activity is unlikely, unless associated with a purpose built facility such as a small foodstore. The opportunity does exist to enhance food retailing of the centre, potentially with a foodstore with its own car parking, to help support the town centre.
20. The centre requires a co-ordinated strategy, with all those who have an interest in the centre working together to provide a realistic strategy for the future.

21. Such a strategy should be predicated on maintaining the current role and function of the centre.

## **1.0 INTRODUCTION**

### **Background**

- 1.1 Braintree District Council's adopted Local Plan provides a strategy and framework for land-use and development in the period to 2001. The Council has embarked on a review of its Local Plan to provide a framework for the next plan period to 2011. The Council must ensure this guidance is both up-to-date and relevant by fully taking into account changes in national, regional and strategic guidance and pressures and influences being exerted on the District by all sectors of the community.
- 1.2 To assist in this process, Braintree District Council commissioned Healey & Baker to undertake a retail study to inform the Shopping Chapter of the Local Plan Review.

### **The Brief**

- 1.3 The District Council is seeking to understand from Healey & Baker the trading patterns and characteristics of the three main town centres of the District, namely Braintree, Halstead and Witham, their place within the wider retail hierarchy of the region, and the potential for these centres to accommodate future growth. It is anticipated that this will provide greater clarity of the needs of these centres, in terms of the quantitative capacity, demand, operator requirement and development market perceptions, sufficient to assess how these needs should be met in the emerging Local Plan.

- 1.4 To discharge the Consultant's Brief the following matters need to be addressed:
- a) The vitality and viability of each of the town centres with specific reference to the indicators set out in PPG6, June 1996;
  - b) The need and capacity for further comparison and convenience retail floorspace having regard to the appropriate catchment for each centre;
  - c) The strengths, weaknesses, opportunities and threats associated with each centre; and
  - d) The recommended strategy for each centre for the plan period to 2011.
- 1.5 The result of the study should give certainty to those investing and locating within the district, and provide the justification for considering a policy background sufficiently robust to withstand detailed questioning from parties pursuing individual interests as the review of the local plan progresses.

### **Scope of Report**

- 1.6 With the desired outputs of the study in mind, the scope and structure of this report is as follows.
- 1.7 **Section 2** seeks to provide a commentary on how the UK retail market has changed over time, existing consumer demands and preferences, anticipated trends, and the local economy in order to provide a context in which to understand the dynamics of the industry and the influences being exerted on Braintree, Halstead and Witham and how this has helped shape and will continue to shape their future role and function.

- 1.8 **Section 3** provides a regional context for the study, to consider the retail hierarchy of the region, other centres including Colchester, Chelmsford and Freeport Leisure Outlet Village and the general characteristics of the population which lie within the defined catchments for the study.
- 1.9 **Section 4** provides an overview of the key provisions in national planning policy guidance, regional, strategic and local plan policies which will provide the context for framing any recommendations on the appropriate policy approach for the respective town centres.
- 1.10 **Sections 5, 6 and 7** consider each town in turn in terms of:
- a) PPG6 performance indicators including diversity of use, structure of town centre, changes in retailer representation, trends in retail performance and perceptions of the town centre;
  - b) A comparison and convenience retail capacity exercise;
  - c) An assessment of the strengths, weaknesses, opportunities and threats associated with the town centre;
  - d) An assessment of comparable centres; and
  - e) A recommended strategy for the town centre grounded in an analysis of the outputs of the individual assessments identified above.
- 1.11 **Section 8** draws together the report and provides a summary and conclusion for the District for retailing in the plan period to 2011.

### **Healey & Baker**

- 1.12 Healey & Baker has been involved in various aspects of retail development and planning consultancy in and around Braintree for many years and is well placed to advise the Council. In the 1980's Healey & Baker advised the Council in relation

to the development of the George Yard Shopping Centre particularly in relation to its feasibility, development, letting and retail planning issues. This resulted in Healey & Baker presenting evidence in 1985 at a Public Inquiry in support of a Compulsory Purchase Order. Since its development, Healey & Baker has acted as letting agent for the shopping centre.

- 1.13 In 1992 Healey & Baker prepared a retail study for the Council to assist in determining retail policy for the current adopted Local Plan which resulted in appearances at the Local Plan Inquiry on behalf of the Council. This study was updated in 1995 to take account of changes in retail planning policy at a national level and subsequent planning permissions issued within Braintree's catchment area.
- 1.14 Healey & Baker has appeared on several occasions on behalf of the Council in relation to foodstore inquiries in the Braintree area.
- 1.15 Since 1995 Healey & Baker has advised and continues to advise the Council on the development of the Freeport Factory Outlet Village and associated development at Chapel Hill and applications received by the Council for additional retail foodstores.
- 1.16 As a consequence, the Firm has been in a position to witness the changing patterns of retailing in the District of the past 10-15 years. The advice in this report has regard to this historic context.

## **2.0 ECONOMIC CONTEXT**

2.1 This section is included in the report to provide a context to understand some of the changes that have taken place and are likely to take place in Braintree, Halstead and Witham which result from changes in national trends. At this stage the analysis is purely factual. In the individual town centre sections that follow, these national economic changes are applied to the town centres to explain in part how these have changed over time and what can be expected in the future.

### **The UK Retail Market**

2.2 During the mid to late 1980s the retail market in the UK experienced a phenomenal growth generated by strong consumer demand against a backdrop of restricted supply. In the 6 months to 1986 retail rental growth on a national basis improved by approximately 6% showing a year growth of over 13%.

2.3 Retail sales volume for December 1986 was up 7.2% on December 1985 with strong increased spending on consumer durables and evidence of strong aggressive demand from the few available 100% prime pitch units that resulted in much unsatisfied demand beginning to spill over into good secondary locations. By December 1986, UK shop rents averaged approximately 152% of the 1981 base.

2.4 By 1990, the recession had become evident and strong demand for space evaporated. Many new shopping centres were forced to open with only half the shops let. Other projects on the 'drawing board' had to be shelved. Indeed, in 1990 it was Healey & Baker's view that the retail letting market was more difficult than at any time since the early 1970's.

- 2.5 Uncertainty in the job market, a falling consumer expenditure and a reluctance by consumers generally to resume spending had a severe effect on the retail property market. This resulted in over supply, a lack of demand, declining rents as a consequence, and a reduction in investment and development activity.
- 2.6 The net result of this climate was to bring several hundred town centre shops onto the market, particularly in secondary and tertiary locations together with the contraction of recognised prime pitch. During this period, many niche retailers and well known national multiple retailers ceased trading.
- 2.7 At the beginning of the 1990s, despite reductions in inflation and interest rates and rising disposable incomes, these gains were not translated into higher spending. Retail sales in 1991 fell by 0.4% over the year and consumer credit fell from £3.05 billion in 1990 to £0.37 billion in 1991. During the same period the savings ratio increased to 10.5%, 1.5% greater than the 1990 level.
- 2.8 Despite the fact that yield levels began to stabilise towards the end of 1991 the beneficial impact on capital values was offset by the overall fall in rental levels witnessed in all markets over the period.
- 2.9 This concern over falling rents and the value of incentive packages required to secure anchor stores and major tenants materially affected the investment market with prime yields across retail weakening during this period. It emerged that investment institutions were becoming increasingly selective in their property investment decisions with keen interest being maintained for prime, securely let properties resulting in competitive bidding for the limited supply of good quality stock being offered on the market at the time.
- 2.10 Prime yields in the retail market stabilised by March 1992, hardening approximately 0.5% on the 1990 figures.

- 2.11 A number of property companies were severely effected by the recession with many going into receivership. Bucking the trend, demand for out of town retail warehouses remained strong with a resultant growth in UK rents averaging approximately 7.1% between 1990 and 1991.
- 2.12 The foodstore market continued to perform well during the recession with demand remaining strong particularly for off centre, accessible locations close to the very best towns where the possibility of monopoly or near monopoly existed. With increasing competition in this sector, interest started to be shown in locations either involving overlapping with the catchment of other stores or not fully meeting ideal store formats. Evidence suggested that a two tier market was emerging. Retailers would pay large sums to retain monopoly positions but were interested in more marginal sites only at discounted prices.
- 2.13 In town centres, the banking and financial sector began to pursue aggressively a programme of unit expansion, targetting prime shopping areas, and having the financial muscle to secure these locations at premium rental levels.
- 2.14 Since the mid 1990s retail property in the UK has witnessed the highest levels of rental growth amongst all property sectors. Retail warehousing has continued to indicate growth in the region of 7% along with foodstores and High Street retailers who have seen significant growth between 4.5 and 5% per annum (source: IPD).
- 2.15 Reflecting the increasing strength in the retail sector, investor confidence in retail has improved generally, with retail yields hardening throughout the UK particularly in relation to prime High Street retailers. Average UK prime High Street retail yields are approximately 6.5% (source: IPD) a 1 or 2% improvement on those witnessed during the depth of the recession.

- 2.16 Rental growth has seen a modest improvement in most centres during this period with rents increasing in all key regions although there are significant variations in growth as a result of localised factors.
- 2.17 Irrespective of global economic factors, the retail market is increasingly witnessing the polarisation and contraction of retailing with growing competition for the strongest centres and prime locations. Demand for smaller centres and tertiary and poorer secondary areas within centres being adversely effected.
- 2.18 Although retail sales remained relatively flat during 1995, there has been a gradual improvement over the last 4-5 years with many multiple retailers performing relatively well, taking advantage of their greater buying power, economies of scale and their ability to pay higher premiums and rents than smaller local operators. Many independent retailers have continued to lose market share and evidence suggests that multiples are becoming even more dominant in the retail market. As a consequence, impact on the secondary and tertiary market has continued although with incentives and with an under supply of prime stock, there is also evidence of an emerging two tier secondary pitch as multiple retailers seeking to secure space cannot satisfy store requirements in prime locations.
- 2.19 This has resulted in the emergence of retailers seeking large space units in prime locations, which are rarely available. As a result, letting activity has remained relatively muted but where appropriate units have become available, the combination of limited supply and strong demand has often led to marked increases in rents achieved. Since retail demand is principally focused on large units in prime areas, many locations have seen the evolution of a two tier market, even in relation to adjacent shopping streets. This situation has been exacerbated in towns not benefiting from new development where the availability of prime stock is restricted.

## **Consumer Demand and Preference**

- 2.20 Fundamentally, the use of cars for shopping continues to grow irrespective of moves by Government to resist this. There is currently almost 3 million sq.m of prime retail floorspace in off centre locations enjoying an estimated third of all retail sales (source: Verdict). This off centre provision is seen as a direct response to community demand for such facilities as well as reflecting difficulties experienced by operators in securing suitable premises within town and city centres and the economies of scale and improved margins for operators. A substantial proportion of all shopping trips effectively use the car boot as a shopping basket.
- 2.21 From various consumer surveys undertaken it is apparent that there is increasing concern by the shopping public for quality of urban environments, comfort, convenience and the security of the shopping street. Surveys also reveal that notwithstanding a very significant consumer preference for small and unique shops run by local traders, returns overwhelmingly confirm that people primarily spend their money in national multiple shops.
- 2.22 One of the most significant influences in the retail market in recent years has been the wide scale introduction of Sunday trading. Although Sunday trading is not new to the UK economy it has largely been confined to foodstores and bulky goods retailers mainly in off centre locations. Legislation passed in 1993 has effectively enabled High Streets to open for Sunday trading.
- 2.23 What has emerged is that Sunday trading has become particularly popular at large free-standing shopping centres such as Lakeside and Bluewater as well as those traditional centres fulfilling a major national or regional shopping centre function.

- 2.24 There is no doubt that Sunday shopping is popular with the shopping public with evidence to suggest that family shopping expeditions by groups of people who are not otherwise able to shop together are increasing. What is emerging is a picture that shoppers are increasingly using their leisure time in order to shop and it is those stores particularly targeting the leisure markets such as fashion and footwear, book sellers, stationery and music/record shops that are benefiting specifically from the relaxation of Sunday trading laws.
- 2.25 What is evident is that weekly shopping patterns have changed with retailers witnessing a diversion of trade from other days of the week to a Sunday. Traders in secondary and tertiary locations in established town centres are finding it increasingly difficult to compete as a result of insufficient numbers to open on Sunday to ensure that the centre remains competitive on this increasingly important trading day.
- 2.26 The increase in leisure trip expenditure has benefited those centres with attractive and/or historic environments which also provide a range of additional leisure attractions as a 'day out experience'. A further trend of increasing importance, is the ageing profile of the shopping public. The 'greying' consumer is likely to lead to the prospects of departments stores and retailers providing a mix and wide range of goods securing an increase in share of the market.
- 2.27 Growth in shopping over the internet is also a discernible pattern. The significant increase in access to the internet combined with the rapid growth in the number of operators using this medium has proved attractive to many shoppers. The considerable set-up costs, variable delivery patterns and sceptical stock market conditions have militated against rapid growth at this stage. Nonetheless certain products such as books, CD's and some electricals are proving to be well suited to internet shopping.

### **Anticipated Trends**

2.28 Reference has been made to a number of economic and consumer trends with the resultant effect on the retail market. This will continue to effect retailer operations and occupational policies. The principal factors are likely to lead to the following changes:

- (a) Retail concentration representing the shift of trading from secondary pitch to primary and from independent to multiple retailer;
- (b) Polarisation with stronger trading performance by regional centres with a full comparison offer either in city centres or in off centre locations at the expense of smaller centres;
- (c) Consumer preferences primarily in respect of the growing importance of the 'leisure shop' undertaken at centres offering an attractive environment and a wide comparison/durable offer, combined with the increasing attraction of readily accessible centres with ample in-expensive and secure parking and the attraction of sufficient critical mass of stores open and trading on Sunday combined with a wide range of leisure and tourism facilities; and
- (d) The hardening of planning policy to refuse out of centre development proposals and concentrate all forms of developments particularly retail and leisure developments in town centres where advantage can be taken of public transport accessibility furthering the aims of sustainability.

2.29 These trends lead us to anticipate that there will be a common pattern of impact on all centres including: the dominance of prime pitch leading to higher vacancies in secondary and tertiary areas; the decline of independent traders and increasing dominance by national multiple traders; and an increasing distinction between comparison and convenience shopping destinations.

- 2.30 As a result, the larger centres will continue to out perform smaller centres with those of middle ranking status having the potential to significantly lose trade. Attractive and historic centres will perform better than centres with unpleasant shopping environments. Centres benefiting from major shopping centre development where this is viable will enjoy a significant status uplift and conversely those without improvements will continue to lose status.

### **3.0 REGIONAL CONTEXT**

#### **Retail Hierarchy In Competing Centres**

- 3.1 The role and draw of Braintree, Halstead and Witham is influenced by their own attraction and by other centres and locations with which they compete to attract trade. In order to understand this, we have assessed the roles of the centres in the context of other centres in the region.

#### **Catchment Profile – Comparison Goods**

- 3.2 The comparison goods catchment areas for Braintree, Halstead and Witham are attached at **Appendix 1** and have been defined by reference to survey work undertaken by Research and Marketing Ltd October-November 1999. This surveyed 1400 people within and beyond the district, covering 22 postal sectors. The results of the survey work are attached at **Appendix 2**.
- 3.3 The purpose of the survey was to allow a greater understanding of local shopping patterns and the perceptions of local people about the centres in which they shop.
- 3.4 To aid illustration the area of influence of each centre has been defined with a primary and secondary catchment identified. The primary catchment accounting for broadly 75% of the town centre turnover and the secondary area 20%.
- 3.5 For Braintree, the primary catchment can be identified as incorporating the Braintree urban area and extending to cover a number of outlying villages. This primary area extends approximately half way between Braintree, Witham and Halstead. The secondary area is significantly more extensive, including these three outlying centres and extending in the north towards Haverhill, in the south towards Colchester and Chelmsford and to the east to Marks Tey.

- 3.6 The Witham primary catchment covers the Witham urban area (CM82) and the postal sectors immediately to the north and south. The secondary catchment extends to the outskirts of Braintree, Marks Tey and in the west towards Chelmsford.
- 3.7 Halstead's primary catchment reflects the two principal postal sectors covering the town (CO91 and CO92). The secondary catchment extends in a north west – south east direction, restricted in the north by Sudbury and in the south by Braintree.
- 3.8 While these catchments reflect the postal sectors from which the centres draw trade, Sections 5-7 of this report confirms the level of influence the centres have within these postal sectors – market share.
- 3.9 In addition to the catchment plans deriving from the household telephone survey, Healey & Baker also hold under license the CACI in-site system. The model is designed to analyse the degree of interaction between centres and to present a realistic view of the extent of trade draw a centre has over a geographical area taking into account other competing centres. In this case, the catchments are split into 4 sectors, the primary accounting for 50% of the centre's turnover, secondary is 25%, tertiary 15% and the quaternary is 10%. Therefore, whilst not being directly comparable to the household survey plans in terms of the catchment profiling, they do give a good understanding of the areas of influence of these higher centres.
- 3.10 To understand the nature of the individual catchments for each of the centres, and the potential which exists within each individual sector to help inform the understanding of the role and function of each centre, it is also appropriate to consider the socio-economic circumstances. This is set out for each centre below.

Table 2: Socio-Economic characteristics of Braintree

CATEGORY	CATCHMENT SECTOR				NATIONAL AVERAGE %
	Iy	IIy	IIIy	IVy	
Population	20,014	4,764	4,313	3,193	-
Age Structure					
0-9	13.5	12.5	11.7	13	12.9
10-19	12.3	12	13.2	12.6	12.5
20-24	6.1	4.6	5.1	5.6	5.9
25-44	30.8	30	28.1	30.2	29.8
45-64	22.8	27.1	26.2	24.7	23.1
65+	14.4	13.7	15.8	13.8	15.8
Households	7,224	1,664	1,552	1,140	
- Owner Occupied	67.9	77.6	70.4	71.6	66.4
- Council/Rented	32.1	22.4	29.6	28.4	33.6
Car Ownership	73.2	85.8	81.1	79.8	66.8
Unemployment	4.1	3.2	2.0	2.6	4.7
Expenditure	2,950.55	2,994.73	2,971.83	2,926.56	2,955.32

Source: CACI, 1999

- 3.11 Braintree's catchment area tends to follow a similar pattern to national average statistics, particularly in relation to age profile. It does have a greater than average number of owner occupiers, higher car ownership and lower unemployment.

Table 3: Socio-Economic Characteristics of Witham

CATEGORY	CATCHMENT SECTOR				NATIONAL AVERAGE %
	Iy	IIy	IIIy	IVy	
1998 Population	16,853	4,942	3,833	2,835	-
1998 Age Structure					
0-9	13.4	12.6	12.8	12.7	12.9
10-19	12.9	12.2	12.6	12.6	12.5
20-24	6.5	4.7	5.6	5.2	5.9
25-44	31.5	28.7	30	29.2	29.8
45-64	22.9	27.3	24.3	25.7	23.1
65+	12.7	14.3	14.5	14.5	15.8
1991 Households	5,969	1,766	1,379	1,029	
- Owner Occupied	66.2	75.7	75.5	75.6	66.4
- Council/Rented	33.8	24.3	24.4	24.5	33.6
1998 Car Ownership	73.7	82.2	79.7	81.3	66.8
1998 Unemployment	3.3	2.2	2.9	2.8	4.7
Expenditure	2,976.16	2,938.39	2,930	2,878.41	2,955.32

Source CACI, 1999

3.12 Witham's catchment exhibits very similar socio-economic characteristics to Braintree.

Table 4: Socio-Economic Characteristics of Halstead

CATEGORY	CATCHMENT SECTOR				NATIONAL AVERAGE %
	Iy	IIy	IIIy	IVy	
Population	8,127	2,202	1,604	1,174	-
Age Structure					
0-9	11.5	12.8	13	12.2	12.9
10-19	12.1	11.3	12.2	12.9	12.5
20-24	5.5	4.5	5.5	5.5	5.9
25-44	28.9	28.5	30.6	27.5	29.8
45-64	25.5	26.4	23.6	25.6	23.1
65+	16.4	16.4	15	16.3	15.8
Households	43,016	792	581	444	
- Owner Occupied	69.3	68.5	73.2	71.8	66.4
- Council/Rented	30.7	31.6	26.8	28.2	33.6
Car Ownership	75.9	80.3	79.1	77	66.8
Unemployment	2.3	3.1	3.3	2.9	4.7
Expenditure	2,996.39	2,939.65	2,982.67	2,968.57	2,955.32

Source: CACI, 1999

- 3.13 Again, Halstead exhibits similar socio-economic characteristics to Braintree and Witham.

## **4.0 POLICY CONTEXT**

4.1 This section of the report provides an overview of the policy framework at national, strategic and local level relevant to retailing and town centres generally. It creates the policy context for Healey & Baker's advice.

### **National Planning Policy**

4.2 **Planning Policy Guidance Note 1: General Policy and Principles, February 1997** – Provides a strategic commentary on planning policy. In particular the Guidance Note:

- Reaffirms the role of the planning system in meeting the needs of the growing and competitive economy in providing for new development;
- Emphasises the contribution of the planning system to achieving sustainable development;
- Identifies ways in which mixed use development can be promoted; and
- Gives guidance on the operation of a plan-led system.

4.3 The key objectives identified for the planning system are to influence the location of different types of development relevant to transport and foster forms of development which encourage walking, cycling and public transport use.

4.4 The importance of town centres, is also reconfirmed. The national policy objectives are:-

- To sustain and enhance the vitality and viability of town centres;
- To maintain an efficient, competitive and innovative retail sector;

- To focus development, especially retail development, in locations where the proximity of the business facilitates competition from which all consumers are able to benefit and maximises the opportunity to use means of transport other than the car; and
  - To ensure the availability of a wide range of shops, employment, services and facilities which people have easy access to by a choice of means of transport.
- 4.5 When drawing up development plans, Local Planning authorities are encouraged to adopt a sequential approach to site selection for new retail development and other key town centre uses.
- 4.6 The guidance confirms the commitment to a plan-led system. This is given statutory force by Section 54A of the Town and Country Planning Act, 1990 which requires that when making any determination under the Planning Acts, regard is to be had to the Development Plan and a decision should be made in accordance with the adopted or approved Development Plan for the area, unless material considerations indicate otherwise.
- 4.7 **Planning Policy Guidance Note 3: Housing, March 2000** – Sets out the principles of providing land for housing. The guidance confirms that Local Authorities should promote development that combines a mix of uses, including housing. This is identified as important not only to accommodate new households, but to bring new life into our towns and cities.
- 4.8 To increase opportunities in town centres, Local Authorities should identify sites or areas where mixed use development can be promoted, including, where appropriate, specifying the proportion of floorspace which should be residential within such developments.

- 4.9 **Planning Policy Guidance Note 6: Town Centres and Retail Developments, June 1996** – Confirms the objectives of national policy, in terms of sustaining and enhancing the vitality and viability of town centres.
- 4.10 The guidance confirms at Paragraph 2.1 that town centres are part of our national and civic heritage, and securing their health helps to foster civic pride and local identity. It also helps promote sustainable development.
- 4.11 The vitality and viability of town and district centres depends on:
- Retaining and developing a wide range of attractions and amenities;
  - Creating and maintaining an attractive environment;
  - Ensuring good accessibility to and within the centre; and
  - Attracting continuing investment in development or refurbishment of existing buildings.
- 4.12 The PPG encourages Local Planning Authorities to implement town centre strategies, although confirms that the appropriate strategy will vary, depending on a town centre's role, attractions, accessibility and amenity compared with competing centres (paragraph 2.4).
- 4.13 At Paragraphs 2.5 – 2.6 it is confirmed that over the last few years most town centres have flourished, but others have begun to deteriorate. Some have been in decline for much longer and have failed to attract investment. The level of choice and quality in shopping has not been sufficiently attractive to customers. Variety and activity have decreased. The Government wishes to see these town centres modernised and refurbished, but expects Local Authorities, landowners and developers to be realistic in their expectations. Attempts to go back to past patterns of use, against the market trends which led to deterioration, are unlikely to succeed. Diversification of uses may be the best way forward. Vitality and

viability may be found in a wider mix of uses that fits better with the surrounding community and change in retail patterns. Local Authorities should consider these in consultation with retailers and others when drawing up their strategies.

4.14 In order to monitor the health of their town centres, Local Authorities are encouraged to regularly collect information on key indicators. This should enable early signs of deterioration to be identified, a fuller analysis to be made, if necessary, and appropriate action to be taken. Local Planning Authorities may sometimes need to manage the decline in the relative importance of the centre as other centres expand.

4.15 It is indicated that one way of encourage private investors and infrastructure providers to enhance town centres is for the Local Authority to involve them in the preparation of a town centre strategy. In partnership with the private sector, property owners, infrastructure agencies and the community, the Local Planning Authority should:-

- Assess the role of the town centre and the scope for change, renewal and diversification;
- Identify the essential qualities of the centre and seek to ensure that it meets the needs of the community it serves; and
- Draw up a strategy and action plan for the centre.

4.16 The strategy should be translated into the Development Plan at the first opportunity. This is essential to provide the planning framework for the strategy, including:-

- Locational policy;
- Identified sites, especially if site assembly using compulsory purchase powers is required; and

- Traffic management and parking policies.
- 4.17 The PPG also confirms that diversity of uses in town centres, and their accessibility to people living and working in the area, make an important contribution to their vitality and viability. Where vacant office and retail premises seem unlikely to be used for that purpose, Local Planning Authorities should encourage conversion to other service, leisure or residential uses. Some buildings, especially older office buildings and upper floors above shops, maybe particularly suitable for conversion to flats.
- 4.18 It is confirmed that large foodstores and supermarkets often play a vital role as anchor stores in maintaining the quality and range of shopping in smaller towns and district centres. They are also essential for the less mobile members of the community.
- 4.19 In drawing up Development Plans, Local Planning Authorities should, after considering the need for new development, adopt a sequential approach to selecting sites for new retail development. Both Local Planning Authorities and developers selecting sites for development should be able to demonstrate that all potential town centre options have been thoroughly assessed before less central sites are considered for development for key town centre uses. If, however, there is no need or capacity for further developments, there will be no need to identify additional sites in the town.
- 4.20 This guidance has subsequently been expanded upon in various ministerial statements, most notably on the matter of ‘need’. In essence, in relation to retail and leisure, where proposals fall outside an existing town centre or are inconsistent with the development plan strategy, there is now a requirement to demonstrate need.

- 4.21 **Planning Policy Guidance Note 13: Transport, March** – Provides advice on integrating transport and land-use planning. It reflects a commitment to sustainable development, the principal aim being to reduce reliance upon the private car by encouraging more efficient journeys and alternative means of travel.
- 4.22 In relation to retail development it is confirmed that the most appropriate way of achieving the overall aim of the guidance is to concentrate shopping development and associated uses in existing centres. Policy for retail and leisure should: *“seek to promote the vitality and viability of existing town centres, which should be the preferred location for new retail and leisure development”*.

### **Interpretation**

- 4.23 The guidance provided in PPG1, PPG3, PPG6 and PPG13 (and draft) is the principal national policy framework determining the future location of retail development and other associated uses. This has been supported by ministerial statements.
- 4.24 The present Government has stated its clear intention to pursue sustainable development options. A key factor within this overall approach is to integrate transport systems and to encourage most travel generating uses to locate where they would be accessible to all members of the community.
- 4.25 Emphasis is also placed upon developers and Local Authorities to ensure the best use of existing land through regeneration of under used land and the creation of efficient and effective forms of development.
- 4.26 Having regard to Central Government Revisions to Planning Policy Guidance and statements and speeches, we consider that these key strands of policy are set to continue and to form the basis of future policy reviews.

- 4.27 Consequently, the importance of town and city centres will become increasingly paramount particularly set against the retail trends outlined in the previous section. Emphasis is likely to be on integrated solutions, where the functioning and integration of town centre activities will be key.

### **Strategic Guidance – Regional Planning Guidance for the South-East**

- 4.28 **Draft RPG9, December 2000** - confirms the broad format of national planning policy. Town centres should be the preference for retailing locations and town centre strategies and management schemes should be pursued. The scope for existing centres to accommodate growth should be considered alongside the need to minimise travel by car.

### **Structure Plan Policy**

- 4.29 The adopted **Structure Plan for Essex** is the **Second Alternation**, January 1995. Under **Policy SH1** a retail hierarchy is identified. Basildon, Chelmsford, Colchester and Harlow are identified as sub-regional shopping centres along with the Lakeside Centre at West Thurrock. Along with 19 other centres, Braintree, Halstead and Witham are identified as district shopping centres.
- 4.30 The County Council published a **Draft Replacement Deposit Plan** in February 1998. Following local Government reorganisation in April 1998, Essex County Council and Southend-on-Sea Borough Council became jointly responsible for the Replacement Structure Plan. Southend-on-Sea Borough Council could not accept the contents of the Draft Deposit Plan in certain key areas. As a result a Bridging Document setting out a revised Written Statement and Key Diagram was placed on Deposit.

- 4.31 An examination in public took place between 22<sup>nd</sup> June and 16<sup>th</sup> July 1999 and the Report of the Panel was published in December 1999.
- 4.32 **Policy TCR1** sets out the retail hierarchy of the County. It continues to identify Basildon, Chelmsford, Colchester, Harlow and Southend as sub-regional town centres and also includes Braintree, Halstead and Witham within the next tier under ‘Principal Town Centres’. The policy confirms that smaller town centres, district centres and local centres will be defined and specifically identified in adopted Local Plans.
- 4.33 The Panel Report recommends that the list of centres included within the ‘Principal Town Centres’ category should be reviewed and the smaller centres, which no longer merit such status, should be removed. At this stage, it is not clear which, if any, town centres will be removed from this hierarchy.
- 4.34 The context for the Panel Report’s consideration of town centres and retailing is confirmed as “*the replacement Structure Plan is being prepared at a time when the multi-purpose role of town centres is being recognised and supported by existing and emerging policy guidance. The foundations of this approach are set out in PPG6 and reflected in other strands of policy including PPG1 and PPG13*”.
- 4.35 **Proposed modifications** to the Replacement Structure Plan were published in March 2000. With respect to the Panel Report’s recommendation to Policy TCR1, the Council accept that there would be some merit in reviewing the list of Principal Town Centres but at this stage of the Plan adoption process, they do not consider it appropriate to make a fundamental amendment.
- 4.36 On the basis that Regional Guidance is being reviewed and the Replacement Structure Plan (RSP) is based on the adopted RPG9, as soon as the RSP is adopted the intention is to commence with a First Alteration. As part of this

process a study will be commissioned to consider town centres and retail potential to inform an approval of the retail hierarchy. This report is likely to be published in mid-2001. It is not clear, therefore, whether Halstead or Witham will be downgraded.

### **Current Local Plan Policy**

- 4.37 **The Braintree Local Plan was adopted in February 1995** and has a plan period to 2001. Whilst this report has been commissioned to inform the review of the local plan, it is important that there is an understanding of current policy, to ensure consistency, where this is appropriate.
- 4.38 The Plan confirms that the main concentrations of population are located along the A12 and A120 corridors in the south of the District where the pressure for development is greatest.
- 4.39 In the south of the District, Braintree and Witham are identified as the areas to accommodate the development pressure. In Braintree major new planned communities are under construction at Marks Farm and Great Notley which will be commitments well into the review of the Local Plan and beyond 2006. The development of Marks Farm also includes provision of a foodstore which has received detailed planning permission opened for trading in April 2001.

### **Braintree Town Centre**

- 4.40 The Local Plan identifies Braintree as a major district shopping centre offering a wide range of convenience and comparison goods. It notes that its twice weekly street market is an added attraction lending character to the town.

- 4.41 The development of George Yard in 1989/90 has added a substantial area of new shopping floorspace to the town. No major new shopping proposals are therefore put forward in the Plan for the town centre. The Plan does recognise, however, that some minor additions may occur and specifically identifies the potential for the development of specialist units in connection with the development of the site to the rear of the Town Hall Centre. This essentially reflects the advice given by Healey & Baker in the 1992 Retail Study which informed the preparation of the adopted Plan.
- 4.42 The Local Plan Proposals Map defines a shopping area in which it is intended to contain retail uses to ensure a continuing compact shopping area. This does not, however, indicate primary and secondary retail frontages or distinguish between areas where Class A1 uses may be preferred over non-retail uses (A2, A3, etc).
- 4.43 The Plan goes on to note that the centre lends itself particularly well to pedestrianisation and it is a fundamental part of the Plan to create a traffic free shopping environment and to carry out high quality environmental improvements schemes, including pavings, landscaping, and upgrading of street furniture and street lighting. The purpose of this is to attract high quality specialist shops and a good range of ‘High Street’ shops.
- 4.44 Of particular importance, the Plan identifies as a specific aim the relocation of the bus terminus from Victoria Street to the railway station. A bus stop is expected to be retained in Victoria Street/Farfield Road.

Witham

- 4.45 The adopted Local Plan includes an allocation for 800 dwellings in the South Witham area between Maltings Lane and the A12 trunk road along with a new Business Park, Neighbourhood Centre and primary school. Development is to be implemented in accordance with the approved Development Brief for the site.
- 4.46 The Plan notes that pedestrianisation of Newland Street was considered in the late 1980's and early 1990's although following local opposition the County Council did not pursue the scheme.
- 4.47 The Plan also notes that there are a number of areas in the town centre that would benefit from environmental improvement. It was noted that the Council intended to provide a Concept Plan for Newland Street and associated streets to indicate proposals. This was expected to include paving, landscaping and the rationalisation of signs and street furniture. This was to be undertaken following the agreement and introduction of traffic management measures for the town centre.
- 4.48 The Local Plan noted that the Newlands Precinct, service yards and surrounding areas including Lockram Lane and Coach House Way present a rundown and dated appearance. The area is considered important in townscape terms since it is located in a conservation area and includes several important listed buildings. Consequently, the Plan indicated that the District Council would prepare a development brief to consider the comprehensive refurbishment and/or redevelopment of this area.

Halstead Town Centre

- 4.49 With the emphasis on concentrating large new developments at Braintree and Witham, the plan strategy for Halstead is to conserve and enhance its character as a small country town. The emphasis in the Plan is therefore one of limited development in the town with proposals for conservation, environmental improvement, improved recreation and for traffic relief through the provision of a by-pass.
- 4.50 Retail policies therefore seek to preserve Halstead Town Centre and new shopping uses will be resisted in Head Street north of the northern junction of the A131 with the A604, Headingham Road and Parsonage Street, which are affected by adverse factors such as heavy traffic flows along relatively narrow streets or a lack of suitable parking and servicing facilities.
- 4.51 A town centre shopping boundary is included on the Proposals Map for Halstead although no primary or secondary frontages are defined. A policy on non-retail uses in the town centre seeks to resist proposals other than for retail on the ground floor frontages of the High Street.
- 4.52 The original conservation area of Halstead was designated in 1969 and was extended in 1977 and 1986. The Plan's focus is therefore to retain the many historic buildings in the town centre and to ensure that new development is sympathetic to the status of the town centre as a conservation area. A number of environmental improvement options are included in the Plan such as an environmental improvement scheme for Factory Lane East including undergrounding of overhead cables and paving and a Concept Plan produced for the High Street and Market Hill showing paving materials, street furniture and lighting which will be implemented as and when funds permit.

## **5.0 BRAINTREE TOWN CENTRE**

### **Healey & Baker Reports, 1992 and 1995**

- 5.1 Having provided the economic, regional and policy context for the Study, this section specifically considers Braintree Town Centre. It starts with a review of previous Healey & Baker study findings, followed by health check, capacity study, SWOT analysis and recommended strategy for the town centre.
- 5.2 As noted in Section 1, Healey & Baker prepared a Retail Study for the District Council in 1992 and updated the Study in 1995. These reports focused exclusively on Braintree Town Centre and therefore did not consider Halstead or Witham Town Centres. The main findings of each report is set out below as background information.

### **1992 Report**

- 5.3 The 1992 study concluded that Braintree performed a role of a major District centre, principally catering for and providing as full a range of convenience goods as possible, as well as maintaining a comprehensive choice of comparison goods. In accordance with its profile, Braintree's anchor traders are food based and its comparison goods function is limited as a result of the inferior range and depth of goods and traders compared to higher order centres in Braintree's catchment area such as Chelmsford and Colchester. It was concluded that Braintree meets the needs of the lower order shopping trip, a trip which is often combined with a convenience goods shop. The town centre is therefore principally a food shopping destination.

- 5.4 The report concluded that the George Yard development (completed in 1990) had enhanced the attractiveness of Braintree as a shopping location and, as was expected, has resulted in a realignment of the focus of retailing in the town centre. The period of readjustment had been extended as a result of the national economic climate and was considered likely to continue for at least a further 1 or 2 years (ie. to 1993-4). During this period of readjustment, it was considered that all sectors of retailing in the town centre were sensitive. Particular concern was raised about local independent traders which play a key role in the centres function.
- 5.5 Advice was given that in 1992 there was little likelihood in the then current economic climate for the town centre to attract new comparison goods retailers, and in so far as new retailers may have had requirements for the town, existing vacant floorspace was identified as available. In terms of convenience goods, the town was considered to offer a reasonable range, but from premises with qualitative deficiencies in comparison with the standards achieved in the large new foodstore developments which were being developed elsewhere within the catchment.
- 5.6 The immediate objective for the Council was therefore identified as to maintain the current level of retail floorspace in the centre and to improve the qualitative convenience goods shopping facilities to serve the residents of Braintree and its catchment.
- 5.7 This advice was incorporated into Local Plan policy (as set out in Section 4) where the Plan notes the effect of the development of George Yard and the requirement for a period of adjustment. Consequently, no significant new development proposals/allocations were made.

### **1995 Report**

- 5.8 The 1995 update sought to reassess the strengths and weaknesses of Braintree Town Centre, review the trading characteristics of committed and proposed retail floorspace in the catchment and appraise the effects of alternative scenarios regarding the nature of a foodstore at Marks Farm.
- 5.9 At that time, the Marks Farm neighbourhood, which was an area of housing growth together with a local centre, was the subject of uncertainty. Interpretation over a planning permission for the local centre was disputed, and proposals indicated the prospects of a foodstore of 2,787 sq m rather than the Council definition at 1,858 sq m. High Court action ensued which concluded with support for the lower floorspace. Safeway withdrew from the opportunity as a consequence.
- 5.10 In the period between 1992 and 1995 growth in foodstore provision within and adjoining the catchment area took place with the development of Tesco stores at Great Dunmow and Great Notley, the Safeway at Witham and the proposed extension to the Sainsbury store in Braintree Town Centre. Given the rapid increase in floorspace within the catchment area between 1992 and 1995 including the Marks Farm commitment, it was advised that much of the capacity for additional convenience foodstore floorspace had been taken up.
- 5.11 It was identified as fundamental to the continuing trading and health of Braintree town centre that the proposed extension to the Sainsbury store took place. This would allow the town centre to compete with the off-centre facilities both developed and committed, and maintain its trading position. Concern was expressed in the 1995 Report about the prospect of a larger scheme at Marks Farm, with the potential for it to have a harmful effect on the town centre.

- 5.12 As a consequence, the 1995 study recommended that the Council adopt a cautious approach to further retail development throughout the district, having regard to the vulnerability of the town centre and the need to protect the roles of the neighbourhood centres. As part of this approach the Council were advised to resist further out-of-centre retail development to 2001.

### **Town Centre Health Check**

- 5.13 This health check section presents a picture of the relative health of Braintree Town Centre in 2000 benchmarked against competing and comparable centres and related back, where possible, to historic data.
- 5.14 The analysis is based upon the vitality and viability indicators set out in PPG6 and augmented by additional indicators considered appropriate, such as multiple retailer representation and trader intentions. These indicators should be taken together to consider fully the vitality and viability of the town centre.

### **Structure of Town Centre and Development Activity**

- 5.15 Braintree has maintained substantially its historic street pattern from medieval times with many of its buildings being listed. The whole town centre is identified as being within a conservation area. Many of the units in the principal retail frontages therefore have small and irregular dimensions not ideally suited to modern retailer requirements.
- 5.16 Prior to 1976, retail provision was concentrated on High Street and Great Square on a south east-west alignment with Bank Street leading north of High Street at the intersection between High Street and Great Square. Located east of Great Square the rectangular Market Place completed the compact town centre and is the venue for the popular twice weekly markets.

- 5.17 More secondary retail frontages were established to the north of Bank Street on Rayne Road, Bocking End and Coggeshall Road, and south of Market Place on Fairfield Road.
- 5.18 In 1976, the street pattern of the town centre was extended by the development of the Tesco supermarket fronting onto Market Place and the associated retail units created along a new return street (Market Street/New Street) which linked Market Place via the Tesco supermarket to Great Square.
- 5.19 In 1982, the J Sainsbury supermarket was constructed along with units in Drury Lane to the north of Market Place and to the east of Bank Street.
- 5.20 These new developments added significant new floorspace to the town centre and created new anchor traders that extended and drew the focus of retailing in the centre to the east of the traditional shopping core. These developments included the introduction of substantial public/store associated car parks, which in themselves enhanced the centre for shoppers and also affected patterns of pedestrian movement into the centre reinforcing the centre's shift in focus to the east.
- 5.21 The new retail foodstore floorspace changed the balance of the centre from a largely comparison orientated destination to a convenience goods based centre. The foodstore offer of the town and the town centre remains extremely strong.
- 5.22 In 1990, the George Yard development was completed comprising a purpose built open air shopping mall on an east-west alignment at the intersection of Bank Street and High Street. The development provided 36 units, of which the majority comprised large regular shaped regular unit accommodation. The western end of the mall comprised Quadrant and Iceland and multi-storey car

park providing for 712 car parking spaces. Somerfield now occupy the building that pre-dates the George Yard development that was formally occupied by Kwik Save and B&Q.

- 5.23 The development clearly reflected demand from retailers for regular shaped large shop units in an attractive pedestrian location close to car parking provision and linking to or creating prime pitch. As a consequence, a number of the occupiers of the irregular and small scale retail units, which predominated in the town centre before the George Yard development, relocated into the George Yard development including Boots the Chemists, Dorothy Perkins and the Co-op department store.
- 5.24 The development of the George Yard scheme and the Kwik Save supermarket (now Somerfield) and Iceland Frozen Food store refocused the town centre's alignment east-west between the existing Tesco and J Sainsbury supermarkets and the George Yard scheme.
- 5.25 George Yard has replaced High Street/Bank Street as the principal shopping focus of the town centre. High Street remains a relatively strong retail location, although under pressure from non-A1 uses and almost exclusively occupied by independent retailers.
- 5.26 Bank Street also remains relatively strong with a number of national multiple retailers in larger shop units. Again this location is coming under threat from non-A1 users, and the principal anchor store in this location – Argos (Bocking End) has the perception of being relatively removed from the retailing area, diluting its effectiveness and the cohesion of this part of the centre.

- 5.27 The development of Market Street/New Street linking Tesco to Great Square in 1976 has not been a particularly successful addition to the town centre. Many of the units have remained consistently vacant. The poor configuration, limited unit size, the Tesco store long blank frontage and its anonymous nature, provides little reason for shoppers to visit this part of the town.
- 5.28 Outside of the town centre, Braintree Retail Park was completed in 1990 providing accommodation for 6,930 sq.m in 5 units, a process of rationalisation in this area continues, as part of the Freeport proposals referred to below.
- 5.29 Freeport Leisure have developed an outlet village of 13,935 sq.m gross which opened in December 1999 at Chapel Hill. Whilst it is too early to tell the effect of this scheme on the town centre, previous analysis carried out in support of the application suggest that the majority of shoppers would travel to the FOC from beyond 20 minutes, and that the trade diversion from Braintree Town Centre would be limited. The legal agreement associated with the application contributed a sum of money to town centre improvements, and ensures the provision of a shuttle bus between the two locations, which appears to be well patronised.
- 5.30 In mid-2000, Freeport Village submitted an application to extend the centre by 2,350 sq.m, as part of a comprehensive development package, including a cinema and a swimming pool. The Council has resolved to grant planning permission subject to a legal agreement.

#### Retailer Representation

- 5.31 In line with the development activity experienced by Braintree town centre and trends at a national level, retailer representation in Braintree town centre has changed over time.

5.32 Table 1 (below) represents an analysis of the GOAD Plans for the town centre dated February 1984, January 1994 and November 1999.

**Table 1: Changes in Retail Provision**

<b>USE</b>	<b>1984</b>	<b>1994</b>	<b>1999</b>
Convenience (Supermarkets)	2	4	4
Convenience (Other)	5	5	3
Class A1 Fashion (NMR <sup>1</sup> )	5	9	9
Class A1 Other (NMR)	10	18	19
Class A1 Independent	104	80	82
Class A1 Service	2	13	16
Class A2 Financial and Professional	20	30	30
Class A3 Pubs	9	8	11
Class A3 Restaurants/Take-aways	8	14	26
Charity Shops	1	7	10
Vacant	9	28	24
<b>Total:</b>	<b>175</b>	<b>216</b>	<b>234</b>

<sup>1</sup> NMR – National Multiple Retailer

5.33 Table 1 shows clearly a number of trends. While supermarket provision increased the number of smaller convenience outlets has decreased. Dewhurst Butchers, F Cloughton Fruit and Vegetables and Victoria Wine have all vacated the town centre.

5.34 One independent butcher remains, ‘Meat-Inn’, and one convenience outlet opened in the town centre between 1984 and 1999 - ‘Natural Way Health Foods’ - which is likely to reflect a general move towards lifestyle retailing.

5.35 The national multiple retailer count has also increased although minimally since 1994, principally reflecting the development of the George Yard Centre and the provision of accommodation which meets current standards of floorspace and design sought by multiples. This has resulted in both retailers relocating from

other parts of the centre, such as the Co-op department store, and also new in-movers such as Superdrug, Our Price, WH Smith, Kwik Save (replaced by Somerfield) and Iceland.

- 5.36 Another important in-mover has been the Argos Catalogue showroom taking a large vacant unit at Bocking End. However, because of the units separation from the retail core of the town centre and the surrounding non-retail uses, this has not helped to anchor this part of the centre to the extent which its potential would suggest.
- 5.37 In line with national trends, the number of independent retailers decreased between 1984 and 1994 reflecting the development of the George Yard Centre, the amalgamation of smaller units into larger units to cater for the type of units sought, the general economic recession which resulted in several of these retailers having to cease trading and the replacement by Class A2 uses reflecting the deregulation in the banking sector over this period and the increase in Class A1 service uses and Class A3 restaurants and fast foods. A number of independent retail units that have ceased to trade have been temporarily occupied by charity shops which have increased from one representation in 1984 to 10 in 1999.
- 5.38 Since 1994, the limited development activity in Braintree Town Centre has meant that retailer representation has remained constant. This appears to reflect the period of assimilation and adjustment following the George Yard development, together with national retailing trends.
- 5.39 Since the opening of the Freepost Leisure Village approximately 1½ years ago indicators suggest that Braintree Town Centre has seen an uplift in visitors. Evidence from the car park usage and shuttle bus patronage between the FOC and the town centre are encouraging.

- 5.40 The FOC permission itself was carefully constructed to ensure that the FOC was complementary to the town centre rather than harmful. It is too soon to establish the exact effects of the development on the town centre, particularly in terms of town centre trading levels but early indications of visitor movement appear promising.
- 5.41 Of the retailers in Braintree responding to the questionnaire, Woolworths confirmed that their trading had remained broadly static, although they still were trading above average (now extended their store). New Look confirmed that their store was trading at about average levels, Boots had witnessed an improvement in trading above company average levels and Superdrug had witnessed an improvement in trading to an average level.
- 5.42 In terms of retailer requirements, a number have been identified, including Aldi Stores, Benson Shoe/Discount Shoes, Blockbuster Video Hire, Breakers Clothing, Currys Electrical Stores, and Holland & Barrett Health Foods.

### **Diversity of Uses**

- 5.43 Braintree is a market town and is the principal centre covering a relatively extensive hinterland. Consequently, the town centre accommodates a number of uses which reflect its status as a major district centre.
- 5.44 The town centre is dominated by its retail function which is interspersed by a number of traditional public houses and more modern restaurants, wine bars and themed pubs.
- 5.45 The centre also has a modern purpose built library, off Fairfield Road, which is a significant attraction and addition to this part of the town centre. Adjacent to the

Library is the job centre and the Town Hall Centre, with the Braintree District Museum accessed from Manor Street.

- 5.46 The centre accommodates a number of smaller office suites above shops in converted residential properties and stand alone office units. In addition, there are a number of medical practitioners who operate from the centre together with dental surgeries. There is a limited number of residential dwellings within the centre, although the centre is generally ringed by residential accommodation.
- 5.47 The town centre bus station is located in Victoria Street and the Eastern National (First Bus) Bus Depot is located close by in Fairfield Road.
- 5.48 The Council offices are a short distance from the town centre, at Bocking End.

### **Shopping Rents**

- 5.49 Rental levels hit a high in Braintree Town Centre in 1990, reflecting the then property boom of the late 1980's. Between 1990-1995 rental levels decreased to between £40-£45 and this has been a generally stable level to 1999. Healey & Baker consider that current Zone A rental levels would most likely be placed at £42.50 in prime retail locations.
- 5.50 This is a general reflection of smaller town centres throughout the UK, where retail demand remains relatively limited and rental growth is static. Larger centres which are the subject of focused retail demand have witnessed significant growth over the past ten years, with Zone A rents in Chelmsford at £165 (1999) and in Colchester £155 (1999).

### **Vacancy Levels**

- 5.51 Braintree currently has 28 vacant units of 223 total outlets. This represents a vacancy level of 12.5% which is marginally above the national average level, which currently stands at approximately 12.25%.
- 5.52 Most town centres have a certain number of vacant units and this is often considered as desirable for a healthy town centre, where the opportunity for new retail operators or existing retail operators trading-up can have advantages, in a dynamic retail industry.
- 5.53 The vacancies in Braintree are dispersed throughout the centre, with three vacant units in George Yard which are potentially a cause for concern. These units have never let and are in a shell condition. They are being offered to the market at competitive rental levels with significant incentives, but have not proved attractive to retailers.
- 5.54 There is one significant vacant unit in Bank Street (No.25a) which we would anticipate should find a new operator. Other vacant units are generally found in poorer trading locations such as Rayne Road, the western end of High Street but significantly, there is a concentration of vacant units in the New Street/Market Street arcade, where six units are currently vacant.
- 5.55 Whilst this level of vacancy has not reached the stage where it represents a serious threat to the vitality and viability of the town centre as whole, it does have a harmful effect on certain individual locations. The situation should be monitored closely.
- 5.56 On the positive side, the significant vacancy at No.25a Bank Street has now been taken up by an extension of the Woolworths store.

### Yields

- 5.57 Current yields within the town centre are in the region of 7.5%. This has changed little from previous years and reflects the general investment prospects for Braintree town centre.

### Pedestrian Flows

- 5.58 Pedestrian flow in the town centre is generally dispersed, although there are appreciable flows on a west-east axis through George Yard, Great Square and Market Place. This links the key anchors in the centre, ie. the Tesco/J. Sainsbury stores at the eastern end and the George Yard scheme to the west. It also reflects the significant areas of car parking associated with the centre ie. the 712 space multi-storey adjoining George Yard and the car parking associated with the food stores. Pedestrian flows are less marked in the High Street area, although movement in this area is witnessed nonetheless. Beyond this area, there is no discernible pattern to pedestrian movement. One noticeable situation is, however, that the New Street/Market Street arcade is little used by pedestrians.
- 5.59 Braintree District Council undertook pedestrian flow counts on Tuesday 19 and Wednesday 20 October 1999 within the core of the town centre. These flow counts are attached at **Appendix 3**.
- 5.60 Most notable is the increase generally in pedestrian movement on the Wednesday which is a market day and over the lunchtime period. Generally, the flows confirm the George Street/Great Square axis but also confirm the strength of Bank Street, at least at the southern end.

- 5.61 The importance of market day is illustrated by an almost doubling of pedestrian movement on Wednesday.

#### Accessibility

- 5.62 Braintree Town Centre is accessible by a number of means of transport. The BR station is located just beyond the town centre to the south, whilst the bus station is located at Victoria Street. Car access to the town centre is relatively easy, with a number of car parks located towards the periphery of the centre, giving easy access.
- 5.63 The level of car parking within Braintree Town Centre is extremely good for a centre of this nature, with dedicated car parks allowing for about 1,043 spaces (weekdays), together with a number of on street spaces catering both for the disabled and general public.
- 5.64 The pedestrian environment within the centre is relatively good, with George Yard being completely pedestrianised, and Great Square for access only. High Street is for dedicated buses and loading only. Market Place does allow the penetration of cars, with some parking spaces available.
- 5.65 In general terms, Braintree Town Centre is welcoming of the pedestrian.

#### Customer Views & Behaviour

- 5.66 The shopper survey (**Appendix 2**) indicated that most respondents considered that it was a benefit that Braintree was close to home, as being their choice for a shopping centre. Of concern, was that 24% of respondents thought that there was nothing or very little to like about Braintree Town Centre. Only 9% thought that the centre offered a pleasant environment, 9.5% that it was friendly. Indeed,

24.5% of respondents positively disliked the range of goods on offer within the centre, 12.7% a lack of entertainment and 7.7% the environment and atmosphere of the centre. 6% considered that there were too many empty shop units within the centre.

#### Perception of Safety & Occurrence of Crime

5.67 During daytime hours Braintree town centre is a safe environment with little evidence of significant crime. In the evening and at night-time more incidents are noted but not to such an extent that Braintree could be described as unsafe.

#### Environmental Quality

5.68 Braintree has an historic core, and a strong townscape quality. The George Yard scheme blends with this townscape and makes a welcome contribution to the centre as a whole. The town centre has generally a domestic feel, indispersed with quality new architecture, including the library.

5.69 Significant improvements have been made to the pedestrian environment and to the environmental quality of the centre. Further opportunities exist to enhance the overall environment, by rationalising street furniture, pavings, etc and the financial contribution made by Freeport Leisure will allow the Council to initiate a programme to pursue such benefits.

#### Capacity Analysis

5.70 A Capacity Analysis has been undertaken in relation to both food and non-food for the Braintree catchment area. This type of analysis allows the Council to appreciate the potential for further retail floorspace within the Borough over the local plan period.

- 5.71 The analysis has been undertaken based upon the household telephone questionnaire survey undertaken throughout and beyond the Borough, to establish the likely catchment of each centre for individual goods types, the shopping patterns of the catchment area and the potential for each centre to capture either wider market share from existing catchment areas or to extend these catchment areas.

#### Food Retailing

- 5.72 The retail assessment in relation to Braintree is contained at **Appendix 4**. In preparing this assessment regard has been had to the shopper survey and the shopping patterns which this distinguishes. Our own observations on trading patterns are also factored into the assessment.
- 5.73 The catchment plan at **Appendix 4** relates to Braintree's influence in terms of convenience retailing.
- 5.74 **Table 7** of Appendix 4 confirms the food retail provision in Braintree. There is an existing Tesco foodstore within the town centre, together with a J. Sainsbury superstore and Somerfield foodstore anchoring the George Yard scheme together with a smaller Iceland store. At the time of the household survey, the Co-op in the town centre also had a food retail element. The remaining food retailing within the centre accounted for 929 sq.m net. In addition to these town centre retail facilities, there is also a relatively modern Tesco foodstore as part of the Great Notley development.
- 5.75 As a consequence, as of 1999 the food retail facilities in Braintree, particularly the town centre, were strong and the quality of provision good.

- 5.76 These factors are reflected in the catchment plans associated with convenience retailing in Braintree (**Appendix 1**). This confirms a significant area of influence, covering the majority of the district. The primary catchment area, accounting for 50% of the market share of the individual postcodes reflects the Braintree urban area and its immediate environs. The secondary catchment is significant, covering a number of villages to the west, north-west and north whilst the tertiary catchment falls primarily to the east and south-west.
- 5.77 Generally, the enhanced convenience facilities to the south of the catchment at Whitham, Colchester and Chelmsford are reflected by the lack of influence that the Braintree facilities have over this area whilst the limited facilities to the north appear to account for a significant proportion of trade.
- 5.78 Interestingly, the retention level within the primary catchment, ie. the overall level of expenditure within the postal sectors spent in food retail facilities within Braintree was at 1999 87%.
- 5.79 This is a strong level of trade retention, confirming the dominance of Braintree within the immediate sub-region.
- 5.80 **Tables 10, 11 and 12** of appendix 4 factor in growth between 1999 and 2001, taking account of the likely trading pattern of the new Tesco at Marks Farm and the cessation of food retailing from the Co-op store in George Yard.
- 5.81 We estimate the effect would be a reduction in total town centre food retail turnover from £54.4m to £44.8m. This is a reflection of the level of trade that is likely to be drawn from the town centre, particularly the Tesco store as a result of the Marks Farm development. As indicated above and in the tables, Braintree already captures a significant proportion of local expenditure and the ability of a new store to capture greater levels of expenditure is severely limited. As a

consequence, the provision of a new store such as the Tesco at Marks Farm is likely to recycle existing trade, which is currently primarily town centre based. Whilst it is anticipated that some of the turnover associated with the Marks Farm development (circa 10% - £1.5 million) will be new trade to the Braintree area, the majority will originate and be spent locally already.

- 5.82 In considering the potential for Braintree town centre to accommodate any further food retailing over the plan period, an assessment has been undertaken having regard to growth in expenditure and population over the plan period, with a generally static food retail turnover. As a consequence, the difference between existing turnover and future available expenditure within the catchment area represents capacity.
- 5.83 In this case capacity at 2006 would equal £0.5m, increasing to £0.8m at 2011. However, it should be noted, that in normal circumstances capacity may be judged having regard to each of the retail facilities operating at equilibrium levels or company average levels. If this were the case in relation to Braintree, then the conclusion would be an over-provision of food retailing facilities within the Borough over the plan period as all the principal stores are trading at below company average levels. This is a reflection of the extremely good food retailing provision within the Borough, and particularly within the town centre.
- 5.84 As a consequence, within Braintree's immediate catchment, we do not consider there is any "real" capacity over the plan period. The only prospect of this capacity being extended would be to enhance Braintree's market share within the wider catchment, and we do not consider that there is any retail concept that would allow this to happen without impact upon retailing patterns within the town centre. Alternatively, if one of the existing retailers in the town centre were to close, this may also free-up some capacity within the town centre. However,

the ability of this capacity to be met by another foodstore, will need to be considered on its merits at the time.

### Comparison Retailing

- 5.85 The comparison retail provision in Braintree is a complicated one.
- 5.86 There are three principal sources of retail turnover associated with Braintree. Firstly, Braintree Town Centre, secondly Braintree Retail Park and now thirdly the Factory Outlet Centre which opened for trading in December 1999. The telephone questionnaire survey was undertaken prior to the opening of the Factory Outlet Centre and, therefore, gives only an indication of the shopping patterns associated with the former two shopping locations (**Appendix 2**).
- 5.87 In the case of the comparison retail maps (**Appendix 1**), as opposed to the convenience retail maps, the catchments are defined by having regard to the areas from which the town centre draws its trade, rather than the proportion of trade drawn from each postal sector.
- 5.88 As a consequence, in the case of Braintree town centre, it is evident that 75% of the town centres trade is drawn from the Braintree urban area and immediately surrounding postal sectors. A further 20% of the town centres catchment area is drawn from a significantly wider area, particularly extending towards the west and north, reflecting the lack of alternative provision and less so towards the north-east, reflecting the influence of Sudbury. Whilst this secondary catchment area would also cover Witham and its environs, Braintree has significantly less influence in areas closer to Colchester than Chelmsford.

- 5.89 The map relating to the Braintree Retail Park confirms a wider primary catchment area (which does not necessarily mean that it has greater influence in this area) together with a significant area of influence and secondary areas extending well up to the north, to include Halstead.
- 5.90 The retail tables in **Appendix 5** respond to the shopper survey work which was undertaken, splitting out the various retail sub-sectors, to understand better where people currently undertake their shopping trips.
- 5.91 **Table 5** confirms that the town centre provision is estimated, as of 1999 to have had a turnover of £36.88 million. We consider that of this 95% is generated from within the study area with 5% coming from beyond. Based on a floorspace of 11,275 sq.m net, this would indicate a turnover for comparison retailing in Braintree town centre of 3,271 per sq.m.
- 5.92 **Table 6** of **Appendix 5** projects forward the estimated (actual) expenditure of Braintree town centre based on an increase of 0.5% per annum to reflect improvements in floorspace efficiency, whilst plotting this against the expenditure which would be attracted to Braintree town centre if it maintained its 1999 market share. This exercise has been done for 2001, 2006 and 2011. The difference between the actual expenditure and the potential expenditure if market share is maintained, is identified as the potential capacity. At 2001 this is £3.2 million, 2006 £7.2 million and at 2011 it is £11.71 million.
- 5.93 Care should be taken when considering these figures and it should not automatically be assumed that this capacity could accommodate the equivalent level of floorspace as indicated in Table 6A. The reasons for this are as follows:

- The turnover/floorspace efficiency rate has been applied at a conservative level (0.5%). This is our view in terms of market conditions at present. However, over time, town centre retailers may do better than this on a yearly basis and this would reduce available capacity.
- At present, the full effects of the Factory Outlet Centre have not been witnessed and understood in relation to town centre shopping patterns. Accordingly, this situation should be monitored to understand whether trading fortunes are improving or otherwise. This could also reduce the capacity potential.

5.94 Consequently, whilst this capacity estimate reasonably reflects the future potential for the town centre, due to the complex trading conditions associated with retail facilities in and around Braintree, it is considered that caution should be applied when considering the potential of Braintree to accommodate significantly more retail floorspace at present.

5.95 In addition to the town centre, clearly Braintree Retail Park is proving a popular attraction for local shoppers. Table 8 confirms that we consider the capacity over a time associated with this facility is £1.5m (2001); £2.72m (2006) and £4.13m (2011). As a consequence, this capacity is also relevant to Braintree and having regard to the sequential approach. The first preference is to locate this within the town centre.

5.96 The trading conditions in Braintree are complicated by the Factory Outlet Centre. Whilst this facility has a turnover extending to £30.45 million at 2002, (source: Gerald Eve) much of the stores trade comes from beyond the 20 minute area. There remains, however, a significant proportion of trade drawn from the 0-20 minute area which appears from information supplied by Freeport Leisure to be

at the expense of trade normally flowing outside the area to Colchester and Chelmsford.

- 5.97 Indeed, it appears from information supplied by Freeport, that the centre has had a limited effect on trading circumstances in Braintree Town Centre (if not a benefit) and most trade has been drawn from other sources.
- 5.98 Clearly, if this is the case and anecdotal evidence suggest it might be, it would represent a significant benefit to the local trading situation, which means that Braintree retailing facilities as a whole retain significantly more of their trade than has previously been the case. In addition, there is also an in-flow of trade, to the Factory Outlet Centre, from outside the Braintree natural catchment area.
- 5.99 Whilst this should be considered to be a significant benefit, as Braintree Town Centre in its current form is not able to tap into these types of retail trips, it should also be borne in mind that any retail development coming forward in Braintree Town Centre which seeks to enhance the market share of the town centre within its hinterland, may find this difficult because other Braintree retail facilities already capture this expenditure.
- 5.100 In conclusion, it is considered that the prospect of future retailing facilities in Braintree should be considered carefully and with caution, whilst the town and the town centre in particular is adjusting to recent retail developments. There will inevitably be a settling down period and the Council should continue to review the situation throughout the plan period.
- 5.101 Firstly, the town centre provision is estimated currently to have a turnover of £36.88. We consider that this will grow at an average rate over the plan period of 1-1.5%. Consequently, the turnover at 2006 would be £45.39 million and at 2011 £50.86 million.

- 5.102 The influence of Braintree Retail Park is confirmed in table 6. Finally, there is the Freeport Village Factory Outlet Centre which also draws trade from the Braintree area but also for significant areas beyond. The trading patterns associated with the Factory Outlet Centre were not the subject of the telephone survey, as this was undertaken before the FOC opened.
- 5.103 Consequently, we feel that a cautious approach should be adopted by Braintree District Council towards any further retail development for non-food goods. We do not consider that the Council should plan for further growth, but for a period of consolidation to understand the trading patterns of the Factory Outlet Centre over a longer period of time and to ensure that these are maintained as complementary to the town centre.
- 5.104 It is likely, that given retail trends on a national basis, that Braintree Town Centre will lose its market share relative to higher order town centres elsewhere such as Colchester and Chelmsford. This should not represent a major concern to the Council, as this is a national trend and we fully expect Braintree Town Centre to maintain its role and function over the plan period.

### **SWOT Analysis**

- 5.105 Braintree Town Centre exhibits a number of strengths, weaknesses, opportunities and threats, which can be defined and addressed as part of this analysis. This list will not be exhaustive and should not be considered as defining the centre, however, they reflect important contributors to the future prospects of the town centre.

Strengths

- 5.106 Braintree is a major district centre with the potential to have an influence over a significant hinterland. It offers a range of services, associated with a centre of that status and has the ability to generate significant linked trips associated with a visit to the centre.
- 5.107 It is a centre of good environmental quality with an attractive townscape and a relatively modern retail mall, accommodating a good level of well known national multiple retailers.
- 5.108 The centre has a strong convenience retailing element, which underpins the overall retailing of the centre, by drawing people to the town centre to undertake food trips with the prospect of a significant number of linked trips associated with such journeys.
- 5.109 The centre is a focus for activity and for transport usage. The bus station and train station serve the town centre and there are ample car parking spaces available to town centre users.
- 5.110 The centre benefits from a number of community facilities, including a new town centre library, housed in a quality contemporary designed building.
- 5.111 The centre also benefits from two department stores in the form of Townrows and the Co-op department store, supported by a number of key stores including Boots the Chemist, Woolworths, Tesco's and Sainsbury's.
- 5.112 Towards the edge of town, is Freeport Village FOC, which draws trade from a wide area and has a designated link to the centre.

Weaknesses

- 5.113 Braintree is very reliant on convenience retailing to support the overall function of the town centre. The J. Sainsbury and the Tesco food stores in Market Place are both well used and anchor this part of the town centre. In addition, there is a Somerfield supermarket and an Iceland which are located to the western end of George Yard. Whilst these are positive considerations, it is also a concern that the centre is reliant to a significant degree on the profile of these retailers to encourage shoppers into the centre.
- 5.114 Other key retailers such as Argos, are perceived to be detached from the principal retailing areas and as a consequence do not perform an appropriate anchor role.
- 5.115 Indeed, the development of the George Yard scheme has brought about a welcome enhancement in retailing facilities in Braintree Town Centre but it has also detracted from north Bank Street and the High Street area which was previously the principal shopping location. As a consequence, this part of the town centre no longer accommodates any national multiple retailers and the retailing drops off quite quickly in the High Street, after Townrows Department store.
- 5.116 Additionally, Braintree town centre lacks quality higher price fashion retailing, trade which is largely lost to higher order centres nearby such as Chelmsford, Colchester although the town's limited provision is made up for by the outlet village. The town centre also lacks quality café and restaurant facilities which can add vitality and viability to an area such as Café Rouge, Café Uno, Pizza Express etc. These link with the entertainment offer of the centre which is also limited.

- 5.117 Overall, the centre has a number of routes and alleyways between shopping locations which dilute pedestrian movement and reduce the cohesion within the centre. For instance, as a pedestrian, to travel from Bank Street to Tesco, a number of different routes could be taken, either via Great Square and Market Place, or, Swanside, Little Square, Leather Lane and Market Place, or, Swanside, Drury Lane, Market Place, or, New Street/Market Street. Whilst these routes do add charm to the centre, the dispersed pattern of pedestrian movement does little to strengthen retail locations.
- 5.118 A particular weakness in the centre appears to be in the New Street/Market Street location, where limited pedestrian movement has been witnessed, largely due to the arcade being a distraction to the main retail pitch. The configuration of the arcade, smaller units and a blank frontage to the Tesco supermarket all detract from the retailing environment in this location.
- 5.119 Another more general economic weakness for the centre, reflects UK retailing trends, which is a move by the principal retailers away from locating in smaller centres, with a greater concentration on the larger centres, where they consider that they will be able to enhance market share to a greater extent.

### Opportunities

- 5.120 The future of Braintree town centre must be considered against the background of a generally static retailing picture in the town centre over the past five years. Whilst general levels of activity within the centre appear to have increased over the last 2-3 years, this has not been reflected to any significant degree in the indicators of vitality and viability that govern the health of a town centre. As a consequence, the opportunities for a centre of this nature need to be assessed against either the intrinsic qualities of the centre and/or new considerations which may have the potential to change the profile of the centre.

- 5.121 In terms of the intrinsic qualities of Braintree, it is clear that the centre has the potential to have a significant influence over the surrounding hinterland, and the centre has a status associated with being the principal town within the district. This means that there are a number of civic uses within the centre, together with several community uses. The key consideration for the town centre is to ensure that these uses and services work in parallel with the retail function of the centre, to the benefit of each other. Important to this, is an overall town centre strategy, where individual stakeholders within the town centre are able to define their requirements and aspirations for the town centre and these are co-ordinated for the greater good.
- 5.122 At present, it is considered that there is an opportunity to significantly enhance the inter-relationship between different uses in the town, to work these into a strategy with a common aim, which is then appropriately targeted.
- 5.123 The potential for Braintree town centre to attract cafes, restaurants and other A3 operators should be explored. This should not necessarily be at the expense of key retail units but rather to help support the overall retail function of the centre. A number of café concepts are rolling out development programmes across the UK, initially concentrating on the larger centres. As concepts prove successful the catchment reduces as risk is less of an issue for the operators, and brand association heightens.
- 5.124 Generally such operators look for parts of centres with vibrance and good environment and good environmental quality. Different brands have different requirements, but many are more flexible about refurbishment than retail operators.

- 5.125 The Council should consider which parts of the centre might be appropriate for such uses, potentially Market Square, and concentrate environmental improvements in this area. At the same time, the Council could profile the centre, identify potential units and approach often helps to build a relationship with operators which may also address other concerns which they may have such as licensing and listing/conservation area issues.
- 5.126 The other key change for Braintree over the last 2-3 years has been the development of the Chapel Hill area, in the form of a factory outlet centre and associated East Braintree Link Road. This has been referred to earlier in this report, as has the care with which the Council considered the application and determined it in a way which would complement the town centre. Whilst it is too early to provide a view on the benefits that may accrue to the town centre from this development, the early signs are promising, that there is a positive linkage between the two locations. This represents a significant opportunity for Braintree Town Centre.
- 5.127 The factory outlet centre has given the town a profile and status within the region which it previously lacked. Visitors to the factory outlet centre are generally on a “day out” and there is the potential to draw some of these visitors into the town centre. This is paramount if the town centre is to benefit from the profile associated with the factory outlet centre and its wide trade draw pattern.
- 5.128 There is a shuttle bus between the factory outlet centre and the town centre, and the usage of this should be monitored regularly. In addition, information on the town centre must be made available to factory outlet centre visitors.
- 5.129 Information points at appropriate locations within the centre should give guidance to visitors as to the attractions within the town centre. Consideration should be given to the best way of presenting this information.

- 5.130 The way in which Braintree town centre promotes itself, both within and outside the region should be given careful consideration. Town centre promotion will be a key consideration for visitors from beyond the area, and should be considered as part of a partnership strategy from key town centre stake holders.

### Threats

- 5.131 Braintree town centre faces threats from a number of external sources.
- 5.132 The higher order centres such as Chelmsford and Colchester, will continue to enhance their retailing attractions, relative to Braintree Town Centre. As a consequence, residents wishing to undertake significant fashion shopping trips, for instance, will be drawn to these centres rather than Braintree town centre.
- 5.133 In addition, other smaller centres within the region whose residents may previously have turned to Braintree Town Centre for some of their shopping trips, are now more self sufficient, due to relatively recent retail additions such as the Tesco at Great Dunmow and the Grove Centre development at Witham.
- 5.134 As a consequence, the market share of Braintree is likely to reduce naturally and the attraction of centres elsewhere will increase disproportionately.
- 5.135 It is important if Braintree is to maintain its current role and function, for the centre to continue to offer a wide range of goods and services within the town centre with as broad an appeal as possible.
- 5.136 Equally, whilst the opening of the factory outlet centre has been identified as an opportunity for Braintree Town Centre, it also poses a potential threat. Firstly if the town centre does not take the opportunity to embrace the opportunity and

secondly, if there is complacency, at any level, about the complementarity of the two shopping facilities.

- 5.137 There are two other immediate concerns for the town centre which pose a threat to future vitality and viability. The first is the development of the Marks Farm site for a food store of 1,858 sq m net.
- 5.138 This food store gives Tesco a strong representation in the Braintree area, where convenience retailing is already at a relatively high level. A further food store in this location would draw its trade principally from the same catchment area as existing retail facilities in the town centre some of which are trading significantly better than others. At present, it is considered that the Somerfield store in the town centre, which was previously a Kwik Save store, is trading relatively poorly and could be vulnerable to trade loss.
- 5.139 Elsewhere within the area, it is considered that only the Tesco town centre store is trading at a level above company average. Whilst other stores are trading at lower levels, they seem to operate well and it is not considered that at present these stores are vulnerable.
- 5.140 Notwithstanding this, the implementation of the Marks Farm planning permission will re-adjust trading levels in convenience goods throughout the centre and the situation will need to be monitored closely over the coming years. It is likely that this store will draw trade from each of the town centre stores, although principally the Tesco food store.
- 5.141 The importance of convenience retailing within the town centre has been stressed earlier in this report, and the development of the Marks Farm store is a threat that will need to be monitored.

- 5.142 Both the J. Sainsbury and the Tesco in the town centre have recently extended/refurbished which gives greater confidence in the ability of these stores to withstand competition from sites outside Braintree Town Centre.
- 5.143 The second threat relates to the increasing numbers of non-A1 units within the town centre. Whilst this has not yet reached a level which would be unacceptable in its own right, sufficient to undermine the vitality and viability of the town centre as a whole, there are a significant number of A2 units in particular which are beginning to proliferate throughout the centre. The concern is in relation to the location of these units, particularly where these are in key locations or where there is a concentration of such units.
- 5.144 In particular, the east side of Bank Street, to the north of Swan Side, has a run of six units, with only one charity shop breaking the concentration of non-retail uses. The west side of Bank Street is also threatened, to the north of the Woolworth's store, where of six units, three are currently in non-retail use.
- 5.145 The threat that this poses, is that if further non-retail uses locate on the west side of Bank Street, this could reduce shopper movement in a north-south direction, further isolating the Argos unit from the main retail pitch. It is considered that this would be harmful to the town centre.
- 5.146 In addition, there are a number of non-retail uses in other key locations, including the HSBC Bank at 3 Great Square, the Halifax Bank at 8 Great Square and a concentration of 3 non-retail uses at 47-55 High Street (Natwest Bank, Woolwich Bank and Roland James Estate Agents). As mentioned previously in this report, this part of High Street is considered to be more vulnerable now that the George Yard scheme has been implemented.

5.147 Whilst non-retail uses have the ability to add vitality and viability to a town centre and represent key services which are used by all members of the public, it would not be appropriate to allow these units to proliferate at the expense of A1 operators.

### Comparable Centres

5.148 A number of centres have been identified as having a similar Experian Goad ranking to Braintree (355th). These include Wokingham (354), Bicester (353), Sudbury (352), Corby (359), Spalding (365).

5.149 To benchmark Braintree, we have assessed the individual centres against a number of indicators including:

- Department store offer;
- Key stores (C&A, BHS, Marks & Spencer, Boots, WH Smith, Woolworths, Tesco, Sainsburys, Safeway, Waitrose, Littlewoods);
- Number of national multiple retailers;
- Total outlets;
- Vacancies;
- Rental levels.

5.150 Table 5 provides a comparative analysis of these various indicators. It confirms that Braintree compares relatively well in relation to the other comparable centres, with two department stores, albeit that these are not full line department stores (Townrows and Co-op), together with a generally good level of key stores and more national multiple retailers than other centres.

TABLE 5: COMPARISON OF TOWN CENTRE INDICATORS

SELECTION	TOWN	RANKIN	RANKIN	TOTAL	DEPT	KEY	NMR	VACAN	COMP	CONV
			1996	OUTLET	STORE	STORES				
<b>REGIONAL</b>										
	Chelmsford	43	71	466	2	10	34	33	742,500	121,600
	Colchester	60	76	580	1	8	45	65	628,800	57,900
<b>CENTRES</b>	<b>BRAINTREE</b>	355	263	223	2	4	22	28	207,900	97,100
	Brentwood	197	217	236	0	5	18	27	262,500	107,600
	Clacton	334	312	243	0	6	12	15	236,300	58,900
	Epping	-	496	149	0	3	6	10	150,200	73,500
	<b>HALSTEAD</b>	-	591	134	1	2	6	20	108,200	58,500
	Loughton	288	406	168				10	175,500	55,300
	Rayleigh	407	468	158	0	4	8	11	153,700	84,200
	<b>WITHAM</b>	364	353	153		3	16	24	171,000	65,300
<b>OTHER</b>	Wokingham	354	374	175	0	5	10	17	147,200	44,400
<b>COMPARABLE</b>	Bicester	353	353	188	0	5	11	16	196,000	68,500
<b>UK CENTRES</b>	Sudbury	352	338	238	0	3	10	35	252,100	63,500
	Corby	359	251	159	0	5	17	34	179,800	61,100
	Chelmsley Wood	363		65	0	2	10	7	115,100	53,900

Source: Various – CACI, Goad, Proms, Focus Report, Healey & Baker

5.151 This analysis confirms that Braintree is operating relatively well at present, against other comparable UK centres, although it is clearly losing ground to larger centres elsewhere which is in accordance with the retail trends outlined earlier in this report. This analysis must be considered in the context of qualitative considerations, having regard to the type of department store, and the range of goods that the key stores and national multiple retailers are able to offer within the centre, having regard to unit size and configuration.

5.152 Table 6 below also looks at rental growth over the period 1990-1999 in a selected number of centres. This confirms that for the principal centres, Chelmsford and Colchester, rental growth has been significant during the ten year period whilst for the lower order centres, without exception rental levels have reduced or stayed static.

**Table 6: Comparable Centres – Rental Levels**

TOWN	RENTAL LEVELS ZONE A			
	1990	1995	1999	Rental Growth %
Chelmsford	122.94	103.53	165.00	34
Colchester	110.00	110.00	155.00	40
Braintree	51.43	45.00	45.00	-13
Brentwood	78.13	62.50	62.50	-21
Halstead	18.00	18.00	18.00	0
Loughton	51.43	45.00	45.00	-13
Witham	30.00	30.00	27.00	-10
Wokingham	48.00	-	40.00 (1997)	-17
Bicester	48.21	46.93	45.00	-7

Source: Healey & Baker

5.153 This is a reflection of the UK retailing scene generally, as discussed above, which has witnessed growth in the larger centres, where retailers seek to secure greater market share and the benefit of collective trading draw is greater. It also reflects higher levels of vacancies in prime areas in the smaller centres, and limited retail demand.

### Strategy

5.154 A strategy for Braintree Town Centre must remain fluid, given the changing circumstances that Braintree as a whole is currently witnessing.

5.155 The strategy must build upon the strength and the opportunities currently exhibited by the centre, address weaknesses as far as possible and nullify threats.

5.156 It is considered that the strategy should form a number of strands:

*(i) Town Centre Partnership*

The town centre strategy group which exists at present should be extended to form an effective Town Centre Partnership, made up of representatives of all key stakeholders. This should include retailers, service providers, operators of community facilities, business people, the District Council and other statutory authorities. This Town Centre Partnership would be the vehicle for bringing forward a marketing strategy for the town centre to identify and implement focused improvements. The Partnership's role should be to add profile to Braintree Town Centre, to promote it accordingly and to share the skills of the partnership to secure a coherent town centre strategy. The marketing and promotion of the centre are key factors and the Partnership should concentrate on delivery mechanisms for the identified strategy. One issue in particular should be the attraction of cafes/restaurants.

*(ii) Town Centre Manager*

We consider that Braintree would benefit significantly from the presence of a town centre manager, potentially shared with other centres in the District. Such an individual would need to secure an affiliation to the Association of Town Centre Management (ATCM) and would be responsible to the District Council and/or a Town Centre Partnership. Responsibilities would include promoting the town centre within the region, identifying strategies, securing funding and bringing together all those with a stake in the town centre.

*(iii) Concentrate on the Factory Outlet Centre Links*

It is clear that the Factory Outlet Centre represents a significant generator of shopping visits to a location in close proximity to Braintree Town Centre. There are mechanisms in place, secured by the District Council through the planning process, to encourage visitors to the FOC to visit the town centre. These should be strengthened and every opportunity should be taken to strengthen this linkage and to ensure that information is provided both at the FOC and in the town centre on the services offered within the town centre. This might include information boards, further affective signing, from the point of drop-off, pick-up, map information etc. The opportunity should be taken to enhance the profile of Braintree's recreational destinations such as the two museums, library, George Yard, churches etc.

*(iv) Retail Frontage Policies*

The opportunity might now be taken through the local plan review, to introduce policies to protect retail frontages from non-A1 uses. This may require the definition of primary and secondary frontages, which should relate to existing core retail locations and more peripheral locations. Within these areas, differing degrees of protection might exist for A1 users.

*(v) Resist further out of centre food store development*

It is considered that Braintree as a whole has already maximised its potential for accommodating convenience food retailing at 2000 and this is unlikely to change at 2006 and not appreciably by 2011. As a consequence, and having regard to PPG6 paragraph 1.10, it is not

considered that it would be appropriate to identify a site for food store development over the plan period. However, changes may take place as a result of the implementation of a Tesco food store at Marks Farm and retail policies will need to be included within the plan, to address the prospect of food store development and the issue of need.

*(vi) Comparison Goods*

It is considered that Braintree Town Centre's market share is likely to decrease over the plan period, in line with national trends towards the location of retail development. This is not to say that existing retailers will not continue to trade profitably, but that Braintree will take a proportionally lesser share of the overall available retail expenditure within the area as this rises over time. Set against this, however, is the retail expenditure within the catchment area which is captured by the factory outlet centre. This will retain further trade in the catchment area, essentially broadening the appeal and enhancing the market share of Braintree as a whole. As a consequence, it is considered that there will only be limited opportunity for further growth within the centre, nonetheless the prospect of further comparison retail development within Braintree town centre should be encouraged.

*(vii) Environmental Improvements*

Opportunities should be taken to implement a programme of environmental improvements throughout the town centre.

*(viii) Opportunity Site*

Whilst only limited retail development is expected in Braintree over the plan period, the lack of pedestrian movement, poor environmental quality and level of vacancies makes the New Street/Market Street site into an opportunity site in the medium to long-term. Whilst uses may include some retail, this may not be a requirement.

*(ix) Market Square – Café Culture*

Consider the prospect of concentrating certain environmental improvements in the Market Square area, particularly in terms of public realm improvements. By enhancing this square and ensuring its vibrancy this could help to attract the catering operators which would help to address this specific target.

## **6. WITHAM TOWN CENTRE**

### **Health Check**

- 6.1 This health check section comments upon the current status of Witham Town Centre in 2000. The analysis is based upon the vitality and viability indicators set out in PPG6 and augmented by additional indicators considered appropriate such as multiple retailer representation and trader intentions.

### Structure of Town Centre & Development Activity

- 6.2 Historically Witham Town Centre was based upon a linear arrangement, with Newland Street being the principal shopping location.
- 6.3 Initially, this was augmented by the development of the Newland shopping precinct in the 1960's, which is anchored by an Iceland store and benefits from 205 public car parking spaces.
- 6.4 More recently, the Grove Centre has been developed, anchored by a Tesco supermarket and a Woolworths store, and benefiting from 369 car parking spaces.
- 6.5 These two shopping centres, have changed the focus of the town centre as a whole, from a south-west north-east axis to a north-west south-east axis.
- 6.6 The principal retailers within the centre are contained within the two shopping precincts, with the Grove Centre clearly being the principal shopping location in Witham Town Centre. The Newland shopping precinct now looks relatively dated, although discussions have been progressed with a discount retailer to take space in this location, which would support the precinct and enhance its vitality.

- 6.7 Elsewhere within the centre, there are a number of important stores including the Co-op Homemaker department store and Byfords furniture and household goods.
- 6.8 In general terms, the retail function of Newland Street is diluted by a number of non-retail uses including banks, solicitors, surgeries and public houses, and while these add character to the centre, they do dilute the retail function of this part of the centre.
- 6.9 There is also significant on-street car parking in Newland Street.

#### Retailer Representation

- 6.10 Witham has a total of 153 retail outlets within the town centre. There is one department store, the Co-op Homemaker, although this does not anchor the town centre to any significant degree. In addition to this, the three 'key' stores within the centre are Tesco, Woolworths and Boots The Chemist and these are supported by a further 13 national multiple retailers, principally, although not exclusively within the two shopping centres. There remain a significant proportion of independent retailers. Table 7 confirms this position.

**Table 7: Current Retail Provision**

<b>USE</b>	<b>1999</b>
Convenience (Supermarkets)	2
Convenience (Other)	2
Class A1 Fashion (NMR <sup>1</sup> )	8
Class A1 Other (NMR)	9
Class A1 Independent	36
Class A1 Service	28
Class A2 Financial and Professional	20
Class A3 Pubs	8
Class A3 Restaurants/Take-aways	15
Charity Shops	5
Vacant	21
<b>Total:</b>	<b>154</b>

<sup>1</sup> NMR – National Multiple Retailer

6.11 In terms of retailer views, whilst only a limited response was received from those retailers represented in Witham, Boots the Chemist confirmed that they were trading below average, Superdrug at average and Woolworths confirmed that they were over-trading and seeking additional floorspace.

6.12 Beyond this comment from Woolworths, we are aware of limited further retailer demand for floorspace from Marie Curie Cancer Care and McDonalds.

#### Diversity of Uses

6.13 Witham is a smaller district centre than Braintree serving the convenience needs of local residents and to a limited extent comparison needs. The centre also provides a number of services to local residents including banks, building societies, other professional services and recreation, leisure.

- 6.14 The centre does have a significant office population, additionally there are a number of former residential properties or high street properties which have been converted for office purposes.
- 6.15 The opportunities for linked trips within the centre do exist, although not to the same extent as Braintree or higher order centres elsewhere. Whilst residential development does ring the town centre there are only scattered residential properties actually within the centre itself.
- 6.16 Witham also benefits from a weekly market on Saturdays in Collingwood Road which brings an added attraction to the area.

#### Shopping Rents

- 6.17 Rental levels in Witham are currently in the region of £27 for Zone A which is a reduction from the 1990/95 level of £30. The rental level reflects retailer demand and the level of vacant units in the centre.

#### Vacancy Levels

- 6.18 The vacancy level in Witham Town Centre currently stands at 16% with 24 of 153 units vacant. This figure could reduce, if a discount retailer takes space, in the Newland shopping precinct.
- 6.19 Vacancies are spread throughout the centre, although the Grove Centre currently bears witness to three vacant units with the Newland Shopping Precinct having four vacant units (subject to any change associated with the a discount retailer proposal).

- 6.20 Whilst this vacancy level is above the national average level, it does not at present undermine the vitality and viability of the town centre as a whole, although it will need to be monitored closely over the coming years.

#### Yields

- 6.21 Witham has been the subject of relatively few retail property transactions in recent years, none of which would be sufficient to demonstrate a constant yield forecast.

#### Pedestrian Flows

- 6.22 Pedestrian movement in the centre is based principally on the north-west south-east axis, with movement between the Grove Centre car park, through the Grove Centre, crossing Newland Street and into the Newland Shopping Precinct. Pedestrian movement elsewhere within the centre is from observation more modest, even though there are a number of important retailers to the South along Newland Street. This may reflect the extended circuit that would be required to cross the road, to the south of King Chase which extends the perception of the retail circuit within the centre and detracts from its usage.

- 6.23 On Tuesday 19 and Friday 22 October 1999 Braintree District Council undertook pedestrian flow counts within the centre (**Appendix 3**). This confirmed the following:

- The relatively greater attraction of the Newlands Precinct than other parts of the town centre;
- The appreciable increase in pedestrian movement over the lunchtime period; and
- The significantly greater pedestrian movement on a Friday.

### Accessibility

- 6.24 Witham Town Centre is relatively accessible by car and by bus, although the train station is approximately 1km from the town centre.
- 6.25 Car parking is principally located in association with the Newland Shopping Precinct and the Grove Centre, the latter of which is not easy to find for people visiting the town centre for the first time. There is also a significant amount of on-street parking.
- 6.26 The pedestrian environment through the Grove Centre is good and the crossing opportunities for Newland Street are equally good, using the green phasing of the traffic lights. Newland Shopping Precinct is less attractive although pedestrian flows indicate this is the busier of the two centres.

### **Customer Views**

- 6.27 Over 36% of respondents to the shopping survey confirmed that they most liked Witham because of its proximity to home, with 17.6% of respondents stating that there was very little to like about the local centre. 7% consider that it was a pleasant environment, 6% that it was friendly and 9% that it was peaceful.
- 6.28 25.5% consider that the range of goods was a matter to dislike and nearly 16% consider that the environment was poor.

### **Perception of Safety & Occurrence of Crime**

- 6.29 None of the shopper survey information gave any suggestion that Witham was an unsafe place to visit nor that crime was a real issue.

### **State of the Town Centre Environmental Quality**

- 6.30 Witham is an historic centre, with a number of historic buildings. The environmental quality of the townscape is high and this is complemented by the Grove Centre.
- 6.31 The environmental quality of the Newland Shopping Precinct is significantly less attractive, being of 1960's design.
- 6.32 The significant amount of vehicle traffic along Newland Street, does impinge upon the environmental condition of the centre, although it does add to the vitality and convenience of the centre.

### **Capacity Analysis**

#### Food Retailing

- 6.33 A capacity assessment has been undertaken in relation to food retailing for Witham.
- 6.34 In the first instance, it should be noted that the catchment area for Witham indicates that its primary catchment ie. more than 50% of the postal sector expenditure goes to Witham stores, covers the Witham urban area and immediate surroundings. Its secondary catchment is covered by the postal sectors immediately to the west and east (CM32 and CO59).
- 6.35 Beyond that the area of influence extends towards and includes Braintree and somewhat anomalously an independent postal sector to the north (CO94). This is most likely explained by a travel to work pattern.

- 6.36 While Witham benefits already from a Tesco foodstore and an Iceland store within the town centre and an out of centre Safeway, the market penetration within its primary catchment is 77%, together with its limited influence beyond this area suggests that the foodstore provision in the centre could be improved. In coming to this conclusion, account has been taken of the commitment for convenience retailing as part of the Maltings Lane Development of 1,115 sq.m.
- 6.37 Natural capacity associated with the catchment area ie. maintaining market share over the local plan period would result in little room for growth in convenience retailing. However, an enhanced market penetration and a widening of the catchment area could well demonstrate the appropriateness of further food retailing in Witham Town Centre.
- 6.38 There are two areas where food retailing may be enhanced within the town centre. Firstly, the prospect of a discount retailer as part of the Newland Shopping Precinct, which would represent a qualitative enhancement in purpose built retailing in Witham, catering for requirement of local residents, and, secondly, the prospect of an extension to the Tesco store in The Grove Centre. Whilst this still appears to trade well, it does so with a limited range of goods and it is clear that the prospect of a broader range and number of lines in this store could enhance its catchment and consequently that of the town centre.
- 6.39 Both of these options would offer the opportunity of enhancing the catchment of Witham Town Centre and broadening its market share within its existing catchment. If neither of these opportunities were secured, Witham would still benefit from good overall retail provision.

Comparison Retailing

- 6.40 **Appendix 2**, confirms that the influence of Witham over its surrounding catchment area is relatively significant and extends some way to the west of the town and indeed, of Braintree. Its primary catchment remains, however, the Witham Urban Area and its environs.
- 6.41 The constraints on Witham's trade to the south are obvious in the form of Colchester and Chelmsford.
- 6.42 This is to a large extent reflected in Witham's retention level within the primary area which at 1999 stood at 15%. This is particularly poor but reflects the difficult trading circumstances experienced by the town. The difficulties are most appreciable within the clothing and footwear sector which retains only 9% of its expenditure. Most local residents choose to shop in Chelmsford (CM81 – 68%, CM82 – 66% and CM83 – 74%). Electricals generally perform better at 20% with DIY at 44%.
- 6.43 Capacity over the local plan period is limited. At 2001 it extends to 699 sq.m gross, 2006 to 1,533 sq.m gross and at 2011 to 2,432 sq.m gross.
- 6.44 Whilst the low market share indicates the potential for this capacity to be increased, if an appropriate development came forward, given the limited retailer requirements identified for Witham at the present time and retailing trends on a national basis, we do not consider that it would be appropriate for Witham to plan for development to increase its market share over the plan period. Indeed, given the limited demand, we would anticipate that Witham Town Centre could well witness a reduction in market share over the plan period, particularly given its proximity to higher order centres such as Colchester and Chelmsford.

- 6.45 As a consequence, we consider it likely that Witham will witness incremental growth over the local plan period and this is likely to be within its natural capacity. As identified above if opportunities do come forward to halt the outflow of trade, these should be explored positively, subject to usual planning considerations.

### **Swot Analysis**

#### Strengths

- 6.46 Witham is a relatively well used shopping centre, which appeals to the diverse local population. It has a relatively good balance of convenience and comparison retailing for a centre of that scale and a number of important key retailers, supported by national multiple retailers.
- 6.47 The centre exhibits good environmental quality, on the whole, and ample levels of car parking.
- 6.48 There are a significant element of service uses complementing the retail function of the centre and adding to the prospect of linked trips.
- 6.49 The existing market stall in the Grove Centre has character and vitality and should be welcomed.
- 6.50 Additionally, the significant local office population are important to maintaining vitality and viability locally.

Weaknesses

- 6.51 In relation to weaknesses, this largely relates to the higher level of vacancies within the centre and the extended retail spread of the centre along Newland Street, which is diluted by non-retail uses. Fashion retailing is relatively poor and the Newland Shopping Precinct needs improvement.
- 6.52 There remains a lack of high quality themed pub and restaurant facilities within Witham and hence opportunities for an evening out.
- 6.53 Fashion retailing is clearly an area where Witham under performs relative to its competition and it does little better in terms of electrical retailing. These are major concerns for the centre.

Opportunities

- 6.54 Opportunities do exist to build upon Witham's retailing core, and a new discount retailer would bring about an enhancement to the convenience facilities within the centre further strengthening the overall shopping trip.
- 6.55 Opportunities to focus and consolidate retailing within Witham, by creating a more confined retail circuit, may be appropriate. In this respect, the prospect of moving the pedestrian crossing at Newland Street further to the north-east, past the United Reform Church. This would reduce the retail circuit, and has the potential to result in greater usage of existing retail usage in Newland Street.
- 6.56 The opportunity could be taken to approach Woolworths about introducing a window frontage into the Grove Centre façade and to explore opportunities to help Woolworths extend this store.

- 6.57 Consideration may be given to encouraging further market stalls within the Grove Centre area and extending this to Newland Shopping Precinct if space became available.
- 6.58 The prospect of an extension to the Tesco store should be explored as this represents the key town centre anchor retailer at present.

### Threats

- 6.59 There are two principal threats to the continuing role and function of Witham Town Centre. Firstly is the reduction of influence of the centre within its defined catchment area. It is likely that Witham will naturally reduce its market share relative to higher order centres elsewhere. At present, we have not identified any meaningful retailer demand which would suggest that further development in the town would be a viable proposition. Notwithstanding this, if it could be achieved on a town centre site, the prospect of maintaining current levels of market share for the town centre should be encouraged.
- 6.60 The second consideration, relates to the proliferation of non-retail uses within the town centre and whilst they appear to perform an important function in Newland Street, it would be inappropriate if they were to predominate in the core area of the town, which is essentially north of Guithavon Street and south of Collingwood Road, on both sides of the road.
- 6.61 Whilst the Grove Centre is a welcome addition to retailing within Witham the long blank return frontage to the Woolworths unit along side the blank frontage to the White Hart Public House, is not a particularly welcoming entrance way.

## **Strategy**

6.62 The strategy for Witham should be relatively fluid, and able to respond to prevailing circumstances throughout the local plan period. The changing retailing associated with the introduction of a discount store would need to be monitored closely.

6.63 Accordingly, it is commended that a strategy should be as follows:

*(i) Consolidation*

To focus on the existing retailers within Witham Town Centre rather than to seek further developments. If new development opportunities are apparent within the town centre, these should generally be welcomed.

*(ii) Convenience Retailing*

It is not considered that significant qualitative need exists for further food retailing within Witham Town Centre. Witham as a whole benefits from an existing Sainsbury food store on the edge of the town centre, a major Tesco supermarket, anchoring the Grove Centre which is generally busy and an Iceland frozen food store. In addition, a discount retailer is currently considering opportunities in the Newland shopping precinct which would perform an important function for the centre as a whole. Potential may also exist for an extension to the Tesco store which may be appropriate in principle subject to scale. At this stage, it is not considered appropriate to allocate any further sites for retail development. Local plan policy should be predicated on the basis that further convenience retailing would need to be justified having regard to the need for further facilities, unless they are located within the town centre.

*(iii) Town Centre Management*

Consideration should be given to the prospect of a town centre management initiative and town centre partnership, to draw together the key stakeholders within the town centre, to define common goals and to promote the town centre accordingly. A key consideration for this Town Centre Partnership should be the promotion of the town centre generally and how to engage the business community to establish how this could further benefit the town centre.

In this sense the presence of a Town Centre Manager could be of significant benefit overall. It is doubtful whether Witham would be of a scale to warrant a full-time manager but the potential of a part-time town centre manager or one shared with another centre may prove appropriate.

*(iv) Market Stalls*

Market stalls of a high quality and limited in number can add vitality to a location. Consideration should be given to encouraging a location within the centre, on specified sites, where this would not detract from retailing elsewhere within the centre. It is acknowledged that the Grove Centre already performs this function to a limited extent although an approach for the future needs to be considered.

*(v) Woolworths*

Discussions should commence with Woolworths to establish their requirements for further space within the centre, and the opportunity for a window frontage along the return frontage to the Grove Centre.

*(vi) Pedestrian Circuit*

The prospect of moving the pedestrian crossing at the south end of Newland Street (to the south of King Chase) should be considered to a position to the north of the United Reform Church. This could have benefits in terms of reducing the retail circuit and enhancing pedestrian movement in this part of Newland Street.

## 7. HALSTEAD TOWN CENTRE

### **Town Centre Health Check**

7.1 The health of Halstead Town Centre has been considered under a number of headings.

#### Structure of Town Centre

7.2 Halstead is essentially a linear town centre based on Trinity Street, Bridge Street and High Street. High Street is the core of retail activity and runs up the hill to St. Andrews Church.

7.3 The centre generally exhibits an historic environment in the High Street/Market Hill area, with more recent additions in Bridge Street and Weavers Court.

#### Retailer Representation

7.4 The principal retailers in Halstead are the Somerfield supermarket on High Street and the Solar Co-op supermarket which anchors Weavers Court. In addition, there are a number of key stores including Boots the Chemist and Woolworths, supported by a limited number of national multiple retailers including Stead and Stimpson and Clinton Cards. The centre has a number of antique shops.

7.5 Table 7 below represents an analysis of the 1999 Goad plan for the town centre.

**Table 7: Retail Provision**

<b>USE</b>	<b>1999</b>
Convenience (Supermarkets)	2
Convenience (Other)	7
Class A1 Fashion (NMR <sup>1</sup> )	2
Class A1 Other (NMR)	3
Class A1 Independent	39
Class A1 Service	19
Class A2 Financial and Professional	14
Class A3 Pubs	5
Class A3 Restaurants/Take-aways	9
Charity Shops	3
Vacant	19
<b>Total:</b>	<b>122</b>

<sup>1</sup> NMR – National Multiple Retailer

7.6 Independent retailers predominate within the centre, together with banks and building societies and retail service uses. In terms of the retailers that responded to the questionnaire, Aldi Stores have indicated that they might seek representation in Halstead, Boots consider that trading conditions are good and Woolworths are trading above average and may consider the prospect of further floorspace.

7.7 Further retailer demand has been identified from Iceland for a store between 6,000-7,500 sq ft and by Peacock's Stores Limited, for a store of minimum size 4,000 sq ft.

Diversity of Uses

- 7.8 Halstead is an historic market town where the principal function of the centre remains strongly retail. This function is supported by number of retail services and banks and building societies throughout the shopping area.
- 7.9 A twice weekly market on Fridays and Saturdays is held in the High Street, representing an important draw, particularly from the local catchment.
- 7.10 There is a significant emphasis upon St. Andrews Church as a focal point, with the church hall and church buildings running parallel to the High Street to the south-east.
- 7.11 The centre has a limited number of community uses including a post office and a library, but no civic responsibilities, although the District Council does have an area office and a tourist information centre is open during the summer months.
- 7.12 There are various residential units within and surrounding the centre. The River Colne is also an important recreational facility in this location.

Shopping Rents

- 7.13 Zone A rental level in Halstead have remained relatively static since 1990 at £18.
- 7.14 This is, amongst other things, a reflection of the number of vacancies within the centre and the limited retail demand for space.

### Vacancy Levels

- 7.15 Of the 122 retail units in Halstead, 19 are currently vacant (16%). This remains above the national average level (12.25%).
- 7.16 It is important to have consideration to the location of these vacant units which are generally dispersed throughout the centre, although there is a concentration in the Market Hill/Head Street area which diminishes the retail grain of this location. A long term vacancy in Bridge Street (No.36) which in many ways is a gateway to the town centre from the south has recently been taken up.
- 7.17 Vacancies within the prime retail areas are less discernible and overall whilst this vacancy level is high, it does not yet lead to concerns over the overall health of the town centre. Significant care needs to be taken, however, to ensure that vacancies do not predominate.

### Yields

- 7.18 Little investment activity has taken place within Halstead in recent years, sufficient to establish a reasonable yield for the centre as a whole and many properties are owned freehold. On this basis, there is no reliable yield information.

### Pedestrian Flows

- 7.19 Relatively strong pedestrian flows are witnessed in the lower part of the High Street, reflecting the car parking facilities in this area and the extent to which pedestrian movement is limited by the steepness of the hill on which the retailing is located.

- 7.20 It is apparent that Somerfield attracts a significant level of pedestrian movement, although beyond these areas, pedestrian flows are relatively limited.
- 7.21 The District Council undertook pedestrian flow counts throughout the centre on Thursday 21 October and Friday 22 October 1999 (**Appendix 2**).
- 7.22 Generally this confirmed the following:
- That flows at the bottom of the hill are significantly higher than towards the top;
  - That Weaver’s Court is a relatively more popular than the rest of the centre;
  - No appreciable uplift over the lunchtime period;
  - That Fridays (Market day) are significantly busier than non-market days; and
  - That pedestrian flows to the north of “The Centre” on the east side of High Street are generally low. Even on market day where the uplift elsewhere may be 50%, the uplift in this area is only 20%, and from a low base.

### Accessibility

- 7.23 Halstead is reasonably accessible by car and bus, with a number of bus stops throughout the centre.
- 7.24 Car parking within the centre is primarily to the south west, although parking does exist on-street, particularly towards the northern end of High Street (35 spaces). Generally, however, parking numbers are perceived to be limited, particularly by local traders.

Customer Views & Behaviour

7.25 Survey work indicated that the principal reason for residents using Halstead was its proximity to their home (21%) followed by it being a pleasant environment (16%) and that it was generally a friendly centre (12%). It is clear that Halstead's principal characteristics of being quiet and peaceful and a friendly and pleasant place to shop are considered highly by local residents.

Perception of Safety and Occurrence of Crime.

7.26 Halstead is generally perceived through the survey work to be a safe place to visit.

Environmental Quality

7.27 Halstead is an historic centre with a number of old and listed buildings. This characterises the townscape as does the incline associated with High Street. Together, these characterise the recreational function of Halstead which is important to the centre as a tourist attraction.

7.28 Environmental improvements are witnessed throughout the centre, particularly to the north towards Market Hill and opportunities have been taken, through signage, to link the town centre to the river.

Capacity Analysis

*Food Retailing*

7.29 Halstead town centre already benefits from a Co-op Solar foodstore and a Somerfield, both within the town centre. The pattern of food retailing that relates to this is defined on plan **Appendix 1**. This confirms that Halstead town centre

has a relatively limited food retail catchment, with its primary area covering CO91 and CO92. To the immediate western and eastern postal sectors trade is drawn towards Halstead but to a much less degree.

- 7.30 Within the primary catchment the retention level is 77% which is reasonably strong but could be enhanced. Additionally, however, it is considered that potential does exist to enhance the level of trade drawn to Halstead from some of the other postal sectors over which it currently has an influence. This trade is currently relatively 'footloose' as it is largely associated with large rural areas that may look to various towns to meet its requirements. At present, Sudbury and Braintree attract the majority of this footloose trade but this need not continue to be the case.
- 7.31 To a large extent this reflects the enhanced position in Braintree and Sudbury which draw people from the intermediate catchment area.
- 7.32 Natural capacity is limited and in relation to food retailing would see only a further £0.1m at 2006 and £0.3m at 2011.
- 7.33 However, the limited influence that Halstead town centre has over its catchment area suggests that there are qualitative deficiencies in food retailing within this area and the local plan could take the opportunity to remedy this.
- 7.34 We consider that only a relatively limited amount of further food retailing within Halstead would be required to enhance its catchment profile potentially significantly. We consider, therefore, that capacity may exist for a store of up to 1,000 sq.m net, although we consider that this need only exists within the town centre, creating collective trading draw with other town centre occupiers.

- 7.35 Opportunities should be taken to review the potential locations for a unit of this nature, together with the car parking that would be required to make it viable.
- 7.36 In this respect, it is noted that Iceland have indicated that they have a requirement for a store in Halstead of between 600-700 sq.m. We consider that this might be a complementary and appropriate store format.
- 7.37 Other opportunities may come forward over the plan period for further food retailing in Halstead although it is unlikely that this would prove to be additional provision to that which exists, although there may be the potential for it to be replacement provision.

#### *Non-Food Retailing*

- 7.38 The plan at **Appendix 1** identifies the current influence of Halstead's non-food retailing over the catchment area. It draws about 75% of its trade from its two core postal sectors with a further 20% coming from the west and east. While the centre's area of influence extends to the edge of both Sudbury and Braintree, the centre draws little expenditure from these more peripheral areas.
- 7.39 The key factor, however, is that Halstead secures only a 14% retention level within this primary catchment, reflecting the relative attractions of other centres but particularly Colchester for clothing and footwear. Whereas Halstead secures 8% and 14% of the clothing and footwear expenditure in postal sectors CO91 and CO92 respectively, Colchester secures 66% and 60% respectively. Interestingly, Braintree and Sudbury are less of an influence for comparison retailing.

- 7.40 Whilst Halstead appears to do well in retaining expenditure from the primary catchment relating to furniture and carpets (40%), it does less well with electricals (24%) and DIY (15%).
- 7.41 In terms of natural capacity, if Halstead maintained existing levels of market share it could support a further 412 sq.m gross at 2001, 905 sq.m gross at 2006 and 1,435 sq.m at 2011.
- 7.42 Given the vacancy rate within the town centre, the limited opportunities for development and the lack of significant demand, it seems unlikely that Halstead Town Centre will be able to maintain its market share over the plan period. It is more likely that if demand comes forward for specific retailers, that this could be met by an incremental take up of existing space. However, the historic nature of many of the units within the town centre may make this a difficult proposition, given modern retailer requirements.
- 7.43 Nonetheless, Halstead will need to work hard to maintain its current role as a district centre especially in light of the review at paragraphs 4.29-4.36. Whilst it is recommended that no major allocations are made to accommodate further floorspace, if appropriate sites can be found, the opportunity should be taken through development briefs, to indicate that purpose built retail units would be desirable.

## **Swot Analysis**

### Strengths

- 7.44 The strength of Halstead is clearly focused on its historic character and townscape quality. It is a centre which can be relatively busy particularly on market days and attracts a number of visitors. It has a perception as being a centre for antique shops with good catering outlets.

Weaknesses

- 7.45 In terms of weaknesses, there are a number of vacant units in key locations within Halstead, which detract from the overall appearance, particularly on Bridge Street and Market Hill. The Centre would benefit from more national multiple retailers. Unit sizes, however, do not fully reflect modern retailer ideal requirements. The local Business Rates are also perceived by local traders as a real threat, together with the lack of car parking.
- 7.46 However, in relation to car parking, this was not an issue identified in the shopper survey as being a reason for disliking the town centre.
- 7.47 Halstead also performs poorly relative to centres elsewhere and its comparison retention level is weak.

Opportunities

- 7.48 Opportunities within the centre are limited. The town centre is relatively constrained to its existing street pattern and historic form. Notwithstanding this, there is clearly an opportunity to build on the tourism potential of the centre.
- 7.49 In addition, it is considered that potential does exist for convenience retailing within Halstead, which would broaden the influence of the town centre within and beyond its catchment area. An appropriately located and complementary convenience retailing unit within the town centre could also help to perform an anchor role within the centre.

- 7.50 Demand for such uses within the centre exist Aldi has confirmed an interest in Halstead for a store of approximately 1,165 sq.m, and Iceland for a store up to 700 sq.m. However, it may be difficult to accommodate such a store within the confines of the town centre.

### Threats

- 7.51 Halstead is a small district centre with a relatively limited local catchment. Whilst it is considered to be a pleasant place to shop by local residents, it is clear that it cannot meet the full shopping requirement of the local catchment. On this basis, shoppers are likely to shop in higher order centres further afield such as Colchester, Braintree and Sudbury. It is likely that Halstead will lose market share, and the limited number of key and national multiple retailers that currently exist within the centre, are unlikely to prove a sufficient attraction, in themselves, to encourage significant numbers of shoppers to return to Halstead.
- 7.52 Halstead does not have the right space or catchment profile to attract major national retailers such as M&S, or at present WH Smith, and the limited operator demand would be most unlikely to justify development, unless for an end user. In this respect, the risks associated with low retailer demand and weak rental levels, would militate against development.
- 7.53 Accordingly, unless a specific end-user was identified it is unlikely that Halstead would experience development proposals in the foreseeable future.
- 7.54 The principal threat to Halstead is that it will lose influence over time, and will not provide a sufficient range of services to maintain its current role and function. There is a danger that Halstead will decrease its function to that of a local centre.

## **Strategy**

7.55 The strategy for Halstead is difficult to define. Due to its historic character, there are significant problems in securing new development which might maintain the role and function of the centre. Indeed, there is only limited retail demand for further space in Halstead, which may support a viable scheme. The centre must, therefore, largely concentrate on its existing retail structure.

7.56 As a consequence, it is considered that Halstead should be the focus for attention of a positive strategy, to ensure that the centre continues to maintain its role and function.

7.57 As a consequence, the following strategy is considered appropriate:

(i) *Historic/Tourist Core*

Emphasis should be placed on promoting Halstead as a centre for tourist activity, underpinned by the historic nature of the centre. This requires a co-ordinated strategy, linking retailing, recreational activities (the river) and other community focus points such as St. Andrews Church, together with the existing public houses and restaurants within the centre. Consideration should be given to building upon and promoting the role as a centre for antiques.

(ii) *Environmental Improvements*

Further environmental improvements could benefit the centre, particularly in the area of Weavers Court and Bridge Street. In addition, further seating areas at Market Hill, with the potential to extend the civic space in this area should be explored. These improvements should be co-

ordinated to reflect (i) above. Particular consideration should be given to the quieter area to the north of ‘The Centre’ on the east side of the High Street.

*(iii) Town Centre Partnership*

To engage a process of publicity and promotion for the centre, a Town Centre Partnership should emerge from the town strategy group, where the key stake holders are involved in guiding and forming a realistic strategy to support Halstead. The purpose of such a partnership would be to identify objectives, secure consensus, define strategy and seek delivery mechanisms/funding sources. Such a partnership should base its approach on the inherent strengths of Halstead and have greater regard to the commercial and conservation realities of major change.

*(iv) Town Centre Manager*

The prospect of a part-time or shared town centre manager should be considered to assist in securing a co-ordinated strategy for the centre. This sort of figurehead could help to sharpen the focus of the local strategy and to implement local initiatives with and across local business groups.

*(v) Food Store*

The prospect of further convenience floorspace in the centre should be considered. This is likely to be demand lead, and responding to available capacity. On this basis, it is considered that the most likely proposition would be a discount retailer such as Aldi or an Iceland store. The prospect of associated car parking playing a dual role serving the store and

the centre could also be a benefit in responding to the perceived lack of car parking spaces. Finding a suitable location may prove more problematic.

*(vi) Gateway Locations*

The Council should monitor closely the gateways to the town centre at Bridge Street and Head Street, to assess the contributions which these important locations make to the overall perception of the town centre. If vacancies become long term, the Council should consider the prospect of taking action to bring these locations back into meaningful use perhaps through change of use or encouraging short-term lets.

## **8. SUMMARY & CONCLUSIONS**

8.1 This report has been prepared by Healey & Baker on behalf of Braintree District Council to consider the current trading profile of the three principal centres in the district and their retailing potential over the plan period. This has been considered against the national economic outlook and identifiable retailing trends. These have confirmed a polarisation towards larger centres, where retailers can be confident about the right retail and leisure critical mass and greater collective draw. Demand for larger unit sizes is now common place and centres which do not have the opportunity for larger units or do not meet these expectations will suffer from a reduction in market share over time.

### **Braintree**

8.2 Braintree has seen much activity over the past ten years in terms of both convenience and comparison retailing, in the town centre and elsewhere, principally Chapel Hill.

8.3 In essence, the town centre is relatively healthy, supported by a strong foodstore presence. This is subject to competition from the new Tesco Store at Marks Farm.

8.4 At the same time, the Freeport Village development is now maturing as a shopping location and appears to have recaptured significant trade previously outflowing to higher order centres such as Colchester and Chelmsford. Planning permission has recently been granted to extend this facility by approximately 20%.

- 8.5 Initial evidence points to a complementarity with the town centre and a positive linkage which will need to be worked at over time. The town centre will need to be monitored for signs of diminishing trade – pedestrian flows, vacancies, anecdotal evidence – but at present appears to be adapting well.
- 8.6 The strategy for Braintree is to protect and promote the town centre with a programme of initiatives seeking to build on key opportunities.

### **Witham**

- 8.7 Witham is a centre dominated by Chelmsford and Colchester, which is reflected in its trading patterns, with the town centre retaining only a limited amount of expenditure within its immediate primary catchment area. The centre appears to trade well, however, with a significant amount of activity in particular associated with the Newlands Shopping Precinct and The Grove Precinct. Whilst the Newlands Centre is older and in need of refurbishment, there is the potential to attract a discount retailer to this location that would be likely to significantly benefit the town centre retailing offer as a whole.
- 8.8 The strategy for Witham is concentrated on focusing the retail area and for seeking opportunities to enhance the existing retail provision, primarily in terms of quality and presentation as well as seeking the effective promotion and marketing of the centre.

### **Halstead**

- 8.9 Halstead has historically been considered a centre of some strength, with its relatively affluent local catchment, quality environment and interesting independent shops. However, as retailing trends have moved rapidly over the last 10-15 years throughout the UK, Halstead has been left behind to a significant

extent, relative to its competition - Colchester, Braintree and Sudbury. The reasons for this relate to the conservation considerations associated with the centre which whilst protecting its charm act as a constraint in terms of new development potential and the limited number of good sized units available. In general, other centres have proved more attractive to retailers than Halstead.

- 8.10 This is reflected with the centre being able to retain only 14% of trade within its primary catchment area.
- 8.11 The strategy for Halstead is to create an effective promotion and marketing approach, to encourage shoppers and potential shoppers to visit the centre more often and to spend more time in the centre. The realistic approach to promoting Halstead is through the enhancement of the existing, with emphasis on environmental improvements and co-ordination between existing operators within the centre.
- 8.12 The prospect of a further complementary convenience retailer within the centre should be considered, if a site can be secured and the level of car parking can be created which will also help to support the centre.