Braintree District Retail and Leisure Evidence Study

Final Report 2024 - 23 September 2024

Braintree District Council

Adopted October 2024

LICHFIELDS

Braintree District Council

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Glossary

Benchmark turnover

Expected turnover of existing retail floorspace based on national averages which the identified available expenditure can be measured against.

Class A1

Commercial units/premises previously classed as retail or shop uses, but now part of the new Class E.

Class A2

Commercial units/premises previously classed as financial or professional services, e.g. banks and building societies, but now part of the new Class E.

Class A3

Commercial units/premises previously classed as restaurants and cafés, but now part of the new Class E.

Class A4

Commercial units/premises previously classed as public houses and bars, but now classed as Sui Generis.

Class A5

Commercial units/premises previously classed as hot food takeaway outlets but now classed as Sui Generis.

Class D2

Commercial units/premises previously classed as leisure, sport and recreation uses but now classed as Class E, Class F.1 or Sui Generis.

Class MA

A new class of permitted development rights allowing certain changes from business and commercial to residential.

Convenience goods

Consumer goods purchased on a regular basis e.g. food/groceries and cleaning materials.

Comparison goods

Durable goods such as clothing, household goods, furniture, DIY and electrical goods.

Experian

A data consultancy widely used for retail and leisure planning information.

Food and beverage

Classes A3 food and drink outlets, selling food and drinks consumed away from the home or hot food takeaway food but not food and grocery items including convenience goods.

GlobalData

A market research and data consultancy widely used for retail planning information, previously Verdict Research.

Goad Plans

Town centre plans prepared by Experian, which are based on occupier surveys of over 1,300 town centres across the UK.

Gross floorspace

Total external floorspace including exterior walls.

Market share/Penetration rate

The proportion of total consumer expenditure within a given area taken by a particular town centre, destination or shopping/leisure facility.

Multi-channel shopping

Products made available to consumers on more than one sales channel, such as ecommerce websites, brick-and-mortar stores, marketplaces, comparison shopping engines, social media platforms, and other online channels.

Multiplex cinema

A cinema complex with five or more screens.

National Planning Policy Framework (NPPF)

The NPPF sets out the Government's planning policies - economic, environmental and social planning policies - for England and how these should be applied. It provides a framework within which locally-prepared plans can provide for sufficient housing and other development in a sustainable manner.

Net (sales) floorspace

Retail floorspace devoted to the sale of goods, excluding backstage/storage space and other areas not accessible to customers.

Oxford Retail Consultants (ORC)

A data consultancy widely used for retail planning information.

Special forms of trading (SFT)

Retail sales via the internet, mail order, stalls and markets, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies.

Use Classes Order (UCO)

A categorisation system within the planning process set out by the Government to label types of property and land based on function.

1.0 Introduction

Overview

1.1 Lichfields has been commissioned by the Braintree District Council ("BDC" or "the Council") to prepare a Retail and Leisure evidence study. Lichfields previously prepared similar studies for the Council in 2012, 2015 and partially updated the study in 2018.

1.2 The updated analysis in this report will inform the preparation of the Council's new Local Plan covering the period up to 2041. The study has been prepared to meet the requirements set out in the National Planning Policy Framework (NPPF), the Planning Practice Guidance (NPG).

1.3 The study is expected to provide a robust and up-to-date evidence base to support policies in the new Local Plan. It reflects recent changes to permitted development rights and the use class order. The evidence will inform new policy and the potential need to allocate sites in the new Local Plan, as well as the implications of Brexit and the COVID-19 pandemic.

1.4 The Study seeks to define the approach to planning for main town centre uses in Braintree, Halstead and Witham, and the district centre at Great Notley, and Local Centres at Coggeshall, Earls Colne, Hatfield Peverel, Kelvedon and Sible Hedingham, as well as local centres proposed at existing and potential future Strategic Growth Locations, and at Maltings Lane Witham and at the out of centre developments of Braintree Retail Park and Braintree Village. This includes setting targets and thresholds for the provision of new retail floorspace, influencing the type and location of retail and leisure uses. The study includes the following:

1 the likely requirement for additional comparison and convenience floorspace in the District in the short, medium and long term up to 2041;

2 the composition and operation of the retail and leisure sector within the main towns, key service villages, and out-of-centre sites in the District;

3 the impact of extended permitted development rights on centres within the District;

4 analysis of the business needs of operators in the main town centres and local centres, and the shopping habits and preferences of consumers;

5 consideration of broader trends and external influences on consumer behaviour, spending and footfall, including land use, accessibility and quality of the environment;

6 policy based recommendations relating to the allocation of sites for future development, the strategic policy approach to retail and leisure development in Braintree, Halstead and Witham, and the application of policy tools, including but not necessarily limited to the hierarchy of retail centres, and the designation of shopping areas;

7 analysis to inform the implementation of a local threshold for the requirements of a Retail Impact Assessment;

8 recommendations for a vison and key objectives for retail and leisure development;

9 a review of retail hierarchy and consideration of the extent of the Town Centre boundary, Primary Shopping Area and Designated frontages;

10 recommendations of policy approach regarding class E uses for the designated town and local centres and risks/opportunities provided by expanded permitted development rights to town centre vitality and vibrancy.

Report structure

1.5 Section 2 of this report provides a summary of current national planning policies and changes to the Use Classes Order introduced in September 2020.

1.6 Section 3 provides an overview of trends and recent changes that will affect the demand for retail and other relevant town centre uses. The appropriate policy and strategy approach for Braintree District should reflect these underlying trends.

1.7 Section 4 examines the existing hierarchy of centres within the District and the surrounding area. Appendix 2 provides more detailed centre health checks and audits for the key designated town, district and local centres in the District, as follows:

- Braintree Town Centre
- Halstead Town Centre
- Witham Town Centre
- Great Notley District Centre
- Coggeshall Local Centre
- Earls Colne Local Centre
- Hatfield Peverel Local Centre
- Kelvedon Local Centre
- Maltings Lane, Witham Local Centre
- Sible Hedingham Local Centre.

1.8 Section 5 sets out the retail and food/beverage floorspace capacity assessment based on the latest available Experian expenditure and sales density projections. The capacity tables are shown in Appendix 3, 4 and 5.

1.9 Section 6 provides an assessment of other main town centre uses including the scope for leisure, entertainment and cultural uses.

1.10 Section 7 reviews potential implications for future development plan policy taking account of updated floorspace capacity projections and recent changes to the Use Classes Order (UCO) and permitted development rights (PDR).

1.11 Section 8 summarises the main conclusions and recommendations.

2.0 National Planning Policy

National Planning Policy Framework

2.1 The latest version (December 2023) of the National Planning Policy Framework (NPPF) remains unchanged in relation to the vitality of town centres. Paragraph 90 indicates planning policies should:

- define a network and hierarchy of town centres and promote their long-term vitality and viability - by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
- define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
- allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
- where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and
- recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.

2.2 The rapid changes that are affecting the retail sector and town centres continue to be acknowledged and reflected in the latest NPPF. It recognises that diversification is key to the long-term vitality and viability of town centres, to 'respond to rapid changes in the retail and leisure industries'. Accordingly, planning policies should clarify 'the range of uses permitted in such locations, as part of a positive strategy for the future of each centre'.

2.3 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with online shopping. Covid-19 and the cost-of-living crisis has elevated this debate. Online shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a broader mix of uses within town centre will become increasingly important i.e. leisure and services as well as retail. It is widely recognised that a broader mix of uses can extend activity throughout the daytime and into the evenings.

Changes to the Use Classes Order

2.4 In September 2020, the UCO was significantly amended. Changes to town centre use classes now allow far greater flexibility for uses to change within town centres without the need to obtain planning permission. The UCO has significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses and retain specific uses previously protected e.g. Class A1 retail.

2.5 In relation to main town centre uses, as defined in the NPPF Annex 2 glossary, the UCO changes provide for three new use classes:

- Class E (Commercial, business and service)
- Class F.1 (Learning and non-residential institutions)
- Class F.2 (Local community).

2.6 The UCO changes now combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. The new Class E includes some uses that are not defined as 'main town centre uses" within the NPPF e.g. medical services and some light industrial uses.

2.7 Other changes potentially introduce more restrictions rather than flexibility. Partly in response to the impact of the Covid-19 crisis, there is added protection against the loss of learning, non-residential and community facilities, including museums, public halls, sports facilities and local shops. These uses are now included in new Classes F.1 and F.2. Class F.2 also includes small, isolated shops (at least 1 kilometre from a similar shop) selling essential goods including food.

2.8 Other potential non-retail town centre uses have been placed in the list of Sui Generis uses, with no permitted changes of use e.g. pubs/bars (A4), takeaways (A5), cinemas and live music venues. The inclusion of these uses as Sui Generis appears to have a dual function i.e. controlling uses such as pub/bars and takeaways that may have an impact on nearby residential amenity, whilst protecting against the loss of other cultural facilities such as cinemas and music venues, most vulnerable to the impacts of Covid-19.

2.9 The previous distinction between Class A3, A4 and A5 uses has become more critical, with Class A3 uses now having more flexibility in the new Class E, but no flexibility for Class A4 and A5 uses. Many Class A3 restaurants offered a takeaway service during the Covid-19 crisis and the categorisation of bar/restaurants has always been arguable and will be a matter of fact and degree on a case-by-case basis. In response to these changes, future land use surveys should categorise uses within centres and frontages to reflect the new UCO, which is helpful when considering appropriate policy options and change of use planning applications.

2.10 The potential implications of permitted changes in use outside town centres may also have unintended consequences. In theory large out-of-centre B1 office buildings or D2 commercial leisure uses, with no restrictive conditions, could be converted to retail use without planning permission or an assessment of the impact on the town centre or application of the sequential test. Allowing retail uses to occupy out-of-centre buildings could run counter to the objective of maintaining and enhancing town centres. This change could have implications for the effectiveness of retail impact and sequential test policies. However, to date there is limited evidence there has been an upturn in out-of-centre retail uses occupying employment or leisure buildings.

2.11 In December 2020, the Government began a consultation on a variety of further changes to permitted development rights relating to housing delivery and public service infrastructure. The consultation included a proposed Class E to Class C3 permitted development right. The outcome of several elements of this were published and the associated amendments to the Town and Country Planning (General Permitted Development) (England) Order 2015 (GPDO) which were laid before Parliament in the Town and Country Planning (General Permitted Development etc.) (England) (Amendment) Order 2021. The Government published an amendment to the General Permitted Development Order in March 2024.

2.12 A new Class MA business and commercial to residential permitted development right has introduced certain commercial to residential permitted development (PD) rights. The new class MA is different to previous retail and office to residential PD rights, with several different limitations and conditions. Delivering housing and the reuse of redundant shopping space is the Government's priority and the Class MA permitted development right emphasises this.

2.13 The new permitted development rights effectively reduce the scope of office to residential permitted development while increasing the scope of retail to residential and introduce new PD rights for other town centre uses to change to residential. The impact of these PD rights on the number of occupied retail premises in town centres is unclear at this stage, but generally the proportion of retail units have been falling over the past decade.

2.14 Class MA allows many properties within Class E to change to residential without consideration of impact on the high street where the proposal is outside of a conservation area and limited consideration if it is within a conservation area. The impact on the character and sustainability of the conservation area needs to be considered for ground floor proposals. There may also be restrictive planning conditions or legal agreements that prevent change of use via Class MA.

2.15 Only listed buildings and their curtilage and properties in the most sensitive locations such as World Heritage Sites and Areas of Outstanding National Beauty are excluded from the new PD right. The legislation requires assessment of loss of retail and office in beautiful and heritage locations, but in no other retail or business destinations. The retail assessment required by the previous Class MA PD right falls away.

2.16 Subject to limitations and conditions, former uses classes Class A1 (shops); Class A2 (financial and professional services); Class A3 (food and drink); Class B1 (business); Class D1(a) (non-residential institutions – medical or health services); Class D1(b) (non-residential institutions – crèche, day nursery or day centre) and Class D2(e) (assembly and leisure – indoor and outdoor sports), other than use as an indoor swimming pool or skating rink, now benefit from the Class MA PD rights. The changes introduced in March 2024 for Class MA remove the requirement that a building must have been vacant for a continuous period of at least 3 months immediately prior to the date of an application for prior approval. Additionally, Class MA is amended to remove the floorspace upper limit for buildings changing use under the right.

2.17 In a conservation area and where the change of use is at ground floor level, the impact on the character and sustainability of the conservation area is another new prior approval matter. Addressing this matter could potentially include a limited assessment of retail impact.

2.18 The requirement to meet space standards in relevant prior approval applications came into force in April 2021. The GPDO does not grant permission for any dwelling that would be less than 37 sq.m or would not comply with the nationally described space standard. These measures have raised concerns about the potential impact on high streets and shopping parades, which are essential to support local communities.

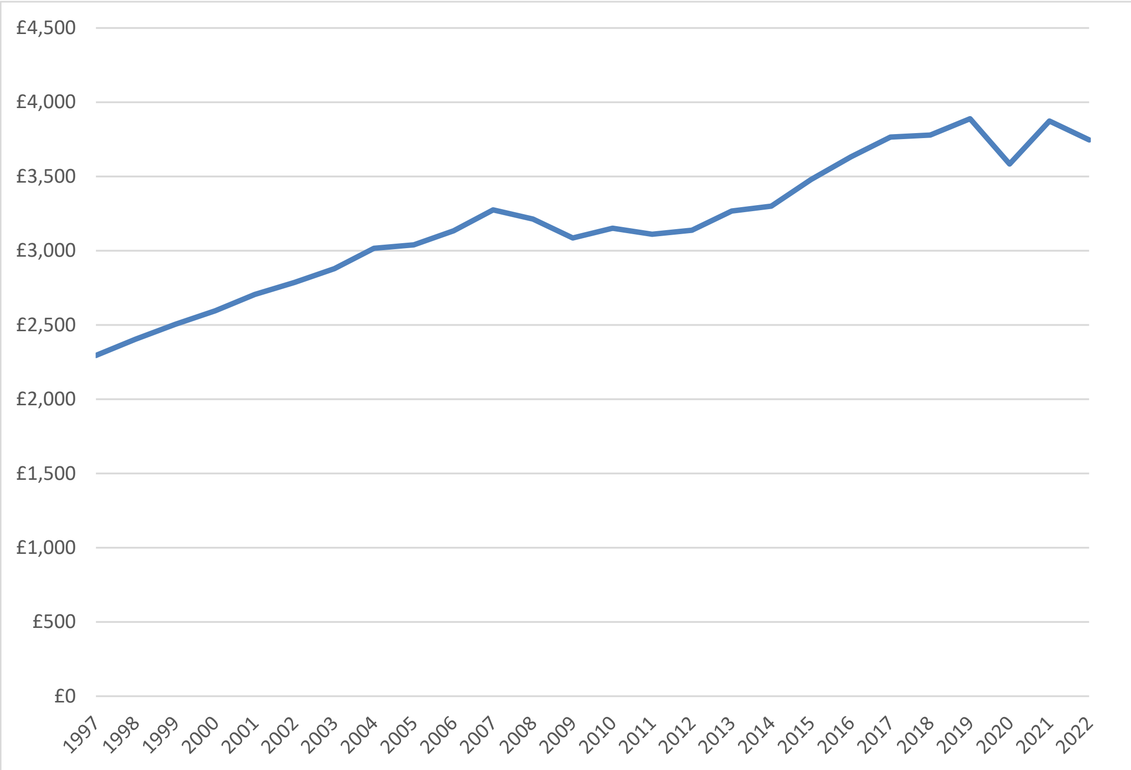
2.19 Many Local Authorities have introduced Article 4 Directions as a mechanism to protect town centres, by removing some of the PD rights. These Article 4 Directions are usually focused on a specific area rather than across the entire town centre.

3.0 Recent trends and key changes

Implications of Brexit, Covid-19 and other trends

3.1 Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. The growth in expenditure per person on comparison retail goods between 1997 and 2022 is shown in Figure 3.1. Experian is a data provider most often used in evidence base studies that provides consumer expenditure data and other economic forecasts. High expenditure growth between 1997 and 2008 fuelled demand for new retail floorspace. However, since the last recession in 2009 comparison goods expenditure growth has been much slower and occupier demand for retail floorspace has reduced significantly, demonstrated by the general reduction in the number of comparison goods shops in town centres (see later in this Section).

Figure 3.1 Comparison goods expenditure average per head in the UK (constant 2019 prices)



Source: Experian Retail Planner Briefing Note 21 (February 2024)

3.2 Experian's latest forecasts suggest slower expenditure growth for both comparison and convenience goods and home shopping/internet spending is expected to continue to grow at a much faster rate than traditional shopping. Experian's short-term expenditure growth projections (2023, 2024 and 2025) for retail and leisure now reflect the expected longer-term effects of Brexit and the Covid-19 pandemic. The current cost of living crisis will also suppress expenditure growth in the short term.

3.3 The main implications of Brexit, Covid-19 and the cost-of-living crisis for the evidence base are likely to be as follows:

- impact on the reliability of demographic and economic projections i.e. population growth and Experian expenditure forecasts;
- short term impacts on the mix of town centre uses and customer behaviour that are likely to distort the base year position; and
- longer term structural impacts that could affect the nature of town centres and the way households shop, eat/drink out and participate in leisure activities.

3.4 The key uncertainties relating to the first two points are primarily the post Covid-19 recovery and the length of the cost-of-living crisis. The longer-term structural implications are harder to predict and quantify at this stage, however there are already signs of a bounce back in terms of expenditure growth, but the cost-of-living crisis may suppress this recovery.

3.5 In the short-term, operators have faced elevated risks to cashflow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services were the hardest hit. Short-term supply chain disruption led to inflationary pressures, which will have an impact on consumer demand. Retailers with infrastructure to fulfil online orders/home delivery benefitted in the short-term. There is likely to be a long-term structural shift to multi-channel shopping, reducing the demand for physical space within town centres.

3.6 Bearing these trends in mind there has been a spike in town centre vacancies with some businesses failing to re-open following the Covid lockdowns, particularly non-food retail operators, restaurants and leisure uses. High levels of inflation and the cost-of-living crisis are likely to exacerbate difficult trading conditions. Many national operators have already announced job losses and store closures.

3.7 Brexit and Covid-19 could have short-term impacts in terms of population migration levels and a pause in construction activity. Given that the focus of this study is to assess the long-term need over the new local plan period within five-year interval projections, development plan policy should assume population projections will return to projected levels before 2031. The population projections in 2031, and certainly 2036, should not be significantly affected by the Covid-19 and cost of living crisis. It is not yet possible to understand if the short-term impact will continue into the medium and longer-term projections to alter previous trends to any greater extent. This study has adopted Experian's latest 2022 population estimates, which reflect these trends.

3.8 Office of National Statistics (ONS) monthly sales volume information for Great Britain indicated total retail sales volumes during the first Covid-19 lockdown were over 22% lower in April 2020 compared with the pre-Covid position in February 2020 (seasonally adjusted). However, in the period between lockdowns (July and August 2020) sales volumes had recovered to pre-Covid levels. By October 2020 retail sales were 7% higher than the pre-Covid figure in February 2020. However, the reintroduction of Covid-19 restrictions saw a reduction in sales in between November 2020 to January 2021, reaching 5% below pre-Covid levels. Sales had recovered to 9% above pre-Covid levels by April 2021. The seasonally adjusted figures for November 2021 were 6% above pre-Covid levels.

3.9 The comparison goods (non-food) sector was particularly affected with a 50% drop in sales from February to April 2020, whilst the food sector experienced a 10% growth in sales during March 2020 in part due to panic buying at the start of the crisis. Food sales volumes were consistently higher than the February 2020 low point during March to November 2020.

3.10 ONS data suggested online retail sales (seasonally adjusted) peaked at over 73% higher in May 2020 compared with February 2020. Figures for June 2020 to May 2021 were consistently higher than the pre-Covid sales in February 2020, with a second peak of nearly 81% higher than pre-Covid levels in February 2021.

3.11 During the first Covid lockdowns food store online sales doubled during May and June 2020 but still represented a relatively small proportion of total sales in this sector, reaching about 11.9% in January 2021, but reducing slightly to 9.7% in November 2021. For the non-food sector online sales as a percentage of total sales nearly trebled between February and April 2020, reaching 45% of sales. By November 2021 online sales in this sector were still 23.2% of total sales, compared with the pre-Covid level of 16.1% in February 2020.

3.12 Experian's Retail Planner Briefing Note 21 (February 2024) suggests non-store retailing's market share increased from 20.4% in 2019 to 30.5% in 2021. Non-store sales include all online sales and other forms of sales not generated from physical retail floorspace e.g. vending machines, party plan and deliveries. Comparison non-store sales increased from 25% to 37.9% and convenience good sales increased from 12.9% to 19.2%. However, Experian indicates comparison goods non-store sales figure fell during 2022 down to 31.5%. Convenience goods non-store sales also fell to 16.4%. Nevertheless, the 2022 figures remain significantly higher than the pre-Covid market shares in 2019. The growth in non-store retail sales for comparison and convenience goods between 2006 and 2022 in the UK is shown in Figure 3.2.

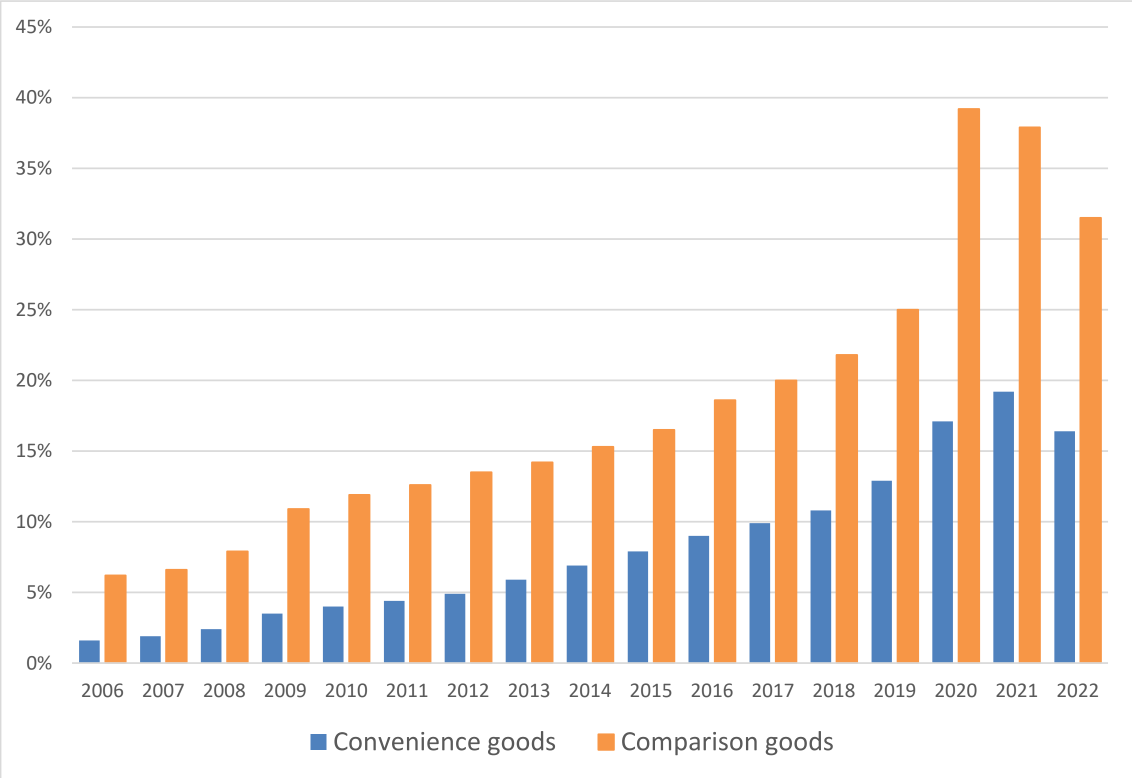
3.13 Between 2006 and 2022 the proportion of comparison goods non-store sales increased by 25.3 percentage points from 6.2% to 31.5%, and the proportion increased by over five times. The proportion of convenience goods non-store sales increased by 14.8 percentage points but increased by over ten times, starting from a lower 2006 base of only 1.6%.

3.14 This data shows a sharp increase in non-store sales during the Covid lockdowns during 2020 and 2021, but a decline in 2022. Experian's forecasts suggest a continued reduction during 2023 but steady growth thereafter. Experian's 2023 forecast figures remain significantly higher than the pre-Covid market shares in 2019.

3.15 ONS's post lockdown data suggests retail sales have recovered to previous levels of growth, but the proportion of retail sales spent online is a higher proportion of total sales, which will have an impact on traditional bricks and mortar retailing. Conversely the introduction of return fees for online shopping and increased fee delivery thresholds may benefit traditional retailing.

3.16 Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth in online shopping when compared with historic trends. It is not appropriate to assume a significant shift towards online shopping, over and above the levels of growth already predicted by Experian, but a higher shift to online shopping is possible. These longer-term forecasts should be monitored and kept under review.

Figure 3.2 Non-store sales as a percentage of total sales in the UK



Source: Experian Retail Planner Briefing Note 21 (February 2024) – Appendix 3

Long-term expenditure trends

3.17 The current cost of living crisis, including the high level of inflation, resulted in a reduction in retail expenditure per person during 2022, with many customers either trading down (buying cheaper products or using discount retailers) or cutting back (buying less products). Experian forecast a continued decline during 2023 and 2024. Low growth is predicted during 2025 and 2026 but higher growth is expected in the longer term.

3.18 Planning based on long term expenditure growth projections has always had inherent uncertainties. Despite these uncertainties, development plans should assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth, as now suggested by Experian, should be adopted, bearing in mind the uncertainties relating to the growth in online shopping.

3.19 For convenience goods, Experian's latest forecasts (February 2024) suggest a continued period of readjustment following high growth in expenditure experienced during the Covid-19 lockdowns in 2020 and 2021. No expenditure growth is envisaged between 2026 to 2030. In the longer-term limited growth is forecast at 0.1% per annum thereafter. Experian suggests convenience goods sales will settle after 2025, following the post-Covid readjustment. Experian expects most growth in the future will relate to non-store sales. Any need for new convenience goods retail floorspace in the District is likely to relate to population growth, high current levels of trading or qualitative areas of deficiency.

3.20 Comparison goods expenditure per head is predicted to fall by 1.2% during 2024 and increase by 2.7% during 2025. Modest growth is expected in the longer term (between 2.8% to 3.1% per annum), but still at a lower rate than previous historic trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.

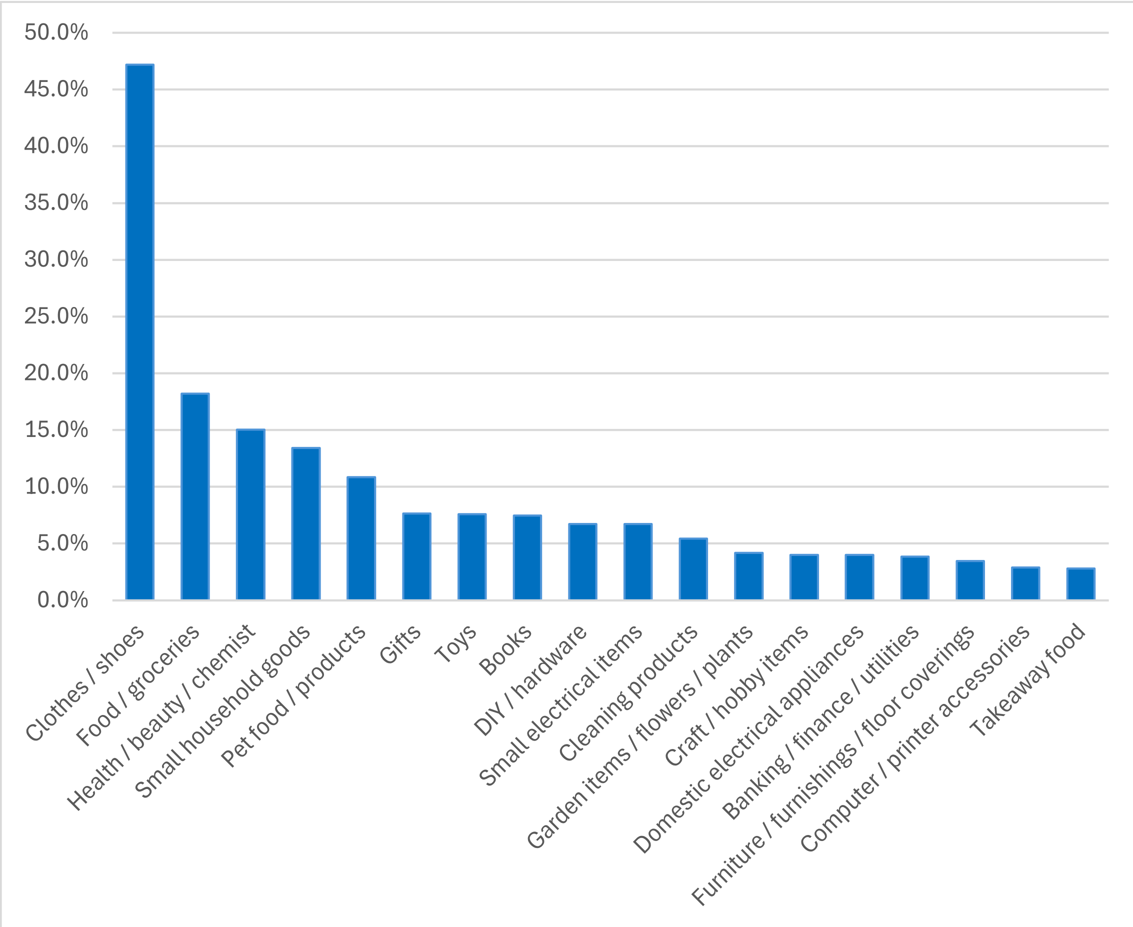
3.21 New forms of retailing (multi-channel, internet/mobile and home shopping) have and will continue to grow. Internet shopping and home delivery has increased with the growth in the use of smartphones/devices and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued steady growth in multi-channel activity.

3.22 The floorspace capacity assessment in this study update makes an allowance for future growth in e-tailing based on Experian's latest projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.

3.23 The household survey results for 700 completed interviews during July 2024 across the Braintree study area as shown in Appendix 1, indicate many households regularly buy items from the internet for home delivery. The survey results suggest 39.7% of respondents do most of their household's non-food shopping online and 13.4% of households did their last main food and grocery shop via the internet/delivery.

3.24 The products most regularly purchased by households online are shown in Figure 3.3. These survey results indicate that a broad range of non-food goods are purchased online, but clothing /footwear and health / beauty items are most often purchased online.

Figure 3.3 Items most (top three) regularly purchased via the internet (% of all households)



Source: Braintree NEMS household shopper survey June 2024 (weighted results)

Mode of travel and frequency of trips

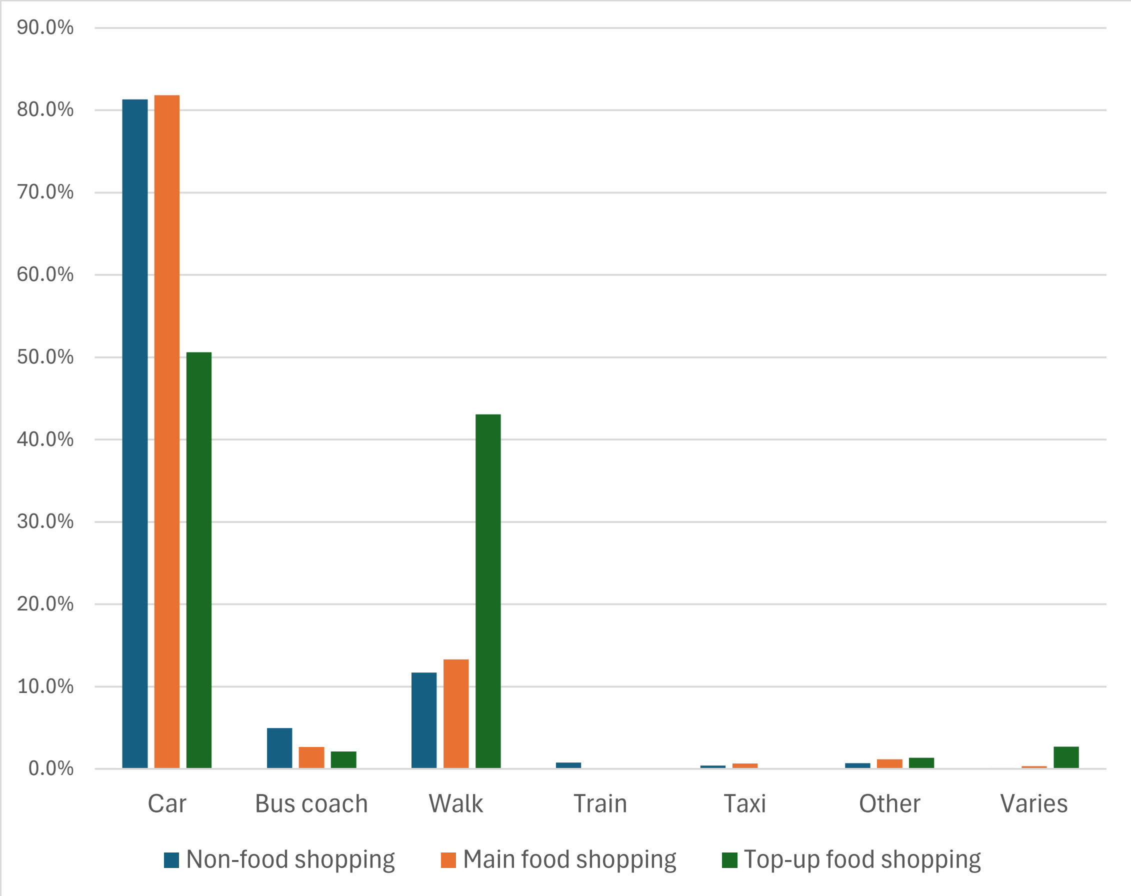
3.25 As indicated above, 39.7% of respondents reported doing most of their non-food shopping online and 13.4% of respondents did their last main food shop online, with Tesco being the online supermarket of choice for over half of these respondents. Experian suggests 26.5% of retail sales was via non-store activity in 2024. The figures suggest many households do not need to travel to undertake food and non-food shopping.

3.26 Despite the increasing proportion of households shopping via the internet, the majority continue to travel to shopping destinations by car. The results for food and non-food shopping (excluding internet/home shopping) are shown in Figure 3.4.

3.27 Shopping by car as the driver is the most popular mode of travel for both non-food and main food shopping trips. Relatively low proportions of customers walk or travel by public transport to shop for both food and non-food shopping.

3.28 Car usage is generally higher for the main food shopping trip than for non-food shopping trips because many households undertake bulk food and grocery shopping once a week or less often. However, in the Braintree study area, car travel is very similar for both main food and non-food shopping, although car travel is much lower for top-up food and grocery shopping. Bus travel is slightly higher for non-food shopping.

Figure 3.4 Mode of travel for non-food, main and top-up food shopping (% of travelling household respondents)



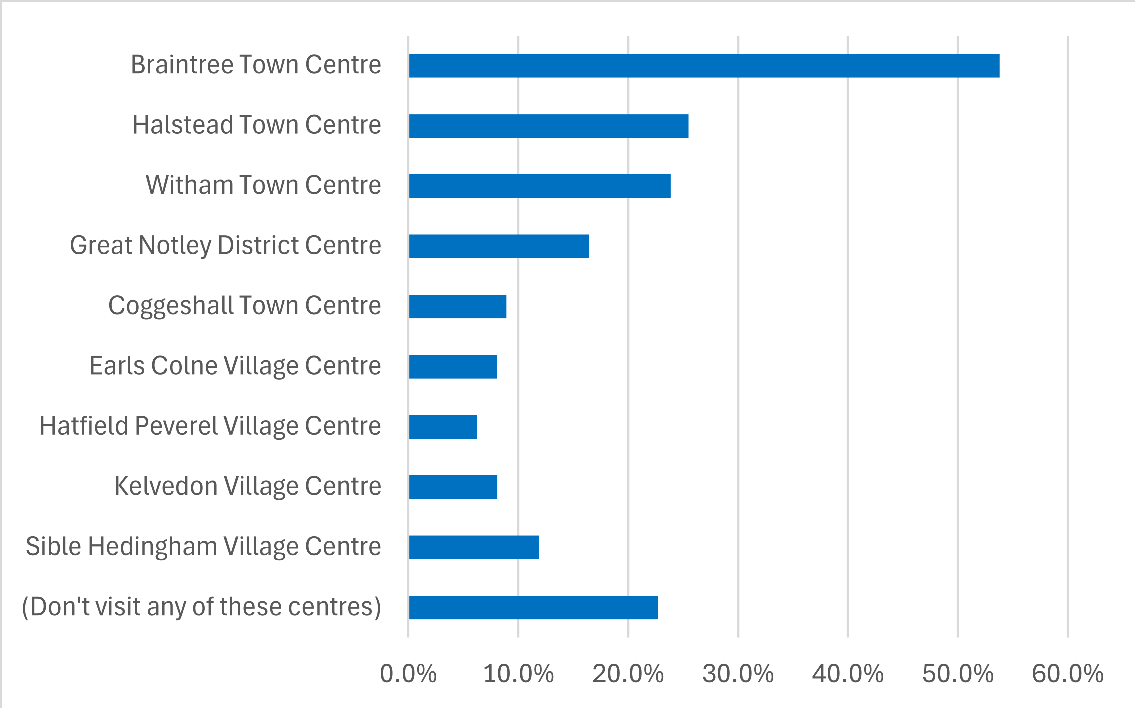
Source: Braintree NEMS household shopper survey June 2024 (weighted results).

3.29 Car travel for food and non-food shopping was high across all zones. Based on Lichfields' recent experience, car usage for shopping is generally lower within predominantly urban areas and higher in rural areas i.e. normally below 70% of households for main weekly shopping in urban areas and over 85% in rural areas. Car usage for the main food and grocery shopping and non-food shopping in the Braintree study area reflects the mix of urban and rural areas. Lower levels of car usage in urban areas are normally due to higher levels of access to shopping facilities, both on foot and via public transport.

Activities undertaken by visitors to Braintree's centres

3.30 Respondents to the household survey were asked if they had visited the town, district and village centres in the District during the daytime or evenings to use the shops, services or leisure facilities in the last year. Braintree, Halstead and Witham town centres were the main destinations visited by households in the study area, as shown in Figure 3.5. Nearly 23% of households had not visited any centre in Braintree District during the last year, but these respondents lived predominantly in the peripheral rural zones. Less than 7% of households in the central zones (1- Braintree, 3 – Witham and 4 – Halstead) had not visited any centre in Braintree District. The results indicate many households had visited more than one centre in the District.

Figure 3.5 Braintree District's centres visited by households durnng the last year (% of all study area households)



Source: Braintree NEMS household shopper survey June 2024 (weighted results).

3.31 The average length of stay during visits to the three main town centres ranges from 84 to 99 minutes, as follows:

- Braintree 99 minutes
- Halstead 91 minutes
- Witham 84 minutes.

3.32 Witham (16.8%) and Halstead (15.9%) had a higher proportion of visitors stay in the centre for 30 minutes or less when compared with Braintree (9.2%). The average length of stay varies slightly and reflects the range and choice of shops, services and facilities available in each centre.

3.33 The variety of activities carried out by visitors to each centre is shown in Table 3.1. The results indicate that most households undertake multiple activities in Braintree's centres. Non-food shopping is marginally the most popular activity in Braintree and Halstead and food shopping is marginally the most popular activity in Witham. All three centres have reasonably high levels of non-food and window shopping. The role of food shopping is significant in all three centres. The household survey indicates 39% of households link their main food and grocery shopping trip with other activities, which underlines the importance of linked food and grocery shopping trips in town centres.

Table 3.1 Actvities carried out by visitors to each town centre (% of all visitors to each centre)

Activity	Braintree	Halstead	Witham	Average for all centres
Shopping				
Non-food shopping	58.7	53.5	47.0	**53.1**
Food shopping	42.3	45.1	51.9	**46.4**
Window shop/browse	13.0	14.4	14.0	**13.8**
Visting the market	4.7	4.6	0.2	**3.2**
Leisure				
Go for a walk	0.4	7.2	1.3	**2.9**
Café/pub/restaurant	27.9	29.5	30.6	**29.3**
Leisure activity	4.4	10.6	8.1	**7.7**
Other services				
Banks/ financial	17.0	1.3	1.8	**6.7**
Health facilities	9.8	16.3	7.3	**11.2**
Library	0.5	2.2	0.8	**1.2**
Getting fuel	0.2	1.6	0.3	**0.7**
Post office	3.3	13.5	2.2	**6.4**
Other service uses	10.7	13.7	6.8	**10.4**
Other activities				
Travelling to/from work	2.6	2.2	1.7	**2.2**
Education/school run	2.0	4.4	1.6	**2.7**
Visting family/friends	5.1	11.6	3.8	**6.8**

Source: NEMS household survey June 2024. * percentages add to more than 100% due to multiple activities.

3.34 Food and non-food shopping remains important to all three centre's overall vitality and viability, but a good range of non-retail services is also important. All three centres have a reasonable proportion of visitors using cafés/pubs/restaurants suggesting there is an important evening economy.

Demand for Town Centre Uses

3.35 In the past, lower expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data for retail, food/beverage and service units) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but increased back to over 14.8% in 2024. There has been a sharp increase in shop vacancies in many town centres due to the impacts of the Covid-19 pandemic, the cost-of-living crisis and the growth in online shopping. The more recent impact of higher inflation and the cost-of-living crisis is also likely to constrain consumer demand, which may affect the demand for floorspace at least in the short term.

3.36 Land use information and site visits by Lichfields in July 2024 indicate there were 72 vacant units in the town, district and local centres in the District. The District wide shop vacancy rate was 10.6% compared with the current Goad Plan UK average of 14.8%. There were 58 vacant units in the three main town centres and 14 vacant units in the local centres.

3.37 In 2014, 59 vacant units were identified in the three main town centres, which suggests vacancy levels have not increased despite the national trends identified above. All three town centres have a shop vacancy rate below the UK average. The distribution of vacant unit and vacancy rates are set out in Table 3.3.

Table 3.2 Vacant shop units in Braintree District

Centre	Number of vacant units	% of all units
Braintree	29	10.9
Halstead	16	11.1
Witham	13	8.4
Great Notley	0	0.0
Coggeshall	6	15.0
Earls Colne	3	10.0
Hatfield Peverel	2	18.2
Kelvedon	2	13.3
Sible Hedingham	1	6.3
Total	**72**	**10.6**

Source: Lichfields land uses survey July 2024

3.38 The underlying increase in vacant units across the UK is primarily due to the reduction of comparison goods retail outlets. In most centres, non-retail services have helped to replace some of the lost comparison goods retail outlets. A more detailed analysis of the mix of uses in the District's main centres compared with the national picture is set out in Appendix 2.

3.39 Property owners, landlords and funds have come under increasing pressure with struggling occupiers seeking to renegotiate terms through a company voluntary arrangement (CVA) i.e., an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all debts. Elsewhere, retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/leisure assets. These trends were exacerbated by Covid-19 and the cost-of-living crisis and will continue in the short-term.

3.40 Whilst the CVA process has created difficulties for landlords in terms of rent negotiations, at the same time newly freed-up space has provided new opportunities. Vacated premises have been reconfigured and reused for food/beverage, trampolines, climbing and indoor golf and other sports activities.

Food store operators

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

3.42 Across the UK the number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. The number of Tesco Express stores has increased by 35%, from 1,427 stores in 2012 to 1,920 stores in 2020 (source: Mintel).

During the same period Sainsbury's Local stores increased by 83% and the number of Little Waitrose stores doubled. The number of Asda Express and Morrisons Daily stores has also increased. This trend is evident in the District, with three Morrisons Daily stores in Braintree, Witham and Coggeshall. There is also a Tesco Express store in Braintree and an Asda Express in Witham. However, the local convenience store sector in the District is still dominated by older Co-op stores.

3.43 Several proposed larger food superstores have not been implemented across the country and there has been a move away from larger superstores to smaller formats, reflecting changes in some customers' shopping habits i.e. more frequent but smaller food and grocery shopping trips. This trend may have increased with more homeworking during the pandemic lockdowns, which may not move back to pre-Covid levels in the future.

3.44 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. These operators are now competing more directly for market share with other main food store operators. Home Bargains and B&M have also expanded rapidly in recent years. This trend is now evident in Braintree with Lidl stores in Braintree, Halstead and Witham and an Aldi store in Witham. There is also a B&M store in Braintree.

3.45 The number of small independent food and grocery shops in town centres declined over many years, as the number of large food stores increased. In the last decade this trend slowed and has to some extent reversed with some customers preferring to visit specialist shops e.g. butchers, bakers and greengrocers.

Comparison retailers

3.46 Comparison retailers responded to difficult market conditions before the Covid-19 pandemic. The bulky goods warehouse sector (i.e. DIY, furniture, floor coverings and electrical goods) had already rationalised, including mergers and failures, and scaled down store sizes. Other traditional high street retailers previously sought large out-of-centre stores, for example Next, TK Maxx and M&S. Matalan also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct had expanded out-of-centre. These trends have slowed significantly, and in some cases reversed, and are unlikely to re-emerge for the foreseeable future.

3.47 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, has been particularly weak in recent years. This has led to voids on some retail warehouse parks and proposals to extend the range of goods sold to non-bulky comparison goods. This trend has also led to the relocation of retailers to out-of-centre locations, creating more vacant units in town centres. The discount sector has occupied many units on retail parks e.g. Home Bargains, Poundland and B&M Bargains.

3.48 Braintree Retail and Leisure Park is the main concentration of retail warehouses, with American Golf, B&Q, Carpetright, Dreams Beds, Halfords, M&S, Next and TK Maxx outlets. There are concentrations of retail warehousing in neighbouring settlements that also serve the District e.g. Colchester (Tollgate Shopping Park/Stane Park and Turner Rise Retail Park) and Chelmsford (Chelmer Village Retail Park).

3.49 Within centres, many high street multiple comparison retailers have changed their format. For over two decades, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation into the larger regional and sub-regional centres. Many multiple retailers now require representation in fewer locations to service catchment areas. This trend is evident in most centres in Essex, with the main focus of comparison goods national multiples present is in Chelmsford, Colchester and Lakeside Thurrock.

3.50 Designer Outlet Villages emerged in the UK during the mid-1990. Products at outlet stores are usually sold at reduced prices compared to regular stores due to being overstock, returned, factory seconds, or lower-quality versions manufactured specifically for outlets. Braintree Village (formerly Freeport Village) in Braintree is an outlet shopping destination with a combination of fashion, homeware, accessories and restaurants. It serves the District and wider sub-region.

3.51 In general, operator demand for space has decreased significantly during the last five years and, of those national multiples looking for space, many prefer to locate in larger sub-regional and regional centres e.g. Chelmsford, Colchester, Lakeside and Cambridge. Town centres in the District are at the lower levels in the hierarchy and multiple operator demand will continue to be more limited in the future. Polarisation of investment in the larger centres is likely to continue, with many retailers reducing their overall number of outlets. Braintree town centre has the best prospects for attracting new multiple retailers but could lose existing operators if consolidation into the largest regional centres continues.

3.52 The continuation of these trends will influence future operator space requirements in the District with smaller vacant units and lower tier centres continuing to be less attractive for new multiple occupiers, and retailers increasingly looking to locate into units in larger centres. However, smaller vacant units could still be attractive to independent traders and non-retail services looking to serve local catchment areas.

Charity and discount shops

3.53 The charity shop sector has grown steadily over the past 30 years and there is no sign this trend will change soon. This trend has raised concerns in some areas regarding over concentrations of charity shops at the expense of other retail uses. Nevertheless, these outlets do provide an important role in offering affordable goods and a service to those wanting to recycle goods.

3.54 Planning policies cannot control the amount of charity shops because they fall within the same use class as other shops (now Class E). In many centres, charity shops have occupied vacated shop premises during previous recessions. This trend is particularly evident in Braintree District, where charity/second-hand shops make up 18.4% of the comparison shops. This provision is comparable with the UK average of 10%.

3.55 Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It does not follow that these charity shops will be replaced by traditional shops when the market recovers.

Non-retail services

3.56 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. The non-retail service uses include the following Class E and Sui Generis uses:

- hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as hot food takeaways), funeral parlours and post offices;
- banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies;
- restaurants, cafés and hot food takeaways; and
- pubs/bars.

3.57 The number of bank/building society outlets has decreased significantly during the last two decades, with banks looking to reduce costs and the increase in online banking. Nationally, the proportion of town centre units occupied by banks/building societies was 4.6% of all units in 2005. This proportion had reduced to 2.8% in 2017 and was only 1.3% in 2024. Many smaller town centres now have no remaining banks/building societies. The 2024 land use surveys indicated there were only 11 banks/building societies in the three main town centres, which is just under 2% of all units in the centres and higher than the current national average (1.3%). Across the UK banks/building societies tend to concentrate their outlets in the largest centres in local areas. This trend is evident in the District, with Braintree town centre having seven banks/building societies. Continued rationalisation of the banking sector could lead to an increase in town centre vacancies.

3.58 The growth of money lending/pay day loan shops, betting shops and hot food takeaways has raised concerns amongst many local planning authorities and has resulted in a change to permitted development rights (PDR) to control the growth of these uses in town centres. These growth trends are not particularly evident in Braintree.

3.59 There were nine betting shops in the three town centres in 2024, which is 1.6% of all units, slightly above the UK average of about 1%. There are no obvious over-concentrations of betting shops in the District's centres.

3.60 There were 46 hot food takeaways in the three town centres, 8.2% of all units, which is above the UK national average of 6.4%.

3.61 Changes to the GPDO has had an impact on some town centres but the more recent changes to the Use Classes Order (UCO) and permitted development rights (PDR) are likely to lead to more significant changes in the future. These measures allow for much greater flexibility for changes of use from retail to non-retail uses. To date, these measures have not significantly changed the composition of most town centres, which may have been supressed by the Covid pandemic. The impact of these changes will need to be carefully monitored by undertaking regular town centre land uses surveys. The cost-of-living crisis may increase demand for change from retail to other uses.

The evening economy

3.62 Food/beverage, leisure and entertainment are fast moving and creative sectors, with a steady flow of new concepts emerging. Within these sectors there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage, but primarily in larger centres.

3.63 Recently restaurant chains have experienced difficulties resulting in closures, which suggests operators may have over-stretched. Demand continued to increase for coffee shops, such as Starbucks, Costa Coffee and Caffé Nero. National branded pub/restaurant chains invested heavily and not exclusively in larger centres. Themed restaurants also expanded rapidly. This sector in town centres was the most adversely affected by the Covid-19 crisis. Restaurants, cafés, sandwich bars and coffee shops are now in the new Use Class E, whilst pubs/bars and hot-food takeaways are Sui Generis. In terms of how customers use food and beverage outlets the key categories are:

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

3.64 The proportion of non-retail uses within town centres across the UK increased significantly before the Covid-19 crisis. This trend was evident in the District, and this sector appears to have recovered following the Covid crisis.

3.65 There were 132 food/beverage outlets in the three town centres in the District, 23.6% of all units, which is slightly above the UK average of 22.2%. The provision of restaurants/cafés (60 outlets) is comparable with the UK average (10.7% of all units). Witham town centre has an above-average restaurant/café representation (15%), with Braintree (8.7%) and Halstead (9.7%) town centres slightly below-average.

3.66 The provision of hot food takeaways in the three town centres (46 outlets – 8.2%) is slightly above the UK average (6.4%). In line with national trends, the number of restaurant, cafés and hot-food takeaways has increased in the three town centres from 98 outlets in 2015 to 132 outlets in 2024, a 35% increase. In Witham town centre the number of outlets increased from 27 in 2015 to 45 in 2024, a 67% increase.

3.67 There are 26 pubs/bars (4.6% of all units) in the three town centres, which is slightly below the UK average (5.1%). The proportion of pubs/bars in Braintree town centre is low for a centre of its size (3%), whereas Halstead and Witham town centres are slightly above the UK average.

3.68 There are 60 restaurants/cafés (10.7% of all units), which is consistent with the UK average. The proportion of restaurants/cafés in Witham town centre is high for a centre of its size (15%), whereas Braintree and Halstead town centres are slightly below the UK average.

3.69 Overall, the three town centres in the District have a reasonably strong evening economy, with a particularly good provision of café/restaurants in Witham town centre.

Pop-up spaces

3.70 The increase in vacant space across the UK has led to an increase in premises available for temporary uses or pop-up uses including temporary restaurants, bars, shops and galleries.

Some landlords have opted for flexible leases, with changing attitudes towards short-term spaces. New independent brands have benefitted despite the lack of brand recognition. E-commerce brands have also sought physical presence, as an essential part of their marketing strategy and an effective way to engage with existing and new customers off-line. Brands have opened pop-up outlets in different locations to test and learn before committing to permanent stores. This trend may increase during the cost-of-living crisis.

Summary

3.71 The trends and changes highlighted in this section, including the growth of home shopping, are not new and have been affecting the high street for many years. In response to these trends, most town centres have changed and diversified. The food/beverage, leisure and non-retail service sectors have to some extent been successful in occupying space no longer attractive to retail tenants. However, the shop vacancy rate in the District remains relatively low at 10.6%, below the UK average (14.8%). Although the vacancy rate in relatively high in some local centres i.e. Coggeshall and Hatfield Peverel.

3.72 There have been cyclical trends in vacancy rates reflecting the macro-economic trends, but in most cases, town centres recovered during periods of stronger growth. Many believe the most recent decline is structural rather than cyclical and a more flexible approach to town centre uses is required.

3.73 The most recent trends suggest vacancy rates have been slow to recover in weaker centres, and many high street retailers are still experiencing difficulties. The Goad national shop vacancy rate has increased to over 14% and therefore a cautious approach to future development needs is required. The implications of the cost-of-living crisis also endorse a cautious approach to providing additional retail floorspace, particularly in out-of-centre locations.

3.74 Shopping behaviour will continue to change, and town centres will need to respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail, leisure and cultural experience for those looking for a "day out" or "evening out”.

4.0 Hierarchy of centres

National policy

4.1 The NPPF (paragraph 86) indicates planning policies should define a network and hierarchy of town centres and promote their long-term vitality and viability by allowing them to grow and diversify. Town centres as defined in the NPPF comprise a range of locations where main town centre uses are concentrated, including city and town centres, district and local centres. Local centres exclude small parades of shops of purely neighbourhood significance. The NPPF and PPG provide limited guidance on how to categorise town, district and local centres.

Designated centres in Braintree District

4.2 Braintree's two-part Local Plan (2013-2033) identifies three categories of retail centres in Policy LPP9, 'Retailing and Regeneration'. The retail hierarchy of centres is as follows:

Town Centres

- Braintree
- Witham
- Halstead

District Centres

- Great Notley

Local Centres

- Coggeshall
- Earls Colne
- Hatfield Peverel
- Kelvedon
- Maltings Lane, Witham
- Sible Hedingham

4.3 The Local Plan identifies a range of retail and service centres, from medium sized towns to district and local centres. Each performs a particular role to meet the needs of its catchment population and is part of a network of centres within the District.

- Town Centres are described as usually being the principal centre within a Local Authority, functioning as important service centres for extensive rural catchment areas.
- District centres are comprised of groups of shops, often with one superstore/ supermarket and a range of non-retail services such as banks, building societies, restaurants, and public facilities such as libraries.
- Local centres contain a range of local, small shops, serving a small catchment. They typically include a small supermarket, newsagent, sub-post office and a pharmacy amongst other shops.

4.4 This hierarchy directs growth in line with centre size, with large scale developments 'focused on the town centres'. It also protects local centres from 'inappropriate development', enabling small-scale retail, services and facilities to serve local residents.

4.5 The Council wants to improve and protect these centres, reducing the need for unnecessary travel to alternative facilities and ensure that the proportion of expenditure going outside the District does not increase.

4.6 Areas of Braintree District lie within the shopping catchment areas of the larger centres of Colchester and Chelmsford, influencing shopping patterns to varying degrees across the District. Connections further afield to Cambridge and Central London may also impact in-District spending retention. Within the District, Braintree is the largest centre, followed by Witham and Halstead. These settlements are concentrated in the east and southeast of the District.

4.7 The number of retail, food/beverage and non-retail service outlets in each centre is shown in Table 4.1. Braintree town centre is the largest centre with a reasonable choice of retail outlets, food/ beverage and service uses. Braintree town centre has 61 comparison goods outlets, which is over 38% of all comparison goods outlets in centres across the District. Halstead and Witham town centres are similar in size but significantly smaller than Braintree town centre. Great Notley only has five retail/service uses, but the centre is dominated by a large Tesco superstore.

4.8 Coggeshall and Earls Colne are much larger than the other local centres at Hatfield Peverel and Sible Hedingham. The Braintree Village shopping centre has over 70 outlets including 66 comparison goods stores and 7 restaurants.

Table 4.1 Town, district and local centres in Braintree District – number of outlets by use

	Total units	Comparison goods retail	Convenience goods retail	Food/ beverage	Other services*	Vacant units
Braintree Town Centre	**263**	61	21	52	100	29
Halstead Town Centre	**144**	39	10	35	44	16
Witham Town Centre	**153**	40	8	45	47	13
Great Notley District Centre	**5**	0	1	2	2	0
Coggeshall Local Centre	**40**	9	2	9	14	6
Earls Colne Local Centre	**30**	5	4	8	10	3
Hatfield Peverel Local Centre	**11**	1	2	2	4	2
Kelvedon Local Centre	**15**	2	3	4	4	2
Maltings Ln, Witham Local Centre	**2**	0	1	1	0	0
Sible Hedingham Local Centre	**16**	3	5	3	4	1
Total	**679**	**160**	**57**	**161**	**229**	**72**
% all units	100.0	23.6	8.4	23.7	33.7	10.6

Source: Lichfields' land use survey July 2024.
* excluding Class B, office, Class D1/D2 and residential uses.

4.9 The analysis of the hierarchy of centres indicates Braintree District has a well-established network of centres serving their respective areas. The town, district and local centres should continue to be protected and enhanced.

4.10 The household survey results also shed light on the position of each centre in the hierarchy. Respondents were asked at which location they buy most of their household's non-food shopping. Respondents were also asked which of the main centres in the District they had visited to use shops, services and leisure facilities in the last year, and the results are shown in Table 4.4.

4.11 Braintree town centre is the main non-food shopping destination in the District, followed by Witham and Halstead and then Great Notley. The proportion of all respondents in the study area who do most of their non-food shopping at other centres is very low (ranging from 0% to 0.1%), which reflects their size, limited number of comparison goods shops and limited importance in the wider hierarchy. A large number of main non-food destinations located outside Braintree District were mentioned by respondents, including centres in Chelmsford (12.1%), Colchester/Tollgate/Stane Park (7.9%), Bury St. Edmunds (4.2%) and Cambridge (2.4%).

Table 4.2 Destinations used by households (% of all respondents in the study area)

Destination	Visited during the last year	Main non-food shopping destination*
Braintree town centre	53.8	14.4
Halstead town centre	25.5	4.2
Witham town centre	23.9	7.0
Great Notley district centre	16.5	2.4
Coggeshall town centre	8.9	0.0
Earls Colne village centre	8.1	0.0
Hatfield Peverel village centre	6.3	0.1
Kelvedon village centre	8.1	0.0
Sible Hedingham village centre	11.9	0.1

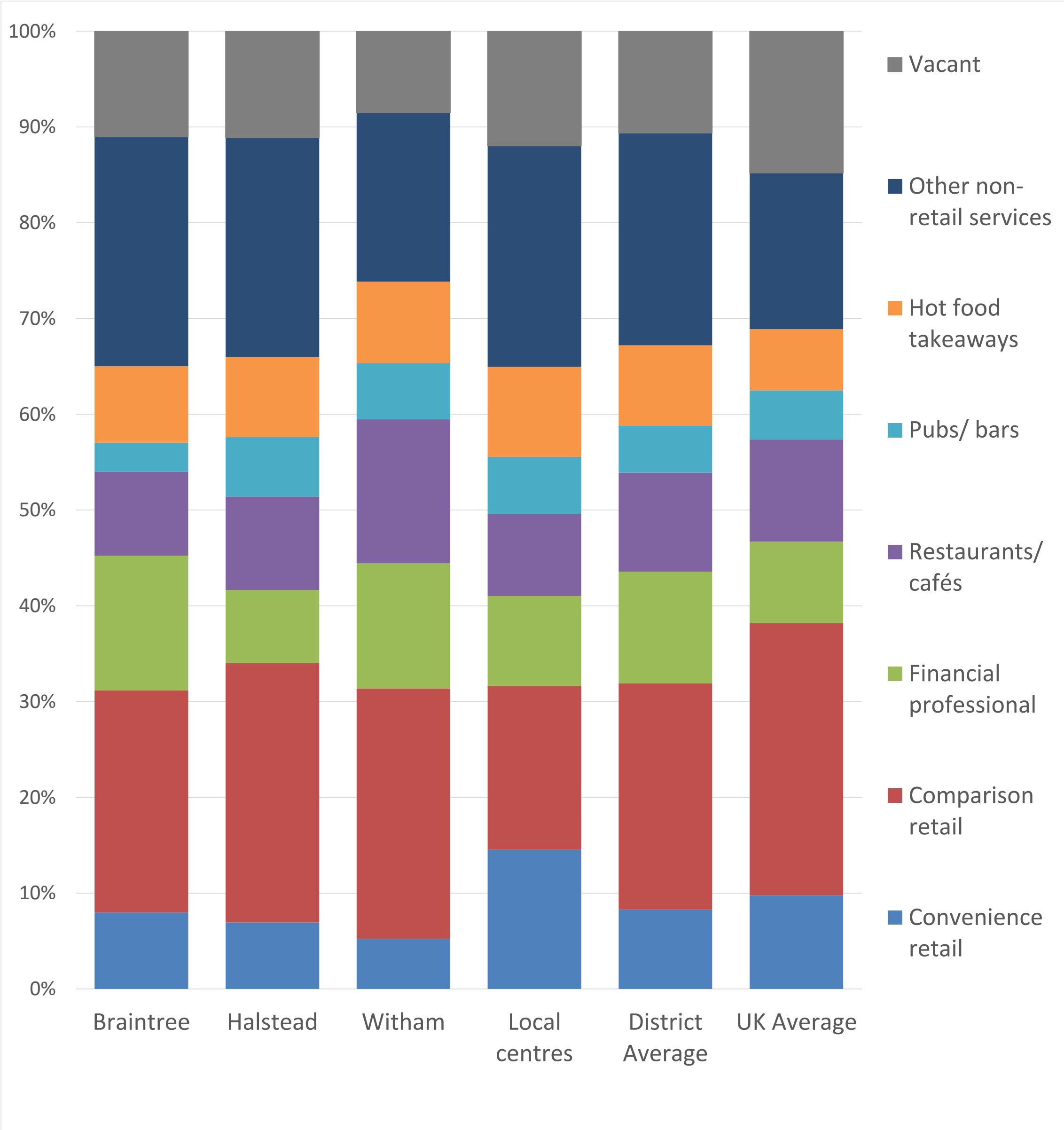
Source: NEMS household survey (July 2024) * excluding internet/home shopping respondents

Diversity of main town centre uses

4.12 Figure 4.1 below shows the composition of the three centres and local centres in terms of the mix and proportion of different uses i.e. the proportion of shop units within each use class. This is compared with the District and Goad Plan average mix for centres across the UK. More detail is provided in the health check analysis in Appendix 2.

4.13 The overall mix of use in the District is broadly in line with the UK average in terms of convenience goods retail, restaurants/cafes and hot food takeaways. There is generally a lower proportion of comparison goods outlets, but a higher proportion of financial/ professional services and other non-retail services. The local centres have a higher proportion of convenience goods retail outlets, and conversely a lower proportion of comparison goods retail outlets. Vacant units in the three town centres are below the UK average.

Figure 4.1 Mix of retail and service uses (excluding office, medical, community and residential uses) - % of all units

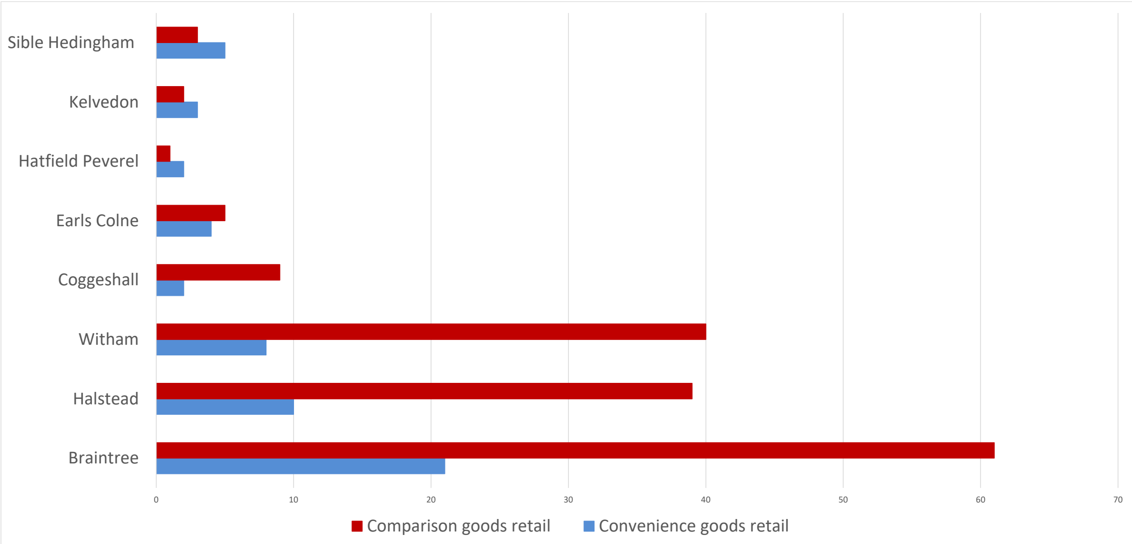


Source: Lichfields' land use survey July 2024 and Experian Goad Plan UK averages.

Retailer representation

4.14 Figure 4.2 compares the proportion of convenience and comparison retail units within centres. Most of the District's comparison and convenience goods retail outlets are focused in Braintree town centre and to a lesser extent Halstead and Witham town centres. In general, larger centres tend to have a higher proportion of comparison goods shop units than the smaller local centres. Larger centres tend to have a stronger focus on fashion shopping and therefore have a higher proportion of comparison shops. Smaller centres tend to have a higher proportion of convenience goods units and non-retail services, catering for the day to day needs of their local catchment area. Convenience goods retail and non-retail services perform an important role in all centres, serving relatively localised needs. A more detailed analysis of the mix of retail uses in each centre is shown in the town centre health checks in the Appendices.

Figure 4.2 Comparison and convenience goods retail outlets (number of units)



Source: Lichfields' land use survey July 2024.

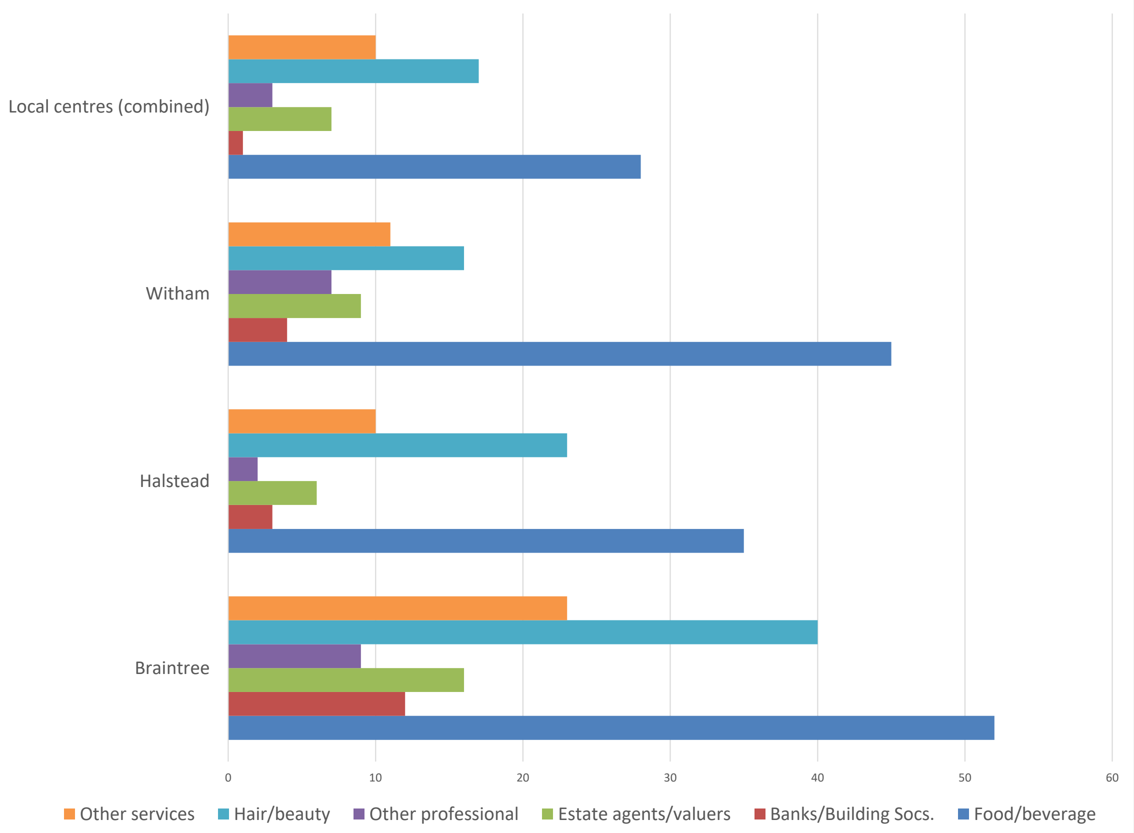
Service Uses

4.15 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. Figure 4.3 below summarises the number of outlets in different service categories in the town and district centres and the local centres combined. The service uses are categorised as follows:

- financial and professional services including banks, building societies, financial services, estate agents and employment agencies;
- food/beverage uses including restaurants, cafés, pubs, bars and hot food takeaways; and
- other non-retail services including a wide range of uses, such as hairdressers, dry-cleaners, travel agents, beauty salons and post offices.

4.16 All three main town centres (Braintree, Halstead and Witham) have a reasonable selection of food/beverage outlets. Witham has a higher than average proportion of restaurant/cafés. There is also a relatively strong provision of other non-retail services, particularly hairdressers/beauty salons in Braintree and Halstead town centres and estate agents in Braintree and Witham. The provision of banks/building societies is concentrated in Braintree town centre, consistent with the national trend where banks/building societies tend to concentrate their outlets in the largest centres in local areas.

Figure 4.3 Distribution of non-retail service uses (number of outlets)



Source: Lichfields' land use survey July 2024.

4.17 A more detailed analysis of the mix of services uses in each town centre is shown in the centre health checks in the Appendices.

Summary

4.18 The analysis of the hierarchy of centres in this section indicates the District has a well-established network of centres that serve their respective areas. Braintree town centre and Braintree Village/Braintree Retail Park are the only shopping/leisure destinations with district-wide catchment areas. Shop vacancy rates below the UK average but are relatively high in some local centres i.e. Coggeshall and Hatfield Peverel. Identifying the hierarchy of centres in future development plans will be important in terms of:

- ensuring the vitality and viability of centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
- directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
- identifying a viable and complementary role and strategy for each centre, recognising their different strengths and potential.

4.19 The network of centres should be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping and leisure patterns. The implications of these factors for future policy and strategy are addressed in later sections of this report.

5.0 Retail and food/beverage capacity

Introduction

5.1 This section assesses the quantitative and qualitative need for retail and food/beverage uses in the District. The National Planning Policy Framework (NPPF) indicates that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping and food/beverage (eating and drinking away from the home).

Assumptions and base data

5.2 All monetary values expressed in this study are at 2022 prices, consistent with Experian's base year expenditure figures for 2022, which are based on actual recorded expenditure levels rather than projections.

Study area zones

5.3 A household telephone survey was undertaken during June 2024. The primary catchment areas of the main centres extend beyond the District boundary, particularly to the west. The study area is shown in Appendix 1. This study area has been sub-divided into five zones based on postcode areas to reflect the primary catchment areas of the main centres in the District.

5.4 The projected population within each zone between 2024 to 2041 is set out in Table 1 in Appendix 3, sourced from Experian. The base year 2024 population within the study area is 265,760. This population is projected to increase to 281,123 by 2041, an increase of +5.8%.

Retail expenditure

5.5 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2022 have been obtained.

5.6 Experian's latest national expenditure information (Experian Retail Planner Briefing Note 21 – February 2024) has been used to forecast expenditure within the study area. Experian's short-term growth forecast rates during 2023, 2024 and 2025 reflect current economic circumstances, including Covid-19 and the cost of living crisis. The forecast changes during this period are as follows:

- convenience goods: -3.6%
- comparison goods: -1.9%
- leisure: -1.0%.

5.7 These short-term forecasts reflect post Covid lockdown re-adjustments during 2022 and 2023. Convenience goods expenditure increased during the lockdowns with households eating out less often than before the pandemic. Convenience goods expenditure is forecast to decline during 2023, 2024 and 2025. Comparison goods and leisure expenditure, including eating and drinking out, reduced significantly during the lockdowns. The leisure sector recovered during 2022, but a small decline in forecast during 2023 and 2024. The comparison goods retail sector is expected to decline during 2023 and 2024.

5.8 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's medium and long-term growth average forecasts have been adopted. These longer-term forecasts reflect Experian’s views on the post Covid and cost of living crisis recovery. The growth forecasts are as follows:

- convenience goods: no growth during 2026 to 2030 and +0.1% growth per annum beyond 2030;
- comparison goods: +3.1% per annum growth for 2026 to 2030 and +2.8% per annum beyond 2030; and
- leisure: +1.1% per annum growth for 2026 to 2030 and +0.8% per annum after 2030.

5.9 These growth figures relate to real growth and exclude inflation.

5.10 Experian's latest adjusted deductions for SFT (i.e. home and online shopping through non-retail businesses) in 2024 are:

- 5.2% of convenience goods expenditure; and
- 24.3% of comparison goods expenditure.

5.11 Experian's projections suggest that these percentages will increase to 7.2% and 29.3% by 2036, respectively.

5.12 Table 2 in Appendix 3 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2036, excluding SFT/online sales through non-retail businesses. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 4 and food/beverage expenditure is shown in Table 2 in Appendix 5.

5.13 Based on forecast changes in population and per capita spending (excluding SFT), total convenience goods spending within the study area is forecast to increase by +4.3% from £652.41 million in 2024 to £680.44 million in 2041, as shown in Table 3 (Appendix 3). This expenditure increase is due to population growth. Expenditure per capita is forecast to decrease slightly due to the growth in special forms of trading which offsets expenditure growth.

5.14 Comparison goods spending is forecast to increase by +58.4% between 2024 and 2036, increasing from £764.43 million in 2024 to £1,218.37 million in 2041, as shown in Table 3 (Appendix 4).

5.15 Food and beverage spending is forecast to increase by +22.8% between 2024 and 2041, increasing from £442.43 million in 2024 to £543.20 million in 2041, as shown in Table 3 (Appendix 5).

Growth in Turnover densities

5.16 Experian's Retail Planner Briefing Note 21 - February 2024 indicates comparison goods retail sales floorspace is expected to reduce its average sales density by -1.1% during 2024 and 2025 but will grow in the medium term (+2.6% per annum during 2026 to 2030), and longer term (+2.6% per annum beyond 2030). These forecast increases have been adopted and will absorb much of the future expenditure growth. These growth rates are relatively high compared with historic forecasts but are consistent with the likely high increase in online/home shopping through retail businesses.

5.17 For convenience goods retail, Experian indicates a -0.1% decline in sales densities during 2024 and 2025 but will grow in the medium term (+0.2% per annum during 2026 to 2030) and +0.1% per annum thereafter.

5.18 For leisure facilities, including food/beverage floorspace, Experian indicates a -0.8% decline in sales densities during 2024 and 2025; a small average increase of 0.5% per annum during 2026 to 2030; and 0.2% growth per annum in sales densities thereafter.

Base year market shares

5.19 The turnover of facilities within Braintree District is estimated based on the market shares or penetration rates. To assess the capacity for new floorspace, penetration rates have been estimated for shopping and food/beverage facilities based on a household shopper survey undertaken in June 2024.

5.20 The market shares for convenience goods and comparison goods shopping are shown in Table 4 in Appendix 3 and Table 4 in Appendix 4, respectively. The market shares for food and beverage expenditure are shown in Table 4 in Appendix 5.

5.21 The results of the household shopper survey regarding main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The market shares in Table 4 in Appendix 3 are a combined rate for both main and top up shopping based on a 70:30 split. The split between last main trip and other main trip is 50:20. These splits are based on Lichfields' experience and is widely accepted in retail studies of this kind.

Table 5.1 Food and grocery trip retention in Braintree District (% of all trips in each zone)

Zone	Main last trip	Main other trip	Top-up	Combined market share*
1 - Braintree	96.5	94.7	92.6	**95.0**
2 - Rural West	19.5	19.5	17.0	**18.8**
3 - Witham	68.6	67.9	72.9	**69.7**
4 - Halstead	60.7	53.5	87.6	**67.4**
5 - Rural North	1.0	4.2	8.5	**3.8**

Source: NEMS household survey results June 2024
* weighted average based on a 50:20:30 split between 'main last'/'main other'/top-up shopping

5.22 Braintree District attracts retains a relatively high share of convenience goods shopping trips in study area Zones 1 – Braintree, Zone 3 – Witham and Zone 4 - Halstead, but a low market share in Zone 2 – Rural West and Zone 5 – Rural North. Zone 2 includes Greta

Dunmow and Zone 4 includes Haverhill. The District's market shares are lower in the rural parts of the District and the areas closer to Chelmsford and Colchester.

5.23 These figures indicate that most residents undertake their food and grocery shopping close to where they live albeit predominantly by car for main food shopping trips. The household survey results and distribution of food stores within and surrounding the study area suggest there may be limited potential for Braintree District's to increase its market share of convenience goods expenditure in the future.

5.24 The market shares for comparison goods shopping in Table 4, Appendix 4 are based on a weighted average for each comparison goods category included within the household survey e.g. clothing/footwear, electrical, furniture, floorcoverings, DIY and health and beauty products. The survey results suggest lower levels of comparison goods expenditure retention for all goods categories within the study area zones, as shown in Table 5.2. The market shares are also higher in study area Zones 1 – Braintree, Zone 3 – Witham and Zone 4 - Halstead and much lower in the rural zones, but much lower than the retention for convenience goods retailing. The outflow of expenditure to larger shopping destinations in Chelmsford and Colchester is relatively high across all zones.

Table 5.2 Non-food comparison trip retention (% of all trips in each zone – excluding internet shopping)

Zone	Clothing footwear	Domestic electrical	Other electrical	Furniture floor-covering textile	DIY hardware garden	Health beauty	Books stationery	Toys hobbies pets	Other non-food	**Combined weighted Market share**
1 - Braintree	56.9	49.3	23.3	51.7	94.1	94.2	86.0	66.7	58.2	**57.1**
2 - Rural West	23.2	20.9	5.6	15.6	38.5	13.4	10.3	17.5	25.8	**17.5**
3 - Witham	29.2	12.0	1.5	11.5	35.2	68.1	54.6	43.6	48.1	**30.1**
4 - Halstead	33.5	25.5	17.3	22.8	56.6	60.9	58.4	42.9	28.5	**34.5**
5 - Rural North	11.3	2.3	1.5	0.0	3.4	0.9	0.5	2.8	1.7	**3.6**

Source: NEMS household survey results June 2024

5.25 The retention of comparison goods expenditure is generally lower for higher order goods e.g. electrical goods and furniture but higher for day-to-day goods e.g. DIY, health/ beauty and books/stationery.

5.26 The results of the household shopper survey regarding eating and drinking away from the home have been used to estimate existing food and beverage expenditure patterns. The market shares in Table 4 in Appendix 5 are a combined rate for both eating out and drinking at pubs/bars are based on an 80:20 split, based on Experian's local expenditure data. The survey results suggest reasonably high levels of expenditure retention within the study area, as shown in Table 5.3.

5.27 The survey results suggest lower levels of food/beverage expenditure market share than for convenience goods shopping, but higher than for comparison goods shopping. The

District's market shares are lower in the rural parts of the study area (Zones 2 and 5) and highest in Zone 1 - Braintree.

Table 5.3 Food and beverage trip retention in Braintree District (% of all trips in each zone)

Zone	Eating out	Drinking away from home	Combined market weighted share
1 - Braintree	80.9	85.0	**87.7**
2 - Rural West	31.5	14.4	**28.1**
3 - Witham	54.8	75.8	**59.0**
4 - Halstead	47.7	81.3	**54.4**
5 - Rural North	20.0	23.4	**20.7**

Source: NEMS household survey results June 2024.

Capacity for convenience goods retail floorspace

5.28 Based on the market shares calculated from the June 2024 household survey results, available convenience goods expenditure attracted to facilities in the District in 2024 is shown in Table 5 in Appendix 3. This expenditure has been projected forward to 2031, 2036 and 2041, and is summarised in Table 11 Appendix 3. Convenience goods expenditure available to facilities in the District is expected to increase from £359.12 million in 2024 to £373.33 million in 2041. This increase is due to population growth. A breakdown for facilities in the District is set out in Table 5.4.

Table 5.4 Convenience goods base year turnover in 2024 (household survey based turnover)

	Turnover £M
Braintree	139.16
Great Notley	42.04
Witham	97.38
Halstead	50.60
Other Braintree District	29.94
Total	**359.12**

Source: Table 10 in Appendix 3.

5.29 The benchmark turnover of the main food stores in the District is calculated in Table 9 in Appendix 3. The benchmark turnover is based on the sales area within each store and the respective company average sales densities. This turnover is not necessarily the actual turnover of the store, but it provides a useful benchmark to assess how well existing facilities are trading.

5.30 The combined benchmark turnover of convenience goods sales floorspace in the District is estimated to be £372.56 million. These estimates suggest food stores in the District are trading satisfactorily but may on average be slightly under-trading by about 3.6%.

5.31 Table 10 in Appendix 3 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus/deficit expenditure that may be available for new development in the future.

5.32 The deficit/surplus expenditure projections are converted into floorspace estimates in Table 11 in Appendix 3 based on a combined approximate company average sales density of

£12,000 per sq.m net of the main food store operators. The results are summarised in Table 5.5.

Table 5.5 Convenience goods floorspace capacity (sq.m gross) - cumulative

Zone	2031	2036	2041
Braintree	-1,342	-1,174	-904
Great Notley	64	122	212
Witham	-1,066	-970	-826
Halstead	531	566	624
Other Braintree District	-15	15	62
Total	**-1,828**	**-1,441**	**-832**

Source: Table 11 in Appendix 3.

Qualitative need

5.33 Food store provision in the District is set out in Table 9 in Appendix 3. Convenience goods sales floorspace totals about 30,500 sq.m net. Collectively the designated centres in the District have 56 convenience goods outlets including food stores operated by multiple retailers and smaller independent shops.

5.34 Main shopping trips traditionally are generally made once a week or less often, although recently households have increasing undertaken top-up shopping trips. The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large food stores are the usual destination for these types of bulk food shopping trips.

5.35 There are six food superstores of over 2,200 sq.m net in the District, including three Tesco stores and a Sainsbury's store in Braintree/Great Notley. Witham has large Tesco and Morrison's stores.

5.36 The Co-op (1,644 sq.m net), Lidl (1,296 sq.m net) and Sainsbury's (999 sq.m net) stores in Halstead are smaller but still provides a good range and choice of products. are also suitable for main and bulk food shopping.

5.37 The discount sector is well represented in the District with Lild and B&M Bargains stores in Braintree, Lidl and Aldi stores in Witham and a Lidl store in Halstead.

5.38 These large food stores are concentrated in the three main towns. Large stores are supported by a selection of smaller stores suitable for top-up food and grocery shopping including 15 Co-op stores, four Morrison's Daily stores, three Marks & Spencer Simply Food stores and two Iceland stores.

5.39 Residents across the District have good access to a choice of food stores and there are no obvious areas of deficiency in food store provision, which reflects the relatively high expenditure retention rates highlighted in Table 5.1 in Zones 1, 3 and 4.

Capacity for comparison goods floorspace

5.40 Available comparison goods expenditure has been projected to 2031, 2036 and 2041 and is summarised in Table 10 in Appendix 4. Comparison goods expenditure available to facilities in the District is expected to increase from £252.24 million in 2024 to £401.7 million in 2041. A breakdown of turnover for facilities in each zone is set out in Table 5.6, along with the estimated the average sales density.

Table 5.6 Comparison goods base year turnover in 2024 (household survey based turnover)

Zone	Turnover £M	Sales floorspace sq.m net	Average sales density £ per sq.m net *
Braintree	138.14	23,223	5,948
Great Notley	5.75	577	9,965
Braintree Village shopping centre	46.96	14,000	3,354
Witham	31.16	6,978	4,465
Halstead	24.25	4,479	5,414
Other Braintree District	5.98	n/a	n/a
Total	**252.24**	**n/a**	**4,999**

Source: Tables 9 and 10 in Appendix 4. * weighted average excluding 'Other Braintree District'.

5.41 Trading levels vary across the District. The average sales density for the main destinations is about £5,000 per sq.m net. Experian suggest the average sales density for comparison goods sales floorspace in the UK was £4,436 per sq.m net in 2022 (source: Retail Planner Briefing Note 21 – Figure 3b), which suggests facilities in the District area trading satisfactorily above the national average.

5.42 The relatively high sales density for Braintree including Braintree Retail Park reflects the stronger presence of national multiples and the town destination's higher position in the shopping hierarchy. The smaller centres generally have a lower trading density, which reflects the predominance of independent traders. Comparison goods sales floorspace in the District appears to be trading satisfactorily in difficult market conditions.

5.43 Table 10 in Appendix 4 subtracts the turnover of existing floorspace including an allowance for growth in turnover densities. The projections suggest future growth in available expenditure will be partially offset by expected growth in turnover densities i.e. existing retail businesses will absorb expenditure growth. This assumption is consistent with Experian's projected growth in non-store sales taken by retail businesses. The growth in retail operator's turnover densities will in part be fuelled by online sales and click and collect (from stores or collection points), which will not directly affect the need for additional retail sales floorspace. The deductions already made for special forms of trading (SFT) only relate to non-store sales through non-retail businesses.

5.44 In 2031 there is a projected small expenditure surplus of +£2.87 million, increasing to £15.66 million in 2041. These projections suggest growth in turnover densities will absorb most of the future expenditure growth. The expenditure projections have been converted into floorspace estimates Table 10 in Appendix 4. The results are summarised in Table 5.7.

Table 5.7 Comparison goods floorspace capacity (sq.m gross) - cumulative

	2031	2036	2041
Braintree	334	664	1,419
Great Notley	15	30	64
Braintree Village shopping centre	132	244	496
Witham	70	127	269
Halstead	19	51	148
Other Braintree District	8	17	42
Total	**578**	**1,133**	**2,438**

Source: Table 10 in Appendix 4.

Qualitative need

5.45 Braintree town centre and Braintree Village/Braintree Retail Park continue to be the main comparison shopping destinations within the District. All centres in Braintree District are smaller than larger centres surrounding the District, in particular Ipswich, Colchester, Chelmsford, Basildon, Harlow and Bishop's Stortford which are accessible to residents within the District and have a more extensive range of multiple retailers. Collectively town, district and local centres in the District have 160 comparison goods outlets. This includes a mix of national multiples and small independent shops. Braintree Village provides a further 66 comparison goods outlets.

5.46 The centre audits in Appendix 2 indicate that Braintree's three town centres have a slightly lower proportion of comparison retail units compared to the national average.

5.47 Braintree town centre (61 comparison shops) has representation in all but one of Goad's 14 comparison goods categories. However, there is generally a limited choice of outlets within some specialist categories. Braintree town centre has a high proportion of charity/second-hand shops. The clothing and footwear sector is under-represented in the town centre with only 7 shops. Braintree Village has over 40 fashion related outlets.

5.48 Witham (40 outlets) and Halstead (39 outlets) have a reasonable range of comparison retail outlets with most Goad categories represented but the choice of outlets in most categories is limited. Most of the comparison goods outlets in these town centres are small independent retailers. The range and choice of comparison goods shops in the local centres is very limited.

5.49 Braintree Retail Park has a reasonable provision of retail warehouse outlets including B&Q, Carpetright, Dreams, Halfords, Marks & Spencer, Next, Pets at Home, Sports Direct and TK Maxx.

5.50 Collectively these destinations provide a reasonable number of comparison goods outlets, but the leakage of higher order comparison goods expenditure to larger shopping destinations in Chelmsford and Colchester is relatively high.

5.51 Overall, the accessibility for residents in the District to a range and choice of comparison goods shopping destinations is reasonable, taking into account the overlapping catchment areas with larger shopping destinations in Chelmsford and Colchester.

Capacity for food/beverage floorspace

5.52 Available food and beverage expenditure has been projected forward to 2031, 2036 and 2041, and is summarised in Table 9 in Appendix 5. The amount of expenditure attracted to the District is expected to increase from £238.69 million in 2024 to £292.38 million in 2041. A breakdown of turnover for facilities in each destination is set out in Table 5.8, along with the estimated the average sales density.

Table 5.8 Food and beverage base year turnover in 2024 (household survey based turnover)

	Turnover £M	Floorspace sq.m gross	Average sales density £ per sq.m gross *
Braintree	89.05	10,536	8,452
Great Notley	8.73	n/a	n/a
Braintree Village shopping centre	9.48	2,000	4,740
Witham	36.17	6,900	5,242
Halstead	17.93	5,010	3,579
Other Braintree District	77.34	n/a	n/a
Total	**238.69**		**6,243**

Source: Tables 9 and 10 in Appendix 5. * weighted average excluding 'Great Notley' and 'Other Braintree District'

5.53 There are 160 food and beverage outlets in town, district and local centres in the District, plus a further 14 outlets at Braintree Village/Braintree Retail and Leisure Park. The combined turnover of destinations in the District is £238.69 million. These estimates suggest an average turnover of over £6,000 per sq.m gross. Based on Lichfields' recent experience this is a satisfactory level of trading for food/beverage outlets, which equates to an average of about £1 million per outlet.

5.54 Table 9 in Appendix 5 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure available for new development. In 2031 there is an expenditure surplus of +£16.23 million. Continued population and expenditure growth creates an expenditure surplus of £42.23 million in 2041. Floorspace capacity projections are shown in Table 10 in Appendix 5 and summarised in Table 5.9 below.

Table 5.9 Food and beverage floorspace capacity (sq.m gross) - cumulative

Zone	2031	2036	2041
Braintree	1,005	1,769	2,589
Great Notley	91	163	244
Braintree Village shopping centre	100	179	264
Witham	404	697	999
Halstead	179	316	459
Other Braintree District	853	1,488	2,161
Total	**2,632**	**4,613**	**6,716**

Source: Table 10 in Appendix 5.

Qualitative need

5.55 Collectively the town, district and local centres and Braintree Village and Braintree Retail and Leisure Park in the District have over 170 food/beverage outlets. These destinations provide a good range and choice of outlets.

5.56 The analysis of centres in Appendix 2 indicates Witham town centre has a high proportion (15% of all units) of restaurant/cafés compared with the UK average (10.7%). Braintree (8.7%) and Halstead (9.7%) town centres are slightly below the national average.

5.57 The provision of pubs/bars is higher than the national average (5.1% of units) in Halstead town centre (6.3%) and Witham town centre (5.9%), but below average in Braintree town centre (3%).

5.58 The provision of hot food takeaways is above the UK average (6.4%) in all three town centres, ranging from 8% in Braintree town centre to 8.5% in Witham town centre.

5.59 Braintree Village and Braintree Retail and Leisure Park has a strong provision of food and beverage outlets. Overall, the accessibility for residents in the District to a range and choice of food/beverage outlets is good.

Operator space requirements

5.60 The Requirements List publishes potential space requirements for multiple retail and food/beverage operators. The current (August 2024) list of operators whose published information suggest they may have space requirements in Braintree District are shown in Tables 5.10 to 5.12. There were no listed requirements for district or local centres in the District. Most of the published relate to Braintree town rather than Halstead or Witham.

Table 5.10 Convenience goods retail operator space requirements in Braintree District

Operator	Floorspace in sq.ft (min/max)	Town
Lidl – discount food store	18,000 – 26,500	Braintree

Source: The Requirements List (August 2024)

Table 5.11 Comparison goods retail operator space requirements in Braintree District

Operator	Floorspace in sq.ft (min/max)	Town
Age UK – charity shop	1,400 – 5,000	Braintree
Bensons – beds	4,000 – 8,000	Braintree
Bodycare – beauty supply store	3,000 – 5,000	Braintree
Calendar Club	800 - 2,100	Braintree
Deichmann – shoes and sportswear	4,000 – 6,000	Braintree
Mencap – charity shop	1,200 – 2,000	Halstead
PDSA – charity shop	1,000 – 2,000	Braintree
Pets Corner – pet supplies	1,200 – 2,500	Braintree
Poundstretcher - value retail	6,000 – 30,000	Witham
Sleep8 – beds	2,000 – 8,000	Braintree
Topps Tiles – tiles and flooring	2,500 – 8,000	Braintree

Source: The Requirements List (August 2024)

Table 5.12 Food/Beverage operator space requirements in Braintree District

Operator	Floorspace in sq.ft (min/max)	Town
Amber Taverns – pubs	2,000	Braintree
Ember Inns – pubs	-	Braintree
Innkeepers Lodge – pub/restaurant/ hotel	-	Braintree
KFC – fast food restaurant/takeaway	1,200 – 2,500	Witham
McMullen & Sons – pubs and brewery	2,500 – 5,000	Braintree
Papa Johns – pizzas	1,000	Witham
Pizza Hut Delivery – pizzas	650 – 2,100	Witham
Taco Bell – fast food	1,800 – 2,500	Braintree

Source: The Requirements List (August 2024)

5.61 In total, there are 20 retail and food/beverage operators listed as having potential space requirements in Braintree District with a potential total floorspace requirement of at least 51,950 sq.ft gross (or 4,820 sq.m), as follows:

- Convenience goods retailers 1 (18,000 sq.ft gross)
- Comparison goods retailers 11 (27,100 sq.ft gross)
- Food/beverage operators 8 (9,150 sq.ft gross).

5.62 Some of these listed requirements are likely to be generic interest in centres of a similar size across the region rather than specifically in Braintree District, therefore the total number of requirements and amount of floorspace outlined below should be treated with caution.

6.0 Leisure, entertainment and cultural uses

Introduction

6.1 This section assesses the need for other main town centre uses including commercial leisure, entertainment and cultural uses i.e. cinema/multiplex, tenpin bowling, bingo, theatres, nightclubs and private health and fitness clubs. Main town centre uses, as defined within the NPPF glossary, exclude less intensive sports and recreation uses such as swimming pools, sports halls and sports pitches, and therefore the need for these uses has not been assessed in this study.

6.2 Residents in the District have a reasonable range of commercial leisure and entertainment uses within the authority area and within neighbouring authorities. Braintree Retail and Leisure Park is the main concentration of facilities in the District with a Cineworld multiplex, Braintree Swimming & Fitness and NAMCO Funscape amusement centre.

6.3 Access to facilities within Chelmsford, Colchester and Central London also provides additional opportunities for leisure, entertainment and cultural trips.

Leisure, entertainment and cultural expenditure

6.4 Experian's projections and local expenditure data for the household study area indicates the resident population generates £81.11 million in 2024 (an average of about £305 person) on selected cultural, recreational and sporting services, including:

- cinema admissions £4.31 million
- live entertainment i.e. theatre/concerts/shows £11.69 million
- museums, theme parks, houses and gardens £11.35 million
- admissions to clubs, dances, discos, bingo £5.52 million
- other miscellaneous entertainment £11.91 million
- subscriptions to sports and social clubs £17.61 million
- leisure class fees £18.72 million.

6.5 Leisure, entertainment and cultural expenditure has been projected to 2031, 2036 and 2041 adopting Experian's recommended leisure expenditure growth rates (Retail Planning Briefing Note 21 – February 2024). Taking population growth into account leisure expenditure is projected to increase by 22.8% from £81.11 million in 2024 to £99.59 million in 2041.

6.6 Not all leisure/cultural expenditure from study area residents is spent in Braintree District Braintree. The household survey results have been adopted to estimate the household participation rates and the retention of leisure trips within the study area, as shown in Table 6.1. Around 11% of households do not participate in any of the eleven leisure activities explored by the household survey.

6.7 The participation and retention rates vary significantly for each leisure activity. Many residents travel outside the study area e.g. to Chelmsford, Colchester and Central London for many leisure activities. Braintree's highest share is for trips to ten-pin bowling (72.4%), cinemas (64.9%) and gyms health and fitness facilities (63.7%). The District's market share is relatively low for theatres (5.1%), trampoline parks (7.1%) and museum/art galleries. These results suggest households are prepared to travel further for these activities.

6.8 London/West End is the most significant out-of-district location for several leisure/ entertainment activities, attracting 52% of assessed households to its theatres, and attracting significant portions of visits to nightclubs/live music venues (24%) and museums/art galleries (46%). Colchester, Chelmsford, Cambridge and Bury St. Edmunds are also popular destinations for households in the study area.

Table 6.1 Leisure, entertainment and cultural participation and trip retention (% of households in the study area)

Activity	% study area households participating	% trips attracted to Braintree District
Cinema	45.9	64.9
Theatre	35.8	5.1
Nightclubs / live music venues	16.4	19.1
Bingo	3.8	29.7
Gyms / health and fitness club	27.8	63.7
Tenpin bowling / gaming	23.1	72.4
Indoor / soft play	14.7	23.0
Trampoline parks	12.9	7.1
Museums / art galleries	28.4	9.0

Source: NEMS household survey results June 2024

6.9 The household survey results and Experian's expenditure figures suggest facilities in Braintree District attract about 40% of leisure, entertainment and cultural expenditure within the study area, which is about £32.4 million in 2024. This retained leisure expenditure is projected to increase to £35.6 million in 2031; £37.7 million in 2036 and £39.8 million in 2041.

6.10 Based on Lichfields' experience, leisure floorspace normally trades on average around £2,500 per sq.m gross, which is projected to increase to £2,568 per sq.m gross in 2031; £2,594 per sq.m in 2036 and then to £2,620 per sq.m in 2041, based on Experian's projected growth in leisure sales densities.

6.11 If leisure/cultural expenditure attracted to the District increased by £3.2 million by 2031 and then £5.3 million in 2036 and £7.4 million in 2041, as indicated above, then this additional expenditure could support about 1,200 sq.m gross of new commercial leisure and cultural floorspace by 2031, increasing to about 2,000 sq.m gross by 2036 and then 2,800 sq.m gross by 2041.

6.12 This analysis provides a broad brush global floorspace capacity analysis and assumes Braintree District will continue to retain, as a minimum, a relatively low (40%) proportion of leisure expenditure within the study area. A more detailed sector by sector assessment is set out in the remainder of this section.

Cinemas

6.13 Cinema admissions in the UK reached a peak of 1.6 billion trips in 1946, but the number of trips declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early

1980s dropping to only 54 million trips in 1984 but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 176 million in 2019 (Source: British Film Institute). Cinema trips did not increase significantly between 2002 and 2019, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The national average visitation rate was about 2.6 trips per person per annum, before the Covid crisis. The number of trips during the Covid-19 crisis reduced significantly. The latest 2023 figures indicate 123.6 million cinema trips were made in the UK (about 1.8 trips per person), still 30% below pre-Covid levels (176 million).

6.14 The cinema assessment for Braintree District assumes trip levels comparable with the UK average at both post and pre-Covid levels, i.e. an average of between 1.8 and 2.6 trips per person per annum.

6.15 The UK Film Distributors' Association identities 977 cinema facilities with 4,578 screens in the UK in 2023. Lichfields' national CINeSCOPE model assesses the provision of cinema screens against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average (based on pre-Covid trips rates) was about 38,000 cinema trips per annum for each cinema screen.

6.16 The study area population is 265,760 in 2024, which based on the national averages above, would generate between 478,000 to 691,000 cinema trips. These trips can theoretically support between 12 and 18 cinema screens. However, not all cinema trips will be attracted to facilities in the District. Cinemas surrounding the District attract a significant number of trips, therefore the District's theoretical capacity will be much lower.

6.17 There are only two cinema facilities in the District, at Braintree and Halstead. Braintree's Cineworld has 12 screens with 1,852 seats, and the Empire cinema at Halstead (which is also a theatre venue) is a single screen facility with 280 seats. The household survey results suggest the District attracts a reasonably high market share of cinema trips (64.9% of households in the study area) compared to facilities outside of Braintree District. This 64.9% market share equates to 310,000 to 448,000 cinema trips. Based on the pre-Covid national average (38,000 trips per screen) these trips can support between 8.2 to 11.8 screens. The high end of this range could support 11.8 screens, which is just below existing provision within the District (13 screens).

6.18 Population within the study area is projected to increase from 265,760 to 281,123 by 2041. The population estimate at 2041 is projected to generate between 506,000 to 731,000 cinema trips, based on the national averages above (1.8 to 2.6 trips per person per annum). Based on the current Braintree market share (64.9%) of cinema trips the District could attract between 328,000 to 474,000 trips in 2041. The high end of this range is still below existing provision within the District (13 screens), which suggest no additional demand for cinema screens. Furthermore, existing cinema provision within the surrounding areas may limit operator demand for a new facility in the study area and the longer-term impact of Covid-19 and growth in home viewing on the number of cinema trips is likely to reduce this theoretical capacity if the average visitation rate does not return to the pre-Covid UK average of 2.6 trips per person.

Theatres, nightclubs, live music and other cultural activities

6.19 The household survey results indicate about 36% of respondents in the study area visit theatres. Over 24% visit museums/art galleries and about 16% visit nightclubs/live music venues.

6.20 The UK Theatre and Society of London Theatres (SOLT) indicated their member organisations (over 200) pre-Covid presented nearly 63,000 performances attracting over 34.35 million tickets visits, generating ticket revenue of £1.28 billion in 2018. The average ticket revenue per venue was £5.7 million. The UK average attendance per performance was 545.

6.21 Experian's local expenditure data indicates the Braintree study area generates £11.69 million on live theatre, concerts and shows in 2024, which is projected to increase to £14.35 million in 2041. Based on the average ticket revenue per venue (£5.7 million) the Braintree study area population currently generates theoretical demand for two venues.

6.22 The District has two theatre venues i.e. the Bocking Arts Theatre in Braintree and The Empire in Halstead (also a cinema), which is consistent with the theoretical demand generated by the study area households shown above. Expenditure growth up to 2041 is +£2.66 million, which may not be sufficient to support an additional venue.

6.23 The nightclub sector has struggled in recent years and has been significantly affected by the Covid pandemic. Even before Covid-19, IBISWorld (providers of global industry research) suggested these venues have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing.

6.24 The household survey results suggest only 16.4% of households visit nightclubs/music venues and of these participating households 19.1% are attracted to facilities in the District.

6.25 Experian suggests leisure expenditure on admissions to clubs, dances, discos etc is £5.52 million in 2024 within the Braintree study area, which is projected to grow by only +£1.25 million up to 2041. This relatively low level of expenditure growth and good access to nightclub/live music venues in Central London and Colchester are likely to limit demand for additional facilities in the District.

6.26 Experian's local expenditure data indicates the Braintree study area generates £11.35 million on museums, theme parks, houses and gardens in 2024, which is projected to increase to £13.95 million in 2041, an additional £2.59 million.

6.27 The household survey results suggest around 28% of households visit museums/ art galleries, but only 9% of these participating households are attracted to facilities in Braintree District, visiting primarily the Braintree District Museum. London is the most significant out-of-district destination.

6.28 The analysis above suggests there is no clear qualitative or quantitative need for additional theatre, music/nightclub or cultural provision. However, there may be potential to increase the District's market share and attract more demand from tourist visitors if provision is improved.

Health and fitness clubs

6.29 The 2019 State of the UK Fitness Industry Report revealed that the health and fitness industry was continuing to grow pre-Covid. The latest 2022 report suggests the market value is now around 2018 levels. In 2019 there were more than 10.4 million fitness members in the UK and the industry was worth £5 billion, with a participation rate of 15.6%. The number of members dropped to 9.9 million in 2022, with a participation rate of 14.6% compared with 15.6% in 2019. The number of clubs reduced by 176. The household survey results indicate 30.2% of households visit health and fitness gyms, which is higher than the national average participation rate of just over 15%.

6.30 The Sport England/Active Places data indicates that there are 15 registered health and fitness facilities in the District, with 895 fitness stations, as shown in Table 5.2.

Table 6.2 Health and fitness facilities in Braintree District

Facility	Number of fitness stations	Type of access
Anytime Fitness (Witham)	200	Registered Members
Bannatyne Health Club (Braintree)	93	Registered Members
Benton Hall Golf And Country Club	60	Registered Members
Braintree Sport & Health Club	60	Registered Members
Braintree Swimming & Fitness	30	Pay and Play
Colchester Institute (Braintree Campus)	8	Private Use
Complete Health & Fitness	70	Pay and Play
DS Fitness Experience Ltd (Witham)	50	Registered Members
Earls Colne Recreation Club	8	Pay and Play
Fitness Factory Gym (Witham)	17	Registered Members
Halstead Leisure Centre	42	Registered Members
Hedingham School, Halstead	14	Private Use
Honywood Community Science School, Coggeshall	12	Private Use
Notley Sports Centre	13	Registered Members
Prested Hall Hotel & Sports Club	32	Registered Members
Rare Fitness, Braintree	125	Registered Members
The Essex Golf & Country Club	50	Registered Members
Witham Leisure Centre	45	Pay and Play
Total	**929**	

Source: Sport England 2024.

6.31 The current population in the Braintree study area is 265,760. The household survey results suggest the District attracts 63.7% of gym trips in the study area, equating to a catchment population of about 169,000 in 2024. Based on this current estimated catchment population (169,000) there is an average of 5.5 fitness stations per 1,000 people.

6.32 Experian's local expenditure data indicates the Braintree study area generates £36.33 million on subscriptions to sports/social clubs and leisure class fees, which is projected to increase to £44.6 million in 2041. Facilities in Braintree District would attract about £23.1 million, based on the 63.7% market share, which equate to about £24,900 per fitness station in 2024. Expenditure growth between 2024 to 2041, based on a constant market share of 63.7%, generates an additional £5.3 million, which could support 213 additional fitness stations (based on one fitness station per £24,900).

6.33 An alternative approach has been adopted based on the regional average. Within the East of England region there are 813 Sport England registered health and fitness facilities with 51,021 fitness stations (average of 63 stations per facility). Based on the region's population of 6,468,415 in 2024, this existing provision equates to about 7.9 registered fitness stations per 1,000 people in the Region. These figures suggest there is lower provision of fitness stations per capita than the regional average, which may suggest an under-provision of facilities and/or lower participation rates in the Braintree study area.

6.34 Braintree District's estimated catchment population (169,000) would generate demand for 1,335 fitness stations, based on this regional average. These figures suggest the District has a shortfall of 406 fitness stations, increasing to 485 fitness stations by 2041.

6.35 The potential capacity for 213 additional fitness stations by 2041 should be view as a minimum requirement, which could support two large or three medium sized health and fitness facilities in the District.

6.36 The Requirements List suggests David Lloyd Clubs and Anytime Fitness has published requirements for new facilities (4,000 – 6,000 sq.ft and 3,500 to 8,000 sq.ft respectively) in Braintree.

Tenpin bowling and other indoor leisure innovations

6.37 Repurposed space in town centres has provided new opportunities for new leisure innovations. Vacated premises have been reconfigured and reused for trampolines, climbing, indoor golf, escape rooms etc. These and other innovations are likely to continue in the future because landlords will adopt a flexible approach to respond to arising opportunities.

6.38 The household survey results indicate 23.1% of households visit ten-pin bowling/ gaming facilities and 72.4% of these trips are attracted to Braintree District, i.e. to NAMCO Funscape at Braintree Retail & Leisure Park.

6.39 Other tenpin bowling destination mentioned by household survey respondents were:

- Tenpin, Cambridge (7%)
- Chelmsford City Bowl (5%)
- Bury Bowl, Bury St Edmunds (3%)
- Maldon Lane (3%).

6.40 The Braintree study area's future 2041 population (281,123) can theoretically support 23 lanes, based on the national average of one lane per 12,000 people. The District's 72.4% market share of trips suggests theoretical demand for 17 lanes. NAMCO Funscape in

Braintree has 20 lanes, which suggests there is no demand for additional lanes in the District up to 2041.

6.41 Indoor trampoline centres are a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce in 2014.

6.42 Trampoline centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts for all ages and abilities, as well as an arcade and party rooms.

6.43 The household survey results indicate less than 13% of households in the study area visit trampoline centres and about 15% visit indoor soft play facilities. Trampoline destinations mentioned by households participating in this activity were as follows:

- AirHop Adventure Park, Chelmsford (61%)
- AirHop Adventure Park, Colchester (15%)

6.44 This existing provision in Colchester and Chelmsford and the relatively low participation rate suggest a large trampoline facility in Braintree District may not be viable.

6.45 The household survey results indicate 14.7% of households visit indoor soft play facilities, but only 23% of these trips are attracted to Braintree District, e.g. to Party World of Play in Braintree and Pickles Playhouse in Witham.

6.46 There may be potential scope for further trampoline and indoor play provision in the District, but these innovations are still evolving and its potential for continued growth is unclear. Participation levels based on the household survey are relatively low in comparison to other leisure activities. The strategy for the District should be flexible to respond to any emerging demand from leisure operators.

Bingo, games of chance and gambling

6.47 Gala (now Buzz Bingo) and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in online gambling has, and will continue to affect this sector.

6.48 The Gambling Commission indicates there are 646 bingo facilities in Great Britain (2020) and 156 casinos. This equates to approximately one bingo facility per 75,000 adults, and one casino per 330,000 adults.

6.49 The household survey results indicate 3.8% of respondents in the study area visit bingo facilities, lower than the UK average participation rates of around 5%. Less than 30% of trips generated are attracted to the District, and as there are no full-time facilities within

Braintree. The main bingo destination, attracting more than half the participating households, was Colchester, including the Buzz Bingo.

6.50 The adult population in the Braintree study area (about 207,000 in 2024) is theoretically capable of supporting just under three bingo facilities but much less than one casino, based on the UK averages. Considering the study area's relatively low participation rate (3.8%) there may be theoretical scope for two bingo facilities in the study area. There is theoretical scope for a bingo facility in Braintree District. However, the continued growth in online bingo and gambling and provision in surrounding authority areas are likely to restrict operator demand in the District.

Conclusions on commercial leisure and other town uses

6.51 The leisure, entertainment and cultural sectors are fragmented and innovative. There are many activities that could be promoted to attract more leisure trips to the District e.g. live music, nightclubs, museums, bingo and indoor play. The analysis suggests the scope for some traditional leisure activities often found in town centres may be limited e.g. cinemas and theatres, but new emerging leisure activities such as escape rooms and virtual golf centres should provide more potential. The representation of these emerging uses is likely to increase. Given the fragmented nature of these sectors it is difficult to precisely quantify the potential demand for these uses over the next 15 years.

6.52 In global terms future expenditure growth could support new commercial leisure and cultural floorspace (cumulative) in the District of:

- about 1,200 sq.m by 2031;
- about 2,000 sq.m by 2036; increasing to
- about 2,800 sq.m by 2041.

6.53 This additional floorspace could include:

- two large or three medium sized health and fitness facilities (about 200 fitness stations in total);
- a bingo hall (subject to operator demand and trends in online gambling); and
- new leisure innovations e.g. soft play, indoor climbing, escape rooms, virtual sport activities; and
- small scale tourist attractions/cultural facilities.

6.54 The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities. The opportunities to reoccupy vacated retail space should be considered.

7.0 Accommodating growth and change

National guidance

7.1 For planning policies, local authorities are required to support the role of town centres and the three main areas policies should focus on:

- defining a network and hierarchy of centres, allowing them to grow and diversify;
- defining the extent of centre boundaries and primary shopping areas, making clear the uses permitted in these locations; and
- allocating a range of suitable sites to meet the scale and type of development needed for at least ten years ahead, sites should be allocated consistent with the sequential approach i.e. town centre, then edge-of-centre followed by accessible out-of-centre sites.

7.2 The NPPF acknowledges the rapid changes that are affecting town centres and diversification is key to their long-term vitality and viability. Accordingly, planning policies should clarify the range of uses permitted, as part of a positive strategy for the future of each centre.

7.3 The NPPF's presumption in favour of sustainable development remains. For plan-making this means that plans should positively seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change. It is widely accepted that very long-term projections have inherent uncertainties. In response to these uncertainties, local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses over a minimum ten-year period reflects the complexities in bringing forward town centre development sites. In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required.

7.4 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will need to be assessed against the sequential and impact tests.

7.5 The sequential test in the NPPF indicates main town centre uses should locate in town centres, then in edge-of-centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out-of-centre sites be considered (para. 91). When considering edge-of-centre and out-of-centre proposals, preference should be given to accessible sites that are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge-of-centre sites are fully explored (para. 92).

7.6 The NPPF states that local planning authorities should require an impact assessment for applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq.m (para. 94). The locally set thresholds in Braintree District are addressed later in this section. Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact, it should be refused (para. 95).

7.7 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with online shopping. Online shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centres has become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.

7.8 As set out in Section 2, the Use Classes Order (UCO) was significantly amended in September 2020 and changes to permitted development rights were introduced in August 2021. These changes will have significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses. The implications of these changes are addressed later.

7.9 The expenditure projections in this study exclude home shopping made through non-retail businesses, because special forms of trading (sales via the internet, mail order, stalls and markets) is subtracted from the expenditure projections. The assessment adopts Experian's latest information and projections and assumes that special forms of trading will increase in the future, including the growth of internet shopping.

Floorspace capacity projections

7.10 The adopted Braintree Local Plan (2013 to 2033) Section 2 Policy LPP 9 (Retailing and Regeneration) sets out retail floorspace capacity projections for comparison and convenience goods retail and food and beverage provision during the plan period to 2033, as follows:

- convenience goods retail - 2,927 sq.m gross
- comparison goods retail - 10,315 sq.m gross
- food and beverage - 4,506 sq.m gross

7.11 These floorspace projections were based on the Braintree Retail Study 2018 Update and cover a 15-year period up to 2033. These floorspace projections now need to be updated and rolled forward. The new projections to 2041 are significantly lower than the previous projections for comparison and convenience goods retail, primarily due to lower expenditure forecasts and higher deductions for special forms of trading (SFT).

7.12 The updated assessment of the potential for new retail, food/beverage floorspace in this report suggests there is a more modest need for new development in the District. Tables 7.1, 7.2 and 7.3 below summarise the new floorspace requirements in the District up to 2031, 2036 and 2041 (cumulative).

7.13 These projections assume facilities in Braintree District will maintain their market share of expenditure in the future. This approach recognises that additional development within the District could help to increase the area's market share, but this increase will be counter-balanced by development within competing centres. The household survey results indicate the District retains a reasonable level of expenditure and a significant increase in market shares is unrealistic and unnecessary. Conversely a significant reduction in market share could undermine the vitality and viability of town centres. A balanced and sustainable approach has been adopted.

Table 7.1 Retail and food/beverage floorspace projections up to 2031 (sq.m gross) – cumulative

	Convenience goods retail	Comparison goods retail	Food/ beverage	Total
Braintree	-1,342	334	1,005	**-3**
Great Notley	64	15	91	**170**
Braintree Village	-	132	100	**232**
Witham	-1,066	70	404	**-592**
Halstead	531	19	179	**729**
Other Braintree District	-15	8	853	**846**
Total	**-1,827**	**577**	**2,632**	**1,382**

Table 7.2 Retail and food/beverage floorspace projections up to 2036 (sq.m gross) – cumulative

	Convenience goods retail	Comparison goods retail	Food/ beverage	Total
Braintree	-1,174	664	1,769	**1,259**
Great Notley	122	30	163	**315**
Braintree Village	-	244	179	**423**
Witham	-970	127	697	**-146**
Halstead	566	51	316	**933**
Other Braintree District	15	17	1,488	**1,520**
Total	**-1,440**	**1,133**	**4,613**	**4,306**

Table 7.3 Retail and food/beverage floorspace projections up to 2041 (sq.m gross) – cumulative

	Convenience goods retail	Comparison goods retail	Food/ beverage	Total
Braintree	-904	1,419	2,589	**3,104**
Great Notley	212	64	264	**540**
Braintree Village	-	496	244	**740**
Witham	-826	269	999	**442**
Halstead	624	148	459	**1,231**
Other Braintree District	62	42	2,161	**2,265**
Total	**-832**	**2,437**	**6,716**	**8,321**

Source: Table 11 in Appendix 3, 4 and 5.

7.14 Table 7.2 indicates there is a combined projected requirement for 4,306 sq.m gross of retail and food/beverage floorspace in 2036. The combined floorspace requirement increases to 8,321 sq.m gross in 2041. The availability of existing vacant floorspace, commitments, proposals and development allocations to accommodate these floorspace requirement needs to be considered, particularly up to 2036.

7.15 The adopted Local Plan indicated (paragraph 4.34) projected comparison and convenience retail growth was concentrated in Braintree town centre, Braintree Village and Braintree

Retail Park. Witham and Halstead had no projected convenience goods retail growth. The updated projections, rolled forward to 2041, continue to show growth in comparison goods retail is concentrated in Braintree town centre and Braintree Village, but there is no longer projected growth for convenience goods retail in these locations. There remains no growth for convenience goods retail in Witham, but there is some limit residual growth in Halstead.

7.16 As indicated in paragraph 4.35 of the adopted Local Plan town centres should be the primary location for main town centre uses and retail development.

7.17 Growth in the food/beverage and commercial leisure, entertainment and culture sectors provide an opportunity to enhance the evening and night-time economy in centres, including the repurposing of vacant retail floorspace. The new Local Plan should recognise and foster this potential, albeit recognising potential negative environmental and amenity effects and considering appropriate management strategies and mitigation measures.

7.18 Development plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through the expansion of centres. The NPPF indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres. To accommodate growth, local planning authorities should keep town centre boundaries under review.

7.19 The floorspace projections should be viewed as broad guidance and a starting point for the review of site-specific allocations and development management policies. The projections in Tables 7.1 to 7.3 do not take account all extant planning permissions or pipeline proposals or the reoccupation of vacant floorspace.

Vacant shop premises

7.20 The need assessment in this report assumes that existing retail and service floorspace can, on average, increase its turnover to sales floorspace densities. In addition to the growth in sales densities, vacant shop premises could help to accommodate future growth. The existing stock of premises should have a key role to play in accommodating any projected growth, particularly in the short to medium term.

7.21 In July 2024 there were 72 vacant shop units in the town, district and local centres, an average vacancy rate of 10.6%, which is below the pre-Covid UK average (12.4%) and significantly below the current UK average (14.8%). Vacant floorspace in the three main town centre totals about 6,900 sq.m gross.

7.22 The floorspace capacity projections suggest the priority in the short-term will be the reoccupation of vacant shop units. The floorspace projections suggest there is a need to retain the existing stock of shop premises within centres to accommodate future growth.

7.23 As a strategic objective, it is reasonable to assume the shop vacancy rate could reduce to between 5% to 8% across the District's centres. Based on Lichfields' experience 5% is a reasonable minimum vacancy rate, allowing for the natural churn of occupiers in successful town centres. The pre-2008 financial crisis UK average shop vacancy rate was around 8% which could be an appropriate maximum vacancy rate in the future.

7.24 A reduction to 8% in the shop vacancy rate could theoretically accommodate at least 1,500 sq.m gross of new uses in Braintree, Halstead and Witham town centres. A higher reduction to a 5% shop vacancy rate could accommodate around 3,600 sq.m gross.

7.25 There are eight vacant units in Braintree Village, a vacancy rate of 9.9%. A reduction to a 5% or 8% vacancy rate would result in the re-occupation of 2 or 4 units respectively. Based on an average of 200 sq.m per reoccupied units would be between 400 to 800 sq.m.

7.26 There are 14 vacant units within the local centres in the District, a vacancy rate of 12.5%. A reduction to a 5% or 8% vacancy rate would result in the re-occupation of 8 or 5 units respectively. Based on an average of 100 sq.m per reoccupied units would be between 500 to 800 sq.m.

7.27 Based on the 5% to 8% vacancy rate target, reoccupied vacant floorspace in centres could be distributed as follows:

- Braintree town centre 900 to 1,700 sq.m gross
- Halstead town centre 500 to 1,100 sq.m gross
- Witham town centre 100 to 800 sq.m gross
- Braintree Village shopping centre 400 to 800 sq.m gross
- Local centres 500 to 800 sq.m gross

7.28 The combined short to medium term floorspace projections to 2031 is just under 1,400 sq.m gross as shown in Table 7.1. A reduction in the shop vacancy rate to 8% (amounting to about 2,400 sq.m gross) would be more than sufficient to accommodate this global floorspace projection.

7.29 The longer-term floorspace projections to 2036 and 2041 suggest there will be an increasing quantitative need to increase the combined amount of retail and food/beverage floorspace, over and above the potential reoccupation of vacant floorspace. The potential reduction in vacancy rate to 8% (2,400 sq.m gross) could accommodate over half of the global floorspace projection up to 2036 (4,306 sq.m gross). A higher reduction in vacancy rate to 5% (5,200 sq.m gross) could accommodate all of the floorspace projection up to 2036, but just over 60% of the projection to 2041 (8,321 sq.m gross).

7.30 The residual floorspace projection, assuming the lower 8% reduction in shop vacancy rate, is about 1,900 sq.m gross, increasing to 5,900 sq.m gross in 2041. As assessed in Section 6, there could be an additional requirement for about 2,800 sq.m gross of leisure use in the District in 2041, which is not included in Tables 7.1 to 7.3.

Local Plan allocations

7.31 Policy LPP9 of the Braintree District Local Plan indicates improvements and regeneration of the town centres will be promoted and four locations were identified to meet the identified need for additional retailing and other main town centre uses. In line with this approach, Policy LPP15 identifies retail site allocations, as follows:

- land at Manor Street, Braintree
- Sainsbury’s store and Car Park, Tofts Walk, Braintree

- Tesco store, Car Park and Pound End Mill, New Street, Braintree
- Newlands Precinct, Braintree

7.32 These site allocations were assessed in previous studies.

Braintree and Braintree Village shopping centre

7.33 The combined floorspace capacity projection for Braintree town centre is 1,259 sq.m gross in 2036 increasing to 3,104 sq.m gross in 2041. The 2041 projection for Braintree Village is 740 sq.m gross respectively in 2041. The combined projection up to 2041 is 3,844 sq.m gross.

7.34 As indicated above, vacant shop units could accommodate between 900 to 1,700 sq.m gross in Braintree town centre. Vacant units in Braintree Village could accommodate between 400 to 800 sq.m gross. This vacant floorspace could be sufficient to accommodate combined growth up to and beyond 2036. The residual floorspace projection up to 2041, allowing for the reoccupation of vacant units is between 1,300 to 2,500 sq.m gross.

7.35 The Manor Street/Victoria Street site allocation is located to the rear of the Town Hall and library and has recently been redeveloped including a Travelodge hotel, NHS surgery and relocated bus interchange.

7.36 The Sainsbury's store and car park were previously identified as having potential for part redevelopment of the food store to provide new units on Drury Lane and potential expansion to the existing food store for replacement and/or additional floorspace. Potential for an additional floorspace of 2,000 sq.m gross was identified. The Tesco store and car park were previously identified as having potential for redevelopment of the food store to provide a replacement or smaller modern store and additional comparison units on Market Street. Potential for an additional floorspace of 2,500 to 5,000 sq.m gross was identified.

7.37 If delivered these two town opportunities could provide additional comparison retail, food/beverage or leisure floorspace. With the reoccupation of vacant shop units (1,300 to 2,500 sq.m gross), the residual floorspace capacity projection up to 2041 for Braintree and Braintree Village could be accommodated.

7.38 Adopted Local Plan Policy LPP14 identifies land for retail warehousing on the proposals map. This policy would allow the intensification of retail warehouse development at Braintree Retail Park, without the need for a sequential or impact assessment. A large area for further retail warehousing is allocated to the south of Millenium Way.

7.39 These out-of-centre allocations for additional retail warehousing do not appear to be needed due to the much lower comparison goods floorspace projections. The Council should consider removing these allocations and Policy LPP14.

Halstead Town Centre

7.40 The combined floorspace capacity projection for Halstead is 933 sq.m gross in 2036 increasing to 1,231 sq.m gross in 2041. As indicated above, vacant shop units could accommodate between 500 to 1,100 sq.m gross. Vacant floorspace could be sufficient to accommodate growth up to and beyond 2036. The residual floorspace projection up to 2041, allowing for the reoccupation of vacant units is between 100 to 700 sq.m gross.

7.41 This small and long-term residual capacity suggests a major development allocation does not need to be identified in Halstead.

Witham Town Centre

7.42 The combined floorspace capacity projection for Witham is negative up to 2036. The projection to 2041 is 442 sq.m gross in 2041. As indicated above, vacant shop units could accommodate between 100 to 800 sq.m gross. Vacant floorspace could be sufficient to accommodate growth up to 2041.

7.43 The new local centre at Maltings Lane has been partly implemented, including an Aldi food store and a large public house/family restaurant. The designated Local Centre boundary also includes undeveloped land identified for non-food retail (3,710 sq.m gross – 2,412 sq.m net) in the masterplan. If implemented this non-food retail would exceed the comparison goods retail floorspace projection for Witham up to 2041 (269 sq.m gross) and would absorb retail capacity from other parts of the District.

7.44 The Newland Street site allocation in Witham town centre includes the uncovered shopping centre and car park to the rear. The centre was identified as being in need of refurbishments in previous studies. Redevelopment of extension of the centre was expected to provide up to 2,000 sq.m gross of additional floorspace. With the reoccupation of vacant shop units (100 to 800 sq.m gross), any residual floorspace capacity in Witham could be accommodated by the delivery of this allocation if needed in the long-term.

Great Notley District Centre

7.45 The combined floorspace capacity projection for Great Notley to 2041 is 540 sq.m gross. The Great Notley District Centre boundary includes the surface car parks. This area provides opportunities for intensification that could accommodate additional main town centre uses, as permitted by adopted Local Plan Policy LPP11.

Local centres

7.46 The combined floorspace capacity projection for other parts of the District is 1,520 sq.m gross in 2036 increasing to 2,265 sq.m gross in 2041. As indicated above, vacant shop units in local centres could accommodate between 500 to 800 sq.m gross. The residual floorspace projection up to 2041, allowing for the reoccupation of vacant units is between 1,500 to 1,800 sq.m gross. This long-term residual capacity could be redistributed to Braintree and Witham town centres to support development allocations. The residual capacity could also be accommodated on the undeveloped area of the new Local Centre at Maltings Lane, Witham.

7.47 Adopted Local Plan Policy LPP9 recognises new local centres may be necessary as part of Strategic Growth Locations. Part of the projected floorspace requirements should be directed towards major housing developments within the District to serve local needs and reduce the need to travel for day-to-day shops and services.

8.0 Policy implications

8.1 This Section sets out the implications for emerging policies within the new Local Plan.

Hierarchy of centres

8.2 In relation to town centres, the NPPF Annex 2 Glossary indicates:

"References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance."

8.3 The network of town centres is currently set out in the adopted Braintree Local Plan Policy LPP9, as follows:

- Town centres: Braintree, Witham and Halstead
- District Centre: Great Notley
- Local Centres: Coggeshall, Earls Colne, Hatfield Peverel, Kelvedon, Sible Hedingham and Maltings Lane, Witham.

8.4 These Town, District and Local Centre boundaries are clearly marked on the Local Plan Proposals Map. Continuing to identify the hierarchy of centres in the new Local Plan will be important in terms of:

1 ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;

2 directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and

3 identifying a viable role and strategy for each centre.

8.5 The analysis of centres in Section 4.0 and Appendix 2 indicates the current designation of centres and hierarchy are sound. Braintree is the largest town centres in the District, serving a district wide catchment area. Braintree town centre should continue to be identified as the main comparison good shopping destination and a focus for food/beverage and leisure. Halstead and Witham have an adequate retail and service offer for centres of their size. Both town centres should continue to provide the focus for retail and leisure development in their local areas, rather than a District wide catchment area.

8.6 The other centres should continue to be designated as Local Centres that will provide important local access to lower order retail and services for their communities. This will reduce the need for residents to travel.

8.7 Some of the smaller centres, i.e. Hatfield Peverel, Kelvedon and Sible Hedingham have limited facilities and may be under threat if shop/service closures occur in the future. Continued protection is needed for these Local Centres to support their continued role of providing local facilities to residents, within walking distance.

Impact and sequential tests

8.8 Local Plan Policy LPP9 relates to the development of town centre uses and these uses are directed primarily to the three main town centres.

8.9 The sequential test in Policy LPP9 is consistent with the NPPF and relates to all proposals for main town centre use. This policy suggests impact assessment will be required for main town centre uses not within a Town, District or Local Centre, subject to floorspace thresholds.

8.10 The impact test in Policy LPP9 is broadly consistent with the NPPF. However, the NPPF indicates the impact test only applies to retail and leisure uses, rather than all main town centre uses. Reference to main town centre uses in Policy LPP9 could be amended to refer to retail and leisure uses.

Impact threshold

8.11 The current local impact thresholds in Policy LPP9 of the adopted Local Plan are:

- 2,500 sq.m (gross) – Braintree Town Centre
- 1,500 sq.m (gross) – Halstead and Witham Town Centres
- 1,000 sq.m (gross) – Great Notley District Centre
- 500 sq.m (gross) – Local Centres
- 400 sq.m (gross) - Sudbury

8.12 These impact thresholds need to be reviewed to reflect current circumstances and the lower updated floorspace projections. The PPG provides guidance on setting locally appropriate thresholds, and indicates it will be important to consider:

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

8.13 The relatively low floorspace capacity projections set out in Tables 7.1, 7.2 and 7.3, along with higher shop vacancy levels and uncertainties about the post-cost of living crisis recovery suggest designated centres are now more vulnerable to out-of-centre developments. The current impact thresholds are relatively high considering the much lower updated floorspace projections e.g. the comparison goods floorspace capacity figures have reduced by over 75% and the convenience goods projections are now negative.

8.14 The Council should consider introducing a lower impact threshold of 1,000 sq.m gross in Braintree town centre. Elsewhere, a consistent lower impact threshold in line with the Sunday trading limit (up to 500 sq.m gross or 280 sq.m net sales) could be adopted to protect the vitality and viability of all other designated town, district and local centres for retail and leisure uses.

8.15 The level of detail required in the impact assessment will vary case-by-case and it is for the applicant to provide robust justification that their impact assessment is robust, appropriate and proportionate.

Implications of UCO changes for the impact and sequential tests

8.16 Retail and leisure uses previously related to use classes A1 to A5 and D2 leisure uses. Changes to the UCO may lead to confusion. For example, not all uses within the new Class E are retail or leisure uses, requiring an impact assessment i.e. offices and medical uses. Bearing in mind the potential for confusion arising from the UCO changes and for consistency with the NPPF, new Local Plan policies relating to the impact test should, as indicated above, refer to retail and leisure uses rather than Class E within the new UCO. The sequential test should continue to refer to all main town centre uses as described in the NPPF glossary.

Sequential test floorspace threshold

8.17 The NPPF does not refer to a minimum floorspace threshold where the sequential test will be applied to main town centre uses in the same way as the impact test. All main town centre uses regardless of scale are required to comply with the sequential test. However, the PPG suggests some certain main town centre uses have "particular market and locational requirements that mean they may only be accommodated in specific locations", but robust justification must be provided to satisfy the sequential test in this respect. This approach may allow smaller scale local facilities outside designated district and local centres to be provided in areas that may be poorly served and/or within mixed use development to provide facilities catering for the local needs of the development, without needing to consider the sequential test.

8.18 Policy LPP 9 could be amended in the new Local Plan to support small scale (below 200 sq.m gross) shops and services outside designated centres, where a particular market and locational requirement has been robustly justified.

Town centre and primary shopping area boundaries

8.19 The new Local Plan should continue to define clear boundaries for town, district and local centres on the Proposals Map. Designated centres should remain the expected focus for retail, leisure and other main town centre uses. The classification of centres within the hierarchy is important in identifying which centres are relevant in the search for sequential sites.

8.20 The continued identification of town, district and local centre boundaries and a primary shopping area (PSA) in Braintree, Halstead and Witham town centres are important when applying the sequential approach, to direct retail and other town centre uses to sustainable locations and determine whether a retail impact assessment is required. The NPPF continues to indicate that the first preference for retail uses should be the PSA.

8.21 The first preference for leisure and other non-retail main town centre uses is normally the wider defined town centre area, which usually includes the PSA and other parts of the town centre. The ability to focus new retail uses within the PSA, rather than the wider town centre area, has become more difficult with the introduction of the new Class E, which allows free movement to and from retail use and other town centre uses. The continued need for both a town centre boundary and a PSA area in the three town centres needs to be considered.

8.22 The area of search for sequential sites i.e. relevant centres will depend on the scale, nature and location of the proposed town centre uses and the catchment area they are likely to serve, should be considered on a case-by-case basis. As indicated above, some proposed main town centre uses may have market and locational requirements that cannot be met within designated centres. Where this requirement is suggested, robust justification must be provided by the applicant.

8.23 The relatively low retail floorspace capacity projections, vacant shop units and current development allocations suggest there is no need to extend centre boundaries to accommodate future growth. However, the floorspace projections suggest a small long-term under-supply of floorspace, that implies the contraction of most centre boundaries is also unnecessary. The expansion or contraction of centre boundaries should be considered on a centre-by-centre basis, as outlined below.

8.24 The contraction of centre or PSA boundaries is only likely to be appropriate where there is a concentration of non-town centre uses on the periphery of centres e.g. residential gaps in frontages or a concentration of vacant shop units.

Braintree Town Centre

8.25 The current town centre boundary for Braintree is relatively widely drawn, including surface car parks, civic uses, churches and offices. The PSA cover about a third of the total town centre area. The south side of South Street and the western end of Rayne Street are predominantly in residential uses and could be excluded from the town centre boundary.

8.26 The current PSA is tightly drawn around the primary and secondary shopping frontages, which include the main shopping streets of Braintree and includes George Yard Shopping Centre. No contraction or expansion of the designated PSA is considered necessary.

Halstead Town Centre

8.27 The Halstead town centre boundary is also relatively widely drawn. It includes the Co-op and Lild stores, car parks, church and woodland area. Factory Lane East and The Causeway are predominantly in residential uses and could be excluded from the town centre boundary. The woodland area to the east of the High Street, north of Factory Lane East and to the south of The Centre could also be excluded from the town centre boundary.

8.28 The current PSA is tightly drawn around the primary and secondary shopping frontages, which include the main shopping streets, Weavers Court and the Co-op store. No contraction or expansion of the designated PSA is considered necessary.

Witham Town Centre

8.29 Witham town centre boundary is more tightly drawn than the other town centres. The PSA covers about half of the total town centre area. The town centre boundary includes the Tesco superstore, car parks, theatre, offices and employment uses.

8.30 The current PSA is tightly drawn around the primary and secondary shopping frontages, but includes the Tesco surface car park. This car park could be excluded from the PSA. No other contraction or expansion of the designated town centre boundary or PSA is considered necessary.

Great Notley District Centre

8.31 Great Notley district centre boundary includes the Tesco superstore, petrol filling station and car park. It also includes The Square, public house and the community hall. Within this area there could be potential for intensification of town centre uses, if required. The second has no PSA or primary and secondary frontage designation. Given the scale and structure of the centre these designations are considered unnecessary. The centre boundary is appropriate of the application of the sequential and impact tests. No contraction or expansion of the designated centre boundary is considered necessary.

Local Centres

8.32 Local centre boundaries are clearly shown on the Proposals Map. Shops and services in these settlements are generally clustered in one distinct area. The local centre boundaries are relatively tightly drawn around these clusters in Coggeshall, Earls Colne and Sible Hedingham. In Hatfield Peverel and Kelvedon shops are more fragmented.

8.33 In Hatfield Peverel two separate areas are designated within the local centre boundary. There are two clusters on The Street about 200 metres apart. Both areas contain important local shops and services that should continue to be protected.

8.34 Kelvedon also has two separate areas designated within the local centre boundary. One cluster runs along the High Street for over 300 metres between The Chase and Grangewood Avenue. The second cluster is over 500 metres to the north at the High Street/ Station Road/Swan Street junction. These areas also contain important local shops and services that should continue to be protected.

8.35 No changes to the local centre boundaries are considered necessary.

Controlling the mix of uses

8.36 The ability to control the mix of uses within centres and designated frontages has changed significantly since 2020. Current and future market trends; the relatively low retail floorspace capacity projections; and changes to the NPPF and the UCO; indicate a flexible approach to shop frontage policies and the mix of uses within centres is required.

8.37 Policy LPP10 of the adopted Braintree Local Plan relates to the designated PSA, primary and secondary frontages. This policy seeks to maintain a balance between retail shops and non-retail town centre uses to secure the vitality and viability of the PSA. Class E commercial uses and local community uses (use classes F.1 and F.2) are permitted in the primary frontages. In the secondary frontages a wider range of uses is permitted i.e. sui generis uses including pubs/drinking establishments, hot food takeaways and cinema, concert halls and music venues. Policy LPP11 effectively adopts the same approach in Great Notley District Centre to the secondary shopping frontages in the three town centres.

8.38 As indicated earlier, the town centre boundaries are relatively widely drawn. The primary frontages only cover a small core area of each town centre. The secondary frontages and areas beyond the PSA provide a significant degree of flexibility for a broad mix of town centre uses.

8.39 The approach in the adopted Braintree Local Plan is balanced and recognises the need to maintain and enhance each centre's retail role, as well as introducing new non-retail uses including activities in the early evening and night-time economy. It also recognises there is still a need to retain and encourage new retail uses previously categorised as Class A1 uses within the town and district centres.

8.40 The future policy approach will continue to be restricted by the recent changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR). In view of the changes to the UCO and PDR, the introduction of more restrictive policies would be unsound and unimplementable for existing premises. However, the introduction of Article 4 directions can be considered e.g. to remove permitted changes of use from Class E to residential (Class MA). However, Article 4 directions cannot prevent movement within the same use class i.e., new Class E. The loss of retail uses to other sub-categories of Class E cannot be controlled. In some circumstances the introduction of restrictive shop frontage policies or Article 4 directions could be inappropriate e.g. in areas with a high level of vacancies and where an increase in vacant units could harm the vitality and viability of the centre.

8.41 An alternative approach in relation to non-Class E uses including pubs, bars, hot food takeaways and other sui generis uses could be criteria-based policies e.g. relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. Sui generis uses that can still be controlled by policy, and this not affected by changes to the Use Classes Order or Permitted Development Rights Other non-Class E uses at ground floor level can be controlled within the designated frontages.

8.42 Notwithstanding the reduced controls, the mix of uses within use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required i.e., where there is a change of use requiring planning permission, redevelopment or new development is proposed, in the same way planning conditions/legal agreements were previously used to control movement usually permitted within the former Class A uses. This approach could be used to control the mix of ground floor uses on development site allocations.

8.43 The new Local Plan should continue to designate a PSA, primary and secondary frontages in the three town centres to protect the retail function of the area and encourage a balanced mix of uses.

9.0 Conclusions and recommendations

9.1 This section draws together the analysis set out in previous sections and provides strategic recommendations for Braintree District. It explores how the identified growth and change across the District could be accommodated and the future role of the town centres.

Meeting Braintree District's needs

9.2 When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability. The combined floorspace projections for retail and food/beverage floorspace in 2031, 2036 and 2041 are summarised and rounded in Tables 8.1 and 8.2.

Table 9.1 Combined retail and food/beverage floorspace requirements (sq.m gross) - cumulative

	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food /beverage (sq.m gross)	Total (sq.m gross)
By 2031	-1,827	577	2,632	**1,382**
By 2036	-1,440	1,133	4,613	**4,306**
By 2041	-832	2,437	6,716	**8,321**

Table 9.2 Combined floorspace requirements by location (sq.m gross) - cumulative

	By 2031	By 2036	By 2041
Braintree (incl. Braintree Village)	229	1,682	3,844
Great Notley	170	315	540
Witham	-592	-146	442
Halstead	729	933	1,231
Other Braintree District	846	1,520	2,265
Total	**1,382**	**4,306**	**8,321**

9.3 The leisure expenditure projections indicate there may be potential to accommodate an additional 2,000 sq.m gross of commercial leisure and cultural floorspace by 2036, increasing to 2,800 sq.m gross by 2041, which could include:

- two large or three medium sized health and fitness facilities (about 200 fitness stations);
- a bingo hall (subject to operator demand and trends in online gambling); and
- new leisure innovations e.g. soft play, indoor climbing, escape rooms, virtual sport activities; and
- small scale tourist attractions/cultural facilities.

9.4 Long-term floorspace capacity forecasts beyond 2036 years are susceptible to unforeseen circumstances. Growth forecasts for expenditure and turnover are particularly uncertain and need to be carefully monitored, including the continued growth in home/internet shopping. Long-term projections must be treated with caution and kept under review. The new Local Plan should seek to accommodate for at least ten years and potentially up to 2036.

9.5 The combined retail, food/beverage and leisure projection to 2036 is about 6,300 sq.m gross. Vacant town centre units can accommodate a significant proportion of this projection. Any residual growth could be absorbed by existing allocated sites in Braintree and Witham town centres and new local centres to serve Strategic Growth Locations.

9.6 The capacity projections suggest there is no pressing requirement to allocate sites for major retail/leisure development in out-of-centre locations to accommodate projected growth for the next ten years. The priority in the short to medium term will be the reoccupation of vacant shop units. Any longer-term residual need between 2031 to 2041 could be accommodated by existing development allocations. However, the future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities.

9.7 These out-of-centre allocations for additional retail warehousing do not appear to be needed. The Council should consider removing these allocations and Policy LPP14.

Future planning policy

Hierarchy of centres

9.8 Identifying the hierarchy of centres and the boundaries of centres in the new Local Plan is important in terms of:

- ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
- directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
- identifying a viable role and strategy for each centre.

9.9 The existing designation of town, district and local centres is appropriate and sound.

Impact and sequential tests

9.10 The new Local Plan should continue to set out the sequential and impact tests and which designated centres need to be considered. New Local Plan policies relating to the impact test should refer to retail and leisure uses rather than Class E within the new UCO. The sequential test should refer to all main town centre uses as described in the NPPF glossary. Office uses should only be required to comply with the sequential test but not the impact test. New Local Plan policies should reflect the NPPF wording.

9.11 The NPPF minimum threshold of 2,500 sq.m gross continues to be an inappropriate threshold for Braintree District because this scale of development would exceed the five-year retail and food beverage projections for all centres in the District. The Council should consider introducing a lower impact threshold of 1,000 sq.m gross in Braintree town centre. Elsewhere, a consistent lower impact threshold in line with the Sunday trading limit (up to 500 sq.m gross or 280 sq.m net sales) could be adopted to protect the vitality and viability of all other designated town, district and local centres for retail and leisure uses.

Town and local centre boundaries

9.12 The new Local Plan should continue to define clear boundaries for town and local centres on the Proposals Map and should remain the focus for retail, leisure and other main town centre uses. The continued need for both town centre boundaries and primary shopping areas (PSA) in the three town centres remains sound.

9.13 The relatively low retail floorspace capacity projections, suggest there is no need to extend centre or PSA boundaries to accommodate future growth, but the longer term projected under-supply of floorspace implies the contraction of most centre boundaries is also unnecessary. Some minor amendments to the town centre boundaries to exclude predominantly residential areas could be considered.

Controlling the mix of uses

9.14 The designated PSA, primary and secondary frontages should be retained. In the primary shopping frontages policy should continue to seek to retain and encourage retail and other Class E uses. Within other parts of the town centres current policy allows a wider range of main town centre uses including sui generis uses.

Future monitoring

9.15 The recommendations and projections within this study will assist the Council in reviewing development plan policies over the coming years and to assist future development management decisions. The study provides an overview of the potential need for further retail and leisure development in the medium and long-term up to 2041. Longer-term projections beyond 2036 are subject to uncertainty and forecasts will need to be amended to reflect emerging changes, as and when new information becomes available. These uncertainties include the longer-term implications of the Covid-19 and cost of living crisis that will need to be monitored. Longer-term projections after 2036 should be treated with caution and provide broad guidance only. Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

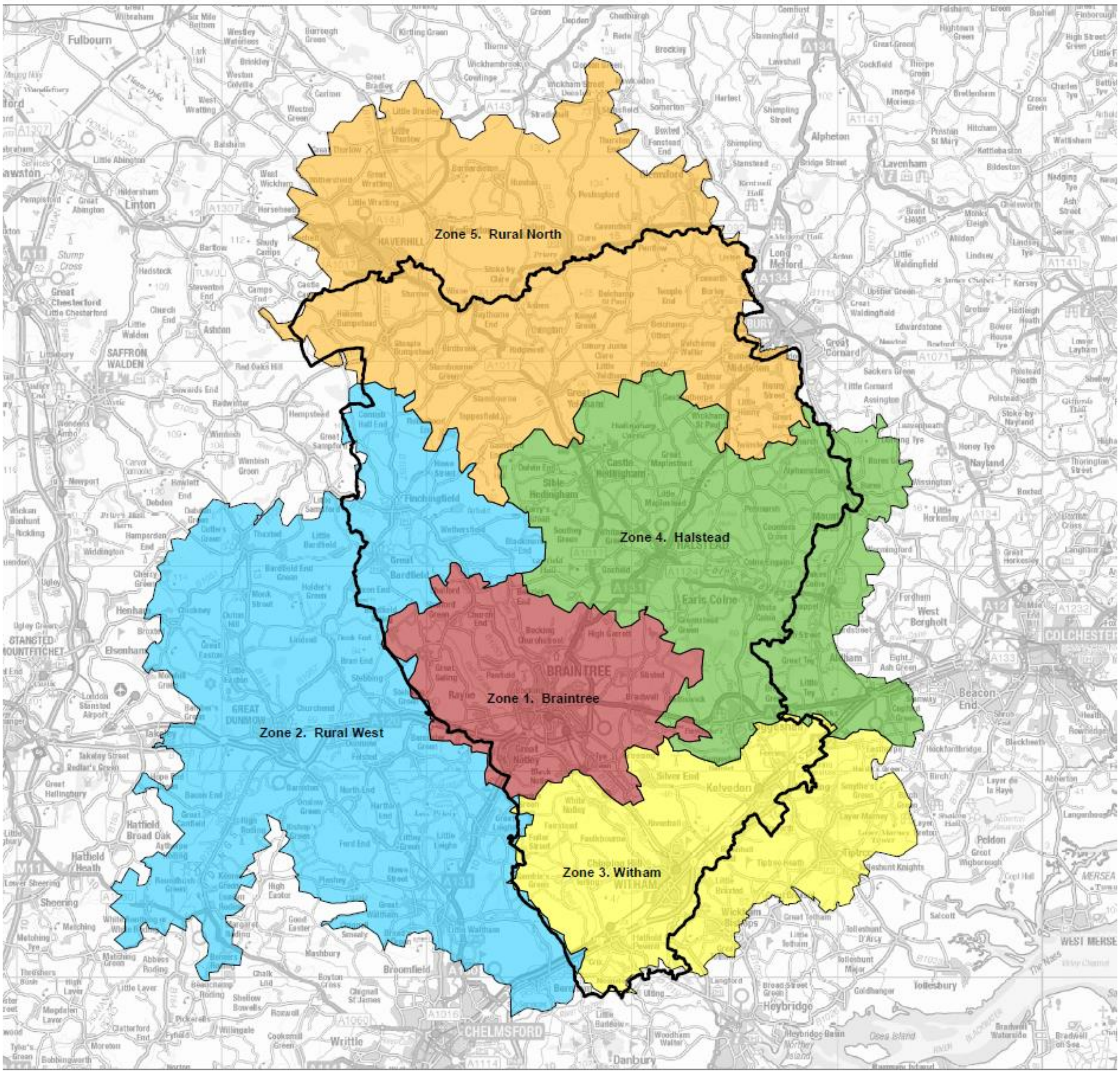
- population projections;
- local expenditure estimates (information from Experian or other recognised providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian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

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

Appendix 1 Study Area

Table 1 Study Area Zones

Zone	Postcode areas	Household survey sample
1. Braintree	CM7 1 CM7 2 CM7 3 CM7 5 CM7 9 CM77 6 CM77 7 CM77 8	170
2. Rural West	CM3 1 CM3 3 CM6 1 CM6 2 CM6 3 CM7 4	130
3. Witham	CM3 2 CM8 1 CM8 2 CM8 3 CO5 0 CO5 9	160
4. Halstead	CO6 1 CO6 2 CO8 5 CO9 1 CO9 2 CO9 3	110
5. Rural North	CB9 0 CB9 7 CB9 8 CB9 9 CO9 4 CO10 7 CO10 8	130

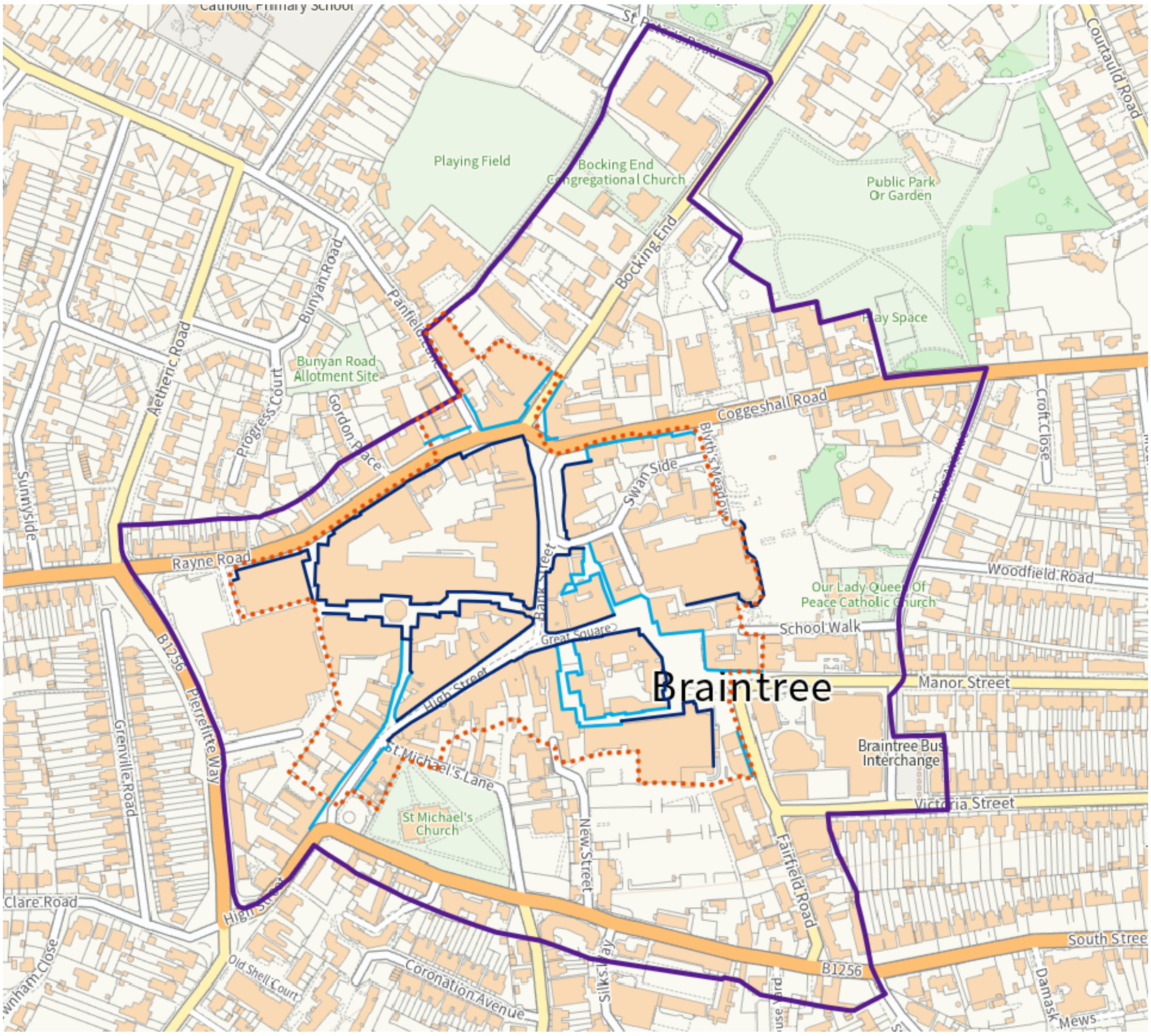

Zone 5. Rural North
Zone 4. Halstead
Zone 1. Braintree
Zone 2. Rural West
Zone 3. Witham

Appendix 2 Analysis of centres

BRAINTREE TOWN CENTRE

Braintree is located towards the south-west of Braintree District, approximately 17km north of Chelmsford and 24km west of Colchester. Braintree fulfils an administrative role for the District and is the largest out of the three designated town centres. It is the primary location for retail, office, leisure, community and cultural provision. In addition to its town centre facilities, Braintree benefits from other significant comparison shopping destinations – Braintree Village designer outlet centre and Braintree Retail Park, around 1.6km south-east of Braintree town centre. These destinations attract customers from a large catchment area.

Figure B1 Extract of proposals map – Braintree town centre



Source: Braintree District Local Plan 2013-2033

The Braintree District Local Plan 2013-2033 defines a Primary Shopping Area (PSA) (dotted orange outline) within Braintree's Town Centre (purple outline), shown in Figure B1 above. The centre has two main shopping centre arcades: George Yard and Phoenix. The primary shopping frontages (marked dark blue) include most of the frontages in the PSA. The secondary shopping frontage (marked light blue) covers the peripheral areas of the PSA. Within the PSA are four large anchor stores i.e. the Sainsbury's and Tesco stores serve as convenience superstores, and a Co-op department store and a B&M Bargains store. A substantial proportion of the town centre is also within a Conservation Area.

Mix of uses and vacancies

There are 263 retail and service units within Braintree town centre. The mix of uses is set out in Table B1, which is compared with the District and UK averages. There were 29 vacant units within the centre in July 2024, a vacancy rate of 11%, which is similar to the District average but below the UK average. The comparatively low vacancy rate suggests the supply of shop premises is broadly in line with operator demand. However, in 2014 and 2017 the vacancy rates were slightly lower, 9.3% and 8.5% respectively, which suggests the town centre has not fully recovered from the effects of the Covid-19 pandemic and cost of living crisis.

Table B1 Mix of retail and service uses – Braintree town centre

Type	Number of units	% units	District average (% units)	UK average (% units)
Convenience retail	21	8.0	8.3	9.8
Comparison retail	61	23.2	23.6	28.4
Financial/Professional	37	14.1	11.7	8.5
Restaurants/Cafés	23	8.7	10.3	10.7
Pubs/Bars	8	3.0	4.9	5.1
Hot food takeaways	21	8.0	8.4	6.4
Other non-retail services	63	24.0	22.2	16.3
Vacant	29	11.0	10.6	14.8
Total	**263**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey (July 2024) and Goad Plan UK averages (July 2024)

The composition mix of uses in Braintree is similar to the District averages but there are several notable differences to the national averages. The centre has a slightly lower proportion of comparison retail units compared with the rest of the District and much lower than the national average. Braintree has a higher proportion of financial/professional services as well as other non-retail services, slightly higher than the District averages but significantly higher than the national averages. A more detailed breakdown of comparison goods outlets and non-retail services are shown in Tables B2 and B3. In terms of food and beverage establishments, Braintree has slightly lower proportions of restaurants/ cafés and pubs/bars, but a higher proportion of hot food takeaways.

Braintree's comparison retail offer is varied, with all 14 Goad Plan shop categories represented, as shown in Table B2, with some categories having a reasonable choice of outlets. Consistent with national trends, the number of comparison retail units has declined since 2017, from 90 to 61 outlets. The most significant losses have been in clothing and footwear (12 to 7 units); DIY, hardware and homeware (6 to 1 units); china, glass and gifts (4 to 1 units); and toys, hobby, cycle and sports (9 to 5 units).

The proportion of charity and second-hand shops has risen, from 12.2% to 19.7%, and is substantially above the UK average. Other significant variations from the national averages include a lower provision of clothing/footwear; DIY/ hardware/homeware, china/glass/gifts and jewellers. There are higher levels of provision of chemists/drugstores/opticians; toys/hobby/cycle/sports and variety/department/ catalogue stores.

Table B2 Mix of comparison goods retail uses – Braintree town centre

Type	Number of units	% units	District average (% units)	UK average (% units)
Clothing and footwear	7	11.5	13.2	20.8
Furniture, carpets and textiles	6	9.8	5.9	7.4
Books, arts, cards and stationers	4	6.6	9.9	6.2
Electrical, music and photography	7	11.5	6.6	9.4
DIY, hardware and homeware	1	1.6	5.9	7.1
China, glass and gifts	1	1.6	1.3	5.8
Cars, motorcycles and accessories	0	0	0.7	1.3
Chemists, drugstores and opticians	10	16.4	17.8	12.1
Variety, department and catalogue	3	4.9	3.3	1.4
Florists, nurserymen and seedsmen	2	3.3	2.6	2.1
Toys, hobby, cycle and sports	5	8.2	5.9	5.5
Jewellers	2	3.3	3.9	5.1
Charity and second-hand shops	12	19.7	18.4	10.0
Other comparison goods retailers	1	1.6	4.6	5.7
Total	**61**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey (July 2024) and Goad Plan UK averages (July 2024)

Braintree has an extensive selection of non-retail services (152 outlets), with all categories reasonably well-represented, as shown in Table B3.

Table B3 Mix of non-retail service uses – Braintree town centre

Type	Number of units	% units	District average (% units)	UK average (% units)
Restaurant / café	23	18.6	20.8	25.1
Hot food takeaway	21	16.3	16.9	15.1
Public house / bar	8	6.2	9.8	11.9
Bank / other financial service	12	7.8	5.9	7.1
Betting shop / casino / amusement	4	3.1	2.7	3.6
Estate agent / valuer	16	11.6	11.3	7.3
Travel agent	4	3.1	2.1	1.4
Hairdresser / beauty parlour	40	31.0	28.5	27.1
Launderette / dry cleaner	3	2.3	2.1	1.5
Sub-total	**131**	**100.0**	**100.0**	**100.0**
Other non-retail services	21			
Total	**152**			

Source: Lichfields' land use survey (July 2024) and Goad Plan UK averages (July 2024)

The mix of service uses is similar to the national average. The key differences are Braintree's above-average provision of estate agents/valuers, travel agents and hairdressers/beauty parlours. Braintree has comparatively a low provision of restaurant/cafés and especially pubs/bars. Other non-retail service uses include a personal training centre, therapy centres, a pet grooming facility, repair shops, funeral directors and undertakers. The wide range and choice of services in Braintree reflects its dual shopping and day-to-day service role. The town centre also has the Braintree District Museum and Art Gallery, Braintree Library next to the Town Hall, and places of worship.

Braintree town centre has a reasonable number of national multiples, indicative of its position as the District's principal town centre, complemented by independent shops. The national multiple stores are shown in Table B4.

Table B4 Multiple retailers – Braintree town centre

Comparison		Convenience	Food and Beverage
B&M Bargains	F Hinds	Holland & Barrett	Costa
Barnardo's	New Look	Iceland	Greene King
Boots	Peacocks	Mace	Greggs
British Heart Foundation	Poundland	Sainsbury's	J D Wetherspoon's
Cancer Research UK	Savers	Tesco	Kaspa's Desserts
Card Factory	Shoe Zone		Papa John's
Cards Direct	Specsavers		Subway
CEX	Superdrug		
Claire's	The Works		
Co-Operative Home and Living	Vision Express		
	Vodafone		
EE	WHSmith		

Source: Lichfields' land use survey (July 2024)

Customer views

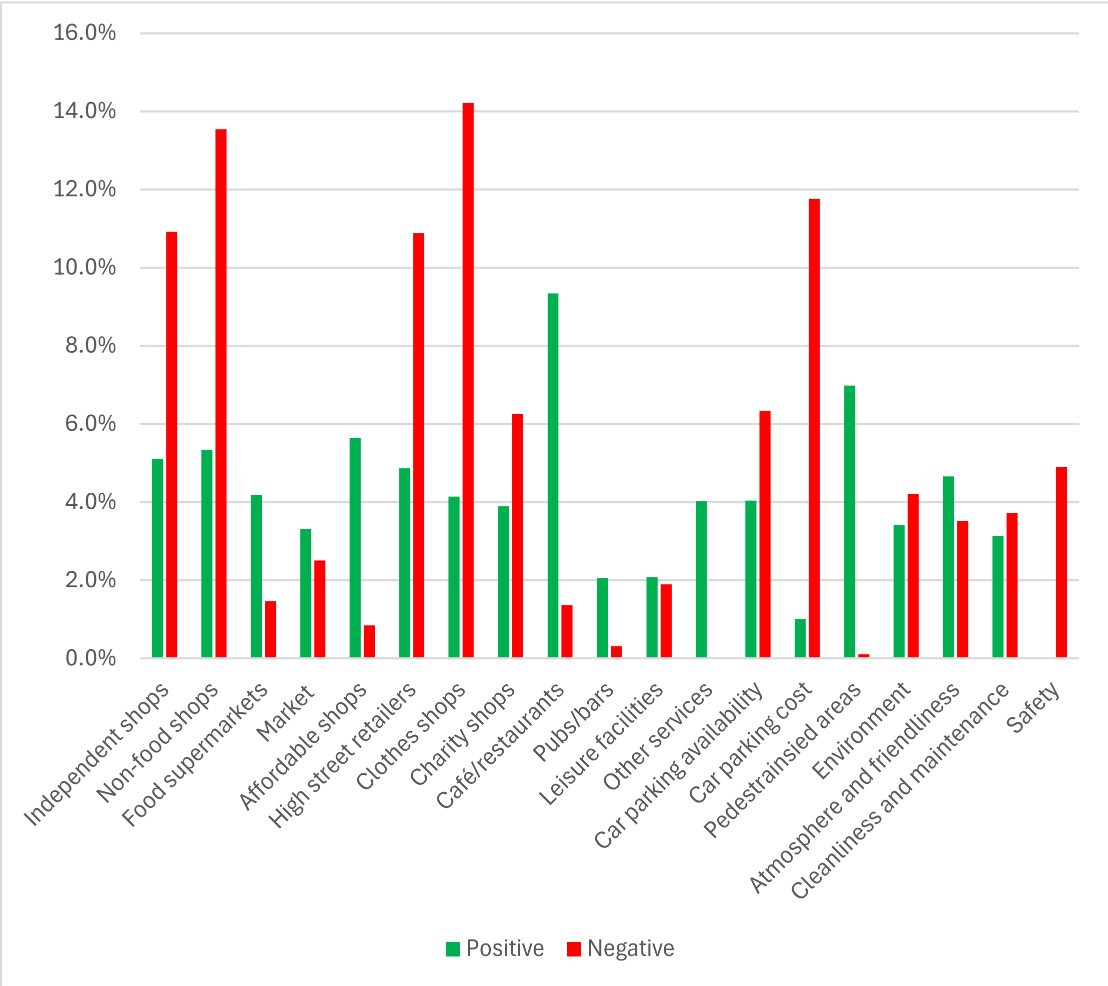
As part of the household survey, respondents across the study area were asked if they had used shop, services or leisure facilities in Braintree town centre in the last year. Around 53% of respondents in the study area had visited Braintree, the highest of all centres in the District. Of those who had used shops/services in Braintree, respondents were asked what they liked about the town centre and what improvements would make them visit more often. The main positive factors liked about Braintree town centre and the negative factors where improvements were suggested are compared in Figure B2 below.

The survey results show mixed opinions on Braintree's town centre. There were generally higher levels of dissatisfaction than satisfaction with regard to the range of non-food shops, clothes shops, high street retailers and independent shops. There were also higher levels of dissatisfaction with car parking (availability and cost) and safety. More respondents suggested there are too many charity shops compared with those suggesting they like the provision of charity shops.

Visitors were more satisfied with Braintree's affordability of shops, food supermarkets, cafés/restaurants, other non-retail services and pedestrianised areas. The environment, atmosphere and cleanliness had split levels of satisfaction and dissatisfaction.

Overall, the proximity of Braintree's town centre to home was the most liked attribute (17.2%), followed by cafés and restaurants and pedestrianised areas. The fourth most mentioned aspect of Braintree was that 'you can get everything you need there' (5.6%). The top two improvements suggested for Braintree were more/better clothes shops and non-food shops generally.

Figure B2 - Positive and negative factors visitors mentioned about Braintree town centre (% of all visitors)



Source: NEMS household survey (June 2024)

Customer activities and catchment area

The household survey results indicate about 54% of study area respondents had visited shops, services or leisure facilities in Braintree town centre during the last year, which was significantly higher than the next most popular centre, Halstead (25%). The majority of these visitors live in Zone 1 – Braintree but was also the most popular shopping destination in Zone 2 – rural west.

The average length of stay for households visiting Braintree town centre was 99 minutes, which was the highest in the District, but only slightly above Halstead (91 minutes) and Witham (84 minutes). About 8.2% of households indicated that they do most of their non-food shopping in Braintree town centre, significantly higher than Witham (4%) and Halstead (1.9%). Braintree Village (4.3%) and Braintree Retail Park (0.9%) were also major comparison-goods shopping destinations.

The breakdown of activities undertaken by visitors to Braintree town centre is shown and compared with the average for other centres in Table B5. The centre has a higher proportion undertaking non-food shopping and visiting banks/financial institutions reflecting its role as the biggest centre in the district. For other activities it is mostly consistent with the district average, with lower proportions undertaking food shopping, visiting cafes/pubs/restaurants, and undertaking leisure activities.

Table B5 Activities carried out by visitors to Braintree town centre (% of all visitors to each centre)

Activity	Braintree	Average for all centres
Shopping		
Non-food shopping	58.7	**53.1**
Food shopping	42.3	**46.4**
Window shop/browse	13.0	**13.8**
Visting the market	4.7	**3.2**
Leisure		
Go for a walk	0.4	**2.9**
Café/pub/restaurant	27.9	**29.3**
Leisure activity	4.4	**7.7**
Other services		
Banks/other financial institutions	17.0	**6.7**
Health facilities	9.8	**11.2**
Library	0.5	**1.2**
Getting petrol	0.2	**0.7**
Post office	3.3	**6.4**
Other service uses	10.7	**10.4**
Other activities		
Travelling to/from work	2.6	**2.2**
Education/school run	2.0	**2.7**
Visting family/friends	5.1	**6.8**

Source: NEMS household survey (June 2024) * percentages add to more than 100% due to multiple activities.

The retail capacity analysis suggests Braintree town centre has a comparison goods turnover of over £86 million in 2024, the highest of all destinations in the District. However, Braintree Village and Braintree Retail Park have a significant combined comparison goods turnover of £79 million. Collectively, the town centre and these destinations attract over 18% comparison goods expenditure generated by households in the study area. Braintree town centre attracts most (about 60%) of its trade from its local area (Zone 1 – Braintree) but also attracts a reasonable level of trade from three of the other five zones, indicating it has a District-wide shopping catchment area.

Rental levels

According to the Valuation Office Agency (VOA), Braintree has peak Zone A retail rental values of £450 per sq.m., the highest of all centres in the District. Within Braintree's PSA, values are highest at its primary frontage, with Bank Street ranging between £300-450 per sq.m., followed by George Yard shopping centre, with values between £296-378 per sq.m. The High Street has some variation, with rental values ranging from £166-315 per sq.m. Similarly, Great Square and Market Place range between £180-315 per sq.m. As would be expected, this variation relates to designations as primary and secondary frontage.

Rental values are lowest within the PSA's secondary frontage, including Market Street (£185 per sq.m); Little Square (£185 per sq.m); Coggeshall Road (£161-231 per sq.m) and the southwestern part of Bocking End (£230 per sq.m). Outside of the PSA, rental values range between £115-235 per sq.m. Higher rates are associated with proximity to the PSA.

Braintree has a good mix of shop properties ranging in cost, suitable for national multiples and small independent outlets.

Accessibility

Braintree Railway Station is located within walking distance, less than half a mile to the southeast of the town centre. This pedestrian route benefits from wide pavements and road crossings. There is a well-located bus stop adjacent to the station. Braintree is the terminus for the rail route to London Liverpool Street. Trains run every hour via Braintree Freeport, Witham, Chelmsford and London Stratford. There are some cycling facilities provided with a cycle lane on Bank Street / Coggeshall Road.

Pedestrian accessibility throughout Braintree's centre is generally good. Paving is generally wide and in good condition and the pedestrianisation of Market Place/Great Square provides pedestrian priority. There is good provision of signs and maps improving legibility.

Bus stops within Braintree's town centre are concentrated at its edge, on Rayne Road, Coggeshall Road, St Michael's Road, Fairfield Road, and the bus interchange between Manor Street and Victoria Street. The bus interchange benefits from well-maintained seating, shelters, and digital displays with live departure information. The interchange is within easy walking distance to the Market Place. Central stops have bus routes connecting to Stansted Airport (X20, 133), Halstead (38, 38A, 89, 370), Witham (38, 38A), Chelmsford (70, 170, 370), and Colchester (132, 320). There are also connections to smaller towns and villages including Great Yeldham (89), Sible Hedingham (223) Great Dunmow (X20), Black Notley (21), Great Notley (320), Marks Farm (30, 70, 170), Bocking (21, 38, 38A).

The centre is served by ample car parking at Sainsbury's, Tesco and B&M, with spaces also available at the White Hart Hotel. There are two Council-run car parks at George Yard and Victoria Square. The number of spaces and charges is set out below.

Table B6 Braintree town centre car parks

Car park	Spaces	Charges
Victoria Square	48 spaces, including 4 electric vehicle spaces.	Sunday £1.50 all day. Monday-Saturday 7am-7pm: up to 1 hour - £1.50; 1-3 hours - £2.80; 3-6 hours - £4.50; over 6 hours (to 7pm) - £7.00; overnight (after 7pm-7am) - £1.00.
George Yard Multi-Storey	715 spaces	Monday-Saturday 7am-7pm, and Sunday 8:30am-5pm: up to 1 hour - £1.50; 1-3 hours - £2.80; 3-6 hours - £4.50; over 6 hours - £7.00; overnight (7pm-7am) - £1.00.

Source: Braintree District Council

Braintree's layout and historic character have been successfully preserved. Braintree urban form provides natural pedestrian circuits including numerous side streets and courtyards, which provides a balance between complexity and legibility, adding interest and a pleasant, human-scale environment. This is most apparent at Little Square and Leather Lane, where a compact, well-utilised courtyard produces an inviting, enclosed vibrant space.

There is a clear hierarchy to the network of streets, with the main thoroughfares of Market Place, Great Square, High Street and sections of Bank Street pedestrianised to enable sufficient capacity for pedestrian flows. George Yard shopping centre is well connected to these main corridors with three linking streets. Central car parks are directly connected to the main shopping area, with no road crossings required. However, the general environment and condition of these more minor connecting streets are poorer, but their function as well-utilised links benefit the town centre's accessibility.

The centre is bound by the major roads of Rayne Road, Coggeshall Road, Pierrefitte Way, and St Michael's Road / South Street. Though pedestrian crossings are available at adequate intervals, the pedestrian environment in these areas is less amenable. Pedestrian flows align with the characteristics of each street. The more major roads are prioritised for cars, reflected in their lower concentration of both pedestrians and commercial units (Coggeshall Road, Bocking End, Rayne Road). These streets primarily host office, residential and leisure uses. The pedestrianisation of the centre has ensured that vehicular traffic does not deter pedestrian use. Pedestrian flow through the main central streets is consistent.

Of the household survey respondents who had visited Braintree town centre in the past year, respondents mentioned accessibility factors liked as follows: pedestrianised areas (7.0%); good layout/shops close together (4.6%); easy to find a parking space (4.0%); easy to get there on foot (2.8%); easy to get there by car (2.3%); cheap / free parking (1% / 0.4%) and good bus service (0.2%).

Survey respondents were also asked what improvements would make them visit Braintree centre more often. The most mentioned improvements relating to accessibility to the centre and mobility/movement around the centre were the suggestion that parking is made free (7.6%), more spaces available (4.9%), or cheaper (4.2%); easier to get there by bus (2.2%); more disabled parking spaces made available (1.4%), less traffic congestion and access (1.4%) and easier to get there by car (1.1%). Other minor factors included expanding the pedestrianised area, better parking signage, and better pavements. Overall, accessibility within Braintree is viewed positively – the layout and pedestrianised areas are viewed positively. Parking availability and cost were viewed more negatively.

Environment and ambience

Braintree is an attractive historic market town with some period buildings and interesting historical landmarks. The Conservation Area covers the centre except for George Yard Shopping Centre, and there are many listed buildings. Braintree's character benefits from heritage references throughout the centre. At Little Square a circular bench displays its window manufacturing industrial heritage, and at George Yard a blue plaque commemorates the original site of Crittall Windows works. Views of Braintree's characteristic water towers are occasionally visible, and at the west of the High Street, St Michael's Church is accompanied by a statue, square, and adjacent churchyard. Other key landmarks include the White Hart hotel, Tabor House, and the Swan Public House.

Landscaping contributes to the environment, most successfully at the upper portion of Bank Street and single trees forming a focal point at Little Square and the north-south portion of Market Street. Some trees along the High Street, Market Place and Great Square are yet to mature, and there are some empty planters. The varied architecture of the centre, with fairly consistent active frontages, outside café seating, and a broad range of town centre uses contributes to a generally vibrant environment. Some buildings along the main shopping streets of the High Street and Great Square are unattractive and showing signs of age. Investment has generally concentrated on improvements to the paving and pedestrian environment.

Market Place is a key focal point, linking the traditional High Street with the civic buildings on Fairfield Road, Braintree Museum on Manor Street, and transport connections at the nearby bus interchange. From this square there are views of key landmarks - the Town Hall and other buildings of interest such as the Library and Picture Palace (now Wetherspoons). Market Place also retains its traditional market function, with sufficient space maintained for this use. There are further opportunities to provide seating, landscaping and trees.

George Yard Shopping Centre has a variety of shops but has a higher vacancy rate than other areas of Braintree. With five vacancies at the time of writing, this equates to a vacancy rate of 14.7%, higher than Braintree's average 11%. The western end, where the centre connects to the car park, is less successful due to a cluster of vacancies and lower pedestrian flow.

There are other areas of the town centre that are less attractive. The Tesco at Market Place is a strong anchor store for the centre, but it has limited interaction with the streetscape due to its brick façade, for example along the east-west portion of Market Street, (Phoenix Shopping Centre) where only the northern frontage is active. This area is an underutilised with poorer condition paving, prominent security cameras and several vacancies. Similarly, the pedestrian link through to New Street and the Tesco car park is of poorer quality, with uneven paving, ad-hoc parking and visible refuse areas.

School Walk, connecting to Sainsbury's from Market Place is well-utilised due to its connection to the car park, but is in poorer condition and lacks surveillance due to the absence of shop frontages. Similarly, Drury Lane's function as primarily a service area which provides an unattractive environment, and the refuse area at the southern end of Sandpit Lane is an unattractive entry to the street.

Of the household survey respondents who had visited Braintree town centre in the past year, the range of shops was viewed more positively than the attractiveness of the environment. The cumulative score of 11.7% included positive comments about the pedestrianised area, general attractiveness of the environment, and quality of open spaces and parks. Comments about the atmosphere totalled 8.9%.

There were higher levels of satisfaction with the quality of the environment and atmosphere in Braintree. However, cleanliness and maintenance were viewed negatively. Around 7.6% of respondents commented negatively on this issue. This included comments on rubbish bins, lighting, cleaner streets and a need for general refurbishment.

Occurrence of crime

Braintree has a crime rate of 101 per 1,000 people, above the average for Essex at 84 per 1,000. (2023, Crimerate.co.uk) and the highest of all three centres.

In June 2024, 72 crimes were reported within Braintree's town centre (Police.uk). The main concentrations were located at the entrance to George Yard shopping centre on Bank Street (10 reported crimes); and at Market Place (9 reported). Shoplifting crimes were concentrated in the Tesco (4 crimes) and Sainsbury's (4 crimes). Data for May 2024 shows a similar level of crime (56 crimes reported) with similar patterns of shoplifting concentrated at supermarkets. A total of 58 crimes were reported in April 2024.

Braintree was the only centre for which security and safety was raised by survey respondents. Approximately 5.5% of respondents suggested improvements were necessary, whereas for Halstead positive comments equalled negative comments (0.2% each) and in Witham, only positive comments were made (1.5%). It was the ninth most significant negative comment made about Braintree town centre.

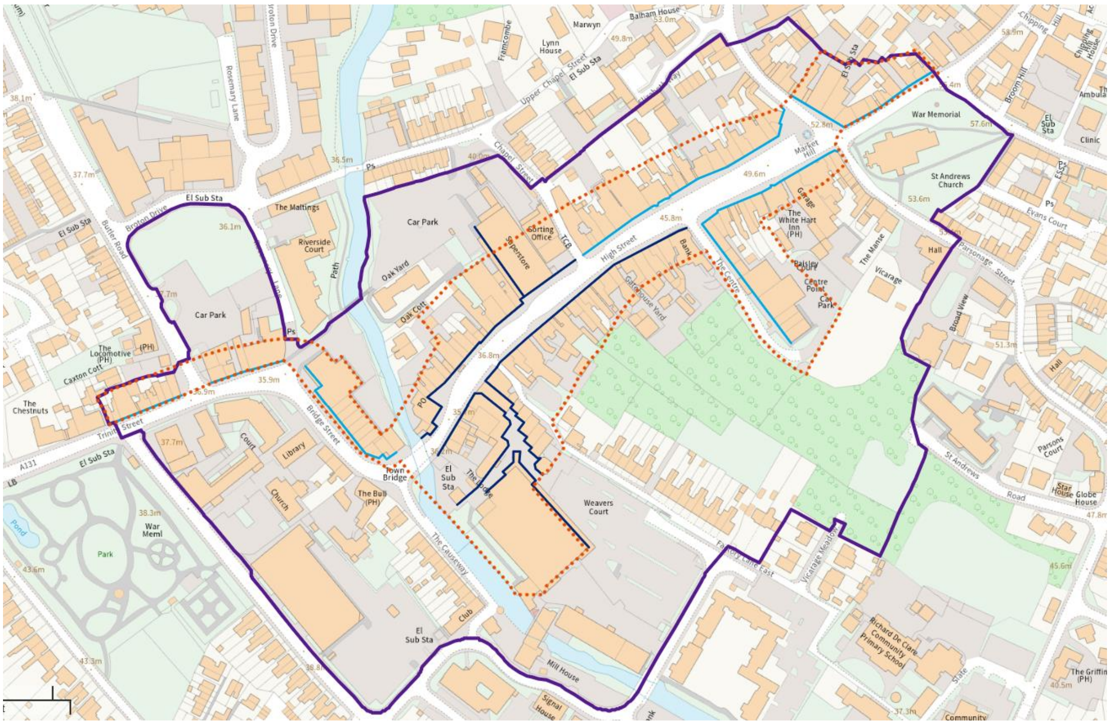
Summary

Braintree town centre is the largest centre in the District with a district-wide catchment. It has a reasonable range and choice of shops and services, although the importance of comparison goods retail has diminished in recent years. Overall, the centre appears vital and viable but the shop vacancy rate is relatively high. The main objective in the short to medium term should be to retain existing shops and services and reduce the number of vacant units.

HALSTEAD TOWN CENTRE

Halstead is a designated town centre centrally located in Braintree District, approximately 9km north of Braintree, 12km south of Sudbury and 19km west of Colchester. The centre serves Halstead urban area and the surrounding villages/settlements including Earls Colne and Sible Hedingham.

Figure H1 Extract of proposals map – Halstead town centre



Source: Braintree District Local Plan 2013-2033

The Braintree District Local Plan 2013-2033 defines a Primary Shopping Area (PSA) (dotted orange outline) within Halstead's Town Centre (purple outline), shown in Figure H1 above. The centre is linear in form with the shopping area stretching along the High Street and Bridge Street. Weavers Court shopping centre is located at the west end of the High Street and is anchored by a Co-op supermarket within its open arcade. The primary shopping frontage (marked dark blue) includes the central section of the High Street and Weaver Court. The secondary shopping frontage (marked light blue) includes part of Bridge Street and the east end of the High Street. River Colne bisects the town centre and provides a separation between the primary and secondary shopping frontages on the southern end of High Street.

Mix of uses and vacancies

Halstead town centre has 144 retail and service units, considerably less than Braintree town centre's 263 units. The mix of uses is set out in Table H1, which is compared with the District and UK averages. There were 16 vacant units within the centre at the time of the Lichfields' 2024 land use survey, equating to a shop vacancy rate of 11.1%, similar to the District average but below the UK average. The 2018 Retail Study Update indicated Halstead had a slightly higher number with 19 vacant units and a vacancy rate of 13.2%.

The composition mix of uses in Halstead broadly reflects the District and UK averages, but there is a slightly below average provision of convenience retail outlets. The provision of hot food takeaways and pubs/bars is marginally above the UK average and a much higher provision of other non-retail services. A more detailed breakdown of the comparison goods retail outlets and non-retail services available is shown in Tables H2 and H3.

Table H1 Mix of retail and service uses – Halstead town centre

Type	Number of units	% units	District average (% units)	UK average (% units)
Convenience retail	10	6.9	8.3	9.8
Comparison retail	39	27.1	23.6	28.4
Financial/Professional	11	7.6	11.7	8.5
Restaurants/Cafés	14	9.7	10.3	10.7
Pubs/Bars	9	6.3	4.9	5.1
Hot food takeaways	12	8.3	8.4	6.4
Other non-retail services	33	22.9	22.2	16.3
Vacant	16	11.1	10.6	14.8
Total	**144**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey (July 2024) and Goad Plan UK averages (July 2024)

Table H2 Mix of comparison goods retail uses – Halstead town centre

Type	Number of units	% units	District average (% units)	UK average (% units)
Clothing and footwear	6	15.4	13.2	20.8
Furniture, carpets and textiles	1	2.6	5.9	7.4
Books, arts, cards and stationers	3	7.7	9.9	6.2
Electrical, music and photography	2	5.1	6.6	9.4
DIY, hardware and homeware	3	7.7	5.9	7.1
China, glass and gifts	1	2.6	1.3	5.8
Cars, motorcycles and accessories	0	0.0	0.7	1.3
Chemists, drugstores and opticians	3	7.7	17.8	12.1
Variety, department and catalogue	1	2.6	3.3	1.4
Florists, nurserymen and seedsmen	1	2.6	2.6	2.1
Toys, hobby, cycle and sports	4	10.3	5.9	5.5
Jewellers	1	2.6	3.9	5.1
Charity and second-hand shops	8	20.5	18.4	10.0
Other comparison goods retailers	5	12.8	4.6	5.7
Total	**39**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey (July 2024) and Goad Plan UK averages (July 2024).

Halstead has 39 comparison goods retail shops, similar to Witham (40 outlets) but significantly lower than Braintree town centre (61 outlets) and Braintree Village (63 units). Halstead still has a reasonable range of comparison goods shops, with 13 of the 14 Goad Plan shop categories represented, as shown in Table H2. However, there is a limited choice in most categories with only one to three shops. Consistent with national trends, Halstead has also seen a small decline in the number of comparison units, down from 42 in 2015. Halstead has eight charity/second-hand shops, which equates to a 20.5% proportion, double the national average. There is a reasonable provision of toys/hobby/cycle/sports outlets, but Halstead has a lower representation of clothing/footwear; furniture/carpets/textiles; electrical/music/photography; china/glass/gifts; chemists/drugstores/opticians and jewellers.

Halstead has a good range and choice of non-retail services (79 units), as shown in Table H3. In terms of food offer, its restaurants/cafés provision is below the District and UK averages, but the provision of pubs/bars and hot food takeaways is slightly higher than the UK averages, which suggests a reasonable evening economy. There are only three financial services, including a building society, which is substantially lower than the District and UK averages. Halstead has a higher provision of hairdressers/beauty parlours and launderettes/dry cleaners, when compared with the District and UK averages. Other non-retail service uses include a post office, a pet grooming facility and funeral directors.

Table H3 Mix of non-retail service uses – Halstead town centre

Type	Number of units	% units	District average (% units)	UK average (% units)
Restaurant / café	14	19.4	20.8	25.1
Hot food takeaway	12	16.7	16.9	15.1
Public house / bar	9	12.5	9.8	11.9
Bank / other financial service	3	4.2	5.9	7.1
Betting shop / casino / amusement	2	2.8	2.7	3.6
Estate agent / valuer	6	8.3	11.3	7.3
Travel agent	1	1.4	2.1	1.4
Hairdresser / beauty parlour	23	31.9	28.5	27.1
Launderette / dry cleaner	2	2.8	2.1	1.5
Sub-total	**72**	**100.0**	**100.0**	**100.0**
Other non-retail services	7			
Total	**79**			

Source: Lichfields' land use survey (July 2024) and Goad Plan UK averages (July 2024)

Halstead has a limited number of national multiple outlets, as set out in Table H4. The comparison goods retail sector is primarily charity shops. Halstead's retail and food/beverage offer is mainly small independent businesses.

Table H4 Multiple retailers – Halstead town centre

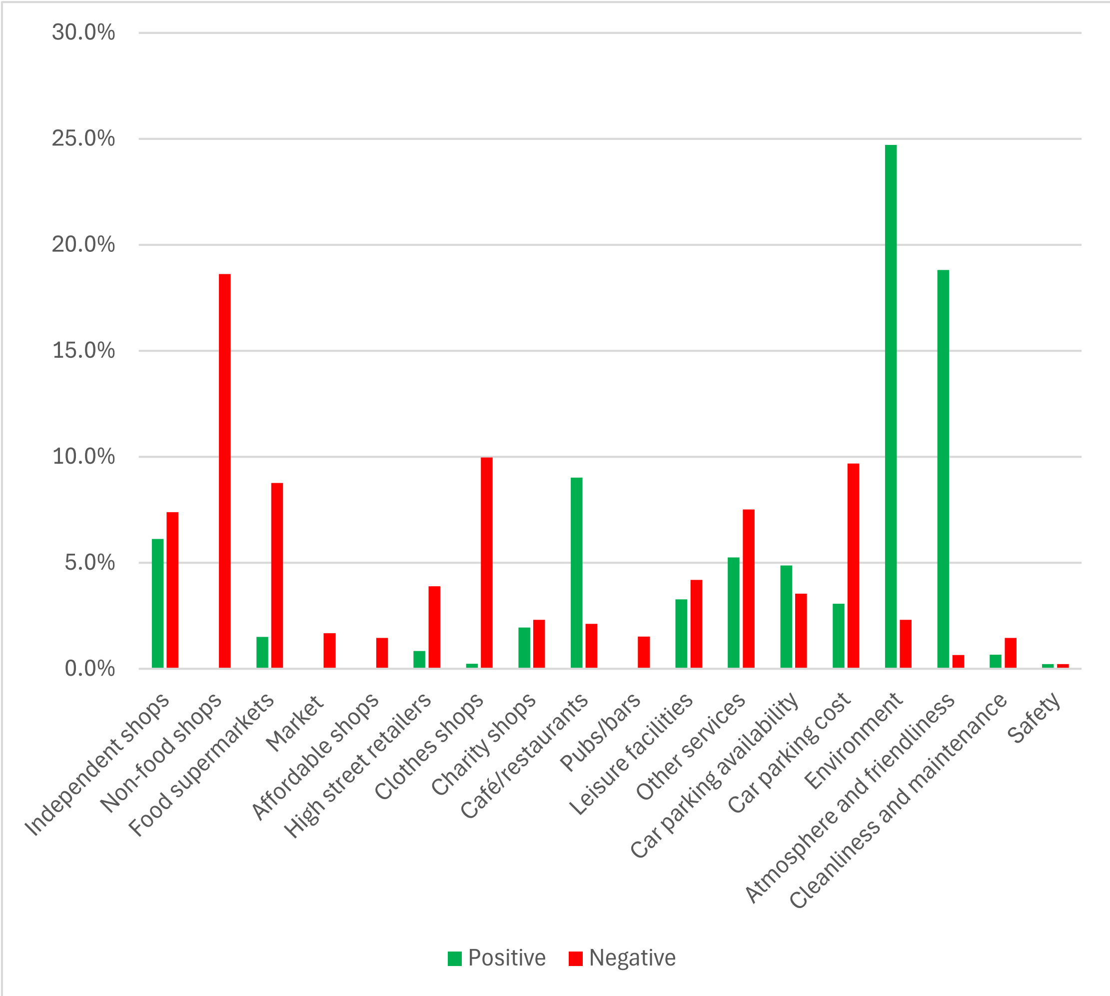
Comparison		Convenience	Food and Beverage
Age UK Boots British Red Cross Scope	WH Smith	Co-op Greggs Premier Sainsbury's	Costa Domino's Greene King

Source: Lichfields' land use survey (July 2024)

Customer views

Around 25% of respondents in the study area had visited Halstead town centre in the past 12 months. Of those who had used shops/services in Halstead, respondents were asked what they liked about the town centre and what improvements would make them visit more often. These factors are compared in Figure H2 below.

Figure H2 - Positive and negative factors visitors mentioned about Halstead town centre (% of all Halstead visitors)



Source: NEMS household survey June 2024

The survey results are mixed. The environment, atmosphere and cafés/restaurants are viewed the most positively, but the availability of non-food shops, clothes shops, food supermarkets and cost of car parking are negative factors. Other aspects had mixed opinions or were mentioned by a low number of respondents.

Customer activities and catchment area

Of the 25% of study area respondents who had visited shops, services or leisure facilities in Halstead town centre during the last year, the majority of visitors came from the local Halstead area - Zone 4. Halstead attracts a marginally higher proportion of visitors than Witham (24%), but much lower than Braintree town centre (54%). The next most visited centre was Great Notley (16%).

The average length of stay for household visiting Halstead was 91 minutes, below the average for Braintree town centre (99 minutes) but above Witham (84 minutes). Only 1.9% of households in the study area do most of their non-food shopping in Halstead, much lower than Braintree town centre (8.2%) and Witham (4%). These results suggest Halstead town centre is not a particularly significant destination for non-food shopping.

The breakdown of activities undertaken by visitors to Halstead town centre is shown and compared with the average for the other centres in Table H5. The centre has a low proportion of visitors utilising banks and financial services, reflecting its limit offer in this sector. Shopping activities are fairly consistent with the District averages. Halstead has higher proportion of visitors going for a walk, undertaking leisure activities, visiting health facilities, post office and other service uses, suggesting a diverse mix of activities in the town centre in addition to shopping.

Table H5 - Activities carried out by visitors to Halstead town centre (% of all visitors to each centre)

Activity	Halstead	Average for all centres
Shopping		
Non-food shopping	53.5	**53.1**
Food shopping	45.1	**46.4**
Window shop/browse	14.4	**13.8**
Visting the market	4.6	**3.2**
Leisure		
Go for a walk	7.2	**2.9**
Café/pub/restaurant	29.5	**29.3**
Leisure activity	10.6	**7.7**
Other services		
Banks/other financial institutions	1.3	**6.7**
Health facilities	16.3	**11.2**
Library	2.2	**1.2**
Getting petrol	1.6	**0.7**
Post office	13.5	**6.4**
Other service uses	13.7	**10.4**
Other activities		
Travelling to/from work	2.2	**2.2**
Education/school run	4.4	**2.7**
Visting family/friends	11.6	**6.8**

Source: NEMS household survey (June 2024) * percentages add to more than 100% dues to multiple activities.

The retail capacity analysis suggests Halstead town centre has a comparison goods turnover of over £23 million in 2024, significantly lower than Braintree town centre (£86 million) but only marginally lower than Witham town centre (£25 million). Halstead attracts most (about 85%) of its trade from its local area (Zone 4 – Halstead), indicating it has a localised, rather than a District-wide, shopping catchment area.

Rental levels

Data from the Valuation Office Agency (VOA) shows that Halstead has peak shop rental values of £293 per sq.m., with the highest values on the High Street (with the lowest at £175 per sq. m) followed by Weavers Court (£190-255 per sq.m). These are the lowest rental values of the three town centres in the district.

Rental values are lowest at the Centre (£110 per sq.m) followed by Parsonage Street (£130 per sq.m). Bridge Street, Trinity Street, and Hedingham Road have consistent values between £175 and £185 per sq.m. This increases at Market Hill (£200 per sq.m) and Head Street (£200-£235 per sq.m).

The highest values at the High Street are found along its southeastern frontage, at areas adjacent to Weaver's Court. On this side of the High Street, the highest values of £255 and £293 per sq.m can be found (numbers 29, 25-23; 41; 51; 55; 69; 75). At the same point on the opposite side of the street, values drop to £245 (numbers 52; 60; 64; 72; 78) and £210 (14a; 18; 28; 30; 40). As will be discussed, the accessibility and layout of the town centre may contribute to this difference.

Accessibility

Halstead has no nearby railway station but it has centrally located bus stops on the High Street. Outside of the town centre boundary, Butler Road has a bus and coach station, and there are additional stops just west of the centre at Halstead Park and on Pretoria Road, northeast of the town centre. Services link the centre to Halstead (38, 38A), Braintree (38, 38A, 89), Colchester (88, 88A, 88B, 716), and Chelmsford (370). Routes also connect to the smaller towns and villages of Earls Colne (88, HALCON2), Great Yeldham (89), Sible Hedingham (223, 716), and Coggeshall (HALCON2).

Halstead's town centre is served by four main car parks, with on-street parking also available, and customer parking at Lidl and the Co-op. The number of spaces and charging regime is set out below. Chapel Street and Butler Road are Council-run car parks, with free parking after 3pm and on Sundays.

Table H6 Halstead Car Parks

Car park	Spaces	Charges
Butler Road	42 spaces	0-90 minutes - £1; 90 minutes-3 hours – £2; 3-6 hours - £3; 6 hours+ - £5 (Monday-Saturday 8am-6pm)
Chapel Street	110 spaces, including four charging stations.	As above, with a one-hour refund when spending £15+ in Sainsbury's
Solar Car Park (for Weaver's Court)	173 spaces	2 hours free parking, no return within 4 hours.
High Street	58 spaces	1 hour free, no return within 4 hours.

Source: Halstead Town Council

Bridge Street has a high volume of traffic, which continues along the High Street. As an A-road, pedestrian crossings are limited, which is a barrier to pedestrians, and the speed of traffic accompanied by narrow pavements creates an unpleasant pedestrian environment in places, which may affect footfall. At time of Lichfields' site visit, it was observed that there was higher footfall on the southern side of the High Street, which is consistent with higher rental values in this area.

Pedestrian flows were significantly lower on the side streets of The Centre and Hedingham Road. Weavers Court shopping centre was well utilised, benefiting from the well-connected Co-op car park.

Of the household survey respondents who had visited Halstead town centre in the past year, the attractiveness of the environment was the most liked attribute (24.7%). In relation to accessibility, respondents mentioned factors liked as follows: easy to get there on foot (7.5%); good layout/shops close together (6.4%); easy to find a parking space (4.9%), free parking (3.1%) and easy to get there by car (2.6%); and a good bus service (1.1%).

Car parking cost the most significant negative issue identified by respondents, with 9.0% suggesting making it free, and 0.7% making it cheaper. Although a total of 3.6% commented negatively on parking availability, 4.9% commented positively on this issue. Other improvements to accessibility suggested were as follows: less traffic congestion/improved access (2.7%); flatter (1.9%); easier to get there by car (2.6%); easier to get there by bus (1.5%); and easier to get there by train (1.4%).

Car parking cost was the most significant negative accessibility issue mentioned by respondents, but this was viewed more negatively in Braintree town centre. Other accessibility factors were viewed more positively than negatively overall.

Environment and ambience

Halstead has a quaint and welcoming atmosphere. Most parts of the town centre are within a Conservation Area. High Street is populated with Listed heritage buildings. The Parish Church of St Andrew's and the former drinking fountain at the Market Hill roundabout provides a focal point at the northern end of High Street and the PSA. The centre has attractive open spaces including the church and area around the Halstead Library on Bridge Street.

The River Colne provides an attractive setting including the southern section of High Street and The Causeway which runs parallel to the river. Planters with flowers line the riverside. Numerous flowerpots and planters are found across the town centre.

Halstead Park and Public Gardens is located just south-west of the town centre, including a children's playground, pond, bandstand and war memorial. This area is well-utilised with several events. There is a large wooded area within the town centre, situated south of the High Street between Weavers Court shopping centre and The Centre shopping street. This space has been allocated a Comprehensive Development Area in the Local Plan policies map.

There are several shop vacancies along the main High Street, but these do not form noticeable clusters. Pavements are generally wide and in good condition. Street furniture is well provided with an adequate provision of seating, bins and street lighting throughout.

The customer survey results show high levels of satisfaction compared to dissatisfaction with the quality of the environment and atmosphere in Halstead. Layout is also viewed positively but attracted fewer comments. Cleanliness and maintenance were however viewed negatively, with 3.8% suggesting a need for improvements.

Occurrence of crime

Halstead has a crime rate of 92 per 1,000 people, higher than Witham (89 per 1,000) but lower than Braintree (101 per 1,000) (Crimerate.co.uk, 2023). It is just above the average for Essex of 84 per 1,000 people.

Data from Police.uk shows that 10 crimes were reported in Halstead's town centre in June 2024. Crimes were reported evenly spread throughout the centre. The majority of crimes were theft-related (four counts). Seven crimes were reported in May 2024. In April 2024, only six crimes were reported.

Perceived safety and security did not attract many comments in the household survey, but was equally split, with less than one percent of respondents commenting positively and negatively on the issue. The crime rate does not appear to be a significant issue in Halstead town centre.

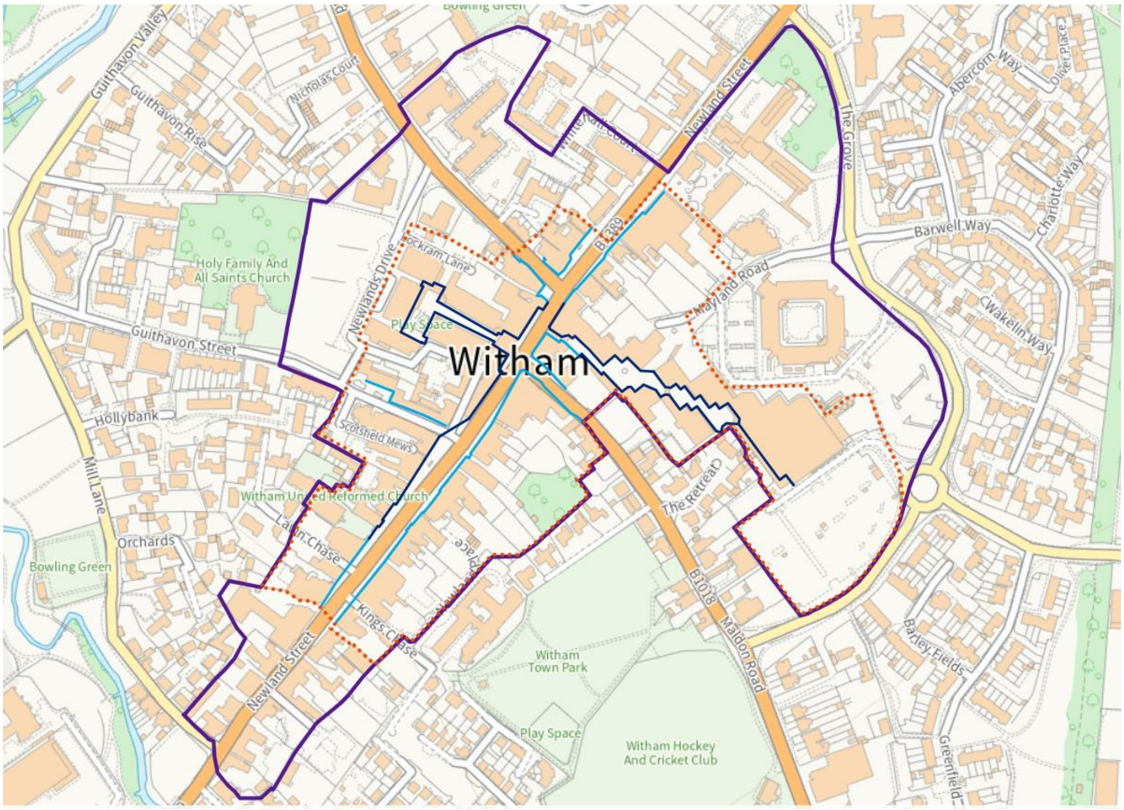
Summary

Halstead is the smallest largest of the three town centres in the District and has a relatively localised catchment area. It has a limited choice of comparison goods shops that are primarily small independent traders or charity shops. The centre has a stronger provision of non-retail services. Overall, the centre appears vital and viable but the shop vacancy rate is relatively high. The main objective in the short to medium term should be to retain existing shops and services and reduce the number of vacant units.

WITHAM TOWN CENTRE

Witham is a designated town centre to the south of Braintree District, approximately 10km south of Braintree, 13km north-east of Chelmsford and 20km south-west of Colchester. The centre serves Witham urban area and the surrounding villages/settlements including Hatfield Peverel and Kelvedon.

Figure W1 Extract of proposals map - Witham town centre



Source: Braintree District Local Plan 2013-2033

The Braintree District Local Plan 2013-2033 defines a Primary Shopping Area (PSA) (dotted orange outline) within Witham's Town Centre (purple outline), shown in Figure W1 above. The centre is mainly linear in form and the shopping area stretches along Newland Street – it forms an intersection of sorts with The Grove Shopping Centre and Newlands Shopping Centre which branch out from the main shopping spine. These shopping centres are anchored by a Tesco superstore and a Peacocks store. The primary shopping frontages (marked dark blue) include the northern side of Newland Street and the two shopping centres. The secondary shopping frontage (marked light blue) include the south side and peripheral parts of the north side of Newland Street.

Mix of uses and vacancies

Witham town centre has 153 retail and service units, slightly more than Halstead but considerably less than Braintree town centre (263 units). The mix of uses is set out in Table W1 and compared with the District and UK averages. There were 13 vacant units in the centre at the time of the Lichfields' 2024 land use survey, equating to a shop vacancy rate of 8.5%, which is lower than the District average and substantially below the UK average. Witham had slightly more vacant units (17) in 2015.

The mix of uses in Witham broadly reflects the District and UK averages, with some variations. It has a lower provision of convenience retail outlets, but this includes a large Tesco superstore.

There is an above average provision of financial/professional services, restaurants/cafés, pubs/bars and hot food takeaways, although the latter is in line with the District average. A more detailed breakdown of comparison goods retail outlets and non-retail services is shown in Tables W2 and W3.

Table W1 Mix of retail and service uses – Witham town centre

Type	Number of units	% units	District average (% units)	UK average (% units)
Convenience retail	8	5.2	8.3	9.8
Comparison retail	40	26.1	23.6	28.4
Financial/Professional	20	13.1	11.7	8.5
Restaurants/Cafés	23	15.0	10.3	10.7
Pubs/Bars	9	5.9	4.9	5.1
Hot food takeaways	13	8.5	8.4	6.4
Other non-retail services	27	17.6	22.2	16.3
Vacant	13	8.5	10.6	14.8
Total	**153**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey (July 2024) and Goad Plan UK averages (July 2024)

Table W2 Mix of comparison goods retail uses – Witham town centre

Type	Number of units	% units	District average (% units)	UK average (% units)
Clothing and footwear	5	12.5	13.2	20.8
Furniture, carpets and textiles	0	0.0	5.9	7.4
Books, arts, cards and stationers	7	17.5	9.9	6.2
Electrical, music and photography	1	2.5	6.6	9.4
DIY, hardware and homeware	4	10.0	5.9	7.1
China, glass and gifts	0	0.0	1.3	5.8
Cars, motorcycles and accessories	1	2.5	0.7	1.3
Chemists, drugstores and opticians	9	22.5	17.8	12.1
Variety, department and catalogue	1	2.5	3.3	1.4
Florists, nurserymen and seedsmen	1	2.5	2.6	2.1
Toys, hobby, cycle and sports	0	0.0	5.9	5.5
Jewellers	3	7.5	3.9	5.1
Charity and second-hand shops	7	17.5	18.4	10.0
Other comparison goods retailers	1	2.5	4.6	5.7
Total	**40**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey (July 2024) and Goad Plan UK averages (July 2024)

Witham town centre has 40 comparison goods retail shops, one more than Halstead town centre but significantly less than Braintree town centre (61 units). Consistent with national trends, Witham has also seen a decline in the number of comparison units, from 54 outlets in 2015. Witham still has a reasonable range of comparison goods shops, with 11 of 14 Goad Plan shop categories represented, as shown in Table W2. However, there is a limited choice in most categories. Witham has seven charity/second-hand shops, above the UK average. There are few national multiple retailers, as set out in Table W4. Witham's comparison retail offer is mainly small independent outlets.

Witham has a larger range and choice of non-retail services (92 outlets), as shown in Table W3. Its food and beverage offer is particularly strong, above the UK average. The centre has a good evening economy. The provision of estate agents is higher than the UK average, but comparable with the District average. There are only four financial services, but this includes three banks/building societies.

Table W3 Mix of non-retail service uses – Witham town centre

Type	Number of units	% units	District average (% units)	UK average (% units)
Restaurant / café	23	28.8	20.8	25.1
Hot food takeaway	13	16.3	16.9	15.1
Public house / bar	9	11.3	9.8	11.9
Bank / other financial service	4	5.0	5.9	7.1
Betting shop / casino / amusement	3	3.8	2.7	3.6
Estate agent / valuer	9	11.3	11.3	7.3
Travel agent	2	2.5	2.1	1.4
Hairdresser / beauty parlour	16	20.0	28.5	27.1
Launderette / dry cleaner	1	1.3	2.1	1.5
Sub-total	**80**	**100.0**	**100.0**	**100.0**
Other non-retail services	12			
Total	**92**			

Source: Lichfields' land use survey (July 2024) and Goad Plan UK averages (July 2024)

Witham has a lower number of national multiple outlets than Braintree town centre but a higher number than Halstead, as set out in Table W4. The comparison goods retail sector includes several charity shops. Witham's retail offer is a mix of multiples and small independent businesses. The food/beverage offer is primarily small independent businesses.

Table W4 Multiple retailers – Witham town centre

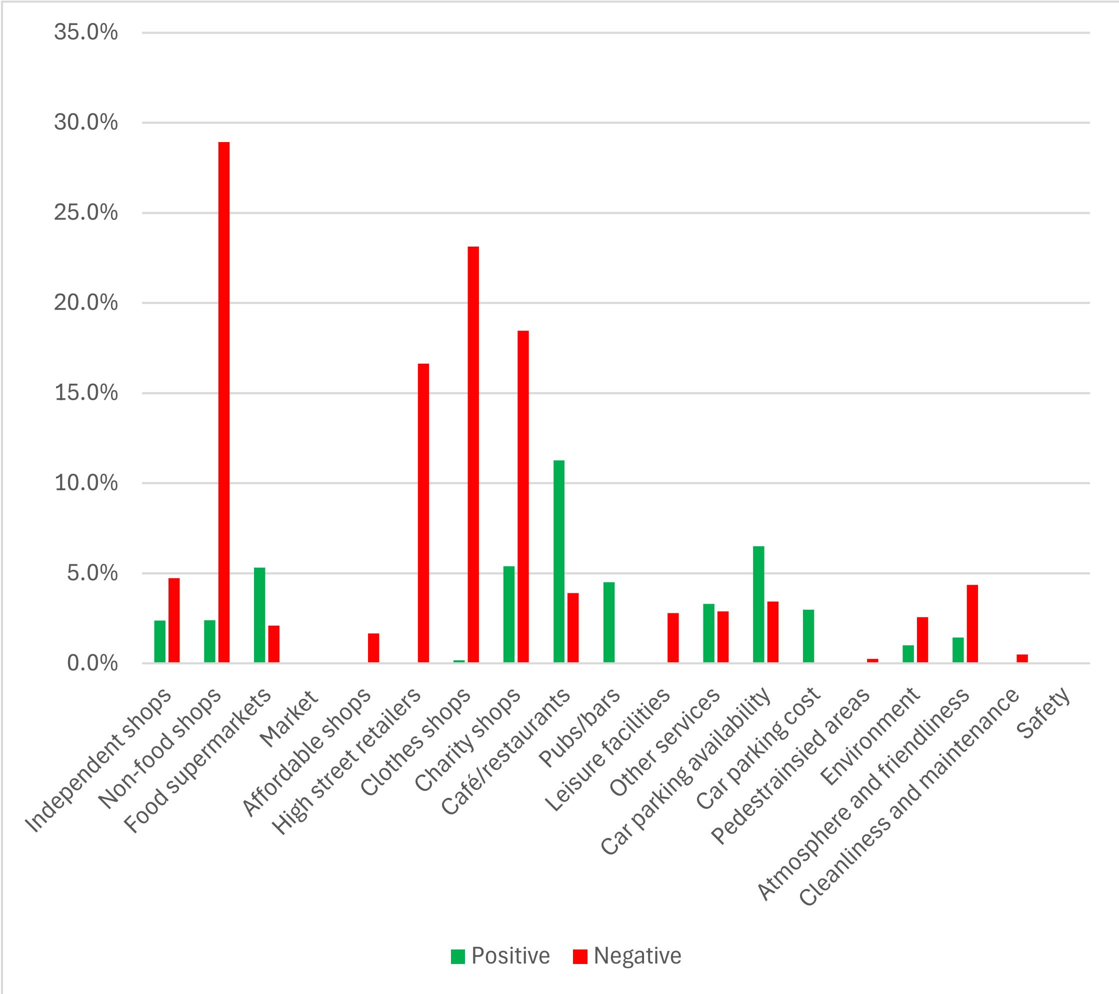
Comparison		Convenience	Food and Beverage
Age UK	Poundland	Greggs	Admiral Inns
Barnardo's	RSPCA	Holland & Barrett	Costa
Boots Chemist	Savers	Iceland	J D Wetherspoon's
Boots Opticians	Select	Morrison's Daily	Prezzo
Card Factory	Specsavers	Tesco	Subway
Lloyds Pharmacy	Superdrug		
Peacocks	The Works		
PDSA	YMCA		

Source: Lichfields' land use survey (July 2024)

Customer views

Around 24% of respondents in the study area had visited Witham town centre in the last 12 months. Of those who had used shops/services in Witham, respondents were asked what they liked about the town centre and what improvements would make them visit more often. These factors are compared in Figure W2 below.

Figure W2 - Positive and negative factors visitors mentioned about Witham town centre (% of all visitors)



Source: NEMS household survey (June 2024)

The survey results show higher levels of dissatisfaction than satisfaction with the town centre in relation to the range of non-food shops, clothes shops and high street retailers. Cafés/restaurants and pubs/bars were viewed more positively than negatively. Parking availability and cost were also viewed more positively. Low numbers of respondents suggested other factors. The most liked attribute was its proximity to home (27.7%), significantly ahead of the second most liked attribute, cafés and restaurants (11.3%).

There were mixed views with regard to charity shops with 5.4% likely the provision but more (18.5%) would like less charity shops. Non-food shops was the most significant negative factor raised (29%) followed by 23.1% requesting ‘more/better’ clothes shops. Overall, the provision of shops were the top six most negative views, including negative views on shop vacancies (5.4%), consistent with other centres, and independent shops (4.7%). This suggests that visitors to Witham are more likely to be dissatisfied with the retail offer, with only supermarkets attracting higher levels of satisfaction than dissatisfaction. Views on its environment and atmosphere did not attract significant levels of comment, compared with Braintree and Halstead town centre.

Customer activities and catchment area

Of the 24% of study area respondents who had visited shops, services or leisure facilities in Witham town centre during the last year, the majority of these visitors live in the local Witham area – Zone 3.

The average length of stay for household visiting Witham was 84 minutes, the lowest of the three town centres in the District. About 4% of households in the study area do most of their non-food shopping in Witham, much lower than Braintree town centre (8.2%) but higher than Halstead (1.9%). These results suggest Witham town centre is not a particularly significant destination for non-food shopping.

The breakdown of activities undertaken by visitors to Witham town centre is shown and compared with the average for the other centres in Table W5. Witham has lower than average levels of non-food shopping in the centre, but higher levels of food shopping.

All non-retail service uses are below the District average, except for visiting cafés/pubs/restaurants and leisure activities.

Table W5 - Actvities carried out by visitors to Witham town centre (% of all visitors to each centre)

Activity	Witham	Average for all centres
Shopping		
Non-food shopping	47.0	**53.1**
Food shopping	51.9	**46.4**
Window shop/browse	14.0	**13.8**
Visting the market	0.2	**3.2**
Leisure		
Go for a walk	1.3	**2.9**
Café/pub/restaurant	30.6	**29.3**
Leisure activity	8.1	**7.7**
Other services		
Banks/other financial institutions	1.8	**6.7**
Health facilities	7.3	**11.2**
Library	0.8	**1.2**
Getting petrol	0.3	**0.7**
Post office	2.2	**6.4**
Other service uses	6.8	**10.4**
Other activities		
Travelling to/from work	1.7	**2.2**
Education/school run	1.6	**2.7**
Visting family/friends	3.8	**6.8**

Source: NEMS household survey (June 2024) * percentages add to more than 100% dues to multiple activities.

The retail capacity analysis suggests Witham town centre has a comparison goods turnover of £25 million in 2024, significantly lower than Braintree town centre (£86 million) but marginally higher than Halstead town centre (£23 million). Witham attracts most (about 90%) of its trade from its local area (Zone 3 – Witham), indicating it has a localised, rather than a District-wide, shopping catchment area.

Rental levels

Data from the Valuation Office Agency (VOA) shows that Witham has peak shop rental values of £330 per sq.m., higher than Halstead (£293 per sq.m) but lower than Braintree (£450 per sq.m). The highest values are within the Grove Shopping Centre, at £330 per sq.m. The majority of units at Newlands Shopping Centre also achieve this value, with a handful between £125-313 per sq.m. On Guithavon Road values range between £180-300 per sq.m. On Maldon Road values are consistently £210 per sq.m.

Along Newland Street, peak values of £330 are at the northwestern frontage of Newland Street, between Lawn Chase and Maldon Road. Other high-value hotspots are generally associated with proximity to the two shopping centres.

Accessibility

Witham is on the London to Braintree rail line, with trains running every hour. There are also routes to Colchester, Ipswich and Clacton-on-Sea. The station within walking distance, located approximately half a mile to the northwest of the town centre. This pedestrian route is direct but the station could benefit from additional signage to the town centre. There are bus stops adjacent to the station.

There are several centrally located bus stops, at the northeastern and southwestern ends of Newland Street, and on Collingwood Road, at the northwest of the centre. Bus stops are prominent and well-maintained. Services link the centre to Halstead (38, 38A), Braintree (38, 38A), Chelmsford (71, X71, 371, 372), Colchester (71, X71, 271, 372), and Tiptree (91). There are also connections to the town's suburbs (39, 40) and the smaller towns and villages of Bocking (38, 38A), Maldon (90), Kelvedon (91), Danbury (505), and Chelmer (513).

Witham's town centre is served by three main central public car parks. The number of spaces and charge regime is set out in the table below. Three hours free parking is also available at the Tesco adjacent to the Grove Centre. Southeast of the centre parking is also available at Lidl and Witham Leisure centre.

Table W6 Witham town centre car parks

Car park	Spaces	Charges
Mayland Road	329 spaces – permit holders only Mon-Fri.	Sunday £1.50 all day. Saturday: up to 1 hour - £1.50; 1-3 hours - £2.80; 3-6 hours - £4.50; over 6 hours - £7.00; overnight (after 7pm-7am) - £1.00.
Mill Lane	43 spaces	Sunday £1.50 all day. Monday-Saturday: up to 1 hour - £1.50; 1-3 hours - £2.80; 3-6 hours - £4.50; over 6 hours - £7.00; overnight (after 7pm-7am) - £1.00.
Newlands Drive	197 spaces	As above – same as Mill Lane.

Source: Braintree District Council

Witham town centre's layout forms an 'X' with two shopping centres, Newlands and The Grove, connecting to Newland Street. The centre primarily linear in form running approximately 0.5 kilometres along Newland Street, with no other significant secondary shopping streets or pedestrian circuits. Accessibility benefits from the connections between the two shopping centres and their respective car parks, with Newland Street, which encourages through-flows. Pedestrian flows are lower at the peripheral sections of Newland Street, although the Leisure Centre and Lidl store at the southwestern end provides an important anchor.

Newland Street has reasonably high levels of traffic which conflicts with its function as the main shopping street. The gaps between pedestrian crossings, and the occasionally narrow pavements restrict pedestrian movement. There are some signs of wear to the paving throughout the centre. Nevertheless, there are fairly consistent pedestrian flows along Newland Street and throughout the two shopping centres. Pedestrian flows are lower at the northeastern section of Newland Street, where retail uses become more dispersed.

Witham lacks a clear focal point with no traditional square. The Newlands and The Grove shopping centres, partially fulfil this function. There may be an opportunity to improve the environment where the two centres intersect with Newland Street.

Of the household survey respondents who had visited Witham town centre in the past year, the proximity of the centre to home was the most liked attribute (27.7%). In relation to accessibility, respondents mentioned factors liked as follows: easy to find a parking space (6.5%); good layout/shops close together (5.9%); easy to get there by car (3.1%); free parking (2.7%); good train service (1.6%); and easy to get there on foot (1.5%).

Parking was generally viewed more positively than negatively in Witham. This also applies to accessibility more generally, with no significant issues identified. Suggested improvements were as follows: more parking available (3.2%); more cycle lanes (1.5%); less traffic congestion / improved access (1.2%), and free parking (1.0%). Accessibility issues attracted significantly fewer comments than the range of shops and compared to the other centres suggests it is not a major issue.

Environment and ambience

Witham's structure is generally linear with no central focal point for people to meet and gather. The two shopping centres provide benches and litter bins along the open arcades. There are a group of shop vacancies near the Tesco store at The Grove and some scattered vacant units at Newlands.

Witham town centre is reasonably well maintained. Most of the town centre lies within a Conservation Area and there are several Listed heritage buildings, particularly along Newland Street. There is no open green space or parks/gardens within the town centre. However, Witham Town Park is located just outside the southern town centre boundary and includes a recreation area with playground as well as sports playing fields. Also outside the town centre, River Brain cuts across the southern section of Newland Street outside and is surrounded by green spaces along its riverside.

During the time of Lichfields' site visit, Witham was reasonably busy for a centre of its size, with consistent pedestrian footfall. The quality of paving throughout the centre is mixed, but in the most part pavements are reasonably well-maintained, clean and wide. There is a good provision of seating and bins throughout the centre and particularly in the shopping centres. There are flowerpots/planters on Newland Street. Overall, the centre feels safe and friendly.

Witham's town centre attracted few comments in the customer survey, positive or negative. Layout and atmosphere were viewed positively, but the environment in general, and cleanliness had higher levels of dissatisfaction. Positive factors mentioned included that it was quiet/not too busy (6.3%); good layout/shops close together (5.9%); nice atmosphere/friendly people (1.4%) and attractive environment (1.0%). 'Good for a day out' also attracted 2.6% of positive comments. Suggested improvements to the environment included reducing vacancies (5.2%), improving the atmosphere (4.4%); updating/refurbishing the shopping area (2.6%); and making the environment more attractive (2.4%). Overall, Witham has very similar levels of satisfaction compared to dissatisfaction with its environment.

Occurrence of crime

Witham has a crime rate of 89 per 1,000 people, the lowest of the district's town centres, and only slightly above the average for Essex of 84 per 1,000 people (crimerate.co.uk, 2023).

According to data from Police.uk, in June 2024 a total of 18 crimes were reported in the town centre. These were mainly categorised as theft, shoplifting, and anti-social behaviour. The highest levels of crime were recorded at the Tesco store (4 crimes) and the Grove Centre (3 counts of shoplifting). In May 2024 15 crimes were reported, with fewer counts of shoplifting recorded, but with anti-social behaviour reported at Guithavon Street/Coach Horse Way (4 counts). In April 2024, 28 crimes were reported, broadly following the same pattern as May and June.

Consistent with the lower average crime rate, safety and security were not raised as issues by survey respondents. No respondents suggested improvements needed to be made, reflecting the above statistics.

Summary

Witham is much smaller than Braintree town centre, but slightly larger than Halstead. It has a relatively localised catchment area. It has a mix of national multiple and small independent traders but the choice of comparison goods shops is relatively limited. The centre has a stronger provision of non-retail services, particularly restaurants/cafés. Overall, the centre appears vital and viable, with a relatively low vacancy rate. The main objective in the short to medium term should be to retain existing shops and services.

OTHER CENTRES / DESTINATIONS

Great Notley is designated in the retail hierarchy as a District Centre. There are five other designated Local Centres: Coggeshall; Earls Colne; Hatfield Peverel; Kelvedon and Sible Hedingham. An audit of facilities is set out below, along with Braintree Village shopping centre.

Braintree Village

The Braintree Village is located in the southeast of Braintree urban area and attracts customers from across the District and beyond. The centre has over 80 units primarily focused on comparison goods shopping, with supporting restaurants/cafés. Convenience goods provision includes three chocolate/confectionery shops and a bakery. The 63 comparison goods outlets are as follows:

- fashion/footwear 30 outlets
- homeware 9 outlets
- sports/outdoor 7 outlets
- gifts/accessories 7 outlets
- health/beauty 6 outlets
- handbags/luggage 4 outlets

Table OC1 - Mix of retail and service uses in Braintree Village

Type	Number of units	% units	District average (% units)	UK average (% units)
Convenience retail	4	4.9	8.3	9.8
Comparison retail	63	77.8	23.6	28.4
Financial/Professional	0	0	11.7	8.5
Restaurants/Cafés	6	7.4	10.3	10.7
Pubs/Bars	0	0	4.9	5.1
Hot food takeaways	0	0	8.4	6.4
Other non-retail services	0	0	22.2	16.3
Vacant	8	9.9	10.6	14.8
Total	**81**	**100.0**	**100.0**	**100.0**

Source: Braintree Village website and Goad Plan UK average.

Great Notley District Centre

The District Centre primarily serves Great Notley and Braintree urban area. The centre is anchored by a large Tesco superstore that caters for main food and grocery shopping trips and also provides a good selection of comparison goods. This superstore is supported by four other outlets including a public house, takeaway, hairdressers and an employment agency. In addition to these retail/service outlets there is a medical centre, vet practice and community association.

Table OC2 - Mix of retail and service uses in Great Notley District Centre

Type	Number of units	% units	District average (% units)	UK average (% units)
Convenience retail	1	20.0	8.3	9.8
Comparison retail	0	0	23.6	28.4
Financial/Professional	1	20.0	11.7	8.5
Restaurants/Cafés	0	0	10.3	10.7
Pubs/Bars	1	20.0	4.9	5.1
Hot food takeaways	1	20.0	8.4	6.4
Other non-retail services	1	20.0	22.2	16.3
Vacant	0	0.0	10.6	14.8
Total	5	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey July 2024 and Goad Plan UK average.

Coggeshall Local Centre

Coggeshall serves the area to the southeast of the District. It is the largest local centre in the District in terms of the number of units. However, the shop vacancy rate is relatively high (6 units) compared with the District and UK average. The centre has a Morrisons Daily convenience store and there is also an out of centre Co-op store (not included in the figures in the table below). The local centre has a reasonable selection of comparison goods outlets for a centre of its size including a chemist, optician and charity shop. The centre also has a reasonable selection of estate agents, hair/beauty salons, restaurant/cafés and pubs/bars.

Table OC3 - Mix of retail and service uses in Coggeshall Local Centre

Type	Number of units	% units	District average (% units)	UK average (% units)
Convenience retail	2	5.0	8.3	9.8
Comparison retail	9	22.5	23.6	28.4
Financial/Professional	4	10.0	11.7	8.5
Restaurants/Cafés	5	12.5	10.3	10.7
Pubs/Bars	2	5.0	4.9	5.1
Hot food takeaways	2	5.0	8.4	6.4
Other non-retail services	10	25.0	22.2	16.3
Vacant	6	15.0	10.6	14.8
Total	**40**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey July 2024 and Goad Plan UK average.

Earls Colne Local Centre

Earls Colne serves the area to the east of Halstead and is the second largest local centre in the District in terms of the number of units. The centre has a Co-op convenience store and small selection of specialist convenience goods shops. The local centre has a limited selection of comparison goods outlets including a chemist, optician and hardware shop. The centre also has a reasonable selection of non-retail services including pubs/bars, hair/beauty salons and takeaways.

Table OC4 - Mix of retail and service uses in Earls Colne Local Centre

Type	Number of units	% units	District average (% units)	UK average (% units)
Convenience retail	4	13.3	8.3	9.8
Comparison retail	5	16.7	23.6	28.4
Financial/Professional	4	13.3	11.7	8.5
Restaurants/Cafés	2	6.7	10.3	10.7
Pubs/Bars	2	6.7	4.9	5.1
Hot food takeaways	4	13.3	8.4	6.4
Other non-retail services	6	20.0	22.2	16.3
Vacant	3	10.0	10.6	14.8
Total	**30**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey July 2024 and Goad Plan UK average.

Hatfield Peverel Local Centre

Hatfield Peverel serves the area to the south of Witham and northeast of Chelmsford. It is the smallest local centre in the District in terms of the number of units. The centre has a small Co-op convenience store and a Boots pharmacy. The local centre has a limited selection of non-retail services including a public house, restaurant, estate agent, barber and hair/beauty salons.

Table OC5 - Mix of retail and service uses in Hatfield Peverel Local Centre

Type	Number of units	% units	District average (% units)	UK average (% units)
Convenience retail	2	18.2	8.3	9.8
Comparison retail	1	9.1	23.6	28.4
Financial/Professional	1	9.1	11.7	8.5
Restaurants/Cafés	1	9.1	10.3	10.7
Pubs/Bars	1	9.1	4.9	5.1
Hot food takeaways	0	0	8.4	6.4
Other non-retail services	3	27.3	22.2	16.3
Vacant	2	18.2	10.6	14.8
Total	**11**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey July 2024 and Goad Plan UK average.

Kelvedon Local Centre

Kelvedon serves the area to the southeast of Braintree and northeast of Witham. It is the second smallest local centre in the District in terms of the number of units. The centre a good choice of three convenience stores, a Boots pharmacy and an optician. The local centre has a limited selection of non-retail services including takeaways, barber, hair salon, estate agent and funeral directors.

Table OC6 - Mix of retail and service uses in Kelvedon Local Centre

Type	Number of units	% units	District average (% units)	UK average (% units)
Convenience retail	3	14.3	8.3	9.8
Comparison retail	2	13.3	23.6	28.4
Financial/Professional	1	6.7	11.7	8.5
Restaurants/Cafés	1	6.7	10.3	10.7
Pubs/Bars	1	6.7	4.9	5.1
Hot food takeaways	2	13.3	8.4	6.4
Other non-retail services	3	20.0	22.2	16.3
Vacant	2	13.3	10.6	14.8
Total	**15**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey July 2024 and Goad Plan UK average.

Sible Hedingham Local Centre

Sible Hedingham serves the area to the northwest of Halstead. It is the third smallest local centre in the District in terms of the number of units. The centre has a good selection of convenience stores including a Co-op store. The centre has a chemist, post office and hardware store. There is a limited selection of non-retail services including takeaways, café, funeral directors, barbers and hair/beauty salon.

Table OC7 - Mix of retail and service uses in Sible Hedingham Local Centre

Type	Number of units	% units	District average (% units)	UK average (% units)
Convenience retail	5	31.3	8.3	9.8
Comparison retail	3	18.8	23.6	28.4
Financial/Professional	0	0	11.7	8.5
Restaurants/Cafés	1	6.3	10.3	10.7
Pubs/Bars	0	0	4.9	5.1
Hot food takeaways	2	12.5	8.4	6.4
Other non-retail services	4	25.0	22.2	16.3
Vacant	1	6.3	10.6	14.8
Total	**16**	**100.0**	**100.0**	**100.0**

Source: Lichfields' land use survey July 2024 and Goad Plan UK average.

Maltings Lane, Witham Local Centre

Maltings Lane, Witham is a relatively new Local Centre serving residential development to the south of Witham urban area. The designated Local Centre boundary includes the Aldi store, a large public house/family restaurant and a nursery school. The centre boundary also includes undeveloped land identified for non-food retail (3,710 sq.m gross – 2,412 sq.m net).

Appendix 3 Convenience retail assessment

Table 1 - Study area population projections

Zone	2024	2031	2036	2041
1 - Braintree	62,990	64,190	65,243	66,496
2 - Rural West	49,736	52,311	53,690	54,955
3 - Witham	59,313	60,690	61,573	62,453
4 - Halstead	42,887	43,569	44,105	44,616
5 - Rural North	50,834	51,424	51,932	52,603
Total	**265,760**	**272,184**	**276,543**	**281,123**

Sources: Experian population projections 2024.

Table 2 - Convenience goods expenditure per person per annum (£)

Zone	2024	2031	2036	2041
1 - Braintree	2,355	2,318	2,315	2,321
2 - Rural West	2,566	2,525	2,521	2,529
3 - Witham	2,420	2,382	2,379	2,385
4 - Halstead	2,528	2,488	2,485	2,492
5 - Rural North	2,449	2,411	2,407	2,414

Sources:
Experian Local Expenditure 2022 (2022 prices)
Experian growth rates - Retail Planner Briefing Note 21 (February 2024)
Excludes Special Forms of Trading (SFT)

Table 3 - Total convenience goods expenditure (£M)

Zone	2024	2031	2036	2041
1 - Braintree	148.34	148.79	151.02	154.34
2 - Rural West	127.62	132.09	135.38	138.98
3 - Witham	143.54	144.56	146.45	148.95
4 - Halstead	108.42	108.41	109.58	111.18
5 - Rural North	124.49	123.97	125.01	126.98
Total	**652.41**	**657.83**	**667.44**	**680.44**

Source: Tables 1 and 2

Table 4 - Base year 2024 convenience goods market shares by zone (%)

	1 Braintree	2 Rural West	3 Witham	4 Halstead	5 Rural North	Inflow
Braintree / Zone 1/2						
Sainsbury's, Tofts Walk	12.5%	1.8%	0.9%	0.8%	0.0%	5.0%
Tesco, Market Place	13.8%	1.4%	0.2%	3.5%	0.0%	5.0%
Tesco, Marks Farm, Braintree	16.3%	1.2%	3.1%	7.4%	0.0%	5.0%
Lidl, Rayne Road, Braintree	11.0%	3.1%	0.0%	2.3%	0.0%	5.0%
Other Braintree	12.9%	1.5%	0.3%	0.4%	0.0%	5.0%
Tesco, Great Notley	21.5%	5.7%	0.1%	0.0%	0.5%	5.0%
Other Zone 1/2 in Braintree District	2.2%	3.1%	0.0%	0.0%	0.0%	2.0%
Braintree/Zone 1/2 Total	**90.2%**	**17.8%**	**4.6%**	**14.4%**	**0.5%**	**n/a**
Witham / Zone 3						
Tesco, Grove Centre	0.0%	0.0%	21.4%	0.0%	0.0%	5.0%
Other Witham Town Centre	0.8%	0.0%	0.2%	0.0%	0.0%	5.0%
Morrisons, Braintree Road, Witham	1.1%	0.3%	14.9%	0.2%	0.0%	5.0%
Asda, Highfields Road, Witham	0.1%	0.7%	10.8%	0.3%	0.0%	5.0%
Aldi, Reid Road, Witham	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Other Witham	1.5%	0.0%	12.7%	0.0%	0.0%	2.0%
Other Zone 3	0.8%	0.0%	3.4%	0.0%	0.0%	2.0%
Witham/Zone 3 Total	**4.3%**	**1.0%**	**63.4%**	**0.5%**	**0.0%**	**n/a**
Halstead Zone 4/5						
Sainsbury's, High Street	0.0%	0.0%	0.0%	11.7%	0.2%	5.0%
Co-op, Weavers Court	0.0%	0.0%	0.0%	1.1%	0.0%	5.0%
Lidl, Kings Road, Halstead	0.5%	0.0%	0.0%	27.4%	0.7%	5.0%
Other Halstead	0.0%	0.0%	0.0%	2.5%	0.0%	2.0%
Other Zone 4/5 in Braintree District	0.0%	0.0%	1.7%	9.8%	2.4%	2.0%
Halstead/Zone 4/5 Total	**0.5%**	**0.0%**	**1.7%**	**52.5%**	**3.3%**	**n/a**
Braintree District Total	**95.0%**	**18.8%**	**69.7%**	**67.4%**	**3.8%**	n/a
Bishops Stortford	0.0%	4.0%	0.0%	0.0%	0.0%	n/a
Chelmsford	2.6%	9.3%	5.3%	0.1%	0.0%	n/a
Colchester	0.7%	0.0%	6.8%	10.9%	0.0%	n/a
Dunmow - Tesco Superstore	0.0%	37.7%	0.0%	0.0%	0.0%	n/a
Sudbury	1.3%	6.4%	0.0%	17.2%	18.6%	n/a
Haverhill	0.0%	0.9%	0.0%	1.6%	68.4%	n/a
Maldon	0.4%	0.1%	2.8%	0.0%	0.0%	n/a
Tiptree	0.0%	0.0%	14.2%	0.8%	0.0%	n/a
Great Dunmow	0.0%	9.9%	0.0%	0.0%	0.0%	n/a
Other	0.0%	12.9%	1.2%	2.0%	9.2%	n/a
Other Sub-Total	**5.0%**	**81.2%**	**30.3%**	**32.6%**	**96.2%**	n/a
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	n/a

Source: NEMS Household Survey July 2024 and Lichfields' analysis.

Table 5 - Base year 2024 convenience goods expenditure patterns by zone (£M)

	1 Braintree	2 Rural West	3 Witham	4 Halstead	5 Rural North	Inflow	Total
Expenditure 2024	148.34	127.62	143.54	108.42	124.49		**652.41**
Braintree / Zone 1/2							
Sainsbury's, Tofts Walk	18.54	2.30	1.29	0.87	0.00	1.21	24.21
Tesco, Market Place	20.47	1.79	0.29	3.79	0.00	1.39	27.73
Tesco, Marks Farm, Braintree	24.18	1.53	4.45	8.02	0.00	2.01	40.19
Lidl, Rayne Road, Braintree	16.32	3.96	0.00	2.49	0.00	1.20	23.97
Other Braintree	19.14	1.91	0.43	0.43	0.00	1.15	23.07
Tesco, Great Notley	31.89	7.27	0.14	0.00	0.62	2.10	42.04
Other Zone 1/2 in Braintree District	3.26	3.96	0.00	0.00	0.00	0.15	7.37
Braintree/Zone 1/2 Total	**133.80**	**22.72**	**6.60**	**15.61**	**0.62**	**9.21**	**188.57**
Witham / Zone 3							
Tesco, Grove Centre	0.00	0.00	30.72	0.00	0.00	1.62	32.33
Other Witham Town Centre	1.19	0.00	0.29	0.00	0.00	0.08	1.55
Morrisons, Braintree Road, Witham	1.63	0.38	21.39	0.22	0.00	1.24	24.86
Asda, Highfields Road, Witham	0.15	0.89	15.50	0.33	0.00	0.89	17.76
Aldi, Reid Road, Witham	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Witham	2.23	0.00	18.23	0.00	0.00	0.42	20.87
Other Zone 3	1.19	0.00	4.88	0.00	0.00	0.12	6.19
Witham/Zone 3 Total	**6.38**	**1.28**	**91.00**	**0.54**	**0.00**	**4.37**	**103.57**
Halstead Zone 4/5							
Sainsbury's, High Street	0.00	0.00	0.00	12.68	0.25	0.68	13.61
Co-op, Weavers Court	0.00	0.00	0.00	1.19	0.00	0.06	1.26
Lidl, Kings Road, Halstead	0.74	0.00	0.00	29.71	0.87	1.65	32.97
Other Halstead	0.00	0.00	0.00	2.71	0.00	0.06	2.77
Other Zone 4/5 in Braintree District	0.00	0.00	2.44	10.62	2.99	0.33	16.38
Halstead/Zone 4/5 Total	**0.74**	**0.00**	**2.44**	**56.92**	**4.11**	**2.77**	**66.98**
Braintree District Total	**140.92**	**23.99**	**100.05**	**73.07**	**4.73**	**16.35**	**359.12**
Bishops Stortford	0.00	5.10	0.00	0.00	0.00	n/a	5.10
Chelmsford	3.86	11.87	7.61	0.11	0.00	n/a	23.44
Colchester	1.04	0.00	9.76	11.82	0.00	n/a	22.62
Dunmow - Tesco Superstore	0.00	48.11	0.00	0.00	0.00	n/a	48.11
Sudbury	1.93	8.17	0.00	18.65	23.16	n/a	51.90
Haverhill	0.00	1.15	0.00	1.73	85.15	n/a	88.04
Maldon	0.59	0.13	4.02	0.00	0.00	n/a	4.74
Tiptree	0.00	0.00	20.38	0.87	0.00	n/a	21.25
Great Dunmow	0.00	12.63	0.00	0.00	0.00	n/a	12.63
Other	0.00	16.46	1.72	2.17	11.45	n/a	31.81
Other Sub-Total	**7.42**	**103.63**	**43.49**	**35.34**	**119.76**	**n/a**	**309.64**
TOTAL	**148.34**	**127.62**	**143.54**	**108.42**	**124.49**	**n/a**	**668.76**

Source: Tables 3 and 4

Table 6 - Future 2031 convenience goods expenditure patterns by zone (£M)

	1 Braintree	2 Rural West	3 Witham	4 Halstead	5 Rural North	Inflow	Total
Expenditure 2031	148.79	132.09	144.56	108.41	123.97		**657.83**
Braintree / Zone 1/2							
Sainsbury's, Tofts Walk	18.60	2.38	1.30	0.87	0.00	1.22	24.36
Tesco, Market Place	20.53	1.85	0.29	3.79	0.00	1.39	27.86
Tesco, Marks Farm, Braintree	24.25	1.59	4.48	8.02	0.00	2.02	40.36
Lidl, Rayne Road, Braintree	16.37	4.09	0.00	2.49	0.00	1.21	24.16
Other Braintree	19.19	1.98	0.43	0.43	0.00	1.16	23.20
Tesco, Great Notley	31.99	7.53	0.14	0.00	0.62	2.12	42.40
Other Zone 1/2 in Braintree District	3.27	4.09	0.00	0.00	0.00	0.15	7.52
Braintree/Zone 1/2 Total	**134.21**	**23.51**	**6.65**	**15.61**	**0.62**	**9.27**	**189.87**
Witham / Zone 3							
Tesco, Grove Centre	0.00	0.00	30.94	0.00	0.00	1.63	32.56
Other Witham Town Centre	1.19	0.00	0.29	0.00	0.00	0.08	1.56
Morrisons, Braintree Road, Witham	1.64	0.40	21.54	0.22	0.00	1.25	25.04
Asda, Highfields Road, Witham	0.15	0.92	15.61	0.33	0.00	0.90	17.91
Aldi, Reid Road, Witham	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Witham	2.23	0.00	18.36	0.00	0.00	0.42	21.01
Other Zone 3	1.19	0.00	4.92	0.00	0.00	0.12	6.23
Witham/Zone 3 Total	**6.40**	**1.32**	**91.65**	**0.54**	**0.00**	**4.40**	**104.31**
Halstead Zone 4/5							
Sainsbury's, High Street	0.00	0.00	0.00	12.68	0.25	0.68	13.61
Co-op, Weavers Court	0.00	0.00	0.00	1.19	0.00	0.06	1.26
Lidl, Kings Road, Halstead	0.74	0.00	0.00	29.70	0.87	1.65	32.96
Other Halstead	0.00	0.00	0.00	2.71	0.00	0.06	2.77
Other Zone 4/5 in Braintree District	0.00	0.00	2.46	10.62	2.98	0.33	16.38
Halstead/Zone 4/5 Total	**0.74**	**0.00**	**2.46**	**56.91**	**4.09**	**2.77**	**66.98**
Braintree District Total	**141.35**	**24.83**	**100.76**	**73.07**	**4.71**	**16.44**	**361.16**
Bishops Stortford	0.00	5.28	0.00	0.00	0.00	n/a	5.28
Chelmsford	3.87	12.28	7.66	0.11	0.00	n/a	23.92
Colchester	1.04	0.00	9.83	11.82	0.00	n/a	22.69
Dunmow - Tesco Superstore	0.00	49.80	0.00	0.00	0.00	n/a	49.80
Sudbury	1.93	8.45	0.00	18.65	23.06	n/a	52.09
Haverhill	0.00	1.19	0.00	1.73	84.80	n/a	87.72
Maldon	0.60	0.13	4.05	0.00	0.00	n/a	4.77
Tiptree	0.00	0.00	20.53	0.87	0.00	n/a	21.39
Great Dunmow	0.00	13.08	0.00	0.00	0.00	n/a	13.08
Other	0.00	17.04	1.73	2.17	11.41	n/a	32.35
Other Sub-Total	**7.44**	**107.26**	**43.80**	**35.34**	**119.26**	**n/a**	**313.10**
TOTAL	**148.79**	**132.09**	**144.56**	**108.41**	**123.97**	**n/a**	**674.27**

Source: Tables 3 and 4

Table 7 - Future 2036 convenience goods expenditure patterns by zone (£M)

	1 Braintree	2 Rural West	3 Witham	4 Halstead	5 Rural North	Inflow	Total
Expenditure 2036	151.02	135.38	146.45	109.58	125.01		**667.44**
Braintree / Zone 1/2							
Sainsbury's, Tofts Walk	18.88	2.44	1.32	0.88	0.00	1.24	24.75
Tesco, Market Place	20.84	1.90	0.29	3.84	0.00	1.41	28.28
Tesco, Marks Farm, Braintree	24.62	1.62	4.54	8.11	0.00	2.05	40.94
Lidl, Rayne Road, Braintree	16.61	4.20	0.00	2.52	0.00	1.23	24.56
Other Braintree	19.48	2.03	0.44	0.44	0.00	1.18	23.57
Tesco, Great Notley	32.47	7.72	0.15	0.00	0.63	2.16	43.11
Other Zone 1/2 in Braintree District	3.32	4.20	0.00	0.00	0.00	0.15	7.67
Braintree/Zone 1/2 Total	**136.22**	**24.10**	**6.74**	**15.78**	**0.63**	**9.41**	**192.87**
Witham / Zone 3							
Tesco, Grove Centre	0.00	0.00	31.34	0.00	0.00	1.65	32.99
Other Witham Town Centre	1.21	0.00	0.29	0.00	0.00	0.08	1.58
Morrisons, Braintree Road, Witham	1.66	0.41	21.82	0.22	0.00	1.27	25.38
Asda, Highfields Road, Witham	0.15	0.95	15.82	0.33	0.00	0.91	18.15
Aldi, Reid Road, Witham	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Witham	2.27	0.00	18.60	0.00	0.00	0.43	21.29
Other Zone 3	1.21	0.00	4.98	0.00	0.00	0.13	6.31
Witham/Zone 3 Total	**6.49**	**1.35**	**92.85**	**0.55**	**0.00**	**4.46**	**105.70**
Halstead Zone 4/5							
Sainsbury's, High Street	0.00	0.00	0.00	12.82	0.25	0.69	13.76
Co-op, Weavers Court	0.00	0.00	0.00	1.21	0.00	0.06	1.27
Lidl, Kings Road, Halstead	0.76	0.00	0.00	30.03	0.88	1.67	33.32
Other Halstead	0.00	0.00	0.00	2.74	0.00	0.06	2.80
Other Zone 4/5 in Braintree District	0.00	0.00	2.49	10.74	3.00	0.33	16.56
Halstead/Zone 4/5 Total	**0.76**	**0.00**	**2.49**	**57.53**	**4.13**	**2.80**	**67.71**
Braintree District Total	**143.46**	**25.45**	**102.08**	**73.86**	**4.75**	**16.67**	**366.28**
Bishops Stortford	0.00	5.42	0.00	0.00	0.00	n/a	5.42
Chelmsford	3.93	12.59	7.76	0.11	0.00	n/a	24.39
Colchester	1.06	0.00	9.96	11.94	0.00	n/a	22.96
Dunmow - Tesco Superstore	0.00	51.04	0.00	0.00	0.00	n/a	51.04
Sudbury	1.96	8.66	0.00	18.85	23.25	n/a	52.73
Haverhill	0.00	1.22	0.00	1.75	85.51	n/a	88.48
Maldon	0.60	0.14	4.10	0.00	0.00	n/a	4.84
Tiptree	0.00	0.00	20.80	0.88	0.00	n/a	21.67
Great Dunmow	0.00	13.40	0.00	0.00	0.00	n/a	13.40
Other	0.00	17.46	1.76	2.19	11.50	n/a	32.91
Other Sub-Total	**7.55**	**109.93**	**44.37**	**35.72**	**120.26**	**n/a**	**317.84**
TOTAL	**151.02**	**135.38**	**146.45**	**109.58**	**125.01**	**n/a**	**684.12**

Source: Tables 3 and 4

Table 8 - Future 2041 convenience goods expenditure patterns by zone (£M)

	1 Braintree	2 Rural West	3 Witham	4 Halstead	5 Rural North	Inflow	Total
Expenditure 2041	154.34	138.98	148.95	111.18	126.98		**680.44**
Braintree / Zone 1/2							
Sainsbury's, Tofts Walk	19.29	2.50	1.34	0.89	0.00	1.26	25.29
Tesco, Market Place	21.30	1.95	0.30	3.89	0.00	1.44	28.88
Tesco, Marks Farm, Braintree	25.16	1.67	4.62	8.23	0.00	2.09	41.76
Lidl, Rayne Road, Braintree	16.98	4.31	0.00	2.56	0.00	1.25	25.10
Other Braintree	19.91	2.08	0.45	0.44	0.00	1.20	24.09
Tesco, Great Notley	33.18	7.92	0.15	0.00	0.63	2.20	44.09
Other Zone 1/2 in Braintree District	3.40	4.31	0.00	0.00	0.00	0.16	7.86
Braintree/Zone 1/2 Total	**139.21**	**24.74**	**6.85**	**16.01**	**0.63**	**9.62**	**197.07**
Witham / Zone 3							
Tesco, Grove Centre	0.00	0.00	31.88	0.00	0.00	1.68	33.55
Other Witham Town Centre	1.23	0.00	0.30	0.00	0.00	0.08	1.61
Morrisons, Braintree Road, Witham	1.70	0.42	22.19	0.22	0.00	1.29	25.82
Asda, Highfields Road, Witham	0.15	0.97	16.09	0.33	0.00	0.92	18.47
Aldi, Reid Road, Witham	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Witham	2.32	0.00	18.92	0.00	0.00	0.43	21.67
Other Zone 3	1.23	0.00	5.06	0.00	0.00	0.13	6.43
Witham/Zone 3 Total	**6.64**	**1.39**	**94.43**	**0.56**	**0.00**	**4.53**	**107.55**
Halstead Zone 4/5							
Sainsbury's, High Street	0.00	0.00	0.00	13.01	0.25	0.70	13.96
Co-op, Weavers Court	0.00	0.00	0.00	1.22	0.00	0.06	1.29
Lidl, Kings Road, Halstead	0.77	0.00	0.00	30.46	0.89	1.69	33.82
Other Halstead	0.00	0.00	0.00	2.78	0.00	0.06	2.84
Other Zone 4/5 in Braintree District	0.00	0.00	2.53	10.90	3.05	0.34	16.81
Halstead/Zone 4/5 Total	**0.77**	**0.00**	**2.53**	**58.37**	**4.19**	**2.85**	**68.71**
Braintree District Total	**146.62**	**26.13**	**103.82**	**74.94**	**4.83**	**17.00**	**373.33**
Bishops Stortford	0.00	5.56	0.00	0.00	0.00	n/a	5.56
Chelmsford	4.01	12.93	7.89	0.11	0.00	n/a	24.94
Colchester	1.08	0.00	10.13	12.12	0.00	n/a	23.33
Dunmow - Tesco Superstore	0.00	52.40	0.00	0.00	0.00	n/a	52.40
Sudbury	2.01	8.89	0.00	19.12	23.62	n/a	53.64
Haverhill	0.00	1.25	0.00	1.78	86.86	n/a	89.89
Maldon	0.62	0.14	4.17	0.00	0.00	n/a	4.93
Tiptree	0.00	0.00	21.15	0.89	0.00	n/a	22.04
Great Dunmow	0.00	13.76	0.00	0.00	0.00	n/a	13.76
Other	0.00	17.93	1.79	2.22	11.68	n/a	33.62
Other Sub-Total	**7.72**	**112.85**	**45.13**	**36.25**	**122.16**	**n/a**	**324.11**
TOTAL	**154.34**	**138.98**	**148.95**	**111.18**	**126.98**	**n/a**	**697.43**

Source: Tables 3 and 4

Table 9 - Main food stores convenience goods sales floorspace and benchmark turnover

Store	Sales floorspace (sq m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq m net)	Turnover (£ per sq m)	Total turnover (£m)
Braintree					
Sainsbury's, Tofts Walk, town centre	2,671	75%	2,003	£14,522	£29.09
Tesco, Market Place, town centre	2,815	80%	2,252	£14,511	£32.68
Iceland, Bank Street, town centre	990	95%	941	£7,872	£7.40
B&M Bargains, Raynes Road	1,682	30%	505	£2,938	£1.48
Other Braintree Town Centre	1,100	100%	1,100	£5,000	£5.50
Co-op, Bocking Churchstreet	176	95%	167	£11,174	£1.87
Co-op, Braintree Bypass	231	95%	219	£11,174	£2.45
Co-op, Brook Street, Great Bardfield	150	95%	143	£11,174	£1.59
Co-op, Challis Lane, Braintree	337	95%	320	£11,174	£3.58
Co-op, Cressing Road, Braintree	160	95%	152	£11,174	£1.70
Lidl, Rayne Road, Braintree	1,180	80%	944	£11,438	£10.80
Marks & Spencer Simply Food, Braintree Retail Park	859	95%	816	£13,137	£10.72
Morrisons Daily, Panfield Lane, Braintree	129	95%	123	£12,721	£1.56
Tesco Express, Coggeshall Road, Braintree	257	95%	244	£14,511	£3.54
Tesco, Marks Farm, Braintree	3,517	70%	2,462	£14,511	£35.72
Braintree Sub-Total	**16,254**		**12,390**		**£149.69**
Great Notley					
Co-op, Priory Lane, Great Notley	141	95%	134	£11,174	£1.50
Marks & Spencer Simply Food BP, Notley Cross	84	95%	80	£13,137	£1.05
Marks & Spencer Simply Food, Great Notley	626	95%	595	£13,137	£7.81
Tesco, Great Notley	2,674	80%	2,139	£14,511	£31.04
Great Notley Sub-Total	**3,525**		**2,948**		**£41.40**
Witham					
Tesco, Grove Centre	2,217	80%	1,774	£14,511	£25.74
Iceland, Newland Shopping Centre	323	95%	307	£7,872	£2.42
Morrisons Daily, Newland Street	129	95%	123	£12,721	£1.56
Other Witham Town Centre	400	100%	400	£5,000	£2.00
Aldi, Reid Road, Witham	987	80%	790	£14,548	£11.49
Asda, Highfields Road, Witham	979	80%	783	£14,314	£11.21
Asda Express, London Road	84	95%	80	£14,314	£1.14
Co-op, Spa Road, Witham	239	95%	227	£11,174	£2.54
Lidl, Bridge Street, Witham	1,449	80%	1,159	£11,438	£13.26
Morrisons Daily, Laurence Avenue, Witham	129	95%	123	£12,721	£1.56
Morrisons, Braintree Road, Witham	3,057	85%	2,598	£12,721	£33.05
Witham	**9,993**		**8,363**		**£105.96**
Halstead					
Sainsbury's, High Street	999	85%	849	£14,522	£12.33
Co-op, Weavers Court	1,644	80%	1,315	£11,174	£14.70
Other Halstead Town Centre	600	100%	600	£5,000	£3.00
Lidl, Kings Road, Halstead	1,296	80%	1,037	£11,438	£11.86
Co-op, Colchester Road, Halstead	231	95%	219	£11,174	£2.45
Co-op, Abels Road, Halstead	117	95%	111	£11,174	£1.24
Halstead Sub-Total	**4,887**		**4,132**		**£45.58**
Other					
Co-op, High Street, Kelvedon	297	95%	282	£11,174	£3.15
Co-op, Broadway, Silver End	912	90%	821	£11,174	£9.17
Co-op, The Street, Hatfield Peverel	293	95%	278	£11,174	£3.11
Co-op, Swan Street, Sible Hedingham	373	95%	354	£11,174	£3.96
Co-op, High Street, Earls Colne	341	95%	324	£11,174	£3.62
Co-op, East Street, Coggeshall	505	95%	480	£11,174	£5.36
Morrisons Daily, Church Street, Coggeshall	129	95%	123	£12,721	£1.56
Other Halstead/Zone 4 Sub-Total	**2,850**		**2,662**		**£29.93**
Braintree District Total	**37,509**		**30,494**		**£372.56**

Source: ORC Storepoint 2024, VOA and GlobalData estimated company average sales densities for 2023

Table 10 - Summary of convenience goods expenditure 2024 to 2041 (£m)

	2024	2031	2036	2041
Available expenditure				
Braintree	139.16	139.95	142.08	145.11
Great Notley	42.04	42.40	43.11	44.09
Witham	97.38	98.08	99.39	101.12
Halstead	50.60	50.60	51.15	51.90
Other Braintree District	29.94	30.13	30.55	31.10
Total	**359.12**	**361.16**	**366.28**	**373.33**
Turnover of existing facilities				
Braintree	149.69	151.34	152.10	152.86
Great Notley	41.40	41.86	42.07	42.28
Witham	105.96	107.13	107.67	108.21
Halstead	45.58	46.08	46.31	46.55
Other Braintree District	29.93	30.26	30.42	30.57
Total	**372.56**	**376.68**	**378.57**	**380.46**
Surplus/deficit expenditure				
Braintree	-10.53	-11.39	-10.02	-7.75
Great Notley	0.64	0.55	1.05	1.82
Witham	-8.59	-9.05	-8.28	-7.08
Halstead	5.02	4.51	4.83	5.35
Other Braintree District	0.00	-0.13	0.13	0.53
Total	**-13.45**	**-15.52**	**-12.29**	**-7.14**

Source: Tables 5 to 10 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Figure 4b

Table 11 - Convenience goods floorspace capacity up to 2041 (cumulative)

	2024	2031	2036	2041
Turnover density new floorspace (£ per sq m)	£12,000	£12,133	£12,193	£12,254
Floorspace projection (sq m net)				
Braintree	-877	-939	-822	-633
Great Notley	53	45	86	148
Witham	-715	-746	-679	-578
Halstead	419	372	396	437
Other Braintree District	0	-11	11	43
Total	**-1,121**	**-1,279**	**-1,008**	**-582**
Floorspace projection (sq m gross)				
Braintree	-1,253	-1,342	-1,174	-904
Great Notley	76	64	122	212
Witham	-1,022	-1,066	-970	-826
Halstead	598	531	566	624
Other Braintree District	1	-15	15	62
Total	**-1,601**	**-1,827**	**-1,440**	**-832**

Source: Table 11 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Figure 4b
Figures may not sum due to rounding

Appendix 4 Comparison goods assessment

Table 1 - Study area population projections

Zone	2024	2031	2036	2041
1 - Braintree	62,990	64,190	65,243	66,496
2 - Rural West	49,736	52,311	53,690	54,955
3 - Witham	59,313	60,690	61,573	62,453
4 - Halstead	42,887	43,569	44,105	44,616
5 - Rural North	50,834	51,424	51,932	52,603
Total	**265,760**	**272,184**	**276,543**	**281,123**

Sources: Experian population projections 2024.

Table 2 - Comparison goods expenditure per person per annum (£)

Zone	2024	2031	2036	2041
1 - Braintree	2,762	3,226	3,642	4,158
2 - Rural West	3,138	3,666	4,138	4,724
3 - Witham	2,795	3,265	3,686	4,208
4 - Halstead	2,956	3,453	3,898	4,450
5 - Rural North	2,790	3,259	3,679	4,200

Sources:
Experian Local Expenditure 2022 (2022 prices)
Experian growth rates - Retail Planner Briefing Note 21 (February 2024)
Excludes Special Forms of Trading (SFT)

Table 3 - Total comparison goods expenditure (£M)

Zone	2024	2031	2036	2041
1 - Braintree	173.98	207.10	237.63	276.49
2 - Rural West	156.07	191.76	222.18	259.61
3 - Witham	165.78	198.17	226.97	262.80
4 - Halstead	126.77	150.44	171.92	198.54
5 - Rural North	141.83	167.61	191.08	220.93
Total	**764.43**	**915.07**	**1,049.78**	**1,218.37**

Source: Tables 1 and 2

Table 4 - Base year 2024 comparison goods market shares by zone (%)

	1 Braintree	2 Rural West	3 Witham	4 Halstead	5 Rurla North	Inflow
Braintree - Zone 1 and 2						
Braintree Town Centre	30.3%	5.7%	4.8%	6.5%	0.1%	10.0%
Braintree Village Shopping Centre	7.8%	4.2%	4.2%	2.1%	2.2%	30.0%
Braintree Retail Park	8.6%	4.9%	2.7%	2.7%	0.1%	5.0%
Great Notley District Centre	2.7%	0.6%	0.0%	0.0%	0.0%	2.0%
Other Braintree	5.4%	1.5%	0.9%	3.9%	0.5%	2.0%
Zone 1/2 other in Braintree District	0.0%	0.2%	0.0%	0.0%	0.0%	2.0%
Braintree/Zone 1 and 2 Total	**54.8%**	**17.1%**	**12.6%**	**15.2%**	**2.9%**	
Witham - Zone 3						
Witham Town Centre	0.9%	0.1%	13.3%	0.0%	0.0%	5.0%
Other Witham	0.6%	0.0%	3.0%	0.0%	0.0%	2.0%
Zone 3 other in Braintree District	0.0%	0.0%	0.7%	0.1%	0.0%	2.0%
Witham/Zone 3 Total	**1.5%**	**0.1%**	**17.0%**	**0.1%**	**0.0%**	
Halstead - Zone 4 and 5						
Halstead Town Centre	0.5%	0.3%	0.5%	15.8%	0.5%	2.0%
Other Halstead	0.2%	0.0%	0.0%	0.4%	0.0%	2.0%
Coggeshall	0.0%	0.0%	0.0%	1.1%	0.0%	2.0%
Zone 4/5 other in Braintree District	0.1%	0.0%	0.0%	1.9%	0.2%	2.0%
Halstead/Zone 4 Total	**0.8%**	**0.3%**	**0.5%**	**19.2%**	**0.7%**	
Braintree District Total	**57.1%**	**17.5%**	**30.1%**	**34.5%**	**3.6%**	
Bishops Stortford	0.0%	6.7%	0.0%	0.0%	0.0%	n/a
Bury St Edmunds	0.4%	1.7%	0.1%	1.3%	17.3%	n/a
Cambridge	0.0%	7.4%	0.0%	0.4%	17.1%	n/a
Chelmsford	25.7%	27.2%	35.6%	3.2%	0.1%	n/a
Colchester	9.3%	1.4%	22.2%	42.8%	3.5%	n/a
Harlow	0.5%	7.6%	0.0%	0.0%	0.0%	n/a
Haverrhill	1.2%	1.8%	0.0%	0.9%	39.9%	n/a
Lakeside, Thurrock	0.8%	2.8%	2.0%	0.2%	0.0%	n/a
Maldon	0.0%	0.0%	3.3%	0.2%	0.0%	n/a
Sudbury	0.2%	0.1%	0.0%	12.8%	13.8%	n/a
Other	4.8%	25.8%	6.7%	3.7%	4.7%	n/a
Other Sub-Total	**42.9%**	**82.5%**	**69.9%**	**65.5%**	**96.4%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey July 2024 and Lichfields' analysis.

Table 5 - Base year 2024 comparison goods expenditure patterns by zone (£M)

	1 Braintree	2 Rural West	3 Witham	4 Halstead	5 Rural North	Inflow	Total
Expenditure 2024	173.98	156.07	165.78	126.77	141.83		**764.43**
Braintree - Zone 1 and 2							
Braintree Town Centre	52.72	8.90	7.96	8.24	0.14	8.66	86.61
Braintree Village Shopping Centre	13.57	6.56	6.96	2.66	3.12	14.09	46.96
Braintree Retail Park	14.96	7.65	4.48	3.42	0.14	1.61	32.26
Great Notley District Centre	4.70	0.94	0.00	0.00	0.00	0.11	5.75
Other Braintree	9.39	2.34	1.49	4.94	0.71	0.39	19.27
Zone 1/2 other in Braintree District	0.00	0.31	0.00	0.00	0.00	0.01	0.32
Braintree/Zone 1 and 2 Total	**95.34**	**26.69**	**20.89**	**19.27**	**4.11**	**24.87**	**191.17**
Witham - Zone 3							
Witham Town Centre	1.57	0.16	22.05	0.00	0.00	1.25	25.02
Other Witham	1.04	0.00	4.97	0.00	0.00	0.12	6.14
Zone 3 other in Braintree District	0.00	0.00	1.16	0.13	0.00	0.03	1.31
Witham/Zone 3 Total	**2.61**	**0.16**	**28.18**	**0.13**	**0.00**	**1.40**	**32.48**
Halstead - Zone 4 and 5							
Halstead Town Centre	0.87	0.47	0.83	20.03	0.71	0.47	23.37
Other Halstead	0.35	0.00	0.00	0.51	0.00	0.02	0.87
Coggeshall	0.00	0.00	0.00	1.39	0.00	0.03	1.42
Zone 4/5 other in Braintree District	0.17	0.00	0.00	2.41	0.28	0.06	2.92
Halstead/Zone 4 Total	**1.39**	**0.47**	**0.83**	**24.34**	**0.99**	**0.57**	**28.59**
Braintree District Total	**99.34**	**27.31**	**49.90**	**43.74**	**5.11**	**26.84**	**252.24**
Bishops Stortford	0.00	10.46	0.00	0.00	0.00	n/a	10.46
Bury St Edmunds	0.70	2.65	0.17	1.65	24.54	n/a	29.70
Cambridge	0.00	11.55	0.00	0.51	24.25	n/a	36.31
Chelmsford	44.71	42.45	59.02	4.06	0.14	n/a	150.38
Colchester	16.18	2.19	36.80	54.26	4.96	n/a	114.39
Harlow	0.87	11.86	0.00	0.00	0.00	n/a	12.73
Haverrhill	2.09	2.81	0.00	1.14	56.59	n/a	62.63
Lakeside, Thurrock	1.39	4.37	3.32	0.25	0.00	n/a	9.33
Maldon	0.00	0.00	5.47	0.25	0.00	n/a	5.72
Sudbury	0.35	0.16	0.00	16.23	19.57	n/a	36.30
Other	8.35	40.27	11.11	4.69	6.67	n/a	71.08
Other Sub-Total	**74.64**	**128.76**	**115.88**	**83.04**	**136.72**	**n/a**	**539.03**
TOTAL	**173.98**	**156.07**	**165.78**	**126.77**	**141.83**	**26.84**	**791.27**

Source: Tables 3 and 4

Table 6 - Future 2031 comparison goods expenditure patterns by zone (£M)

	1 Braintree	2 Rural West	3 Witham	4 Halstead	5 Rural North	Inflow	Total
Expenditure 2031	207.10	191.76	198.17	150.44	167.61		**915.07**
Braintree - Zone 1 and 2							
Braintree Town Centre	62.75	10.93	9.51	9.78	0.17	10.35	103.49
Braintree Village Shopping Centre	16.15	8.05	8.32	3.16	3.69	16.88	56.25
Braintree Retail Park	17.81	9.40	5.35	4.06	0.17	1.94	38.72
Great Notley District Centre	5.59	1.15	0.00	0.00	0.00	0.14	6.88
Other Braintree	11.18	2.88	1.78	5.87	0.84	0.46	23.01
Zone 1/2 other in Braintree District	0.00	0.38	0.00	0.00	0.00	0.01	0.39
Braintree/Zone 1 and 2 Total	**113.49**	**32.79**	**24.97**	**22.87**	**4.86**	**29.77**	**228.75**
Witham - Zone 3							
Witham Town Centre	1.86	0.19	26.36	0.00	0.00	1.50	29.91
Other Witham	1.24	0.00	5.95	0.00	0.00	0.15	7.33
Zone 3 other in Braintree District	0.00	0.00	1.39	0.15	0.00	0.03	1.57
Witham/Zone 3 Total	**3.11**	**0.19**	**33.69**	**0.15**	**0.00**	**1.67**	**38.81**
Halstead - Zone 4 and 5							
Halstead Town Centre	1.04	0.58	0.99	23.77	0.84	0.56	27.76
Other Halstead	0.41	0.00	0.00	0.60	0.00	0.02	1.04
Coggeshall	0.00	0.00	0.00	1.65	0.00	0.03	1.69
Zone 4/5 other in Braintree District	0.21	0.00	0.00	2.86	0.34	0.07	3.47
Halstead/Zone 4 Total	**1.66**	**0.58**	**0.99**	**28.88**	**1.17**	**0.68**	**33.96**
Braintree District Total	**118.26**	**33.56**	**59.65**	**51.90**	**6.03**	**32.12**	**301.52**
Bishops Stortford	0.00	12.85	0.00	0.00	0.00	n/a	12.85
Bury St Edmunds	0.83	3.26	0.20	1.96	29.00	n/a	35.24
Cambridge	0.00	14.19	0.00	0.60	28.66	n/a	43.45
Chelmsford	53.23	52.16	70.55	4.81	0.17	n/a	180.91
Colchester	19.26	2.68	43.99	64.39	5.87	n/a	136.19
Harlow	1.04	14.57	0.00	0.00	0.00	n/a	15.61
Haverrhill	2.49	3.45	0.00	1.35	66.88	n/a	74.17
Lakeside, Thurrock	1.66	5.37	3.96	0.30	0.00	n/a	11.29
Maldon	0.00	0.00	6.54	0.30	0.00	n/a	6.84
Sudbury	0.41	0.19	0.00	19.26	23.13	n/a	42.99
Other	9.94	49.47	13.28	5.57	7.88	n/a	86.14
Other Sub-Total	**88.85**	**158.20**	**138.52**	**98.54**	**161.58**	**n/a**	**645.68**
TOTAL	**207.10**	**191.76**	**198.17**	**150.44**	**167.61**	**32.12**	**947.19**

Source: Tables 3 and 4

Table 7 - Future 2036 comparison goods expenditure patterns by zone (£M)

	1 Braintree	2 Rural West	3 Witham	4 Halstead	5 Rural North	Inflow	Total
Expenditure 2036	237.63	222.18	226.97	171.92	191.08		**1,049.78**
Braintree - Zone 1 and 2							
Braintree Town Centre	72.00	12.66	10.89	11.17	0.19	11.88	118.81
Braintree Village Shopping Centre	18.54	9.33	9.53	3.61	4.20	19.38	64.59
Braintree Retail Park	20.44	10.89	6.13	4.64	0.19	2.23	44.51
Great Notley District Centre	6.42	1.33	0.00	0.00	0.00	0.16	7.91
Other Braintree	12.83	3.33	2.04	6.70	0.96	0.53	26.40
Zone 1/2 other in Braintree District	0.00	0.44	0.00	0.00	0.00	0.01	0.45
Braintree/Zone 1 and 2 Total	**130.22**	**37.99**	**28.60**	**26.13**	**5.54**	**34.18**	**262.67**
Witham - Zone 3							
Witham Town Centre	2.14	0.22	30.19	0.00	0.00	1.71	34.26
Other Witham	1.43	0.00	6.81	0.00	0.00	0.17	8.40
Zone 3 other in Braintree District	0.00	0.00	1.59	0.17	0.00	0.04	1.80
Witham/Zone 3 Total	**3.56**	**0.22**	**38.58**	**0.17**	**0.00**	**1.92**	**44.46**
Halstead - Zone 4 and 5							
Halstead Town Centre	1.19	0.67	1.13	27.16	0.96	0.63	31.74
Other Halstead	0.48	0.00	0.00	0.69	0.00	0.02	1.19
Coggeshall	0.00	0.00	0.00	1.89	0.00	0.04	1.93
Zone 4/5 other in Braintree District	0.24	0.00	0.00	3.27	0.38	0.08	3.97
Halstead/Zone 4 Total	**1.90**	**0.67**	**1.13**	**33.01**	**1.34**	**0.78**	**38.82**
Braintree District Total	**135.69**	**38.88**	**68.32**	**59.31**	**6.88**	**36.87**	**345.95**
Bishops Stortford	0.00	14.89	0.00	0.00	0.00	n/a	14.89
Bury St Edmunds	0.95	3.78	0.23	2.23	33.06	n/a	40.25
Cambridge	0.00	16.44	0.00	0.69	32.68	n/a	49.80
Chelmsford	61.07	60.43	80.80	5.50	0.19	n/a	208.00
Colchester	22.10	3.11	50.39	73.58	6.69	n/a	155.87
Harlow	1.19	16.89	0.00	0.00	0.00	n/a	18.07
Haverrhill	2.85	4.00	0.00	1.55	76.24	n/a	84.64
Lakeside, Thurrock	1.90	6.22	4.54	0.34	0.00	n/a	13.01
Maldon	0.00	0.00	7.49	0.34	0.00	n/a	7.83
Sudbury	0.48	0.22	0.00	22.01	26.37	n/a	49.07
Other	11.41	57.32	15.21	6.36	8.98	n/a	99.28
Other Sub-Total	**101.95**	**183.30**	**158.65**	**112.61**	**184.20**	**n/a**	**740.71**
TOTAL	**237.63**	**222.18**	**226.97**	**171.92**	**191.08**	**36.87**	**1,086.66**

Source: Tables 3 and 4

Table 8 - Future 2041 comparison goods expenditure patterns by zone (£M)

	1 Braintree	2 Rural West	3 Witham	4 Halstead	5 Rural North	Inflow	Total
Expenditure 2041	276.49	259.61	262.80	198.54	220.93		**1,218.37**
Braintree - Zone 1 and 2							
Braintree Town Centre	83.78	14.80	12.61	12.91	0.22	13.81	138.13
Braintree Village Shopping Centre	21.57	10.90	11.04	4.17	4.86	22.52	75.05
Braintree Retail Park	23.78	12.72	7.10	5.36	0.22	2.59	51.76
Great Notley District Centre	7.47	1.56	0.00	0.00	0.00	0.18	9.21
Other Braintree	14.93	3.89	2.37	7.74	1.10	0.61	30.65
Zone 1/2 other in Braintree District	0.00	0.52	0.00	0.00	0.00	0.01	0.53
Braintree/Zone 1 and 2 Total	**151.52**	**44.39**	**33.11**	**30.18**	**6.41**	**39.72**	**305.33**
Witham - Zone 3							
Witham Town Centre	2.49	0.26	34.95	0.00	0.00	1.98	39.68
Other Witham	1.66	0.00	7.88	0.00	0.00	0.19	9.74
Zone 3 other in Braintree District	0.00	0.00	1.84	0.20	0.00	0.04	2.08
Witham/Zone 3 Total	**4.15**	**0.26**	**44.68**	**0.20**	**0.00**	**2.22**	**51.50**
Halstead - Zone 4 and 5							
Halstead Town Centre	1.38	0.78	1.31	31.37	1.10	0.73	36.68
Other Halstead	0.55	0.00	0.00	0.79	0.00	0.03	1.37
Coggeshall	0.00	0.00	0.00	2.18	0.00	0.04	2.23
Zone 4/5 other in Braintree District	0.28	0.00	0.00	3.77	0.44	0.09	4.58
Halstead/Zone 4 Total	**2.21**	**0.78**	**1.31**	**38.12**	**1.55**	**0.90**	**44.87**
Braintree District Total	**157.88**	**45.43**	**79.10**	**68.50**	**7.95**	**42.84**	**401.70**
Bishops Stortford	0.00	17.39	0.00	0.00	0.00	n/a	17.39
Bury St Edmunds	1.11	4.41	0.26	2.58	38.22	n/a	46.58
Cambridge	0.00	19.21	0.00	0.79	37.78	n/a	57.78
Chelmsford	71.06	70.61	93.56	6.35	0.22	n/a	241.80
Colchester	25.71	3.63	58.34	84.98	7.73	n/a	180.40
Harlow	1.38	19.73	0.00	0.00	0.00	n/a	21.11
Haverrhill	3.32	4.67	0.00	1.79	88.15	n/a	97.93
Lakeside, Thurrock	2.21	7.27	5.26	0.40	0.00	n/a	15.13
Maldon	0.00	0.00	8.67	0.40	0.00	n/a	9.07
Sudbury	0.55	0.26	0.00	25.41	30.49	n/a	56.71
Other	13.27	66.98	17.61	7.35	10.38	n/a	115.59
Other Sub-Total	**118.61**	**214.18**	**183.70**	**130.04**	**212.98**	**n/a**	**859.51**
TOTAL	**276.49**	**259.61**	**262.80**	**198.54**	**220.93**	**42.84**	**1,261.22**

Source: Tables 3 and 4

Table 9 - Braintree District's comparsion goods units and floorspace in main destinations

	Number of units	Sales floorspace sq.m (net)
Braintree town centre	61	9,359
Braintree food stores (non-food sales floorspace)	n/a	3,864
Great Notley food store (non-food sales floorspace)	n/a	577
Braintree Village Shopping Centre	66	14,000
Braintree Retail Park	10	10,000
Witham town centre	40	5,348
Witham food stores (non-food sales floorspace)	n/a	1,630
Halstead town centre	39	3,724
Halstead food stores (non-food sales floorspace)	n/a	755
Local centres	20	n/a
Braintree District Total	**236**	**49,257**

Source: Lichfields' survey July 2024 and VOA

Table 10 - Summary of comparison goods expenditure 2024 to 2041 (£m)

	2024	2031	2036	2041
Available expenditure				
Braintree	138.14	165.22	189.71	220.54
Great Notley	5.75	6.88	7.91	9.21
Braintree Village Shopping Centre	46.96	56.25	64.59	75.05
Witham	31.16	37.24	42.66	49.42
Halstead	24.25	28.80	32.93	38.06
Other Braintree District	5.98	7.12	8.15	9.42
Total	**252.24**	**301.52**	**345.95**	**401.70**
Turnover of existing facilities				
Braintree	138.14	163.56	185.96	211.42
Great Notley	5.75	6.81	7.74	8.80
Braintree Village Shopping Centre	46.96	55.60	63.21	71.87
Witham	31.16	36.90	41.95	47.69
Halstead	24.25	28.71	32.64	37.11
Other Braintree District	5.98	7.08	8.05	9.15
Total	**252.24**	**298.65**	**339.54**	**386.04**
Surplus/deficit expenditure				
Braintree	-	1.66	3.76	9.12
Great Notley	-	0.07	0.17	0.41
Braintree Village Shopping Centre	-	0.66	1.38	3.19
Witham	-	0.35	0.72	1.73
Halstead	-	0.09	0.29	0.95
Other Braintree District	-	0.04	0.10	0.27
Total	**-**	**2.87**	**6.41**	**15.66**

Source: Tables 5 to 9 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Figure 4b

Table 11 - Comparsion goods floorspace capacity up to 2041 (cumulative)

	2024	2031	2036	2041
Turnover density new floorspace (£ per sq m)	£6,000	£7,104	£8,077	£9,183
Floorspace projection (sq m net)				
Braintree	0	234	465	993
Great Notley	0	10	21	45
Braintree Village Shopping Centre	0	92	171	347
Witham	0	49	89	188
Halstead	0	13	36	103
Other Braintree District	0	5	12	29
Total	**0**	**404**	**793**	**1,706**
Floorspace projection (sq m gross)				
Braintree	0	334	664	1,419
Great Notley	0	15	30	64
Braintree Village Shopping Centre	0	132	244	496
Witham	0	70	127	269
Halstead	0	19	51	148
Other Braintree District	0	8	17	42
Total	**0**	**577**	**1,133**	**2,437**

Source: Table 11 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Figure 4b
Figures may not sum due to rounding

Appendix 5 Food/beverage assessment

Table 1 - Study area population projections

Zone	2024	2031	2036	2041
1 - Braintree	62,990	64,190	65,243	66,496
2 - Rural West	49,736	52,311	53,690	54,955
3 - Witham	59,313	60,690	61,573	62,453
4 - Halstead	42,887	43,569	44,105	44,616
5 - Rural North	50,834	51,424	51,932	52,603
Total	**265,760**	**272,184**	**276,543**	**281,123**

Sources: Experian population projections 2024.

Table 2 - Food / beverage expenditure per person per annum (£)

Zone	2024	2031	2036	2041
1 - Braintree	1,688	1,808	1,881	1,957
2 - Rural West	1,768	1,894	1,971	2,051
3 - Witham	1,660	1,778	1,850	1,925
4 - Halstead	1,644	1,761	1,833	1,907
5 - Rural North	1,558	1,668	1,736	1,807

Sources:
Experian Local Expenditure 2022 (2022 prices)
Experian growth rates - Retail Planner Briefing Note 21 (February 2024)

Table 3 - Total food / beverage expenditure (£M)

Zone	2024	2031	2036	2041
1 - Braintree	106.33	116.03	122.72	130.13
2 - Rural West	87.93	99.08	105.82	112.71
3 - Witham	98.46	107.91	113.93	120.22
4 - Halstead	70.51	76.73	80.83	85.08
5 - Rural North	79.20	85.80	90.17	95.05
Total	**442.43**	**485.54**	**513.47**	**543.20**

Source: Tables 1 and 2

Table 4 - Base year 2024 food and beverage market shares by zone (%)

	1 Braintree	2 Rural West	3 Witham	4 Halstead	5 Rural North	Inflow
Braintree/Zone 1/2						
Braintree Town Centre	38.2%	7.2%	5.8%	3.3%	0.7%	10.0%
Braintree Village Shopping Centre	4.6%	0.3%	0.5%	1.4%	0.0%	30.0%
Other Braintree	11.0%	7.5%	2.2%	6.7%	1.0%	5.0%
Great Notley	7.7%	0.0%	0.3%	0.1%	0.0%	2.0%
Other Zone 1/2 in Braintree District	14.3%	11.9%	1.0%	2.5%	4.2%	2.0%
Braintree/Zone 1/2 Total	**75.8%**	**26.9%**	**9.8%**	**14.0%**	**5.9%**	**n/a**
Witham/Zone 3						
Witham	0.5%	0.4%	34.0%	0.0%	0.0%	5.0%
Hatfield Peverel	0.0%	0.8%	5.6%	0.0%	0.0%	2.0%
Other Zone 3 in Braintree District	0.4%	0.0%	9.6%	1.4%	0.0%	2.0%
Witham/Zone 3 Total	**0.9%**	**1.2%**	**49.2%**	**1.4%**	**0.0%**	**n/a**
Halstead/Zone 4 and 5						
Halstead	2.2%	0.0%	0.0%	21.6%	0.0%	2.0%
Coggeshall	0.7%	0.0%	0.0%	4.9%	0.0%	2.0%
Other Zone 4/5 in Braintree District	2.1%	0.0%	0.0%	12.5%	14.8%	2.0%
Halstead/Zone 4 Total	**5.0%**	**0.0%**	**0.0%**	**39.0%**	**14.8%**	**n/a**
Braintree District Total	**81.7%**	**28.1%**	**59.0%**	**54.4%**	**20.7%**	
Bury St Edmunds	0.0%	0.0%	0.0%	0.0%	11.8%	n/a
Cambridge	0.0%	3.2%	0.0%	0.0%	6.0%	n/a
Chelmsford	3.7%	9.7%	10.8%	1.1%	0.0%	n/a
Colchester	0.3%	0.0%	3.5%	6.1%	0.3%	n/a
Great Dunmow	0.9%	22.6%	0.6%	0.0%	0.0%	n/a
Haverrhill	0.0%	0.9%	0.0%	2.5%	22.0%	n/a
London	1.0%	5.5%	1.0%	5.4%	3.4%	n/a
Sudbury	0.0%	0.0%	0.0%	1.8%	4.9%	n/a
Other	12.4%	30.0%	25.1%	28.7%	30.9%	n/a
Other Sub-Total	**18.3%**	**71.9%**	**41.0%**	**45.6%**	**79.3%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey July 2024 and Lichfields' analysis.

Table 5 - Base year 2024 food / beverage expenditure patterns by zone (£M)

	1 Braintree	2 Rural West	3 Witham	4 Halstead	5 Rural North	Inflow	Total
Expenditure 2024	106.33	87.93	98.46	70.51	79.20		**442.43**
Braintree/Zone 1/2							
Braintree Town Centre	40.62	6.33	5.71	2.33	0.55	6.17	61.71
Braintree Village Shopping Centre	4.89	0.26	0.49	0.99	0.00	2.84	9.48
Other Braintree	11.70	6.59	2.17	4.72	0.79	1.37	27.34
Great Notley	8.19	0.00	0.30	0.07	0.00	0.17	8.73
Other Zone 1/2 in Braintree District	15.20	10.46	0.98	1.76	3.33	0.65	32.39
Braintree/Zone 1/2 Total	**80.60**	**23.65**	**9.65**	**9.87**	**4.67**	**11.20**	**139.65**
Witham/Zone 3							
Witham	0.53	0.35	33.48	0.00	0.00	1.81	36.17
Hatfield Peverel	0.00	0.70	5.51	0.00	0.00	0.13	6.34
Other Zone 3 in Braintree District	0.43	0.00	9.45	0.99	0.00	0.22	11.09
Witham/Zone 3 Total	**0.96**	**1.06**	**48.44**	**0.99**	**0.00**	**2.16**	**53.60**
Halstead/Zone 4 and 5							
Halstead	2.34	0.00	0.00	15.23	0.00	0.36	17.93
Coggeshall	0.74	0.00	0.00	3.45	0.00	0.09	4.28
Other Zone 4/5 in Braintree District	2.23	0.00	0.00	8.81	11.72	0.46	23.23
Halstead/Zone 4 Total	**5.32**	**0.00**	**0.00**	**27.50**	**11.72**	**0.91**	**45.44**
Braintree District Total	**86.87**	**24.71**	**58.09**	**38.36**	**16.39**	**14.27**	**238.69**
Bury St Edmunds	0.00	0.00	0.00	0.00	9.35	n/a	9.35
Cambridge	0.00	2.81	0.00	0.00	4.75	n/a	7.57
Chelmsford	3.93	8.53	10.63	0.78	0.00	n/a	23.87
Colchester	0.32	0.00	3.45	4.30	0.24	n/a	8.30
Great Dunmow	0.96	19.87	0.59	0.00	0.00	n/a	21.42
Haverrhill	0.00	0.79	0.00	1.76	17.42	n/a	19.98
London	1.06	4.84	0.98	3.81	2.69	n/a	13.38
Sudbury	0.00	0.00	0.00	1.27	3.88	n/a	5.15
Other	13.18	26.38	24.71	20.24	24.47	n/a	108.99
Other Sub-Total	**19.46**	**63.22**	**40.37**	**32.15**	**62.81**	**n/a**	**218.01**
TOTAL	**106.33**	**87.93**	**98.46**	**70.51**	**79.20**	**n/a**	**456.70**

Source : Table 3 and Table 4

Table 6 - Future 2031 food / beverage expenditure patterns by zone (£M)

	1 Braintree	2 Rural West	3 Witham	4 Halstead	5 Rural North	Inflow	Total
Expenditure 2031	116.03	99.08	107.91	76.73	85.80		**485.54**
Braintree/Zone 1/2							
Braintree Town Centre	44.32	7.13	6.26	2.53	0.60	6.76	67.61
Braintree Village Shopping Centre	5.34	0.30	0.54	1.07	0.00	3.11	10.35
Other Braintree	12.76	7.43	2.37	5.14	0.86	1.50	30.07
Great Notley	8.93	0.00	0.32	0.08	0.00	0.19	9.53
Other Zone 1/2 in Braintree District	16.59	11.79	1.08	1.92	3.60	0.71	35.70
Braintree/Zone 1/2 Total	**87.95**	**26.65**	**10.58**	**10.74**	**5.06**	**12.28**	**153.25**
Witham/Zone 3							
Witham	0.58	0.40	36.69	0.00	0.00	1.98	39.65
Hatfield Peverel	0.00	0.79	6.04	0.00	0.00	0.14	6.98
Other Zone 3 in Braintree District	0.46	0.00	10.36	1.07	0.00	0.24	12.14
Witham/Zone 3 Total	**1.04**	**1.19**	**53.09**	**1.07**	**0.00**	**2.36**	**58.76**
Halstead/Zone 4 and 5							
Halstead	2.55	0.00	0.00	16.57	0.00	0.39	19.52
Coggeshall	0.81	0.00	0.00	3.76	0.00	0.09	4.67
Other Zone 4/5 in Braintree District	2.44	0.00	0.00	9.59	12.70	0.50	25.23
Halstead/Zone 4 Total	**5.80**	**0.00**	**0.00**	**29.93**	**12.70**	**0.99**	**49.41**
Braintree District Total	**94.79**	**27.84**	**63.67**	**41.74**	**17.76**	**15.63**	**261.43**
Bury St Edmunds	0.00	0.00	0.00	0.00	10.12	n/a	10.12
Cambridge	0.00	3.17	0.00	0.00	5.15	n/a	8.32
Chelmsford	4.29	9.61	11.65	0.84	0.00	n/a	26.40
Colchester	0.35	0.00	3.78	4.68	0.26	n/a	9.06
Great Dunmow	1.04	22.39	0.65	0.00	0.00	n/a	24.08
Haverrhill	0.00	0.89	0.00	1.92	18.88	n/a	21.69
London	1.16	5.45	1.08	4.14	2.92	n/a	14.75
Sudbury	0.00	0.00	0.00	1.38	4.20	n/a	5.59
Other	14.39	29.72	27.09	22.02	26.51	n/a	119.73
Other Sub-Total	**21.23**	**71.24**	**44.24**	**34.99**	**68.04**	**n/a**	**239.74**
TOTAL	**116.03**	**99.08**	**107.91**	**76.73**	**85.80**	**n/a**	**501.17**

Source : Table 3 and Table 4

Table 7 - Future 2036 food / beverage expenditure patterns by zone (£M)

	1 Braintree	2 Rural West	3 Witham	4 Halstead	5 Rural North	Inflow	Total
Expenditure 2036	122.72	105.82	113.93	80.83	90.17		**513.47**
Braintree/Zone 1/2							
Braintree Town Centre	46.88	7.62	6.61	2.67	0.63	7.16	71.56
Braintree Village Shopping Centre	5.65	0.32	0.57	1.13	0.00	3.28	10.95
Other Braintree	13.50	7.94	2.51	5.42	0.90	1.59	31.85
Great Notley	9.45	0.00	0.34	0.08	0.00	0.20	10.07
Other Zone 1/2 in Braintree District	17.55	12.59	1.14	2.02	3.79	0.76	37.85
Braintree/Zone 1/2 Total	**93.02**	**28.47**	**11.17**	**11.32**	**5.32**	**12.99**	**162.28**
Witham/Zone 3							
Witham	0.61	0.42	38.74	0.00	0.00	2.09	41.87
Hatfield Peverel	0.00	0.85	6.38	0.00	0.00	0.15	7.37
Other Zone 3 in Braintree District	0.49	0.00	10.94	1.13	0.00	0.26	12.82
Witham/Zone 3 Total	**1.10**	**1.27**	**56.05**	**1.13**	**0.00**	**2.50**	**62.06**
Halstead/Zone 4 and 5							
Halstead	2.70	0.00	0.00	17.46	0.00	0.41	20.57
Coggeshall	0.86	0.00	0.00	3.96	0.00	0.10	4.92
Other Zone 4/5 in Braintree District	2.58	0.00	0.00	10.10	13.34	0.53	26.56
Halstead/Zone 4 Total	**6.14**	**0.00**	**0.00**	**31.53**	**13.34**	**1.04**	**52.05**
Braintree District Total	**100.27**	**29.74**	**67.22**	**43.97**	**18.66**	**16.53**	**276.39**
Bury St Edmunds	0.00	0.00	0.00	0.00	10.64	n/a	10.64
Cambridge	0.00	3.39	0.00	0.00	5.41	n/a	8.80
Chelmsford	4.54	10.26	12.30	0.89	0.00	n/a	28.00
Colchester	0.37	0.00	3.99	4.93	0.27	n/a	9.56
Great Dunmow	1.10	23.92	0.68	0.00	0.00	n/a	25.70
Haverrhill	0.00	0.95	0.00	2.02	19.84	n/a	22.81
London	1.23	5.82	1.14	4.37	3.07	n/a	15.62
Sudbury	0.00	0.00	0.00	1.46	4.42	n/a	5.87
Other	15.22	31.75	28.60	23.20	27.86	n/a	126.62
Other Sub-Total	**22.46**	**76.09**	**46.71**	**36.86**	**71.50**	**n/a**	**253.62**
TOTAL	**122.72**	**105.82**	**113.93**	**80.83**	**90.17**	**n/a**	**530.00**

Source : Table 3 and Table 4

Table 8 - Future 2041 food / beverage expenditure patterns by zone (£M)

	1 Braintree	2 Rural West	3 Witham	4 Halstead	5 Rural North	Inflow	Total
Expenditure 2041	130.13	112.71	120.22	85.08	95.05		**543.20**
Braintree/Zone 1/2							
Braintree Town Centre	49.71	8.12	6.97	2.81	0.67	7.59	75.86
Braintree Village Shopping Centre	5.99	0.34	0.60	1.19	0.00	3.48	11.60
Other Braintree	14.31	8.45	2.64	5.70	0.95	1.69	33.75
Great Notley	10.02	0.00	0.36	0.09	0.00	0.21	10.68
Other Zone 1/2 in Braintree District	18.61	13.41	1.20	2.13	3.99	0.80	40.15
Braintree/Zone 1/2 Total	**98.64**	**30.32**	**11.78**	**11.91**	**5.61**	**13.77**	**172.03**
Witham/Zone 3							
Witham	0.65	0.45	40.88	0.00	0.00	2.21	44.19
Hatfield Peverel	0.00	0.90	6.73	0.00	0.00	0.16	7.79
Other Zone 3 in Braintree District	0.52	0.00	11.54	1.19	0.00	0.27	13.52
Witham/Zone 3 Total	**1.17**	**1.35**	**59.15**	**1.19**	**0.00**	**2.64**	**65.50**
Halstead/Zone 4 and 5							
Halstead	2.86	0.00	0.00	18.38	0.00	0.43	21.67
Coggeshall	0.91	0.00	0.00	4.17	0.00	0.10	5.18
Other Zone 4/5 in Braintree District	2.73	0.00	0.00	10.64	14.07	0.56	28.00
Halstead/Zone 4 Total	**6.51**	**0.00**	**0.00**	**33.18**	**14.07**	**1.10**	**54.85**
Braintree District Total	**106.32**	**31.67**	**70.93**	**46.28**	**19.68**	**17.50**	**292.38**
Bury St Edmunds	0.00	0.00	0.00	0.00	11.22	n/a	11.22
Cambridge	0.00	3.61	0.00	0.00	5.70	n/a	9.31
Chelmsford	4.81	10.93	12.98	0.94	0.00	n/a	29.67
Colchester	0.39	0.00	4.21	5.19	0.29	n/a	10.07
Great Dunmow	1.17	25.47	0.72	0.00	0.00	n/a	27.37
Haverrhill	0.00	1.01	0.00	2.13	20.91	n/a	24.05
London	1.30	6.20	1.20	4.59	3.23	n/a	16.53
Sudbury	0.00	0.00	0.00	1.53	4.66	n/a	6.19
Other	16.14	33.81	30.18	24.42	29.37	n/a	133.92
Other Sub-Total	**23.81**	**81.04**	**49.29**	**38.80**	**75.38**	**n/a**	**268.32**
TOTAL	**130.13**	**112.71**	**120.22**	**85.08**	**95.05**	**n/a**	**560.70**

Source : Table 3 and Table 4

Table 9 - Braintree District's food and beverage units and floorspace in main destinations

	Number of Outlets	Floorspace sq.m (gross)
Braintree town centre	52	7,830
Braintree Village Shopping Centre	7	2,000
Braintree Retail Park	7	2,706
Witham town centre	45	6,900
Halstead town centre	35	5,010
District and local centre	28	n/a
Braintree District Total	**174**	**24,446**

Source: Lichfields' survey July 2024 and VOA

Table 10 - Summary of food / beverage expenditure 2024 to 2041 (£m)

	2024	2031	2036	2041
Available expenditure				
Braintree	89.05	97.68	103.41	109.61
Braintree Village Shopping Centre	9.48	10.35	10.95	11.60
Great Notley	8.73	9.53	10.07	10.68
Witham	36.17	39.65	41.87	44.19
Halstead	17.93	19.52	20.57	21.67
Other Braintree District	77.34	84.71	89.51	94.64
Total	**238.69**	**261.43**	**276.39**	**292.38**
Turnover of existing facilities				
Braintree	89.05	91.48	92.40	93.33
Braintree Village Shopping Centre	9.48	9.74	9.83	9.93
Great Notley	8.73	8.97	9.06	9.15
Witham	36.17	37.16	37.53	37.91
Halstead	17.93	18.42	18.60	18.79
Other Braintree District	77.34	79.45	80.25	81.05
Total	**238.69**	**245.21**	**247.67**	**250.15**
Surplus/deficit expenditure				
Braintree	-	6.20	11.01	16.28
Braintree Village Shopping Centre	-	0.62	1.11	1.66
Great Notley	-	0.56	1.02	1.53
Witham	-	2.49	4.34	6.28
Halstead	-	1.10	1.97	2.89
Other Braintree District	-	5.26	9.27	13.59
Total	**-**	**16.23**	**28.72**	**42.23**

Source: Tables 5 to 9 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Leisure Figure 2

Table 11 - Food / beverage floorspace capacity up to 2041 (cumulative)

	2024	2031	2036	2041
Turnover density new floorspace (£ per sq m)	£6,000	£6,164	£6,226	£6,288
Floorspace projection (sq m gross)				
Braintree	0	1,005	1,769	2,589
Braintree Village Shopping Centre	0	100	179	264
Great Notley	0	91	163	244
Witham	0	404	697	999
Halstead	0	179	316	459
Other Braintree District	0	853	1,488	2,161
Total	**0**	**2,632**	**4,613**	**6,716**

Source: Table 11 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Leisure Figure 2
Figures may not sum due to rounding

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