

c p w planning



Retail and Town Centre Study Update 2020

prepared for

Colchester Borough Council

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Appendices:

Appendix A	(Updated Healthcheck Audits)
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1. Introduction

- 1.1 CPW Planning has been commissioned by Colchester Borough Council to prepare a Retail and Town Centre Study Update ('Update') for the Borough. It updates and supersedes the Retail and Town Centre Study 2016 prepared by Cushman & Wakefield ('2016 Study').
- 1.2 The Update provides the evidence base to assist the Council with its work on the retail and town centre policies of the emerging Local Plan, and to support the Council's development management function. Because the Local Plan was submitted to the Secretary of State for independent examination before 24 January 2019, it is being examined against the National Planning Policy Framework (NPPF) of March 2012¹. The updated evidence base set out in this report therefore reflects the requirements of and is compliant with the NPPF 2012.
- 1.3 The Update has been prepared in the context of the latest available information and recent events, including the Covid-19 pandemic and changes to the Use Classes Order². A further notable change since the 2016 Study has been the grant of planning permissions for new retail and leisure floorspace in the Borough, in particular the major development proposals at Tollgate (Stanway) and North Colchester.
- 1.4 The main objectives of this Update, as identified in the brief issued by the Council, can be summarised as follows:
 - a) review national trends in the retail sector (particularly in response to Covid-19);
 - b) updated healthcheck audits of the Borough's centres;
 - c) updated retail capacity forecasts in the light of committed developments and the latest population and expenditure projections;
 - d) updated commercial leisure audit;
 - e) assess the potential to meet identified needs (as required by the NPPF 2012); and
 - f) identify any policy revisions in response to the updated evidence base.
- 1.5 It is relevant to note that the Council has recently submitted its bid for Town Deal grant funding from the Government. If successful, up to £25m would be awarded to support a variety of projects – including public realm improvements in Colchester Town Centre. It would follow the September 2020 accelerated Towns Fund investment (£1m) focused on improvements at St Nicholas Square and Balcerne Gate.

Report Structure

- 1.6 This Update is structured as follows:
 - Section 2 – National Retail Context and Trends
 - Section 3 – Centre Hierarchy and Healthcheck Assessments
 - Section 4 – Retail Capacity Update: Approach and Baseline Evidence
 - Section 5 – Retail Capacity Update: Forecasts
 - Section 6 – Commercial Leisure Audit
 - Section 7 – Opportunities for Growth and Change
 - Section 8 – Policy Recommendations
 - Section 9 – Conclusions

¹ Notwithstanding that a revised version was published in July 2018 and updated in February 2019.

² The claim for Judicial Review of the Government's changes to the Use Classes Order (inter alia) was dismissed by the High Court on 17 November 2020.

2. National Retail Context and Trends

Introduction

- 2.1 It is important when assessing future retail and town centre development needs in Colchester Borough to consider the current retail market in the UK. This is particularly pertinent amid the Covid-19 public health emergency, which is having a deep and potentially long-lasting impact on the retail, leisure and hospitality industries.
- 2.2 The structure of the retail sector has been changing at pace over the past decade, with the rise of online shopping and the scale of retailer closures having significant implications for town centres in particular. The Government-enforced closure of all but 'essential' shops and stores during the national lockdown(s) of 2020 has further resulted in new shopping habits, forcing the sector to respond to digital demands and re-evaluate its space requirements.
- 2.3 The rate of shop closures in the UK increased over 70% during H1 2020 (a net decline of 6,001 shops) compared to H1 2019³ and some analysts are predicting that one-in-four 'non-essential' shops may permanently close⁴. Leisure and hospitality businesses are also facing significant impacts and closures.
- 2.4 Against this background, we outline below the national trends in the retail sector and the potential implications for the Borough's centres.

Key Trends

Consumer confidence and spending

- 2.5 Per capita expenditure on comparison (non-food) goods has achieved average annual growth of 3.6% since the 2009 economic recession, with per capita spending in 2019 growing by 4.6% due to strong performance in spending on clothing and footwear, audio-visual equipment, and personal and recreational items. In contrast, per capita expenditure on convenience goods contracted between 2006 and 2015; grew by 3.9% in 2016 and 2.1% in 2017; and has since moderated with the latest data indicating that spending slowed to 1.1% in 2018 and declined by 0.7% in 2019⁵.
- 2.6 The Covid-19 outbreak at the beginning of 2020 has deepened the economic uncertainty facing the UK. According to Precisely's Retail Expenditure Guide 2020/21, which includes Oxford Economics' forecasts from the consumer spending model⁶, the Covid-19 pandemic and the resulting recession will end the UK's recent run of spending growth. It states:

Large-scale fiscal support, such as the government's job retention scheme, should help mitigate impact on household incomes, but the temporary closure of non-essential retail and the introduction of social distancing measures mean that consumer spending will fall substantially in 2020... We forecast per-capita expenditure on all goods to decline by 11% in 2020 – a considerably larger contraction than was experienced during the global financial crisis of 2008-2009. This is largely the result of a sharp decline in expenditure on comparison goods...

³ Property Week, 19 October 2020 (Shop closures surge over 70%).

⁴ Essential Retail, 23 June 2020 (Why retailers must use tech to dramatically cut costs).

⁵ Retail Expenditure Guide 2020/21: 2019-Based Expenditure Release, Precisely.

⁶ The forecasts *take into account the impact of the recession and the subsequent period of austerity, as well as the UK's vote to leave the European Union, which will contribute to a period of more restrained spending growth* (Retail Expenditure Guide 2020/21).

- 2.7 It adds that, with per capita expenditure on comparison goods expected to fall by 16.4% in 2020, the outlook for comparison goods spending has been downgraded over the medium term to 2024:

We forecast per-capita expenditure on comparison goods to grow by 1.8% per year, down from the strong growth seen in the last decade. This forecast is heavily influenced by the sharp fall in 2020, and 2021-2022 should see stronger results [although the reintroduction of lockdown measures in late 2020 or early 2021 could potentially push the recovery further back].

- 2.8 The outlook for convenience goods is more stable, with the Retail Expenditure Guide commenting that:

We forecast per-capita expenditures to fall by just 0.5% - broadly similar to the 2019 decline. Retail outlets for many convenience goods remain open during the lockdown, therefore spending opportunities are less disrupted than for comparison goods. In fact, we expect spending on food in particular to receive a boost in 2020, as consumers have been forced to substitute meals out with eating at home... However, as people begin eating out again [subject to pandemic-induced restrictions], we expect most of the boost to in-store food and drink spending to fade away, and subsequently forecast per-capita spending on convenience goods to fall by 2.3% in 2021.

- 2.9 It anticipates that convenience goods spending will decline by an average of 0.2% per year between 2019 and 2024, before growing by 0.5% per year in the longer term to 2040.

- 2.10 Although it is reported that total retail sales have risen for five consecutive months as of September 2020, with sales 5.5% higher than the pre-pandemic levels achieved in February 2020⁷, slower expenditure growth (particularly on comparison goods) due to the change in macro-economic conditions is likely to have implications for retailers and the expenditure-based capacity for new retail floorspace in Colchester Borough.

The continued growth of online shopping

- 2.11 The rapid growth in online shopping since the late 1990s has increased the market share of non-store retail sales with visible consequences for high streets and other shopping destinations. Yet the degree of impact is uncertain in the context of multi-channel retailing: stores are often a source of stock for online retail sales, while the internet can even direct customers to stores (e.g. use internet to research but make purchase in store).

- 2.12 In 2019, online shopping accounted for around 20% of total retail sales with significant variations by sector. Only around 5% of food sales were internet-based, whereas almost 20% of clothing and footwear sales (a key sector for many larger town centres) were attributable to online shopping. Some 60% of sales on DVDs, music and books were made online.

- 2.13 The Covid-19 outbreak and the national lockdown(s) that followed, resulting in the temporary closure of many shops, accelerated the significant growth in online shopping. According to figures published by ONS, online retail sales as a proportion of total retail sales hit a record high of more than 30% in May 2020, before falling back to 26.6% in August 2020. The latest figures for food sales show that online spending reached 13.5% as a proportion of total food sales in the four weeks to 9 August 2020, which is a new record⁸.

- 2.14 Whilst online shopping has benefitted from this lockdown-induced shift, many conventional non-food shops and stores are still struggling to attract consumers – but the recovery is mixed.

⁷ BBC News, 23 October 2020 (Shoppers defy economic gloom in September).

⁸ Essential Retail, 18 August 2020 (Online grocery sales reach record levels although overall spend slows).

Retailers reported a 9.9% jump in sales of DIY/homeware products in August 2020 compared with pre-pandemic levels, whereas the volume of clothing items sold was down 15.9% over the same period⁹.

- 2.15 To that end, Primark sales slumped 75% in the period March-June 2020 with the retailer having no online business to fall back on during the Covid-19 lockdown(s)¹⁰. Since reopening its stores, however, Primark's parent company has announced it expects sales to year-end to reach £2 billion, with sales at regional high street stores broadly in line with 2019 (whereas its retail park stores are achieving higher year-on-year sales)¹¹.
- 2.16 A significant recent change in the grocery sector has been Ocado's partnership switch from Waitrose to M&S, a joint venture which will see the online retailer selling 6,000 M&S-branded food items. Meanwhile, Waitrose has partnered with Deliveroo as part of a 12-week trial to offer an online service platform for rapid food deliveries in under 30 minutes¹².

Improved digital capability

- 2.17 Consumers are demanding (only 32% of UK consumers are willing to wait 2-3 days for deliveries¹³) and increasingly dependent on technology to fulfil one's shopping needs. Covid-19 has changed or reinforced pre-lockdown behaviours, with more consumers willing to try – and switch to – digital forms of shopping.
- 2.18 Modern retailers are therefore investing more and more in digital platforms. Burberry, the luxury fashion brand, has invested significantly to encourage a shift from offline (i.e. physical stores) to online behaviour, utilising virtual appointments and a direct messaging platform between sales associates and the consumer. Digital is now Burberry's fastest-growing channel (up 22% on 2019) and has served to retain consumer's affection for the brand and the propensity to purchase, notwithstanding the lockdown-enforced store closures¹⁴. Meanwhile, it is reported that international online sales of luxury goods increased by 170% year-on-year in August and September 2020, as Covid-19 and other changing consumer demographics have prompted the premium brands to prioritise their digital capability¹⁵.
- 2.19 Other retailers are closing their bricks-and-mortar stores and transforming into online-only brands. Examples include Maplin, Cath Kidston, and TM Lewin; and the trend is not limited to retail, with Thomas Cook (travel agent) also relaunching as an online-only business.
- 2.20 M&S, which integrated its online food business with Ocado in September 2020, has developed its digital capabilities in response to the changing consumer landscape as part of its 'Never the Same Again' programme. The retailer has digitised its Sparks loyalty scheme, in which members can receive rewards for frequently shopping at M&S, such as fast-track access to the latest products and trends¹⁶. It is also rolling out 'Mobile Pay Go' payment options¹⁷ whereby consumers scan a product's barcode as they shop and then pay from a mobile device via the retailer's App¹⁸.
- 2.21 While many larger retailers are investing in digital channels, this is not necessarily the case with smaller independents and high street businesses (although Covid-19 related impacts have forced some businesses to establish or develop online interest in order to generate sales). For

⁹ BBC News, 18 September 2020 (UK DIY sales soar but clothing stores fall behind).

¹⁰ Essential Retail, 6 July 2020 (Covid-19: Primark reveals 75% drop in sales due to lockdown).

¹¹ Retail Gazette, 7 September 2020 (Primark sales beat expectations since exiting lockdown).

¹² Essential Retail, 1 September 2020 (M&S and Ocado joint venture goes live).

¹³ Oxford Economics, 2019.

¹⁴ Essential Retail, 1 July 2020 (Covid-19: How the pandemic has transformed Burberry's digital business).

¹⁵ Essential Retail, 5 October 2020 (Cross-border online luxury sales on the rise).

¹⁶ Essential Retail, 2 July 2020 (Covid-19: M&S digitises loyalty scheme as part of transformation plan).

¹⁷ So too are other grocery retailers such as Co-op, Sainsbury's and Spar.

¹⁸ Essential Retail, 17 June 2020 (The post-Covid customer experience: the reawakening of digital).

most retailers, however, successfully combining physical and digital propositions will be necessary in the face of an increasingly competitive marketplace.

- 2.22 Moreover, technologies that make shopping trips fast, efficient and contactless (like self-checkout) were already on a growing trajectory pre-lockdown and are likely to become even more important as retailers tackle the issue of consumer confidence and anxiety about returning to stores¹⁹. The M&S ‘Mobile Pay Go’ initiative (cited above) will serve this trend, while Amazon plans to open at least 30 ‘physical’ convenience stores across the UK as part of its ‘Amazon Go’ rollout²⁰ which, significantly, involve no queueing and no checkout.

Right-sizing store portfolios

- 2.23 Prior to Covid-19, the shift towards online shopping resulted in a period of significant change and quite considerable consolidation from long-standing UK retailers. Large retailers increasingly focused on a smaller number of prime locations for their store portfolios (often referred to as *polarisation*) where they can have flagship-type stores and serve wide catchments. Others relaunched as online-only retailers, as commented before.
- 2.24 Much of this change can be attributed to a large number of loss-making stores, particularly in the context of reducing footfall and a highly competitive pricing environment. Company voluntary arrangements (CVAs) have been a preferred restructuring method for many retailers such as Mothercare, Homebase, New Look, Debenhams, Monsoon and Accessorize.
- 2.25 However, according to Deloitte, 2019 saw a 24% year-on-year decrease in CVAs *which in turn resulted in an increase in the number of administrations. This is in part due to push back from the landlord community which has made CVAs harder and less attractive to implement*²¹.
- 2.26 With consumer behaviour changing in response to the Covid-19 pandemic – many consumers have adapted to new ways of shopping that are convenient and safe – retailers are continuing to ‘right-size’ or even abandon their store portfolios (e.g. TM Lewin). It is reported that French Connection, Clarks and GAP are some of the latest retailers to consider closing some (French Connection²² and Clarks²³) or all (GAP²⁴) of their UK stores.
- 2.27 Like many retailers Poundland temporarily closed some (15%) of its stores during the national lockdown(s), which has significantly impacted year-on-year revenues despite revenue now returning to pre-lockdown levels²⁵. The retailer has consolidated its offer in Colchester Town Centre into a single store on Culver Street East, adjacent to Lion Walk²⁶.
- 2.28 Not all retailers are downsizing, however. Other discounters such as B&M, Home Bargains, Wilko and Poundstretcher have out-performed many high street chains during the Covid-19 crisis, with B&M increasing its UK sales by almost 20% in the period July-September 2020 despite the absence of an online sales platform. The retailer is benefitting from the shift in spending to out-of-town retail parks and plans to open 45 new stores by March 2021²⁷.
- 2.29 In the grocery sector, Lidl and particularly Aldi²⁸ continue to expand throughout the UK while Co-op recently announced plans to open 50 new convenience stores in response to increased

¹⁹ Essential Retail, 15 June 2020 (Covid-19: Stores reopen today – industry reacts).

²⁰ The Independent, 3 August 2020 (Amazon ‘plans to open at least 30 physical shops in the UK’).

²¹ Deloitte, 8 January 2020 (Retail sector ends decade with fall in the number of CVAs).

²² Property Week, 13 October 2020 (French Connection warns of store closures).

²³ Property Week, 7 October 2020 (Clarks to axe stores as it nears CVA).

²⁴ BBC News, 23 October 2020 (GAP considers closing all its UK stores).

²⁵ The Grocer, 9 July 2020 (Poundland revenues flat as rivals open in former Poundworld sites).

²⁶ Poundland previously occupied stores on Long Wyre Street and at St John’s Walk Shopping Centre.

²⁷ The Guardian, 29 September 2020 (B&M steps up expansion after lockdown sales boom).

²⁸ Property Week, 28 September 2020 (Aldi to open 100 more stores as part of £1.3bn UK investment drive).

demand and online ordering in the light of Covid-19²⁹. However, Waitrose is closing four supermarkets³⁰.

- 2.30 Covid-19 has also had a major impact on the ‘grab-and-go’ food market, which relies heavily on office workers and commuters. The shift in work patterns and the reduction in footfall has made some outlets unviable, with Pret announcing that it will close 30 branches across the UK³¹ while Costa Coffee is cutting more than 10% of its café workforce.
- 2.31 Service-based retail uses (i.e. financial services, travel agents) have seen a gradual contraction in store numbers in recent years, due to the continued growth of internet alternatives which provide convenient access to online banking³² and holiday price-comparison websites. This form of structural change has consequences for footfall and consumer spending, most notably in secondary town centres which are more dependent on such uses.

Changing store formats

- 2.32 It remains to be seen whether the social-distancing measures introduced in response to Covid-19 (which have been more problematic for smaller shops and stores) are likely to influence retailers’ store format requirements in the short to medium term.
- 2.33 Notwithstanding, modern consumers have high expectations for convenience, experience and personalisation; largely driven by smart phone technology (i.e. Apps) and social media (i.e. Facebook, Instagram, TikTok). Shopping is becoming more leisure focused and activity-based, which is reflected in new, often extensive store formats.
- 2.34 The large Next / Next Home ‘flagship’ stores are a well-known example of a major retailer developing out-of-town showrooms to provide a substantially expanded range of comparison goods and lifestyle experiences.
- 2.35 Some retailers, on the other hand, require (or are experimenting with) smaller and more efficient store formats. Homebase has launched a new split-level, small format showroom dedicated to kitchens (at ground floor level) and bathroom displays (first floor). The concept represents the second trial Homebase has undertaken since the Covid-19 outbreak, coinciding with more home-working and greater levels of spending on home improvements, and follows the launch of two ‘DECORATE by Homebase’ stores in May 2020³³.
- 2.36 The grocery sector has been reacting to changing shopping habits in recent years with implications for store formats. The underlying trend prior to Covid-19 was the decline of ‘bulk’ food shopping as consumers shopped around for best value and/or undertook more frequent top-up (or ‘basket’) food shopping trips. This trend coincided with the discounters (i.e. Aldi and Lidl) expanding their market share over the ‘big four’ supermarkets and is likely to continue, although there are indications that consumers are visiting convenience stores less often but spending more per visit.

Shared space

- 2.37 The adaptability of retail space is increasingly important in a fast-moving sector. There is greater collaboration between retailers in terms of sharing space; and between shopping centre landlords and their tenants in the provision of collection points and/or lockers.

²⁹ The Guardian, 4 September 2020 (Co-op creates 1,000 jobs and opens 50 new stores in UK).

³⁰ Property Week, 17 September 2020 (Waitrose to close four supermarkets).

³¹ The Guardian, 27 August 2020 (Pret a Manger cuts almost 2,900 UK jobs as sales plummet).

³² Metro Bank slashed its expansion plans in February 2020 due (in part) to competition in the online banking market.

³³ Essential Retail, 25 September 2020 (Homebase launches new dual purpose concept store).

- 2.38 Innovative collection arrangements are also being introduced at public transport hubs and other public places (i.e. not on the traditional high street), in response to the convenience-based demands of consumers.
- 2.39 One of the most successful retailer tie-ups has been Sainsbury's and Argos³⁴, while Laura Ashley will be returning to the UK high street in a new partnership with Next³⁵.
- 2.40 The sharing of space is likely to increase as retailers look to reposition themselves and offset rising occupancy/operational costs and thus falling profitability, which is a significant challenge for many retailers during the Covid-19 pandemic. Department stores comprising large floorplates, often over multiple levels, are particularly well-suited to accommodating other uses such as offices³⁶ and cafes/restaurants (e.g. Caffe Nero and Carluccio's occupy space within the Fenwick department store in Colchester Town Centre).
- 2.41 Trinity Works (Trinity Street) in Colchester Town Centre is an excellent example of a creative shared space. Managed by HAT Projects, the repurposed 1970s church includes a café offering wi-fi and 'touch down' space. It also comprises a maker-space facility with shared access to workspace and tools for ceramics, textiles and printmaking.
- 2.42 The recently introduced changes to the Use Classes Order – with the new Class E encompassing retail, commercial, business and service uses – provide greater flexibility and will make it easier to co-locate two or more asset classes within the same premises.

The click-and-collect market

- 2.43 Retailers are increasingly incorporating click-and-collect services into their stores or within adjacent customer car parks (such as the facilities provided by Currys & PC World at Tollgate, Asda at Turner Rise, and the Tesco Express in West Mersea).
- 2.44 As well as often accounting for a substantial proportion of retailers' online sales, click-and-collect reduces 'last mile delivery' costs and can create additional sales volumes. Covid-19 has led to a rise in click-and-collect options as retailers have been forced to adapt to the growing demands and expectations of consumers.
- 2.45 M&S is trialling new click-and-collect technology in a small number of stores as part of its plan to integrate in-store and online services for customers. One concept currently being tested allows customers to collect items contactless in-store, with a text / WhatsApp / Facebook Messenger informing them of their allocated shelf; while the other involves vehicle number-plate recognition and drive-up collection from a pre-allocated 'pick up' location³⁷. Aldi is also piloting its first UK click-and-collect services³⁸.
- 2.46 The click-and-collect market is likely to continue its upward trend in the light of the ongoing Covid-19 restrictions.

Pop-up (or meanwhile) uses

- 2.47 The UK's high streets have seen an increase in the number of pop-up shops and other uses in recent years. As well as addressing vacant or under-utilised space and tapping into local entrepreneurialism, they help to deliver a creative and bespoke retail experience.

³⁴ It has been announced that all 240 'standalone' Argos stores will close by 2024, although Sainsbury's plan to open 150 Argos outlets in its supermarkets.

³⁵ The Guardian, 31 October 2020 (British firm's homeware will be available via Next's UK stores and website from spring 2021).

³⁶ The John Lewis Partnership has recently secured planning permission to convert almost half of its Oxford Street (London) department store into offices.

³⁷ Essential Retail, 24 August 2020 (M&S trials new click & collect technology).

³⁸ Essential Retail, 14 September 2020 (Aldi trials click & collect in UK for first time).

- 2.48 The ‘meanwhile’ concept enables retail businesses, usually independents but increasingly multiples (e.g. Costa Coffee at CRATE Loughton), to lease space on a short-term basis. Markets and seasonal events are particularly popular and, by their nature, bring the animation and vibrancy that traditional high streets often lack.
- 2.49 Colchester Town Centre has seen the installation of the Caribbean-themed ‘Summer Drinks Terrace’ at Lion Walk, offering an outdoor bar and live music at a time when Covid-19 is resulting in restrictions on indoor entertainment.

The role of leisure and all-round experiences

- 2.50 Retail space alone is not enough to attract consumers to a town centre, with the importance of strong leisure-based ‘anchors’ increasingly evident. This reflects changing consumer habits and the demand for alternative, non-retail attractions and, ultimately, high quality experiences. Leisure also plays a major role in extending dwell times (and thus consumer spending) and supporting the night-time economy.
- 2.51 There has been a notable shift from retail to commercial leisure uses (such as restaurants, cinemas and gymnasiums) within newer retail-led schemes and many town centres. Developers and landlords recognise the value of providing leisure in order to create an all-round experience for shoppers, as seen in Colchester Borough with (for example) the plans for Tollgate Village.
- 2.52 That said, even before the Covid-19 outbreak, the leisure sector was challenged by the structural changes affecting retail businesses, with high street footfall in decline as consumers shopped online or at the most prime locations. The challenges facing the sector are even more pronounced in the light of Covid-19.
- 2.53 Cinemas have been particularly affected by the social-distancing measures and declining audiences. Cineworld recently confirmed it will temporarily close its 127 Cineworld and Picturehouse cinemas in the UK, citing the pandemic-induced lack of new films to draw in audiences³⁹. There is currently no Cineworld (or Picturehouse) operating in Colchester, although the leisure development plans for Northern Gateway include a 12-screen Cineworld.
- 2.54 The restaurant sector, which for several years has been subject to high levels of competition and discounting, and over-supply in some locations, has seen many major chains downsize across the UK (e.g. Carluccio’s, Jamie Oliver, Prezzo). In this context, it is encouraging for Colchester Town Centre that Carluccio’s (within the Fenwick department store) and Prezzo (Culver Street East) have maintained their representation.
- 2.55 Other restaurant chains have been forced to downsize or make permanent closures in the light of the Covid-19 crisis: it is reported that UK food and beverage sales halved in July 2020 compared to the previous year, as almost two-thirds of restaurants remained closed and many consumers sought home deliveries⁴⁰. Although the subsequent ‘Eat Out to Help Out’ scheme helped the sector to recover, the 22:00 curfew imposed since the end of September 2020 is likely to result in further closures⁴¹.
- 2.56 Whilst retail businesses have been adapting to the ‘new normal’ of store-based shopping, such as managing queues and encouraging social distancing, the need for engaging with customers and creating experiences should not be overlooked despite the ongoing Covid-19 restrictions. Lush, for example, has introduced a new in-store shopping experience: it involves the customer

³⁹ Property Week, 5 October 2020 (Cineworld to close all UK and US cinemas).

⁴⁰ The Guardian, 13 August 2020 (Covid halves July sales in UK pub, bar and restaurant chains).

⁴¹ Property Week, 19 October 2020 (Shop closures surge over 70%).

washing their hands with samples of Lush soap and water as they enter the store, instead of the clinical hand sanitiser used by most retailers⁴².

- 2.57 Offering all-round experiences ‘beyond retail’ through leisure and cultural attractions, such as the outdoor bar and live music pop-up venue at Lion Walk (cited above), cannot be achieved online and are therefore fundamental to the future recovery of town centres.

Potential Implications for the Borough’s Centres

- 2.58 This section has provided an overview of the national retail context and discussed some of the key changes in the retail and leisure sub-sectors as a result of the Covid-19 pandemic.

- 2.59 The trends identified are likely to have a number of implications for the Borough’s centres. Whilst the situation is fast-changing and somewhat uncertain in terms of the retail market outlook, we outline below the potential implications:

- It is likely that the pandemic-induced restrictions on the retail, leisure and hospitality industries will continue to have a significant impact on town centre footfall and activity. We consider that Colchester Town Centre is particularly vulnerable given its exposure to ‘non-essential’ fashion-orientated retailers, and reliance on leisure and hospitality (including the evening economy), other cultural activities and office/retail workers to generate expenditure.
- Several factors including slower expenditure growth projections, the continued growth of online shopping, together with the scale of collapsed or ‘at risk’ retailers (and those downsizing or relaunching as online-only brands), highlight the reality that many town centres have too much retail space overall. We identify in section 3 of this Update the reduction in comparison goods retailers and increasing vacancy levels in Colchester Town Centre, which should be taken into account when planning for new retail – particularly comparison goods retail – floorspace in the Town Centre.
- The trend towards ‘right-sizing’ has led retailers (and increasingly leisure operators) to target the most defensible and therefore high-demand locations, where footfall and consumer spending is most resilient to economic changes. This is now affecting more and more larger centres, as investors become increasingly selective and polarise towards fewer, prime retail locations. The Borough’s centres have been reasonably stable in terms of retailer representation since the 2016 Study (based on our updated healthcheck audits at Appendix A), although the considerable reduction in comparison goods retailers in Colchester Town Centre would suggest it is increasingly exposed and at risk to such trends.
- A key challenge for Colchester Town Centre will be retaining and improving the mix of retailers and other services. To achieve this, the Town Centre will need to (inter alia):
 - create the right conditions for investment in areas currently lacking in environmental quality (e.g. Priory Walk, St John’s Walk Shopping Centre) to complement the improvements delivered – and planned – in other areas of the Town Centre (as identified in section 3 of this Update);
 - improve accessibility, public transport connections, and car parking;
 - provide opportunities for flexible store formats with click-and-collect facilities and servicing arrangements that meet the needs of modern retail businesses; and

⁴² Essential Retail, 3 July 2020 (Covid-19: Retailers shouldn’t forget about experiential shopping).

- support a mix of retail and non-retail (including evening economy) attractions that are distinguished from those available at competing shopping destinations, and which help to increase dwell times and spend.
- Diversifying beyond traditional retail offers will be necessary in the context of reduced retailer demand. This underlines the important role of shared mixed-use spaces and meanwhile uses, which provide interest and high-quality experiences that cannot be achieved online: town centre strategies should therefore be flexible in supporting the evolution of the high street.
- Like successful retail businesses, the Borough's centres should look to integrate their physical and digital propositions in response to 'tech-savvy' consumer expectations and an increasingly competitive marketplace.

3. Centre Hierarchy and Healthcheck Assessments

- 3.1 This section provides an assessment of the Borough's centres as defined in Table SG5a of the emerging Local Plan, namely:
- Town Centre: Colchester.
 - District Centres: Tiptree; West Mersea; Wivenhoe; Tollgate; Peartree Road; Turner Rise; and Highwoods.
- 3.2 We have carried out up-to-date 'healthcheck' audits of each centre (based on the performance indicators set out under paragraph 006 of the Planning Practice Guidance⁴³) informed by our own site inspections during September 2020 and various sources of data including the Retail and Town Centre Study 2016 (prepared by Cushman & Wakefield), Experian Goad data, and information supplied by Colchester Borough Council and its partners.
- 3.3 The audits are included at Appendix A and provide the basis for re-assessing the role and function of each centre. An overview is included in this section. Beyond the existing centres, there is retail and (to a lesser extent) leisure floorspace within 'non-central' retail parks and warehouses and we identify the most significant facilities below.
- 3.4 In addition, a key change since the 2016 Study has been the grant of planning permissions for new retail and leisure floorspace in the Borough, including major developments at Tollgate (Stanway) and North Colchester. This section also therefore identifies any relevant committed developments.

Colchester Town Centre

- 3.5 Colchester Town Centre is the principal comparison goods shopping destination in the Borough supported by a mix of non-retail uses and services including leisure, cultural and community facilities. The number of units accommodating comparison goods retailers has fallen considerably since the 2016 Study (from 241 to 190), which represents a trend occurring in many centres across the UK but one that is increasingly affecting larger centres such as Colchester.
- 3.6 Most of the 'major' comparison goods retailers are concentrated in and around the Town Centre's main shopping centres – Culver Square and Lion Walk – and such representation is broadly unchanged since the 2016 Study, although Primark (Lion Walk) opened in 2017 while the Fenwick department store (High Street) has benefitted from a major refurbishment. We consider, for a centre of its size, higher end retailers are under-represented; however, the strong mix of independent shops and stores help to provide a more distinguished retail offer.
- 3.7 A further notable change since the 2016 Study is the opening of the Curzon cinema scheme (Queen Street). Alongside the new restaurants including at Greytown House⁴⁴ (High Street) and the refurbishment works to Mercury Theatre (Balkerne Gate), this has enhanced the Town Centre's all-round leisure offer. The completion of the High Street public realm works since the 2016 Study has also improved the 'experience' for town centre users.
- 3.8 Vacancy levels in Colchester Town Centre have increased from 10.5% of total ground floor premises (as reported in the 2016 Study) to 14.5% (based on the Experian Goad survey of November 2019). This is above the national average (around 12%) and includes some prominent vacant premises at the east of the Town Centre, at Priory Walk and adjacent

⁴³ Specifically the *Town centres and retail* section.

⁴⁴ Five Guys, Wagamama and Turtle Bay.

shopping streets (namely Long Wyre Street and Queen Street); Culver Street West; Lion Walk; High Street; and St John's Walk Shopping Centre.

- 3.9 Our audit has identified the significant impact of the Covid-19 crisis on town centre footfall⁴⁵ and car park stays. Whilst the impact is not limited to Colchester Town Centre, we assess that the Town Centre is particularly 'at risk' to such issues (more so than any other centre in the Borough) as commented in section 2 above. Even before the Covid-19 outbreak, there is evidence to suggest that both town centre footfall and car park stays have declined since the 2016 Study.
- 3.10 Overall, we assess that Colchester Town Centre continues to perform reasonably well against many of the healthcheck indicators. Yet there are weaknesses and signs that the Town Centre is increasingly vulnerable to structural changes in the retail sector and growing competition from nearby shopping destinations. The current outlook and the committed developments at Tollgate (Stanway) in particular, reinforce the need for measures to maintain the Town Centre's attractiveness and role as the principal mixed-use shopping destination in Colchester Borough. This includes continued investment in the public realm and key opportunity sites (including Vineyard Gate, Priory Walk and St John's Walk Shopping Centre) to improve the visitor experience and create a more vibrant, differential offer.
- 3.11 To that end, the public realm improvements proposed for St Nicholas Square and Balcerne Gate using the £1m accelerated Towns Fund will help to create the conditions necessary for inward investment and are aligned with the Council's wider longer-term investment plans to improve connectivity between various sites and celebrate the town's culture and heritage (inter alia) under the Town Deal. Increasing the residential and student population of the Town Centre (including through the committed developments identified below) will also help to generate expenditure to support retail and non-retail businesses.

Committed developments: Colchester Town Centre

Former Co-op Department Store, Long Wyre Street:

- Full planning permission (ref. 170424) was granted in December 2017 for change of use of the existing building with associated physical works to allow two A1 retail units (323 sqm) and five A3 restaurant units (2,098 sqm), along with 24 residential apartments.
- Construction work on this St Nicholas Quarter residential-led scheme has commenced, although it is understood that the restaurant units are unlikely to come forward.

Alumno Site, Queen Street:

- Full planning permission (ref. 182120) was granted on appeal in December 2019 for the redevelopment of the site to provide purpose-built student accommodation; hotel; flexible commercial (A1/A3/A4/B1(c)/D2) floorspace not exceeding 1,200 sqm; artist studios; and associated access and public realm improvements.
- Construction work has not yet started on site.

Tiptree

- 3.12 Tiptree lies outside the Colchester Urban Area, approximately 16km to the southwest of Colchester Town Centre.
- 3.13 The District Centre continues to perform an important role in terms of serving the convenience-based shopping and service needs of surrounding communities. It is supported

⁴⁵ Specifically at Culver Square and Lion Walk.

by three national supermarket chains – Asda, Iceland and Tesco – and includes a range of independent retail service businesses, together with a medical centre, community centre and library. There is a limited evening economy.

- 3.14 A key change since the 2016 Study is the closure of Boots (chemist). This remains one of only two vacant premises within the centre, which is a strong indicator of its overall vitality and viability.
- 3.15 Overall, we assess that Tiptree's role and function is unchanged since the 2016 Study.

West Mersea

- 3.16 West Mersea lies outside the Colchester Urban Area, approximately 16km to the south of Colchester Town Centre.
- 3.17 The District Centre provides a modest range of retail, service and community facilities that cater for the day-to-day needs of local residents as well as the centre's visitor function. The retail offer is dispersed throughout the centre and is largely focused on convenience retail (the main convenience stores are Tesco Express, Co-op and Spar). There is a library, post office and sports/leisure centre, while the small number of independent cafes/restaurants provide a limited evening economy.
- 3.18 Consistent with the 2016 Study, we consider West Mersea is performing well within the limitations of its small scale and particular role in the centre hierarchy.

Wivenhoe

- 3.19 Wivenhoe lies outside the Colchester Urban Area, approximately 6km to the southeast of Colchester Town Centre.
- 3.20 It is a small, linear, and somewhat fragmented centre serving the basic retail and service needs of local residents. There are two convenience stores (Co-op and One Stop), a Boots (chemist), and a small number of independent shops selling 'boutique' clothing and other personal goods. There are no vacant premises.
- 3.21 Overall, Wivenhoe District Centre displays relatively strong performance (considering its limited scale and function) and serves an important localised role. This is consistent with the findings of the 2016 Study.

Tollgate

- 3.22 Tollgate lies within the Colchester Urban Area, approximately 5km to the west of Colchester Town Centre in Stanway.
- 3.23 Tollgate is the Borough's largest District Centre and has evolved from a predominantly 'bulky' retail park into an established, sub-regional shopping destination with extensive surface level car parking. It includes a Sainsbury's superstore and a substantial range of multiple comparison goods retailers. Notwithstanding the limited changes to retailer representation since the 2016 Study, we assess it remains the case that Tollgate has a strong influence over shopping patterns across the catchment area (which extends well beyond Colchester Borough) and directly competes with Colchester Town Centre for comparison goods expenditure.
- 3.24 The centre is lacking in terms of services and community facilities. It contains several food and drink outlets. Additional such outlets (namely a public house, Starbucks coffee shop and two

restaurants – KFC and Nando’s) opened in 2018 as part of the Stane Leisure Park development⁴⁶, which sits to the west of the District Centre.

- 3.25 Considering this recent development and the planning permissions granted for major new retail and leisure floorspace (identified below), Tollgate is evidently a growing multi-purpose destination and competitor to Colchester Town Centre.

Committed developments: Tollgate

Tollgate Village:

- Outline planning permission (ref. 150239) was granted on appeal in August 2017 for mixed use development comprising retail and leisure uses (up to 30,812 sqm gross) with associated access, car parking, public realm improvements and associated works.
- The Council has since granted the reserved matters approval of appearance, landscaping, layout and scale (in addition to a Section 73 planning permission⁴⁷). The most recent reserved matters consent⁴⁸ allows for 19,195 sqm gross of A1 Comparison Retail; 1,858 sqm gross of A1 Convenience Retail; 2,100 sqm gross of A3/A4/A5 food and beverage uses; and 6,690 sqm of floorspace for D2 Leisure, including a multiplex cinema and a tenpin bowling facility.
- The Light will operate the proposed new cinema⁴⁹. We are not aware of any other named retail and leisure operators for the scheme.
- Construction work has not yet started on site.

Stane Retail Park:

- Full planning permission (ref. 193163) was granted in December 2019 for a new retail park to the immediate north of Stane Leisure Park, comprising 24,016 sqm of A1 retail floorspace and A3/A4/A5 food and beverage uses not exceeding 327 sqm.
- It is proposed that the scheme will accommodate two new foodstores (Aldi and M&S Food Hall), B&Q and a terrace of other ‘bulky goods’ stores. We are not aware of any named retailers for these other stores.
- Construction work started on site in September 2020.
- The Council has recently received a Section 73 application (ref. 202105) to vary the conditions of the extant planning permission. The application seeks to remove the ‘bulky goods’ restriction and make changes to the mezzanine floorspace. It is yet to be determined by the Council.

Peartree Road

- 3.26 Peartree Road lies within the Colchester Urban Area, approximately 3.5km to the southwest of Colchester Town Centre.
- 3.27 The District Centre comprises large format comparison goods stores and warehouses selling predominantly ‘bulky goods’ (exceptions include Poundstretcher and Barnardo’s). The centre also includes a Co-op convenience store, Domino’s Pizza, Greggs (bakery), and some active leisure uses (e.g. gymnasiums).

⁴⁶ Planning permission refs. 146486 and 150945 (granted on appeal). There are two vacant restaurants following the decision of Coast-to-Coast and Bella Italia to withdraw from the scheme prior to opening.

⁴⁷ Application ref. 193133 granted by the Council in April 2020.

⁴⁸ Application ref. 201503 granted by the Council in October 2020.

⁴⁹ Gazette News, 30 May 2020 (Boss of Tollgate Village cinema chain The Light says residents should be excited).

- 3.28 These characteristics are broadly consistent with the findings of the 2016 Study, which comments that the centre's role and function would be supported through the introduction of additional services and/or community facilities.

Turner Rise

- 3.29 Turner Rise lies within the Colchester Urban Area, less than two kilometres to the north of Colchester Town Centre.
- 3.30 The District Centre comprises a large Asda superstore and a purpose-built retail park with large format stores. There are several 'value' comparison goods retailers such as Poundland, Home Bargains and Dunelm. Consistent with the 2016 Study, there are no vacant units; no independent retailers; while services are limited to food and drink outlets (namely Pizza Hut, Costa Coffee and Subway) and the Asda in-store optician, pharmacy, and café.
- 3.31 Overall, we consider that Turner Rise is performing well as a large format, value-orientated shopping destination. The recent changes in retailer representation (i.e. Poundland and Carpets 4 Less replacing Bathstore and We Do Home) have not, in our view, changed the centre's role and function since the 2016 Study.

Highwoods

- 3.32 Highwoods lies within the Colchester Urban Area, approximately 2.5km to the northeast of Colchester Town Centre.
- 3.33 It is dominated by a Tesco Extra superstore with in-store concessions including a pharmacy, print shop, café, and the Florence & Fred clothing range. Other uses within the adjacent shopping centre are predominantly independent businesses (e.g. newsagents, dry cleaners, hairdressers).
- 3.34 Our audit confirms that, consistent with the findings of the 2016 Study, Highwoods District Centre functions as a main food shopping destination for surrounding communities. It also has a limited but important service-based role and function.

Non-central locations

- 3.35 There are additional facilities outside the centre hierarchy in the form of retail parks and 'solus' warehouses. The main retail parks are Colchester Retail Park (which includes Matalan, Choice Home Outlet, Shoe Zone, Poundland and Pure Gym) and Colne View Retail Park (comprising Aldi, DFS, Halfords and Pets At Home). Large format retail warehouses include B&Q Extra (Lightship Way), The Range (Cowdray Avenue) and Wickes (Clarendon Way Retail Park).
- 3.36 Colchester Borough also contains a number of 'non-central' foodstores, such as Waitrose (St Andrew's Avenue) and several Aldi⁵⁰ and Lidl⁵¹ discounters.
- 3.37 Section 6 of this Update identifies the current supply of key leisure facilities in the Borough by type and location, while a major new leisure-based scheme is proposed in North Colchester (identified below).

Committed developments: Non-central locations

Northern Gateway (North Colchester):

- In January 2018, the Council granted full planning permission (ref. 160825) for a new leisure-based scheme including a 12-screen cinema; 80-bed hotel; 4,548 sqm of A3/A5

⁵⁰ Colne View Retail Park; London Road, Lexden; and Magdalen Street.

⁵¹ Gosbecks Road; and Abbot's Road.

food and beverage uses; and 3,344 sqm of floorspace for other D2 Leisure comprising three active leisure units.

- The scheme has not come forward and Turnstone Colchester Ltd recently submitted a revised application for full planning permission (ref. 201631) comprising a 12-screen cinema; 90-bed hotel; active leisure units (totalling 5,200 sqm); and restaurant / hot food takeaway units (totalling 2,885 sqm). It is therefore similar to the 2018 approved scheme but intends to respond to current operator requirements. The revised application is yet to be determined by the Council.
- Cineworld will operate the proposed new cinema⁵². It is understood that other confirmed or target end-users include Travelodge (hotel), Puttstars (indoor golf), Jump Street (indoor climbing) and Hollywood Bowl (tenpin bowling).

Former Homebase, St Andrew's Avenue:

- Full planning permission (ref. 183130) was granted in June 2019 for the sub-division of the Homebase store into two units, including change of use to allow a new Lidl foodstore (not exceeding 1,972 sqm gross) to occupy one of the units.
- The scheme has not come forward and Lidl has submitted a revised application (ref. 201217) for a larger format foodstore and a new A3/A5 food and beverage use. The revised application is yet to be determined by the Council.

⁵² This was confirmed prior to the announcement that Cineworld will temporarily close all of its cinemas in the UK for reasons related to the Covid-19 pandemic.

4 Retail Capacity Update: Approach and Baseline Evidence

4.1 In this section, we outline our approach to retail capacity forecasting in this Update. We then set out the baseline assumptions and forecasts underpinning the updated assessment of new retail (comparison and convenience goods) floorspace capacity in Colchester Borough over the plan period.

Approach

4.2 Our assessment adopts the Excel-based model used for retail capacity forecasting in the 2016 Study, applying the most up-to-date baseline evidence available.

4.3 We must point out that the updated assessment relies on the household survey of shopping patterns undertaken approximately four years ago. To compensate for this, we have adjusted the market shares indicated by the 2016 household survey where necessary (as described later in this section).

4.4 We forecast the expenditure-based capacity for new retail floorspace as follows:

- define an appropriate catchment area for Colchester Borough, sub-divided into 9 zones based on postcode sectors;
- calculate the total amount of comparison and convenience goods expenditure available within each of the 9 zones comprising the catchment area, at the base and forecasting years;
- allocate the available expenditure to the Borough's shopping destinations based on the results of the 2016 household survey (adjusted by CPW Planning) to estimate current sales and forecast future sales in each shopping destination;
- identify any committed developments (i.e. retail floorspace with planning permission, under construction and/or opened since the 2016 household survey) and assess their likely turnover; and
- compare the estimated sales in the Borough's shopping destinations with existing floorspace, so as to assess the current trading performance of each shopping destination and the capacity to support additional comparison and/or convenience goods floorspace (after allowing for committed developments).

4.5 Our approach is consistent with the NPPF and established best practice.

Shopping destinations and scenarios assessed

4.6 The shopping destinations modelled are:

- Colchester Town Centre;
- the District Centres of Tollgate, Turner Rise, Peartree Road, Highwoods, and Tiptree; and
- Non-central stores in the Borough.

4.7 We assess the 'baseline' scenario for new retail floorspace in the Borough, in which we assume that the 2016 pattern of market shares of convenience and comparison goods expenditure in each of the Borough's shopping destinations – indicated by the 2016 household survey (adjusted by CPW Planning) – remains unchanged throughout the forecasting period. The implicit assumption in this scenario is that any new retail floorspace in these shopping

destinations would not change the market shares of expenditure attracted from the catchment area.

- 4.8 This ‘constant market share’ approach is widely used and accepted for strategic retail capacity forecasting. However, the Council will be aware that it is a highly theoretical approach on the basis it does not, for example, take into account the planned delivery of new retail floorspace in the Borough and its potential impact on shopping patterns and market shares over time. This is particularly the case in respect of the major development proposals at Tollgate (i.e. Tollgate Village and Stane Retail Park), which are likely to reduce Colchester Town Centre’s market share of comparison goods expenditure (and thus comparison goods floorspace capacity) and increase expenditure retention at Tollgate.

Format of the retail capacity tables

- 4.9 In the remainder of this section, all references to *Tables* are those comprising our updated assessment of new retail floorspace capacity set out at Appendix B:

- Tables 1 to 5 show the population and expenditure forecasts for the catchment area.
- Tables 6 to 13 are the tables for Colchester Town Centre. Tables 6 and 7 indicate the pattern of market shares of expenditure on each category of comparison and convenience goods respectively attracted from the catchment area, as indicated by the 2016 household survey before correction. Table 8 shows the corrected pattern of market shares. Table 9 is the product of Tables 5 and 7, indicating the amounts of expenditure on each comparison goods sub-category attracted. Table 10 sets out forecast retail sales for both comparison and convenience goods, on a zone-by-zone basis and overall. Table 11 accounts for the sales capacity of existing main foodstores and other convenience goods shops in the Town Centre, and Table 12 sets out any committed retail developments and their expected sales levels (for both comparison and convenience goods). Table 13 brings together the expenditure attracted, existing floorspace and commitments to arrive at the retail capacity forecasts for Colchester Town Centre. It also shows the overall market shares of total catchment area expenditure on comparison and convenience goods attracted by the Town Centre.
- Tables 14 to 22 are the tables for Tollgate. These tables follow the same arrangement as the tables for Colchester Town Centre; however, an additional table is included (Table 20) indicating ‘benchmark’ comparison goods sales in the existing retail warehouses and foodstores.
- Tables 23 to 31 are the tables for Turner Rise; Tables 32 to 40 are the tables for Peartree Road; and Table 41 to 49 are the tables for Highwoods. These tables follow the same arrangement as the tables for Tollgate.
- Tables 50 to 57 are the tables for Tiptree and follow the same arrangement as the tables for Colchester Town Centre.
- Tables 58 to 66 are the tables for Non-central stores in the Borough and follow the same arrangement as the tables for Tollgate.

Limitations of retail capacity forecasting

- 4.10 It is important to note that the updated retail capacity forecasts serve only as a guide for future planning policies and decisions on planning applications. They are not prescriptive and the further ahead the forecasting date, the less certain the forecasts. Of particular note, the Council should be aware that capacity forecasts beyond five years should be treated with caution, as they are based on various assumptions and forecasts that can and will change. Forecasting

accuracy, even over the next five years, is further uncertain due to the change in macro-economic conditions and the impact of Covid-19.

Baseline Evidence

- 4.11 The baseline evidence used for this updated assessment has been obtained from reliable sources and is as up-to-date as possible; while our interpretation and analysis of such evidence is based on our professional judgements and experience of retail capacity forecasting.

Catchment area

- 4.12 We have adopted the same catchment area (and zones) as the 2016 Study. The catchment area zones are based on postcode geography⁵³ and extend beyond Colchester Borough's administrative boundary to reflect shopping patterns and expenditure flows.
- 4.13 A map of the catchment area showing the 9 zones is included at Appendix C.

Base and forecasting years

- 4.14 We have used 2020 as the base year for our updated forecasts. The model therefore provides estimates of current sales in Colchester Town Centre, each of the District Centres, and Non-central stores in the Borough as at 2020. As agreed with the Council, we have prepared capacity forecasts at 2023, 2028 and 2033 (so as to cover the forthcoming plan period).

Catchment population

- 4.15 The starting point for the population forecasts is a report, dated October 2020, commissioned from Precisely (formerly Pitney Bowes) on the current and projected future population of each catchment area zone. The result is that, for the catchment area as a whole, the population is expected to increase from 508,121 in 2020 to 554,168 by 2033 (representing an increase of about 9%).

Price basis

- 4.16 All monetary values in this Update are in constant 2019 prices, unless otherwise stated.

Per capita expenditure

- 4.17 The report commissioned from Precisely sets out estimated average per capita expenditure on comparison and convenience goods in each catchment area zone for 2020, together with forecasts for 2023, 2028 and 2033. These estimates and forecasts take account of differences in average per capita expenditure on comparison and convenience goods from zone to zone. The resulting estimates and forecasts of per capita expenditure on both comparison and convenience goods, including expenditure on Special Forms of Trading, are set out in the top half of Table 2 at Appendix B.
- 4.18 The forecast growth in per capita expenditure in Table 2 is specific to the catchment area. The use of such local growth forecasts is expected to be more reliable than relying on national forecasts. Notwithstanding, they broadly reflect the UK-wide trend of slower expenditure growth (particularly on comparison goods) in the short to medium term.

Special Forms of Trading (SFT)

- 4.19 We have made deductions from the per capita expenditure figures supplied by Precisely to allow for expenditure via SFT. This includes online shopping, mail order and expenditure at

⁵³ Refer to Table 1 at Appendix B for details of the relevant postcode sectors.

temporary market stalls; and is therefore expenditure not made in shops and stores. Table 2 shows the growing deductions we have made.

- 4.20 We have applied an SFT deduction of 6.5% for convenience goods expenditure in 2020, increasing to 8% by 2033. Our SFT deductions for comparison goods expenditure are much greater; from 20% in 2020 to 25% by the end of the forecasting period.
- 4.21 These deductions are based on our professional judgements⁵⁴ at this moment in time. The outlook is fast-changing and subject to the potential future impact of Covid-19 on shopping habits (including online shopping), the influence of SFT may be far greater. This underlines the need to review the retail capacity forecasts on a regular basis.

Total available expenditure in the catchment area

- 4.22 The effect of slower expenditure growth in the catchment area combined with increasing expenditure via SFT (i.e. online shopping) is that there is substantially less expenditure available to support new retail floorspace relative to the levels forecasted in the 2016 Study. This is particularly the case for comparison goods floorspace.
- 4.23 To illustrate this, Table 3 at Appendix B shows that total catchment area comparison goods expenditure is forecast to reach £1,684m by 2023, rising to £2,082m by 2033. These latest forecasts are much lower than those set out in the 2016 Study for the same forecasting years: £2,031m and £2,799m respectively.

Shopping patterns in the catchment area

- 4.24 For the purposes of this Update, we have relied on the 2016 household survey of shopping patterns in the catchment area – the results of which are contained in the 2016 Study⁵⁵.
- 4.25 The household survey covered the area shown on the map in Appendix C, which was divided into the 9 zones shown on that map. It asked questions about households' shopping habits for main food and top-up food (i.e. convenience goods⁵⁶) shopping, along with questions about shopping habits for the following sub-categories of comparison goods:
- clothing and footwear;
 - furniture and floor coverings;
 - household textiles and soft furnishings;
 - household appliances;
 - audio-visual equipment;
 - hardware, DIY goods and decorating supplies;
 - chemist/medical goods and beauty products; and
 - personal and luxury goods (e.g. books, jewellery, watches, china, glassware).
- 4.26 Although the household survey was undertaken approximately four years ago, we have agreed with the Council that it remains a reliable basis on which to prepare updated retail capacity forecasts for the following principal reasons:

⁵⁴ Supported by information for the UK published by Oxford Economics (derived from Precisely's up-to-date Retail Expenditure Guide 2020/21) and Experian Retail Planner Briefing Note 17.

⁵⁵ Appendix A.

⁵⁶ Includes food, alcoholic drinks, tobacco products, newspapers and periodicals, and non-durable household goods.

- a) There has been limited new retail development in Colchester Borough since the 2016 household survey while the likely impact of such development on shopping patterns can be addressed through market share updates (as described below); and
- b) It is considered that the impact of the Covid-19 pandemic on town centre footfall and consumer shopping habits would potentially undermine the reliability of any new household survey undertaken at this time.

Market share updates

- 4.27 Our starting point for information on market shares (i.e. shopping patterns) in the catchment area is the results of the 2016 household survey. Since that survey, limited new retail development has come forward and there have been some notable occupier changes.
- 4.28 We have updated the survey-indicated market shares to take into account those new (post-2016) retail developments and key occupier changes that, based on our professional judgements, are likely to have altered the pattern of market shares of expenditure attracted by a particular shopping destination; thereby seeking to make the market shares represent reality more accurately.
- 4.29 We assess that no market share updates are necessary for Colchester Town Centre other than to incorporate the 2016 Study adjustments for the opening of Primark (Lion Walk). There have been no further significant changes in retailer representation.
- 4.30 Similarly, no market share updates have been made in respect of Tollgate. Changes in retailer representation since the 2016 Study include the opening of a new Hobbycraft; Staples / Office Outlet closing down; and Tapi Carpets replacing Carpets 4 Less. On balance, we consider these changes are unlikely to have materially altered the overall pattern of market shares of comparison goods expenditure attracted from the catchment area.
- 4.31 We assess that some market share updates are necessary for Turner Rise. To that end, we have updated the comparison goods market shares (Table 24) to reflect that Poundland and Carpets 4 Less are now trading from the stores previously occupied by We Do Home and Bathstore respectively at the time of the 2016 household survey. In particular, we have slightly increased the market shares of expenditure on furniture and floor covering (Q5), household textiles and soft furnishings (Q6) and hardware, DIY goods and decorating supplies (Q9) from some of the zones. Some of this increased expenditure may have been redistributed from the Homebase store on St Andrew's Avenue, which closed in 2018 (considered further below).
- 4.32 No market share updates are necessary for Peartree Road, Highwoods and Tiptree.
- 4.33 With regards to Non-central stores in the Borough, we have updated the comparison goods market shares (Table 59) to reflect the closure of Homebase at St Andrew's Avenue. Specifically, we have 'stripped out' the market shares of expenditure on furniture and floor covering (Q5), household textiles and soft furnishings (Q6) and hardware, DIY goods and decorating supplies (Q9) as indicated by the 2016 household survey.
- 4.34 We assess that no further market share updates are necessary. This includes the survey-indicated market shares of convenience goods expenditure following the opening of two new 'non-central' Lidl foodstores on Gosbecks Road and Abbot's Road respectively. For the purposes of this Update, we have assumed that this new provision has not materially altered the pattern of market shares attracted by Non-central stores in the Borough (i.e. there will be some redistribution of convenience goods expenditure most likely affecting the Aldi foodstores but the overall pattern of market shares as shown in Table 58 is broadly unchanged).

Market share corrections

- 4.35 The 2016 household survey provides a detailed picture of where households in each of the 9 catchment area zones do ‘most of’ their shopping for convenience goods and the different sub-categories of comparison goods. This is common practice for a survey of this nature, since it is not practical to ask respondents to quantify how much they spend on various goods, and where and how often. Thus the results of the household survey (with the market share updates described above) do not directly indicate actual expenditure flows, but are the best available data to use as a proxy for modelling retail expenditure flows from residential areas to shopping destinations. However, like all such surveys, this means that its results cannot be applied uncritically: they tend to over-emphasise comparison goods shopping in large centres and under-state such shopping trips to small centres⁵⁷.
- 4.36 It is therefore necessary to introduce market share correction factors so as to transfer expenditure in the model from one or more locations to others, to balance (or calibrate) the model and make it represent reality more accurately⁵⁸ based on our professional judgements. Such correction factors were used for the 2016 Study and are necessary for the purposes of this Update.
- 4.37 To that end, in respect of Colchester Town Centre, use of the comparison goods market shares from the 2016 household survey without correction would generate an unrealistically high sales density for the Town Centre; in view of its size and comparison goods retailers. We have therefore reduced the survey-indicated comparison goods market shares for every catchment zone by the market share correction factor of 80% indicated at the top of Table 8 (i.e. we have reduced them by 20% from the no-change default factor of 100%). In terms of convenience goods market shares in Colchester Town Centre, we consider it necessary to introduce a market share correction factor of 140% (i.e. we have increased them by 40%) because, in our view, the market shares derived from the 2016 household survey do not provide a realistic convenience goods sales density for the Town Centre.
- 4.38 Adjustments for the other shopping destinations modelled are indicated in the equivalent tables at Appendix B.
- 4.39 These corrections to the survey-indicated market shares are based on our professional judgements and, we consider, ensure the model is more realistic in terms of average sales densities and the current market shares attracted from the catchment area.

Visitor expenditure

- 4.40 We have made allowances for visitor expenditure in Colchester Town Centre and Tollgate District Centre⁵⁹ as they are likely to secure some of their comparison goods expenditure (in particular) from outside the catchment area. These allowances are the same as those assumed in the 2016 Study, which we consider remain realistic.

Existing shop floorspace

- 4.41 The existing shop floorspace in the Borough’s centres is derived from the most recent Experian Goad surveys in respect of Colchester Town Centre (November 2019) and Tiptree (June 2017);

⁵⁷ This is confirmed by the now revoked DCLG ‘Practice Guidance’ which states, ‘Also, surveys that use simple questions about where people shop, provide answers that relate to trips and not spending flows. They can also overstate the importance of the larger centres and stores, and can understate the smaller and less frequently visited stores.’ (Appendix B, paragraph B.34).

⁵⁸ There is an approximate correlation between the size of a centre and its average sales density, with larger centres generally having higher sales densities than smaller centres (and hence higher shop rental values).

⁵⁹ We have made no such allowance for the other District Centres and Non-central stores in the Borough given that they are unlikely to secure significant expenditure from outside the catchment area.

and from the 2016 Study (updated by CPW Planning as required) for each of the other centres. With regards to Non-central stores in the Borough, floorspace data has been sourced from the 2016 Study and our own desktop investigations.

Committed developments

- 4.42 We have included in the model the new retail floorspace expected to result from a number of committed developments in the Borough. These are identified in Figure 4.1 below.

Figure 4.1 – Committed new retail floorspace

Colchester Town Centre
<i>Convenience Goods:</i>
Alumno Site, Queen Street (application ref. 182120)
Former Co-op Department Store, Long Wyre Street (application ref. 170424)
Tollgate
<i>Convenience Goods:</i>
Tollgate Village (application ref. 150239)
Aldi, Stane Retail Park, Stanway (application ref. 193163) [1]
M&S Food Hall, Stane Retail Park, Stanway (application ref. 193163) [1]
<i>Comparison Goods:</i>
Tollgate Village (application ref. 150239)
B&Q, Stane Retail Park, Stanway (application ref. 193163) [1]
Other Bulky Goods Stores, Stane Retail Park, Stanway (application ref. 193163) [1]
Non-central stores in the Borough
<i>Convenience Goods:</i>
Lidl, Former Homebase, St Andrew's Avenue, Colchester (application ref. 183130)
Sainsbury's, assumed to replace B&Q Extra, Lightship Way (application ref. 143715) [2]
<i>Comparison Goods:</i>
Sainsbury's, assumed to replace B&Q Extra, Lightship Way (application ref. 143715) [2]

Notes:

[1] Although not technically part of Tollgate District Centre, Stane Retail Park will function as part of the same mixed-use shopping destination.

[2] We understand Sainsbury's may not progress. However, the planning permission has been implemented (see application ref. 192094) and represents a realistic fall-back in terms of the potential scale and nature of 'new' floorspace.

- 4.43 Our assumptions pertaining to the convenience and/or comparison goods net floorspace and sales capacity of these committed developments are set out in Tables 12 (for Colchester Town Centre), 21 (for Tollgate District Centre) and 65 (for Non-central stores in the Borough) at Appendix B.
- 4.44 There is vacant retail floorspace in some of the Borough's centres, a proportion of which we assess is likely, in certain locations, to be reoccupied for retail purposes. Our assumptions in this respect take into consideration the reduced retailer demand (particularly from comparison goods retailers) and the changes to the Use Classes Order, which provide more flexibility to change from retail to other commercial, business and service uses. Our assumptions also consider the location and quality of vacant retail floorspace.
- 4.45 Accordingly, we have included in the model at Appendix B a proportion of vacant retail floorspace as committed development; specifically for comparison goods floorspace in Colchester Town Centre (Table 12) and Tollgate District Centre (Table 21⁶⁰). Given the very

⁶⁰ The comparison goods floorspace identified forms part of the Tollgate Village scheme.

limited amount of vacant retail floorspace at the other shopping destinations modelled, no such floorspace is identified as commitment development.

Growth in sales densities

- 4.46 We have assumed that both existing and new comparison goods floorspace will increase its sales density by approximately 2% per annum throughout the forecasting period. This allocates a proportion of the forecast growth in expenditure to existing shops and stores, before new floorspace becomes necessary. Our judgements in this respect take into consideration Precisely's Retail Expenditure Guide 2020/21 and Experian Retail Planner Briefing Note 17.
- 4.47 We have made no allowance for increases in sales densities of convenience goods floorspace over the forecasting period.

5 Retail Capacity Update: Forecasts

- 5.1 In this section, we set out and describe the updated retail capacity forecasts for the Borough's shopping destinations over the forecasting period to 2033.
- 5.2 We indicate the capacity for new convenience and comparison goods floorspace in Colchester Town Centre; the District Centre's of Tollgate, Turner Rise, Peartree Road, Highwoods and Tiptree; and Non-central stores in the Borough.
- 5.3 Although we distinguish between the Borough's Town and District Centres and 'non-central' locations, this is for the purposes of forecasting reliability and does not mean that any capacity forecast for Non-central stores in the Borough should be accommodated in the form of out-of-centre retail development. The sequential approach should be applied, with a preference for town centres and then edge-of-centre locations, and only if suitable sites are not available should out-of-centre sites be considered.
- 5.4 We would highlight that our forecasts represent the 'baseline' scenario for new retail floorspace in the Borough, in which we assume that the 2016 pattern of market shares of convenience and comparison goods expenditure in each of the Borough's shopping destinations – indicated by the 2016 household survey (adjusted by CPW Planning) – remains unchanged throughout the forecasting period, notwithstanding the potential impact of committed developments on shopping patterns and market shares over time.

Convenience Goods Floorspace

- 5.5 Our updated 'baseline' capacity forecasts for new convenience goods floorspace in the Borough are summarised in Figure 5.1 below.
- 5.6 The forecasts are for future floorspace capacity after allowing for the committed developments, including 3,763 sqm net convenience goods floorspace at Tollgate (i.e. Tollgate Village and Stane Retail Park) and 4,872 sqm net convenience goods floorspace at Non-central stores in the Borough⁶¹. These are significant commitments and result in 'negative' expenditure-based capacity to support new convenience goods floorspace at these shopping destinations over the plan period, as shown in the table below.
- 5.7 We would further note that:
 - a) The forecasts are on the assumption that where retailers are shown in the model to be trading above or below estimated 'benchmark' company average levels, their sales densities will fall or rise to that company average level. In reality, however, some stores may continue to trade above or below benchmark levels.
 - b) The forecasts are on the assumption that potential new convenience goods floorspace would be delivered in the form of new foodstores trading at a 'generic' average sales density of £12,000 per sqm net. Some operators would trade above this level whilst other foodstores (and convenience goods shops) would trade below. Therefore, the format in which new convenience goods floorspace is provided will affect the amount of such floorspace that can be supported in terms of expenditure-based capacity.

⁶¹ Sainsbury's (assumed to replace B&Q Extra on Lightship Way) and Lidl (occupying the former Homebase store on St Andrew's Avenue).

Figure 5.1 – Summary of retail capacity forecasts: convenience goods (sqm net sales area)

	2023	2028	2033	Table number (Appendix B)
Colchester Town Centre	-150	100	350	13
Tollgate	-2,350	-1,950	-1,600	22
Turner Rise	-800	-500	-200	31
Peartree Road	-50	50	50	40
Highwoods	100	350	550	49
Tiptree	-300	-150	-50	57
Non-central stores in the Borough	-3,900	-3,400	-3,000	66
Combined forecasts for Colchester Borough	-7,450	-5,500	-3,900	n/a

Source:

Tables 1-66, Appendix B.

Notes:

a) The forecasts are 'baseline' forecasts after allowing for the committed developments.

b) The forecasts are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.

c) Forecasts rounded to the nearest 50 sqm net.

d) The grand totals (i.e. combined forecasts) may not exactly equal the sub-totals due to rounding.

5.8 Figure 5.1 shows that, whilst some of the Borough's centres will have limited capacity for new convenience goods floorspace towards the end of the plan period (Colchester Town Centre and Highwoods in particular), the overall picture is that there will be a substantial theoretical over-supply of such floorspace across the Borough. This is largely due to the significant commitments at Tollgate and Non-central stores in the Borough.

5.9 No increases in market shares have been assumed as a result of these committed developments. In practice, the potential new convenience goods floorspace coming forward will be supportable in expenditure terms through the redistribution and/or 'clawing-back' of expenditure from existing stores (some of which may be over-trading) in the catchment area.

Comparison Goods Floorspace

5.10 Our updated 'baseline' capacity forecasts for new comparison goods floorspace in the Borough are summarised in Figure 5.2 below.

5.11 Again, it is important to highlight that the forecasts are for future floorspace capacity after allowing for the major committed developments at Tollgate in particular. This includes up to 14,920 sqm net comparison goods floorspace associated with the Tollgate Village scheme and the 13,748 sqm net which forms part of Stane Retail Park⁶². The forecasts also take into account:

- the potential for a proportion of vacant retail floorspace in Colchester Town Centre to be reoccupied as comparison goods floorspace (2,049 sqm net);
- the potential re-occupation of the 1,296 sqm net vacant retail warehouse (formerly Staples / Office Outlet) at Tollgate; and
- the 3,142 sqm net comparison goods floorspace potentially coming forward at Non-central stores in the Borough through the re-use of the B&Q Extra on Lightship Way.

⁶² Namely the B&Q (excluding trade / non-retail sales and external space) and the 'Other Bulky Goods Stores'.

Figure 5.2 – Summary of retail capacity forecasts: comparison goods (sqm net sales area)

	2023	2028	2033	Table number (Appendix B)
Colchester Town Centre	2,100	2,850	2,950	13
Tollgate	-15,050	-14,650	-14,600	22
Turner Rise	50	200	200	31
Peartree Road	100	150	200	40
Highwoods	-50	0	0	49
Tiptree	500	500	550	57
Non-central stores in the Borough	1,400	1,650	1,700	66
Combined forecasts for Colchester Borough	-11,400	-9,850	-9,550	n/a

Source:

Tables 1-66, Appendix B.

Notes:

a) The forecasts are 'baseline' forecasts after allowing for the committed developments.

b) The forecasts are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.

c) Forecasts rounded to the nearest 50 sqm net.

d) The grand totals (i.e. combined forecasts) may not exactly equal the sub-totals due to rounding.

e) The forecasts for Non-central stores in the Borough assume any new comparison goods floorspace would trade at a typical average sales density for non-food retail warehouses. However, in the event that the forecast capacity or any part of it can be accommodated in town centre or edge-of-centre format developments, the capacity would be less than shown because town centre formats typically trade a higher sales densities than retail warehouses.

5.12 Figure 5.2 shows that, after allowing for commitments and for existing comparison goods floorspace to become more efficient by 2% per annum from 2020 onwards (an assumption applied to all shopping destinations modelled), there will be capacity to support new comparison goods floorspace in Colchester Town Centre; amounting to about 2,100 sqm net by 2023, rising to almost 3,000 sqm net towards the end of the plan period.

5.13 This forecast capacity is predicated on the market shares indicated by the 2016 household survey (as corrected) remaining unchanged throughout the forecasting period and does not, therefore, take into account the potential impact of the Tollgate Village and Stane Retail Park committed developments on the Town Centre's market shares of comparison goods expenditure.

5.14 Largely as a result of these commitments, the combined Borough-wide 'baseline' forecasts indicate that there will be a significant theoretical over-supply of comparison goods floorspace throughout the plan period.

Use and Review of the Forecasts

5.15 As mentioned previously, the updated retail capacity forecasts serve as a guide for future planning policies and decisions on planning applications. Whilst we have applied the most up-to-date baseline evidence available, the forecasts are based on a number of assumptions and are intended only as an indication of the likely order of magnitude of retail floorspace capacity (if forecast trends are realised) rather than as prescriptive maximums or minimums.

5.16 The forecasts should be reviewed regularly in the light of actual population and (in particular) expenditure growth, the outlook for which is subject to change given Covid-19 and the macro-economic conditions. It will also be important to review the forecasts as and when committed developments come forward and their effects become more measurable.

6 Commercial Leisure Audit

- 6.1 As our commentary and analysis in section 2 of this Update has set out, leisure uses and experiences are an integral part of successful town centres. Given the continued growth of online shopping it is increasingly important for town centres to diversify ‘beyond retail’ by offering a range of leisure, entertainment and cultural activities that can help to attract visitors, improve dwell times and, significantly, support their retail function.
- 6.2 Therefore, in accordance with the brief issued by the Council, we identify the current supply of key leisure facilities in the Borough by type and location. Our review is informed by Experian Goad’s latest survey data for Colchester Town Centre, the findings of the 2016 Study, and our own desktop research.
- 6.3 We further identify the commercial leisure developments currently proposed in Colchester Borough (specifically those with extant planning permission and any applications yet to be determined by the local planning authority).

Colchester Town Centre

- 6.4 Our healthcheck audit included at Appendix A finds that Leisure Services are the second most dominant use category in Colchester Town Centre behind Comparison Retail. Of the 152 units accommodating Leisure Services, 128 units comprise food and beverage (F&B) uses.
- 6.5 Against this background, Figure 6.1 below provides a breakdown of existing F&B provision in Colchester Town Centre.

Figure 6.1 – Food & Beverage Provision, Colchester Town Centre

Category	Floorspace (sqm gross)	Units (count)	% of Total Leisure Floorspace	% of Total Leisure Units	Average Unit Size (approx. sqm gross)
Bars & Wine Bars	3,614	15	18.1	11.7	240
Cafes	4,794	41	24.0	32.0	120
Fast Food & Take Away	2,954	28	14.8	21.9	110
Public Houses	3,530	13	17.7	10.2	270
Restaurants	5,045	31	25.3	24.2	160
TOTAL	19,937	128	100	100	

Source:

Figures derived from Experian Goad Category Report for Colchester Town Centre (November 2019).

- 6.6 Our main observations include:
- F&B uses account for almost 20,000sqm (gross) of floorspace, which is approximately 17% of the total amount of floorspace in Colchester Town Centre.
 - Additional F&B uses – particularly restaurants e.g. ASK Italian, North Hill Noodle Bar, Middletons Steakhouse & Grill – are focused on North Hill / North Station Road located just beyond Experian Goad’s survey boundary. Actual F&B provision in the Town Centre is therefore under-stated in the table above.
 - Average unit sizes range from 110sqm to 270sqm (gross), with cafes and fast-food outlets unsurprisingly comprising the smallest units.
 - The number of units occupied by bars, cafes and restaurants has increased relative to the survey findings of November 2015 (set out in the 2016 Study); when there were 13 bars, 32 cafes and 28 restaurants. The number of public houses has remained the same (13) while the 2016 Study does not identify the number of fast-food outlets.

- The offer comprises a mix of national ‘chain’ and independent operators. The family-friendly casual dining sector is particularly well represented.
- As commented previously, new F&B representation since the 2016 Study includes three restaurants at Greytown House on High Street (namely Five Guys, Wagamama and Turtle Bay). These new restaurants complement other nearby provision such as Bills, Pizza Express, El Guaca and Mirra.

6.7 Colchester Town Centre has a range of other commercial leisure facilities.

6.8 The cinema offer is particularly important in terms of its contribution to the evening economy and supporting retail uses. There are two cinemas: Odeon (Head Street)⁶³ with 8-screens and seating capacity for 1,257 persons; and Curzon (Queen Street) which opened in July 2018 and includes 3-screens, offering a more premium cinema experience.

6.9 Colchester Town Centre also includes two theatres: Mercury Theatre (Balkerne Gate) and Headgate Theatre (Chapel Street North). Mercury Theatre is undergoing refurbishment works as part of the £9m ‘Mercury Rising’ project, which has been delayed due to the Covid-19 pandemic but is nearing completion and scheduled to re-open in Autumn 2020 (subject to Covid-19 restrictions) with a new box office, café/bar, dance studio, and dedicated learning and rehearsal spaces. Headgate Theatre is also temporarily closed to the public.

6.10 Other key leisure facilities in the Town Centre include:

- Buzz Bingo (previously Gala Bingo), Osbourne Street;
- The Gym (health and fitness club), Queen Street; and
- Firstsite (visual arts venue), Lewis Gardens, High Street.

Proposed new commercial leisure development: Colchester Town Centre

6.11 There are no major proposals for new commercial leisure development in Colchester Town Centre.

6.12 Planning permissions have been granted for potential leisure uses on Long Wyre Street (ref. 170424) and at the Alumno Site on Queen Street (ref. 182120). The latter allows for A3/A4/D2 uses as part of flexible commercial floorspace not exceeding 1,200 sqm. The site of the former Co-op department store on Long Wyre Street is currently the subject of residential-led development and the planning permission allows for five A3 restaurant units (2,098 sqm), although we understand these are unlikely to come forward.

Elsewhere in the Borough

6.13 Our healthcheck audits included at Appendix A identify the extent of existing F&B uses in the Borough’s District Centres. Provision is relatively limited and complementary to the retail offers.

6.14 A notable change since the 2016 Study has been the opening of Stane Leisure Park in 2018. It lies to the west of Tollgate District Centre and includes a McMullen’s public house, Starbucks coffee shop, and two restaurants (occupied by KFC and Nando’s respectively). There are currently two vacant restaurants.

6.15 Figure 6.2 below identifies other commercial leisure facilities in Colchester Borough.

⁶³ The 2016 household survey indicated that 23.8% of residents in Colchester’s catchment area ‘last’ visited this cinema, more than any other competing cinema. This survey pre-dated the opening of the Curzon cinema.

Figure 6.2 – Commercial Leisure Facilities, Colchester Borough (excluding Town Centre)

Cinemas	Location
<i>Nightflix Drive-in Cinema [1]</i>	Tollgate West, Tollgate
Tenpin Bowling	Location
Tenpin	Cowdray Avenue
Gymnasiums / Health Clubs	Location
Bannatyne Health Club <i>Bannatyne Health Club - formerly Clarice House</i> David Lloyd Leisure Leisure World <i>Everlast Fitness Club - formerly Sports Direct Fitness</i> Anytime Fitness Anytime Fitness <i>You Fit - formerly Spirit Health Club</i> Topnotch Health Club <i>Fitness 4 Less</i> <i>Energie Fitness</i> Gym 4 U Gymophobics <i>Pure Gym</i> Pump Gyms Hercules Gym YourZone45	Whitehall Industrial Estate, Grange Way Kingsford Park, Layer Road United Way, Mile End Cowdray Avenue Clarendon Way Moss Road, Peartree Road The Hythe, Haven Road Abbotts Lane Wyncolls Road, Highwoods Wyncolls Road, Highwoods Stanway Retail Park, Peartree Road Peartree Road The Mulberry Centre, Haven Road Colchester Retail Park, Sheepen Road Whitehall Industrial Estate, Grange Way Colne Bank Avenue Angora Business Park, Peartree Road
Other Active Leisure Facilities	Location
Rollerworld & Quasar (roller skating and laser tag) <i>Colchester Climbing Project (indoor climbing)</i> Jump Street (trampolining) Go Bananas (soft play) Childsplay Adventureland (soft play) Jungle Adventure (soft play) Colchester School of Gymnastics (gymnastics club) Iceni (gymnastics club)	Eastgate Industrial Estate, Moorside Globe Park, Moorside Cowdray Centre, Mason Road Cowdray Centre, Mason Road Clarendon Way Stanway Retail Park, Peartree Road Brinkley Grove Road, Mile End Moss Road, Peartree Road

Notes:

Facilities that have opened since the 2016 Study are **highlighted**.

[1] *Nightflix Drive-in Cinema* is a pop-up cinema concept on the former Sainsbury's site.

Source:

CPW Planning research and the 2016 Study.

6.16 As shown in the table above, Colchester Borough currently has one tenpin bowling venue: Tenpin⁶⁴ located on Cowdray Avenue. Other active leisure facilities include roller skating and laser tag (Rollerworld & Quasar) and indoor climbing (Colchester Climbing Project), both situated within industrial warehouse accommodation at Moorside. The Borough is well served by gymnasiums / health clubs, with several new openings since the 2016 Study.

Proposed new commercial leisure development: Elsewhere in the Borough

6.17 There are major proposals for new commercial leisure development in Colchester Borough, particularly at Tollgate (Stanway) and North Colchester, as identified below.

- Tollgate Village (Stanway): Reserved matters approved for a retail-led scheme including a multiplex cinema (to be operated by The Light), a tenpin bowling facility, and 2,100 sqm gross of A3/A4/A5 food and beverage uses.
- Northern Gateway (North Colchester): Extant planning permission for a new leisure-based scheme including a 12-screen cinema (to be operated by Cineworld), a hotel, three large

⁶⁴ Includes 24 bowling lanes, pool tables and amusement arcades.

format active leisure units (D2), and 4,548 sqm of A3/A5 food and beverage uses. A revised application involving less A3/A5 floorspace and more D2 floorspace⁶⁵ is awaiting determination.

- 6.18 There are additional, small-scale leisure uses consented as part of the Stane Retail Park development (namely A3/A4/A5 food and beverage uses not exceeding 327 sqm) while Lidl has submitted a revised application for the sub-division of the former Homebase store on St Andrew's Avenue to include a new A3/A5 use.

Conclusions

- 6.19 Overall, we consider that the quantity and quality of commercial leisure provision in Colchester Town Centre and elsewhere in the Borough to be reasonably strong. The F&B offer is substantial and it remains to be seen whether the operator 'failures' and downsizing in this sector will have implications for existing provision in Colchester and/or the committed developments at Tollgate Village and Northern Gateway. However, the restaurant vacancies at Stane Leisure Park and within the Curzon cinema scheme in the Town Centre are perhaps an indication of market saturation.
- 6.20 The Borough's cinema offer has improved since the opening of Curzon (Queen Street), which is likely to have reduced the level of cinema participation 'leakage' beyond Colchester Borough as identified in the 2016 Study. The proposed new cinemas at Northern Gateway (Cineworld) and Tollgate Village (The Light) will further diversify the cinema offering.
- 6.21 We assess that the Borough is well served by gymnasiums / health clubs and other active leisure facilities such as indoor climbing, roller skating and laser tag. A new indoor climbing facility is proposed as part of the Northern Gateway scheme, while the tenpin bowling facilities proposed at Northern Gateway and Tollgate Village will provide choice beyond the existing venue (Tenpin) on Cowdray Avenue.
- 6.22 In the light of the above, we do not consider the Council should allocate sites for major new commercial leisure provision in the Borough. There are no obvious quantitative or qualitative 'gaps' based on existing supply and the proposed new commercial leisure developments identified in this section. That said, leisure uses will continue to form an important part of mixed-use schemes and the Council should plan positively and flexibly for such uses in appropriate locations. Specific operator-led proposals should be considered on their merits having regard to the development plan and other material considerations.

⁶⁵ Comprising indoor golf (Puttstars), indoor climbing (Jump Street) and ten-pin bowling (Hollywood Bowl).

7 Opportunities for Growth and Change

- 7.1 NPPF 2012 requires local planning authorities to allocate sites to meet the needs for retail and other main town centre uses *in full*⁶⁶.
- 7.2 Section 5 of this Update considers the quantitative capacity (or need) for new retail floorspace in Colchester Borough over the plan period. It identifies that, whilst some of the shopping destinations (including Colchester Town Centre) will have limited capacity to support new retail floorspace, the overall picture (Borough-wide) is that there will be a theoretical over-supply of floorspace. This is largely due to the major committed developments, particularly at Tollgate and Non-central stores in the Borough.
- 7.3 Given there is no robust method of quantifying the floorspace need for other main town centre uses⁶⁷ we have undertaken a commercial leisure audit (section 6) and sought to examine, in qualitative terms, the increasingly important role of non-retail uses in achieving a balanced mix of uses and ‘experiences’ and ensuring the vitality of town centres (section 2 in particular and supported by the updated healthcheck audits at Appendix A).
- 7.4 Against this context we set out below our commercial review of potential development opportunities. In accordance with our instructions, our assessment is focused on the relevant Colchester Town Centre ‘allocations’ under Policy TC3 of the emerging Local Plan. Our high-level assessment considers the potential of each site to accommodate retail and other main town centre uses.
- 7.5 For the avoidance of doubt, our commentary on each site does not predetermine any particular form of development; this will be a matter for the decision-maker (having regard to the development plan and other material considerations) should proposals come forward. Further, our assessment is not informed by feasibility studies to better understand the development potential of a site and its constraints, or any appraisals to test financial viability. It is, however, an appropriate basis on which to validate or suggest any revisions to Policy TC3 of the emerging Local Plan (which we address in section 8 of this Update).

Vineyard Gate

- 7.6 The site lies within the southeast part of the Town Centre, with the Roman Wall to the north and Osbourne Street to the south. It extends to approximately one hectare and sits considerably lower than Eld Lane to the north (beyond the Roman Wall).
- 7.7 Situated nearby is Colchester bus station and Colchester Town rail station, and the ‘gateway’ credentials of the site would be enhanced further with the planned introduction of the Rapid Transit System (expected to be operational by 2024).
- 7.8 A large portion of the site is currently used as a surface level car park. It is understood that the entire site is owned by the Council, with remaining occupiers under short-term leases with break clauses.
- 7.9 The site is identified in the St Botolph’s Quarter Masterplan (June 2005) as a key development site for *prime retail development* to create *an active and efficient extension* of the Town Centre’s retail circuit. At the time of the 2016 Study, the site represented a long-standing Council priority for retail-led redevelopment. The retail market in the UK has changed significantly since then, however, and there is growing competition from nearby shopping

⁶⁶ Paragraph 23, sixth bullet.

⁶⁷ In the same way there is for retail (and offices).

destinations. As a result, the Council is now focused on delivering a residential-led mixed use scheme including public realm to showcase the site's heritage features.

- 7.10 We consider that a residential-led mixed use scheme, which enhances the level of connectivity with Eld Lane to the north, would revitalise this part of the Town Centre. It would act as a catalyst for inward investment and generate additional footfall to support retail and non-retail businesses. Other potential uses could include cultural, visitor and/or community facilities; flexible office and/or workshop space; and retail and/or leisure services.

St Botolph's

- 7.11 The site is situated to the east of Queen Street on the eastern edge of the Town Centre. It benefits from good pedestrian connections to/from High Street, Culver Street East, and Priory Walk.
- 7.12 The site includes the Roman House building and adjacent derelict land (Alumno Site).
- 7.13 The mixed-use regeneration of the site has been a long-standing Council objective. The St Botolph's Quarter Masterplan (June 2005) promotes the site for *new cultural, retail, residential and visitor facilities* including a visual arts venue (which was completed in 2011 in the form of Firstsite) and *restaurant, café and arts related uses*.
- 7.14 It is important to highlight that, since the 2016 Study, the Curzon cinema scheme has opened within the repurposed Roman House building; while planning permission has been granted on appeal for the redevelopment of the Alumno Site for student accommodation, hotel, artist studios, and flexible commercial floorspace.
- 7.15 We assess that the Curzon cinema scheme has contributed towards the improvement of the Town Centre's leisure offer since the 2016 Study. However, the scheme includes two vacant restaurants at ground floor level, which is perhaps a consequence of the 'downsizing' trend in the restaurant sector⁶⁸ and/or an indication of market saturation⁶⁹.
- 7.16 The planned redevelopment of the Alumno Site would further revitalise this part of the Town Centre. In particular, we consider the new population arising from the student accommodation, together with users of (and visitors to) the hotel and other commercial uses, would have a positive impact on levels of footfall and activity. It would help to create the conditions necessary to reposition and attract investment in the surrounding area, including Priory Walk (considered further below).

Priory Walk

- 7.17 Priory Walk is a secondary shopping centre situated between Queen Street and Long Wyre Street to the east of the Town Centre. It is anchored by Sainsbury's and has a declining number of occupied retail units.
- 7.18 Our updated healthcheck audit of Colchester Town Centre⁷⁰ identifies that the shopping centre is in a poor state and in need of investment; and has an adverse impact on the environmental quality of the surrounding streets. Therefore, there is considerable potential to improve its contribution to the vitality of the Town Centre, either through reconfiguration and refurbishment (with retail floorspace potentially forming a reduced component) or comprehensive redevelopment.

⁶⁸ See paragraphs 2.54-2.55 of section 2.

⁶⁹ As noted in paragraph 6.19 of section 6.

⁷⁰ Appendix A.

- 7.19 Any proposals should seek to retain Sainsbury's, which is the Town Centre's main supermarket and performs an important role catering for the main food and (more likely) top-up food shopping needs of town centre users.
- 7.20 Significantly, the site is bookended by recent investments in the form of the Curzon cinema scheme⁷¹ to the east and the St Nicholas Quarter residential-led development on Long Wyre Street to the west, creating more favourable conditions for much-needed investment in Priory Walk.
- 7.21 The delivery of a mixed use scheme – potentially including retail, flexible commercial and/or community uses at ground floor with residential uses above – would complement nearby recent investments and planned redevelopment, and help to attract further investment in this part of the Town Centre.

⁷¹ In addition to the planned redevelopment of the Alumno Site.

8 Policy Recommendations

- 8.1 As part of our instructions on this Update, the Council has asked that we provide advice on a suite of policies set out in the emerging Local Plan. These are:
- Policy SG5 (Centre Hierarchy)
 - Policy SG6 (Town Centre Uses)
 - Policy TC1 (Town Centre Policy and Hierarchy)
 - Policy TC2 (Retail Frontages)
 - Policy TC3 (Town Centre Allocations)
 - Policy NC1 (North Colchester and Severalls Strategic Economic Area)
 - Policy WC1 (Stanway Strategic Economic Area)
- 8.2 This section specifically considers whether these policies, as currently drafted and in the context of NPPF 2012, are fit-for-purpose or whether any revisions are necessary in response to the updated evidence base⁷².
- 8.3 Our policy recommendations will be incorporated into the Council's Topic Paper 4 (Retail and Town Centre Policies) prepared to support the forthcoming examination.
- 8.4 **Policy SG5** (including Table SG5a) defines Colchester Borough's hierarchy of centres. It states that the centres *will be the preferred location for main town centre uses* and identifies three 'tiers' of centre (Town⁷³ / District⁷⁴ / Local Centres) and definitions for each.
- 8.5 We consider that the hierarchy of centres and their definitions are appropriate (supported by the results of the 2016 household survey and the updated healthcheck audits at Appendix A). Although there are major development proposals at Tollgate (i.e. Tollgate Village and Stane Retail Park), we assess that it is not necessary or appropriate to change its position in the centre hierarchy based on these proposals. We consider below how Policy SG6 and/or Policy WC1 can be used as a tool for managing future development in this location.
- 8.6 **Policy SG6** is a development control policy for proposals comprising main town centre uses. It sets out the sequential approach to site selection (consistent with paragraph 24 of NPPF 2012) and adds:
- Sites should be assessed in terms of their availability, suitability and viability for the broad scale and type of development proposed; and only when alternative sites have been discounted should less sequentially preferable sites be considered.*
- 8.7 We note the term "*broad scale and type of development*" is not used in NPPF 2012. All it requires (in paragraph 24) is that local planning authorities *should apply a sequential test to planning applications for main town centre uses* (where applicable) and that applicants and local planning authorities *should demonstrate flexibility on issues such as format and scale*. We would recommend the policy wording reflects these particular requirements.
- 8.8 The remainder of the policy relates to the impact test and matters of hierarchy. We deal with each of the criteria in turn.

⁷² For the avoidance of doubt, we have not been instructed to comment on the supporting text (only the policy wording).

⁷³ Colchester Town Centre.

⁷⁴ Tiptree, West Mersea, Wivenhoe, Tollgate, Peartree Road, Turner Rise, and Highwoods.

- 8.9 Criteria (i/ii) wording seeks to ensure that proposals for main town centre uses are appropriate in the context of the centre hierarchy (the definitions set out in Policy SG5 provide a basis for assessment). This is a sound approach, in our view, although the Council should consider making it clearer that the criteria relate specifically to proposals in and on the edge of the Town and District Centres.
- 8.10 Criteria (iii) wording relates to the *character or amenity of the area* and is therefore beyond the scope of this Update.
- 8.11 Criteria (iv/v) wording reflects the impact test set out in paragraph 26 of NPPF 2012. We consider that no changes are necessary.
- 8.12 Criteria (vi) wording sets out when impact assessments are required, including when proposals exceed the floorspace thresholds identified in Table SG6.
- 8.13 Paragraph 26 of NPPF 2012 makes it clear that the impact test only applies to proposals over 2,500 sqm unless there is a different *proportionate, locally set floorspace threshold*. The thresholds shown in Table SG6 reflect those contained in the Specification for Retail Assessments (December 2017) prepared by Cushman & Wakefield. It sets particular floorspace thresholds for each Town and District Centre for comparison retail, convenience retail, and leisure services.
- 8.14 We consider that a more simplified approach would be appropriate in the light of the increasingly mixed-use nature of development proposals, including the trend toward space-sharing by retailers and other operators⁷⁵, which is likely to become more prevalent given the changes in the retail sector and the introduction of the new Class E (which combines retail, commercial, business and service uses).
- 8.15 Figure 8.1 below sets out revised thresholds which we consider should be the ‘trigger’ for requiring impact assessments in respect of proposals for retail and/or leisure floorspace outside the Town and District Centres.
- 8.16 Separate floorspace thresholds are recommended for Colchester, Tollgate, Peartree Road, Turner Rise and Highwoods (i.e. within the Colchester Urban Area) and for Tiptree, West Mersea and Wivenhoe (i.e. outside the Colchester Urban Area). The thresholds consider the scale of any future proposals relative to the centres and the likely cumulative effects of committed developments previously identified in this Update.

Figure 8.1 – Floorspace thresholds for impact assessments in the Borough

Centre	Retail and/or leisure floorspace (sqm gross)
Colchester Tollgate Peartree Road Turner Rise Highwoods	1,500
Tiptree West Mersea Wivenhoe	1,000

- 8.17 Those centres within the Colchester Urban Area are larger and/or include larger unit sizes. They tend to have a trading overlap in terms of their market shares of catchment area expenditure and are more likely to be affected by the committed developments (to varying

⁷⁵ See paragraphs 2.37-2.42 of section 2.

degrees). In contrast, the District Centres of Tiptree, West Mersea and Wivenhoe are smaller, more localised ‘rural’ centres; and we assess that a lower floorspace threshold is necessary given their greater reliance on smaller format convenience goods shops and small-scale service uses.

- 8.18 Given the impact test only applies to *development outside of town centres, which are not in accordance with an up-to-date Local Plan* (paragraph 26 of NPPF 2012), we recommend that the criteria (vi) wording is updated to reflect this.
- 8.19 **Policy TC1** supports the role of Colchester Town Centre at the top of the centre hierarchy and as the *priority focus for new Town Centre uses and larger scale development*. Its support for a *diverse mix of uses* is consistent with the findings of this Update in that, whilst retail (and comparison goods retail in particular) should remain a key driver of activity in Colchester Town Centre, the need for a complementary mix of non-retail (including evening economy) attractions is increasingly important in the context of reduced retailer demand and consumers’ preference for all-round experiences.
- 8.20 We consider the policy is sufficiently flexible to respond to these trends; and is compatible with the Government’s intention to support the adaption of high streets through the introduction of Class E. To that end, the Council should consider including reference to shared mixed-use spaces and meanwhile uses⁷⁶ that can positively contribute towards the vitality of the Town Centre.
- 8.21 **Policy TC2** is the policy for primary and secondary frontages in Colchester Town Centre. It therefore seeks to address paragraph 23 (third bullet) of NPPF 2012.
- 8.22 Policy TC2 seeks to maintain at least 70% A1 retail use on primary frontages and at least 50% A1 retail use on secondary frontages; unless non-viability of A1 retail use can be demonstrated (inter alia). Notwithstanding the introduction of the new Class E⁷⁷, we assess that setting minimum percentage thresholds is too rigid and inflexible. As an approach it can lead to unintended consequences and does not seem to be entirely consistent with the provisions of Policy TC1.
- 8.23 At a time when the Town Centre is faced with rising vacancy levels and a reduction in comparison goods retailers⁷⁸, as well as evidence of declining footfall (particularly due to the Covid-19 pandemic⁷⁹), we consider the most appropriate policy response involves a greater level of flexibility for changes of use within the primary and secondary frontages.
- 8.24 We would therefore recommend that the policy wording is updated to remove the minimum percentage thresholds for A1 retail use (including the requirement for “*extended marketing (over 1 year)*” to demonstrate non-viability of A1 retail use). However, to ensure the vitality of the Town Centre, it would remain appropriate for the Council to seek to control the mix of uses based on a series of qualitative criteria including those set out in Policy TC2.
- 8.25 Such criteria would allow for complementary non-retail uses to be provided in appropriate locations. In order to recognise that primary frontages should include a high proportion of retail uses (relative to secondary frontages⁸⁰), the Council should consider including a further

⁷⁶ Section 2 of this Update identifies the growing demand for such activity.

⁷⁷ The permitted development rights introduced by the Government, allowing for certain changes of use without the need for planning permission, further restrict the ability of the Council to effectively control the Town Centre’s shopping frontages.

⁷⁸ Since the 2016 Study.

⁷⁹ As identified in the updated healthcheck audit of Colchester Town Centre at Appendix A.

⁸⁰ See definition of “Primary and secondary frontages” (Annex 2, NPPF 2012).

criteria requiring that proposals should not harm the main retail function of the primary frontages.

- 8.26 **Policy TC3** identifies the Colchester Town Centre ‘allocations’ for retail and other main town centre uses (i.e. Vineyard Gate, St Botolph’s and Priory Walk as considered in section 7 previously). The policy wording should be updated to reflect the following:
- a) the updated retail capacity forecasts in section 5 are considerably lower than and supersede those set out in the 2016 Study;
 - b) the Council’s strategy for Vineyard Gate has changed (since the 2016 Study) and is now focused on delivering a residential-led mixed use scheme; and
 - c) the ‘need’ for retail and other main town centre uses will be addressed through the Colchester Town Centre allocations, together with the more flexible policy response set out previously.
- 8.27 **Policy NC1** applies a zoned approach to planning for the future development of North Colchester and Severalls Strategic Economic Area. Of particular relevance to the scope of this Update is zone 2, which is identified for a *leisure / community hub* (inter alia).
- 8.28 Paragraph 24 of NPPF 2012 requires *main town centre uses to be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered*. However, it is understood that the “*leisure / community hub*” proposals intend to complement the existing stadium and leisure facilities in the area and, providing the Council is satisfied that more centrally located sites have been considered (and discounted) in accordance with the sequential test, we would support the continuation of an approach where North Colchester is identified for a leisure / community hub. We would further support the restriction on retail uses included in the policy wording.
- 8.29 The policy also promotes *a range of sport and recreation uses* in zone 3 (subject to evidence supporting the need for such uses and proposals being in accordance with an agreed masterplan). Again, as an approach this is acceptable providing the Council is satisfied that the requirements of the sequential test have been met for the purposes of plan-making.
- 8.30 **Policy WC1** applies a zoned approach to planning for the future development of Stanway Strategic Economic Area. The policy identifies zone 1 as *the primary focus for B class employment uses* and sets out a series of criteria for allowing non-B class uses.
- 8.31 It then adds *main town centre uses will not be permitted* in zone 1. Given that offices are main town centre uses⁸¹ and the policy includes criteria for allowing alternative uses, we consider that the restriction on “*main town centre uses*” is inconsistent with the Policy WC1 provisions for zone 1 (when read as a whole) and should therefore be removed.
- 8.32 Zone 2 comprises Tollgate District Centre. The main thrust of the policy is similar to Policy SG6 (criteria i/ii), in that it seeks to ensure that proposals *are suitable for, and proportionate to, the role and function of the centre and its place within the hierarchy*. Although we assess that this is a sound approach, we would question whether it is necessary for Policy WC1 to repeat the provisions of Policy SG6.
- 8.33 Policy WC1 further includes a series of criteria for allowing main town centre uses in zone 2 (i.e. Tollgate District Centre). We deal with each of the criteria in turn.

⁸¹ See definition of “Main town centre uses” (Annex 2, NPPF 2012).

- 8.34 Criteria (i) wording supports the introduction of new services and/or community facilities, which we would support given the identified lack of such provision.
- 8.35 Criteria (ii) wording sets out the requirements of the sequential test consistent with paragraph 24 of NPPF 2012 and the provisions of Policy SG6.
- 8.36 Criteria (iii) wording reflects, in part, the impact test set out in paragraph 26 of NPPF 2012 and the provisions of Policy SG6 (specifically criteria iv). It omits reference to the other limb of the impact test⁸² and the Council should consider including this.

⁸² Impact on “*existing, committed and planned public and private investment...*”.

9 Conclusions

- 9.1 This Update has been prepared by CPW Planning and provides the evidence base to assist the Council with its work on the retail and town centre policies of the emerging Local Plan, and to support the Council's development management function. It supersedes the 2016 Study prepared by Cushman & Wakefield.
- 9.2 In accordance with our instructions, the updated evidence base reflects the requirements of and is compliant with the NPPF 2012 (against which the emerging Local Plan is being examined).
- 9.3 The Update has been prepared in the context of the latest available information and recent events, including the Covid-19 pandemic and changes to the Use Classes Order (i.e. Class E). A further notable change since the 2016 Study has been the grant of planning permissions for new retail and leisure floorspace in the Borough, in particular the major development proposals at Tollgate (Stanway) and North Colchester.
- 9.4 To that end, the main objectives of this Update can be summarised as follows:
- a) review national trends in the retail sector (particularly in response to Covid-19);
 - b) updated healthcheck audits of the Borough's centres;
 - c) updated retail capacity forecasts in the light of committed developments and the latest population and expenditure projections;
 - d) updated commercial leisure audit;
 - e) assess the potential to meet identified needs (as required by the NPPF 2012); and
 - f) identify any policy revisions in response to the updated evidence base.

- 9.5 We summarise below the main findings and conclusions of this Update.

National retail context and the potential implications for the Borough's centres:

- 9.6 It is likely that the pandemic-induced restrictions on the retail, leisure and hospitality industries will continue to have a significant impact on town centre footfall and activity. We consider that Colchester Town Centre is particularly vulnerable given its exposure to 'non-essential' fashion-orientated retailers, and reliance on leisure and hospitality (including the evening economy), other cultural activities and office/retail workers to generate expenditure.
- 9.7 Several factors including slower expenditure growth projections, the continued growth of online shopping, together with the scale of collapsed or 'at risk' retailers (and those downsizing or relaunching as online-only brands), highlight the reality that many town centres have too much retail space overall. We identify in section 3 of this Update the reduction in comparison goods retailers and increasing vacancy levels in Colchester Town Centre, which should be taken into account when planning for new retail – particularly comparison goods retail – floorspace in the Town Centre.
- 9.8 The trend towards 'right-sizing' has led retailers (and increasingly leisure operators) to target the most defensible and therefore high-demand locations, where footfall and consumer spending is most resilient to economic changes. This is now affecting more and more larger centres, as investors become increasingly selective and polarise towards fewer, prime retail locations. The Borough's centres have been reasonably stable in terms of retailer representation since the 2016 Study (based on our updated healthcheck audits at Appendix A), although the considerable reduction in comparison goods retailers in Colchester Town Centre would suggest it is increasingly exposed and at risk to such trends.

- 9.9 A key challenge for Colchester Town Centre will be retaining and improving the mix of retailers and other services. To achieve this, the Town Centre will need to (inter alia):
- create the right conditions for investment in areas currently lacking in environmental quality (e.g. Priory Walk, St John's Walk Shopping Centre) to complement the improvements delivered – and planned – in other areas of the Town Centre (as identified in section 3 of this Update);
 - improve accessibility, public transport connections, and car parking;
 - provide opportunities for flexible store formats with click-and-collect facilities and servicing arrangements that meet the needs of modern retail businesses; and
 - support a mix of retail and non-retail (including evening economy) attractions that are distinguished from those available at competing shopping destinations, and which help to increase dwell times and spend.
- 9.10 Diversifying beyond traditional retail offers will be necessary in the context of reduced retailer demand. This underlines the important role of shared mixed-use spaces and meanwhile uses, which provide interest and high-quality experiences that cannot be achieved online: town centre strategies should therefore be flexible in supporting the evolution of the high street.
- 9.11 Like successful retail businesses, the Borough's centres should look to integrate their physical and digital propositions in response to 'tech-savvy' consumer expectations and an increasingly competitive marketplace.

Updated healthcheck audits of the Borough's centres:

Colchester Town Centre

- 9.12 Colchester Town Centre is the principal comparison goods shopping destination in the Borough supported by a mix of non-retail uses and services. Although 'major' retailer representation is broadly unchanged since the 2016 Study, notable changes in the Town Centre's performance over this period include.
- The number of comparison goods retailers has fallen considerably (from 241 to 190), which represents a trend occurring in many centres across the UK but one that is increasingly affecting larger centres such as Colchester;
 - Vacancy levels are rising (from 10.5% of total ground floor premises to 14.5%) with some prominent vacant premises at the east of the Town Centre in particular;
 - Both footfall and car park stays have declined, especially during the Covid-19 crisis;
 - The all-round leisure offer has shown signs of improvement with the opening of the Curzon cinema scheme (Queen Street), alongside the new restaurants including at Greytown House (High Street) and the refurbishment works to Mercury Theatre (Balkerne Gate);
 - High Street has benefitted from the completion of public realm works (while further improvements are proposed for St Nicholas Square and Balkerne Gate using the £1m accelerated Towns Fund).
- 9.13 Overall, we assess that Colchester Town Centre continues to perform reasonably well against many of the healthcheck indicators. Yet there are weaknesses and signs that the Town Centre is increasingly vulnerable to structural changes in the retail sector and growing competition from nearby shopping destinations. The current outlook and the committed developments at Tollgate (Stanway) in particular, reinforce the need for measures to maintain the Town Centre's attractiveness and role as the principal mixed-use shopping destination in Colchester

Borough. This includes continued investment in the public realm and key opportunity sites (including Vineyard Gate, Priory Walk and St John's Walk Shopping Centre) to improve the visitor experience and create a more vibrant, differential offer.

Tiptree

- 9.14 Tiptree District Centre continues to perform an important role in terms of serving the convenience-based shopping and service needs of surrounding communities. It is supported by three national supermarket chains – Asda, Iceland and Tesco – and includes a range of independent retail service businesses, together with a medical centre, community centre and library. Tiptree has a limited evening economy.

West Mersea

- 9.15 West Mersea District Centre provides a modest range of retail, service and community facilities that cater for the day-to-day needs of local residents as well as the centre's visitor function. The retail offer is dispersed throughout the centre and is largely focused on convenience retail (the main convenience stores are Tesco Express, Co-op and Spar). There is a library, post office and sports/leisure centre, while the small number of independent cafes/restaurants provide a limited evening economy.

Wivenhoe

- 9.16 Wivenhoe District Centre is a small, linear, and somewhat fragmented centre serving the basic retail and service needs of local residents. There are two convenience stores (Co-op and One Stop), a Boots (chemist), and a small number of independent shops selling 'boutique' clothing and other personal goods. It serves an important localised role.

Tollgate

- 9.17 Tollgate is the Borough's largest District Centre and has evolved from a predominantly 'bulky' retail park into an established, sub-regional shopping destination with extensive surface level car parking. It includes a Sainsbury's superstore and a substantial range of multiple comparison goods retailers. Notwithstanding the limited changes to retailer representation since the 2016 Study, we assess it remains the case that Tollgate has a strong influence over shopping patterns across the catchment area (which extends well beyond Colchester Borough) and directly competes with Colchester Town Centre for comparison goods expenditure.
- 9.18 The centre is lacking in terms of services and community facilities. It contains several food and drink outlets, with additional provision at Stane Leisure Park to the west of the District Centre.
- 9.19 Considering this recent development (Stane Leisure Park) and the planning permissions granted for major new retail and leisure floorspace (i.e. Tollgate Village and Stane Retail Park), Tollgate is evidently a growing multi-purpose destination and competitor to Colchester Town Centre.

Peartree Road

- 9.20 Peartree Road District Centre comprises large format comparison goods stores and warehouses selling predominantly 'bulky goods' (exceptions include Poundstretcher and Barnardo's). The centre also includes a Co-op convenience store, Domino's Pizza, Greggs (bakery), and some active leisure uses (e.g. gymnasiums).

Turner Rise

- 9.21 Turner Rise District Centre comprises a large Asda superstore and a purpose-built retail park with large format stores. There are several 'value' comparison goods retailers such as Poundland, Home Bargains and Dunelm. Consistent with the 2016 Study, there are no vacant

units; no independent retailers; while services are limited to food and drink outlets (namely Pizza Hut, Costa Coffee and Subway) and the Asda in-store optician, pharmacy, and café.

Highwoods

- 9.22 Highwoods District Centre is dominated by a Tesco Extra superstore with in-store concessions including a pharmacy, print shop, café, and the Florence & Fred clothing range. It therefore functions primarily as a main food shopping destination for surrounding communities. Other uses within the adjacent shopping centre are predominantly independent businesses (e.g. newsagents, dry cleaners, hairdressers).

Non-central locations

- 9.23 There are additional facilities outside the centre hierarchy in the form of retail parks (e.g. Colchester Retail Park, Colne View Retail Park), ‘solus’ large format retail warehouses, foodstores, and commercial leisure facilities.
- 9.24 A major new leisure-based scheme is proposed at Northern Gateway (North Colchester) including a 12-screen Cineworld, a hotel, three large format active leisure units (D2), and A3/A5 food and beverage uses.

Updated retail capacity forecasts:

- 9.25 Our forecasts for the Borough’s shopping destinations over the forecasting period to 2033 represent the ‘baseline’ scenario for new retail floorspace in the Borough, in which we assume that the 2016 pattern of market shares of convenience and comparison goods expenditure in each of the Borough’s shopping destinations – indicated by the 2016 household survey (adjusted by CPW Planning) – remains unchanged throughout the forecasting period, notwithstanding the potential impact of committed developments on shopping patterns and market shares over time.
- 9.26 The tables below show that, whilst some of the shopping destinations will have limited capacity to support new retail floorspace, the overall picture (Borough-wide) is that there will be a theoretical over-supply of floorspace. This is largely due to the major committed developments, particularly at Tollgate and Non-central stores in the Borough.

Summary of retail capacity forecasts: convenience goods (sqm net sales area)

	2023	2028	2033	Table number (Appendix B)
Colchester Town Centre	-150	100	350	13
Tollgate	-2,350	-1,950	-1,600	22
Turner Rise	-800	-500	-200	31
Peartree Road	-50	50	50	40
Highwoods	100	350	550	49
Tiptree	-300	-150	-50	57
Non-central stores in the Borough	-3,900	-3,400	-3,000	66
Combined forecasts for Colchester Borough	-7,450	-5,500	-3,900	n/a

Notes:

- a) The forecasts are ‘baseline’ forecasts after allowing for the committed developments.
- b) The forecasts are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.
- c) Forecasts rounded to the nearest 50 sqm net.
- d) The grand totals (i.e. combined forecasts) may not exactly equal the sub-totals due to rounding.

Summary of retail capacity forecasts: comparison goods (sqm net sales area)

	2023	2028	2033	Table number (Appendix B)
Colchester Town Centre	2,100	2,850	2,950	13
Tollgate	-15,050	-14,650	-14,600	22
Turner Rise	50	200	200	31
Peartree Road	100	150	200	40
Highwoods	-50	0	0	49
Tiptree	500	500	550	57
Non-central stores in the Borough	1,400	1,650	1,700	66
Combined forecasts for Colchester Borough	-11,400	-9,850	-9,550	n/a

Notes:

- a) The forecasts are 'baseline' forecasts after allowing for the committed developments.
- b) The forecasts are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.
- c) Forecasts rounded to the nearest 50 sqm net.
- d) The grand totals (i.e. combined forecasts) may not exactly equal the sub-totals due to rounding.
- e) The forecasts for Non-central stores in the Borough assume any new comparison goods floorspace would trade at a typical average sales density for non-food retail warehouses. However, in the event that the forecast capacity or any part of it can be accommodated in town centre or edge-of-centre format developments, the capacity would be less than shown because town centre formats typically trade a higher sales densities than retail warehouses.

9.27 The updated retail capacity forecasts serve as a guide for future planning policies and decisions on planning applications. The forecasts should be reviewed regularly in the light of actual population and (in particular) expenditure growth, the outlook for which is subject to change given Covid-19 and the macro-economic conditions. It will also be important to review the forecasts as and when committed developments come forward and their effects become more measurable.

Updated commercial leisure audit:

9.28 We consider that the quantity and quality of commercial leisure provision in Colchester Town Centre and elsewhere in the Borough to be reasonably strong. The F&B offer is substantial and it remains to be seen whether the operator 'failures' and downsizing in this sector will have implications for existing provision in Colchester and/or the committed developments at Tollgate Village and Northern Gateway. However, the restaurant vacancies at Stane Leisure Park and within the Curzon cinema scheme in the Town Centre are perhaps an indication of market saturation.

9.29 The Borough's cinema offer has improved since the opening of Curzon (Queen Street), which is likely to have reduced the level of cinema participation 'leakage' beyond Colchester Borough as identified in the 2016 Study. The proposed new cinemas at Northern Gateway (Cineworld) and Tollgate Village (The Light) will further diversify the cinema offering.

9.30 We assess that the Borough is well served by gymnasiums / health clubs and other active leisure facilities such as indoor climbing, roller skating and laser tag. A new indoor climbing facility is proposed as part of the Northern Gateway scheme, while the tenpin bowling facilities proposed at Northern Gateway and Tollgate Village will provide choice beyond the existing venue (Tenpin) on Cowdray Avenue.

9.31 Overall, therefore, we do not consider the Council should allocate sites for major new commercial leisure provision in the Borough. There are no obvious quantitative or qualitative 'gaps' based on existing supply and the proposed new commercial leisure developments identified in this Update. That said, leisure uses will continue to form an important part of

mixed-use schemes and the Council should plan positively and flexibly for such uses in appropriate locations. Specific operator-led proposals should be considered on their merits having regard to the development plan and other material considerations.

Opportunities for growth and change:

- 9.32 Our review of potential development opportunities for retail and other main town centre uses is focused on the relevant Colchester Town Centre ‘allocations’ under Policy TC3 of the emerging Local Plan (i.e. Vineyard Gate, St Botolph’s and Priory Walk).

Vineyard Gate

- 9.33 Due to significant changes in the retail market and the growing competition from nearby shopping destinations, the Council is now focused on delivering a residential-led mixed use scheme including public realm to showcase the site’s heritage features.
- 9.34 We consider that a residential-led mixed use scheme, which enhances the level of connectivity with Eld Lane to the north, would revitalise this part of the Town Centre. It would act as a catalyst for inward investment and generate additional footfall to support retail and non-retail businesses. Other potential uses could include cultural, visitor and/or community facilities; flexible office and/or workshop space; and retail and/or leisure services.

St Botolph’s

- 9.35 Since the 2016 Study, the Curzon cinema scheme has opened within the repurposed Roman House building. The scheme includes two vacant restaurants at ground floor level, which is perhaps a consequence of the ‘downsizing’ trend in the restaurant sector and/or an indication of market saturation.
- 9.36 Planning permission has been granted on appeal for the redevelopment of adjacent derelict land (Alumno Site) including student accommodation, hotel, artist studios, and flexible commercial floorspace.
- 9.37 The planned redevelopment of the Alumno Site would further revitalise this part of the Town Centre. In particular, we consider the new population arising from the student accommodation, together with users of (and visitors to) the hotel and other commercial uses, would have a positive impact on levels of footfall and activity. It would help to create the conditions necessary to reposition and attract investment in the surrounding area, including Priory Walk.

Priory Walk

- 9.38 There is considerable potential to improve the site’s contribution to the vitality of the Town Centre, either through reconfiguration and refurbishment (with retail floorspace potentially forming a reduced component) or comprehensive redevelopment.
- 9.39 Any proposals should seek to retain Sainsbury’s, which is the Town Centre’s main supermarket and performs an important role catering for the main food and (more likely) top-up food shopping needs of town centre users.
- 9.40 The delivery of a mixed use scheme – potentially including retail, flexible commercial and/or community uses at ground floor with residential uses above – would complement nearby recent investments (i.e. the Curzon cinema scheme and the St Nicholas Quarter residential-led development on Long Wyre Street) and planned redevelopment (i.e. the Alumno Site), and help to attract further investment in this part of the Town Centre.

Policy recommendations for the emerging Local Plan:

- 9.41 We have reviewed a suite of policies set out in the emerging Local Plan (namely Policies SG5, SG6, TC1, TC2, TC3, NC1 and WC1) and, overall, assess that only limited revisions are necessary in the light of the updated evidence base.
- 9.42 The limited revisions proposed in section 8 of this Update seek to ensure that the retail and town centre policies are consistent with the requirements of NPPF 2012; and address recent events (including the Covid-19 pandemic and changes to the Use Classes Order) and other notable changes since the 2016 Study, in particular the grant of planning permissions for new retail and leisure floorspace at Tollgate (Stanway) and North Colchester.
- 9.43 Our policy recommendations will be incorporated into the Council's Topic Paper 4 (Retail and Town Centre Policies) prepared to support the forthcoming examination.

Appendix A (Updated Healthcheck Audits)

COLCHESTER TOWN CENTRE

October 2020

Centre classification in the emerging Local Plan (Policy SG5): Town Centre.

Diversity of uses:

Figure 1 below sets out the diversity of uses in Colchester Town Centre based on the latest survey undertaken by Experian Goad (November 2019), relative to the survey findings of November 2015.

The analysis focuses on a number of use categories, as defined by Experian Goad, namely:

- Comparison Retail (e.g. clothing and footwear, furniture, jewellery, electrical goods, toys);
- Convenience Retail (e.g. butchers, bakers, supermarkets);
- Retail Services (e.g. dry cleaners, hairdressers and beauticians, travel agents);
- Leisure Services (e.g. cafes, restaurants);
- Financial & Business Services (e.g. banks, estate agents); and
- Vacant.

Figure 1 – Diversity of uses, Colchester Town Centre

Use Categories	November 2019				November 2015			
	Units (count)	Units (%)	Floorspace (sqm)	Floorspace (%)	Units (count)	Units (%)	Floorspace (sqm)	Floorspace (%)
Comparison Retail	190	29.6	45,049	39.0	241	36.7	53,856	44.9
Convenience Retail	50	7.8	9,783	8.5	49	7.5	7,618	6.3
Retail Services	102	15.9	8,101	7.0	93	14.2	7,953	6.6
Leisure Services	152	23.7	27,648	23.9	141	21.5	26,505	22.1
Financial & Business Services	55	8.6	8,882	7.7	64	9.7	10,322	8.6
Vacant	93	14.5	16,072	13.9	69	10.5	13,778	11.5
TOTAL	642	100	115,535	100	657	100	120,032	100

Source:

November 2019 figures from Experian Goad.

November 2015 figures derived from the Retail and Town Centre Study 2016.

The main findings from the analysis include:

- Comparison Retail continues to account for the highest proportion of units (29.6%) and floorspace (39%), as expected for a centre the size of Colchester, but the number of units dedicated to this use has fallen considerably since 2015 (from 241 to 190); and represents a trend occurring in many centres across the UK. Given the reduction in floorspace has been less substantial (from 53,856sqm to 45,049sqm), it is likely that smaller-sized units previously occupied by Comparison Retail uses have become vacant or now accommodate alternative uses.
- Of the total number of Comparison Retail units (190), 52 are occupied by retailers of clothing and footwear, 22 are charity shops, and there are 14 jewellers.

- The number of units dedicated to Convenience Retail (50 or 7.8% of the total number of units) is broadly unchanged since 2015, although there has been a notable increase in floorspace (from 7,618sqm to 9,783sqm) over this period.
- Leisure Services are the second most dominant use category and help to extend dwell time and support the retail offer. There are currently 152 units accommodating such uses (compared to 141 in 2015) including 41 cafes, 31 restaurants and 28 hot-food takeaways.
- There are 102 units occupied by Retail Services, of which some 76 are health and beauty salons (including hairdressers). This represents a slight increase in the number of units accommodating Retail Services since 2015, although the proportion of floorspace dedicated to such uses is broadly unchanged.
- The findings in respect of Financial & Business Services indicate a reduction in both units and floorspace since 2015, perhaps reflective of the continued shift towards online banking and other professional services.

Vacancy levels:

A notable finding from the analysis set out in the table above is that, since November 2015, vacancy levels in Colchester Town Centre have increased considerably; from 69 vacant ground floor premises (10.5% of the total) to 93 in November 2019 (14.5%). This compares with the national average of around 12%.

Over the same period, the overall quantum of vacant floorspace has risen from 13,778sqm (11.5% of total floorspace) to 16,072sqm (13.9%). The average vacant unit size is therefore currently in the region of 170sqm.

During our site inspections, we observed a particular concentration of vacant ground floor premises at the east of the Town Centre, at Priory Walk and adjacent shopping streets (namely Long Wyre Street and Queen Street). Notable vacancies include the former Holland & Barratt store at Priory Walk; and on Long Wyre Street, the former Poundland store, the Argos store (closed at present due to the Covid-19 situation), and the site of the former Co-op department store (currently the subject of the St Nicholas Quarter residential-led development including A1/A3 premises at ground floor level). To the south of Priory Walk, the new Curzon cinema scheme on Queen Street includes two vacant restaurants.

Other large and/or particularly prominent vacant ground floor premises within the Town Centre include:

- former Laura Ashley store, Culver Street West (adjacent to H. Samuel);
- former Boots Opticians and adjacent store, Lion Walk (between Primark and Poundland);
- former Mountain Warehouse store, High Street (adjacent to McDonald's);
- former Oasis store, High Street (adjacent to Barclay's); and
- former Poundland store, St John's Walk Shopping Centre.

The largest vacant premises identified in the 2016 Study, the former BHS store at Lion Walk, is now occupied by Primark.

Retailer representation and the balance between independent and multiple stores:

Colchester Town Centre has a strong retail offer, with a mixture of independent shops and established national brands. It is particularly well represented by mass market fashion-orientated retailers such as H&M, New Look, Next, Primark and River Island; but continues to be under-represented by higher end comparison goods retailers as identified in the 2016 Study. In terms of convenience goods provision, the Town Centre includes Sainsbury's, Tesco Express, Iceland and the M&S Food Hall.

Figure 2 below identifies the 'major retailers' (as defined by Experian Goad) present in Colchester Town Centre. Representation is broadly unchanged since the 2016 Study, although the Primark

store at Lion Walk opened in 2017. Argos (Long Wyre Street) is temporarily closed at present, due to the Covid-19 situation.

Figure 2 – Major retailer representation, Colchester Town Centre

Department Stores	Mixed Goods Retailers	Supermarkets	Clothing	Other Retailers
Debenhams Marks & Spencer	Argos Boots TK Maxx WH Smith Wilkinson	Sainsbury's Tesco (Express)	H&M Monsoon Accessorize (x2) New Look Next Primark River Island Topman Topshop	Carphone Warehouse Clarks Clintons EE (x2) HMV O2 Superdrug Vodafone Waterstones

Source:

Experian Goad and CPW Planning research including site inspections (September 2020).

Most of these major retailers are concentrated in and around Lion Walk and Culver Square. Notable exceptions include the Argos store, Wilkinson (St John's Walk Shopping Centre) and Sainsbury's (Priory Walk).

Fenwick department store, whilst not identified as a major retailer by Experian Goad, is a key 'anchor' and has benefitted from a major refurbishment in recent years. It accommodates several in-store concessions and brands (e.g. All Saints, Barbour International, Hobbs, Hugo Boss, Paul Smith) that underpin the premium retail offer. Other multiples in the Town Centre include Fat Face, Schuh, Shoe Zone, White Stuff, Lush, Paperchase, and Smiggle.

The leisure offer helps to support the Town Centre's retail function and includes two cinemas: the long-established Odeon (Head Street) and Curzon (Queen Street), which opened in 2018. Mercury Theatre (Balkerne Gate) is a further significant attraction. The theatre is currently closed for refurbishment works but scheduled to re-open in Autumn 2020 subject to Covid-19 restrictions.

There is a good variety of cafes/bars/restaurants that contribute to evening economy. New representation since the 2016 Study includes three restaurants at Greytown House on High Street (namely Five Guys, Wagamama and Turtle Bay) complementing other nearby provision such as Bills, Pizza Express, El Guaca and Mirra.

Figure 3 below shows the balance between independent and multiple stores in Colchester Town Centre.

Figure 3 – Number of independent and multiple stores, Colchester Town Centre

Use Categories	Independent Stores (count)	Multiple Stores (count)
Comparison Retail	92	98
Convenience Retail	36	14
Retail Services	87	15
Leisure Services	103	49
Financial & Business Services	29	26
TOTAL	347	202

Source:

Figures derived from Experian Goad (November 2019).

There is a risk that too many multiples can dilute the character and identity of a centre; however, we consider that Colchester Town Centre has a well-balanced mix of independent and multiple stores. The independent stores help to provide a distinguished retail offer and therefore a unique experience for shoppers and other town centre users. During our site inspections, we identified a high number of such shops and stores along Sir Isaac's Walk / Eld Lane and the streets and passages between High Street and the main shopping centres.

Customers' experience and behaviour:

We outline below the key findings of the 2016 Study (based on the 2016 household survey) in the absence of any more up-to-date survey evidence:

...few consumers in Colchester Borough – including the town's immediate catchment (Zone 1) – do most of their main food shopping in the town centre.

As expected for a centre the size of Colchester, it secures substantial market shares of comparison goods expenditure from the catchment area. To this end, the town centre's comparison goods shopping offer is particularly strong in terms of clothing and footwear and books; jewellery and watches; china, glassware and kitchen utensils; recreational and luxury goods. The main competing destinations in this respect – according to the household interview survey – include Chelmsford (town centre), Braintree (town centre and retail parks), Clacton-on-Sea (town centre and retail parks) and Tollgate.

The opening of Primark in 2017 is likely to have increased the Town Centre's market shares of comparison goods expenditure – particularly on clothing and footwear. However, the impact of this new attraction needs to be considered in the context of other recent performance indicators; for example, the overall reduction in comparison goods retailers, rising vacancy levels, and declining town centre footfall (identified below).

The 2016 Study further highlighted that, *Car parking is a notable dislike about Colchester Town Centre, with 12.9% [of survey respondents who use the Town Centre for shopping and services] expressing the view that parking is too expensive and a further 10.2% stating that it is difficult to park near shops.* We have identified no significant improvements in this respect.

Pedestrian flows:

During our site inspections, we observed the highest pedestrian flows at Culver Square and Lion Walk, and along Sir Isaac's Walk in particular. The western section of High Street, close to the Fenwick and M&S 'anchor' stores, was also reasonably busy.

Pedestrian flows were lower towards the more peripheral areas of the Town Centre, where there is reduced quality in the retail/leisure offer and fewer footfall-generating attractions.

Footfall data has been obtained from the centre managers of Culver Square and Lion Walk.

Figure 4 below shows the levels of footfall recorded at Culver Square for each quarter of 2015, 2019 and (insofar as available) 2020. Despite the shopping centre's retailer line-up remaining broadly the same, there was a general decline in footfall between 2015 and 2019. This may be attributable to many reasons, including the national trend of reduced footfall in town centre locations; and/or more Colchester-specific reasons such as the increasing attractiveness of competing and out-of-centre shopping destinations, and the shift in the Town Centre's retail focus towards Lion Walk where Primark opened in 2017.

Figure 4 – Footfall counts, Culver Square

Culver Square	Q1	Q2	Q3	Q4	TOTAL
2015	1,351,718	1,423,089	1,507,869	1,895,551	6,178,227
2019	1,135,135	1,141,624	1,204,974	1,391,911	4,873,644
2020	892,083	157,409*	654,161**	n/a	1,703,653

Source:

Colchester Borough Council from the centre managers.

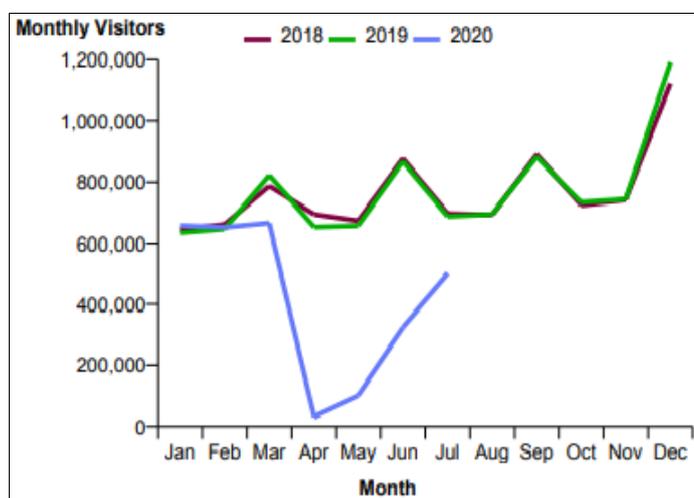
Notes:

* Shopping centre closed due to Covid-19.

** Counts exclude September 2020.

As the 2020 footfall counts at Culver Square confirm, pedestrian flows in Colchester Town Centre have fallen significantly due to the Covid-19 crisis. The graph in Figure 5 below illustrates the impact of the national lockdown on visitor levels at Lion Walk specifically (relative to the levels recorded in 2018 and 2019 respectively). Whilst the total number of visitors in July 2020 (501,695) is down 27% on July 2019 levels (687,230), the upward trend since May/June 2020 is encouraging for the future recovery.

Figure 5 – Footfall trends, Lion Walk



Source:

Colchester Borough Council from the centre managers (derived from Sensormatic summary report for July 2020).

Accessibility:

Colchester Town Centre is a transport ‘hub’ for the wider Borough and is accessible by public transport, private car, and walking and cycling.

The shopping centres and streets focused within the core of the Town Centre are pedestrianised and, generally, there is a good level of connectivity for pedestrians and cyclists.

It has two rail stations: Colchester Town (approximately 200m to the south of the Town Centre) and Colchester (approximately 1.5km to the north of the Town Centre). Colchester Town is the primary station serving the town and provides direct rail services London Liverpool Street, Ipswich, Norwich and Clacton-on-Sea (inter alia). It is connected to the Town Centre with highly frequent bus services, while the pedestrian route has been enhanced through the ‘Fixing the Link’ initiative.

Colchester bus station is situated at the southeast of the Town Centre, off Stanwell Street and Osbourne Street, with routes to destinations throughout the Borough and beyond (including to

Stansted and Southend Airports). There are a number of bus stops throughout the Town Centre including on St John’s Walk, High Street, Head Street and Queen Street.

The A134 runs to the south and west of Colchester Town Centre and serves the main vehicular routes into the Town Centre, while High Street / East Street is another key vehicular route from the east. In terms of car parking, the Town Centre is well served by several large car parks. The largest multi-storey facilities are St John’s Car Park (645 spaces) and St Mary’s Car Park (617 spaces). Other town centre car parks include Britannia Car Park, Middleborough Car Park, Priory Street Car Park, Sheepen Road Car Park, and Vineyard Street Car Park.

Data shared by the North Essex Parking Partnership in respect of the abovementioned car parks indicates that, over the period 2016-2019, the sum of car park stays reduced by approximately 3.5% (from 1,443,355 in 2016 to 1,393,370 in 2019).

Figure 6 below includes the quarterly data for 2019 compared to the corresponding data for 2020. It demonstrates the significant impact of Covid-19 on town centre car park stays, particularly during April-June (down 86.4% on the previous year) and during July-September (down 55.1%) in the light of pandemic-induced restrictions and the emphasis on home-working.

Figure 6 – Car park stays (all tariffs), Colchester Town Centre

	2019	2020	Percentage change (%)
Q1 (January-March)	333,398	287,468	-13.8
Q2 (April-June)	343,743	46,883	-86.4
Q3 (July-September)	341,101	153,051	-55.1

Source:

Colchester Borough Council from the North Essex Parking Partnership.

Environmental quality:

As a historic centre, Colchester offers an attractive setting for shopping and services. Our main observations include:

- High Street is a traditional, linear shopping street. It includes attractive buildings and some key retailers such as Fenwick, Next, and Marks & Spencer. A programme of public realm works was recently completed, which included improvements to the pavements on both sides of the High Street between North Hill (to the west) and Queen Street (to the east).
- Culver Square and Lion Walk shopping centres are pedestrianised and offer a relatively high-quality environment for shoppers and other users. They comprise a high proportion of the Town Centre’s large, modern shop units. However, consistent with the findings of the 2016 Study, we consider the degree of connectivity between them is relatively poor and creates an incoherent retail circuit.
- Narrow streets and passageways, such as Pelham’s Lane and Red Lion Walk, connect the High Street with the main shopping centres. These provide a unique setting and make a positive contribution to the Town Centre’s environmental quality.
- Sir Isaac’s Walk and Eld Lane comprise a narrow route aligned with small shop units, creating a pleasant and somewhat intimate shopping environment. The route is reasonably pedestrian-friendly (at the time of our site inspections it was marked/segregated for social-distancing purposes) and has good connections into the town’s main shopping centres.
- The Town Centre’s secondary shopping centres, Priory Walk and St John’s Walk Shopping Centre, are in a poor state and in need of investment. They have an adverse impact on the environmental quality of the surrounding streets.
- Queen Street has benefitted from investment since the 2016 Study with the opening of the Curzon cinema scheme (within the repurposed Roman House building). As well as providing

a new attraction, the scheme has enhanced the streetscape on the eastern side of Queen Street close to Priory Walk (albeit the ground floor restaurants remain vacant).

- Other public realm improvements have been identified by the Council focused on St Nicholas Square and Balkerne Gate (at the east and west of the Town Centre respectively). It is envisaged that these 'cultural gateway' schemes will be delivered by April 2021 using the £1m accelerated Towns Fund.
- The redevelopment of the former Co-op department store on Long Wyre Street, comprising the St Nicholas Quarter residential-led scheme (which is under construction), will complement the abovementioned improvements to St Nicholas Square. The site lies to the immediate west of Priory Walk.

Perception of safety:

We identified no significant adverse issues with regards to safety or security during our site inspections, which were conducted during the day. However, due to the 'dead' frontages and the general poor state of St John's Walk Shopping Centre and Priory Walk in particular, these areas of the Town Centre were found to be somewhat unwelcoming.

Opening hours and the evening economy:

Most of the Town Centre's shops and stores are open all week. Those focused within Culver Square and Lion Walk are typically open for trading until 18:00 Monday-Saturday, with reduced opening hours on Sundays.

The main supermarket, Sainsbury's (Priory Walk), is open from 07:00 to 19:00 Monday-Saturday, and from 10:30 to 16:30 on Sundays.

The variety of cafes/bars/restaurants and other commercial leisure attractions, including the two cinemas (Odeon and Curzon), extend the hours of activity and provide an evening economy.

Commercial rents and yields:

The 2016 Study reports prime Zone A rents of £170 per square foot (psf) at Lion Walk, as at mid-2016, with Culver Square achieving between £60-65 and £135 psf.

However, many centres across the UK are subject to declining rental levels in the face of company voluntary arrangements (CVAs) and shop closures.

Information published on Realla.co.uk and EstatesGazette.com in September 2020 indicates that:

- Vacant ground floor premises at Lion Walk are available to let for £85-105 psf;
- The rental levels currently sought at Culver Square and on High Street (e.g. former Mountain Warehouse store) are lower at around £40 psf;
- The vacant restaurants within the Curzon cinema scheme (Queen Street) are available to let for £30 psf; and
- Other, more secondary areas of the Town Centre are achieving sub-£30 psf rents.

Barriers to business investment:

We consider that, of all the Borough's centres, Colchester Town Centre is particularly vulnerable to the current and potential future impacts of Covid-19, with the reduction in town centre footfall and activity likely to have significant implications for business investment decisions.

Beyond Covid-19 related impacts, we consider that barriers to new businesses opening and/or existing businesses expanding (that are specific to the Town Centre) are likely to include:

- the increasing levels of competition from nearby existing (and proposed new i.e. Tollgate Village) shopping destinations;

- car parking issues (the 2016 household survey identified concerns that car parking is ‘too expensive’ and that it is ‘difficult to park near shops’) in contrast to other shopping destinations in the Borough, such as Tollgate District Centre and non-central retail parks, which are served by free, extensive and dedicated surface level car parking; and
- parts of the Town Centre, notably Priory Walk and St John’s Walk Shopping Centre, do not currently provide the conditions necessary to support business investment.

TIPTREEOctober 2020

Centre classification in the emerging Local Plan (Policy SG5): District Centre.

Diversity of uses:

The table below sets out the diversity of uses in Tiptree based on the latest town centre survey undertaken by Experian Goad (June 2017), relative to the survey findings of May 2015.

The analysis focuses on a number of use categories, as defined by Experian Goad, namely:

- Comparison Retail (e.g. clothing and footwear, furniture, jewellery, electrical goods, toys);
- Convenience Retail (e.g. butchers, bakers, supermarkets);
- Retail Services (e.g. dry cleaners, hairdressers and beauticians, travel agents);
- Leisure Services (e.g. cafes, restaurants);
- Financial & Business Services (e.g. banks, estate agents); and
- Vacant.

Use Categories	June 2017				May 2015			
	Units (count)	Units (%)	Floorspace (sqm)	Floorspace (%)	Units (count)	Units (%)	Floorspace (sqm)	Floorspace (%)
Comparison Retail	19	26.4	2,481	18.9	19	27.1	2,481	19.2
Convenience Retail	6	8.3	6,169	47.0	6	8.6	6,169	47.7
Retail Services	19	26.4	1,533	11.7	17	24.3	1,329	10.3
Leisure Services	13	18.1	1,022	7.8	13	18.6	1,022	7.9
Financial & Business Services	13	18.1	1,821	13.9	13	18.6	1,839	14.2
Vacant	2	2.8	93	0.7	2	2.8	93	0.7
TOTAL	72	100	13,119	100	70	100	12,933	100

Source:

June 2017 figures from Experian Goad.

May 2015 figures derived from the Retail and Town Centre Study 2016.

The number of units occupied by Comparison Retail (19), Convenience Retail (6), Leisure Services (13) and Financial & Business Services (13) is unchanged since 2015, indicating a high level of stability in recent years. The centre continues to serve a local convenience-based role, with a high proportion of floorspace dedicated to Convenience Retail and a range of service uses.

Vacancy levels:

The latest Experian Goad survey identifies two vacant premises, which was verified during our site inspections. This includes the shop unit formerly occupied by Boots.

Retailer representation and the balance between independent and multiple stores:

Tiptree is represented by three national supermarket chains: Asda, Iceland, and Tesco. The latter is an important 'anchor' for the centre, being centrally located off Church Road and with free surface level car parking. It includes an in-store bakery and fishmonger as well as limited (Florence & Fred) clothing ranges. Asda, which is slightly detached from the centre's main shopping area, provides a wide selection of convenience goods plus the George clothing range.

Boots (chemist) has closed since the 2016 Study and there are no other national multiple retailers. The centre does, however, support a relatively strong mix of independent businesses including a small range of clothing shops, opticians, dentist, pharmacy, dry cleaners, hairdressers, and cafes. There is also a medical centre, community centre and library. Barclays and Lloyds are the main retail banks.

Customers' experience and behaviour:

In the absence of any up-to-date survey evidence, and given there has been few notable changes in the centre's offer and performance, we identify the relevant findings of the 2016 Study as follows:

Based on the results of the 2016 household interview survey, the centre's convenience goods shopping offer (dominated by Tesco and Asda) principally serves the western parts of Colchester Borough. Some 20.4% of consumers in Zone 6 [Rural West] do most of their main food shopping in Tiptree, with limited expenditure inflows from the wider catchment area. It has a strong, localised 'top up' food shopping function.

The centre further secures notable market shares of expenditure on certain comparison goods subcategories from Zone 6 and also Zone 9 [Witham]. For example, around a quarter (24.5%) of consumers in Zone 6 do most of their shopping for chemists and medical goods, cosmetics and other beauty products in Tiptree. High proportions of consumers in Zones 6 and 9 do most of their shopping for household appliances in the centre (8.7% and 8.2% respectively).

Pedestrian flows:

During our site inspections, we observed the highest pedestrian flows around the Tesco store including the passageway connecting Church Road with Tesco's surface level car park, which was at approximately 70-80% capacity. The cafes and pavements on the eastern side of Church Road, directly opposite Tesco, were also relatively busy. We observed some pedestrians undertaking linked-trips between the centre's main shopping area and the Asda store to the north.

Accessibility:

Tiptree is situated approximately 16km to the southwest of the Borough's principal centre, Colchester. It is a linear centre focused along the B1023 (Church Road), with bus stops serving the main shopping area and the surrounding hinterland. There is no rail station.

Predominantly residential areas surround the centre, providing a substantial walk-in catchment. Tesco's customer car park provides free and convenient parking for visitors to the store and indeed the wider centre.

Environmental quality:

Notwithstanding the relatively high traffic movements along Church Road, Tiptree is a pleasant centre and well maintained.

Perception of safety:

We identified no adverse issues with regards to safety or security during our site inspections, which were conducted during the day.

Opening hours and the evening economy:

Most shops and stores are open all week (with the possible exception of Sundays). The centre's main convenience goods store, Tesco, is open from 08:00 to 22:00 Monday-Saturday, with reduced Sunday trading hours (10:00 to 16:00).

The centre has a limited number of 'evening economy' uses (pubs/bars/restaurants) but there are several hot food takeaways and cafes.

Commercial rents and yields:

There is no published information.

Barriers to business investment:

We have identified no evidence of significant barriers to new businesses opening and/or existing businesses expanding that are specific to Tiptree. The centre displays relatively strong performance in relation to many indicators (considering its scale and function), while the lack of vacant premises could be viewed as a barrier in terms of limiting business investment opportunities.

WEST MERSEA

October 2020

Centre classification in the emerging Local Plan (Policy SG5): District Centre.

Diversity of uses:

There are approximately 30 ground floor shop units, interspersed with residential uses, along the B1025 (High Street / Barfield Road / Kingsland Road).

As reported in the 2016 Study, the centre has a modest range of retail, service and community facilities. These cater for the day-to-day needs of local residents as well as the centre's visitor function.

The main convenience stores are Tesco Express, Co-op and Spar. We note that the Tesco Express customer car park has a 'drive thru' click-and-collect facility. Other existing uses are predominantly small scale and include a chemist (Boots), bike shop, butchers, hairdressers, and a small number of cafes and delicatessens that are popular with tourists and other visitors. There is also a library, post office and sports/leisure centre.

Vacancy levels:

During our site inspections, we observed only one vacant premises: a former public house at the junction of High Street and Coast Road.

Retailer representation and the balance between independent and multiple stores:

Within the limitations of its small scale, the centre has a balanced mix of independent and multiple stores. The national multiple retailers include Boots, Tesco Express, Co-op and Spar. These help to sustain the mix of independent businesses (identified above), which provide a more distinct offer.

Customers' experience and behaviour:

In the absence of any up-to-date survey evidence, and given there has been few notable changes in the centre's offer and performance, we identify the relevant findings of the 2016 Study as follows:

Based on the results of the 2016 household interview survey, the centre's convenience goods shopping offer principally serves the immediate catchment. To that end 8% of consumers in Zone 3 [Rural South] do most of their main food shopping in West Mersea, with little or no expenditure inflows from the wider catchment area. It has a strong, localised 'top up' food shopping function.

The centre further secures notable market shares of expenditure on a limited number of comparison goods sub-categories from Zone 3. For example, 13.6% of consumers in Zone 3 do most of their shopping for household appliances in West Mersea. In addition, perhaps reflecting the localised nature of shopping patterns for chemists and medical goods, cosmetics and other beauty products, some 18.9% of consumers in Zone 3 do most of their shopping for such goods in the centre.

Pedestrian flows:

During our site inspections, we observed the highest pedestrian flows along High Street; particularly around the public pay-and-display car park (behind the library) and the nearby cafes and delicatessens. Levels of footfall were moderately high around the Tesco Express and Co-op stores.

Accessibility:

West Mersea lies approximately 16km to the south of the Borough's principal centre, Colchester. The centre has a substantial walk-in catchment and is well served by bus stops along the B1025. There is no rail station.

The main car park is the public pay-and-display car park situated behind the library, on the western side of High Street. At the time of our site inspections (weekday lunchtime), this car park was at full capacity. The main convenience stores – Tesco Express, Co-op and Spar – also provide limited off-site car parking.

Environmental quality:

West Mersea's retail, service and community facilities are relatively dispersed throughout the centre. It has a pleasant 'village' character, especially at its southern end (close to Coast Road), where some of the cafes and delicatessens provide outdoor seating areas.

The centre's shop frontages are generally well maintained.

Perception of safety:

We identified no adverse issues with regards to safety or security during our site inspections, which were conducted during the day.

Opening hours and the evening economy:

The majority of the centre's shops and stores are open on weekdays and Saturdays. Tesco Express trades from 06:00 to 23:00 Monday-Saturday (from 07:00 on Sundays) and the Co-op store is open from 07:00 to 21:00 Monday-Saturday, with reduced Sunday trading hours.

The independent cafes/restaurants provide a limited evening economy.

Commercial rents and yields:

There is no published information.

Barriers to business investment:

We have identified no evidence of significant barriers to new businesses opening and/or existing businesses expanding that are specific to West Mersea. The centre displays relatively strong performance in relation to many indicators (considering its scale and function), while the lack of vacant premises could be viewed as a barrier in terms of limiting business investment opportunities.

WIVENHOE

October 2020

Centre classification in the emerging Local Plan (Policy SG5): District Centre.

Diversity of uses:

Wivenhoe comprises approximately 20 ground floor shop units, interspersed with residential and community uses. There are two convenience stores (Co-op and One Stop), which serve the day-to-day needs of local residents.

The comparison goods shopping offer is limited to Boots (chemist), a florist, opticians, and small shops selling books, gifts and 'boutique' clothing. The centre also includes a library, post office, estate agents, hairdressers, cafés/restaurants and a public house.

Vacancy levels:

No vacant premises were identified during our site inspections.

Retailer representation and the balance between independent and multiple stores:

Wivenhoe is represented by three national multiple retailers: Boots, Co-op and One Stop. These support the centre's limited range of independent businesses (identified above).

Customers' experience and behaviour:

In the absence of any up-to-date survey evidence, and given there has been few notable changes in the centre's offer and performance, we identify the relevant findings of the 2016 Study as follows:

Based on the results of the 2016 household interview survey, the centre's convenience goods shopping offer principally serves the immediate catchment. Reflecting the limited range of provision only 3.3% of consumers in Zone 3 [Rural South] do most of their main food shopping in Wivenhoe. It has a greater localised 'top up' food shopping function.

Unsurprisingly, the centre secures little or no market shares of comparison goods expenditure from Colchester's catchment area. The main exception is chemists and medical goods, cosmetics and other beauty products, with 6.9% of consumers in Zone 3 doing most of their shopping for such goods in Wivenhoe.

Pedestrian flows:

During our site inspections, we observed relatively modest levels of footfall along Wivenhoe's High Street. The busiest part of the centre was the small shopping parade (including One Stop and Boots) off Vine Drive, which benefits from dedicated off-street car parking.

Accessibility:

Wivenhoe is situated approximately 6km to the southeast of the Borough's principal centre, Colchester, which is accessible via the A133 (Clingoe Hill) and the B1028 (Colchester Road). To the

south of the centre, the River Colne constrains accessibility to/from the south-western parts of the Borough (e.g. West Mersea, Tiptree).

The centre has a substantial walk-in catchment. It has a rail station, and a number of bus stops along High Street and Station Road.

Environmental quality:

The centre has an attractive 'village' character, particularly at its southern end (i.e. south of Station Road) where the High Street narrows. Pavements and shop frontages are generally well maintained.

Perception of safety:

We identified no adverse issues with regards to safety or security during our site inspections, which were conducted during the day.

Opening hours and the evening economy:

The centre's main convenience stores are open all week; One Stop trades 07:00-22:00 (including on Sundays) while the Co-op store is open from 06:00 to 23:00 Monday-Saturday, and from 10:00 to 16:00 on Sundays. Boots trades from 08:30 to 18:30 on weekdays, and from 09:00 to 17:00 on Saturdays.

The public house and cafes/restaurants provide a limited evening economy.

Commercial rents and yields:

There is no published information.

Barriers to business investment:

We have identified no evidence of significant barriers to new businesses opening and/or existing businesses expanding that are specific to Wivenhoe. The centre displays relatively strong performance in relation to many indicators (considering its scale and function), while the lack of vacant premises could be viewed as a barrier in terms of limiting business investment opportunities.

TOLLGATE

October 2020

Centre classification in the emerging Local Plan (Policy SG5): District Centre.

Diversity of uses:

The table below sets out the diversity of uses in Tollgate (excluding Stane Leisure Park) based on our site inspections of September 2020, relative to the survey findings of November 2015.

The analysis focuses on a number of use categories, as defined by Experian Goad, namely:

- Comparison Retail (e.g. clothing and footwear, furniture, jewellery, electrical goods, toys);
- Convenience Retail (e.g. butchers, bakers, supermarkets);
- Retail Services (e.g. dry cleaners, hairdressers and beauticians, travel agents);
- Leisure Services (e.g. cafes, restaurants);
- Financial & Business Services (e.g. banks, estate agents); and
- Vacant.

Use Categories	September 2020				November 2015			
	Units (count)	Units (%)	Floorspace (sqm)	Floorspace (%)	Units (count)	Units (%)	Floorspace (sqm)	Floorspace (%)
Comparison Retail	23	71.9	28,845	67.1	24	75	30,285	70.4
Convenience Retail	2	6.3	10,740	25	2	6.3	10,740	25
Retail Services	1	3.1	190	0.4	1	3.1	190	0.4
Leisure Services	3	9.4	1,038	2.4	4	12.5	1,460	3.4
Financial & Business Services	1	3.1	330	0.8	1	3.1	330	0.8
Vacant	2	6.3	1,862	4.3	0	0	0	0
TOTAL	32	100	43,005	100	32	100	43,005	100

Source:

September 2020 figures based on CPW Planning research including site inspections.

November 2015 figures derived from the Retail and Town Centre Study 2016.

The main findings from the analysis include:

- Comparison Retail is the dominant use, accounting for approximately 70% of the total number of units (23) and floorspace (28,845sqm).
- The next highest proportion of floorspace (10,740sqm) is dedicated to Convenience Retail, focused within only two units: Sainsbury's and Iceland.
- The findings in respect of Convenience Retail, Retail Services and Financial & Business Services are unchanged since 2015.
- Leisure Services account for almost 10% of the total number of units, down slightly from 12.5% in 2015 owing to the closure of Chiquito.

Tollgate medical centre is not recorded in the table above. It represents an important facility within an area lacking in the provision of services and community facilities.

Stane Leisure Park, which sits to the west of the District Centre, is currently occupied by four Leisure Services (namely a public house, coffee shop and two restaurants). These uses have come forward since the 2016 Study.

Vacancy levels:

There are currently two vacant premises at Tollgate: the former Staples / Office Outlet at Tollgate West Retail Park (1,440sqm) and the former Chiquito restaurant (422sqm).

Staples / Office Outlet fell into administration in 2018 while the Restaurant Group, which owns Chiquito, closed the majority of its restaurants in March 2020 in response to the Covid-19 crisis (it is unclear whether the Tollgate closure is temporary or permanent).

Stane Leisure Park includes two vacant restaurants.

Retailer representation and the balance between independent and multiple stores:

The table below identifies current retailer representation at Tollgate.

Tollgate Centre	Tollgate West Retail Park	<i>Solus</i>
AHF (Anglia Home Furnishings)	B&M Bargains	Hobbycraft
Argos	Currys & PC World	Homebase
Bensons for Beds	Hughes Electrical	Magnet
Boots	The Carphone Warehouse	Sainsbury's
Carpetright		
Dreams		
Harveys		
Iceland		
Next / Next Home		
SCS		
Smyths Toys		
Sports Direct		
Tapi Carpets		
Wren Kitchens		

Source:
CPW Planning research including site inspections (September 2020).

Since the 2016 Study, Tapi Carpets has replaced Carpets 4 Less (which continues to trade elsewhere in Colchester at Turner Rise) and a new Hobbycraft has opened on the site of the former Seapets unit.

The centre's food and beverage offer includes McDonalds, Costa Coffee, Harvester and Frankie & Benny's; while the adjacent Stane Leisure Park accommodates Starbucks, KFC, Nando's and a McMullen's public house.

Customers' experience and behaviour:

In the absence of any up-to-date survey evidence, we outline below the relevant findings of the 2016 Study.

Based on the results of the 2016 household interview survey, Tollgate is the most popular main food shopping destination for consumers in Colchester's catchment area. High proportions of consumers from Colchester Borough in particular do most of their main food shopping at the

centre (most likely the Sainsbury's superstore) including 38% from Zone 6 [Rural West], 29% from Zone 1 [Colchester] and 11.9% from Zone 3 [Rural South].

Unsurprisingly, given the type and scale of the centre's comparison goods shopping offer, Tollgate directly competes with Colchester Town Centre and serves a Borough-wide catchment area. It is clearly also a principal shopping destination for consumers outside of Colchester Borough, securing substantial market shares of expenditure on certain comparison goods sub-categories from, inter alia, Zone 4 [Clacton], Zone 5 [Frinton / Harwich], Zone 7 [Halstead], Zone 8 [Braintree] and Zone 9 [Witham].

To this end, Tollgate's comparison goods shopping offer is particularly strong in terms of furniture, carpets and other floor coverings; household textiles and soft furnishings; household appliances; audiovisual equipment; and hardware, DIY goods, decorating supplies and garden products.

Tollgate further secures substantial market shares of expenditure on the other comparison goods subcategories – namely clothing and footwear; chemists and medical goods, cosmetics and other beauty products; and all other comparison goods – from Zones 1, 3 and 6 in particular.

We consider the recent changes to retailer representation (identified above) are likely to have had a limited effect on the centre's market shares of comparison goods expenditure. Overall, we assess that the 2016 household survey still provides a realistic picture of Tollgate's influence over shopping patterns across the catchment area.

Pedestrian flows:

During our site inspections, we observed the highest pedestrian flows within the Tollgate Centre (particularly at its western end close to Argos and Iceland). Its substantial surface level car park was at approximately 80% capacity.

The adjacent Tollgate West Retail Park was less busy; B&M Bargains appeared to be the most popular store.

Accessibility:

Tollgate is situated within the Stanway area approximately 5km to the west of Colchester Town Centre, off London Road (A1124) and adjacent to Junction 26 of the A12. It is therefore highly accessible by private car and has extensive surface level car parking.

There are bus stops along London Road and Tollgate West respectively, which provide services to/from the town centre and surrounding communities.

Tollgate is not served by a rail station.

Environmental quality:

Tollgate comprises purpose-built retail parks and a large Sainsbury's superstore, with significant areas dedicated to surface level car parking. It also includes several 'solus' retail and leisure operators such as Homebase, Hobbycraft and Harvester.

The centre appears generally well maintained but (as identified in the 2016 Study) significant traffic movements affect the pedestrian experience and act as a barrier between the centre's various components.

Perception of safety:

We identified no adverse issues with regards to safety or security during our site inspections, which were conducted during the day.

Opening hours and the evening economy:

Sainsbury's is open from 07:00 to 22:00 Monday-Saturday, with reduced trading hours on Sundays. The adjacent retail parks and warehouses are generally open until 18:00 or 19:00 throughout the week, although there are exceptions (e.g. Argos and Hobbycraft trade until 20:00 on weekdays).

The evening economy offer, which includes a small number of food and beverage operators, typically extends until 21:00 or 22:00 throughout the week.

Commercial rents and yields:

There is no published information.

Barriers to business investment:

We have identified no evidence of significant barriers to new businesses opening and/or existing businesses expanding that are specific to Tollgate, which is evidently the Borough's most attractive shopping destination outside and close to Colchester Town Centre.

Given the extant planning permissions for major new retail and leisure development (Tollgate Village and Stane Park Phase 2 respectively), we assess that future business investment in this location will largely depend on the extent and nature of operator demand.

PEARTREE ROAD

October 2020

Centre classification in the emerging Local Plan (Policy SG5): District Centre.

Diversity of uses:

The centre comprises a number of predominantly 'bulky' comparison goods stores and warehouses. Other uses include a convenience store (Co-op), bakery, hot food takeaway, and gymnasiums.

Vacancy levels:

No vacant premises were identified during our site inspections.

Retailer representation and the balance between independent and multiple stores:

Fiveways Retail Park to the north of Peartree Road accommodates a Co-op convenience store (including Subway and M&Co concessions), Poundstretcher, Mattressman, Barnardo's and an independent business selling windows, doors and conservatories. There is a Domino's Pizza and a Greggs (bakery), which has opened since the 2016 Study.

To the south and east lies several retail warehouses occupied by local and multiple retailers (or trade outlets). These include Hatfields (furniture and interiors), Hatfields Budget Clearance, Easy Bathrooms, It's Bed Time, J. Franks Beds, Toolstation and Topps Tiles.

Conway Furniture and Lewis's are the notable closures since the 2016 Study.

Customers' experience and behaviour:

In the absence of any up-to-date survey evidence, we outline below the relevant findings of the 2016 Study.

Based on the results of the 2016 household interview survey, a relatively limited proportion of consumers in Colchester's catchment area do most of their main food and/or comparison goods shopping at Peartree Road. However, the extent and type of provision would suggest that consumers are prepared to travel and do 'some' of their shopping for certain comparison goods at the centre, perhaps for occasional bulky goods.

Pedestrian flows:

During our site inspections, we observed the highest pedestrian flows within the retail park to the north of Peartree Road, particularly between Poundstretcher and the Co-op store. The centre's other main retail areas, selling 'bulky' comparison goods, predominantly serve car users and levels of footfall were relatively low.

Accessibility:

The centre is situated approximately 3.5km to the southwest of Colchester Town Centre, and less than 2km to the southeast of Tollgate. There are bus stops along Peartree Road, and no rail station.

Environmental quality:

The centre is characterised by retail parks and large format warehouses, with adjacent surface level car parking.

Perception of safety:

We identified no adverse issues with regards to safety or security during our site inspections, which were conducted during the day.

Opening hours and the evening economy:

Co-op is open from 07:00 to 21:00 Monday-Saturday, with reduced trading hours on Sundays. The surrounding comparison goods stores and warehouses are generally open all week, but tend to close earlier than the Co-op store.

There is no evening economy offer.

Commercial rents and yields:

There is no published information.

Barriers to business investment:

We have identified no evidence of significant barriers to new businesses opening and/or existing businesses expanding that are specific to Peartree Road, although the lack of vacant premises could be viewed as a barrier in terms of limiting business investment opportunities. It is considered that future business investment in this location will largely depend on the demand for large format retail stores and warehouses.

TURNER RISE

October 2020

Centre classification in the emerging Local Plan (Policy SG5): District Centre.

Diversity of uses:

Our analysis focuses on a number of use categories, as defined by Experian Goad, namely:

- Comparison Retail (e.g. clothing and footwear, furniture, jewellery, electrical goods, toys);
- Convenience Retail (e.g. butchers, bakers, supermarkets);
- Retail Services (e.g. dry cleaners, hairdressers and beauticians, travel agents);
- Leisure Services (e.g. cafes, restaurants);
- Financial & Business Services (e.g. banks, estate agents); and
- Vacant.

The table below sets out the current diversity of uses at Turner Rise, representing no change from the survey findings of December 2014. Whilst there have been changes to retailer representation (identified later), the centre's overall composition of units and floorspace by use is broadly unchanged.

Use Categories	Units (count)	Units (%)	Floorspace (sqm)	Floorspace (%)
Comparison Retail	7	63.6	11,060	56.2
Convenience Retail	2	18.2	8,280	42.1
Retail Services	1	9.1	30	0.2
Leisure Services	1	9.1	320	1.6
Financial & Business Services	0	0	0	0
Vacant	0	0	0	0
TOTAL	11	100	19,690	100

Source:

Figures derived from the Retail and Town Centre Study 2016.

The table shows the extent to which Turner Rise is dominated by large format retail stores, with the average Comparison Retail and Convenience Retail store measuring (at ground floor level) 1,580sqm and 4,140sqm respectively. The retail offer is supplemented by a small number of service uses.

Vacancy levels:

No vacant units identified during our site inspections.

Retailer representation and the balance between independent and multiple stores:

Turner Rise includes a large Asda superstore with an in-store optician, pharmacy, and café. It sells predominantly convenience goods (around 90% of total ground floor) with the remainder – plus mezzanine floor – dedicated to comparison goods. The customer car park has a 'drive thru' click-and-collect facility.

The adjacent retail park accommodates a range of multiple retailers: Poundland, Carpets 4 Less, Go Outdoors, Home Bargains, Dunelm, Bensons for Beds, and Jollyes Petfood Superstore. The most recent changes to retailer representation include Poundland and Carpets 4 Less replacing Bathstore and We Do Home.

The food and drink offer comprises Pizza Hut, Costa Coffee and Subway (unchanged since the 2016 Study).

There are no independent stores.

Customers' experience and behaviour:

In the absence of any up-to-date survey evidence, we outline below the relevant findings of the 2016 Study.

Based on the results of the 2016 household interview survey, the centre's convenience goods shopping offer (anchored by an Asda superstore) principally serves the central and northern parts of Colchester Borough. Some 13.3% of consumers in Zone 1 [Colchester] do most of their main food shopping at Turner Rise, followed by 4.3% in Zone 2 [Rural North].

Reflecting the centre's comparison goods shopping offer, it secures substantial market shares of expenditure on household textiles and soft furnishings – and is the Borough's third most popular shopping destination in this respect (behind Colchester Town Centre and Tollgate). High proportions of consumers from Colchester Borough (i.e. Zones 1, 2 and 3) and also from the wider catchment area (including Zones 4, 5, 6 and 7) do most of their shopping for such goods at Turner Rise.

The centre secures relatively limited market shares of expenditure on other comparison goods subcategories, with the exception of chemists and medical goods, cosmetics and other beauty products. For example, 7.1% of consumers in Zone 1 [Colchester] do most of their shopping for such goods at Turner Rise and this is likely to be attributable to the Asda superstore.

We consider the recent changes to retailer representation (identified above) are likely to have had a limited effect on the centre's market shares of comparison goods expenditure, particularly in respect of the 'bulky' sub-categories (e.g. household textiles and soft furnishings, furniture and floor coverings).

Pedestrian flows:

During our site inspections, we observed the highest pedestrian flows in and around the Asda superstore. Its customer car park was at 70-80% capacity, while the surface level car parking dedicated to the adjacent retail park was less busy (approximately 60% capacity).

Accessibility:

Turner Rise is situated less than two kilometres to the north of Colchester Town Centre, to the immediate north of the railway lines serving nearby Colchester rail station. Bus stops within Asda's customer car park and along the A134 provide services to/from the town centre and surrounding communities.

Environmental quality:

The centre comprises a large superstore (Asda) and a purpose-built retail park, focused around substantial surface level car parking. It appears generally well maintained.

Perception of safety:

We identified no adverse issues with regards to safety or security during our site inspections, which were conducted during the day.

Opening hours and the evening economy:

Asda is open 24-hours on weekdays, closing at 22:00 on Saturdays and with reduced Sunday trading hours (10:00 to 16:00). The adjacent retail park is generally open until 21:00 throughout the week.

The evening economy offer is limited to Pizza Hut, which opens from lunchtime until 22:00 or 23:00 throughout the week.

Commercial rents and yields:

There is no published information.

Barriers to business investment:

We have identified no evidence of significant barriers to new businesses opening and/or existing businesses expanding (aside from the finding that the retail park is fully occupied). Future business investment at Turner Rise will largely depend on the demand for large format retail stores, while the substantial surface level car park could provide opportunities for additional click-and-collect facilities and other convenience-based services.

HIGHWOODS

October 2020

Centre classification in the emerging Local Plan (Policy SG5): District Centre.

Diversity of uses:

Highwoods is dominated by a Tesco Extra superstore with in-store concessions including Harris & Hoole (café), Florence & Fred (clothing range), Max (print shop) and a pharmacy. The customer car park has a 'drive thru' click-and-collect facility. The superstore sells predominantly convenience goods (around 70% of total ground floor) with the remainder dedicated to comparison goods.

Other uses within the adjacent shopping centre include a dentist, post office, newsagents, dry cleaners, hairdressers, and a coffee shop. There is also a Timpson kiosk outside the Tesco Extra.

Vacancy levels:

During our site inspections, we identified one vacant unit within the shopping centre adjacent to the Tesco Extra.

Retailer representation and the balance between independent and multiple stores:

Tesco Extra and Timpson are the only national multiple retailers. The remainder of the centre comprises independent stores (identified above).

Customers' experience and behaviour:

In the absence of any up-to-date survey evidence, and given there has been few notable changes in the centre's offer and performance, we identify the relevant findings of the 2016 Study as follows:

Based on the results of the 2016 household interview survey, Tesco Extra is the Borough's second most popular main food shopping destination (behind the Sainsbury's superstore at Tollgate). High proportions of consumers do most of their main food shopping at Tesco Extra including some 19.2% from Zone 1 [Colchester], 10.5% from Zone 3 [Rural South] and 8.2% from Zone 2 [Rural North].

The centre secures relatively limited market shares of comparison goods expenditure from Colchester's catchment area.

Pedestrian flows:

At the time of our site inspections (weekday afternoon) the Tesco Extra superstore was reasonably busy. Its large customer car park was at 60-70% capacity.

Pedestrian flows between the superstore and the adjacent shopping centre were relatively modest.

Accessibility:

The centre is situated approximately 2.5km to the northeast of Colchester Town Centre, off Highwoods Approach. It is surrounded by residential areas and therefore serves a large walk-in catchment.

Highwoods is easily accessible by car. There are bus stops (Highwoods Square) close to the shopping centre.

Environmental quality:

The centre is characterised by the large superstore and its surface level car park.

The pedestrian thoroughfare between Tesco Extra and the adjacent shopping centre is poor and in need of improvement, not least to encourage linked-trips (at the time of our site inspections a section of the public realm was cordoned off).

Perception of safety:

We identified no adverse issues with regards to safety or security during our site inspections, which were conducted during the day. However, we consider the area of public realm between Tesco Extra and the adjacent shopping centre is likely to feel unwelcoming to pedestrians, especially after-dark.

Opening hours and the evening economy:

Tesco Extra is open from 06:00 to midnight Monday-Saturday, with reduced Sunday trading hours. The adjacent shopping centre is generally open throughout the week.

The centre is lacking any evening economy.

Commercial rents and yields:

There is no published information.

Barriers to business investment:

We have identified no evidence of significant barriers to new businesses opening and/or existing businesses expanding that are specific to Highwoods, although the lack of vacant premises could be viewed as a barrier in terms of limiting business investment opportunities. The substantial surface level car park could provide opportunities for additional click-and-collect facilities and other convenience-based services.

Appendix B (Updated Retail Capacity Tables)

Table:

8

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario:	1	Location:	Colchester Town Centre							
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.										
Market shares correction factors:		Convenience Goods:			140% of survey indicated figures					
		Comparison Goods:			80% of survey indicated figures					
Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2020 (%)	2023 (%)	2028 (%)	2033 (%)	BLANK COLUMN (%)	2020 (%)	2023 (%)	2028 (%)	2033 (%)	BLANK COLUMN (%)
1	13	13	13	13		38	38	38	38	
2	2	2	2	2		22	22	22	22	
3	8	8	8	8		32	32	32	32	
4	0	0	0	0		10	10	10	10	
5	1	1	1	1		21	21	21	21	
6	5	5	5	5		27	27	27	27	
7	2	2	2	2		14	14	14	14	
8	1	1	1	1		2	2	2	2	
9	0	0	0	0		2	2	2	2	

Sources: CPW Planning for market share corrections.

Table: 11

SALES CAPACITY OF EXISTING**MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN****2020**

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Sainsbury's (Priory Walk)	1,235	95	1,173	10,900	12,788
M&S Food Hall (High Street)			1,058	9,821	10,386
Iceland (St John's Walk)	480	98	470	7,219	3,396
Other convenience goods shops and stores	5,649	85	4,802	5,000	24,010
ALL STORES	7,364		7,503	6,741	50,579

Sources: Retail and Town Centre Study 2016. Experian Goad. CPW Planning.

Table: 12

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS**2020**

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
Alumno Site, Queen Street (planning application ref. 182120)	170	95	162	5,000	808
Former Co-op Department Store, Long Wyre Street (planning application ref. 170424)	150	95	143	5,000	713
ALL STORES	320		304		1,520
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Vacant Town Centre 'Comparison Goods' Floorspace	2,410	85	2,049	6,000	12,291
ALL STORES AND SCHEMES	2,410		2,049	6,000	12,291

Sources: Colchester Borough Council. Experian Goad. CPW Planning.

Table: 13
FORECAST RETAIL CAPACITY

Scenario:	1		Location:		Colchester Town Centre					
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.										
Growth in sales per sq m from shop floorspace existing in		2020			Comparison Goods:		2.00 % pa		2020 to	2033
	CONVENIENCE GOODS				COMPARISON GOODS					
	2020	2023	2028	2033	BLANK COLUMN	2020	2023	2028	2033	BLANK COLUMN
Residents' Spending £000	50,886	50,486	53,457	56,124		293,106	366,673	409,857	453,485	
Plus visitors' spending (%)	-	-	-	-		1.0	1.0	1.0	1.0	
Total spending (£000)	50,886	50,486	53,457	56,124		296,037	370,339	413,956	458,020	
Existing shop floorspace (sq m net)	7,503	7,503	7,503	7,503		47,763	47,763	47,763	47,763	
Sales per sq m net (£)	6,782	6,741	6,741	6,741		6,198	6,577	7,262	8,018	
Sales from extg flrspace (£000)	50,886	50,579	50,579	50,579		296,037	314,157	346,855	382,956	
Available spending to support new shops (£000)	0	-94	2,878	5,544		0	56,182	67,101	75,064	
Less sales capacity of committed new floorspace (£000)	0	1,520	1,520	1,520		0	42,713	47,158	52,067	
Net available spending for new shops (£000)	0	-1,614	1,358	4,024		0	13,469	19,942	22,997	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000		6,000	6,367	7,030	7,762	
Capacity for new shop flrspace (sq m net)	0	-134	113	335		0	2,115	2,837	2,963	
Market Share of Catchment Area Expenditure	5.3%	5.3%	5.3%	5.3%		21.8%	21.8%	21.8%	21.8%	

Sources: Experian Goad for Comparison Goods (ground floor) floorspace plus allowance by CPW Planning for mezzanine/upper floorspace.

Notes: Includes allowance for vacant 'comparison goods' floorspace in Colchester Town Centre; and comparison goods sales at Primark (Lion Walk).

Table:

16

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario:	1	Location:	Tollgate							
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.										
Market shares correction factors:		Convenience Goods:					80% of survey indicated figures			
		Comparison Goods:					85% of survey indicated figures			
Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2020 (%)	2023 (%)	2028 (%)	2033 (%)	BLANK COLUMN (%)	2020 (%)	2023 (%)	2028 (%)	2033 (%)	BLANK COLUMN (%)
1	19	19	19	19		23	23	23	23	
2	1	1	1	1		4	4	4	4	
3	8	8	8	8		15	15	15	15	
4	0	0	0	0		2	2	2	2	
5	1	1	1	1		4	4	4	4	
6	25	25	25	25		24	24	24	24	
7	0	0	0	0		6	6	6	6	
8	0	0	0	0		5	5	5	5	
9	2	2	2	2		4	4	4	4	

Sources: CPW Planning for market share corrections.

Table: 19

**SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

2020

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Sainsbury's (Western Approach)	10,650	58	6,177	10,900	67,329
Iceland (The Tollgate Centre)	744	98	729	7,219	5,264
ALL STORES	11,394		6,906	10,511	72,593

Sources: Retail and Town Centre Study 2016. CPW Planning.

Table: 20

SALES CAPACITY OF EXISTING COMPARISON GOODS FLOORSPACE

Store	Gross Flrspace (sq m)	Net Flrspace (sq m)	Sales Density (£per sqm net)	2016 Sales (£000)
Net to gross ratio: 90 % (unless otherwise indicated)				
Comparison Goods Floorspace in stores & warehouses:				
Currys & PC World	1,900	1,710	7,000	11,970
The Carphone Warehouse [1]	280	252	n/a	2,000
Next	1,906	1,715	4,404	7,555
Next Home	1,850	1,665	3,600	5,994
B&M Bargains	1,160	1,044	3,452	3,604
Smyths Toys	1,394	1,255	n/a	6,145
Hughes Electrical	990	891	10,800	9,623
Dreams	1,050	945	n/a	1,391
AHF (Anglia Home Furnishings)	2,261	2,035	2,160	4,395
Sports Direct	1,755	1,580	5,497	8,683
Wren Kitchens	910	819	3,360	2,752
Harveys	860	774	2,177	1,685
Bensons For Beds [2]	600	540	2,177	1,176
Carpentryright	1,270	1,143	1,266	1,447
Magnet	1,130	1,017	n/a	786
SCS	1,711	1,540	2,394	3,687
Tapi Carpets [3]	647	582	1,080	629
Boots	540	486	10,963	5,328
Argos	1,103	n/a	n/a	6,606
Homebase [4]	5,528	4,726	1,309	6,187
Hobbycraft [3]	659	563	4,200	2,366
Comparison Goods Floorspace in main foodstores:				
Sainsbury's (Western Approach)	n/a	4,473	8,300	37,126
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns		29,755	4,407	131,133

Sources: Retail and Town Centre Study 2016. CPW Planning.

Notes:

- (1) Currys & PC World concession.
- (2) Harveys upper floor.
- (3) Estimated sales density.
- (4) 3,888 sq m net sales but 5% excluded for trade / non-retail sales; includes concessions (e.g. Bathstore).

Where no sales density is indicated (n/a), sales are based on average sales per outlet.

Table: 21

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

2020

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
Tollgate Village (planning application ref. 150239) [1]	n/a	n/a	1,394	8,000	11,152
Aldi, Stane Retail Park, Stanway (planning application ref. 193163)	1,208	75	906	11,000	9,966
M&S Food Hall, Stane Retail Park, Stanway (planning application ref. 193163)	1,626	90	1,463	9,821	14,372
ALL STORES	2,834		3,763		35,490
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Tollgate Village (planning application ref. 150239) [1]	n/a	n/a	14,920	6,000	89,520
Vacant Retail Warehouse (Former Staples, Tollgate West Retail Park)	1,440	90	1,296	6,000	7,776
B&Q, Stane Retail Park, Stanway (planning application ref. 193163) [2]	7,547	90	5,094	1,758	8,956
Other Bulky Goods Stores, Stane Retail Park, Stanway (planning application ref. 193163) [3]	9,616	90	8,654	4,000	34,618
ALL STORES AND SCHEMES	18,603		29,965		140,869

Sources: Retail and Town Centre Study 2016. Colchester Borough Council. CPW Planning.

Notes:

- (1) Maximum net floorspace figure as per condition 9 of the outline planning permission.
- (2) 6,792 sq m net sales but 25% excluded for trade / non-retail sales. Excludes external space.
- (3) Includes mezzanine space.

Table: 22
FORECAST RETAIL CAPACITY

Scenario:	1		Location:	Tollgate						
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.										
Growth in sales per sq m from shop floorspace existing in 2020 Comparison Goods: 2.00 % pa 2020 to 2033										
	CONVENIENCE GOODS					COMPARISON GOODS				
	2020	2023	2028	2033	BLANK COLUMN	2020	2023	2028	2033	BLANK COLUMN
Residents' Spending £000	80,716	80,083	84,797	89,027		162,440	203,190	227,122	251,300	
Plus visitors' spending (%)	-	-	-	-		0.5	0.5	0.5	0.5	
Total spending (£000)	80,716	80,083	84,797	89,027		163,253	204,206	228,258	252,556	
Existing shop floorspace (sq m net)	6,906	6,906	6,906	6,906		29,755	29,755	29,755	29,755	
Sales per sq m net (£)	11,688	10,511	10,511	10,511		5,486	5,062	5,589	6,171	
Sales from extg flrspace (£000)	80,716	72,593	72,593	72,593		163,253	150,631	166,309	183,618	
Available spending to support new shops (£000)	0	7,490	12,204	16,434		0	53,575	61,949	68,938	
Less sales capacity of committed new floorspace (£000)	0	35,490	35,490	35,490		0	149,492	165,051	182,229	
Net available spending for new shops (£000)	0	-28,000	-23,286	-19,056		0	-95,916	-103,102	-113,291	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000		6,000	6,367	7,030	7,762	
Capacity for new shop flrspace (sq m net)	0	-2,333	-1,941	-1,588		0	-15,064	-14,666	-14,596	
Market Share of Catchment Area Expenditure	8.3%	8.3%	8.3%	8.3%		12.1%	12.1%	12.1%	12.1%	

Sources:

Notes:

Scenario	1
Turner Rise	

Table: **23**
CONVENIENCE GOODS MARKET SHARES IN **2020**

2020			
Turner Rise			
Zones	Main Food	Top-up convenience	WEIGHTED AVERAGE
	Q1	Q3	
	Expenditure weighting		
	70 (%)	30 (%)	100 (%)
1	13.3	4.7	10.7
2	4.3	2.5	3.8
3	1.9	2.3	2.0
4	1.1	0.0	0.8
5	3.2	0.0	2.2
6	1.9	1.2	1.7
7	2.7	0.0	1.9
8	0.6	1.5	0.9
9	0.0	0.0	0.0

Sources: Household Interview Survey 2016.
 Expenditure weighting by CPW Planning.

Table: **24**
COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN **2020**

2020 Allocations to									
Turner Rise									
Indicated by Household Interview Survey									
Zones	Clothing & footwear	Furniture/ floorcrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	WEIGHTED AVERAGE
	Q4	Q5	Q6	Q7	Q8	Q9	Q10	Q11	
	Expenditure weighting								
	490 (%)	147 (%)	103 (%)	131 (%)	231 (%)	187 (%)	502 (%)	856 (%)	2,648 (%)
1	1.3	1.4	23.6	0.5	0.0	4.1	7.1	1.1	3.3
2	0.0	0.0	10.0	0.0	0.0	1.3	3.7	0.0	1.2
3	0.0	0.0	16.8	0.0	0.0	0.0	0.9	2.6	1.7
4	0.7	1.5	9.0	0.7	0.0	0.0	0.0	0.0	0.6
5	1.0	0.0	8.0	0.0	0.0	0.0	0.0	0.0	0.5
6	1.2	0.0	13.9	0.0	0.0	0.0	2.3	0.0	1.2
7	2.3	3.7	5.9	1.2	1.3	0.0	1.9	0.0	1.4
8	0.0	0.0	2.5	0.0	0.9	0.0	0.0	0.0	0.2
9	0.0	0.0	2.5	0.0	0.0	0.0	0.0	0.0	0.1

Sources: Household Interview Survey 2016, with adjustments by CPW Planning.
 Table 4 for expenditure weights.

Table:

25

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario:	1	Location:	Turner Rise						
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.									
Market shares correction factors:		Convenience Goods:					160		% of survey indicated figures
		Comparison Goods:					210		% of survey indicated figures
Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED								
	CONVENIENCE GOODS					COMPARISON GOODS			
	2020 (%)	2023 (%)	2028 (%)	2033 (%)	BLANK COLUMN (%)	2020 (%)	2023 (%)	2028 (%)	2033 (%)
1	17	17	17	17		7	7	7	7
2	6	6	6	6		2	2	2	2
3	3	3	3	3		3	3	3	3
4	1	1	1	1		1	1	1	1
5	4	4	4	4		1	1	1	1
6	3	3	3	3		3	3	3	3
7	3	3	3	3		3	3	3	3
8	1	1	1	1		0	0	0	0
9	0	0	0	0		0	0	0	0

Sources: CPW Planning for market share corrections.

Table: 28

SALES CAPACITY OF EXISTING**MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN****2020**

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Asda (Petrolea Close)	6,096	75	4,572	14,600	66,751
Iceland (Petrolea Close)	744	98	729	7,219	5,264
ALL STORES	6,840		5,301	13,585	72,015

Sources: Retail and Town Centre Study 2016. CPW Planning.

Table: 29

SALES CAPACITY OF EXISTING COMPARISON GOODS FLOORSPACE

Store	Gross Flrspace (sq m)	Net Flrspace (sq m)	Sales Density (£per sqm net)	2016 Sales (£000)
Net to gross ratio: 90 % (unless otherwise indicated)				
Comparison Goods Floorspace in stores & warehouses:				
Go Outdoors	4,217	3,795	2,500	9,488
Home Bargains [1]	1,650	1,485	4,000	5,940
Carpets 4 Less [1]	690	621	1,200	745
Dunelm	3,060	2,754	2,647	7,290
Bensons For Beds	1,030	927	2,117	1,962
Poundland [1]	830	747	3,400	2,540
Jollyes Petfood Superstore	490	441	2,292	1,011
Comparison Goods Floorspace in main foodstores:				
Asda (Petrolea Close)	n/a	1,524	10,100	15,392
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns				
		12,294	3,609	44,369

Sources: Retail and Town Centre Study 2016. CPW Planning.

Notes: (1) Estimated sales density.

Table: 30

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS**2020**

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: 31
FORECAST RETAIL CAPACITY

Scenario:	1				Location:	Turner Rise				
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.										
Growth in sales per sq m from shop floorspace existing in 2020 Comparison Goods: 2.00 % pa 2020 to 2033										
	CONVENIENCE GOODS					COMPARISON GOODS				
	2020	2023	2028	2033	BLANK COLUMN	2020	2023	2028	2033	BLANK COLUMN
Residents' Spending £000	63,039	62,541	66,222	69,524		40,845	51,093	57,111	63,192	
Plus visitors' spending (%)	-	-	-	-		-	-	-	-	
Total spending (£000)	63,039	62,541	66,222	69,524		40,845	51,093	57,111	63,192	
Existing shop floorspace (sq m net)	5,301	5,301	5,301	5,301		12,294	12,294	12,294	12,294	
Sales per sq m net (£)	11,892	13,585	13,585	13,585		3,322	4,145	4,577	5,053	
Sales from extg flrspace (£000)	63,039	72,015	72,015	72,015		40,845	50,966	56,270	62,127	
Available spending to support new shops (£000)	0	-9,474	-5,793	-2,490		0	127	841	1,065	
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0	
Net available spending for new shops (£000)	0	-9,474	-5,793	-2,490		0	127	841	1,065	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000		4,000	4,245	4,687	5,174	
Capacity for new shop flrspace (sq m net)	0	-790	-483	-208		0	30	179	206	
Market Share of Catchment Area Expenditure	6.5%	6.5%	6.5%	6.5%		3.0%	3.0%	3.0%	3.0%	

Sources:

Notes:

Scenario 1
Peartree Road

Table: **32**
CONVENIENCE GOODS MARKET SHARES IN **2020**

2020			
Peartree Road			
Zones	Main Food	Top-up convenience	WEIGHTED AVERAGE
	Q1	Q3	
	Expenditure weighting		
	70 (%)	30 (%)	100 (%)
1	0.4	3.7	1.4
2	0.0	0.0	0.0
3	2.1	7.0	3.6
4	0.0	0.0	0.0
5	0.0	0.0	0.0
6	0.0	0.0	0.0
7	0.0	0.0	0.0
8	0.6	0.0	0.4
9	0.0	0.0	0.0

Sources: Household Interview Survey 2016.
 Expenditure weighting by CPW Planning.

Table: **33**
COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN **2020**

2020 Allocations to Peartree Road									
Indicated by Household Interview Survey									
Zones	Clothing & footwear	Furniture/ floorcrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	WEIGHTED AVERAGE
	Q4	Q5	Q6	Q7	Q8	Q9	Q10	Q11	
	Expenditure weighting								
	490 (%)	147 (%)	103 (%)	131 (%)	231 (%)	187 (%)	502 (%)	856 (%)	2,648 (%)
1	0.0	6.2	0.0	0.0	0.0	2.2	0.3	0.0	0.6
2	0.0	0.0	1.2	1.2	0.0	0.0	0.0	0.0	0.1
3	0.0	2.5	1.1	0.0	0.0	0.7	0.0	0.0	0.2
4	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	3.4	0.0	0.0	0.0	0.0	0.0	0.1
6	0.0	4.5	1.2	0.0	0.0	0.0	0.0	0.0	0.3
7	0.0	3.2	3.2	0.0	0.0	0.0	0.0	0.0	0.3
8	0.0	1.8	0.0	0.0	0.0	1.6	0.0	0.0	0.2
9	0.0	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1

Sources: Household Interview Survey 2016.
 Table 4 for expenditure weights.

Table:

34

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario:	1	Location:	Peartree Road							
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.										
Market shares correction factors:		Convenience Goods:					120		% of survey indicated figures	
		Comparison Goods:					500		% of survey indicated figures	
Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2020 (%)	2023 (%)	2028 (%)	2033 (%)	BLANK COLUMN (%)	2020 (%)	2023 (%)	2028 (%)	2033 (%)	BLANK COLUMN (%)
1	2	2	2	2		3	3	3	3	
2	0	0	0	0		1	1	1	1	
3	4	4	4	4		1	1	1	1	
4	0	0	0	0		0	0	0	0	
5	0	0	0	0		1	1	1	1	
6	0	0	0	0		1	1	1	1	
7	0	0	0	0		2	2	2	2	
8	1	1	1	1		1	1	1	1	
9	0	0	0	0		0	0	0	0	

Sources: CPW Planning for market share corrections.

Table: 37

**SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

2020

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Co-Op (Fiveways Retail Park)	1,470	85	1,250	8,400	10,496
ALL STORES	1,470		1,250	8,400	10,496

Sources: Retail and Town Centre Study 2016. CPW Planning.

Table: 38

SALES CAPACITY OF EXISTING COMPARISON GOODS FLOORSPACE

Store	Gross Flrspace (sq m)	Net Flrspace (sq m)	Sales Density (£per sqm net)	2016 Sales (£000)
Net to gross ratio: 90 % (unless otherwise indicated)				
Comparison Goods Floorspace in stores & warehouses:				
Poundstretcher	1,110	999	2,189	2,187
Barnado's	390	351	n/a	120
Mattressman	360	324	2,040	661
Hatfields of Colchester	2,370	2,133	1,855	3,957
Hatfields Budget Clearance	2,110	1,899	1,440	2,735
Topps Tiles	600	540	1,211	654
It's Bed Time	630	567	2,040	1,157
Other comparison goods stores (The Stanway Centre and Angora Business Park)	4,020	3,618	2,000	7,236
Comparison Goods Floorspace in main foodstores:				
Co-Op (Fiveways Retail Park)	n/a	221	8,000	1,764
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns				
		10,652	1,922	20,470

Sources: Retail and Town Centre Study 2016. CPW Planning.

Notes: Where no sales density is indicated (n/a), sales are based on average sales per outlet.

Table: 39

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

2020

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: **40**
FORECAST RETAIL CAPACITY

Scenario:	1		Location:		Peartree Road				
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.									
Growth in sales per sq m from shop floorspace existing in		2020		Comparison Goods:		2.00 % pa		2020 to 2033	
	CONVENIENCE GOODS					COMPARISON GOODS			
	2020	2023	2028	2033	BLANK COLUMN	2020	2023	2028	2033
Residents' Spending £000	10,282	10,201	10,801	11,340		19,150	23,955	26,777	29,627
Plus visitors' spending (%)	-	-	-	-		-	-	-	-
Total spending (£000)	10,282	10,201	10,801	11,340		19,150	23,955	26,777	29,627
Existing shop floorspace (sq m net)	1,250	1,250	1,250	1,250		10,652	10,652	10,652	10,652
Sales per sq m net (£)	8,229	8,400	8,400	8,400		1,798	2,208	2,437	2,691
Sales from extg flrspace (£000)	10,282	10,496	10,496	10,496		19,150	23,513	25,960	28,662
Available spending to support new shops (£000)	0	-295	306	844		0	442	816	965
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0
Net available spending for new shops (£000)	0	-295	306	844		0	442	816	965
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000		4,000	4,245	4,687	5,174
Capacity for new shop flrspace (sq m net)	0	-25	25	70		0	104	174	186
Market Share of Catchment Area Expenditure	1.1%	1.1%	1.1%	1.1%		1.4%	1.4%	1.4%	1.4%

Sources:

Notes:

Table:

43

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario:	1	Location:	Highwoods							
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.										
Market shares correction factors:		Convenience Goods:			75% of survey indicated figures					
		Comparison Goods:			110% of survey indicated figures					
Catchment Zone	CONVENIENCE GOODS					COMPARISON GOODS				
	2020 (%)	2023 (%)	2028 (%)	2033 (%)	BLANK COLUMN (%)	2020 (%)	2023 (%)	2028 (%)	2033 (%)	BLANK COLUMN (%)
1	13	13	13	13		3	3	3	3	
2	5	5	5	5		1	1	1	1	
3	7	7	7	7		2	2	2	2	
4	0	0	0	0		0	0	0	0	
5	1	1	1	1		0	0	0	0	
6	1	1	1	1		0	0	0	0	
7	0	0	0	0		0	0	0	0	
8	1	1	1	1		0	0	0	0	
9	0	0	0	0		0	0	0	0	

Sources: CPW Planning for market share corrections.

Table: 46

SALES CAPACITY OF EXISTING**MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN****2020**

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Tesco Extra (Highwoods Square)	6,241	70	4,369	10,700	46,745
ALL STORES	6,241		4,369	10,700	46,745

Sources: Retail and Town Centre Study 2016. CPW Planning.

Table: 47

SALES CAPACITY OF EXISTING COMPARISON GOODS FLOORSPACE

Store	Gross Flrspace (sq m)	Net Flrspace (sq m)	Sales Density (£per sqm net)	2016 Sales (£000)
Net to gross ratio: 90 % (unless otherwise indicated)				
Comparison Goods Floorspace in main foodstore:				
Tesco Extra (Highwoods Square)	n/a	1,872	9,000	16,851
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns		1,872	9,000	16,851

Sources: Retail and Town Centre Study 2016. CPW Planning.

Notes:

Table: 48

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS**2020**

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: **49**
FORECAST RETAIL CAPACITY

Scenario:	1		Location:		Highwoods					
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.										
Growth in sales per sq m from shop floorspace existing in		2020		Comparison Goods:		2.00 % pa		2020 to 2033		
	CONVENIENCE GOODS					COMPARISON GOODS				
	2020	2023	2028	2033	BLANK COLUMN	2020	2023	2028	2033	BLANK COLUMN
Residents' Spending £000	48,266	47,886	50,705	53,234		15,207	19,020	21,261	23,525	
Plus visitors' spending (%)	-	-	-	-		-	-	-	-	
Total spending (£000)	48,266	47,886	50,705	53,234		15,207	19,020	21,261	23,525	
Existing shop floorspace (sq m net)	4,369	4,369	4,369	4,369		1,872	1,872	1,872	1,872	
Sales per sq m net (£)	11,048	10,700	10,700	10,700		8,122	10,338	11,414	12,602	
Sales from extg flrspace (£000)	48,266	46,745	46,745	46,745		15,207	19,356	21,371	23,595	
Available spending to support new shops (£000)	0	1,141	3,960	6,489		0	-336	-110	-70	
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0	
Net available spending for new shops (£000)	0	1,141	3,960	6,489		0	-336	-110	-70	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000		9,000	9,551	10,545	11,642	
Capacity for new shop flrspace (sq m net)	0	95	330	541		0	-35	-10	-6	
Market Share of Catchment Area Expenditure	5.0%	5.0%	5.0%	5.0%		1.1%	1.1%	1.1%	1.1%	

Sources:

Notes:

Table: 52
MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario:	1	Location:	Tiptree							
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.										
Market shares correction factors:		Convenience Goods:			160% of survey indicated figures					
		Comparison Goods:			95% of survey indicated figures					
Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2020 (%)	2023 (%)	2028 (%)	2033 (%)	BLANK COLUMN (%)	2020 (%)	2023 (%)	2028 (%)	2033 (%)	BLANK COLUMN (%)
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	3	3	3	3		0	0	0	0	
4	0	0	0	0		0	0	0	0	
5	0	0	0	0		0	0	0	0	
6	36	36	36	36		7	7	7	7	
7	0	0	0	0		0	0	0	0	
8	0	0	0	0		0	0	0	0	
9	3	3	3	3		3	3	3	3	

Sources: CPW Planning for market share corrections.

Table: 53
COMPARISON GOODS SALES BY GOODS TYPE IN 2020

Catchment Zones	2020 Sales in Tiptree							
	By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/ floorvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	0	213	0	0	0	254	160	0
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	160	0
6	0	161	0	430	244	662	4,073	1,356
7	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0
9	0	66	0	440	683	77	453	1,510
TOTALS	0	441	0	870	927	993	4,846	2,866
MARKET SHARES	0.0%	0.6%	0.0%	1.3%	0.8%	1.0%	1.9%	0.7%

Table: 54
FORECAST RETAIL SALES

Scenario:	1		Location: Tiptree							
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.										
Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2020 (£000)	2023 (£000)	2028 (£000)	2033 (£000)	BLANK COLUMN (£000)	2020 (£000)	2023 (£000)	2028 (£000)	2033 (£000)	BLANK COLUMN (£000)
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	2,651	2,630	2,785	2,924		0	0	0	0	
4	0	0	0	0		0	0	0	0	
5	0	0	0	0		0	0	0	0	
6	26,285	26,082	27,617	28,995		7,358	9,200	10,283	11,377	
7	0	0	0	0		0	0	0	0	
8	0	0	0	0		0	0	0	0	
9	2,468	2,448	2,592	2,721		3,430	4,292	4,797	5,307	
TOTALS	31,403	31,160	32,994	34,639		10,788	13,492	15,080	16,685	

Table: 55

**SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

2020

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Tesco (Church Road)	1,697	90	1,527	10,700	16,342
Asda (Church Road)	1,115	90	1,004	14,600	14,651
Iceland (The Centre)	416	98	408	7,219	2,943
Other convenience goods shops and stores	252	85	214	5,000	1,071
ALL STORES	3,480		3,153	11,104	35,007

Sources: Retail and Town Centre Study 2016. Experian Goad. CPW Planning.

Table: 56

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

2020

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: 57
FORECAST RETAIL CAPACITY

Scenario:	1		Location:		Tiptree					
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.										
Growth in sales per sq m from shop floorspace existing in				2020		Comparison Goods: 2.00 % pa		2020 to		2033
	CONVENIENCE GOODS					COMPARISON GOODS				
	2020	2023	2028	2033	BLANK COLUMN	2020	2023	2028	2033	BLANK COLUMN
Residents' Spending £000	31,403	31,160	32,994	34,639		10,788	13,492	15,080	16,685	
Plus visitors' spending (%)	-	-	-	-		-	-	-	-	
Total spending (£000)	31,403	31,160	32,994	34,639		10,788	13,492	15,080	16,685	
Existing shop floorspace (sq m net)	3,153	3,153	3,153	3,153		2,516	2,516	2,516	2,516	
Sales per sq m net (£)	9,961	11,104	11,104	11,104		4,288	4,550	5,024	5,546	
Sales from extg flrspace (£000)	31,403	35,007	35,007	35,007		10,788	11,448	12,640	13,955	
Available spending to support new shops (£000)	0	-3,848	-2,014	-368		0	2,044	2,440	2,729	
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0	
Net available spending for new shops (£000)	0	-3,848	-2,014	-368		0	2,044	2,440	2,729	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000		4,000	4,245	4,687	5,174	
Capacity for new shop flrspace (sq m net)	0	-321	-168	-31		0	481	521	527	
Market Share of Catchment Area Expenditure	3.2%	3.2%	3.2%	3.2%		0.8%	0.8%	0.8%	0.8%	

Sources: Experian Goad for Comparison Goods (ground floor) floorspace.

Notes:

Table:

60

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario:	1	Location:	Non-central stores in Borough									
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.												
Market shares correction factors:		Convenience Goods:						110% of survey indicated figures				
		Comparison Goods:						115% of survey indicated figures				
Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED											
	CONVENIENCE GOODS					BLANK COLUMN (%)	COMPARISON GOODS					
	2020 (%)	2023 (%)	2028 (%)	2033 (%)	2020 (%)		2023 (%)	2028 (%)	2033 (%)	BLANK COLUMN (%)		
1	24	24	24	24		11	11	11	11			
2	5	5	5	5		4	4	4	4			
3	22	22	22	22		9	9	9	9			
4	1	1	1	1		1	1	1	1			
5	2	2	2	2		3	3	3	3			
6	7	7	7	7		5	5	5	5			
7	0	0	0	0		2	2	2	2			
8	0	0	0	0		1	1	1	1			
9	0	0	0	0		0	0	0	0			

Sources: CPW Planning for market share corrections.

Table: 63

SALES CAPACITY OF EXISTING

MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN

2020

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Waitrose (St Andrew's Avenue)	2,672	80	2,138	11,100	23,727
Aldi (Colne View Retail Park)	1,552	75	1,164	11,000	12,804
Aldi (London Road, Lexden)	1,305	75	979	11,000	10,766
Aldi (Magdalen Street)	1,614	75	1,211	11,000	13,316
Lidl (Gosbecks Road)	1,896	80	1,517	10,400	15,775
Lidl (Abbot's Road)	1,424	80	1,139	10,400	11,848
Other (estimated) convenience goods shops and stores	500	85	425	5,000	2,125
ALL STORES	10,963		8,572	10,542	90,361

Sources: Retail and Town Centre Study 2016. CPW Planning.

Table: 64

SALES CAPACITY OF EXISTING COMPARISON GOODS FLOORSPACE

Store	Gross Flrspace (sq m)	Net Flrspace (sq m)	Sales Density (£per sqm net)	2016 Sales (£000)
Net to gross ratio: 90 % (unless otherwise indicated)				
Comparison Goods Floorspace in stores & warehouses:				
DFS (Colne View Retail Park)	1,940	1,746	5,309	9,270
Halfords (Colne View Retail Park) [1]	1,140	616	3,430	2,112
Pets At Home (Colne View Retail Park)	800	720	2,671	1,923
The Range (Cowdray Avenue)	2,630	2,367	n/a	7,138
Wickes (Clarendon Way Retail Park) [2]	2,590	1,632	n/a	3,049
Matalan (Colchester Retail Park, Sheepen Road)	2,940	2,646	2,136	5,652
Choice Home Outlet (Colchester Retail Park, Sheepen Road) [3]	980	882	2,400	2,117
Shoe Zone (Colchester Retail Park, Sheepen Road) [3]	390	351	2,700	948
Poundland (Colchester Retail Park, Sheepen Road)	470	423	4,849	2,051
B&Q Extra (Lightship Way) [4]	9,508	6,418	1,758	11,283
Aldi (Colne View Retail Park) comparison goods [3]		388	8,000	3,104
Aldi (London Road, Lexden) comparison goods [3]		326	8,000	2,610
Aldi (Magdalen Street) comparison goods [3]		404	8,000	3,228
Lidl (Gosbecks Road) comparison goods [3]		379	8,000	3,034
Lidl (Abbot's Road) comparison goods [3]		285	8,000	2,278
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns		19,582	3,054	59,795
TOTALS excluding B&Q Extra (expected to close / be replaced by Sainsbury's)		13,164	3,685	48,513

Sources: Retail and Town Centre Study 2016. CPW Planning.

Notes:

- (1) 1,026 sq m net sales but 40% excluded as non-retail (i.e. motor parts and accessories) sales.
- (2) 2,331 sq m net sales but 30% excluded for trade / non-retail sales.
- (3) Estimated sales density.
- (4) 8,557 sq m net sales but 25% excluded for trade / non-retail sales.

Where no sales density is indicated (n/a), sales are based on average sales per outlet.

Table: 65

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

2020

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
Lidl, Former Homebase, St Andrew's Avenue, Colchester (planning application ref. 183130)	1,479	80	1,183	10,400	12,305
Sainsbury's, assumed to replace B&Q Extra, Lightship Way (planning application ref. 143715)	6,831	54	3,689	10,900	40,207
ALL STORES	8,310		4,872		52,513
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Sainsbury's, assumed to replace B&Q Extra, Lightship Way (planning application ref. 143715)	n/a	n/a	3,142	8,300	26,079
ALL STORES AND SCHEMES	-		3,142		26,079

Sources: Retail and Town Centre Study 2016. Colchester Borough Council. CPW Planning.

Notes:

Table: **66**
FORECAST RETAIL CAPACITY

Scenario:	1		Location: Non-central stores in Borough								
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.											
Growth in sales per sq m from shop floorspace existing in		2020				Comparison Goods:		2.00 % pa		2020 to 2033	
	CONVENIENCE GOODS					COMPARISON GOODS					
	2020	2023	2028	2033	BLANK COLUMN	2020	2023	2028	2033	BLANK COLUMN	
Residents' Spending £000	96,942	96,180	101,841	106,921		71,430	89,350	99,875	110,507		
Plus visitors' spending (%)	-	-	-	-		-	-	-	-		
Total spending (£000)	96,942	96,180	101,841	106,921		71,430	89,350	99,875	110,507		
Existing shop floorspace (sq m net)	8,572	8,572	8,572	8,572		19,582	13,164	13,164	13,164		
Sales per sq m net (£)	11,309	10,542	10,542	10,542		3,648	4,233	4,674	5,160		
Sales from extg flrspace (£000)	96,942	90,361	90,361	90,361		71,430	55,726	61,526	67,929		
Available spending to support new shops (£000)	0	5,819	11,481	16,561		0	33,624	38,349	42,578		
Less sales capacity of committed new floorspace (£000)	0	52,513	52,513	52,513		0	27,675	30,555	33,735		
Net available spending for new shops (£000)	0	-46,694	-41,032	-35,952		0	5,950	7,794	8,842		
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000		4,000	4,245	4,687	5,174		
Capacity for new shop flrspace (sq m net)	0	-3,891	-3,419	-2,996		0	1,402	1,663	1,709		
Market Share of Catchment Area Expenditure	10.0%	10.0%	10.0%	10.0%		5.3%	5.3%	5.3%	5.3%		

Sources:

Notes:

Appendix C (Catchment Area Plan)

