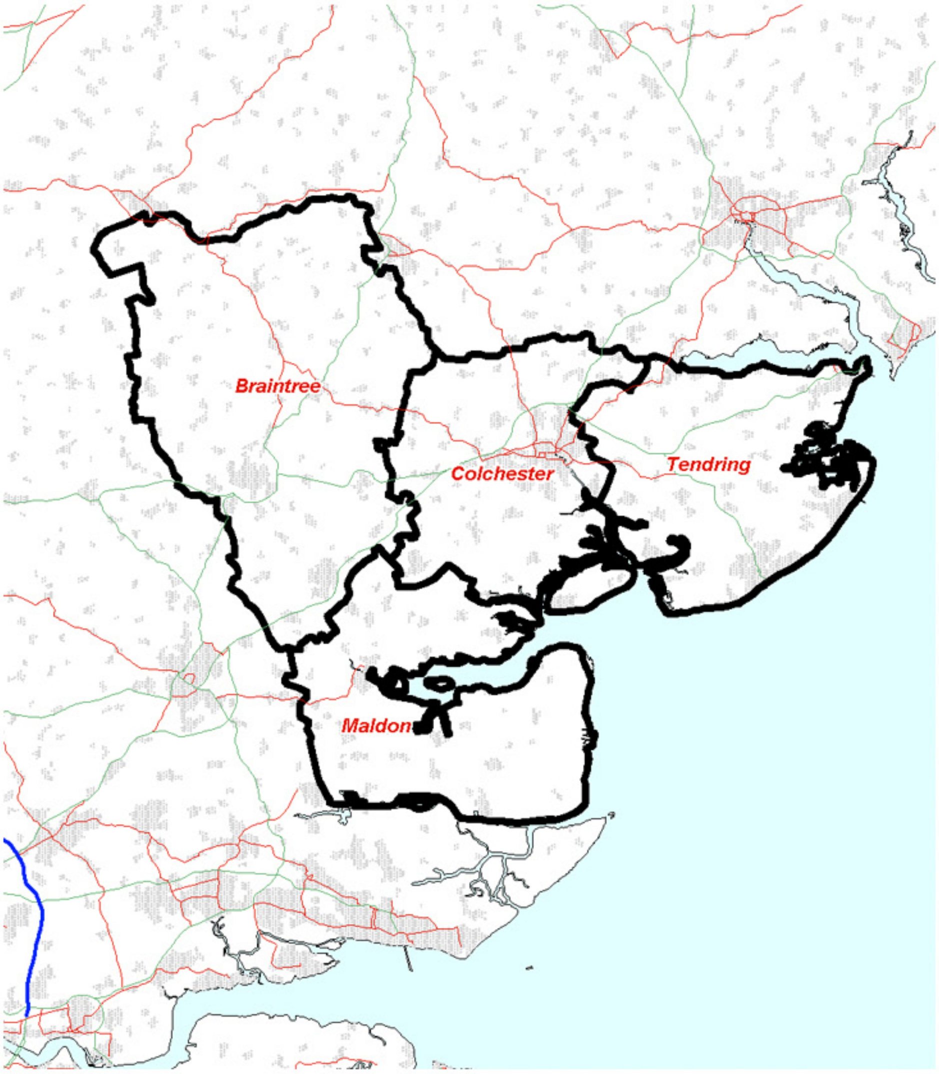
The North Essex Authorities Retail Study

Stage 1 Report: Strategic Overview



www.gvagrimley.co.uk

Reference: P:/Planning/643/Projects/02A5B5104

Contact: Chris Goddard / Caroline Cusa

Tel: (020) 7911 2202 / (020) 7911 2551

Email: chris.goddard@gvagrimley.co.uk / caroline.cusa@gvagrimley.co.uk

www.gvagrimley.co.uk

+44 (0) 870 900 89 90

Signed For & On Behalf Of

GVA GRIMLEY

………………………………

CHRIS GODDARD

Date………………………………

CONTENTS

PAGE NO.

PLANS

APPENDICES

1. INTRODUCTION

1.1 GVA Grimley was instructed by the North Essex Authorities (NEAS) (Braintree, Colchester, Maldon and Tendring) in August 2005 to undertake the North Essex Retail Study. The joint study is driven by a recognition of significant cross border and sub-regional issues, and consequently aims to address the interrelationship between the centres and the dynamics of the changing network of centres within the sub-region. The North Essex Study Area is illustrated on Plan 1.

1.2 The purpose of this study is to inform and guide town centre/retail planning in North Essex, and in particular, to input into the preparation of each authority's forthcoming Local Development Framework (LDF). Based on our research, analysis and overall findings, the study identifies a strategy for the future scale and form of new development and the distribution of growth, advising on the role of each centre within the retail hierarchy and any potential for change.

TERMS OF REFERENCE

1.3 Our terms of reference are to:

- Examine the retail hierarchy in North Essex and the wider sub-region, and advise on the role of each centre and their relationship to each other in the retail hierarchy;
- Establish the extent to which current retail and leisure provision within North Essex satisfies the level and nature of consumer demand within each catchment;
- Estimate the scale and nature of any changes in this position that may arrive in the light of:
  - Potential increases in population;
  - Forecast changes in retail expenditure;
  - Changing forms of retail provision;
  - Possible increases or decreases in the trade draw from competing centres.
- Identify the scale and nature of additional retail provision that may be appropriate in North Essex to the period 2011 and 2016;
- Assess the scope for new retail and leisure development and the potential to accommodate this within the sub-region.

TWO STAGE APPROACH

1.4 In accordance with our proposal for consultancy, we have formulated a two stage report structure. Stage 1 is a strategic report focusing on the full study area and sets out the common elements to each NEA, the baseline position and recommended strategy for growth and change in North Essex. It has been produced as a consistent source of reference for each of the NEAS to enable informed development control decisions and policy formulation, guiding change and growth across the sub-region. It focuses on the network of centres, current market conditions, qualitative health checks, global capacity forecasting, local development opportunity sites throughout the centres, strategic growth opportunities, and advice on any changes to the network of centres.

1.5 Stage 2 comprises an individual report for each local authority, developing the findings in Stage 1 further. Each report (four in total) focuses on localised issues and sets out the detailed technical analysis and recommendations for each authority. Work elements include a review of the local policy framework, an analysis of in-centre and household telephone surveys, detailed qualitative health checks, a review of the performance of existing retail/leisure floorspace, and quantitative capacity projections for each local authority. Each element of work draws on extensive in-centre and household telephone surveys.

1.6 This report forms Stage 1 of the overall study.

STRUCTURE OF THE REPORT

1.7 This report draws together the results of this process, incorporating the findings of details survey based analysis technical analysis, and ongoing discussions with the steering group. The report is structured as follows:

- In Section 2 we summarise the national policy framework which provides the policy context for the study. We review the Regional Spatial Strategy, and summarise the key components of each authorities local policy framework, including the current retail hierarchy definitions.
- In Section 3, we consider the current market context, and in particular the economic and social trends which are likely to influence the evolution of the North Essex sub-region.
- In Section 4, we set out the regional context; the factors which we have taken into account in determining the wider study area, and the context created by the role of other competing centres beyond the study area.
- In Section 5, we discuss the North Essex retail hierarchy in more detail, setting out the role of each centre within each authority and summarising their retail/leisure composition and the function they play.

- In Section 6, we set out our baseline economic capacity projections for the North Essex study area, focusing in particular on the capacity for further retail and commercial leisure provision within the study area, having regard to trendline population/expenditure growth assumptions.

- In Section 7, we set out our recommended strategy. We also highlight what we consider to be appropriate and consistent centre definitions based on PPS6.

1.8 This report is supported by a series of plans and appendices.

2. POLICY FRAMEWORK

NATIONAL POLICY CONTEXT

2.1 The Government has made it clear that the policies in PPS6 apply to the full range of town centre uses including retail, leisure, commercial and public offices, arts and tourism facilities, community facilities and housing as part of mixed-use multi-storey developments. The policies should be interpreted in the context of the Government's wider policy aims of promoting social inclusion, regenerating deprived areas, promoting economic growth, delivering more sustainable patterns of development and promoting good design, all of which are set out in PPS1.

2.2 PPS6 confirms that the Government's key objective is to promote vital and viable town centres by planning for their growth and focussing new development and a wide range of services within them. The Government's other objectives are to enhance consumer choice, support efficient, competitive and innovative retail and leisure sectors and to improve accessibility by a choice of means of transport.

2.3 The key points of relevance to the North Essex Study, are:-

- The need to take a more proactive approach to accommodating town centre uses in central locations, including where appropriate promotion of the expansion of town centres; and, conversely a realistic approach to the management of decline where justified; and

- The need to establish a hierarchy of centres in each region and sub-region, with any change in the role and function of centres to be secured as part of the preparation of regional spatial strategies (RSS) and through preparation of the development plans, rather than through individual applications.

2.4 Other more detailed points which are likely to be relevant to the North Essex study are:

- The need to assemble edge-of-centre sites for larger stores where need is identified, and to promote higher density, mixed-use multi-storey development;

- The need to encourage a wider range of services and land uses for centres in decline;

- the need to avoid over-concentration of growth in the highest level centres, and for regional spatial strategies to make clear strategic choices as to where growth is to be encouraged and decline managed;

- The need to assess the quantitative need for additional floorspace for retail, leisure and office uses over the plan period and for five year periods within it, and the capacity of existing centres to accommodate additional development (in the case of long term, strategic policy guidance, a longer term forecasting horizon is required);

- The need to improve public transport to existing out-of-centre facilities, but not as a justification for their extension;

- The need for development plans to set out the roles of different centres and explain how each centre will contribute to the local authority's overall vision for its area;

- The need for development plans to encourage a diversification of uses in the town centre as a whole and to promote positive management of the evening economy, perhaps identifying distinct quarters where the evening economy is to be concentrated;

- The need for development plans to include policies which guide the appropriate scale of development to be encouraged, setting upper limits for the scale of developments that will be allowed in different types of centres;

- the need for plans to positively allocate sufficient sites within and at the edge of town centres so as to meet anticipated demand for the next five years, anticipating the use of CPO powers where needed; and

- The need to promote a more balanced network of centres by strengthening local centres through preparation of local strategies to remedy deficiencies in local shopping.

REGIONAL POLICY CONTEXT

2.5 Regional policy for the North Essex sub-region is set out in the Draft Revision to the Regional Spatial Strategy for the East of England (RSS), December 2004. The RSS is currently (February 2006) the subject of an examination in public.

General Spatial Policies

2.6 Policy SS1 sets out how the Plan seeks to achieve sustainable development. The Spatial Strategy aims to achieve a sustainable relationship between jobs, homes and services at the strategic and local level. It requires a sequential approach to the location of major development as a core component of sustainable development. Conserving the regions environment, quality of life, local character and natural resources, whilst adapting to climate change, together with tackling the problems of social inclusion and deprivation are also key strands in achieving sustainable development.

2.7 Policy SS1 states that in most instances development will be focused in or adjacent to major urban areas where there is good public transport accessibility and where strategic networks (rail, road, bus) connect. Local development documents will first consider the re-use of land and buildings within urban areas and extensions to those areas, and finally other locations where there is good accessibility to public transport, or where proposed development can contribute to improving public transport access.

2.8 Policy SS2 sets out the overall approach to the spatial strategy. It states that in order to achieve a close correlation between homes, jobs and community facilities, urban areas will be the main focus for development and re-development in the region. The key centres of which development and change will be focused are (in alphabetical not priority order): Basildon, Bedford, Bury St Edmunds, Cambridge, Chelmsford, Colchester, Great Yarmouth, Harlow, Hemel Hempstead, Ipswich, Kings Lynn, Lowestoft, Luton/Dunstable, Norwich, Peterborough, Southend-on-Sea, Stansted/M11 Corridor towns (as set out in Stansted/M11 sub-regional strategy), Stevenage, Thurrock, Watford.

2.9 Policy SS2 states that local development documents will ensure a balanced and deliverable supply of land for employment, housing, and supporting services, by encouraging the change of use of land where alternative development would represent a more sustainable land use and allow for proposals that will make more efficient use of vacant and under used land and property.

2.10 Policy SS3 relates to development in and adjoining urban areas. The policy states that local development documents may make provision for development in or adjacent to urban areas where the scale and location of the release:

1. Will not adversely effect the need to make maximum use of previously developed land buildings and efforts to deliver sub-regional urban renaissance in accordance with the sequential approach and phase release of land, and

2. If greenfield, represents the most sustainable option by virtue of:

    - Existing access to good quality public transport, or where the development can assist new public transport provision.
    - Utilising existing physical and social infrastructure.
    - Having good access to housing, jobs, schools, shopping and leisure facilities.
    - Avoidance of adverse impact on environmental assets such as nature conservation and landscape character, historic features, mineral reserves, water resources and air quality.

2.11 Policy SS3 states that greenfield land releases should be appropriate in scale to the adjoining urban area. Significant urban extension should be large enough to provide a sustainable form of development, in relation to employment, public transport provision, and social, health, education and community facilities provision.

2.12 Policy SS5 relates to town centres and states that thriving, vibrant and attractive town centres are fundamental to the sustainable development of the East of England and it will continue to be the focus for investment, environmental enhancement and regeneration. Within the context of a community strategy approach, local development documents, supported by transport plans and economic and environmental and cultural strategies, will:

- Include a strategy for each town centre to promote successful mixed use economies, manage change, refocus where necessary and support cultural heritage.

- Protect and enhance existing neighbourhood centres and, where a need is established, promote new provision of an appropriate scale and function to meet local day to day needs.

- Ensure land is allocated to meet the full range of identified needs.

The Haven Gateway Sub-Region

2.13 The focus of the sub-region is the ports of Felixstowe, Harwich, Ipswich, and Mistley, and comprises Tendring District, the Boroughs of Colchester and Ipswich, much of Suffolk Coastal, Babergh and a small part of Mid Suffolk districts. Economic linkages within the policy area have grown organically based upon the principal port towns of Felixstowe, Harwich and Ipswich, together with the more diverse economies of Colchester and Ipswich. It is recognised, however, that the wider benefits of this growth are not evident throughout the sub-region, which contains areas in need of regeneration particularly along the north Essex coast and within the main towns.

2.14 The vision for the Haven Gateway is to deliver a high quality environment for its residents, workers and visitors, by capitalising on its location as a key gateway, realising its potential for significant sustainable growth, addressing its need for economic regeneration, creating an additional focus for growth of hi-tech, knowledge-based employment and protecting and enhancing its high quality, attractive natural assets.

2.15 Policy HG2 addresses the regeneration of under-performing parts of the sub-region. In particular, local development documents will promote major joint regeneration initiatives in East Colchester and St Botolph's, Ipswich Waterfront and Village; and new Government funded investment within Harwich/Clacton part of the priority area for regeneration to address unemployment and deprivation through neighbourhood management renewal.

Stansted/M11 Sub-Region

2.16 The Stansted/M11 sub-region is part of the wider London – Stansted – Cambridge – Peterborough Corridor area identified in the Sustainable Communities Plans. It is situated between the Greater

London boundary and the Cambridge sub-region boundary, and comprises the local authority areas of Epping Forest, Harlow, Uttlesford, Braintree, parts of East Hertfordshire and Broxbourne east of the A10.

2.17 The majority of policies for the sub-region relate specifically to development at Stansted and Harlow. However, Policy ST2 relates to employment generation and economic regeneration throughout the sub-region and requires that provision will be made in local development documents to accommodate up to 40,000 net additional jobs in the sub-region by 2021. Local development documents will identify additional large sites along with opportunities to expand existing sites and develop small and mixed use schemes.

2.18 Policy ST4 relates to strategic growth locations. It states that the sub-region will provide for a net increase of 35,050 new dwellings between 2001-2021 in excess of existing capacity commitments. Provision will be made within the settlement of Braintree for 1,200 dwellings between 2001-2021. It states that detailed proposals for development in these areas will be determined by local development documents or master planning studies.

Economic Development and Retail

2.19 Policy E9 sets out the regional structure of retail centre's, which are as follows:

- Major regional centres: Basildon, Cambridge, Colchester, Chelmsford, Ipswich, Norwich, Peterborough, Southend and Watford.
- Regional centres: Bedford, Bury St Edmunds, Great Yarmouth, Harlow, Hemel Hempstead, Kings Lynn, Lowestoft, Luton, St Albans, Stevenage and Welwyn Garden City.
- Other towns and market towns. Local development documents will define the towns and market towns which comprise the structure of main retail centres within their areas.
- Villages and local centres. Local development documents will define the villages and local centres that complete the structure of retail provision within their areas.

2.20 In accordance with the regional structure in Policy E9, Policy E10 states that:

- New retail development will be located in existing centres and will be consistent in scale with the size and character of the centre and its role within the regional structure.
- Local development documents will propose a higher order provision only where a need is clearly established it will result in a more sustainable pattern of development and movement, including a reduction in the need to travel; there would be no significant detrimental impact on other centres or the transport network; and there is environmental capacity. Any new regional

centres will be subject to similar considerations, and will be brought forward only as part of their review of this RSS.

- In the Sustainable Communities Plan growth areas, local development documents will propose development of retail and services in new and existing centres in accordance with sub-regional strategies and policies.

- Local development documents will consider the role of retail within priority areas for regeneration and propose development and enhancement to implement regeneration strategies.

2.21 The supporting text states that research undertaken within the region did not identify any need for major change to the retail structure to meet existing need. However, where there is significant growth within the region's Sustainable Community Plan, growth areas and priority areas for regeneration and retail growth will be essential to meet new needs.

2.22 The RSS encourages all local development documents to address retail needs and present an analysis of their area designed to produce a coherent retail strategy in relation to their existing town centres, edge-of-town centre and out-of-town centre retail sites, and e-tailing growth. These strategies should be prepared from robust data and analysis and make provision for new retail development whilst ensuring the viability and vitality of existing centres.

2.23 Policy E12 relates to out of town retail. It states that it is considered there is no need for any additional regional out of town shopping centres in the plan period. Local development documents will define the current and future of existing out of town centre retail sites in relation to existing town centres, in particular to determine whether:

- Out-of-town centre sites should remain purely retail centres.

- They should be developed into town centres with a full range of service provision.

2.24 The policy states that out-of-town centres will only be developed into town centres where they will:

- Improve social, environmental and economic sustainability.

- Deliver improved sustainable transport accessibility, particularly to improve public transport access.

ESSEX AND SOUTHEND-ON-SEA REPLACEMENT STRUCTURE PLAN APRIL 2001

2.25 On the 1st April 2001 Essex County Council and Southend-on-Sea Borough Council adopted the Replacement Structure Plan. The Structure Plan is a strategic plan which outlines guidance on new housing, employment land, town centres and retailing, transport improvements, and conserving the environment. The adopted Plan covers the plan-period 1996-2011.

2.26 Chapter 11 sets out strategic planning policies for town centres and retailing. It includes policies concerning the hierarchy of urban centres, town centre vitality and viability, the location of uses which are suitable for town centres, and covers all activities in, or appropriate to town centres, some of which are additionally covered by considerations in other chapters of the Plan. The objectives of the Plan in respect of this topic are:

- To promote the vitality of existing town centres as the main focus for new retail, leisure, entertainment, cultural and other investment through the sequential approach, diversity of activity and an attractive environment;

- To encourage access to and within shopping areas by alternative modes of transport to the private car.

2.27 It is recognised that Essex and Southend have a wide range of shopping centres providing different levels of service, each with a catchment area which may be overlapped or totally contained by that of another centre. Many centres provide facilities and services for a catchment area wider than their local area and therefore have strategic significance. In addition, major centres outside the plan area have an impact on retailing patterns within it, particular Ipswich and Cambridge and the major out of town regional shopping centres at Lakeside in Thurrock and Bluewater Park in Kent. The influence of these competing centres is discussed further in Section 4.

2.28 In terms of the retail hierarchy, the largest town centres in the plan area are the five 'sub-regional centres' of Basildon, Chelmsford, Colchester, Harlow and Southend. These are described as having an extensive catchment area and provide a range of specialist shopping in comparison goods and a wide choice of retail outlet. They also offer a wide range of service trades, entertainment and recreational facilities; and are significant employment centres, particularly for large-scale office development. Colchester is included in the North Essex Study Area.

2.29 In addition to the sub-regional centres, there are 21 other Principal Town Centres in Essex and Southend, each serving either a main town with its surrounding hinterland, or a substantial part of a major urban area. They are described as being generally main convenience shopping centres but also contain a good range of comparison goods shops as well as service trades, public and community facilities. It is acknowledged that in recent years, there has been very little new shopping development within these principal town centres. Within the North Essex Study Area, Braintree, Frinton, Halstead, Harwich, Maldon, and Witham are designated as Principal Town Centres.

LOCAL POLICY CONTEXT

2.30 We comment on the general policies outlined in each of the NEAS adopted Local Plan's, touching on the retail hierarchy and the potential for new retail/leisure development within each authority. More detailed policy analysis is included within the Stage 2 reports.

Braintree District Adopted Local Plan, July 2005

2.31 Within the district's retail hierarchy, Braintree, Halstead and Witham are all defined as town centres, i.e. they occupy the same position within the network of centres. Policies deal specifically with the sequential approach; tests for new retail development; acceptable uses in town centres; the definition of shopping areas and retail frontages. Further issues addressed include accessibility, use of upper floors in town centres, shopfronts and the acceptability of retail warehousing.

2.32 The Plan states that in Braintree, land immediately to the north of the Factory Outlet Centre could be considered for further non-food retail development in the plan period. Within the town centre, Market Place, Great Square, the western end of Manor Street and the northern end of Fairfield Road are proposed for environmental improvement. The Policy states that proposals which would prejudice these improvements, will not be permitted.

2.33 In Halstead, land east of Halstead High Street is identified as a comprehensive development area, where refurbishment or redevelopment will be encouraged for retail, office, residential purposes or a mix of these uses. A number of areas are allocated for environmental improvements including Bridge Street, Weavers Court, High Street, The Centre and Market Hill. In Witham, areas including Newland Street, Newlands Drive Car Park and the Lockrams Lane Car Park are proposed for environmental improvement. Newlands precinct is identified as a comprehensive development area on the Proposals Map, where refurbishment, or redevelopment will be encouraged, for retail purposes.

Colchester Borough Adopted Local Plan, 2004

2.34 The adopted Local Plan states that the overall strategy for the future planning of Colchester Town Centre is to maintain the pivotal role of the Town Centre as a major economic centre and the social and cultural focus for the Borough. The Plan aims to safeguard its predominantly retailing core whilst at the same time allowing for a variety of complementary facilities and services compatible with its historic character and overall environment. Elsewhere in the Borough, Tiptree, West Mersea and Wivenhoe are designated as 'Rural District Centres' because, in the light of the geography of the Borough, they serve larger catchment areas, even though their general function is of a local nature.

2.35 Policies within the adopted Plan deal specifically with the location of new retail development; frontage policies and changes of use; mixed use designations; the protection of local centres; and leisure; entertainment, food and drink. Policy TCS2 identifies capacity for a further 13,600 sq m of comparison goods floorspace by 2006, and a further 15,200 sq m by 2011. The Queen Street Regeneration Area is allocated for this purpose in the Plan.

2.36 No sites for new major foodstores are allocated, but Policy TCS3 sets out the criteria for assessing new proposals. Smaller stores that primarily serve local walk-in catchment areas will be permitted in the Garrison Regeneration Area and elsewhere where they are widely accessible to the local catchment population and would not prejudice the vitality and viability of a defined shopping centre.

The policy states that proposals to increase the amount of floorspace in existing major foodstores in edge and out-of-centre locations to be used for comparison goods, or for such facilities as post offices, pharmacies and dry-cleaning establishments are of particular concern and will need special justification.

2.37 Chapter 20 deals specifically with Tiptree town centre, acknowledging that the centre faces considerable change over the next few years and major housing development occurring (circa 400 additional units). The Plan aims to improve the attractiveness of the main shopping area, in particular through the implementation of a traffic calming scheme and the provision of additional car and cycle parking facilities. Policy TIP1 states that any proposal for development within the boundaries of the Tiptree Central Area Enhancement Scheme should encourage new services and facilities, support the existing facilities and improve the general appearance of Church Road.

Maldon District Local Plan, November 2005

2.38 Retailing is identified as the most important commercial sector in terms of employment in the District, providing circa 1,500 jobs. The main shopping centres are the principal town centre of Maldon, the smaller town centre of Burnham-on-Crouch and the district centre of Heybridge. Policies aim to protect core retail areas; control development outside core retail areas; protect the Maldon market; protect village shops and services; and manage retail use on farms.

2.39 The adaptation and modernisation of shopping facilities to meet new retail demands is acknowledged as being an important element in maintaining the viability of town centres. The Plan recognises, however, that there is limited scope for development in Maldon or Burnham-on-Crouch town centres because of their historic nature, access requirements, the limited opportunities to expand public car parking and their capacity to absorb additional traffic generation.

2.40 Development opportunities include 'Quest Motors, High Street/Butt Lane, Maldon', 'Transco Site, Victoria Road, Maldon', 'Orth's Garage, White Horse Lane, Maldon', and 'Former Houlding's Garage Site, Heybridge'. The sites that are capable of being re-developed are shown on the Proposals Map, and are being promoted to extend the shopping provision in the District and their development in Maldon and Burnham. These sites are discussed further in Section 8.

Tendring District Replacement Local Plan, April 1998

2.41 Retailing is recognised as being an important component of the District's economy, and the maintenance of existing town and other retail centres and new investment in retail facilities are also important complementary parts of the Plan's regeneration objectives. Previous Retail Study's identified a need for further non-bulky retail floorspace and a small amount of food shopping floorspace across the District. Since this time, the Brook Park site has been developed comprising bulky non-food floorspace and a new foodstore. The Plan states there is no need to identify a further out of centre site for non-food goods, or a large foodstore.

2.42 In terms of the retail hierarchy, Clacton-on-Sea is defined as a major town centre, and Dovercourt, Harwich, Frinton-on-Sea, Walton-on-the-Naze, Brightlingsea and Manningtree are defined as town centres. The Plan states that all options in town centres should be thoroughly assessed before edge of centre locations and out of centre sites are considered for town centre uses. Policies within the Plan control the development of town centre uses, retail uses in the countryside and small convenience stores outside of centre, and protect primary shopping frontages.

2.43 Chapter 8 deals specifically with Clacton-on-Sea, the main centre of employment for the District. It is evident that tourism remains a vital part of the Clacton economy, although changing holiday trends have led to a decline in long stay holidays but an increase in short breaks and day visits. The Plan recognises that there is scope to achieve more efficient use of floorspace by the extension and alteration of the existing building stock. Within the town centre, new retail and mixed-use development will be encouraged on the following sites:

- Pavilion Garage site at the corner of Pallister Road and Colne Road;
- Land to the rear of the foodstore in Colne Road;
- Land between High Street and Rosemary Road; and
- NCP car park, Jackson Road (retail at ground floor with offices above and multi-storey car park).

2.44 Land north of the Waterglade Centre is also allocated for mixed-use comprising non-food bulky comparison retail goods and leisure activities. Further policies allocate a specialist shop/café area as allocated on the proposals map, and seek to control food and drink uses in Pier Avenue South. Policy CL12 relates to the Factory Outlet Centre, and states that permission will not be granted for proposals that include the introduction of unrestricted retail use on the Clacton Factory Shopping Village, and any application for its extension will have to comply with the sequential test.

2.45 The Haven Gateway partnership, which is promoting opportunities in the sub-region, has identified Harwich as one area requiring regeneration. Policy HAR4A states that proposals for new development in the Harwich Conservation Area and Urban Regeneration Area will be considered against the relevant provisions of the Harwich Master Plan, which identifies certain areas and individual sites for new development.

2.46 Recent studies undertaken for the Council have concluded that Dovercourt town centre is in a poor state of health. As such, Policy HAR12 states that within the defined regeneration area, covering parts of the town centre, appropriate mixed-use development will be encouraged in order to bring about the repair and restoration of historic buildings. Policy HAR13 encourages environmental improvements, and Policy HAR14 proposes the relocation of the market.

2.47 Chapter 10 deals specifically with Frinton-on-Sea and Walton-on-the-Naze. The retail strategy for Frinton is to consolidate the retail core within Connaught Avenue, where there is also a number of infill development opportunities. Walton town centre is in a poorer state of health compared with Clacton and Frinton, and the retail strategy is to retain a clear shopping presence in the High Street and to continue to support the market in its current location. Other policies aim to protect and enhance Brightlingsea and Manningtree town centres.

NORTH ESSEX RETAIL HIERARCHY – CURRENT POLICY POSITION

2.48 Table 2.1 below sets out the centres which have been considered as part of this assessment. The location of the centres are illustrated on Plan 1. It is evident that definitions of centres are not consistent across North Essex. They do not relate to PPS6 definitions and cannot be compared in the context of North Essex. We discuss this, and recommendations for consistency, in later sections.

Table 2.1: The North Essex Centres: Current Retail Hierarchy

Local Planning Authority	Centre	Designation within Current Local Policy
Colchester Borough Council	Colchester	Sub-Regional Centre
	Tiptree	Rural District Centre
	West Mersea	Rural District Centre
	Wivenhoe	Rural District Centre
Braintree District Council	Braintree	Town Centre
	Halstead	Town Centre
	Witham	Town Centre
Maldon District Council	Maldon	Principal Town Centre
	Burnham-on-Crouch	Smaller Town Centre
	Heybridge	District Shopping Centre
Tendring District Council	Clacton-on-Sea	Major Town Centre
	Brightlingsea	Town Centre
	Dovercourt	Town Centre
	Frinton-on-Sea	Town Centre
	Harwich	Town Centre
	Manningtree	Town Centre
	Walton-on-the-Naze	Town Centre

SUMMARY

2.49 In the light of the Government's recent Policy Statement on Town Centres (PPS6) the NEA's development plans should anticipate a requirement for a more proactive approach to the expansion of their main centres, improvements to the range of services offered in smaller centres and if appropriate, managed decline and change in any centres which can no longer realistically hold their place in the retail hierarchy. PPS6 requires the NEA's to establish a hierarchy of centres through preparation of their development plans, rather than through individual applications.

2.50 The East of England Plan focuses on general development principles at the strategic scale, and does not comment specifically on the role of the smaller centres in North Essex. The document sets out a number of centres in the region where development and change will be focused; Colchester is the only centre in North Essex included within this spatial policy. Within the retail hierarchy, Colchester is defined as a Major Regional Centre, but the RSS points towards local development documents to define other towns, villages and local centres.

2.51 Within the RSS, Tendring and Colchester are both included within the Haven Gateway Sub-Region, which focuses on regenerating under-performing parts of the sub-region. Braintree falls within the Stansted\M11 Sub-Region, where employment generation and economic regeneration is encouraged through the preparation of local development documents. In general, the RSS encourages all local development documents to produce a coherent strategy in relation to their network of town centres and out-of-centre retail floorspace, underpinned by robust data and analysis.

2.52 In the Adopted Replacement Structure Plan, Colchester is defined as a Sub-Regional Centre, and Braintree, Frinton, Halstead, Maldon, Harwich and Witham are defined as Principal Town Centres.

2.53 Each of the NEA's set out their town centre/retail policies within each respective local plan, focusing on the local retail hierarchy, specific policies to control development, and highlighting any development opportunity sites. The purpose of this study is to revisit and update this policy position, to develop a revised strategy underpinned by robust data and analysis, as recommended in the RSS.

3. CURRENT MARKET CONTEXT

3.1 To develop a strategy for the North Essex sub-region, it is relevant to consider the wider economic and social trends likely to influence retailing and leisure uses over the forthcoming LDF periods. A number of trends are likely to have a bearing on the future pattern of retail provision in North Essex, and the opportunities arising from development proposals. This section examines national and regional trends and changing local market conditions to provide an insight into the current and future opportunities, challenges and threats facing North Essex.

i) Income and Expenditure

3.2 The retail sector has seen significant changes over the last 25 years, which have fundamentally altered the way we shop. One of the main drivers behind change has been the growth in incomes and expenditure. Consumer retail expenditure per head over the last 25-30 years has grown at an average compound rate of about 3% per annum in real terms, but most of this growth has been in comparison goods, with little increase in convenience goods expenditure.

3.3 Over the last 25-30 years comparison goods expenditure per head has shown growth of nearly 5% per annum in real terms, i.e. an overall increase of over 200% in real terms over the last 25 years. In contrast, convenience goods expenditure per head has increased at less than 1% per annum in real terms. Over the last 15-20 years even stronger growth has occurred, particularly in recent years. Such very strong expenditure growth trends are unlikely to continue, but reasonably strong growth in line with long term trends appears probable over the medium-long term.

3.4 Strong income and expenditure trends have also affected retailing in another important way – the rise in car ownership and mobility. Over the last 25 years the number of households owning one or more cars has increased from about 55% to about 75%. Equally significant, the number of households with two or more cars has nearly trebled from 11% to 30%. Households are now much more mobile than they used to be and therefore their choices for shopping centres to visit and the distances they can travel are much greater.

ii) Out-of-Town Retailing

3.5 Over the past 10 years, out-of-town has been the engine of retail growth. While retail sales as a whole increased by 62.1%, sale of out-of-town (OOT) stores grew nearly twice as fast, at 118%. OOT retail parks have provided retailers with larger, lower cost units than in town centre locations and they have used this opportunity to broaden their product offer and drive down prices. It has been a winning formula not just for grocers' superstores and bulky goods retailers but also, if carefully applied, for a growing number of high street retailers.

3.6 In 2003, sales of OOT retail parks grew by 5.5%, the lowest rate ever. While this still significantly outstrips total retail expenditure of 3.7%, it is a significant decline from the 6.2% of 2002. In its brief history, OOT sales growth has always been driven by physical expansion but an increasingly hard line taken by local authorities as they seek to interpret government policy has cut the number of new parks approved. Planning refusals have become common and this has caused a cutback in new store expansion plans. In 2003 space grew by only 4.4% - the lowest growth rate on record. As a consequence, many OOT retailers are becoming more innovative in store design, in-store merchandising and, in many cases, customer service.

3.7 Verdict expect OOT retail sales to grow by an average of 5.2% per year over the next five years, a slowdown from 6.7% per year over 1998-2003 as a shortage of new sites and cost increases force retailers to place greater emphasis on improving same store sales, which they expect to increase from 1.4% to 2.4% per year. While lobbying by retailers has been successful in watering down some of the most restrictive elements of the government's original proposals, the latest planning policy statement is still strongly in favour of consolidating retail activity in town centres whenever possible. This will mean that while OOT growth slows down, sales growth in in-town locations will strengthen over the next five years and space will grow slightly on account of major urban renewal schemes.

3.8 Nevertheless, Verdict expect OOT retail sales to experience an overall growth of 28.9% over the next five years, considerably faster than retail spending as a whole. It is, however, a slower rate than OOT achieved over the past five years because the difficulty of obtaining planning consents will limit new development. Conversely in-town sales will show a faster rate of increase over the forecast period as town centre renewal projects contribute to more robust growth.

3.9 In terms of individual sectors, DIY has been one of the fastest growing OOT sectors, although there is evidence that this growth is slowing down. Clothing and footwear will be a fast growing OOT sector as retailers take up more units on shopping parks to take advantage of more spacious accommodation. General merchandise retailers will also grow strongly (35.4% over the next five years), in particular Argos. This trend is reflected on a number of retail warehouse parks where a number of clothing and general merchandising retailers, including Next, Boots, Gap, Borders, Peacocks and Carphone Warehouse, are becoming increasingly common. Electrical retailers are expected to grow by 35.3% driven by demand for new technologies such as LCD TVs and recordable DVDs.

3.10 According to Verdict, Grocers' OOT sales will grow more slowly than other sectors but it will remain the largest sector accounting for 65.5% of all OOT sales. This rate of growth is much faster than the 15.4% growth expected in spending on food due to the increasing quantity of space at grocers' large OOT stores devoted to non-food products – where demand is growing more strongly.

iii) Town Centre/High Street Retailing

3.11 Despite the growth of OOT retailing, high street retailers (including those in shopping centres) clocked up sales of £122.7 billion in 2003 or 49.1% of the money spent by consumers on retail. The High Street's share of all retail spending is only fractionally down on its 50.8% share of 10 years ago.

While OOT sales have grown strongly and online retailing is also now taking a growing share of the market, it is convenience goods retailers located in the neighbourhood that have born the brunt of this migration of shoppers and not the high street.

3.12 Deflation has become a major issue for retailers on the high street. In 1993-98, high street retailers experienced average annual inflation selling prices of 2.4%, but over the last five years there has been deflation of 0.7%. Several factors have contributed to deflation, including aggressive price competition from OOT retailers creating a growing price differential with their high street rivals. But OOT competition is not the only explanation; on the high street itself, new low cost retail models such as Primark, Savers and Wilkinson are able to challenge established retailers like M&S, Boots and Woolworths.

3.13 The High Street has become a high cost location. A shortage of units in prime locations has put upward pressure on already high rents, employment, insurance and distribution/servicing costs are rising, as are tax burdens for retailers signing new leases. Despite these difficulties many high street retailers are thriving. The thrivers (Argos, Debenhams, HMV, John Lewis and Next) have managed to grow sales by 62.8% or £4.2 billion over the last five years, while the strugglers (Bhs, Boots, Dixons, House of Fraser and M&S) have only achieved a 12% or £1.5 billion uplift in sales. The most important ingredient for reinforcing margins appears to be a distinctive product offer.

3.14 Perhaps the most encouraging indicator of the long term health of the high street is the strong pipeline of new developments over the next five years. As planning consent for OOT sites has become harder to gain, developers have switched their attention back to the city centre. Though 2004 was a relatively quiet year for development after the boom of 2003, there is a strong pipeline of new centres for 2005-2008. Many of these schemes have taken years to receive approval and will provide much needed revitalisation of town and city retail infrastructure, enabling people across the country to benefit from a much richer retail mix.

iv) Number of Shop Units

3.15 National retail trends indicate a continuing contraction in the number of shop units. Total store numbers in the UK have declined by 11% over the last 10 years. This masks variations in the decline of different types of stores and different locations. With the emergence and growth of superstores during the 1990s, there has been a decline in the number of smaller and more specialist food retailers. The number of food specialists has declined by 19% from 48,301 in 1992 to 39,131 in 2002. Whereas the number of large superstores has increased by 50% from 860 in 1992 to 1,292 in 2002.

3.16 During 1992-2002 leading supermarket multiples increased their share of the grocery market, as a result of the success of the superstore format. Superstores grew their market share from 30% in 1992 to just over 40% in 2002.

3.17 Certain specialists have suffered more than others. The fishmongers share of the total grocery market has declined from 0.5% in 1992 to 0.1% in 2002. Butchers have also lost nearly 2% of their market share, declining from 4.1% to 2.2%. Greengrocers, bakers and other specialists have been slightly more robust, yet all three have lost market share. While local neighbourhood centres will retain a more localised 'top up' role, many are likely to decline irrespective of new development proposals.

v) Retail Polarisation

3.18 The last few years have seen a sustained fall in the pipeline OOT shopping centre and retail park development. A corresponding resurgence in activity has been mainly concentrated into a few large schemes in dominant regional centres. The top 70 centres in the country now attract over 50% of the country's population for comparison goods shopping. Almost half of the shopping centre floorspace in the pipeline is destined for these same 70 centres which will further reinforce their dominant market share.

3.19 The growth of multiple traders and increased competition between traders has meant that the retail structure is increasingly dominated by large companies. In tandem with this change has been the desire by multiple traders to occupy larger shop units. Shopping centres which have been able to accommodate this demand for larger sized units (typically 500-2,000 sq m or larger in the largest centres) have grown in importance reinforcing the trend of higher order centres growing in relative importance, i.e. polarisation in the retail hierarchy. The growth in car ownership and mobility, coupled with increased affluence, has led to shoppers travelling greater distances to shop in larger centres with a strong retail offer.

3.20 This concentration of retailing in larger centres, is likely to threaten smaller towns unless they are able to secure new development of sufficient scale and quality to retain expenditure in the District, generate new inflows and attract key retailers.

vi) The Internet and Non Store Trading

3.21 Home shopping (mail order and internet shopping) is the main component of non-store retailing. In total, non-store retailing amounts to about 7% of comparison goods expenditure. Mail order has a long history, and whilst it has suffered to some extent from the rise of the internet, it has evolved and new retailers have entered the market and expanded, such as Next and Marks & Spencer and more recently John Lewis. GUS bought Argos and Homebase and Littlewoods bought Index. These retailers expect home shopping to play an increasing, but supplementary, role to traditional store based shopping.

3.22 The growth of e-tailing has been phenomenal over the last few years, but from a very small base. Growth rates of 70% per annum were not unusual two years ago, but growth has now come down to about 30% per annum, but this is still a very strong growth rate compared to bricks and mortar retailing. It is estimated that about 5% of retail expenditure is now conducted on the internet, although most foodstore operators have closed their virtual stores or warehouses and operate home deliveries out of existing stores. Books, games, DVD'S/video's and CD's along with finance, insurance and travel services have been the most affected, but small electrical goods, computer hardware and software, white goods, toys and gifts, and some clothing and footwear could see internet sales take an increasing share of retail spending.

3.23 It is possible that retail warehouses could suffer proportionately more than town centres, due to the types of goods sold in them, but all centres will be affected to a greater or lesser extent depending on the type of goods they sell and the function they perform. Where town centres adapt, and become more leisure orientated, and retailers increasingly use their shops as showrooms running web sites in parallel, conventional retailing should continue to prosper, but price competition and low inflation/deflation looks likely to be a permanent state of affairs.

3.24 In the convenience sector it is considered that internet shopping is unlikely to have a significant effect in the future. Although Verdict predict that growth will be fuelled by the increasing savviness of consumers and ordering is speeded up by broadband, overall they forecast that this will not have a significant effect on sales. Verdict predict that on-line grocery sales will increase from £1.4bn in 2001 to £5.3bn by 2007, this will still however only make up 4% of all grocers and food specialist sales.

vii) Convenience Retailers

3.25 The leading foodstore operators are continuing to innovate to increase their market share. Some have developed smaller store formats such as Tesco Metro and Sainsbury's Local and have been more innovative in their town centre proposals. Discount retailers continue to seek opportunities to expand their networks. There has also been a growth in 'forecourt' retailing, operated either by the large supermarket chains or the major oil companies. These are likely to present opportunities for local neighbourhood convenience facilities serving new and existing communities in the District.

3.26 In the past five years supermarket multiples have strengthened their hold on the UK grocery market, taking share from most other operators in the process. Independent and smaller chains of grocers and convenience stores have been the key losers and acquisition targets, with 2003 share of the market a mere third of the level in 1998. All food specialists have come under pressure while off-licences have suffered heavily from the growing 'beer, wine and spirits' offer of both major grocers and convenience stores.

3.27 The growing share of the supermarket multiples has primarily been driven by the performance of four players – Tesco, Asda, Morrisons and the Co-op, which between them have put 9.8% on their combined market shares over this period. These players have emerged as the leading sales winners among UK grocers, while the rest of the market has typically struggled. At a national level the pressure for larger superstores and hypermarkets will continue, although any further proposals for expansion of existing out-of-centre convenience stores must be considered in terms of need, sequential approach and impact.

viii) Convergence of Retail and Leisure

3.28 Since the mid-1990's, despite higher rents, there has been a steady trend, driven by central government policy, towards building new leisure schemes in town/edge of centre locations. A number of factors have helped drive the growth of leisure venue provision in town and city centres. For example, urban living is back in fashion; town centres can offer consumers a much more vibrant atmosphere in which to eat and drink; and they also offer a much wider choice of leisure venues, allowing more spontaneous decisions. For bars, restaurants and health & fitness clubs, the attraction of the town centre is 'daytime trade', and the ability to capitalise on proximity to businesses and shoppers.

3.29 This change in location has also been combined with the inclusion of leisure complexes that incorporate both retail and leisure facilities. Leisure facilities can be used as a way of encouraging customers to stay longer and consequently spend more. The Trocadero in London's West End is an example of this, with mainstream retailers such as HMV, Whittards, Sock Shop and Accessorize taking advantage of the high pedestrian flows created by the major leisure attractions such as Funland, the UGC multiplex and Planet Hollywood. This is also the case in the Metro Centre, Gateshead where a large leisure centre has been incorporated into the retail complex. Mixed-use retail and leisure development has proved to be a real growth area in town centres.

THE NEXT FIVE YEARS

i) Retail Operating Influences

3.30 Retail deflationary price pressures are expected to intensify, due to the growth of the internet, competition amongst retailers, globalisation, the strong £ etc. This will force retailers to concentrate on supply chains, cut costs and be more efficient. This will favour the larger retailers who have stronger buying power and encourage take-overs to achieve improved economies of scale, i.e. the larger and stronger multiples will grow larger and stronger.

3.31 On-line sales will continue growing strongly, as broad band becomes cheaper and more widely used. Traditional catalogue mail order is likely to suffer most, not the high street. Verdict expect that on-line sales will increase 155% (20% pa) over the next five years (2004-2009), whereas total retail spending will increase by 21% (3.9% pa) and mail order spending will increase by 8.7% (1.7% pa). Verdict expect total retail sales to be £317.1 bn in 2009, of which £291.5 bn will be store based and £25.6 bn will be non-store based (on-line, mail order and TV shopping). Interestingly the on-line total is made up of £10.1 bn from bricks and mortar retailers, £3.1 bn from Pure Play internet retailers and £2.5 bn from mail order on-line sales.

ii) Social Influences

3.32 Verdict expect a continuation of present trends of longer working hours and the decline of the nuclear family, so affecting when spending occurs and on what. They expect further growth in convenience stores, located near where people live, and work and longer opening hours to cater for longer working hours.

3.33 Over the next five years the over 60's age group will grow by 13m or 14.5% and half of that growth will be in the 60-64 age group. The Under 60's age group will decline by 0.2m (or –0.5%). Older shoppers have a younger mindset than in the past, are more fashion aware and financially better off as a result of house price growth as well as income growth (but pensions will be a concern). They will have more time to shop, will spend more on DIY and gardening and will expect good customer service. Younger shoppers will have higher University fees to pay, will experience higher housing costs, will spend more on entertainment/leisure and so will have less to spend in the retail sector.

iii) Technological Influences

3.34 Verdict expect major changes that will affect the supply chain. RFID (radio frequency identification) is a microscopic electronic tag within each product that is set to replace the ageing bar code. This will enable retailers to identify individual articles rather than specific types of products and it does not require contact with a scanner as radio signals can be picked up within a range of about 20 feet. They can also be scanned very quickly and do not require individual scanning.

3.35 XML (Extensible Mark-up Language) will transmit information between computers and will affect the relationship between retailers and suppliers. This is an improvement over the currently used EDI (electronic data interchange) as computers running different software can communicate with each other. These new technologies will help reduce costs, enhance collaboration between retailers and suppliers, bring new products to the market quicker and improve efficiency.

LEISURE CHOICES

3.36 The range of leisure choice now on offer to the consumer has grown considerably within the last decade, leading to an increase in competition within the leisure industry (Table 3.1). It is evident that the pace of growth in the cinema and the health and fitness market has been notably faster than other sectors. According to Mintel's report on Health and Fitness Clubs – UK (May 2003), between 1998 and 2002 the value of the private health & fitness clubs market increased by 62% at current prices; in real terms the growth was still substantial at 49%.

Table 3.1: Comparison of spend on selected leisure activities, 1998-2003

	1998 £m	1999 £m	2000 £m	2001 £m	2002 £m	2003 (est) £m	% change 1998-2003
Bingo	1,019	1,041	1,076	1,118	1,164	1,205	+18.3
Cinemas	720	781	827	895	965	1,026	+42.5
Health & fitness*	1,084	1,226	1,434	1,667	1,753	1,848	+70.5
Nightclubs and discotheques**	2,156	1,975	1,830	1,804	1,767	1,727	-19.9
Tenpin bowling	201	206	219	233	245	258	+28.4
Theme parks	224	236	232	236	249	259	+15.6
Eating out***	20,029	21,116	22,230	23,246	24,436	25,092	+25.3

* Data relate only to private clubs and therefore exclude those clubs run on behalf of local authorities
** Corporate facilities are also excluded
*** Includes spend in fast food outlets, pub catering, restaurants and other catering, but excludes 'chameleon/hybrid' - type outlets

Source: Mintel

3.37 Between 1998 and 2003, Mintel estimates that the 'eating out' market grew by some 25%, largely due to convenience for consumers, an increase in disposable income and the social aspect of eating out. Mintel identifies that consumers are increasingly choosing to make life easier for themselves in order to offset the stress brought on by everyday life. Consumers are choosing to combine a number of activities in an evening, and as eating out has become less formal, it is now not necessarily the focus of the evening out but is considered as part of an overall experience, reinforcing the link between shopping, leisure activities and bars/restaurants.

3.38 Trading through pubs has grown slowly since 1998 despite buoyant economic conditions and, according to Mintel, the total number of licensed premises has remained fairly stagnant between 2000-2003. A significant amount of trade has been diverted to 'take-home' purchasing through supermarkets, shops and off licences, as well as cross Channel supplies. This has led to the major pub landlords innovating in order to attract customers back to their hostelries. Concepts include family pubs, and large 'superpubs' and sports bars in City Centres, all attracting a predominantly young clientele.

3.39 Technological developments have had a huge influence on the leisure industry and how we spend our leisure time, with consumers becoming increasingly comfortable with the technology in their homes. The increasing number of channels now available, encourage growth in viewing time. Emailing and surfing the Internet are considered leisure activities and online, gambling and other activities are becoming increasingly popular. Using this medium can become a time saver for other leisure activities, such as shopping, booking tickets for cinema, theatre or concerts, and booking holidays.

Emerging Markets

3.40 The role of 'Casinos' is forecast to represent one of the greatest changes in the leisure industry over the next few years. According to Mintel, visits to casinos over a two-year period (1999-2001) grew by 5%. Consequently the average spend per visit to an average casino had risen to £59 in 2001. There are, however, significant differences between the London and provincial casino markets, for instance, although the provincial market accounts for 81% of all casinos and 76% of all visits, it only accounts for 37% of the industry turnover. Nevertheless, stronger growth in more recent times has been seen in the provincial market, with the London market experiencing a small slow down.

3.41 The Government has recently introduced the new Gambling Act, which introduces far-reaching changes relating to casinos. Casinos will no longer have to operate as private clubs, and will also be able to offer live entertainment, advertise, offer betting and bingo as well as table games, and offer larger numbers of gaming machines linked to each other to offer potentially large joint jackpots. However, the number of new large and regional casinos has initially been restricted to 8 and 1 respectively, pending further consideration of their effects.

Locational Factors

3.42 Since the mid-1990s, despite higher rents, there has been a steady trend, driven by central government policy, towards building new leisure schemes in town/edge of centre locations. A number of factors have helped drive the growth of leisure venue provision in town and city centres.

3.43 In the larger UK cities, urban living is back in fashion; town centres can offer consumers a much more vibrant atmosphere in which to eat and drink; and they also offer a much wider choice of leisure venues, allowing more spontaneous decisions. For bars, restaurants and health & fitness clubs, the attraction of the town centre is 'daytime trade', and the ability to capitalise on proximity to businesses and shoppers.

3.44 This change in location has also been combined with the inclusion of leisure complexes that incorporate both retail and leisure facilities. Leisure facilities can be used as a way of encouraging customers to stay longer and consequently spend more and most major town centre development projects now combine retail and leisure, including eating and drinking, cinemas etc. However, the potential to secure new quality leisure/mixed use development depends on the attractiveness of the centre, accessibility, and the availability of opportunities for significant new development to act as a catalyst for change.

THE SERVICES SECTOR

3.45 Collectively, changes taking place in the convenience retail sector and services sector have profound implications for the future of traditional local centres and parades. Key services, notably pharmacies, post offices and banks/building societies are all undergoing structural change.

Pharmacies

3.46 The position of community pharmacies in local and town centres has been relatively protected and little change has occurred in numbers since 1987. The Office of Fair Trading's (OFT) Market Investigation Report attributes this to regulations which seek to control entry to the market. Currently the regulations only give pharmacist's dispensations to provide NHS prescriptions where they satisfy health authority requirements that their services are 'necessary or desirable' for a local area.

3.47 Despite the relatively small change in actual community pharmacy numbers, the dynamics of the market have changed. Since 1990 'Superdrug Ltd' has entered the market and other existing national pharmacy chains (i.e. Boots) and supermarkets have significantly increased their market share.

3.48 In January 2003, the OFT recommended to the Government that there should be a deregulation of pharmacies thereby allowing all registered pharmacies with qualified staff to be able to dispense NHS prescriptions. This could result in significantly more pharmacies in supermarkets, and thereby impact on traditional outlets. Research commissioned by Lloyds Pharmacy in January 2003 showed that, at present approximately 6,000 pharmacies across the country are located within the catchment area of two or more supermarkets and therefore they are potentially threatened. The New Economics Foundation consider these pharmacies to be at threat should deregulation occur.

Post Offices

3.49 Research by the New Economics Foundation indicates the importance of the local post office branch, for example as a focal point for social interaction, information about job and community services, financial transactions and advice. Services are especially valued by the disabled, those without a car, those over 65, carers and one-parent families. In urban deprived areas, post offices are also the main source of cash and in many cases double as the only store providing an important source of food and basic items for local people. The role of post offices in maintaining local economies is emphasised by the New Economics Foundation; once people have cash in their hands, they will more often choose to spend it in local shops.

3.50 Britain has one of the most extensive post office networks in Europe and 94% of people are within a mile of one of them. However, the New Economics Foundation reported in December 2002 that the number of post offices in the UK has been in steady decline of around 2-3% a year for the last ten years. In 1981, there were 22,000 post offices in Britain, by April 2001 this had fallen to 17,846. According to the Financial Times, Britain lost 547 post offices in 2001, 112 of which were in urban centres.

3.51 The automation of services (i.e. direct debit payment methods and banking transfers) has reduced handling fees, which Post Offices rely on for revenue; the lack of suitable replacement sub-postmasters/mistresses when they retire; and reductions in shoppers in local centres have all contributed to increasing the number of post office closures. The New Economics Foundation stated "that where the supermarkets draw away shoppers, the post office goes too. If one end of these businesses comes under threat, either the retail or the post office – the community risk losing both institutions for good" (New Economics Foundation, 2002, p20).

3.52 The government announced in December 2002 that grants of up to £50,000 will be given to urban post offices in some of the poorest areas to make them viable and prevent closure. However, the Post Office announced in February 2003 that 3,000 urban branches were to close under the urban reinvention programme over the next three years, therefore the trend is set to continue.

Banks/Building Societies

3.53 Barclays, Lloyds TSB, HSBC and RBS Natwest, known collectively as the 'Big Four', account for over two thirds of all private current accounts in Britain and have a virtual monopoly of (89%) over small business accounts (New Economics Foundation, 2002). Rationalisation by the 'Big Four' has contributed to many branch closures. Technological advances through the emergence of telephone and internet banking; competition from branchless banks; and the availability of banking services through post offices have also impacted upon bank and building society branch numbers.

3.54 During the 1990s the number of high street bank branches fell dramatically. Britain lost over a quarter of its branch network. Between 1988 and 2000 the number of bank branches fell from approximately 17,500 to 12,000, with more than 3,500 bank branches closing between 1995 and 2000. The British Bankers Association reported that more than 150 bank branches were closed in 2001. The Building Societies Yearbook reported that 200 Building Society branches disappeared from the high street between 2000 and 2002. Deloitte Research estimates that the termination programme will ultimately continue and a further 3,600 bank branches will close by 2005. (New Economic Foundation, 2002).

3.55 The combined effect of the rationalisation of pharmacies, Post Offices and banks/building societies will reinforce the polarisation of retail activity towards the network of key town/district centres. As a consequence, we expect to see further contraction in the size and function of a number of the smaller centres in North Essex.

SUMMARY

3.56 We have examined current market trends in the retail and leisure sectors, to examine the implications for the future pattern of development within North Essex.

3.57 Retailing, and in particular comparison retailing, underpins the function of most major centres and has seen sustained growth with renewed interest in town centre development reinforced by the current national policy context. However, the out of centre market has continued to gain market share at the expense of traditional high streets, and growth in new comparison based development is increasingly polarising towards major schemes in a smaller number of large centres.

3.58 Continuing structural changes in the convenience and services sector have particular implications for smaller town and district/local centres. As the main food superstore operators increase their market share and diversify into everyday non food goods and services, large food superstores increasingly define and underpin the network of town and district centres.

3.59 In the commercial leisure sector, changing social and demographic trends and increased personal disposable income will fuel sustained growth in mainstream commercial leisure activities, including cinemas, bars, restaurants and post deregulation, significant additional investment in the gambling and entertainment industry. As a consequence of market trends and policy, many main stream leisure activities, including the cinema, are increasingly returning to traditional town centre locations.

4. REGIONAL CONTEXT

4.1 This section examines the relationship of North Essex with the wider sub-region, and in particular the influence of key competing strategic centres on the current and future role of the North Essex centres. It draws extensively on the household telephone survey data which underpins the whole study.

THE STUDY AREA

4.2 In order to understand the operation of the North Essex centres and their interaction with the rest of the region, it is necessary to adopt a study area which extends beyond the defined North Essex sub-region comprising the NEAS.

4.3 In order to define an appropriate study area, we drew extensively on previous survey work undertaken to underpin the Structure Plan Review Town Centres Study (January 2002) and the Chelmsford Retail Study (GVA Grimley, January 2005). Further inputs included detailed consideration of each local authority boundary in relation to the existing retail hierarchy, the adjoining catchment population/urban areas, out of centre retail provision and competing centres in the wider catchment.

4.4 In discussion with the client group, a study area was defined for the purposes of commissioning the household survey. This area was further divided into sub zones as a means of measuring current shopping/leisure patterns within the study area as a whole and between the North Essex centres. Within this area a household telephone survey was carried out with a sample of 2,000 households, broken down into 20 Zones. The Survey Area and Zones identified are illustrated on Plan 2.

4.5 Table 4.1 ranks the principal centres within the wider sub-region by catchment population and floorspace. To put the figures into context, we have included Colchester, the largest centre within the North Essex study area. It is evident that the major centres in the region occupy a similar 'tier' of centre, with a comparable scale of retail floorspace and attraction of shoppers.

Table 4.1: Competing Centres, Sub-Regional Context (Sorted by Shopping Population Rank)

Centre	Shopping Population Rank Position	Floorspace Sq m Gross (Promis)
Cambridge	35	120,000
Ipswich	43	121,000
Colchester	49	96,000
Chelmsford	52	108,000
Basildon	73	107,000

Source: Promis, February 2006

4.6 Shopping patterns derived from the Household Telephone Survey enable us to calculate the amount of comparison goods expenditure that each competing centre draws from the defined North Essex survey area. As well as strength of retail offer, this indicator takes into consideration accessibility and distance from the North Essex catchment area. The amount of expenditure lost to these centres is highlighted in Table 4.2, and illustrated on Plan 3. We have identified the influence of competing strategic centres, based on this survey data, throughout the remainder of this section.

4.7 Chelmsford draws the highest proportion of trade (10.3%) from the study area, totalling £175m. Collectively, the key competing centres draw £405.9m from the study area, or 24% of total available comparison goods expenditure from within the North Essex survey area. Major town centres and retail warehousing in North Essex account for 54% of total available comparison goods expenditure. The remaining 22% is directed towards smaller local shopping facilities in North Essex and other town centres and out of centre retail provision beyond North Essex.

Table 4.2: Study Area Comparison Goods Trade Draw: Key Competing Strategic Centres

Centre	Comparison Goods Trade Draw from Catchment Area (£000)	% of Total Available Comparison Goods Expenditure (%)
Colchester	437.9	26.9
Chelmsford	175.9	10.3
Ipswich	55.4	3.3
Sudbury	49.1	2.9
Cambridge	33.7	2.0
Haverill	29.0	1.7
Bury St Edmonds	23.9	1.4
London	11.8	0.7
Bluewater	8.4	0.5
Basildon	5.8	0.3

Source: GVA Household Telephone Survey 2005

RANKING OF COMPETING CENTRES

4.8 We have examined each competing centre, focusing on its composition, influence on the North Essex catchment area (drawing on the household survey), retailer demand, and opportunities to strengthen their position and influence on North Essex in the future. This analysis highlights which centres are likely to compete more strongly with the North Essex centres, and influence their potential growth.

CAMBRIDGE

4.9 Cambridge is an historic University City of considerable character and acts as the administrative centre for Cambridgeshire. The M11 provides a direct route to London and the M25, while the A14 dual carriageway links the city with the Midlands and east coast port. Cambridge dominates an extensive catchment area, and whilst predominately rural, the catchment encompasses a large number of rural villages, as well as small towns such as Haverhill, Saffron Walden, Royston and the eastern part of Newmarket.

4.10 Cambridge draws approximately £33.7m of comparison goods expenditure from the North Essex survey area, which equates to circa 2.0% of total available comparison goods expenditure. The extent of influence across the survey area is relatively limited, drawing 24.1% of trade from Zone 1, but less than 3% from each of the remaining 19 Zones. The influence of Cambridge on the North Essex survey area is illustrated on Plan 4.

4.11 Cambridge has approximately 116,100 sq m gross of retail floorspace, with the historic core shopping area centred on Petty Cury, Lion Yard, Market Hill, Market Street, St Andrews Street and Sidney Street. There has been no substantial development undertaken in this area since the mid 1970's. The city boasts extensive upmarket and speciality shopping, as well as colleges, churches and other historic buildings which dominate the city centre. Retail provision extends across a large central area, with many key multiples situated some distance from the prime pitch. Many city centre units are not geared to meet the needs of modern retailers. Nevertheless, Cambridge has an excellent mass market retail offer as well as upmarket and speciality retailers scattered across the traditional city centre. Department store provision includes Debenhams and John Lewis.

4.12 Cambridge has two managed shopping centres. The Grafton Centre opened in 1983 and has a floorspace of approximately 40,000 sq m gross. The centre is anchored by Bhs and Debenhams, and a number of multiples here also trade from the traditional city centre, including Boots, New Look and Next. In contrast to the core area, up market provision in the Grafton Centre is limited, and the emphasis is on main stream fashion. There is also an 8 screen Warner Village multiplex cinema within the centre which was developed as part of an extension in the mid 1990's. Planning permission to extend the centre was granted in March 2003. The £10m extension added circa 2,800 sq m gross of retail floorspace split into 7 new units.

4.13 The Lion Yard Shopping Centre is located within the historic core and flanks the prime pitch. The enclosed shopping centre opened in 1974 and has a retail floorspace of circa 11,000 sq m gross. The units at Lion Yard are small and there is no major anchor; amongst the largest occupiers are Dixons, Game and HMV. Aberdeen Property Investors have permission for a 1,800 sq m extension to the centre however work is unlikely to start before the Grand Arcade development gets underway. The Lion Yard Shopping Centre will eventually be linked to the new Grand Arcade shopping development. Lion Yard has full planning permission for further refurbishment work on the centre. This will include a link to the Grand Arcade scheme and the construction of a small food court.

4.14 The retail offer in Cambridge will be further enhanced following proposed regeneration and development projects. Full planning permission has been granted for a major redevelopment of the area around the outmoded John Lewis department store on St Andrews Street, to create a new two level shopping centre – the Grand Arcade. The scheme will total around 42,000 sq m gross with the first phase being the construction of a new 26,000 sq m gross John Lewis store. The existing John Lewis store will then be redeveloped to create space for 50 unit shops and restaurants. The start date for the scheme was January 2005 with the new Robert Sayle store in St Andrews St opening in October 2007 and the Grand Arcade will open at the beginning of 2008.

4.15 Also on Burleigh Street, Grosvenor Developments are currently redeveloping the former Co-op Store to create 2,000 sq m gross of unit shops, together with offices and flats on the upper floors. John Lewis have moved into the redeveloped site on a temporary basis while the Grand Arcade scheme is being developed.

4.16 There is currently strong retailer demand to locate in Cambridge, and levels of demand have been consistently high since April 2000. In April 2000 Cambridge had 163 requirements ranking the centre 5, and in April 2005 requirements had risen to 201 and the rank position has increased to 3. It is unlikely that retailer demand to locate in Cambridge will decline over the next few years following the implementation of the Grand Arcade Shopping Centre development.

4.17 Retailers that have recently expressed interest at Cambridge include quality clothing multiples such as Reiss, L K Bennett, and Krisp. There is also a number of mid range multiples interested in Cambridge including, Zara, Men's Basewear, and The Officers Club. A large number of restaurants, coffee shops and bars have also expressed interest, including Bierodrome, Lomo and Santa Fe. Several large space users have requirements, most notably Ikea and House of Fraser Department Stores, as well as Peacocks, TJ Hughes and TK Maxx.

BASILDON

4.18 Basildon was one of the first New Towns in Britain. It is well connected to London and the M25 via the A127 to the north of the town and the A13 to the south. The A130 links Chelmsford to Norwich. Basildon has a compact catchment area, which extends southwards to the Thames Estuary and northwards, just beyond Billericay. It is however constrained to the west and east by Brentwood and Southend on Sea respectively and by Chelmsford to the north. The smaller centres of Wickford, Billericay, Stanford le Hope and South Benfleet are all located within the Basildon catchment. Basildon is located beyond the southern boundary of the defined North Essex study area.

4.19 Basildon draws only £5.8m of comparison goods expenditure from the North Essex survey area, which equates to 0.3% of total available comparison goods expenditure. The level of influence is tightly constrained with a 7.8% market share in Zone 20, 0.4% market share in Zone 18 and 19, and a 0.3% market share in Zone 11. The influence of Basildon on the North Essex study area is illustrated on Plan 5.

4.20 Basildon has approximately 106,800 sq m gross of retail floorspace, located within a purpose-built town centre, originally developed in 1958. The central area is contained within the ring road and is almost entirely pedestrianised. There is only one department store in the town, Allders, and the retail offer is predominantly mass market, with almost no specialist or up-market retailers. Key fashion retailers within the centre include Next, Top Shop/Top Man, Bay Trading, Republic, River Island, Etam, New Look and Mark One.

4.21 Basildon has two managed shopping centres. The Eastgate Shopping Centre is the main centre within Basildon. The centre opened in 1981 and has a total retail floorspace of approximately 55,000 sq m gross following an extension of 17,000 sq m in 1985. This scheme is anchored by Allders department store and a new Asda Superstore and accommodates most of Basildon's clothing/fashion multiples, including New Look, Next and Primark. Allders offers a good range of fashion concessions including Top Shop, Miss Selfridge, Pineapple, Oasis, Wallis, Principles, Windsmoor, Anne Harvey and Dash. The enclosed shopping centre has 5,000 parking spaces in an adjacent multi-storey car park.

4.22 Town Square, a wide open-air precinct, is the focus of the central area. Key retailers within this pitch include Marks & Spencer, Boots, WH Smith, Bhs and Dixons. Much of this area is now dated and run down in appearance.

4.23 The Westgate Shopping Park, a hybrid development, is situated to the west of the central area, providing several larger stores, ranging from just under 5,000 sq ft to around 30,000 sq ft and accommodating some key town centre retailers such as Argos, JD Sports and MVC. Whilst not strictly within the town centre boundary, the shopping park is immediately adjacent to the pedestrian access to Marks & Spencer and the prime shopping area. The shopping park opened in 1999 and has a retail floorspace of approximately 13,500 sq m gross.

4.24 Basildon's prime retail pitch is now situated along the main section of the ground floor mall of the Eastgate Centre, having shifted away from Town Square in recent years. Key tenants within the prime area include Bay Trading, Ann Summers, Next, HMV, New Look, Etam and Republic. In terms of convenience goods provision, the Savacentre has closed its large superstore in the Eastgate Centre and has been replaced by a new Asda foodstore which opened in Summer 2004. Iceland has a supermarket on Market Pavement and there is a food hall in Marks & Spencer.

4.25 We are aware of only one more retail scheme in the development pipeline for Basildon town centre. Outline consent was granted for a retail warehouse development on a car park site at Southernhay. The scheme developed in conjunction with Basildon Town Centre Management and Star Grace Developments, would comprise a total floorspace of 1,100 sq m gross, although to date the applicant has not submitted a reserved matters application.

4.26 The number of retailer requirements in Basildon has steadily increased since April 2001. In April 2001 Basildon had 45 requirements, but by April 2005 requirements had increased to 52. However whilst this might suggest that retailer demand is currently strong, the overall rank position during the same period has decreased from 129 in April 2001, to 146 in April 2005. Operators which have reported an interest in Basildon include D2, Eisenegger, The Perfume Shop, Stationery Box, and

Carphone Warehouse. It is evident from our analysis that there are few major fashion/clothing retailers looking for premises in Basildon town centre.

IPSWICH

4.27 Ipswich is the largest town in the predominantly rural county of Suffolk and acts as the county's main administrative centre. The town is located adjacent to the A12 dual carriageway, en route from London to the Norfolk coast. The A14, which intersects the A12 just south of Ipswich, has improved the town's connections with the Midlands. In addition, the town has good rail links to London.

4.28 Ipswich serves a predominantly rural primary catchment area, which extends over much of Suffolk. The catchment incorporates Mendlesham to the north-west, Chelmondiston to the south-east, Woodbridge to the west, and Hadleigh to the south-west. Colchester limits the southern extent of the catchment, and Felixstowe lies just outside the primary catchment area to the south east. Ipswich draws circa £55.4m of comparison goods expenditure from the North Essex survey area, equating to circa 3.3% of total available comparison goods expenditure. The influence of Ipswich on the North Essex study area is illustrated on Plan 6.

4.29 Ipswich has a below average proportion of managed floorspace with around 23% of the total retail floorspace accounted for by the town's two managed shopping centres. The largest and newest of the two centres, the Buttermarket Shopping Centre, opened in 1982 and is accessed via the secondary pitch of Buttermarket. The centre has suffered from an unstable tenant mix since opening. It was originally anchored by C & A and an Owen Owen department store. Allders, which closed in March 2005 subsequently took the Owen Owen store, and C & A moved out of the scheme in 2000. Several vacant units at the entrance to the scheme were reconfigured to provide a new store for Bhs, which opened in 1997. In 1999, ten units on the upper floor were combined to provide a large store for TK Maxx.

4.30 The older and smaller Tower Ramparts shopping centre is accessed via Tavern Street, part of the town's prime pitch. Completed in the mid-1980s, the centre underwent modest refurbishment in the early 1990s. Tower Ramparts is anchored by Littlewoods, which incorporates an Index catalogue shop; other occupiers include Bay Trading, Boots, Top Shop, Warehouse and the Post Office. Until early 2000 Ipswich had a third shopping centre, the small 1960s Eastgate Centre. The centre was situated in an off-pitch location on the northern side of Carr Street but was redeveloped to create two large units, occupied by Peacocks and QD Stores.

4.31 The prime pitch in Ipswich town centre extends eastwards from Marks and Spencer on Westgate Street into Tavern Street, just beyond the entrance to Tower Ramparts. The prime stretch of Tavern Street accommodates several national multiples, including The Body Shop, Dixons and HMV. The prime stretch of Westgate Street accommodates some of the larger stores in Ipswich including Debenhams, Gap, Marks and Spencer, and W H Smith. Debenhams houses a range of concessions, from mainstream fashion retailers to more up-market retailers such as Windsmoor, Eastex and Jacques Vert.

4.32 The main secondary pitches in Ipswich town centre include Buttermarket, Carr Street and Upper Brook Street. Buttermarket parallels Tavern Street to the south; occupiers here include multiples such as Edinburgh Woollen Mill, Past Times, Lakeland and Laura Ashley and services such as travel and estate agents. Carr Street forms a continuation of Tavern Street to the east; this secondary street houses a mix of fairly down-market retailers, including Argos and Woolworths. The Co-op Department Store is situated at the eastern end of Carr Street. Upper Brook Street runs southwards from the junction of Tavern Street and Carr Street. Retailers here are predominantly local/independent traders, though Wilkinsons and J Sainsbury have stores at the southern end of this pitch. Most of the main shopping streets in Ipswich, including Tavern Street, Westgate Street, Buttermarket and Carr Street are either pedestrianised or partially pedestrianised.

4.33 Current planning objectives aim to protect and enhance the status of Ipswich as a shopping centre through the consolidation of town centre provision. Work undertaken for the local authority suggests a need for around 44,592 sq m of additional shopping floorspace within the town centre between 2006 and 2016, in order to maintain the centres market share.

4.34 The most significant scheme in the pipeline for Ipswich town centre is a major retail and leisure development on the eastern edge of the shopping area; the site is currently in use as a car park. NCP and Helical Retail have been preparing a planning application for around 29,728 sq m of retail floorspace and 9,011 sq m of leisure. The development, to be called the Mint Quarter, would comprise an open `street-scape' development with entrances from Upper Brook Street, Carr Street and Tacket Street. The proposed scheme is set to contain three large anchor stores and a further twenty standard sized units.

4.35 Ipswich has over the past five years, experienced an increasing number of retailer requirements. In April 2001, the number of requirements stood at 65, with a rank of 74, however by April 2005, requirements had increased to 106, whilst the rank improved 25 places to 49. Retailers that have recently expressed an interest in locating in Ipswich include a number of specialist retailers such as The Pier, Blacks, Lush, Robert Dyas and Bang & Olufsen, as well as fashion/clothing multiples such as Base, Zara, Free Spirit, Republic, Moda in Pelle, Cotton Traders, Fat Face, Krisp, Quiksilver and USC. TJ Hughes also has a reported requirement for Ipswich.

CHELMSFORD

4.36 Chelmsford, which stands at the confluence of two rivers, The Chelmer and The Can, is an historic town centre which serves as the principal shopping centre for mid-Essex. The centre is situated close to the A12 dual carriageway, linking Essex to the M25 and Greater London, and leading to Colchester and Ipswich to the north, and is well served by mainline rail services.

4.37 Chelmsford draws circa £175.9m of comparison goods expenditure from the North Essex survey area. This is the highest trade draw from a competing centre beyond the NEAS, equating to 10.3% of total available comparison goods expenditure. Given the close vicinity of Chelmsford to the North Essex survey area, the centre has a strong market share in Zone 12 (15.8%), 13 (37%), 14 (43%), 18 (40%), 19 (54%) and 20 (38%). The influence of Chelmsford on the North Essex study area is illustrated on Plan 7.

4.38 The main shopping area is compact and largely pedestrianised, with High Street providing the main 'spine route'. The pedestrianisation and upgrade of High Street was completed in 1993/94 at a cost of £1.5m. The town has two managed shopping centres, The High Chelmer and The Meadows, located to the north-west and south east of High Street respectively. A number of major multiple retailers are located in the shopping centres and supplement retail provision on High Street.

4.39 Chelmsford's prime pitch runs along High Street from the 'island' of Lloyds TSB bank situated at the northern end to the entrance to The Meadows at the southern end. Key retailers within this prime area include Debenhams, Marks & Spencer, Woolworths, WH Smith and Next. WH Smith and H&M benefit from entrances on High Street and New London Road. High Street acts as the main access route between the High Chelmer Shopping Centre and the Meadows Shopping Centre and has a strong pedestrian footfall. There is currently only one vacant unit in the prime retail pitch.

4.40 The High Chelmer Shopping Centre opened in 1970 and has a retail floorspace of approximately 23,700 sq m gross on one level (82 units). The centre can be accessed from Tindal Street, Market Road, New London Road and High Street, and offers a mix of national multiples and smaller independent retailers anchored by JJB Sports. The centre currently has very few vacant units, reflecting the demand from retailers for space in Chelmsford town centre, although the number of vacant units has fluctuated in the past. However, despite recent and ongoing refurbishment/extension of units, the centre appears dated and units are poorly configured to cater for current national multiple requirements. The covered market and multi-storey car park (780 spaces) adjoin the shopping centre to the west.

4.41 The Meadows Shopping Centre opened in 1992 and has a retail floorspace of approximately 14,900 sq m gross located on one level within 40 units. The centre is bound by High Street to the west, The River Chelmer to the east, The River Can to the South and Springfield Road to the north, and can be accessed via High Street, Meadow Walk and Backnang Square. An eight screen Odeon Cinema, which opened in 1993, and multi-storey car park are within the ownership boundary of The Meadows, but are located on the opposite side of the River Can, with a direct footbridge linking with the shopping centre.

4.42 The Meadows is anchored by Bhs, Boots the Chemist, Waterstone's and Wilkinson and is fully let providing no additional space for new retailers. The centre is more modern in appearance compared to the High Chelmer shopping centre, but is smaller in size with constrained site boundaries. The

Meadows links directly with the waterfront and café/restaurant area, which has the potential for significant improvement to add to the vitality, vibrancy and footfall within this part of the town centre.

4.43 Chelmsford town centre has a number of more secondary retail areas. The stretch of the High Street north of the prime retail pitch is mainly occupied by financial and professional services, including Barclays, Natwest, Bradford & Bingley, HSBC, Lloyds TSB and Abbey National, but is anchored by some national multiple comparison goods retailers including Gap, Superdrug and Linens Direct.

4.44 The main shopping area in Chelmsford town centre is compact and largely pedestrianised with High Street providing the main 'spine route'. The High Street provides a high quality, safe and pleasant environment to shop in. Street paving is of a consistently high standard throughout High Street and Springfield Road, and appears to be well maintained and supplemented with high quality street furniture in the form of benches, litter bins, trees and street lighting. Hanging baskets and flowers throughout the core shopping area adds to the environment and suggests continued ongoing investment to maintain the quality of the environment.

4.45 In terms of new proposals and commitments, consent has been granted to redevelop the bus station and depot site to the north of the town centre. The site of approximately 0.85 ha comprises the bus station and depot, temporary office accommodation, part of Council owned car parks and part of Fairfield Road. It is flanked by Duke Street to the north and Viaduct Road to the east and, in part, by Fairfield Road to the West. The open forecourt of the bus station and Viaduct Road are within the West End Conservation Area.

4.46 The scheme involves the redevelopment of the site to provide a new bus interchange with commercial and residential development to the rear. It will comprise 1,607 sq m of A1/A3 floorspace on the ground floor; 170 residential apartments within three storeys above the ground floor uses; a new public square; and 134 residential car parking spaces within five floors of split level car parking.

4.47 In addition, in April 2003, outline planning consent was granted for the redevelopment of Anglia Polytechnic University, to the north west of Chelmsford town centre. The application site of approximately 4.05 ha comprises the area occupied by the APU Central Campus Buildings, Park Road, the Council's green space north of Parkway and part of Central Park. The outline planning application sought approval in principle for the amount, type and form of development relating to a proposed new urban quarter, reconnecting separate parts of the town centre, establishing continuous parkland across Parkway, and mixed use, high density development.

4.48 Planning permission has also been granted (subject to a S106 agreement) for phase 1 of the development of land east of High Street. This is includes circa 1,060 sq m (gross) of A1/A2/A3 floorspace in a range of units comprising generally small scale retail and riverside cafes/restaurants.

4.49 There are ongoing discussions relating to future phases and development, which could provide additional retail floorspace, although we understand the area is likely to be characterised mainly by residential uses, with small scale, specialist retail and eating/drinking uses. This area is unlikely to provide any major comparison retail floorspace.

4.50 Ranking of retailer requirements is a useful tool to analyse the current demand and investor confidence in a town centre. In October 2000, Chelmsford had 84 retailer requirements equating to a rank order of 44. By April 2005, retailer requirements increased to 112, whilst the rank increased to 40, which illustrates that investor confidence is increasing in Chelmsford town centre.

4.51 Retailer requirements in Chelmsford include a range of comparison goods retailers with floorspace requirements of between 25,482 sq m gross and 59,201 sq m gross in Chelmsford town centre. The most significant requirement is for House of Fraser, which has a requirement for a store of between 9,290 sq m gross and 18,580 sq m gross. Other multiple retailers include Zara and TJ Hughes. In addition to published requirements, it is evident John Lewis has a requirement for the general sub-region. Accommodating these key department store operators in Chelmsford town centre in the future, rather than allowing them to locate elsewhere in the sub-region, would substantially enhance the quality of the retail offer in the town centre and strengthen its position in the retail hierarchy.

SUDBURY

4.52 Sudbury is situated in Babergh District Council and is located on the A131 equidistant between Bury St Edmunds and Braintree. Sudbury is the highest order retail centre in the District, and as such top of Babergh's retail hierarchy and the focus for further retail development in the District. A Retail Capacity Study commissioned by the Babergh Council concluded that "Sudbury town centre is in good and improving retail and economic health." The study identified significant capacity for additional convenience and comparison floorspace in the centre.

4.53 Sudbury draws circa £49.0m of comparison goods expenditure from the North Essex survey area, equating to circa 2.9% of total available comparison goods expenditure. The majority of this trade is drawn from Zone 2 where Sudbury has a 40.3% market share. The influence of Sudbury on the North Essex study area is illustrated on Plan 8.

4.54 Sudbury has 278 retail units with its main retail offer concentrated around Market Street, Old Market Place and North Street. A range of multiple retailers are located here including New Look, Woolworths, Boots, Argos and Burtons. In terms of convenience provision, Sudbury has a Somerfield and a small Iceland as well as a monthly Farmers Market. The centre has a high proportion of charity shops and vacant units although the majority of these are on the outskirts of the town centre. There are currently 19 retailer requirements for Sudbury from a range of operators including Peacocks, Ask and Pizza Express.

HAVERHILL

4.55 Haverhill is located in St Edmundsbury Borough Council and lies on the junction of the A1307 to Cambridge, the A143 to Bury St Edmunds and the A107 to Braintree or Sudbury. Haverhill is situated at the top of the retail hierarchy in the Borough and is designated as one of St Edmundsbury's two Town Centres. Haverhill serves a large area including the town itself and a considerable number of surrounding smaller settlements. The proximity of and ease of access to larger centres (particularly Cambridge) limits Haverhill's catchment in the wider area.

4.56 Haverhill draws circa £29.0m of comparison goods expenditure from the North Essex survey area, equating to circa 1.7% of total available comparison goods expenditure. The majority of this trade is drawn from Zone 1 where Haverhill has a 23.1% market share. The influence of Haverhill on the North Essex study area is illustrated on Plan 9.

4.57 Haverhill is a linear centre with 171 retail units and the retail offer is distributed along High Street, Market Hill and Queen Street. The majority of the multiple retailers including Dorothy Perkins, Woolworths and New Look are located on High Street. A Co-op is the only supermarket provision in the town centre. There are only 4 vacant units in the town and none of these are in the prime shopping area. There are currently 13 retailer requirements for Haverhill from retailers including Shoe Zone, Farmfoods and KFC. It is clear the majority of the requirements are from low end/ discount retailers.

BURY ST EDMONDS

4.58 Bury St Edmunds is situated in St Edmundsbury Borough Council lies on the A14 with Cambridge to the west and Ipswich to the east. Bury St Edmunds is situated at the top of the retail hierarchy in the Borough and designated as one of the St Edmundsbury's two Town Centres. The town acts as a sub-regional centre serving both the town itself and surrounding smaller settlements, as well as the needs of residents outside the borough.

4.59 Bury St Edmunds draws circa £23.9m of comparison goods expenditure from the North Essex survey area, equating to circa 1.4% of total available comparison goods expenditure. The majority of this trade is drawn from Zone 1 and 2 where which have a 10.3% and 11.1% market share respectively. The influence of Bury St Edmunds on the North Essex study area is illustrated on Plan 10.

4.60 The centre has 68,000 sq m of ground floor retail floorspace and 430 retail units. The town retail offer is based around 'Cornhill Walk' shopping centre which opened in 1988. Cornhill Walk is anchored by Marks & Spencer, Palmers and Woolworths and also has an Iceland foodstore. Other retailers in the centre include Top Shop, Laura Ashley, Monsoon and East. There are currently 66 retailer requirements for Bury St Edmunds from a range of retailers including cafes such as Café Nero and Costa, Clothes stores such as Kew and Fat Face and furniture stores such as the Futon Company.

4.61 Planning permission has been granted for the ‘Cattle Market Site’, which will comprise an additional 24,000 sq m gross retail floorspace, including a Debenhams store and 35 shop units. The scheme is due for completion mid 2008 and will substantially improve the retail offer in the town.

LONDON

4.62 As one of Europe’s ‘global’ cities, London performs a broad range of functions: it is a global financial, business and cultural centre, the focus of national government and a major tourist magnet. As a retailing location it is unique in the country in the extent to which it serves not only a resident population, but also overseas visitors, visitors from other parts of the UK and a large working population. Retail provision in London is far more extensive and varied than elsewhere in the UK, incorporating a number of major shopping destinations – Oxford Street, Covent Garden, Regent Street, Bond Street, Knightsbridge, Kensington High Street, Kings Road and the City of London.

4.63 For these reasons, London evidently has an influence on shopping patterns in North Essex. The household telephone survey area indicates that London draws circa £11.9m of comparison goods expenditure from the North Essex study area, equating to approximately 0.7% of comparison goods expenditure. The influence of London on the North Essex survey area is illustrated on Plan 11.

BLUEWATER

4.64 Bluewater is located in Dartford Borough Council to the south west of the North Essex study area, beyond Chelmsford (Junction 1a, M25). Bluewater is a large out of centre regional shopping destination which opened in March 1999 and has a retail floorspace of approximately 139,355 sq m gross, and a leisure floorspace of approximately 13,935 sq m gross. Bluewater’s environment, built within a former chalk quarry, is dominated by 50 acres of parkland and seven lakes. The development cost around £700m and the retail mall is arranged over two levels, and anchored by House of Fraser, John Lewis and Marks & Spencer. The centre is said to have the largest food court in the UK, as well as a 12 screen multiplex cinema, pubs, crèche and supervised play area.

4.65 It is evident from the results of the household telephone survey that Bluewater shopping centre draws circa £8.4m of comparison goods expenditure from the North Essex study area, equating to approximately 0.5% of total available comparison goods expenditure. The influence of Bluewater on the North Essex survey area is illustrated on Plan 13.

LAKESIDE

4.66 Lakeside Shopping Centre lies in the Borough of Thurrock. The shopping centre opened in 1990 and the Thurrock Local Plan (1997) designated Lakeside as a regional shopping centre and allocated it top of their retail hierarchy. Lakeside is not however listed as a retail centre in the East of England Plan as the Plan states that it is a regional out-of-town retail centre and does not have the range of functions of a town centre. Lakeside has 109,00 sqm gross of retail floorspace with key retailers including Marks & Spencer, House of Fraser, Debenhams, and Hennes. The shopping centre is open 10 –10 weekdays, 9 -7.30 Saturdays and 11 – 5 Sundays. There are 13,000 free parking spaces and a food court.

4.67 It is evident from the results of the household telephone survey that Lakeside shopping centre draws circa £12.8m of comparison goods expenditure from the North Essex study area, equating to approximately 0.8 % of total available comparison goods expenditure. The influence of Lakeside on the North Essex survey area is illustrated on Plan 12.

SUMMARY

4.68 To define an appropriate survey area, we drew extensively on previous survey work undertaken to underpin the Structure Plan Review Town Centres Study (January 2002) and the Chelmsford Retail Study (GVA Grimley, January 2005). Further inputs included detailed consideration of the geographic area and discussions with the North Essex client team. A household telephone survey was carried out with a sample of 2,000 households, broken down into 20 Zones.

4.69 In terms of higher order shopping trips, North Essex faces competition from Cambridge, Ipswich, Chelmsford, Lakeside, Bluewater and London, which are amongst the strongest shopping destinations in the UK. Our findings highlight Chelmsford, Ipswich and Sudbury as the key competing centres in terms of trade draw, and proposals are in the pipeline to consolidate and strengthen retail provision in these centres still further. In Ipswich, the implementation of the Mint Quarter will provide an additional 30,000 sq m of retail and 10,000 sq m of leisure floorspace. In Chelmsford, a number of plans/proposals are in the pipeline to increase floorspace, and pre-application discussions with developers are ongoing.

4.70 Cambridge, London and Bluewater are the strongest centres competing with North Essex, but due to distance have a more limited influence on trade draw compared to Chelmsford, Ipswich and Sudbury. Cambridge has embarked on a major town centre shopping scheme which is likely to impact upon shopping patterns in North Essex to some extent – particularly given the ‘John Lewis’ attraction. London and Bluewater are likely to maintain a level of influence on North Essex over the forthcoming LDF periods due to the extent of retail and leisure floorspace.

4.71 The influence and planned consolidation of retail provision in Ipswich, Chelmsford and Cambridge pose a threat to trade retention in North Essex, particular in relation to the higher order shopping role of Colchester. The level of investment planned in the competing sub-regional centres will strengthen their role in the hierarchy, and increase their market share from the North Essex survey area. In these circumstances it is less relevant for the lower order centres in North Essex, but it will be important for Colchester to improve its retail offer, in line with current proposals, to maintain its market share and its position as a Major Regional Centre as envisaged in the East of England Plan.

5. THE NORTH ESSEX CENTRES

5.1 Previous sections have set the national and regional context. This section focuses on North Essex in more detail and provides an overview of the North Essex centres, and in particular recognises their position within the current retail hierarchy. First, we summarise the composition and role of each of the North Essex centres. Detailed health checks are attached in the Stage 2 reports. Second, we discuss how we have benchmarked the centres based on their existing performance and set out what we consider to be an appropriate retail hierarchy in accordance with definitions outlined in PPS6. This enables a consistent baseline position with which to put forward our recommendations for new development and the network of centres over the forthcoming LDF periods.

BRAINTREE DISTRICT COUNCIL

Braintree

5.2 Braintree is located in the heart of the District, between Halstead to the north and Witham to the south (Plan 1). The A131/A120 Braintree By Pass and A131 Great Notley By Pass have removed through traffic from the town, and provide links to the primary road network. Of the three towns in the District, Braintree has experienced rapid population growth and the most significant changes in retailing over the last ten years.

5.3 Our detailed qualitative assessment of Braintree town centre indicates that the town centre is performing reasonably well, with a good performance in a number of health check indicators. The centre has an above average proportion of floorspace in the convenience category, and the town centre benefits from excellent major foodstore provision. There is a below average proportion of vacant units, and a good range of service providers from every category. Braintree town centre has a reasonable range of mid-order multiple retailers, the majority of which are located in George Yard – a clean, modern and pedestrian friendly shopping environment. Rents have increased since 2003, yields have remained consistent in recent years, and the centre benefits from a full range of transport/accessibility options.

5.4 Our analysis has identified some areas of weakness in the health of the town centre. Braintree town centre has a below average number of units occupied by comparison goods retailers, including those from the clothing and luxury goods categories. A number of mainstream national multiple retailers are not represented, and there are no higher order national multiples in the town centre. This is perhaps consistent with the centres lower level in the wider retail hierarchy compared to the nearby sub-regional centres such as Colchester, Chelmsford and Lakeside, although the centre should maintain/enhance this provision in accordance with its role in the Structure Plan as a Principal Town Centre.

5.5 The strength of the service sector could become a reason for concern over the forthcoming LDF period, particularly if it continues to grow at the expense of the comparison goods clothing/footwear categories, and other Use Class A1 retailers. Retailer demand has not grown in recent years, and the centres overall rank has fallen considerably. Those retailers with a requirement are of poor quality and will not enhance the clothing/footwear offer. In terms of leisure, the Freeport Leisure Park provides the main commercial entertainment provision, and the restaurant/bar offer in the town centre is weak.

5.6 The nearby, out of centre, Freeport Braintree Factory Outlet Village is located to the south east of Braintree Town Centre on the A120. It opened in 1999, has a floorspace of 18,900 sq m gross and is open until 6pm Monday-Saturday, 8pm on Thursdays and 5pm on Sundays. Anchored by Burberry, Nike factory store, Tommy Hilfiger, and the Versace company store, the factory outlet centre has over 80 shops offering leading brands at up to 50% off High Street prices. The outlet village has a good retail mix of designer retailers and restaurants including Pizza Express and the Tutti Grille Restaurant. Several coffee shops are also represented in the outlet village including Starbucks and Coffee Republic.

5.7 Although there is little greenery, the environmental quality of the site is particularly good, with clean pedestrianised streets, a compact layout, sufficient places to sit, and a water feature. In 2002, the outlet centre expanded to include a 10,000 sq m leisure complex. The leisure centre includes a health & fitness club, family entertainment centre and major restaurant operators.

Halstead

5.8 Halstead is situated in the central area of the district, lying 7 miles north of Braintree, south of Sudbury, and west of Colchester. Halstead is designated as a Town Centre in the adopted Local Plan, together with Braintree and Witham; and as a Principal Town Centre in the Structure Plan, again, alongside Braintree and Witham. Contrary to these definitions, the Local Plan suggests the centre has a lower order role, stating that it functions as a country market town, with a range of shops and services. The Local Plan states that new development is to be concentrated in Braintree and Witham and to a lesser extent Halstead.

5.9 Our detailed qualitative assessment of Halstead indicates that the town centre is healthy and performing well in a number of health check indicators. The centre is smaller in scale than Braintree and does perform a lower order ‘everyday’ shopping role for local residents, focused less on clothing/footwear and luxury items found in the higher order centres and more on everyday household requirements. Following our analysis, it’s description as a Market Town in the adopted Local Plan appears appropriate.

5.10 The proportion of units in the convenience and comparison goods categories is in line with the national average, and the proportion of units occupied by service businesses is above the national average – offering a good range of everyday financial and other services. Vacancy rates are below the national average and there are no specific problem areas. The low number of multiple retailers reflects the centres position in the retail hierarchy, but the representation of a small selection of key attractors is a particular strength for Halstead. Halstead has two major foodstores, Somerfield and Co-Op, a reasonable selection of bars and restaurants, and the four retailer requirements for space in the centre are all from good performing multiples. The environment is generally good throughout the centre, offering an attractive historic environment and a number of historic buildings.

5.11 Our analysis has identified very few areas of weakness in the health of the town centre. Notably, the Co-Op appeared quiet on the day of the site visit and footfall in Weavers Court was low. The Centre, a street adjoining the High Street, is occupied by poor quality retail units, although does adjoin a development opportunity area with potential over the forthcoming LDF period. The High Street has a heavy traffic flow, and there are few pedestrian crossing points restricting the flow of pedestrians throughout the centre. The strong proportion of service business could be a cause for concern if this sector continues to grow at the expense of comparison and convenience retailers which, at present, maintain the vitality and viability of the centre.

Witham

5.12 Witham is situated in the southern part of the District, lying south of Braintree and Witham, and north of Chelmsford and Maldon. Witham is designated as a Town Centre in the adopted Local Plan, together with Braintree and Halstead; and as Principal Town Centre in the Structure Plan, again, alongside Braintree and Halstead. The Local Plan states that Witham Town Centre provides primarily food and other convenience retailing for the local population; and that new development is to be concentrated in Braintree and Witham and to a lesser extend Halstead.

5.13 Our detailed qualitative assessment of Witham indicates that the town centre is healthy and performing well in a number of health check indicators. The centre has a strong convenience goods role, with an above average number of foodstore retailers anchored by a large Tesco store. There is a strong range of all categories of service businesses, enhancing the centres role as an everyday, top up shopping destination. Although more limited than Braintree, there is a relatively good selection of national multiples for a centre of this size and position in the retail hierarchy, considerably strengthening the attraction of the centre.

5.14 Retail demand in Witham is low, but has seen a slight increase in recent years. Those retailers with a requirement registered are also strong key attractors and would enhance the retail provision in the town centre. Retail yields have fallen since 2004 and vacancy rates are well below the national average. The centre benefits from good accessibility by a choice of mode of transport which is identified for ongoing investment over the Plan period, and the environmental quality of the centre is high with a complementary mix of modern and historic buildings.

5.15 Our analysis has identified some areas of weakness in the health of the town centre. Notably, the proportion of comparison retailers is below the national average, although this is often usual for a smaller centre at this position in the retail hierarchy. Witham does have a strong service sector, although the continued growth of this sector could be a cause for concern over the LDF period if it occurs at the expense of the comparison and convenience sectors. The Newland Shopping Precinct has a poor environment detracting from the overall shopping experience, and the evening economy is weak in terms of restaurant and bar provision. Retailer demand has increased, but the centre has experienced an overall decrease in national rank position. Rents have remained static over a long time period, and the centre suffers from localised traffic congestion.

COLCHESTER BOROUGH COUNCIL

Colchester

5.16 Colchester is a Sub-Regional Centre, and is the largest centre within the North Essex Study Area serving a sizeable, largely rural primary catchment area. The catchment is constrained by Ipswich to the north east and by Braintree and Chelmsford to the west and south west respectively.

5.17 Our detailed qualitative assessment of Colchester indicates that the town centre is healthy and performing well in a number of health check indicators. Our analysis of the diversity of uses highlights the role of Colchester as a comparison goods shopping destination. The proportion of units occupied by comparison retailers is above the national average, while the proportion of units occupied by convenience and service retailers is below the national average. Colchester has an excellent range of mid-market multiples, but representation from higher order/luxury clothing and footwear retailers could be enhanced.

5.18 While we consider that Colchester town centre appears to be performing well, there are signs that any stronger growth has been held back in recent years due to the constrained nature of the centre and lack of new development. In particular, rental levels have remained static since 2002. The proportion of vacant units is below the national average, and retailer demand for space in the centre is strong indicating restrictions on space for new retailers. In these circumstances, there is a clear need to improve the retail offer of the centre, and risk that without new development its role will decline relative to competing sub regional centres like Chelmsford.

Tiptree

5.19 Tiptree is located 19km south-west of Colchester town centre directly linked via the B1022. The centre forms a traditional high street format, dispersed with a large proportion of residential units. In general, Tiptree has a number of environmental shortcomings. This has been recognised by the Council who has allocated Tiptree within a Central Area Enhancement scheme. It aims to improve the general appearance and vitality of the Church Road area, particularly in respect of its various shopping facilities, but also through the identification of potential improvements.

5.20 Tiptree has a relatively good range of retailers and services providing for the needs of the local community. Typical for a centre of this size the centres provision is mainly that of convenience retailers and services such as banks, estate agents and takeaways. There is a new Tesco foodstore and an established Co-Op foodstore which anchor the centre. There are essential services in the centre such as a Health Centre, an NHS Clinic and a veterinary surgery. The high vacancy rate is however a concern and attracting retailers into a small centre such as Tiptree may prove a difficult.

West Mersea

5.21 West Mersea is located on the coast, 13km south of Colchester town centre in the southern sector of the Borough, some way from the main urban area. It is directly linked to Colchester via the B1025, and is located within Zone 17 of the North Essex Survey Area.

5.22 West Mersea has a good range of convenience retailers with a strong anchor store as well as a range of services. The centre has a good range of services such as banks, launderettes, estate agents and hairdressers in accordance with its role as a district centre. There are also community/sports facilities and a library. However, the layout of the centre is disjointed and functions as two separate locations with a relatively extensive walking distance between them, disadvantaging those less mobile. There are also a relatively high number of vacant units. The environment would benefit from investment in places.

Wivenhoe

5.23 Wivenhoe is located 7km to the south east of Colchester town centre. The designated shopping frontages fall into four distinct areas which are spread out along the main road. Each of the four shopping areas contains a convenience store and serves the very local catchment area for top-up shopping.

5.24 Wivenhoe is the smallest of the rural district centres with only 24 units and provides a more limited range of services and shops than both Tiptree and West Mersea. The centre has a small Co-op foodstore acting as a local top up shop, and there is a Post Office and a small Library. There are two vacant units, and a sizeable car park which was quiet on the day of the site visit and appears sufficient provision for the centre. Traffic flows are light, given the centre’s location on the estuary, and the environment provides an attractive and characteristic local shopping centre.

MALDON DISTRICT COUNCIL

Maldon

5.25 Maldon is an historic hill town with a strong maritime tradition in an attractive setting at the head of the Blackwater Estuary, home to many Thames sailing barges. The town centre falls entirely within a designated Conservation Area ensuring tight restrictions on demolition, development and shop frontages. The built environment is dense and opportunities for development are constrained.

5.26 Our detailed qualitative assessment of Maldon indicates that the town centre is healthy and performing well in a number of health check indicators. The centre has an above average provision of comparison goods and service retailers, and the proportion of vacant units is below the national average. The town centre has a good selection of smaller independent comparison and convenience goods retailers and a small selection of national multiple comparison goods retailers. Retailer demand has increased marginally, yields have remained stable since 2000, and vacant units are spread throughout the centre indicating no particular problem areas.

5.27 Our analysis has identified some areas of weakness in the health of the town centre. Notably, the proportion of units occupied by national multiples is below the national average, reflecting the centre's lower order shopping role, particularly within the North Essex retail hierarchy where Colchester, Braintree, Clacton-on-Sea and the factory outlet villages provide a considerably wider choice and range of comparison good retailer. Maldon does, however, function effectively as an 'everyday' shopping destination with a good range of independent retailer, and a reasonable selection of national multiples. The centre is easily accessed by bus, but the road network and car parks do suffer from traffic congestion at peak times.

Burnham-on-Crouch

5.28 Best known as a yachting centre, Burnham-on-Crouch is an attractive, historic town situated on the banks of the River Crouch on the East Coast of England in the Dengie, within a designated Conservation Area. The centre is located south east of Chelmsford and south of Maldon, in the eastern section of the District, within Zone 20 of the North Essex survey area.

5.29 Overall, we consider that Burnham-on-Crouch is performing well given its location and relatively rural catchment area. The centre has a good anchor foodstore, but the choice of smaller independent food retailers is limited. In the comparison sector, there is a good selection of independent retailers, but no multiples or clothing/footwear/luxury goods retailers. It may be possible for the centre to exploit the yachting/tourist industry to a greater extent to encourage more of a niche retail role. The centre has only one vacant unit. Burnham on Crouch is performing satisfactorily for everyday retail and service requirements, and the Council should aim to retain key facilities including the Post Office and banks.

Bentall Centre, Heybridge

5.30 The Bentall Centre is located to the north of the town centre and the River Chelmer, accessed via the A414 relief road and B1022. It is a small, open, purpose built shopping precinct around a central square.

5.31 The Bentall Centre is considerably smaller than both Maldon town centre and Burnham-on-Crouch, as reflected in its designation as a District Shopping Centre. The centre is compact providing two anchor foodstores and some everyday services and retail goods, but is lacking a Post Office and bank/financial services. The precinct was busy on the day of the site visit, the car park was full to capacity and the road junction is busy and vehicular exit difficult.

TENDRING DISTRICT COUNCIL

Clacton-on-Sea

5.32 Clacton-on-Sea is located in the south of the District on the coast, between Frinton-on-Sea and Brightlingsea. The A133 provides the town with a major link road to the west, Colchester and beyond. Clacton is the major centre of employment for the District and contains a variety of important manufacturing and service industries. In the service sector, in addition to financial, professional and government services, the leisure industry is well represented.

5.33 Our detailed qualitative assessment of Clacton indicates that the town centre is relatively healthy and performing well in a number of health check indicators. The Primary Shopping Area is clearly defined, and Primary Shopping Frontages have been designated to protect the core shopping role of the town centre and the consequent vitality and viability of retailing over the Plan Period. The proportion of units occupied by comparison goods retailers is above the national average providing a good choice and range of product categories. Clacton-on-Sea has experienced an increase in rental values in recent years, yields have remained static reflecting consistent investor confidence, retailer requirements have increased and the number of vacant units is well below average. The Waterglade Retail Park, within the town centre boundary supplements the retail offer including a Morrisons – a modern foodstore format.

5.34 Our analysis has identified some areas of weakness. The proportion of units occupied by clothing and footwear is below the national average and the representation of key attractors is relatively limited. There are no higher order, luxury retailers in the centre and a number of mainstream national multiple retailers are not represented. Furthermore, whilst retailer demand has risen in recent years, requirements from retailers for space in the centre is limited and weak. Food retailing within the Primary Shopping Area is limited to a ‘top up’ Somerfield foodstore following the closure of Tesco on Station Road, and there is significant out of centre competition. Traffic congestion conflicts with pedestrian movements throughout the centre, although this is being addressed through the Town Centre Strategy, along with a series of environmental improvements.

5.35 The nearby Clacton Factory Shopping Village opened in December 1998 and has a retail floorspace of circa 7,066 sq m net. It is located on Stephenson Road to the north of Clacton town centre, with a shuttle bus linking the two. The Factory Shopping Village sells a variety of adult fashion clothing, footwear and other shopping facilities provided direct from the manufacturers at discount prices. This has improved the retail offer of Clacton as a shopping centre.

5.36 The Factory Shopping Village is a popular tourist attraction and is visited by customers from both outside and within the District. The range of goods sold from the centre is restricted, and permission will not be granted for proposals that include the introduction of unrestricted retail use on the Clacton Factory Shopping Village. The shopping destination provides a clean and modern environment, but appeared relatively quiet on the day of the site visit.

Frinton

5.37 Frinton is located on the East Coast, within Zone 6 of the North Essex Survey Area. It lies approximately 2 miles north of Clacton-on-Sea and 12km south of Harwich, as shown on Plan 1. The centre forms a linear 'high street' layout with shop units aligning both sides of Connaught Avenue, stretching southwards towards the seafront. The town lies within the Frinton and Walton conservation area, and adjacent to 'The Avenues' Area of Special Character.

5.38 Our detailed qualitative assessment of Frinton indicates that the centre is performing well as a local shopping destination in accordance with its designation as a town centre. In particular, the centre has an above average provision of comparison, convenience and service businesses, and a below average number of vacant units. There is a strong representation of independent foodstores and specialist independent comparison retailers enhancing the attractiveness and interest of the centre. There is a good range of essential every services including banks, building societies, opticians, hairdressers and the post office. Accessibility to the centre is good via a choice of means of transport, and the environment is one of the centres key strengths, with evident signs of investment and an overall feeling of security.

5.39 In general, Frinton is performing well and we conclude that the town centre is healthy and strong, but we have identified some areas that could be invested in and improved. The strong retail function of the centre should be maintained, but we have identified a particularly limited number of cafes which help maintain visit times of shoppers. Parking in the centre is provided along the full length of Connaught Avenue, but provision is limited and was raised as a problem in the results of the in-centre survey. The centre has no pedestrian crossing points, and pavements and kerbs do not assist wheelchair users or those with prams and pushchairs.

Dovercourt

5.40 Dovercourt lies immediately south of Harwich in the eastern part of the District. Its location in the District and wider catchment area is illustrated on Plan 1.

5.41 Overall we consider that Dovercourt in performing well. The centre has a good anchor foodstore and a reasonable range of convenience and comparison retailers as well as service operators. Dovercourt has a good environmental quality when compared with competing centres such as Harwich. The centre also has a number of attractive buildings along the High Street, however many of the fascias are not in keeping with these historic buildings, or the landscape. Our analysis has identified some areas of weakness. Notably, Dovercourt has very high yields and have been over 10% for 5 years, which highlights the lack of investor interest in the town centre. Dovercourt also has a high proportion of vacant units.

Brightlingsea

5.42 Brightlingsea is a small coastal town in the southern part of Tendring District on the shores of the Colne Estuary. The town occupies an island site, being partially encircled by Alresford and Brightlingsea Creeks. The town is approximately 12km west from the outskirts of Clacton. The Primary Shopping Frontages run along Victoria Place an east-west axis. It runs as far east as the corner of High Street and as far west as Queen Street. The whole of the defined town centre lies within a Conservation Area.

6.1 Brightlingsea has a good mix of retail and service uses for a town of its size and a number of specialist shops and services, many of which are associated with sailing. Brightlingsea, is a leafy, green, quiet town when compared with other centres in Tendring. The centre is easily accessible on foot for local residents and the overall quality of the environment is good with very little litter and a friendly atmosphere. However, Brightlingsea is a remote small town and relatively inaccessible meaning the centre is a quiet one and the town appears to have suffered as a result of the decline in tourism.

Manningtree

5.43 Manningtree town centre is located in the north of Tendring District on the southern bank of the River Stour, approximately 20km north of Clacton and close to the border of Suffolk. Manningtree is located on the B1352 which runs along the south bank of the River Stour between Manningtree and Harwich.

5.44 Manningtree has been promoted as “England’s smallest town” with an emphasis on its historic, distinctive character. There are a number of listed buildings and the central area of the town is designated as an Area of Archaeological Importance. Manningtree has a reasonable retail offer and has a popular market on Wednesdays and Saturdays. The narrow streets and pavements in and around the town can cause conflict between pedestrians and vehicular traffic, particularly during peak periods and the summer months.

Walton-on-the-Naze

5.45 Walton is a seaside town and coastal resort located east of Frinton along the B1336, which links to the B1033 and the regional road network beyond. The whole town centre falls within a Conservation Area.

5.46 Walton town centre provides a range of shops and services for a predominantly local shopping catchment area. The overall quality of the landscape is of a high standard. Vacancy levels in the centre are high although this falls during the summer months, as many of the shops are seasonal due to tourism. The compact nature of the town and the narrow streets can cause congestion within the town centre, particularly when deliveries are being made.

Harwich

5.47 Harwich is located within the eastern part of the District set along the east coastline. It is located north of Clacton and Frinton and east of Colchester, as illustrated on Plan 1. The A120 provides Harwich with a good link road to the western section of the District and beyond.

5.48 Our detailed qualitative assessment of Harwich indicates that the town centre is under performing in a number of health check indicators. There is an extremely high vacancy rate in Harwich and the centre appears unable to attract multiple, mid range or independent retailers. The centre is also lacking in a number of key services. Although retailer requirements have risen slightly they would not significantly improve the retail provision in the centre. The environmental quality of the town centre is particularly poor and there is a lack of parking in or near the town centre.

SUMMARY

5.49 Our review of the North Essex Centres indicates that most are performing well although there is considerable scope for improvement. Colchester is clearly the dominant sub regional centre and scores well against the PPS6 health check indicators. There is clearly potential for significant further comparison retail floorspace, and indication that despite its current strengths, without such development Colchester could decline relative to other improving sub regional centres such as Chelmsford.

5.50 The larger town centres, notably Braintree and Clacton are performing reasonably well. Taken together with their respective factory outlet centres, both provide a reasonable range of convenience and comparison goods, and looking ahead, maintaining and improving the range of main foodstore and other convenience and service uses will be crucial to underpin their vitality and viability. The scope from further major comparison retail floorspace is likely to be more limited given the available opportunities and current market trends.

5.51 In the case of the other North Essex Town Centres and smaller district centres, our health checks again suggest that these are generally performing adequately. Most are largely underpinned by their convenience retail offer and main foodstore ‘anchors’, supplemented by other local convenience and comparison retailers and service uses. However, the centres all potentially face challenges arising from retail trends and the polarisation of comparison retailer demand towards the major multiple retailers, and towards larger dominant centres like Colchester.

5.52 In these circumstances, while the overall strategy should seek to maintain and enhance the main foodstore and other retail anchors which underpin the retail offer of the centres, the strategy should also seek to develop the unique role and characteristics of each, based on niche and specialist independent retailers, and building on the unique historic attractions and quality environment which many offer to both their local catchment and the important visitor economy.

6. SCOPE FOR NEW DEVELOPMENT

6.1 We have drawn on a combination of bespoke surveys and existing/published data to develop a means of assessing global capacity for retail and commercial leisure uses. We have modelled the current performance of the town centres and out-of-centre retail provision in North Essex, as the basis for forecasting the need for further retail floorspace to the period 2021, incorporating interim years of 2011 and 2016. The capacity tables accompanying this assessment are attached in Appendix 4 and 5.

6.2 We have used a conventional and widely accepted step by step methodology which draws upon the results of the Household Telephone Survey of existing shopping patterns to model the existing flows of available expenditure to each retail destination. To develop a baseline position, we have:-

- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode areas comprising the North Essex survey area;
- Allocated the available expenditure to the convenience and comparison goods shopping destinations, on the basis of the Household Telephone Survey of shopping patterns, so as to provide estimates of current sales and forecasts of future sales;
- Compared the total expenditure attracted to each shopping destination with current retail floorspace to assess sales densities in each shopping destination.

6.3 Building on the baseline position, we have explored the capacity for further convenience and comparison retail floorspace within each of the four NEA's, and assessed global capacity for the whole of the North Essex area. This enables us to provide a means to test alternative options for the spatial distribution of new development between the North Essex centres.

6.4 We have also considered the capacity for key commercial leisure uses, including cinemas, bars/restaurants and casinos, although with the exception of certain major 'destination' functions e.g. regional casinos, these uses tend to be ancillary to the dominant comparison goods retail function of most higher order centres. These are expressed as global capacity projections, but again we have examined the spatial options for new strategic leisure facilities.

6.5 In developing our methodology, we have drawn on established best practice and our extensive experience in this field. In particular, GVA Grimley are closely involved in preparing the forthcoming ODPM Good Practice Guidance and Retail and Leisure Need and Impact Assessment, which identifies the importance of regional and sub-regional strategies and sets out a number of basic guiding principles:

- The need for a transparent methodology.
- The need to use objective and up to date data inputs.
- The need to justify the use of growth rates and key assumptions used in the analysis.
- The importance of identifying alternative options and objective testing.

6.6 The methodology we have developed for the North Essex Retail Study builds on these guiding principles. The detailed retail capacity analysis for each of the four NEA's is set out in the Stage Two reports. The detailed capacity modelling tables are attached in this report in Appendix 4 and 5. We outline the key data inputs, assumptions and conclusions below.

RETAIL CAPACITY – COMPARISON GOODS

Catchment Area and Household Survey

6.7 The survey results identify shopping habits of households for both convenience and comparison goods. Where necessary, the survey results have been re-based to remove inappropriate responses, such as 'internet/mail order shopping'. For convenience goods, the Household Telephone Survey including questions on main food and top-up food shopping. The results of the two types of food expenditure were then merged through the application of a weight, which reflect the estimated proportion of expenditure accounted for by each type. For food we use a 75% / 25% top-up food weighting. This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore, for each survey zone.

6.8 The survey also includes six questions on specific comparison goods types which coincide with Experian Business Solutions definitions of comparison goods expenditure. The retail and needs modelling exercise uses the weighted averages of the Household Survey responses for each goods type based on the proportion of per capita expenditure on that goods type. This process will establish the pattern of spending for residents of each zone in terms of the following of types:

- Clothes and shoes;
- Furniture, floor coverings and household textiles;
- DIY and decorating goods;
- Domestic and electrical appliances;
- Electronic/entertainment goods including TV, hi-fi and radio;
- Personal/luxury goods.

Estimates of Population in the Survey Area

6.9 Population estimates and forecasts for each of the survey zones were prepared from the Experian E-marketer in-house system. This provides estimates of population in 2006, 2011, 2016 and 2021. Experian data is based on trend line projections and the 2001 census for small, localised areas. Overall, the population of the survey area is currently 639,371. It is forecast to grow to 654,345 by 2011, 672,611 by 2016, and again to 691,921 by 2021. These figures represent a growth of circa 3% over each five year time period, and an overall growth of 8% between 2006 and 2021 (Table 1, Appendix 4).

Per Capita Expenditure Projections

6.10 The Experian E-marketer system provides estimates of per capita expenditure for convenience and comparison goods in 2003 prices. We have made deductions for special forms of trading which represent expenditure not available to spend in the shops, i.e. internet and catalogue shopping.

6.11 In terms of expenditure growth in North Essex, we have drawn on convenience and comparison goods growth rates provided by Experian Business Solutions. These indicate that more growth will take place on comparison goods as opposed to convenience goods; the scope to purchase more food is more limited than the scope to purchase non-food goods. Experian Business Solutions estimate a convenience goods growth rate of 0.7% per annum and a comparison goods growth rate of 4.3% per annum. These rates, derived from Experian Business Solutions, have replaced the ultra long term projections of 3.6% (comparison) and 0.1% (convenience) per annum previously measured by URPI over the period since 1963, and reflects sustained high levels of per capita expenditure growth on comparison goods in recent years. Latest indications are that even this higher rate may be conservative, but we have assumed that this a realistic growth rate to apply over the study period, allowing for inevitable fluctuations based on wider economic conditions.

6.12 In terms of convenience goods, the current per capita expenditure is £1,625 per annum. This is forecast to grow to £1,682 per annum by 2011, £1,742 per annum by 2016 and again to £1,804 per annum by 2021. It is evident from Table 6.1 that spending per capita on convenience goods is marginally higher than the national average. In 2006, per capita spending on convenience goods is circa 4.7% above the national average. If the various RPG growth strategies are achieved, there is no reason why these expenditure estimates within North Essex will decline.

Table 6.1: Convenience Goods Per Capita Expenditure – UK and North Essex Comparison

Convenience Goods							
2006		2011		2016		2021	
NE	UK	NE	UK	NE	UK	NE	UK
£1,625	£1,551	£1,682	£1,607	£1,742	£1,664	£1,804	£1,723

Source: Experian E-marketer Business Solutions

6.13 In terms of comparison goods, the current per capita expenditure is £2,666 per annum. This is forecast to grow to £3,291 per annum by 2011, £4,062 per annum by 2016 and again to £5,013 per annum by 2021. It is evident from Table 6.2 that current per capita expenditure in North Essex is 1.2% above the national average.

Table 6.2: Comparison Goods Per Capita Expenditure – UK and North Essex Comparison

Comparison Goods							
2006		2011		2016		2021	
NE	UK	NE	UK	NE	UK	NE	UK
£2,666	£2,635	£3,291	£3,252	£4,062	£4,014	£5,013	£4,954

Source: Experian E-Marketer Business Solutions

Total Available Expenditure

6.14 Table 2, Appendix 4 applies per capita expenditure to population forecasts, which indicates that total available convenience goods expenditure within the North Essex survey area is currently £1,038m. This is forecast to grow to £1,100m by 2011, £1,171m by 2016 and again to £1,248 by 2021. This equates to an overall growth of £239m between 2006 and 2021 (Table 2, Appendix 4).

6.15 Total comparison goods expenditure available in the catchment area in 2006 is approximately £1,704m, rising to £2,153m in 2011, £2,731m in 2016, and again to £3,468m by 2021 (Table 2, Appendix 4). This equates to an overall growth of £1,764m between 2006 and 2021 (more than 100% growth). (Table 2, Appendix 4).

Comparison Goods Turnover

6.16 Using the composite market shares derived from the Household Survey, and base expenditure estimates, we calculate the comparison turnover of the North Essex centres and out-of-centre retail provision. This provides an objective measure of the current performance of each centre, and detailed analysis of each centre’s catchment and shopping/leisure patterns and role within the wider retail hierarchy.

6.17 We have drawn on specially commissioned in-centre surveys to help define the extent of the catchment areas of the bigger centres and destination shopping experiences, notably Colchester, Braintree, Clacton-on-Sea and the Braintree and Clacton-on-Sea Factory Outlet Villages. The surveys enabled us to robustly estimate the proportion of shoppers in the centres travelling from beyond the survey area boundary, i.e. the inflow of trade. The assessment enabled us to calculate a 14% inflow to Colchester; a 7% inflow to Braintree town centre; a 41% inflow to the Braintree Factory Outlet Village; a 20% inflow to Clacton-on-Sea town centre; and a 52% inflow to the Clacton Factory Outlet Village.

6.18 Table 6.3 highlights the turnover of the North Essex centres in the base year (2006) and forecast years of 2011, 2016 and 2021. These baseline turnover projections are underpinned by constant market shares and the assumption that existing shopping patterns will be maintained over the LDF periods.

Table 6.3: North Essex Centres – Comparison Goods Turnover by Centre

Centre	Turnover 2006	Turnover 2011	Turnover 2016	Turnover 2021	Total Increase in Turnover
Colchester	509.1	646.7	831.4	1,069.8	560.7
Clacton-on-Sea	110.9	140.0	178.5	227.5	116.6
Braintree	67.0	82.8	102.2	126.3	59.3
Maldon	30.9	38.5	48.1	60.0	26.9
Frinton-on-Sea	15.5	18.8	23.3	28.9	13.4
Dovercourt	12.9	16.9	22.1	29.0	16.1
Witham	10.4	12.7	15.8	19.7	9.3
Harwich	8.8	11.4	15.0	19.6	10.9
Halstead	7.8	9.6	11.7	14.4	8.0
West Mersea	2.5	3.0	3.7	4.5	2.0
Brightlingsea	2.3	3.0	3.9	5.1	2.8
Tiptree	1.6	1.8	2.6	3.6	1.9
Wivenhoe	1.5	1.9	2.4	3.1	1.6
Walton-on-the-Naze	1.2	1.5	1.9	2.3	1.1
Burnham-on-Crouch	1.1	1.4	1.7	2.1	1.0
Manningtree	0.2	0.3	0.4	0.5	0.3
Heybridge	-	-	-	-	-

6.19 In addition to the town centres, the Braintree Outlet Village currently has a turnover of £60.6m, forecast to grow to £116.4m by 2021. The Clacton Factory Outlet Village in contrast, currently has a turnover of only £17m, and is forecast to grow to £34.3m by 2021. This represents a significant difference in turnover based on only a small variation in floorspace, the Braintree Factory Outlet has a floorspace of 12,300 sq m net compared to the Clacton Factory Outlet Village that has a floorspace of 7,066 sq m net. These figures suggest trading levels are considerably stronger in the Braintree Factory Outlet Village.

6.20 Within the North Essex survey area, all town centres, factory outlet centres and free-standing stores collectively account for circa £913.0m of comparison goods expenditure at present, equating to 53.6% of total available comparison goods expenditure (£1,704.6m). The centres identified in Table 6.3 collectively retain 46% of the available comparison goods expenditure of the residents of the North Essex survey area. As we have identified in Section 4, the major competing centres in the wider sub-region draw circa £405.9m (23.8%) of total available comparison goods expenditure in the North Essex survey area. The remaining 30.2% of expenditure is travelling to smaller local shopping facilities in North Essex and other town centre and out-of-centre retail destinations beyond the North Essex authorities.

Floorspace Efficiency Growth

6.21 One of the key variables influencing global capacity on any scenario is the adjustment used to factor in increases in floorspace efficiency. One of the main drivers to expenditure growth on comparison goods has been growth in the value, as opposed to volume, of purchases. A good example is high value flat screen televisions replacing lower value, higher bulk predecessors. As a consequence, it would not be appropriate to translate the forecast growth in comparison goods retail sales directly into a need for additional floorspace.

6.22 Two factors need to be taken account :-

- First, North Essex contains a multiplicity of town and district centres, with a substantial stock of retail floorspace developed to meet very different retailer requirements and economic circumstances. Translating current and forecast expenditure into floorspace requirements requires careful consideration of how existing vacant stock will be re-used, and how best to achieve the transformation of obsolete space into accommodation of the right type and in the right location to meet current/future needs.

- Second, even if all existing retail/leisure floorspace within North Essex was currently modern and well suited to operator requirements/consumer demands, it would be appropriate to make an allowance for continued real growth in sales of existing floorspace before planning for additional space. Traditionally, an allowance of 1.5% per annum has been made to account for anticipated real growth in existing floorspace out of forecast expenditure growth. More recently, analysis undertaken by Experian suggests that in line with high levels of per capita expenditure growth, actual growth in retail productivity has been considerably higher.

6.23 In these circumstances, in line with emerging good practice and reflecting the long term horizon for this study, we consider circa 2.5% per annum of forecast growth over the study period should be hypothecated to support existing retail space, to drive productivity and sustain and enhance existing retail areas.

Comparison Goods Capacity in North Essex

6.24 In order to translate residual expenditure into floorspace, we have assumed a range of sales densities depending on the size of the centre. These range from £6,500 per sq m net in Colchester town centre to £3,000 per sq m net in the smaller centres. For the reasons outlined above, we have incorporated a 2.5% per annum forecast growth in turnover from new floorspace to the period 2021 to enable capacity to be calculated accurately in these future years.

6.25 We have reviewed the capacity for additional comparison goods floorspace in each of the North Essex town centres based on current market shares. This analysis is set out in detail in Appendix 5 and summarised here in Table 6.4 and 6.5.

Table 6.4: Residual Comparison Goods Expenditure by Centre (£000)

Centre	2011	2016	2021
Colchester	80,840	206,309	382,294
Tiptree	-8	459	1,179
West Mersea	219	522	925
Wivenhoe	216	525	954
Braintree	11,406	34,095	64,896
Halstead	739	1,731	3,055
Witham	965	2,501	4,606
Maldon	4,158	9,871	17,626
Burnham-on-Crouch	123	290	516
Heybridge	-	-	-
Clacton-on-Sea	20,742	51,773	94,663
Brightlingsea	399	967	1,766
Dovercourt	2,280	5,589	10,264
Frinton-on-Sea	1,344	3,538	6,509
Harwich	1,664	4,082	7,499
Manningtree	40	96	175
Walton-on-the-Naze	135	321	573

Table 6.5: Future Comparison Goods Floorspace Capacity by Centre (sq m net)

Centre	2011	2016	2021
Colchester	16,039	36,164	59,220
Tiptree	-1	72	163
West Mersea	39	82	128
Wivenhoe	38	82	132
Braintree	1,833	4,843	8,147
Halstead	163	338	527
Witham	213	488	795
Maldon	735	1,542	2,434
Burnham-on-Crouch	20	41	65
Heybridge	-	-	-
Clacton-on-Sea	3,667	8,089	13,072
Brightlingsea	118	252	406
Dovercourt	672	1,455	2,362
Frinton-on-Sea	396	921	1,498
Harwich	490	1,063	1,726
Manningtree	12	25	40
Walton-on-the-Naze	40	84	132

Note: This is global capacity generated in each urban area based on current market shares. It includes in centre and out of centre provision

6.26 Table 6.6 outlines global capacity forecasts for additional comparison goods floorspace by local authority.

Table 6.6: Future Comparison Goods Floorspace Capacity by Local Authority (sq m net)

Centre	2011	2016	2021
Colchester	16,115	36,399	59,642
Braintree	2,318	5,988	10,020
Maldon	757	1,587	2,505
Tendring	3,982	8,780	14,203

6.27 In total, our assessment has identified capacity for an additional 24,190 sq m net of additional comparison goods floorspace by 2011, growing to 53,773 sq m net by 2016 and again to 87,389 sq m net by 2021. Table 6.7 identifies global capacity in sq m net. It also incorporates 15% of A2/A3 uses and non-comparison sales, and converts floorspace into sq m gross using a 65% net:gross ratio.

Table 6.7: Global Comparison Floorspace Capacity Projections for North Essex

Centre	2011	2016	2021
Sq m net	24,190	53,773	87,389
15% A2/A3	28,459	63,262	102,811
Sq m gross (65% net:gross)	43,783	97,327	158,170

Note: 65% net/gross ratio

6.28 These urban area and global capacity projections adopt 2006 as a base year. In other words they take no account of any current over or under trading (i.e. latent capacity). In the case of the smaller town and district centres, based on our estimate of the current performance and health check indicators we consider this is a realistic assumption. In the case of Colchester, our survey indicates that the centre is currently achieving a very high turnover measured in terms of comparison turnover per sq m. This is consistent with the conclusions of our health check that the centre is trading strongly, but has a substantial latent capacity for new development as of now. In these circumstances, our capacity projections for Colchester should be regarded as being conservative.

RETAIL CAPACITY CONVENIENCE GOODS EXPENDITURE

6.29 Table 2, Appendix 4 applied per capita expenditure to population forecasts which indicate that total available convenience goods expenditure within the North Essex survey area is currently £1,038m. This is forecast to grow to £1,100m by 2011, £1,171m by 2016 and again to £1,248m by 2021. This equates to an overall growth of £210m between 2006 and 2021 (Table 2, Appendix 4).

Convenience Goods Turnover

6.30 Addressing each town centre and out-of-centre destination in turn, we have reviewed shopping patterns and the performance of existing convenience goods floorspace. We have discussed the figures in detail in each of the Stage Two reports, and we outline the key conclusions below. We then highlight forecast capacity for each of the four NEA's, and finally a global capacity for North Essex. Modelling tables are set out in detail in Appendix 4.

6.31 Using the composite market shares derived from the Household Survey, and baseline expenditure estimates, we have calculated the convenience goods turnover of the North Essex centres and out-of-centre retail provision. We are able to indicate the performance of foodstores through a comparison with expected company average sales densities.

Colchester Borough

6.32 It is evident from our analysis that the J Sainsbury's in Colchester town centre is performing well above expected trading levels. Likewise, the out-of-centre J Sainsbury at Tollgate West, the Tesco Extra at Highwood Square and the Asda at Turner Rise are all trading above expected levels. The Tesco foodstore at Greenstead Road is not performing as well and is trading below company average expectations. In total, convenience goods provision in Colchester, including out-of-centre provision, has a turnover of circa £228.1m, with an average sales density of £11,308 per sq m net. The floorspace schedule is attached in Table 13-17, Appendix 4.

6.33 Elsewhere in the Borough, the town centre Tesco store on Church Road in Tiptree is trading marginally below expected company average levels. The Co-op in Wivenhoe town centre is trading below average levels, and the Co-op foodstore on Barfield Road in West Mersea town centre is trading well, above expected levels. In total, convenience goods provision in the Borough has a turnover of circa £250m and an overall average sales density of £10,186 per sq m net (total net floorspace 24,583 sq m net).

Braintree District

6.34 Our analysis of the performance of foodstores in Braintree town centre indicate that a number of foodstores are trading well, above expected company average levels: Tesco, Braintree town centre; Tesco, Notley Green; Somerfield, Halstead town centre; Co-op, Abels Road; and Tesco, Witham town centre. All other foodstores appear to be trading below company average levels, including Sainsbury's and Somerfield, Braintree town centre; Tesco, Coggeshall Road; and Morrisons, Braintree Road.

6.35 In total, convenience goods floorspace in Braintree including out-of-centre provision has a turnover of £102.4m. Based on the total net convenience floorspace of 14,866 sq m the stores have a company average sales density of £6,889 per sq m net – below company average levels for the foodstores.

6.36 In Halstead, foodstore provision has a turnover of circa £15.5m. Based on a net convenience goods floorspace of 3,032 sq m, convenience goods provision in Halstead has a sales density of circa £5,116 sq m net. Foodstore provision in Witham has a turnover of circa £44.4m, and based upon a net convenience goods floorspace of 5,618 sq m, these figures indicate a sales density of circa £7,906 per sq m net.

6.37 In total, convenience goods floorspace within the District has a turnover of circa £162.3m. And based upon a net convenience goods floorspace of 23,516 sq m, these figures indicate a sales density of circa £6,904 per sq m net, i.e. marginally below the expectations of major foodstore retailers.

Maldon District

6.38 It is evident from our analysis that in Maldon, the town centre Budgens and out-of-centre Tesco at Fullbridge and Morrisons at Limebrook Way are all under performing, although the Tesco is almost in line with expected company average levels. In total, convenience goods floorspace in Maldon, including out-of-centre provision, has a turnover of circa £66.3m. Based on a total net convenience goods floorspace of 8,298 sq m, these figures indicate that foodstore provision has a sales density of circa £7,408 per sq m net.

6.39 In Burnham-on-Crouch, both the Tesco Express on Station Road and Co-op on Boundary Lane appear to be under performing. Based on a net convenience goods floorspace of 1,544 sq m and an average turnover of £6.6m foodstore provision in Burnham-on-Crouch has a sales density of circa £4,295 per sq m net. The Netto foodstore in the Bentall Shopping Centre is trading above expected levels, and although the Tesco Express in the Bentall Centre has a stronger turnover it is not performing in line with company expectations. Foodstore provision in the Bentall Shopping Centre has a turnover of circa £2.7m, and based upon a net convenience goods floorspace of 346 sq m, foodstores have a sales density of circa £7,905 per sq m net.

6.40 In the District, foodstore provision has a turnover of circa £73m. Based upon a net convenience goods floorspace of 9,538 sq m, our figures indicate that foodstore provision has a company average sales density of circa £7,650 per sq m net.

Tendring District

6.41 It is evident from our analysis that the Somerfield foodstore in Clacton-on-sea town centre is marginally under performing in terms of the floorspace efficiency, as is the Morrisons at the Waterglade Centre, Co-Op on the Five Ways Retail Park, and Tesco on the Brook retail park. The Morrisons on Centenary Way, Tesco Express at Thorpe-le-Soken, and the Somerfield on North Road are all trading strongly above-expected company average levels. In total, foodstore provision in and around Clacton-on-Sea has an estimated turnover of £110.2m. Based on the total net convenience floorspace of 12,457 sq m, these stores have an average sales density of £8,841 per sq m net.

6.42 In Frinton town centre the Co-Op on Connaught Avenue is trading strongly; as is the out of centre Morrisons in Harwich, the Somerfield in Dovercourt town centre, the Co-Op in Brightlingsea, and the Co-Op in Manningtree. The Co-Op foodstore in Walton-on-the-Naze appears to be under-performing. In total, convenience goods floorspace in Tendring District has a turnover of circa £153.8m. Based on a net convenience floorspace of 21,668 sq m, the stores have an average sales density of circa £7,097 per sq m net.

Convenience Goods Capacity in North Essex

6.43 Based on our assessment of the growth in expenditure and the performance of existing floorspace, we consider that there will be surplus expenditure available to support further convenience goods floorspace in North Essex, but only after 2011. Our assessment indicates that there will be an overall deficiency in expenditure of -£15.4m in 2011, but following growth in population and expenditure there will be circa £22.9m of residual expenditure by 2016, growing to £79.2m by 2021. When converting this residual expenditure into floorspace we have incorporated a sales density of £10,000 per sq m net, a minimum level required by most major foodstore operators.

6.44 On this basis, we have reviewed the capacity for additional convenience goods floorspace in each of the North Essex town centres based on current market shares. This analysis is set out in detail in Appendix 5 and summarised here in Table 6.7 and 6.8.

Table 6.8: Residual Convenience Goods Expenditure by Centre (£000)

Centre	2011	2016	2021
Colchester	35,845	55,456	76,757
Tiptree	-5,087	-2,392	816
West Mersea	234	340	449
Wivenhoe	-382	-229	-64
Braintree	-25,376	-21,492	-17,443
Halstead	4,764	5,278	5,812
Witham	-9,714	-8,001	-6,168
Maldon	-10,933	-7,644	-4,184
Burnham-on-Crouch	-505	-195	130
Heybridge	-	-	-
Clacton-on-Sea	-7,323	1,587	11,374
Frinton/Walton	1,474	1,705	1,944
Harwich/Dovercourt	70	3,137	6,507
Brightlingsea	-2,515	-2,132	-1,714
Manningtree	696	1,138	1,619

Table 6.9: Future Convenience Goods Floorspace Capacity by Centre (sq m net)

Centre	2011	2016	2021
Colchester	3,585	5,546	7,676
Tiptree	-509	-239	82
West Mersea	23	34	45
Wivenhoe	-38	-23	-6
Braintree	-2,538	-2,149	-1,744
Halstead	476	528	581
Witham	-971	-800	-617
Maldon	-1,093	-764	-418
Burnham-on-Crouch	-51	-19	13
Heybridge	-	-	-
Clacton-on-Sea	-732	159	1,137
Frinton/Walton	147	171	194
Harwich/Dovercourt	7	314	651
Brightlingsea	-252	-213	-171
Manningtree	70	114	162

Note: This is global capacity generated in each urban area based on current market shares. It includes in centre and out of centre provision

6.45 Table 6.10 outlines global capacity forecasts for additional comparison goods floorspace by local authority.

Table 6.10: Future Convenience Goods Floorspace Capacity by Local Authority (sq m net)

Centre	2011	2016	2021
Colchester	3,061	5,318	7,796
Braintree	-3,033	-2,421	-1,780
Maldon	-1,144	-784	-405
Tendring	-760	544	1,973

LEISURE GOODS EXPENDITURE PROJECTIONS

6.46 The Experian E-marketer Report calculates annual consumer leisure expenditure per person on leisure and recreation goods and services in 2003, based upon the demographic profile of the catchment area. Leisure expenditure as defined by Experian includes recreation and sporting services, cultural services, games of chance and bars/restaurants.

6.47 We have taken the base position and projected available expenditure per capita leading up to 2021, based on the population projections from the study area, assuming an ultra long term growth rate in available expenditure of 2% per annum for leisure goods. This ultra long term growth rate figure is derived from Experian Business Solutions.

Table 6.11: Per Capita Leisure Goods Expenditure Adjustments – Total Study Area

2006 (£)	2011 (£)	2016 (£)	2021 (£)
1,626	1,795	1,982	2,188

Source: Experian Business Solutions, E-Marketer 2006

6.48 The annual consumer expenditure per person on leisure goods, in the survey area is currently £1,626 (2003 prices) based on an average across the study area. Per capita expenditure on these goods will grow to £2,188 by 2021 (Table 6.12). At present (2006) per capita spending on leisure goods in the study area is circa 6% below the national average.

6.49 If we apply the per capita goods expenditure to the total population of the catchment area it highlights that there is currently over £1.057 billion of available leisure expenditure in the catchment area. This is expected to rise to just over £1.57 billion by 2021.

Table 6.12: Total Leisure Expenditure catchment area

	2004 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
Total Survey Area	**1,057,083**	**1,207,425**	**1,378,593**	**1,574,350**

Source: Experian Business Solutions, Emarketer, 2006

6.50 If we break this down by examining the annual consumer spend per local authority (Table 6.13), it reveals that per capita spending is broadly the similar across the four boroughs.

Table 6.13: Per Capita Leisure Goods Expenditure in the four Local Authorities

Local Authority	2006 (£)	2011 (£)	2016 (£)	2021 (£)
Maldon	1,649	1,821	2,010	2,219
Colchester	1,642	1,813	2,001	2,209
Braintree	1,612	1,780	1,965	2,170
Tendring	1,595	1,761	1,944	2,147

Source: Experian Business Solutions, Emarketer, 2006

6.51 We have also examined available leisure spend based on the population of four individual local authorities (Table 6.14). Our assessment highlights significant growth in available leisure expenditure between 2006 and 2021.

Table 6.14: Total Leisure Expenditure

Local Authority	2004 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
Colchester	258,790	297,811	342,653	393,050
Tendring	231,419	262,600	300,009	339,883
Braintree	215,188	249,195	283,995	325,347
Maldon	95,071	104,858	116,855	128,887

Source: Experian Business Solutions, Emarketer, 2006

6.52 Colchester currently has the highest available leisure expenditure out of all the boroughs with £258.8m currently available at 2006 rising to £393.1m in 2021, an increase of 51.9%. Tendring is also expected to see a significant rise from its current position of £231.4m to £339.9m in 2021. Braintree is expected to increase from £215.2m in 2006 to £325.4m by 2021. Whilst Maldon, due to its lower population, currently has the lowest available leisure spend with £95.1m in 2006 which we expect to rise to £128.9m in 2021, an increase of 35.6%.

6.53 The demand for additional quality leisure facilities will naturally grow as the population increases, and within the catchment area the current network of sub regional centres will remain the main policy focus for leisure growth.

KEY LEISURE DESTINATIONS

6.54 Below the global leisure growth projections outlined above, we have undertaken more detailed analysis of two sub sectors. Cinemas perform a key 'anchor' function, and require economies of scale. As such, we have examined how many new facilities will be supported. We have also examined the Casino/Gaming market as this represents a significant new growth sector. Like cinemas, the market for large / regional scale casinos is such that in practice only a limited number of facilities will be supportable. As a consequence, careful consideration needs to be given to defining appropriate centres in which to accommodate the identified capacity. Our assessment also examines future available expenditure to support restaurants and cafes in the catchment area.

i) Cinema Capacity

6.55 We have undertaken a quantitative need assessment for new cinemas within the four North Essex authorities. The methodology compares population per screen UK average with population per screen in North Essex. The shortfall highlights the need for new screens to bring North Essex back in line with the national average. The process also projects forward to 2021 taking into consideration population forecasts and the consequent growth in the need for cinema screens.

6.56 Table 6.15 highlights the number of screens within the four local authority boundaries. It is evident that the majority of the cinemas are drawing 100% of their trade from within the catchment area, we only consider that Cineworld in Braintree would draw trade from beyond the catchment area. This exercise suggests the four local authorities are currently served by 25.8 cinema screens located within the four authority boundaries.

Table 6.15: Number of Cinema Screens Serving Catchment

Cinema	No. of Screens	% of Catchment Overlap	Screens Serving local authority boundaries
Cineworld, Braintree	12	90	10.8
Electric, Parade, Harwich	2	100	2.0
Odeon, Colchester	8	100	8.0
Rio Cinema, Burnham – On- Crouch	2	100	2.0
Empire, Halstead	1	100	1.0
Flicks, Clacton on Sea	2	100	2.0
TOTAL	**27**		**25.8**

Source: Cinemagoing, Dodona Research 2005

6.57 Inevitably residents in each Borough/District will also use the extensive facilities outside this area, particularly in Ipswich and Chelmsford.

POPULATION GROWTH

6.58 Table 6.16 outlines the population per screen in the UK and North Essex local authority areas projecting provision to 2006, 2011 and 2016. Using the population figures it is evident that in our projected years North Essex has more people per screen than the national average, suggesting a deficiency in cinema provision and/or likelihood that residents of the four authorities are using facilities situated outside the area.

Table 6.16: Population per Screen

	Estimated Population (m)	No. of Screens	Population Per Screen
UK (2006)	59.26	3,420	17,327
North Essex (2006)	0.650	25.8	25,194
UK (2011)	59.94	3,978	15,068
North Essex (2011)	0.673	25.8	26,085
UK (2021)	61.14	5,094	12,002
North Essex (2021)	0.720	25.8	27,907

6.59 Table 6.17 draws on the comparison with the UK average and illustrates the capacity for additional cinema provision within North Essex, on the assumption that the four authorities serve their own needs and attract a level of patronage from beyond. On this basis, our assessment highlights capacity for an additional 12 (2006), 19 (2011) and 34 (2021) cinema screens within North Essex to meet national average cinema provision based on our baseline population figures. Even if the trendline position overestimates current capacity, by ignoring the effects of facilities just beyond the area, the ratio of screens per capita is expected to grow over the period to 2021 generating further demand for additional cinemas.

Table 6.17: Capacity for Additional Cinema Provision in four Authorities

	North Essex Authorities Population	UK Population Per Screen	Cinemas Necessary to Match UK Average	Shortfall of Cinema Screens in North Essex Authorities
2006	650,000	17,327	37.5	11.7
2011	673,000	15,068	44.7	18.86
2021	720,000	12,002	60.0	34.19

ii) Casino / Gaming Capacity

Market Size Post Deregulation

6.60 Casino expenditure within the North Essex Authorities can be established by combining Experian's breakdown of gambling expenditure per capita and Mintel's estimates of the casino market. As detailed below in Table 6.18, a breakdown of the catchment populations expenditure per capita identifies the extent of the existing gaming market within North Essex Authorities and from this the current level of casino expenditure estimated.

Table 6.18: Existing Casino Expenditure

Year	Total Population	Gaming Expenditure £ (m)	Casino Expenditure £ (m)
2006	650.2	82.2	7.7
2011	672.7	88.1	7.9
2016	695.6	91.1	8.2
2021	719.5	94.3	8.5

Note:

1: Gaming Expenditure based on "games of chance" spend per capita of £129 - As per Experian Retail Planner Report issued Feb 2006.

2: Casino expenditure assumed as 9% of total gaming market. As per Mintel net gambling expenditure - Mintel Gambler, Nov 2002.

3: 2003 Prices

4: Gaming expenditure grown at 5.3% as per the average growth of casino stakes over the last 5 years - Mintel Gambler, Nov 2002.

6.61 If the market remains subject to the current legislative regulations, using the population projections, it is estimated that as a result of increases in gambling expenditure per head, total expenditure in Casinos from within the authorities will total £7.7 million by 2006 and rise to £8.5 million by 2021.

6.62 In submissions to the Joint Committee on the Draft Gambling Bill, the Cross Industry Group for the gaming industry (CIG) has formulated, in partnership with Pion Economics, an impact model to establish the existing level of expenditure within casinos and to estimate the level to which this will increase following deregulation. Whilst relatively complex in detail, Pion Economics detail the CIG impact model as:

> *"A baseline position is established that accords with "known "features of the existing gambling landscape. This baseline is then adjusted to reflect a "post-regulation" environment and impact of change assessed in terms of various parameters…"*

6.63 Accordingly Pion have developed a baseline position i.e. current, that has been balanced back to evidence of existing UK adult participation with average spend/visit/play figures set in accordance with reported sector profiles, namely that:

- adult participation in UK Casinos will grow from 3 to 10%;
- Average visits to casinos per person, per annum, will increase from 9 to 12;
- average spend per casino visit will fall from £55 to £45.

6.64 The CIG Impact Model has been formulated to anticipate the increase in the market following deregulation as opposed to the ongoing evolution of the market and as such does not make any allowance for year on year expenditure increases per capita. The analysis indicates that following deregulation casino expenditure in North Essex will grow by a factor of 3.64.

6.65 Following deregulation the level of participation in casino gambling is expected to rise significantly. Based on input from the Cross Industry Gambling Group, the Pion model assumes that post deregulation participation in casino gambling should be remodelled at a rate of 10% with average trips increasing to around 12% per annum, whilst average spend is anticipated to decline to £45 per visit. These assumptions have been applied to the North Essex catchment below to estimate what the possible casino spend within the catchment may be following deregulation.

6.66 In reaching a view on these judgements it is important to note that a post deregulation participation rate of only 10% is relatively low in relation to experience elsewhere. In the US for example participation can be as high as 40% in some states, and averages 26% across the US as a whole. We have used these working assumptions therefore as a conservative basis upon which to examine the gaming market within the study area.

6.67 It should also be noted that the Pi-on model seeks simply to quantify the expansion of the market resulting from the new casinos. As such it does not account for year on year growth stemming from population and expenditure growth.

6.68 To provide a full picture of how the market may evolve we have applied the factor of growth resulting from the Pion model to Experian’s nationally sourced data on the current level of gambling expenditure.

Table 6.19: Future Casino Spend

Year	Total Population	Existing Casino Expenditure £ (m)	Anticipated Casino Expenditure £ (m)
2006	650.2	7.7	27.9
2011	672.7	7.9	28.9
2016	695.6	8.2	29.9
2021	719.5	8.5	30.9

Notes:

Anticipated Casino Expenditure assumed at factor of 3.64

6.69 On this basis it is anticipated that following deregulation casino expenditure within the study area will grow to £27.9 million, and that as a result of year on year growth the level of expenditure, from within the study area, in casinos will exceed £30 million by 2021 (Table 6.19). This assessment is based on existing levels of growth. It is anticipated that following deregulation casino's will be able to establish themselves as a mainstream leisure activity and as such the annual growth in casino expenditure is likely to exceed that of the last five years. On the basis of this assessment it is evident that there is sufficient expenditure capacity in North Essex to justify the development of new casino facilities, given that the four authorities currently contain no Casino facilities.

iii) Restaurant/Café Expenditure

6.70 According to Experian Business Solutions (2003), the average person spends £998 per annum in restaurants/cafes. Experian also estimate that people's average likely spend on leisure goods such as eating out increases by 2% each annum. Currently the total spend available for restaurant/cafés in the study area is £617.5 million, increasing to £919.7 million in 2021, as identified in Table 6.20.

Table 6.20: Restaurant / Café Expenditure Forecasts – Total Study Area

Projection	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
Total Study Area	617,552	705,382	805,379	919,741

Source: Experian Business Solutions, Emarketer, 2004

6.71 On this basis, our assessment highlights sufficient growth in the study area to sustain a circa 33% growth in this sector. Clearly the profile of the catchment population, in relation to the proportion of ABs, will determine the location, scale and quality of restaurants/cafés in the four authorities.

SUMMARY

6.72 We have undertaken economic capacity projections for convenience and comparison retailing and commercial leisure activities. In each case, we have examined capacity by centre, by authority and global capacity for the North Essex sub-region.

6.73 Our analysis indicates that the total population of the survey area is forecast to grow from 639,371 in 2006 to 691,921 by 2021 – a strong increase of 8%. Convenience goods expenditure is expected to increase from £1,038m in 2006 to £1,248m by 2021. In the comparison sector, higher growth rates illustrate that spending will increase from £1,704m in 2006 to £3,468m by 2021 – an overall growth of £1,764m (over 100%).

6.74 In terms of global capacity projections, our analysis has identified comparison goods capacity of 87,389 sq m net by 2021; and 7,918 sq m net of convenience goods expenditure capacity by 2021. Colchester has the greatest capacity for additional comparison goods floorspace – 59,642 sq m net by 2021; followed by Braintree - 10,020 sq m net; Tendring – 14,203 sq m net and Maldon – 2,505 sq m net. In the convenience sector, Colchester has capacity for 7,796 sq m net of additional floorspace by 2021; followed by Tendring – 1,973 sq m net; Braintree – 1,780 sq m net; and –405 sq m in Maldon.

6.75 In the case of Colchester, our survey indicates that the centre is currently achieving a very high turnover measured in terms of comparison turnover per sq m. This is consistent with the conclusions of our health check that the centre is trading strongly, but has a substantial latent capacity for new development as of now. In these circumstances, our capacity projections for Colchester should be regarded as being conservative.

6.76 Total expenditure on leisure goods in North Essex is currently £1.057 billion, and predicted to increase to £1.574 billion by 2021, an overall growth of approximately £517m or about 32.8% in the baseline scenario. Within these global estimates the main commercial leisure elements which are potentially of strategic significance and likely to underpin plans for the centres are cinemas and, following deregulation of the gaming industry, the potential for new casino facilities.

6.77 In our baseline scenario we estimate a current capacity for circa 12 cinema screens within North Essex, increasing to 34 by 2021. We anticipate significant potential to incorporate further cinema provision to meet identified deficiencies to supplement existing facilities in all the sub regional centres.

6.78 At present, there are no casinos in North Essex. With the effect of population growth and deregulation we estimate that expenditure for the casino sector will increase to circa £31m by 2021. This suggests that there is scope for additional casino provision leading up to 2021.

6.79 In the restaurant/café sector, we estimate growth of circa 33% in the catchment area. We envisage that this will help sustain significant growth in the scale and quality of eating/drinking facilities within the key centres of North Essex.

7. RECOMMENDED STRATEGY

7.1 Drawing on the preceding analysis, we recommend that the North Essex Authorities collectively redefine the retail hierarchy to reflect the current and future role of established town and district centres and provide a basis for developing detailed planning policies and proposals for each centre.

7.2 The overarching strategy of each authority should reflect the guidance in PPS6 – notably that the identification of new sites, and determination of any proposals should have regard to matters of need/appropriateness of scale, the sequential approach and impact. Reflecting the advice in PPS6, we recommend that the authorities adopt a positive and proactive approach to making provision to accommodate new retail and other main town centre uses within existing centres, where necessary identifying sites and opportunities within existing or expanded town centre boundaries. The authorities also need to balance recognition of the current retail hierarchy, and continued dominance of Colchester and the other larger town centres, against a strategy to seek to retain and enhance local convenience, comparison and service provision within smaller centres in order to achieve a sustainable network of centres and reduce the need to travel. This requires realism on the part of the local authorities.

7.3 Our capacity projections identify significant current and future capacity for additional comparison shopping floorspace in Colchester, based on its current market share and dominant position within the sub region. Our capacity projections for further significant comparison shopping floorspace in the other centres are more modest, again reflecting their lower market share. Based on global capacity within the sub region, there is potential for the other town and district centres to increase their share of available comparison goods expenditure, provided they are able to identify suitable sites and opportunities capable of attracting retailer demand and supporting development which genuinely adds to, rather than duplicates their current retail offer. For the reasons outlined earlier in this report, this presents significant challenges in the case of the smaller centres based on national market trends and current retailer demand the relatively limited and generally constrained development opportunities within and on the edge of existing centres.

7.4 In the case of convenience goods floorspace, our capacity analysis identifies scope for new and improved convenience shopping provision in Colchester and a number of the other defined centres. Again wherever possible we recommend that convenience shopping needs are met by the provision of new or improved stores within and on the edge of defined town and district centres in the first instance. In circumstances where identified convenience shopping needs cannot be met within or on the edge of defined centres, it may be appropriate to consider expansion/redevelopment of existing out of centre facilities and/or the development of new stores to function as new district centres serving existing expanded residential areas in order to promote a more sustainable network of convenience shopping facilities. In each case, however, it will be necessary to consider carefully the potential impact of emerging new or enhanced out of centre convenience shopping facilities given the critical importance of this sector to underpinning the role of the North Essex Town and District Centres.

7.5 In the commercial leisure sector, we have identified significant potential on new development of key leisure uses e.g. multiplex cinema, health and fitness and anticipate continued growth in expenditure on eating and drinking will support the development of the evening economy in Colchester and the other defined town and district centres. While we anticipate mainstream commercial leisure requirements such as cinemas will gravitate towards Colchester and the other strong town centres e.g. Clacton and Braintree and the coastal towns, growth in consumer expenditure on eating and drinking provides an opportunity to supplement the traditional convenience and local services role of the smaller town and district centres within the North Essex area and to underpin the rural economy.

BENCHMARKING

7.6 Drawing on our detailed review of the retail hierarchy in North Essex we have benchmarked the centres against a range of indicators to assess their relative position and role. This aims to override existing definitions set out within the respective Local Plans and enables us to set out what we consider to be an appropriate retail hierarchy in accordance with definitions outlined in PPS6. The outcome is a consistent baseline position with which to put forward our recommendations for new development and the network of centres over the forthcoming LDF periods, setting out any changes in the hierarchy.

7.7 The indicators used are as follows:

1. Catchment population;
2. Shopping population;
3. Shopping population as a % of catchment population;
4. Comparison goods turnover;
5. Retailer requirements;
6. Amount of comparison goods floorspace;
7. Amount of convenience goods floorspace;
8. Total retail floorspace.

7.8 The aim of this analysis is to give an indication of the relative performance, size and attraction of each centre to enable an informed decision regarding their designations within the North Essex retail hierarchy. As such, the greater the amount of floorspace, retailer requirements and catchment/shopping populations, the higher the rank order. Given the attraction of the factory outlet villages in Braintree and Clacton we have ranked the town centres on their own as well as combined with the factory outlet villages to give a realistic guide to the overall attraction to higher order retailing in each district.

7.9 Appendix 3 sets out the ranking of the centres on the basis of each indicator. Table 5.1 sets out the results of this analysis and where we believe each centre in North Essex currently sits within the PPS6 definitions of centres.

Table 7.1: Benchmarking of North Essex Centres

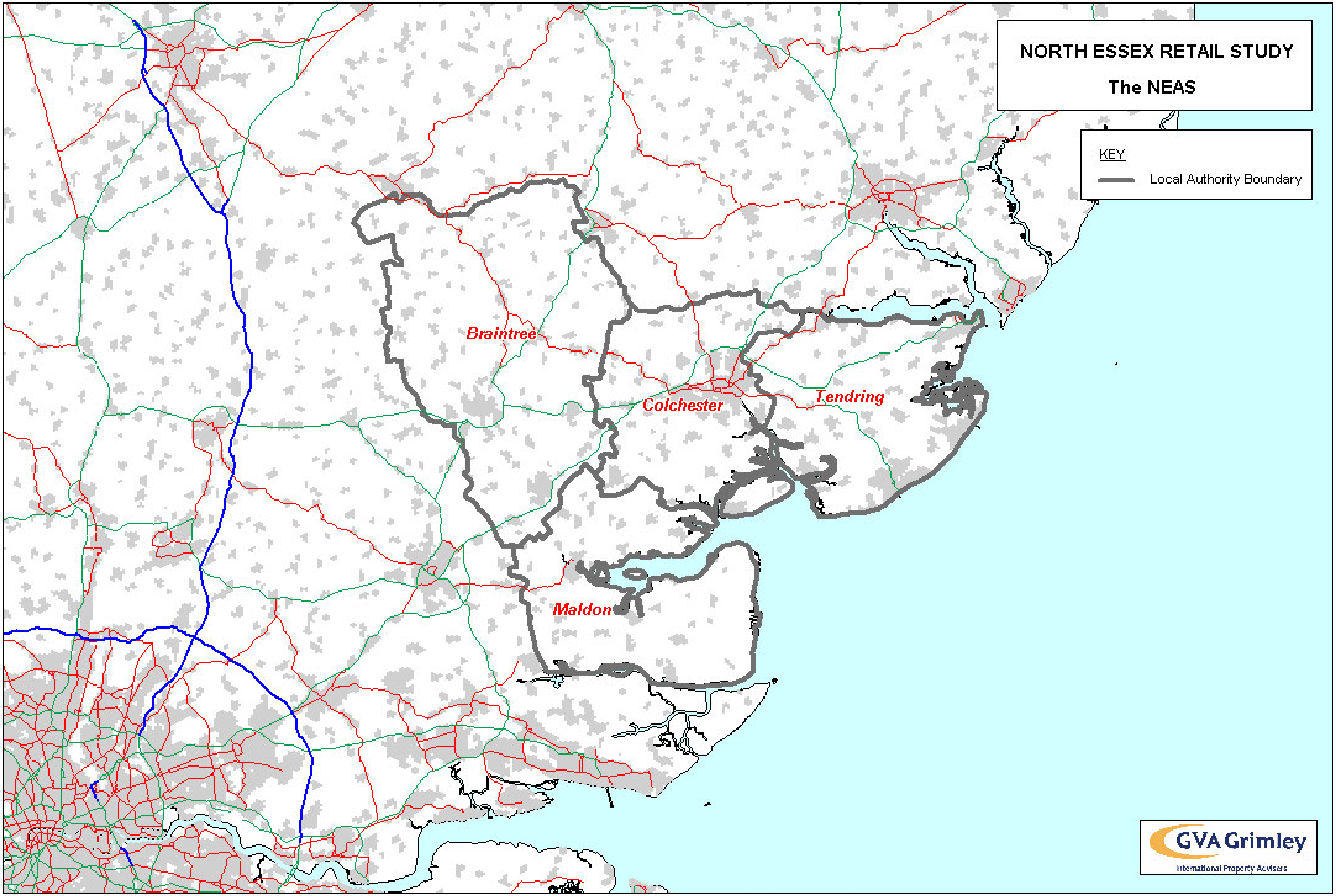
Centre	Rank Score	Rank Position	Current Definition of Centre (PPS6)
Colchester	149	1	Sub-Regional
Braintree & Factory Outlet	139	2	-
Clacton-on-Sea & Factory Outlet	131	3	-
Braintree	127	4	Major Town Centre
Clacton-on-Sea	123	5	Major Town Centre
Maldon	112	6	Town Centre
Witham	101	7	Town Centre
Dovercourt	91	8	Town Centre
Halstead	86	=9	Town Centre
Frinton-on-Sea	86	=9	Town Centre
Harwich	63	11	District Centre
West Mersea	57	12	District Centre
Brightlingsea	55	13	District Centre
Tiptree	50	14	District Centre
Walton-on-the-Naze	38	15	District Centre
Wivenhoe	33	16	District Centre
Burnham-on-Crouch	31	17	District Centre
Manningtree	30	18	District Centre
Bentall Centre, Heybridge	11	19	District Centre

Source: Appendix 3

7.10 Within this overall hierarchy and the overarching policies outlined above, we consider each authority needs to develop its detailed policies and town centre strategy through the LDF process, and set out its policies and specific site allocations in the forthcoming core strategy and/or Area Action Plans/supplementary planning documents for the defined town centres. We set out our detailed recommendations for each authority in the Stage 2 reports.

PLAN 1

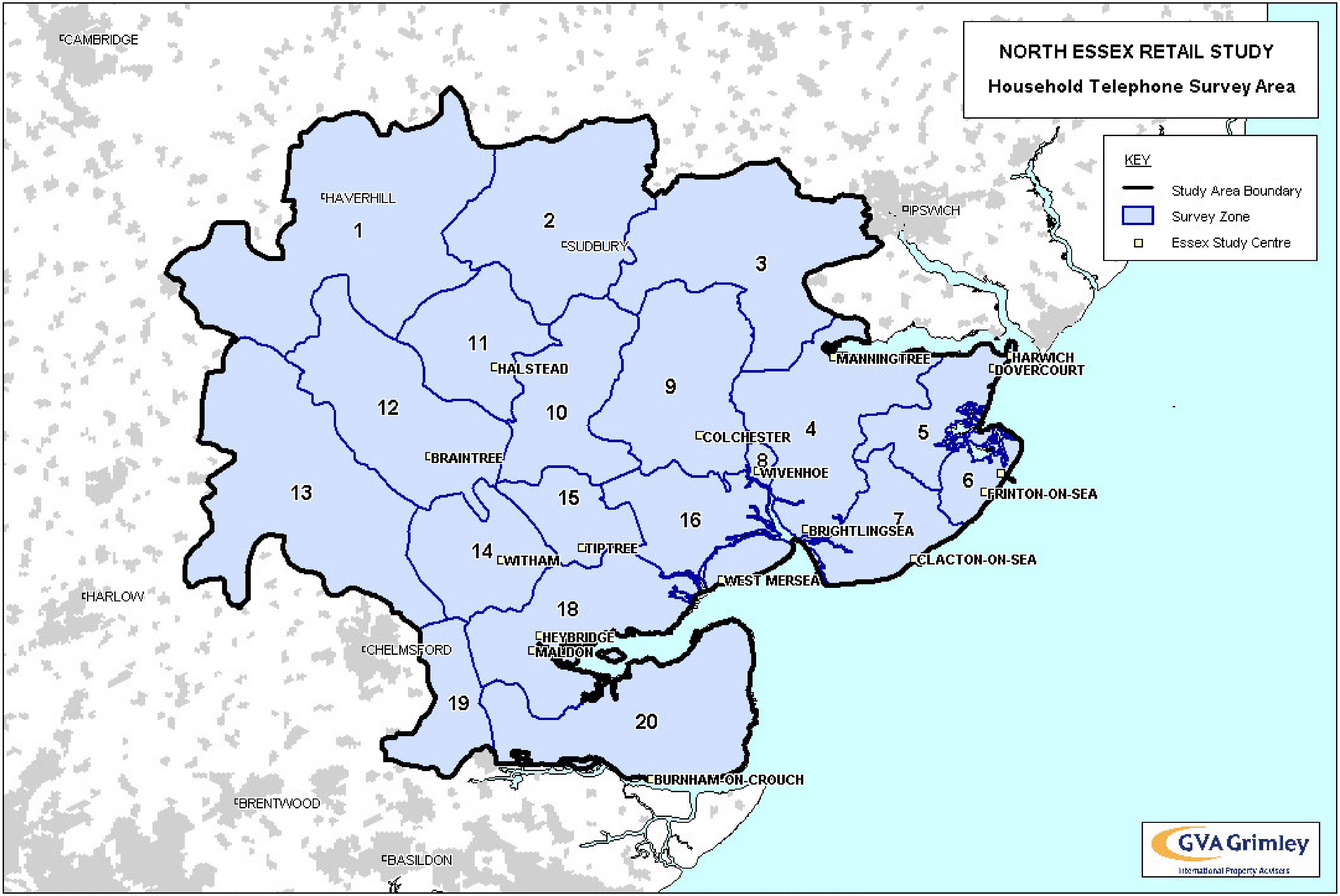
NORTH ESSEX STUDY AREA PLAN



NORTH ESSEX RETAIL STUDY
The NEAS
KEY
Local Authority Boundary
Braintree
Colchester
Tendring
Maldon
GVA Grimley
International Property Advisers

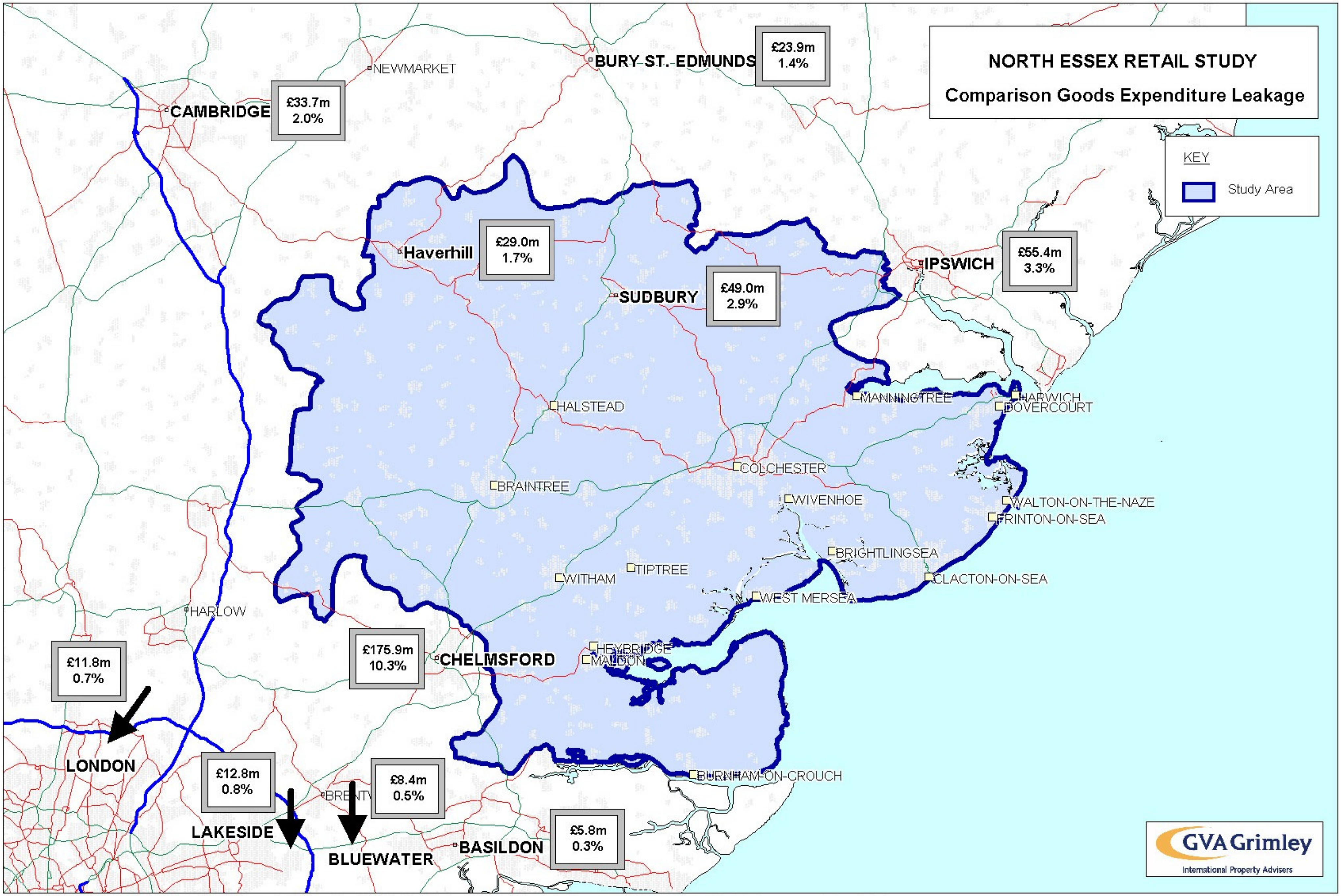
PLAN 2

HOUSEHOLD TELEPHONE SURVEY AREA


NORTH ESSEX RETAIL STUDY
Household Telephone Survey Area
KEY
Study Area Boundary
Survey Zone
Essex Study Centre
CAMBRIDGE
HAVERHILL
SUDBURY
IPSWICH
HALSTEAD
BRAINTREE
COLCHESTER
MANNINGTREE
HARWICH
DOVERCOURT
WIVENHOE
FRINTON-ON-SEA
BRIGHTLINGSEA
CLACTON-ON-SEA
TIPTREE
WITHAM
WEST MERSEA
HARLOW
CHELMSFORD
HEYBRIDGE
MALDON
BURNHAM-ON-CROUCH
BRENTWOOD
BASILDON
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
18
19
20
GVA Grimley
International Property Advisers

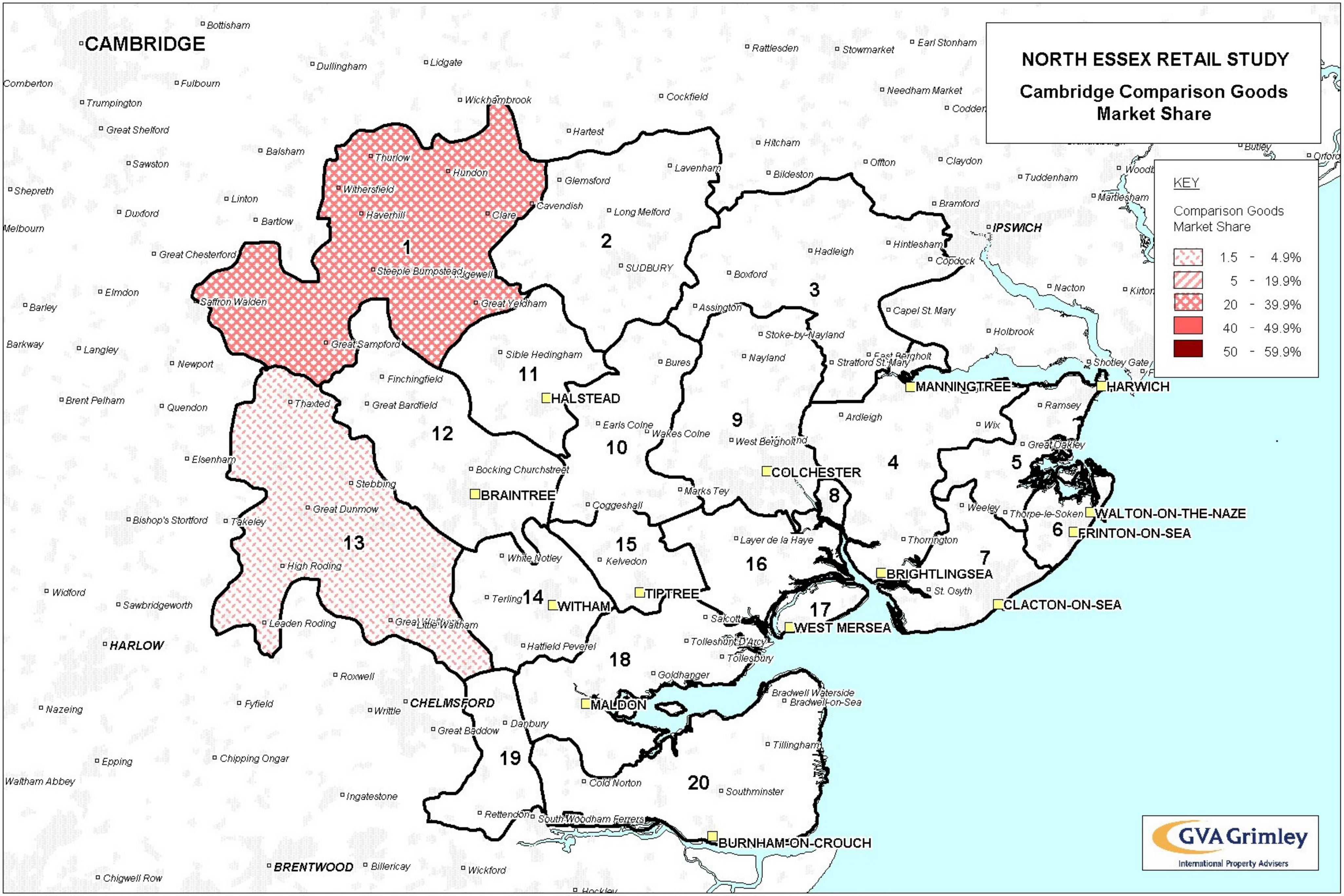
PLAN 3

COMPARISON GOODS EXPENDITURE LEAKAGE TO COMPETING CENTRES


NORTH ESSEX RETAIL STUDY
Comparison Goods Expenditure Leakage
KEY
Study Area
CAMBRIDGE
£33.7m
2.0%
NEWMARKET
BURY ST. EDMUNDS
£23.9m
1.4%
Haverhill
£29.0m
1.7%
SUDBURY
£49.0m
2.9%
IPSWICH
£55.4m
3.3%
HALSTEAD
MANNINGTREE
HARWICH
DOVERCOURT
COLCHESTER
BRAINTREE
WIVENHOE
WALTON-ON-THE-NAZE
FRINTON-ON-SEA
BRIGHTLINGSEA
TIPTREE
WITHAM
CLACTON-ON-SEA
WEST MERSEA
HARLOW
£175.9m
10.3%
CHELMSFORD
HEYBRIDGE
MALDON
£11.8m
0.7%
LONDON
£12.8m
0.8%
LAKESIDE
BRENTWOOD
£8.4m
0.5%
BLUEWATER
BASILDON
£5.8m
0.3%
BURNHAM-ON-CROUCH
GVA Grimley
International Property Advisers

PLAN 4

CAMBRIDGE COMPARISON GOODS MARKET SHARE


NORTH ESSEX RETAIL STUDY
Cambridge Comparison Goods Market Share
KEY
Comparison Goods Market Share
1.5 - 4.9%
5 - 19.9%
20 - 39.9%
40 - 49.9%
50 - 59.9%
GVA Grimley
International Property Advisers
CAMBRIDGE
IPSWICH
HARLOW
CHELMSFORD
BRENTWOOD
SUDBURY
HALSTEAD
BRAINTREE
WITHAM
TIPTREE
COLCHESTER
MANNINGTREE
HARWICH
WALTON-ON-THE-NAZE
FRINTON-ON-SEA
BRIGHTLINGSEA
CLACTON-ON-SEA
WEST MERSEA
MALDON
BURNHAM-ON-CROUCH
Saffron Walden
Haverhill
Great Dunmow
Thaxted
Bishop's Stortford
Coggeshall
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20

PLAN 5

BASILDON COMPARISON GOODS MARKET SHARE


NORTH ESSEX RETAIL STUDY
Basildon Comparison Goods Market Share
KEY
Comparison Goods Market Share
1.5 - 4.9%
5 - 19.9%
20 - 39.9%
40 - 49.9%
50 - 59.9%
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20
HALSTEAD
BRAINTREE
COLCHESTER
MANNINGTREE
HARWICH
WALTON-ON-THE-NAZE
FRINTON-ON-SEA
BRIGHTLINGSEA
CLACTON-ON-SEA
WEST MERSEA
TIPTREE
WITHAM
MALDON
BURNHAM-ON-CROUCH
IPSWICH
SUDBURY
CHELMSFORD
HARLOW
BRENTWOOD
BASILDON
FELIXSTOWE
Fulbourn
Trumpington
Great Shelford
Sawston
Balsham
Linton
Duxford
Bartlow
Great Chesterford
Elmdon
Saffron Walden
Langley
Newport
Brent Pelham
Quendon
Thaxted
Elsenham
Bishop's Stortford
Takeley
Sawbridgeworth
Epping
Chigwell Row
Romford
Wickhambrook
Thurlow
Hundon
Withersfield
Haverhill
Clare
Cavendish
Steeple Bumpstead
Great Yeldham
Great Sampford
Sible Hedingham
Finchingfield
Great Bardfield
Stebbing
Great Dunmow
High Roding
Leaden Roding
Little Waltham
Roxwell
Fyfield
Writtle
Chipping Ongar
Ingatestone
Billericay
Wickford
Hockley
Rayleigh
Rochford
Cockfield
Hartest
Lavenham
Glemsford
Long Melford
Hitcham
Bildeston
Needham Market
Coddenham
Otley
Wickham Market
Aldeburgh
Offton
Claydon
Tuddenham
Bramford
Hintlesham
Hadleigh
Copdock
Boxford
Assington
Stoke-by-Nayland
Nayland
Bures
Capel St. Mary
Holbrook
East Bergholt
Stratford St. Mary
Nacton
Kirton
Shotley Gate
Ramsey
Wix
Great Oakley
Ardleigh
Earls Colne
Wakes Colne
West Bergholt
Bocking Churchstreet
Marks Tey
Coggeshall
Kelvedon
White Notley
Terling
Hatfield Peverel
Layer de la Haye
Weeley
Thorpe-le-Soken
Thorrington
St. Osyth
Salcott
Tolleshunt D'Arcy
Tollesbury
Goldhanger
Bradwell Waterside
Bradwell-on-Sea
Tillingham
Southminster
Cold Norton
Danbury
Great Baddow
Rettendon
South Woodham Ferrers
GVA Grimley
International Property Advisers

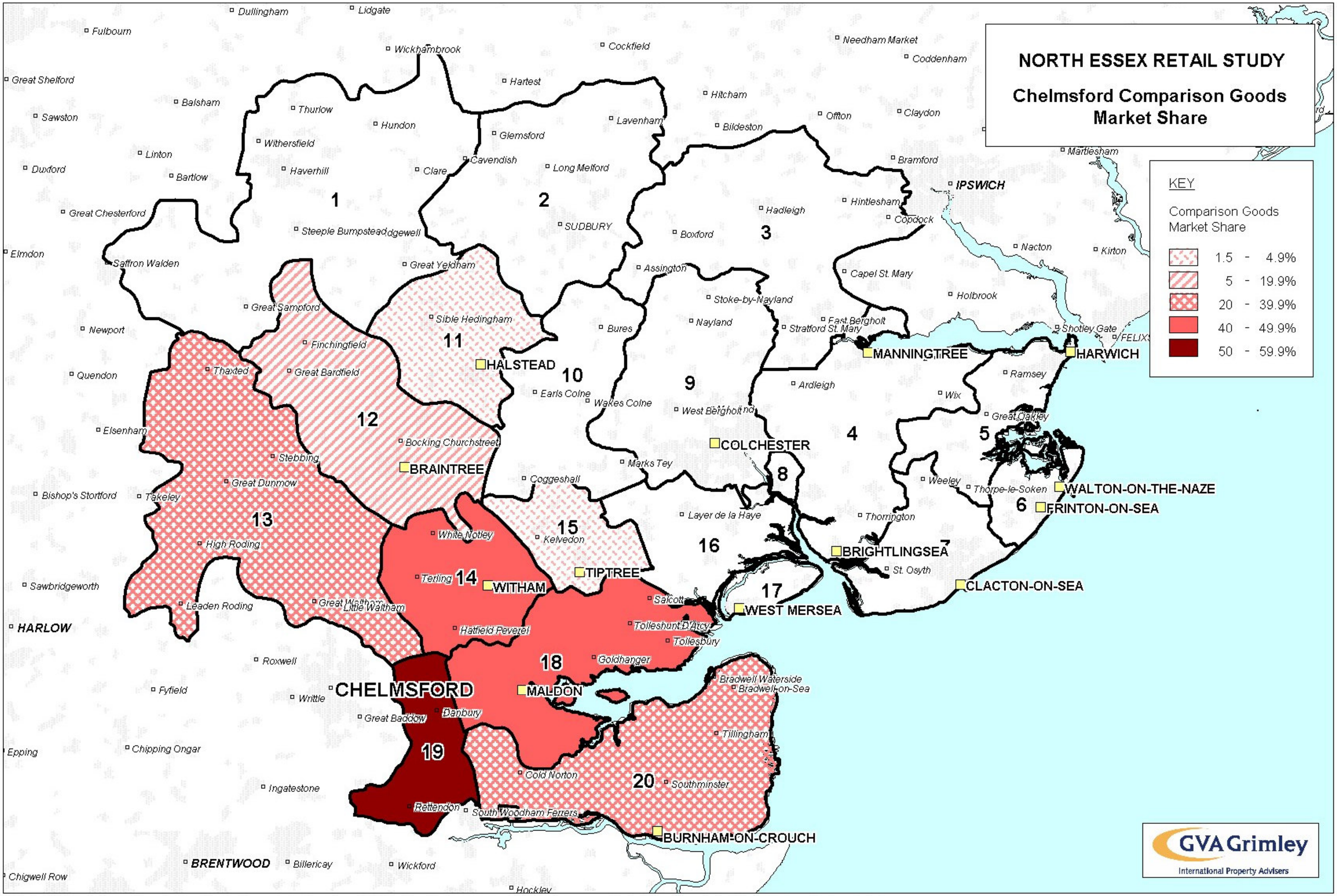
PLAN 6

IPSWICH COMPARISON GOODS MARKET SHARE

NORTH ESSEX RETAIL STUDY
Ipswich Comparison Goods Market Share
KEY
Comparison Goods Market Share
1.5 - 4.9%
5 - 19.9%
20 - 39.9%
40 - 49.9%
50 - 59.9%
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20
IPSWICH
SUDBURY
HALSTEAD
BRAINTREE
COLCHESTER
MANNINGTREE
HARWICH
FELIXSTOWE
WALTON-ON-THE-NAZE
FRINTON-ON-SEA
BRIGHTLINGSEA
CLACTON-ON-SEA
WEST MERSEA
TIPTREE
WITHAM
CHELMSFORD
MALDON
BURNHAM-ON-CROUCH
BRENTWOOD
HARLOW
Dullingham
Lidgate
Fulbourn
Wickhambrook
Cockfield
Needham Market
Otley
Coddenham
Great Shelford
Hartest
Hitcham
Offton
Claydon
Balsham
Thurlow
Lavenham
Bildeston
Tuddenham
Sawston
Hundon
Glemsford
Martlesham
Withersfield
Cavendish
Bramford
Linton
Haverhill
Clare
Long Melford
Duxford
Bartlow
Hadleigh
Hintlesham
Great Chesterford
Copdock
Steeple Bumpstead
Boxford
Nacton
Kirton
Elmdon
Saffron Walden
Great Yeldham
Assington
Capel St. Mary
Stoke-by-Nayland
Holbrook
Great Sampford
Sible Hedingham
Bures
Nayland
East Bergholt
Stratford St. Mary
Shotley Gate
Newport
Finchingfield
Thaxted
Great Bardfield
Ardleigh
Ramsey
Quendon
Earls Colne
Wix
Wakes Colne
West Bergholt
Great Oakley
Elsenham
Bocking Churchstreet
Stebbing
Marks Tey
Weeley
Great Dunmow
Coggeshall
Thorpe-le-Soken
Bishop's Stortford
Takeley
Layer de la Haye
Thorrington
White Notley
Kelvedon
High Roding
Terling
St. Osyth
Sawbridgeworth
Salcott
Leaden Roding
Great Waltham
Little Waltham
Hatfield Peverel
Tolleshunt D'Arcy
Tollesbury
Roxwell
Goldhanger
Bradwell Waterside
Bradwell-on-Sea
Fyfield
Writtle
Danbury
Great Baddow
Tillingham
Epping
Chipping Ongar
Cold Norton
Southminster
Ingatestone
Rettendon
South Woodham Ferrers
Billericay
Wickford
Chigwell Row
Hockley
GVA Grimley
International Property Advisers

PLAN 7

CHELMSFORD COMPARISON GOODS MARKET SHARE


NORTH ESSEX RETAIL STUDY
Chelmsford Comparison Goods Market Share
KEY
Comparison Goods Market Share
1.5 - 4.9%
5 - 19.9%
20 - 39.9%
40 - 49.9%
50 - 59.9%
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20
CHELMSFORD
COLCHESTER
BRAINTREE
HALSTEAD
WITHAM
TIPTREE
MALDON
WEST MERSEA
BRIGHTLINGSEA
CLACTON-ON-SEA
FRINTON-ON-SEA
WALTON-ON-THE-NAZE
HARWICH
MANNINGTREE
BURNHAM-ON-CROUCH
SUDBURY
IPSWICH
HARLOW
BRENTWOOD
Dullingham
Lidgate
Fulbourn
Wickhambrook
Cockfield
Needham Market
Coddenham
Great Shelford
Hartest
Hitcham
Balsham
Thurlow
Lavenham
Offton
Claydon
Sawston
Hundon
Glemsford
Bildeston
Withersfield
Linton
Cavendish
Long Melford
Bramford
Martlesham
Duxford
Haverhill
Clare
Bartlow
Hintlesham
Hadleigh
Great Chesterford
Copdock
Steeple Bumpstead
Boxford
Elmdon
Nacton
Kirton
Saffron Walden
Great Yeldham
Assington
Capel St. Mary
Stoke-by-Nayland
Holbrook
Great Sampford
Sible Hedingham
Nayland
East Bergholt
Stratford St. Mary
Shotley Gate
Newport
Bures
Finchingfield
Thaxted
Great Bardfield
Earls Colne
Ardleigh
Ramsey
Quendon
Wakes Colne
West Bergholt
Wix
Great Oakley
Elsenham
Bocking Churchstreet
Stebbing
Marks Tey
Great Dunmow
Coggeshall
Weeley
Thorpe-le-Soken
Bishop's Stortford
Takeley
Layer de la Haye
Thorrington
White Notley
Kelvedon
High Roding
St. Osyth
Terling
Sawbridgeworth
Salcott
Leaden Roding
Great Waltham
Little Waltham
Hatfield Peverel
Tolleshunt D'Arcy
Tollesbury
Roxwell
Goldhanger
Bradwell Waterside
Bradwell-on-Sea
Fyfield
Writtle
Great Baddow
Danbury
Tillingham
Epping
Chipping Ongar
Cold Norton
Southminster
Ingatestone
Rettendon
South Woodham Ferrers
Billericay
Wickford
Chigwell Row
Hockley
GVA Grimley
International Property Advisers

PLAN 8

SUDBURY COMPARISON GOODS MARKET SHARE


NORTH ESSEX RETAIL STUDY
Sudbury Comparison Goods Market Share
KEY
Comparison Goods Market Share
1.5 - 4.9%
5 - 19.9%
20 - 39.9%
40 - 49.9%
50 - 59.9%
SUDBURY
HALSTEAD
BRAINTREE
COLCHESTER
MANNINGTREE
HARWICH
WALTON-ON-THE-NAZE
FRINTON-ON-SEA
BRIGHTLINGSEA
CLACTON-ON-SEA
WEST MERSEA
TIPTREE
WITHAM
MALDON
BURNHAM-ON-CROUCH
CHELMSFORD
CAMBRIDGE
IPSWICH
HARLOW
BRENTWOOD
FELIXSTOWE
GVA Grimley
International Property Advisers

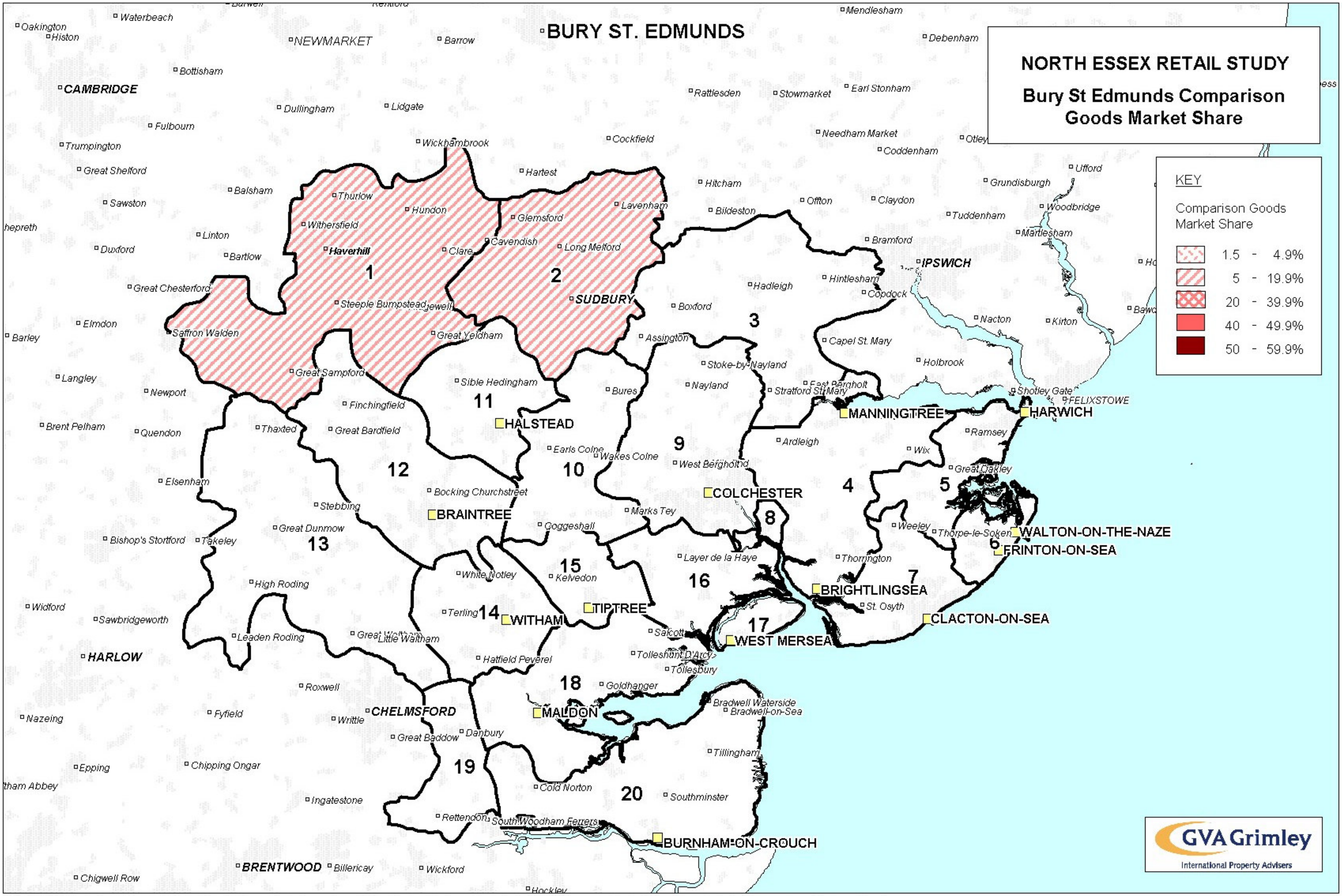
PLAN 9

HAVERHILL COMPARISON GOODS MARKET SHARE


NORTH ESSEX RETAIL STUDY
Haverhill Comparison Goods Market Share
KEY
Comparison Goods Market Share
1.5 - 4.9%
5 - 19.9%
20 - 39.9%
40 - 49.9%
50 - 59.9%
GVA Grimley
International Property Advisers
CAMBRIDGE
Bottisham
Dullingham
Lidgate
Fulbourn
Trumpington
Great Shelford
Wickhambrook
Cockfield
Rattlesden
Stowmarket
Earl Stonham
Needham Market
Coddenham
Hartest
Balsham
Sawston
Thurlow
Hundon
Withersfield
Linton
Duxford
Bartlow
Haverhill
Clare
Cavendish
Glemsford
Lavenham
Long Melford
Hitcham
Bildeston
Offton
Claydon
Tuddenham
Woodbridge
Martlesham
Orford
Bramford
IPSWICH
Hintlesham
Copdock
Hadleigh
Great Chesterford
Steeple Bumpstead
SUDBURY
Boxford
Elmdon
Saffron Walden
Great Yeldham
Assington
Capel St. Mary
Nacton
Kirton
Holbrook
Stoke-by-Nayland
Great Sampford
Sible Hedingham
Langley
Newport
Bures
Nayland
East Bergholt
Stratford St. Mary
Shotley Gate
FELIXSTOWE
Finchingfield
MANNINGTREE
HARWICH
Brent Pelham
Quendon
Thaxted
Great Bardfield
HALSTEAD
Ramsey
Ardleigh
Earls Colne
Wakes Colne
Wix
West Bergholt
Great Oakley
Elsenham
Bocking Churchstreet
COLCHESTER
Stebbing
BRAINTREE
Marks Tey
Great Dunmow
Coggeshall
Weeley
Thorpe-le-Soken
WALTON-ON-THE-NAZE
FRINTON-ON-SEA
Bishop's Stortford
Takeley
Layer de la Haye
Thorrington
White Notley
Kelvedon
High Roding
BRIGHTLINGSEA
Widford
St. Osyth
Terling
WITHAM
TIPTREE
CLACTON-ON-SEA
Sawbridgeworth
Leaden Roding
Great Waltham
Little Waltham
Salcott
WEST MERSEA
HARLOW
Hatfield Peverel
Tolleshunt D'Arcy
Tollesbury
Roxwell
Goldhanger
Bradwell Waterside
Bradwell-on-Sea
Fyfield
Writtle
CHELMSFORD
MALDON
Danbury
Great Baddow
Tillingham
Epping
Chipping Ongar
Cold Norton
Southminster
Ingatestone
Rettendon
South Woodham Ferrers
BURNHAM-ON-CROUCH
BRENTWOOD
Billericay
Wickford
Chigwell Row
Hockley
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20

PLAN 10

BURY ST EDMONDS COMPARISON GOODS MARKET SHARE


NORTH ESSEX RETAIL STUDY
Bury St Edmunds Comparison Goods Market Share
KEY
Comparison Goods Market Share
1.5 - 4.9%
5 - 19.9%
20 - 39.9%
40 - 49.9%
50 - 59.9%
GVA Grimley
International Property Advisers
BURY ST. EDMUNDS
NEWMARKET
CAMBRIDGE
IPSWICH
Haverhill
SUDBURY
HALSTEAD
BRAINTREE
COLCHESTER
MANNINGTREE
HARWICH
FELIXSTOWE
WALTON-ON-THE-NAZE
FRINTON-ON-SEA
BRIGHTLINGSEA
CLACTON-ON-SEA
WEST MERSEA
TIPTREE
WITHAM
MALDON
CHELMSFORD
BURNHAM-ON-CROUCH
HARLOW
BRENTWOOD
Saffron Walden
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20

PLAN 11

LONDON COMPARISON GOODS MARKET SHARE

NORTH ESSEX RETAIL STUDY
London Comparison Goods Market Share
KEY
Comparison Goods Market Share
1.5 - 4.9%
5 - 19.9%
20 - 39.9%
40 - 49.9%
50 - 59.9%
LONDON
HALSTEAD
BRAINTREE
COLCHESTER
MANNINGTREE
HARWICH
WALTON-ON-THE-NAZE
FRINTON-ON-SEA
BRIGHTLINGSEA
CLACTON-ON-SEA
WEST MERSEA
TIPTREE
WITHAM
MALDON
BURNHAM-ON-CROUCH
CAMBRIDGE
SUDBURY
IPSWICH
HARLOW
CHELMSFORD
BRENTWOOD
BASILDON
Haverhill
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20
GVA Grimley
International Property Advisers

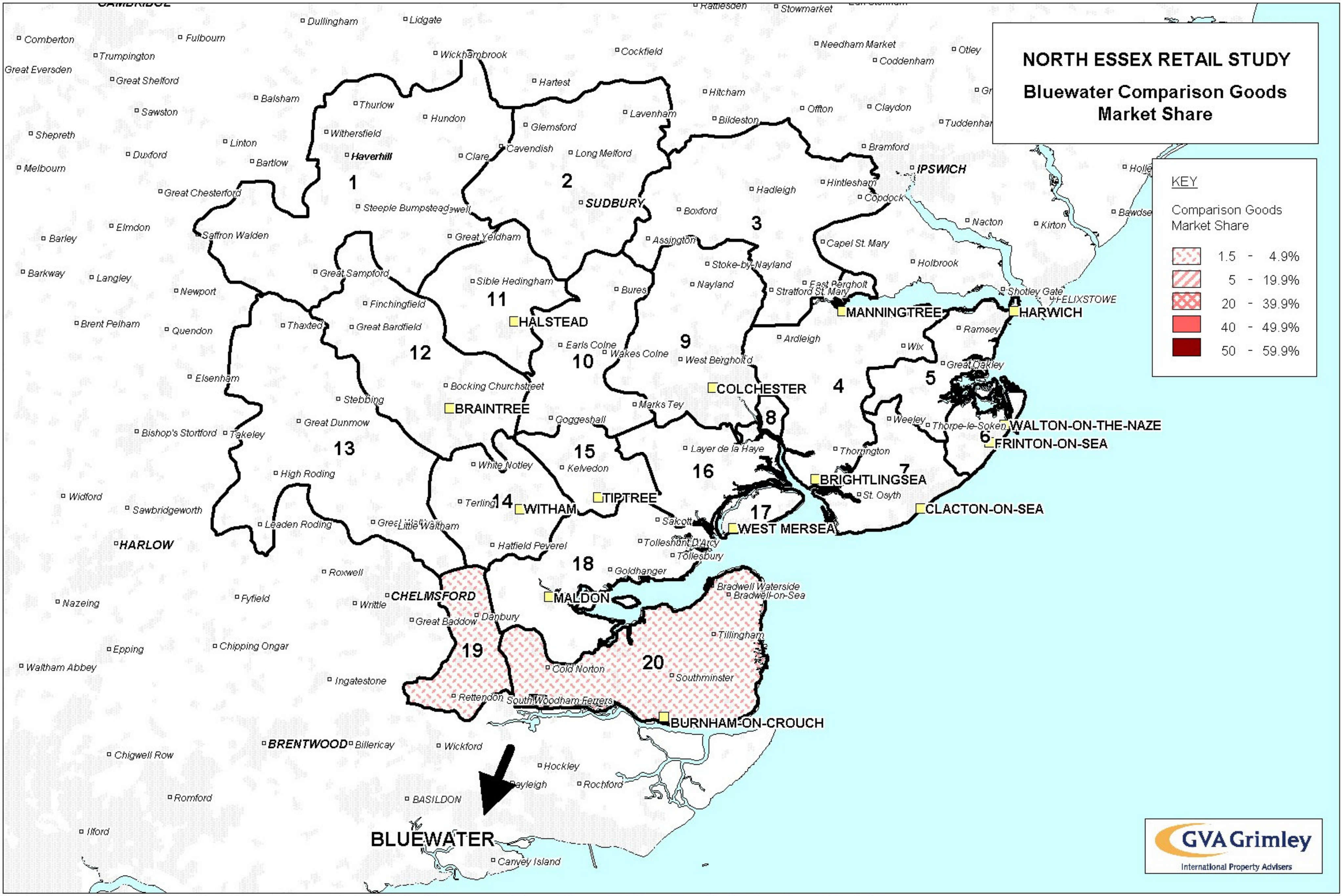
PLAN 12

LAKESIDE COMPARISON GOODS MARKET SHARE


NORTH ESSEX RETAIL STUDY
Lakeside Comparison Goods Market Share
KEY
Comparison Goods Market Share
1.5 - 4.9%
5 - 19.9%
20 - 39.9%
40 - 49.9%
50 - 59.9%
GVA Grimley
International Property Advisers
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20
CAMBRIDGE
Bottisham
Dullingham
Lidgate
Rattlesden
Stowmarket
Earl Stonham
Comberton
Fulbourn
Trumpington
Great Eversden
Wickhambrook
Cockfield
Needham Market
Coddenham
Otley
Great Shelford
Hartest
Balsham
Thurlow
Hitcham
Sawston
Hundon
Lavenham
Offton
Claydon
Withersfield
Glemsford
Bildeston
Tuddenham
Woodbridge
Shepreth
Linton
Cavendish
Bramford
Martlesham
Duxford
Haverhill
Clare
Long Melford
IPSWICH
Melbourn
Bartlow
Hintlesham
Hadleigh
Great Chesterford
SUDBURY
Copdock
Steeple Bumpstead
Boxford
Nacton
Kirton
Bawdsey
Elmdon
Saffron Walden
Great Yeldham
Assington
Capel St. Mary
Barley
Stoke-by-Nayland
Holbrook
Barkway
Langley
Great Sampford
Sible Hedingham
Nayland
Bures
East Bergholt
Stratford St. Mary
Shotley Gate
FELIXSTOWE
Newport
Finchingfield
HALSTEAD
MANNINGTREE
HARWICH
Brent Pelham
Quendon
Thaxted
Great Bardfield
Ardleigh
Ramsey
Earls Colne
Wakes Colne
Wix
West Bergholt
Great Oakley
Elsenham
Bocking Churchstreet
COLCHESTER
Stebbing
Marks Tey
BRAINTREE
Coggeshall
Weeley
Thorpe-le-Soken
WALTON-ON-THE-NAZE
Bishop's Stortford
Takeley
Great Dunmow
Layer de la Haye
Thorrington
FRINTON-ON-SEA
White Notley
Kelvedon
High Roding
BRIGHTLINGSEA
Terling
WITHAM
TIPTREE
St. Osyth
Widford
CLACTON-ON-SEA
Sawbridgeworth
Salcott
Leaden Roding
Little Waltham
WEST MERSEA
HARLOW
Hatfield Peverel
Tolleshunt D'Arcy
Tollesbury
Roxwell
Goldhanger
Fyfield
CHELMSFORD
MALDON
Bradwell Waterside
Bradwell-on-Sea
Nazeing
Writtle
Danbury
Great Baddow
Tillingham
Epping
Chipping Ongar
Waltham Abbey
Cold Norton
Southminster
Ingatestone
Rettendon
South Woodham Ferrers
BURNHAM-ON-CROUCH
BRENTWOOD
Billericay
Wickford
Chigwell Row
Hockley
Rayleigh
Rochford
Romford
BASILDON
LAKESIDE
Ilford
Canvey Island

PLAN 13

BLUEWATER COMPARISON GOODS MARKET SHARE



NORTH ESSEX RETAIL STUDY
Bluewater Comparison Goods Market Share
KEY
Comparison Goods Market Share
1.5 - 4.9%
5 - 19.9%
20 - 39.9%
40 - 49.9%
50 - 59.9%
HALSTEAD
MANNINGTREE
HARWICH
COLCHESTER
BRAINTREE
WALTON-ON-THE-NAZE
FRINTON-ON-SEA
BRIGHTLINGSEA
CLACTON-ON-SEA
TIPTREE
WITHAM
WEST MERSEA
MALDON
BURNHAM-ON-CROUCH
CHELMSFORD
SUDBURY
IPSWICH
HARLOW
BRENTWOOD
BASILDON
BLUEWATER
GVA Grimley
International Property Advisers

PLAN 14

EXISTING RETAIL PROVISION

NORTH ESSEX RETAIL STUDY

Existing Foodstore Provision

KEY

Town Centre Foodstore(s)

Colchester
J.Sainsbury, Culver St/Priory Wk

Tiptree
Tesco, Church Rd

West Mersea
Co-op, Kingsland Rd

Wivenhoe
Co-op, The Avenue

Clacton-on-Sea
Somerfield, High St

Frinton
Co-op, Connaught Ave

Dovercourt
Somerfield, High St

Brightlingsea
Co-op, Station Rd

Manningtree
Co-op, Riverside Ave

Braintree
J.Sainsbury, Tofts Walk
Tesco, Market St
Somerfield, Rayne Rd

Halstead
Somerfield, High St

Witham
Tesco, The Grove Centre

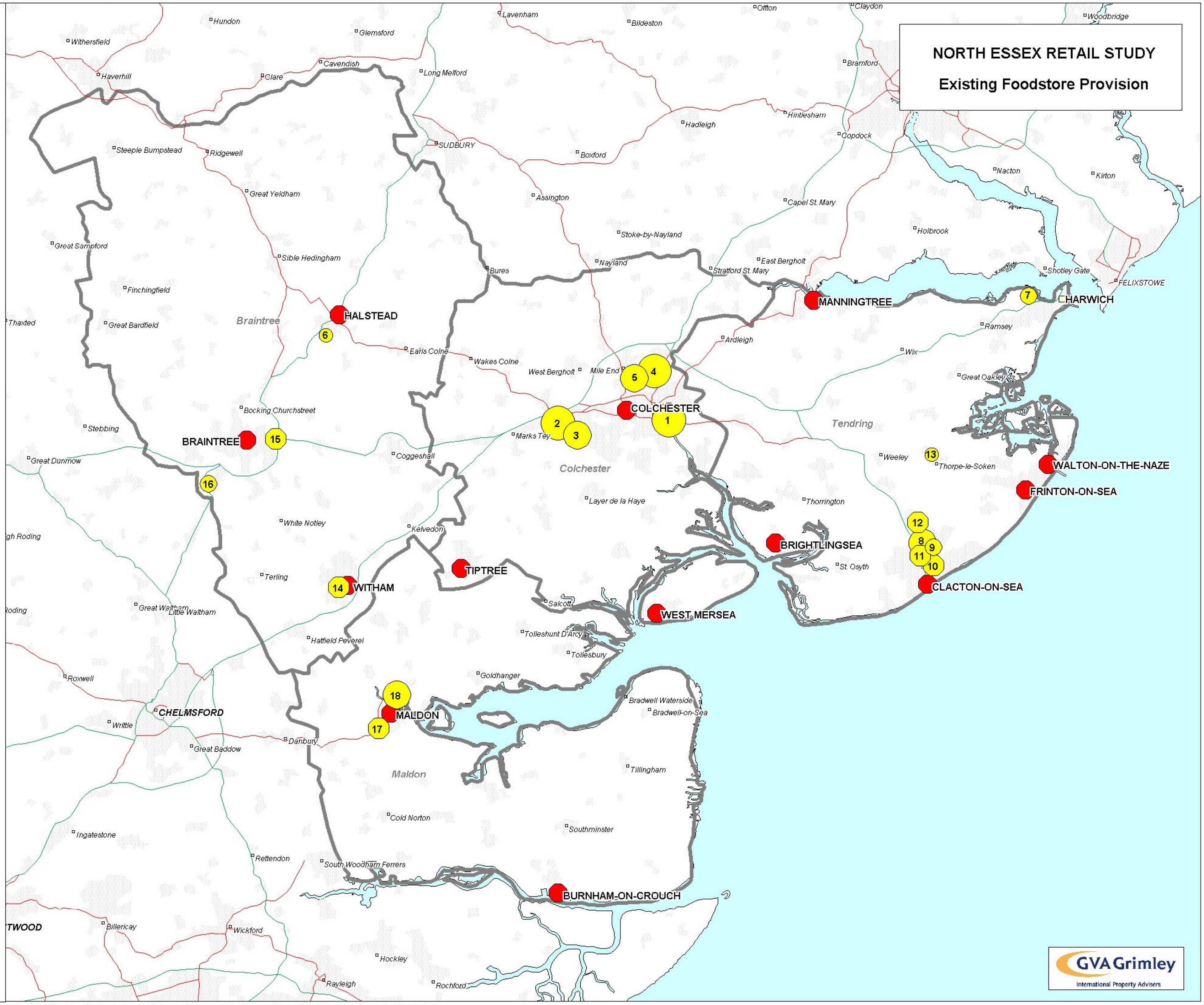
Maldon
Budgens, High St

Burnham-on-Crouch
Co-op, Foundary Lane
Tesco Express, Station Rd

Out-of-Centre Foodstores

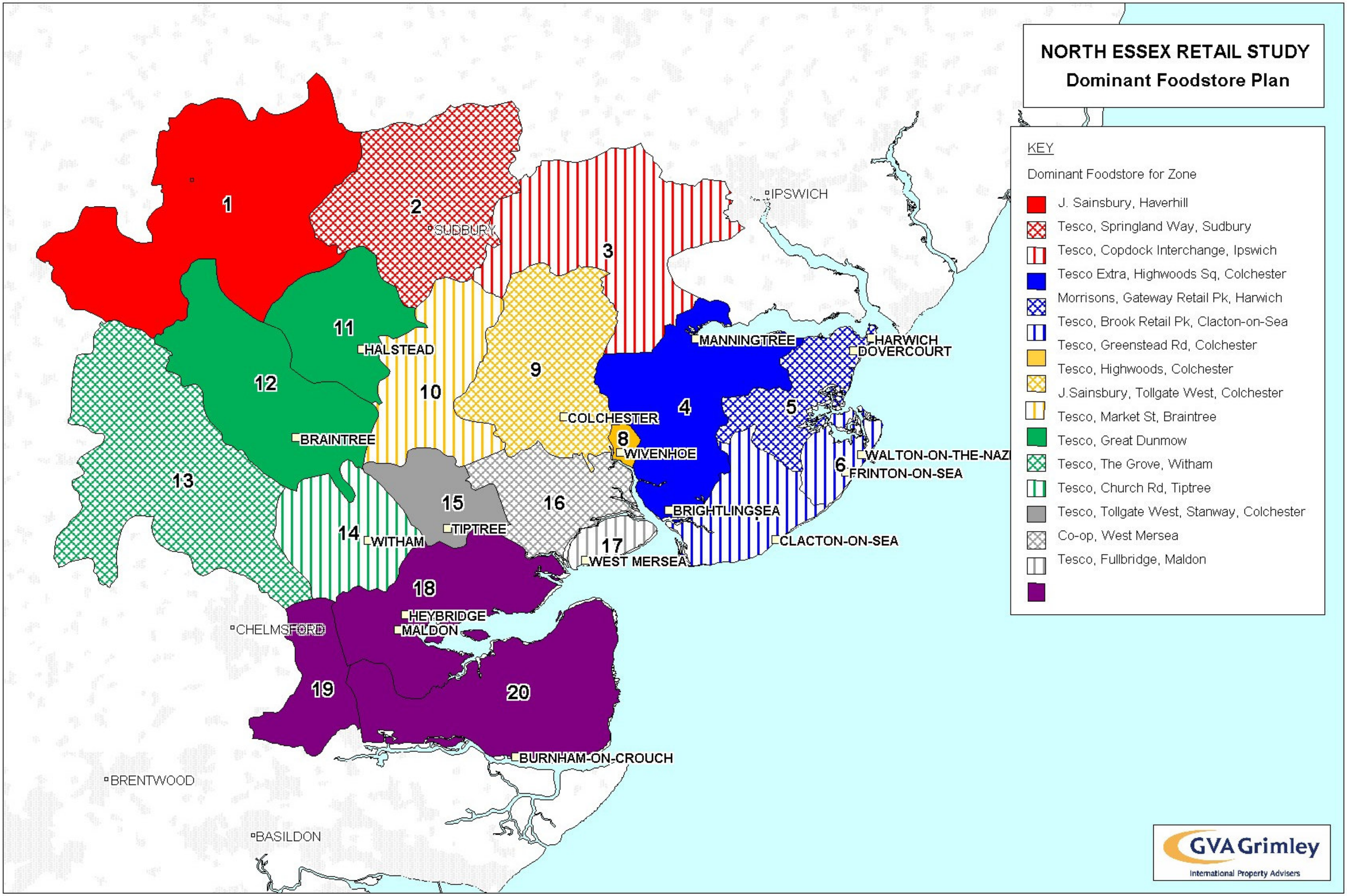
- > 5,000 sqm net
- 3 - 4,000 sqm net
- 2 - 3,000 sqm net
- 1 - 2,000 sqm net
- < 1,000 sqm net

1 Tesco, Greenstead Rd, Colchester
2 J.Sainsbury, Tollgate Rd, Colchester
3 Co-op, Fiveways Retail Pk, Colchester
4 Tesco, Highwoods, Colchester
5 Asda, Turner Rise, Colchester
6 Co-op, Abels Rd, Halstead
7 Morrisons, Gateway Retail Pk, Clacton
8 Tesco, Brook Retail Park, Clacton
9 Somerfield, North Rd, Clacton
10 Co-op, Bull Hill Rd, Clacton
11 Morrisons, Waterglade, Clacton
12 Morrisons, Centenary Way, Clacton
13 Tesco Express, Thorpe Le Soken
14 Morrisons, Braintree Rd, Witham
15 Tesco, Coggeshall Rd, Braintree
16 Tesco, Notley Green, Braintree
17 Morrisons, Limebrook Way, Maldon
18 Tesco, Fulbridge, Maldon



PLAN 15

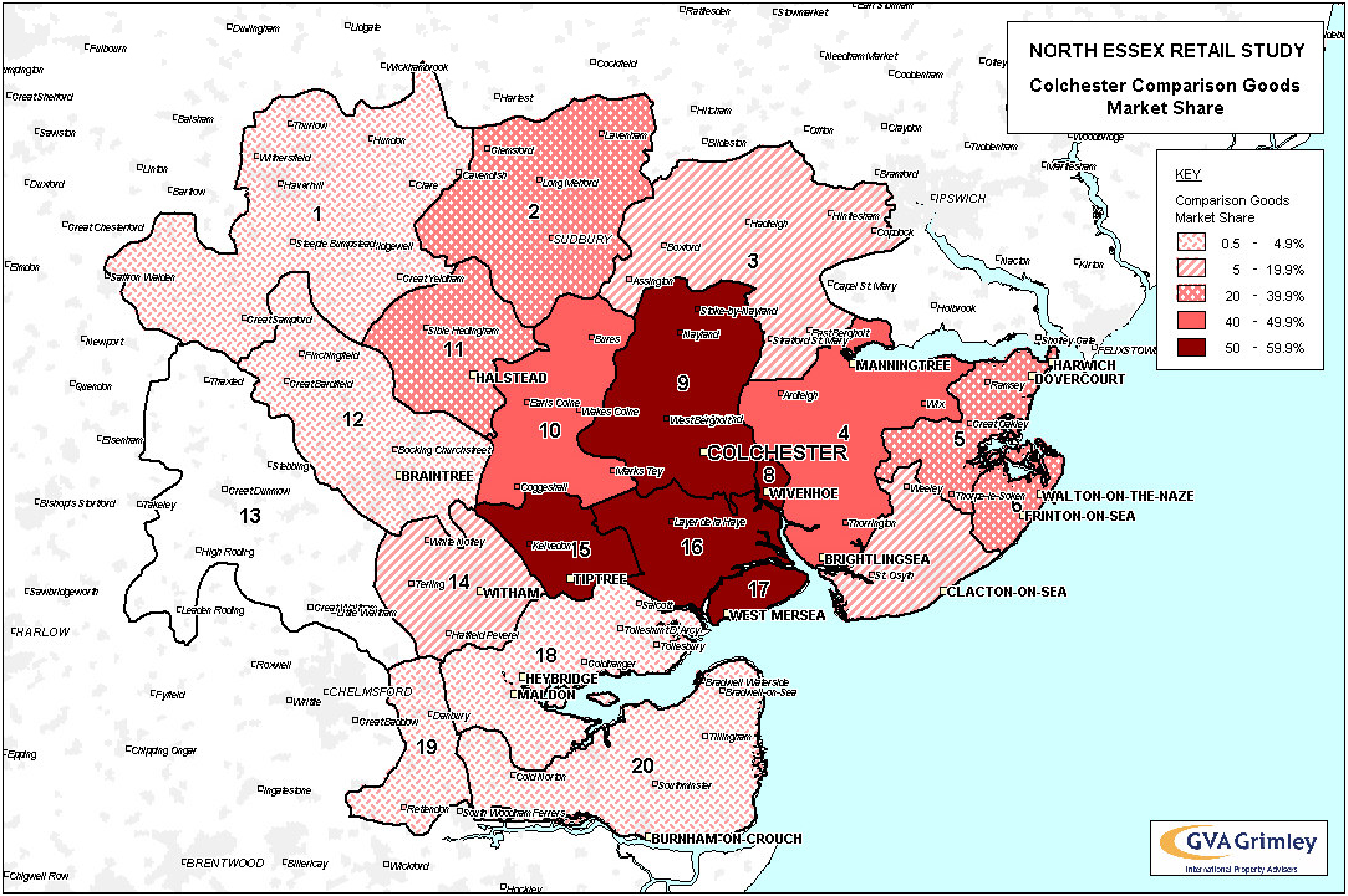
DOMINANT FOODSTORE PLAN



NORTH ESSEX RETAIL STUDY
Dominant Foodstore Plan
KEY
Dominant Foodstore for Zone
J. Sainsbury, Haverhill
Tesco, Springland Way, Sudbury
Tesco, Copdock Interchange, Ipswich
Tesco Extra, Highwoods Sq, Colchester
Morrisons, Gateway Retail Pk, Harwich
Tesco, Brook Retail Pk, Clacton-on-Sea
Tesco, Greenstead Rd, Colchester
Tesco, Highwoods, Colchester
J.Sainsbury, Tollgate West, Colchester
Tesco, Market St, Braintree
Tesco, Great Dunmow
Tesco, The Grove, Witham
Tesco, Church Rd, Tiptree
Tesco, Tollgate West, Stanway, Colchester
Co-op, West Mersea
Tesco, Fullbridge, Maldon
IPSWICH
SUDBURY
HALSTEAD
BRAINTREE
COLCHESTER
WIVENHOE
MANNINGTREE
HARWICH
DOVERCOURT
WALTON-ON-THE-NAZ
FRINTON-ON-SEA
BRIGHTLINGSEA
CLACTON-ON-SEA
TIPTREE
WITHAM
WEST MERSEA
HEYBRIDGE
MALDON
CHELMSFORD
BURNHAM-ON-CROUCH
BRENTWOOD
BASILDON
1
2
3
4
5
6
8
9
10
11
12
13
14
15
16
17
18
19
20
GVA Grimley
International Property Advisers

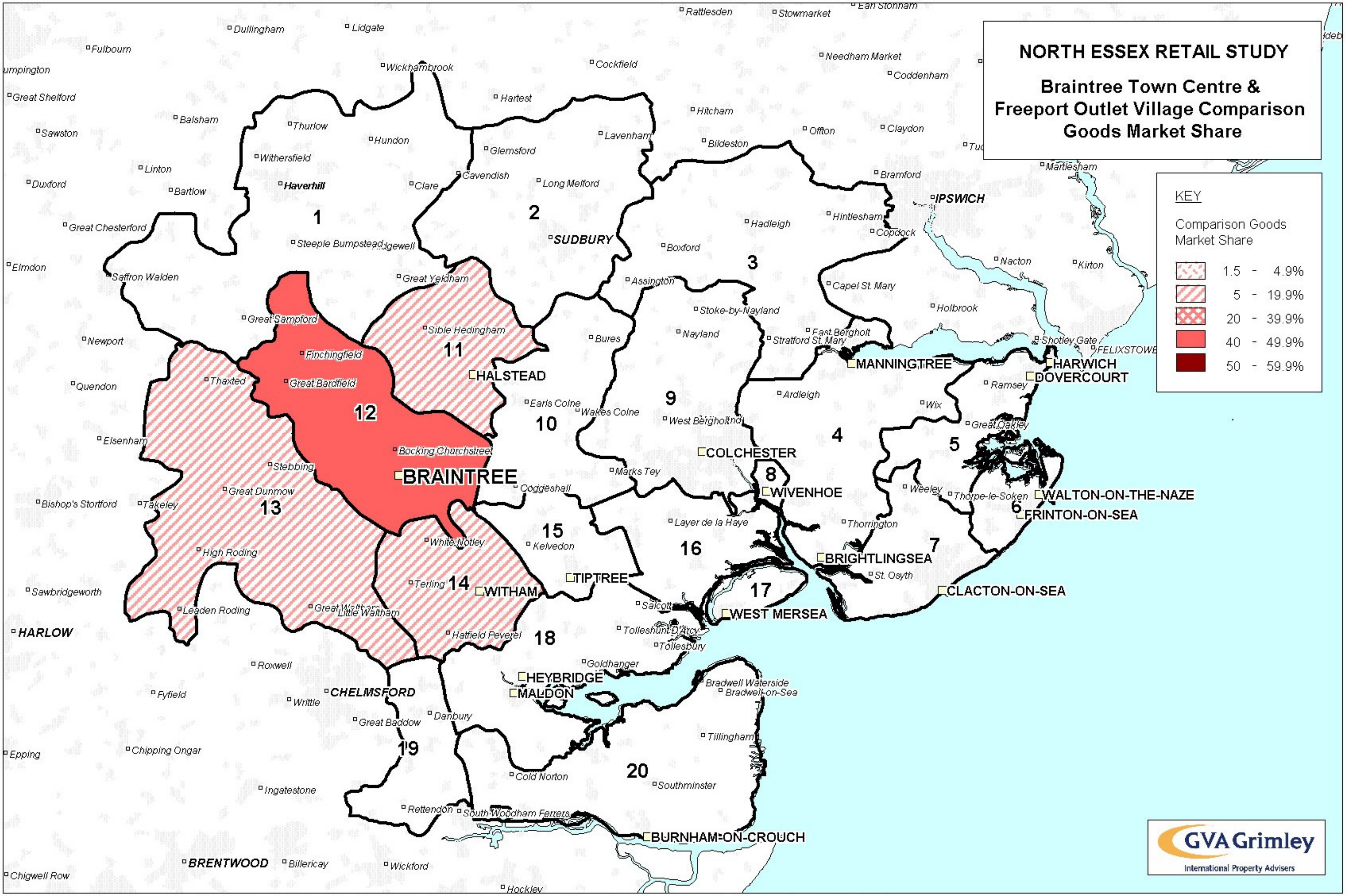
PLAN 16

COLCHESTER COMPARISON GOODS MARKET SHARE


NORTH ESSEX RETAIL STUDY
Colchester Comparison Goods Market Share
KEY
Comparison Goods Market Share
0.5 - 4.9%
5 - 19.9%
20 - 39.9%
40 - 49.9%
50 - 59.9%
COLCHESTER
MANNINGTREE
HARWICH
DOVERCOURT
WIVENHOE
WALTON-ON-THE-NAZE
FRINTON-ON-SEA
BRIGHTLINGSEA
CLACTON-ON-SEA
WEST MERSEA
TIPTREE
WITHAM
BRAINTREE
HALSTEAD
SUDBURY
IPSWICH
HEYBRIDGE
MALDON
CHELMSFORD
BURNHAM-ON-CROUCH
BRENTWOOD
HARLOW
GVA Grimley
International Property Advisors

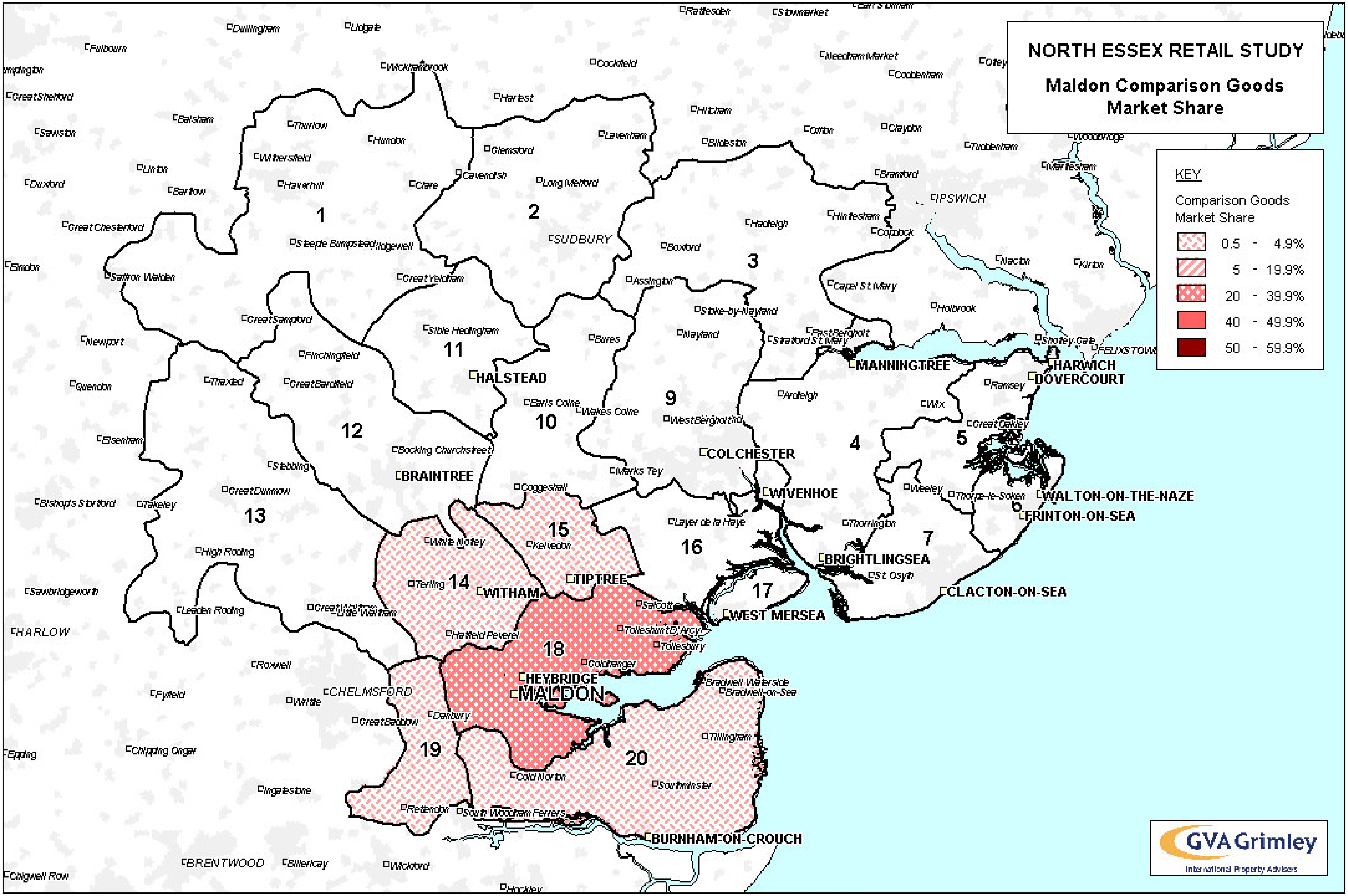
PLAN 17

BRAINTREE COMPARISON GOODS MARKET SHARE (INCLUDING FACTORY OUTLET VILLAGE)


NORTH ESSEX RETAIL STUDY
Braintree Town Centre & Freeport Outlet Village Comparison Goods Market Share
KEY
Comparison Goods Market Share
1.5 - 4.9%
5 - 19.9%
20 - 39.9%
40 - 49.9%
50 - 59.9%
GVA Grimley
International Property Advisers
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20
BRAINTREE
HALSTEAD
WITHAM
COLCHESTER
WIVENHOE
MANNINGTREE
HARWICH
DOVERCOURT
WALTON-ON-THE-NAZE
FRINTON-ON-SEA
BRIGHTLINGSEA
CLACTON-ON-SEA
TIPTREE
WEST MERSEA
HEYBRIDGE
MALDON
BURNHAM-ON-CROUCH
CHELMSFORD
HARLOW
BRENTWOOD
SUDBURY
IPSWICH
FELIXSTOWE
Haverhill
Rattlesden
Stowmarket
Dullingham
Lidgate
Fulbourn
Wickhambrook
Cockfield
Needham Market
Coddenham
Great Shelford
Hartest
Hitcham
Balsham
Thurlow
Lavenham
Offton
Claydon
Sawston
Hundon
Glemsford
Bildeston
Withersfield
Martlesham
Linton
Cavendish
Bramford
Duxford
Clare
Long Melford
Bartlow
Hintlesham
Hadleigh
Great Chesterford
Copdock
Steeple Bumpstead
Boxford
Elmdon
Saffron Walden
Great Yeldham
Nacton
Kirton
Assington
Capel St. Mary
Stoke-by-Nayland
Holbrook
Great Sampford
Sible Hedingham
East Bergholt
Nayland
Stratford St. Mary
Shotley Gate
Newport
Bures
Finchingfield
Thaxted
Great Bardfield
Ramsey
Quendon
Ardleigh
Earls Colne
Wakes Colne
Wix
West Bergholt
Great Oakley
Elsenham
Bocking Churchstreet
Stebbing
Marks Tey
Coggeshall
Weeley
Thorpe-le-Soken
Bishop's Stortford
Takeley
Great Dunmow
Layer de la Haye
Thorrington
White Notley
Kelvedon
High Roding
St. Osyth
Terling
Sawbridgeworth
Leaden Roding
Little Waltham
Salcott
Tolleshunt D'Arcy
Tollesbury
Hatfield Peverel
Roxwell
Goldhanger
Bradwell Waterside
Bradwell-on-Sea
Fyfield
Writtle
Danbury
Great Baddow
Tillingham
Epping
Chipping Ongar
Cold Norton
Southminster
Ingatestone
Rettendon
South Woodham Ferrers
Billericay
Wickford
Chigwell Row
Hockley

PLAN 18

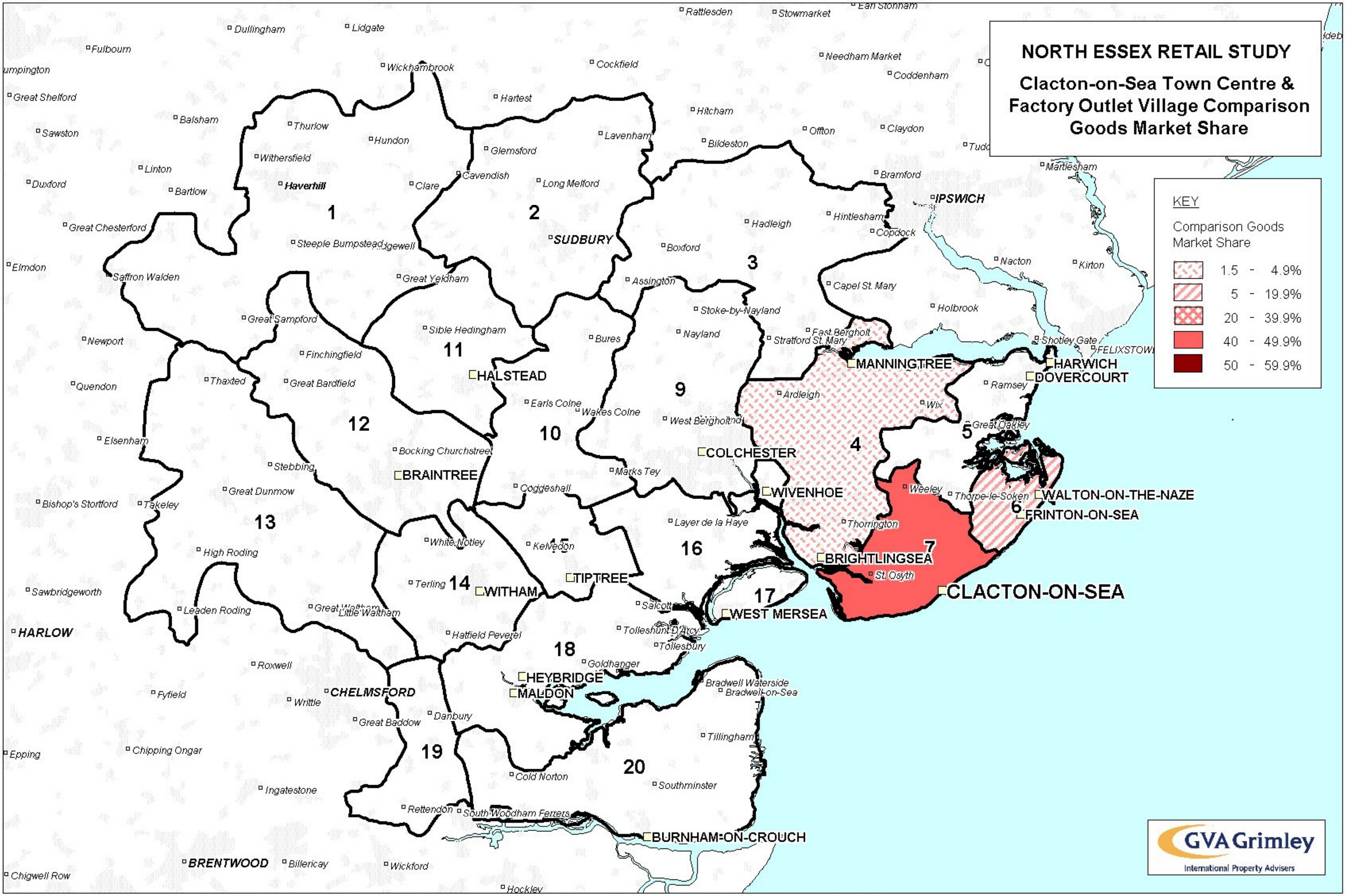
MALDON COMPARISON GOODS MARKET SHARE



NORTH ESSEX RETAIL STUDY
Maldon Comparison Goods Market Share
KEY
Comparison Goods Market Share
0.5 - 4.9%
5 - 19.9%
20 - 39.9%
40 - 49.9%
50 - 59.9%
GVA Grimley
International Property Advisers

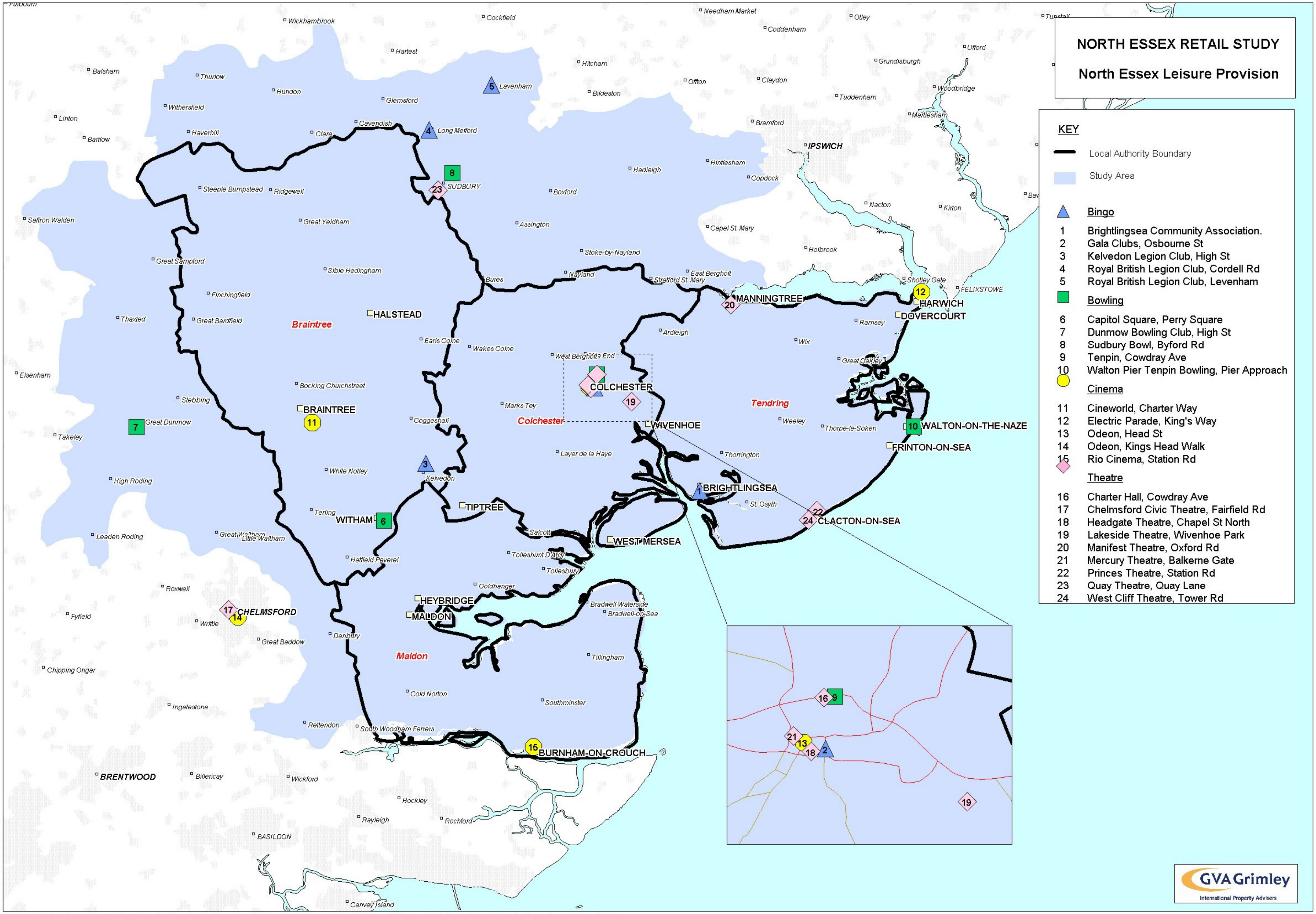
PLAN 19

CLACTON-ON-SEA COMPARISON GOODS MARKET SHARE (INCLUDING FACTORY OUTLET VILLAGE


NORTH ESSEX RETAIL STUDY
Clacton-on-Sea Town Centre & Factory Outlet Village Comparison Goods Market Share
KEY
Comparison Goods Market Share
1.5 - 4.9%
5 - 19.9%
20 - 39.9%
40 - 49.9%
50 - 59.9%
GVA Grimley
International Property Advisers
1
2
3
4
5
6
7
9
10
11
12
13
14
16
17
18
19
20
Haverhill
SUDBURY
IPSWICH
HALSTEAD
BRAINTREE
COLCHESTER
MANNINGTREE
HARWICH
DOVERCOURT
WIVENHOE
WALTON-ON-THE-NAZE
FRINTON-ON-SEA
BRIGHTLINGSEA
CLACTON-ON-SEA
WEST MERSEA
TIPTREE
WITHAM
HEYBRIDGE
MALDON
CHELMSFORD
BURNHAM-ON-CROUCH
HARLOW
BRENTWOOD
FELIXSTOWE
Rattlesden
Stowmarket
Dullingham
Lidgate
Fulbourn
Wickhambrook
Cockfield
Needham Market
Coddenham
Great Shelford
Hartest
Hitcham
Balsham
Thurlow
Hundon
Lavenham
Bildeston
Offton
Claydon
Sawston
Withersfield
Glemsford
Linton
Cavendish
Clare
Long Melford
Bramford
Martlesham
Duxford
Bartlow
Hadleigh
Hintlesham
Copdock
Great Chesterford
Steeple Bumpstead
Boxford
Elmdon
Saffron Walden
Great Yeldham
Assington
Nacton
Kirton
Capel St. Mary
Holbrook
Stoke-by-Nayland
Great Sampford
Sible Hedingham
Nayland
East Bergholt
Stratford St. Mary
Shotley Gate
Newport
Finchingfield
Bures
Thaxted
Great Bardfield
Quendon
Ardleigh
Ramsey
Earls Colne
Wakes Colne
Wix
West Bergholt
Great Oakley
Elsenham
Bocking Churchstreet
Stebbing
Marks Tey
Great Dunmow
Coggeshall
Weeley
Thorpe-le-Soken
Bishop's Stortford
Takeley
Layer de la Haye
Thorrington
White Notley
Kelvedon
High Roding
St. Osyth
Terling
Sawbridgeworth
Salcott
Leaden Roding
Little Waltham
Hatfield Peverel
Tolleshunt D'Arcy
Tollesbury
Roxwell
Goldhanger
Bradwell Waterside
Bradwell-on-Sea
Fyfield
Writtle
Danbury
Great Baddow
Tillingham
Epping
Chipping Ongar
Cold Norton
Southminster
Ingatestone
Rettendon
South Woodham Ferrers
Billericay
Wickford
Chigwell Row
Hockley

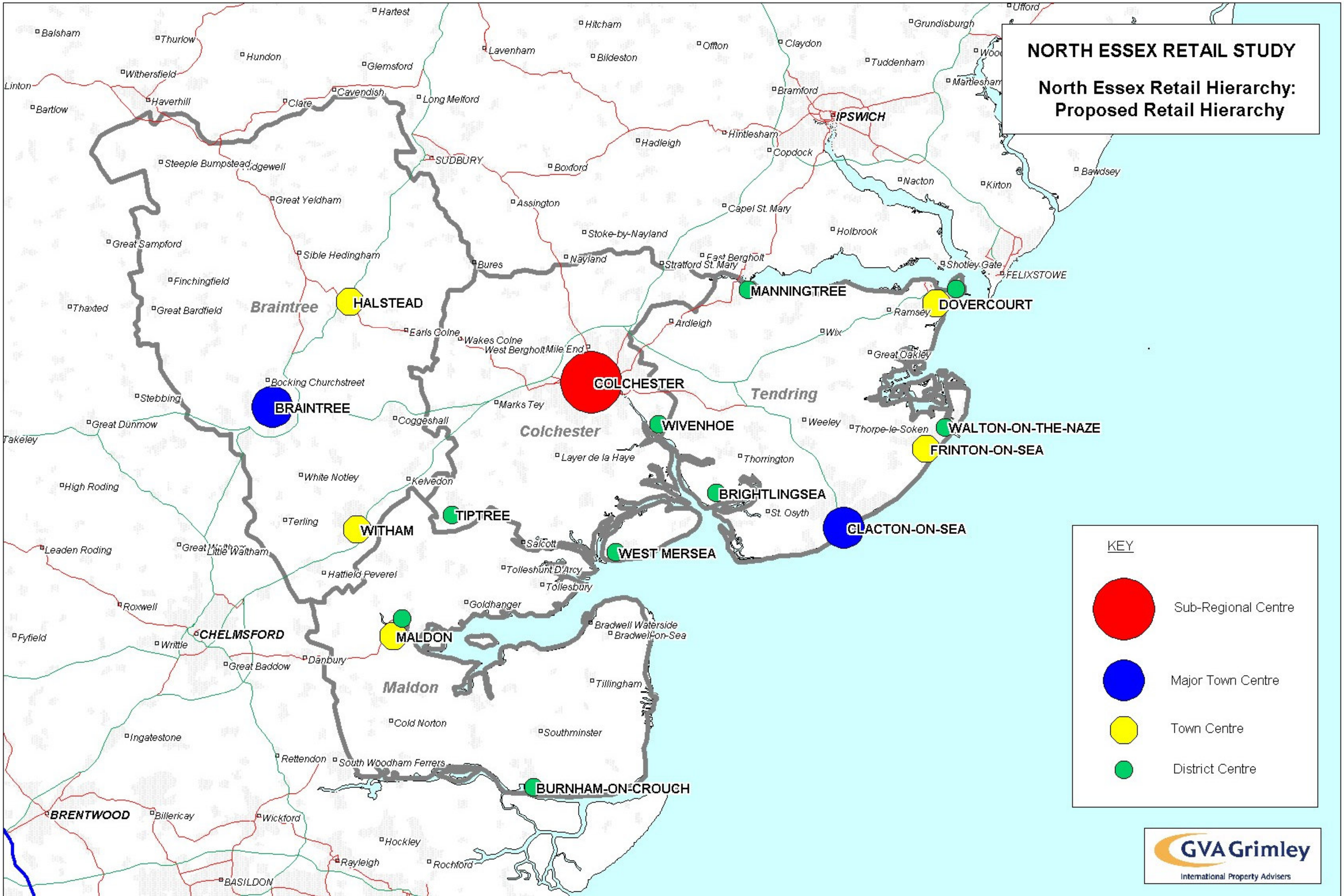
PLAN 20

EXISTING LEISURE PROVISION


NORTH ESSEX RETAIL STUDY
North Essex Leisure Provision
KEY
Local Authority Boundary
Study Area
Bingo
1 Brightlingsea Community Association.
2 Gala Clubs, Osbourne St
3 Kelvedon Legion Club, High St
4 Royal British Legion Club, Cordell Rd
5 Royal British Legion Club, Levenham
Bowling
6 Capitol Square, Perry Square
7 Dunmow Bowling Club, High St
8 Sudbury Bowl, Byford Rd
9 Tenpin, Cowdray Ave
10 Walton Pier Tenpin Bowling, Pier Approach
Cinema
11 Cineworld, Charter Way
12 Electric Parade, King's Way
13 Odeon, Head St
14 Odeon, Kings Head Walk
15 Rio Cinema, Station Rd
Theatre
16 Charter Hall, Cowdray Ave
17 Chelmsford Civic Theatre, Fairfield Rd
18 Headgate Theatre, Chapel St North
19 Lakeside Theatre, Wivenhoe Park
20 Manifest Theatre, Oxford Rd
21 Mercury Theatre, Balkerne Gate
22 Princes Theatre, Station Rd
23 Quay Theatre, Quay Lane
24 West Cliff Theatre, Tower Rd
Braintree
Colchester
Tendring
Maldon
HALSTEAD
BRAINTREE
WITHAM
TIPTREE
COLCHESTER
WIVENHOE
MANNINGTREE
HARWICH
DOVERCOURT
WALTON-ON-THE-NAZE
FRINTON-ON-SEA
BRIGHTLINGSEA
CLACTON-ON-SEA
WEST MERSEA
HEYBRIDGE
MALDON
CHELMSFORD
BURNHAM-ON-CROUCH
SUDBURY
IPSWICH
BRENTWOOD
BASILDON
GVA Grimley
International Property Advisers

PLAN 21

PROPOSED RETAIL HIERARCHY


NORTH ESSEX RETAIL STUDY
North Essex Retail Hierarchy: Proposed Retail Hierarchy
KEY
Sub-Regional Centre
Major Town Centre
Town Centre
District Centre
GVA Grimley
International Property Advisers
COLCHESTER
BRAINTREE
CLACTON-ON-SEA
HALSTEAD
WITHAM
MALDON
DOVERCOURT
FRINTON-ON-SEA
MANNINGTREE
WIVENHOE
BRIGHTLINGSEA
TIPTREE
WEST MERSEA
WALTON-ON-THE-NAZE
BURNHAM-ON-CROUCH
Braintree
Colchester
Tendring
Maldon
IPSWICH
CHELMSFORD
BRENTWOOD
BASILDON
SUDBURY
FELIXSTOWE
Hartest
Hitcham
Ufford
Grundisburgh
Balsham
Thurlow
Hundon
Lavenham
Bildeston
Offton
Claydon
Tuddenham
Glemsford
Withersfield
Linton
Cavendish
Long Melford
Bramford
Martlesham
Haverhill
Clare
Bartlow
Hintlesham
Hadleigh
Copdock
Steeple Bumpstead
Boxford
Nacton
Kirton
Bawdsey
Great Yeldham
Assington
Capel St. Mary
Holbrook
Stoke-by-Nayland
Great Sampford
Sible Hedingham
East Bergholt
Stratford St. Mary
Nayland
Bures
Shotley Gate
Finchingfield
Thaxted
Great Bardfield
Ramsey
Ardleigh
Earls Colne
Wakes Colne
Wix
West Bergholt
Mile End
Great Oakley
Bocking Churchstreet
Stebbing
Marks Tey
Great Dunmow
Coggeshall
Weeley
Thorpe-le-Soken
Takeley
Layer de la Haye
Thorrington
White Notley
Kelvedon
High Roding
St. Osyth
Terling
Leaden Roding
Salcott
Little Waltham
Hatfield Peverel
Tolleshunt D'Arcy
Tollesbury
Roxwell
Goldhanger
Bradwell Waterside
Bradwell-on-Sea
Fyfield
Writtle
Danbury
Great Baddow
Tillingham
Cold Norton
Southminster
Ingatestone
Rettendon
South Woodham Ferrers
Billericay
Wickford
Hockley
Rayleigh
Rochford

APPENDIX 1

TRADING INFLUENCE OF KEY COMPETING CENTRES

NORTH ESSEX RETAIL STUDY 2006

TABLE 1

COMPARISON GOODS ALLOCATION

% MARKET SHARE

ZONE	Chelmsford	Ipswich	Cambridge	Haverhill	Sudbury	Bury St Edmonds	London	Bluewater	Basildon	Lakeside	Sub-Total	Other	Total
1	0.6	0.3	24.1	23.1	2.3	10.3	0.5	0.0	0.0	0.9	62.1	37.9	100.0
2	0.0	4.0	1.2	0.0	40.3	11.1	0.8	0.4	0.0	0.0	57.7	42.3	100.0
3	0.5	42.2	0.6	0.0	2.5	1.4	1.8	0.0	0.0	0.3	49.3	50.7	100.0
4	0.0	13.4	0.0	0.0	0.0	0.0	1.2	0.0	0.0	0.2	14.9	85.1	100.0
5	0.4	2.6	0.0	1.1	0.4	0.0	0.3	0.0	0.0	0.4	5.2	94.8	100.0
6	0.9	1.3	0.0	0.0	0.0	0.0	1.6	0.0	0.0	0.0	3.8	96.2	100.0
7	0.5	0.8	0.0	0.0	0.0	0.0	0.4	0.1	0.0	0.7	2.5	97.5	100.0
8	0.7	0.7	0.0	0.0	0.0	0.0	1.8	0.0	0.0	0.5	3.8	96.2	100.0
9	0.3	1.6	0.1	0.0	1.0	0.1	0.4	0.8	0.0	0.2	4.5	95.5	100.0
10	1.2	0.4	0.0	0.0	3.5	0.0	0.9	0.5	0.0	0.2	6.7	93.3	100.0
11	4.9	0.0	0.2	0.0	5.0	0.0	0.3	1.1	0.3	0.1	11.9	88.1	100.0
12	15.8	0.0	0.7	0.5	0.0	0.3	0.5	0.2	0.0	0.8	18.7	81.3	100.0
13	37.2	0.0	2.4	0.0	0.0	0.0	1.9	0.8	0.0	1.3	43.7	56.3	100.0
14	42.5	0.0	0.1	0.0	0.0	0.0	0.3	1.4	0.0	0.9	45.3	54.7	100.0
15	3.2	0.0	0.0	0.0	0.0	0.0	1.8	0.0	0.0	1.5	6.4	93.6	100.0
16	0.3	1.2	0.0	0.0	0.0	0.0	0.3	1.0	0.0	0.2	3.0	97.0	100.0
17	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.6	99.4	100.0
18	40.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	1.8	42.2	57.8	100.0
19	53.6	0.0	0.2	0.0	0.0	0.0	1.9	2.3	0.4	2.6	61.0	39.0	100.0
20	38.1	0.0	0.0	0.0	0.0	0.0	0.2	1.6	7.8	4.2	51.7	48.3	100.0

TABLE 2

COMPARISON GOODS ALLOCATION

SPEND (£)

ZONE	Chelmsford	Ipswich	Cambridge	Haverhill	Sudbury	Bury St Edmonds	London	Bluewater	Basildon	Lakeside	Sub-Total	Other	Total
1	699.6	414.5	28,719.9	27,515.2	2,743.8	12,282.3	570.2	0.0	0.0	1,028.0	73,973.4	45,097.1	119,070.5
2	0.0	3,622.5	1,062.1	0.0	36,558.9	10,056.1	721.4	325.6	0.0	0.0	52,346.6	38,322.6	90,669.2
3	356.0	29,542.0	447.1	0.0	1,779.6	963.2	1,231.2	0.0	0.0	179.4	34,498.5	35,468.9	69,967.4
4	0.0	12,246.8	0.0	0.0	0.0	0.0	1,124.0	0.0	0.0	192.5	13,563.3	77,601.8	91,165.1
5	290.8	1,793.2	0.0	767.8	290.8	0.0	207.0	0.0	0.0	290.8	3,640.3	65,753.9	69,394.2
6	474.2	638.5	0.0	0.0	0.0	0.0	785.5	0.0	0.0	0.0	1,898.2	48,455.3	50,353.4
7	854.4	1,355.1	0.0	0.0	0.0	0.0	634.5	263.9	0.0	1,274.8	4,382.7	172,514.1	176,896.8
8	146.6	146.6	0.0	0.0	0.0	0.0	371.7	0.0	0.0	110.4	775.3	19,555.9	20,331.2
9	986.7	5,163.5	293.8	0.0	3,280.1	167.6	1,390.3	2,728.3	0.0	697.5	14,707.8	309,986.1	324,693.8
10	580.7	216.0	0.0	0.0	1,701.2	0.0	421.7	265.1	0.0	118.8	3,303.5	45,908.9	49,212.4
11	2,644.7	0.0	114.8	0.0	2,743.2	0.0	162.2	611.1	162.2	49.7	6,488.0	47,877.8	54,365.8
12	23,675.5	0.0	1,048.0	687.4	0.0	441.4	717.3	260.7	0.0	1,138.9	27,969.3	121,819.3	149,788.6
13	28,711.0	0.0	1,884.2	0.0	0.0	0.0	1,484.6	651.5	0.0	1,025.6	33,756.9	43,454.1	77,211.1
14	38,126.0	0.0	84.9	0.0	0.0	0.0	295.4	1,279.8	0.0	837.0	40,623.2	49,112.9	89,736.1
15	1,392.8	0.0	0.0	0.0	0.0	0.0	771.3	0.0	0.0	648.2	2,812.3	40,924.0	43,736.3
16	72.8	285.4	0.0	0.0	0.0	0.0	83.7	235.3	0.0	50.8	728.0	23,330.3	24,058.3
17	0.0	0.0	0.0	0.0	0.0	0.0	122.2	0.0	0.0	0.0	122.2	18,777.4	18,899.5
18	34,708.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	340.7	1,576.6	36,625.7	50,233.7	86,859.4
19	16,931.4	0.0	77.9	0.0	0.0	0.0	602.9	722.2	117.8	808.8	19,261.0	12,336.9	31,597.9
20	25,339.2	0.0	0.0	0.0	0.0	0.0	103.1	1,038.1	5,196.1	2,768.6	34,445.1	32,133.8	66,578.9
TOTAL	**175,990.9**	**55,424.0**	**33,732.7**	**28,970.5**	**49,097.5**	**23,910.5**	**11,800.2**	**8,381.7**	**5,816.8**	**12,796.3**	**405,921.2**	**1,298,664.8**	**1,704,586.0**

APPENDIX 2

PPS6 DEFINITIONS: TYPES OF CENTRE AND THEIR MAIN CHARACTERISTICS

Annex A: Typologies

Table 1: Types of Centre and their main characteristics

City	City centres are the highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions. Planning for the future of such areas can be achieved successfully through the use of area action plans, with masterplans or development briefs for particular sites. In London the 'international' and 'metropolitan' centres identified in the Mayor's Spatial Development Strategy typically perform the role of city sites.
Town	Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how there contribute to its overall vitality and viability. In London the 'major' and many of the 'district' centres identified in the Mayor's Spatial Development Strategy typically perform the role of town centres.
District	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants as well as local public facilities such a library.
Local	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and laundrette. In rural areas, large villages may perform the role of a local centre.

Source: PPS6

Table 2: Types of Location

Town Centre (ie. Types of Centre identified in Table 1)	Defined area, including the primary shopping area of predominately leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on the proposals map.
Primary shopping area	Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages, which are contiguous and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have area of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area.
Primary frontage	Primary frontages are likely to include a high proportion of retail uses.
Secondary frontage	Secondary frontages provide greater opportunities for a diversity of uses.
Edge-of-centre	For retail purposes, a location that is well connected to and within easy walking distance (ie. Up to 300 metres) of the primary shopping area. For all other main town centre uses, this is likely to be within 300 meters of a town centre boundary. In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances. For example, local topography will affect pedestrians' perceptions of easy walking distance from the centre. Other considerations include barriers, such as crossing major roads and car parks, the attractiveness and perceived safety of the route and the strength of attraction and size of the town centre. A site will not be well connected to a centre where it is physically separated from it by a barrier such as a major road, railway line or river and there is no existing or proposed pedestrian route which provided safe and convenient access to the centre.
Out-of-centre	A location which is not in or on the edge of a centre but not necessarily outside the urban area.
Out-of-town	An out-of-centre development outside the existing urban area.

Source: PPS6

APPENDIX 3

HIERARCHY OF CENTRES: BENCHMARKING

NORTH ESSEX RETAIL STUDY 2006
BENCHMARKING OF CENTRES

TABLE 1

		Rank by Catchment Population	Rank Score
1	Colchester	621,243	19
2	Braintree & Factory Outlet	478,500	18
3	Clacton-on-Sea & Factory Outlet	430,620	17
4	Clacton-on-Sea	412,676	16
5	Braintree	276,976	15
6	Witham	235,335	14
7	Maldon	169,776	13
8	Frinton-on-Sea	145,463	12
9	Walton-on-the-Naze	95,521	11
10	Tiptree	77,556	10
11	Dovercourt	60,224	9
12	Harwich	60,224	9
13	Wivenhoe	41,821	7
14	Halstead	38,482	6
15	Brightlingsea	34,195	5
16	Manningtree	26,244	4
17	Burnham-on-Crouch	24,973	3
18	West Mersea	7,089	2
19	Bentall Centre, Heybridge	-	1

NORTH ESSEX RETAIL STUDY 2006
BENCHMARKING OF CENTRES

TABLE 2

		Rank by Shopping Population	Rank Score
1	Colchester	164,921	19
2	Braintree & Factory Outlet	37,876	18
3	Clacton-on-Sea & Factory Outlet	35,867	17
4	Clacton-on-Sea	33,305	16
5	Braintree	24,103	15
6	Maldon	11,602	14
7	Frinton-on-Sea	5,797	13
8	Dovercourt	4,849	12
9	Witham	4,195	11
10	Harwich	3,283	10
11	Halstead	2,940	9
12	West Mersea	926	8
13	Brightlingsea	866	7
14	Tiptree	598	6
15	Wivenhoe	546	5
16	Walton-on-the-Naze	449	4
17	Burnham-on-Crouch	415	3
18	Manningtree	86	2
19	Bentall Centre, Heybridge	-	1

NORTH ESSEX RETAIL STUDY 2006
BENCHMARKING OF CENTRES

TABLE 3

		Rank by Shopping Population as % of Catchment Population	Rank Score
1	Colchester	26.5	19
2	West Mersea	12.5	18
3	Dovercourt	12.1	17
4	Maldon	12.0	16
5	Frinton-on-Sea	10.2	15
6	Braintree	8.3	14
7	Clacton-on-Sea & Factory Outlet	8.3	14
8	Clacton-on-Sea	7.9	12
9	Braintree & Factory Outlet	7.9	12
10	Brightlingsea	7.0	10
11	Halstead	7.0	10
12	Harwich	6.3	8
13	Burnham-on-Crouch	1.6	7
14	Wivenhoe	1.4	6
15	Witham	1.4	6
16	Manningtree	1.2	4
17	Tiptree	0.6	3
18	Walton-on-the-Naze	0.4	2
19	Bentall Centre, Heybridge	-	1

NORTH ESSEX RETAIL STUDY 2006
BENCHMARKING OF CENTRES

TABLE 4

		Rank by Comparison Goods Turnover (£000)	Rank Score
1	Colchester	439,402	19
2	Braintree & Factory Outlet	101,008	18
3	Clacton-on-Sea & Factory Outlet	96,964	17
4	Clacton-on-Sea	88,792	16
5	Braintree	64,259	15
6	Maldon	28,116	14
7	Frinton-on-Sea	15,456	13
8	Dovercourt	12,927	12
9	Witham	10,985	11
10	Harwich	8,752	10
11	Halstead	7,839	9
12	West Mersea	2,469	8
13	Brightlingsea	2,309	7
14	Tiptree	1,595	6
15	Wivenhoe	1,457	5
16	Walton-on-the-Naze	1,198	4
17	Burnham-on-Crouch	525	3
18	Manningtree	229	2
19	Bentall Centre, Heybridge	-	1

NORTH ESSEX RETAIL STUDY 2006
BENCHMARKING OF CENTRES

TABLE 5

		Rank by No. of Retailer Requirements	Rank Score
1	Colchester	93	19
2	Braintree	20	18
3	Clacton-on-Sea	20	18
4	Braintree & Factory Outlet	20	18
5	Clacton-on-Sea & Factory Outlet	20	18
6	Maldon	9	17
7	Witham	7	16
8	Harwich	5	15
9	Halstead	4	14
10	Dovercourt	2	13
11	Tiptree	-	1
12	West Mersea	-	1
13	Wivenhoe	-	1
14	Burnham-on-Crouch	-	1
15	Bentall Centre, Heybridge	-	1
16	Brightlingsea	-	1
17	Frinton-on-Sea	-	1
18	Manningtree	-	1
19	Walton-on-the-Naze	-	1

NORTH ESSEX RETAIL STUDY 2006
BENCHMARKING OF CENTRES

TABLE 6

		Rank by Comparison Goods Floorspace Sq m net	Rank Score
1	Colchester	41,665	19
2	Braintree & Factory Outlet	24,137	18
3	Clacton-on-Sea & Factory Outlet	21,138	17
4	Clacton-on-Sea	14,072	16
5	Braintree	11,837	15
6	Maldon	10,082	14
7	Witham	7,430	13
8	Frinton-on-Sea	6,825	12
9	Halstead	5,493	11
10	Dovercourt	5,376	10
11	Burnham-on-Crouch	1,170	9
12	Walton-on-the-Naze	1,170	9
13	West Mersea	990	7
14	Brightlingsea	900	6
15	Harwich	845	5
16	Manningtree	720	4
17	Tiptree	650	3
18	Wivenhoe	315	2
19	Bentall Centre, Heybridge	90	1

NORTH ESSEX RETAIL STUDY 2006
BENCHMARKING OF CENTRES

TABLE 7

		Rank by Convenience Goods Floorspace Sq m net	Rank Score
1	Braintree	11,757	19
2	Braintree & Factory Outlet	11,757	19
3	Witham	3,528	17
4	Colchester	3,436	16
5	Halstead	3,032	15
6	Clacton-on-Sea	2,675	14
7	Clacton-on-Sea & Factory Outlet	2,675	14
8	Tiptree	2,552	12
9	Brightlingsea	2,150	11
10	Maldon	1,834	10
11	Frinton-on-Sea	1,269	9
12	Dovercourt	1,239	8
13	Manningtree	1,229	7
14	West Mersea	1,130	6
15	Wivenhoe	733	5
16	Bentall Centre, Heybridge	346	4
17	Harwich	299	3
18	Walton-on-the-Naze	273	2
19	Burnham-on-Crouch	225	1

NORTH ESSEX RETAIL STUDY 2006
BENCHMARKING OF CENTRES

TABLE 8

		Rank by Total Floorspace Sq m net	Rank Score
1	Colchester	45,101	19
2	Braintree & Factory Outlet	35,894	18
3	Clacton-on-Sea & Factory Outlet	23,813	17
4	Braintree	23,594	16
5	Clacton-on-Sea	16,747	15
6	Maldon	11,916	14
7	Witham	10,958	13
8	Halstead	8,525	12
9	Frinton-on-Sea	8,094	11
10	Dovercourt	6,615	10
11	Tiptree	3,202	9
12	Brightlingsea	3,050	8
13	West Mersea	2,120	7
14	Manningtree	1,949	6
15	Walton-on-the-Naze	1,443	5
16	Burnham-on-Crouch	1,395	4
17	Harwich	1,144	3
18	Wivenhoe	1,048	2
19	Bentall Centre, Heybridge	436	1

NORTH ESSEX RETAIL STUDY 2006
BENCHMARKING OF CENTRES

TABLE 9

		Rank Score
1	Colchester	149
2	Braintree & Factory Outlet	139
3	Clacton-on-Sea & Factory Outlet	131
4	Braintree	127
5	Clacton-on-Sea	123
6	Maldon	112
7	Witham	101
8	Dovercourt	91
9	Halstead	86
10	Frinton-on-Sea	86
11	Harwich	63
12	West Mersea	57
13	Brightlingsea	55
14	Tiptree	50
15	Walton-on-the-Naze	38
16	Wivenhoe	33
17	Burnham-on-Crouch	31
18	Manningtree	30
19	Bentall Centre, Heybridge	11

APPENDIX 4

CAPACITY PROJECTIONS: CONVENIENCE GOODS

NORTH ESSEX RETAIL STUDY 2006

TABLE 1

SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	2006	2011	2016	2021
1	CB9 0/7/8/9; CB10 2; CO10 8; CO9 4	44,662	46,991	47,550	48,116
2	CO10 0/1/2/7/9	34,009	34,878	35,941	37,036
3	CO10 5; CO6 5; CO7 6; IP7 5/6; IP8 3	26,244	26,994	27,858	28,750
4	CO11 1/2; CO7 0/7/8	34,195	36,132	38,131	40,241
5	CO12 3/4/5; CO16 0	26,029	27,587	29,283	31,083
6	CO13 0/9; CO14 8	18,887	18,521	18,485	18,449
7	CO15 1/2/3/4/5/6; CO16 7/8/9	66,352	68,085	70,427	72,850
8	CO7 9	7,626	7,873	8,148	8,433
9	CO1 1/2; CO2 7/8/9; CO3 0/3/4/8/9; CO4 0/3/5/9; CO6 3/4	121,789	127,906	133,867	140,106
10	CO6 1/2; CO8 5	18,459	18,409	18,352	18,295
11	CO9 1/2/3	20,392	20,245	20,080	19,916
12	CM7 1/2/3/4/5/9; CM77 6/7/8	56,184	56,206	56,149	56,092
13	CM3 1/3; CM6 1/2/3	28,961	29,841	30,756	31,699
14	CM3 2; CM8 1/2/3	33,659	33,514	33,330	33,147
15	CO5 0/9	16,405	14,676	16,942	19,558
16	CO2 0; CO5 7	9,024	9,261	9,502	9,749
17	CO5 8	7,089	7,008	6,940	6,873
18	CM9 4/5/6; CM9 8	32,580	33,046	33,411	33,780
19	CM3 4/8	11,852	12,037	12,180	12,325
20	CM0 7/8; CM3 6	24,973	25,135	25,279	25,424
TOTAL		**639,371**	**654,345**	**672,611**	**691,921**

SOURCE: Experian Business Solutions, January 2006

TABLE 1A

POPULATION GROWTH RATES

GROWTH RATES 2006-2011 (%)	2011-2016 (%)	2016-2021 (%)	2006-2021 (%)
5	1	1	8
3	3	3	9
3	3	3	10
6	6	6	18
6	6	6	19
-2	0	0	-2
3	3	3	10
3	3	3	11
5	5	5	15
0	0	0	-1
-1	-1	-1	-2
0	0	0	0
3	3	3	9
0	-1	-1	-2
-11	15	15	19
3	3	3	8
-1	-1	-1	-3
1	1	1	4
2	1	1	4
1	1	1	2
2	**3**	**3**	**8**

NORTH ESSEX RETAIL STUDY 2006

TABLE 2

SURVEY AREA RETAIL EXPENDITURE FORECASTS (2003 prices)

PER CAPITA EXPENDITURE	2003	2006	2011	2016	2021
	(£)	(£)	(£)	(£)	(£)
Convenience Goods	1,591	1,625	1,682	1,742	1,804
Comparison Goods	2,350	2,666	3,291	4,062	5,013

GROWTH IN PER CAPITA RETAIL EXPENDITURE:

Convenience Goods: 0.70 % pa 2003 - 2021

Comparison Goods: 4.30 % pa 2003 - 2021

	CONVENIENCE GOODS				COMPARISON GOODS			
	2006	2011	2016	2021	2006	2011	2016	2021
ZONE	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	72,560	79,054	82,834	86,794	119,070	154,633	193,134	241,222
2	55,253	58,676	62,610	66,809	90,669	114,773	145,982	185,678
3	42,638	45,413	48,530	51,860	69,967	88,829	113,151	144,133
4	55,555	60,786	66,425	72,589	91,165	118,899	154,877	201,741
5	42,288	46,410	51,012	56,070	69,394	90,780	118,939	155,832
6	30,685	31,158	32,201	33,280	50,353	60,947	75,081	92,492
7	107,799	114,541	122,686	131,411	176,897	224,047	286,054	365,223
8	12,390	13,245	14,194	15,211	20,331	25,908	33,095	42,276
9	197,865	215,179	233,201	252,732	324,694	420,900	543,729	702,404
10	29,990	30,970	31,970	33,002	49,212	60,578	74,541	91,721
11	33,130	34,059	34,980	35,926	54,366	66,620	81,559	99,848
12	91,280	94,557	97,813	101,182	149,789	184,957	228,061	281,211
13	47,052	50,202	53,578	57,181	77,211	98,198	124,922	158,919
14	54,684	56,381	58,062	59,793	89,736	110,284	135,377	166,179
15	26,653	24,690	29,514	35,280	43,736	48,294	68,814	98,051
16	14,661	15,580	16,553	17,586	24,058	30,475	38,594	48,877
17	11,517	11,790	12,090	12,397	18,900	23,061	28,188	34,455
18	52,931	55,594	58,203	60,935	86,859	108,744	135,706	169,352
19	19,255	20,250	21,218	22,232	31,598	39,610	49,472	61,788
20	40,573	42,285	44,037	45,861	66,579	82,712	102,676	127,459
TOTAL	**1,038,759**	**1,100,819**	**1,171,711**	**1,248,131**	**1,704,586**	**2,153,249**	**2,731,952**	**3,468,861**

Source: Experian Business Solutions, January 2006

CONVENIENCE GOODS
COLCHESTER TOWN CENTRE

TABLE 3
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	J SAINSBURY, CULVER ST/PRIORY WALK				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	1	1	1	1	0	0	0	0	1	1	1	1
3	2	2	2	2	0	0	0	0	2	2	2	2
4	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0
8	4	4	4	4	0	0	0	0	4	4	4	4
9	5	5	5	5	1	1	1	1	5	5	5	5
10	4	4	4	4	0	0	0	0	4	4	4	4
11	2	2	2	2	0	0	0	0	2	2	2	2
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0
16	3	3	3	3	1	1	1	1	4	4	4	4
17	4	4	4	4	0	0	0	0	4	4	4	4
18	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005
NOTE: Other Town Centre includes Iceland, St Johns Street / M&S Food Hall

TABLE 4
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	J SAINSBURY, CULVER ST/PRIORY WALK				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	414	440	470	501	0	0	0	0	414	440	470	501
3	767	817	874	933	160	170	182	194	927	988	1,056	1,128
4	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	404	430	460	493	0	0	0	0	404	430	460	493
8	480	513	550	589	0	0	0	0	480	513	550	589
9	8,953	9,737	10,552	11,436	1,682	1,829	1,982	2,148	10,635	11,566	12,535	13,584
10	1,147	1,185	1,223	1,262	0	0	0	0	1,147	1,185	1,223	1,262
11	571	588	603	620	0	0	0	0	571	588	603	620
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	191	197	203	209	0	0	0	0	191	197	203	209
15	120	111	133	159	0	0	0	0	120	111	133	159
16	476	506	538	572	172	183	194	207	649	689	732	778
17	406	416	426	437	0	0	0	0	406	416	426	437
18	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**13,932**	**14,940**	**16,032**	**17,212**	**2,014**	**2,182**	**2,359**	**2,549**	**15,946**	**17,122**	**18,391**	**19,761**

SOURCE: Tables 2 & 3

CONVENIENCE GOODS
COLCHESTER OUT OF CENTRE

Table 5
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

	ASDA, TURNER RISE				TESCO, HIGHWOODS				TESCO, GREENSTEAD ROAD				CO-OP, FIVEWAYS RETAIL PARK				J SAINSBURY, TOLLGATE WEST			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	4	4	4	4	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
3	1	1	1	1	5	5	5	5	1	1	1	1	0	0	0	0	1	1	1	1
4	5	5	5	5	20	20	20	20	10	10	10	10	0	0	0	0	2	2	2	2
5	3	3	3	3	4	4	4	4	1	1	1	1	1	1	1	1	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	2	2	2	2	11	11	11	11	32	32	32	32	0	0	0	0	4	4	4	4
9	13	13	13	13	25	25	25	25	9	9	9	9	2	2	2	2	23	23	23	23
10	3	3	3	3	1	1	1	1	0	0	0	0	0	0	0	0	38	38	38	38
11	3	3	3	3	2	2	2	2	0	0	0	0	0	0	0	0	2	2	2	2
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
14	1	1	1	1	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1
15	2	2	2	2	1	1	1	1	0	0	0	0	1	1	1	1	12	12	12	12
16	6	6	6	6	7	7	7	7	8	8	8	8	1	1	1	1	27	27	27	27
17	4	4	4	4	17	17	17	17	5	5	5	5	0	0	0	0	9	9	9	9
18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 6
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

	ASDA, TURNER RISE				TESCO, HIGHWOODS				TESCO, GREENSTEAD ROAD				CO-OP, FIVEWAYS RETAIL PARK				J SAINSBURY, TOLLGATE WEST			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	2,362	2,508	2,677	2,856	0	0	0	0	0	0	0	0	0	0	0	0	787	836	892	952
3	384	409	437	467	1,919	2,044	2,184	2,334	384	409	437	467	0	0	0	0	384	409	437	467
4	2,667	2,918	3,188	3,484	10,986	12,020	13,136	14,354	5,583	6,109	6,676	7,295	0	0	0	0	833	912	996	1,089
5	1,396	1,532	1,683	1,850	1,744	1,914	2,104	2,313	349	383	421	463	349	383	421	463	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	808	859	920	986	189	200	215	230	404	430	460	493	0	0	0	0	0	0	0	0
8	251	268	287	308	1,369	1,464	1,568	1,681	3,971	4,245	4,549	4,875	0	0	0	0	502	536	575	616
9	26,118	28,404	30,783	33,361	48,477	52,719	57,134	61,919	18,698	20,334	22,037	23,883	3,314	3,604	3,906	4,233	45,608	49,599	53,753	58,255
10	990	1,022	1,055	1,089	292	302	312	322	0	0	0	0	0	0	0	0	11,449	11,823	12,204	12,599
11	986	1,013	1,041	1,069	571	588	603	620	0	0	0	0	0	0	0	0	571	588	603	620
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	353	377	402	429
14	369	381	392	404	0	0	0	0	561	578	595	613	0	0	0	0	561	578	595	613
15	560	518	620	741	280	259	310	370	0	0	0	0	280	259	310	370	3,138	2,907	3,475	4,154
16	924	982	1,043	1,108	1,067	1,133	1,204	1,279	1,224	1,301	1,382	1,468	143	152	161	171	3,914	4,160	4,420	4,696
17	406	416	426	437	2,013	2,060	2,113	2,166	605	619	635	651	0	0	0	0	1,002	1,026	1,052	1,079
18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**38,219**	**41,229**	**44,552**	**48,159**	**68,907**	**74,704**	**80,883**	**87,589**	**31,779**	**34,407**	**37,192**	**40,208**	**4,086**	**4,398**	**4,798**	**5,238**	**69,102**	**73,749**	**79,404**	**85,567**

SOURCE: Table 2 & 5

CONVENIENCE GOODS
TIPTREE TOWN CENTRE

TABLE 7
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	TESCO, CHURCH ROAD				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0
10	1	1	1	1	0	0	0	0	1	1	1	1
11	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	1	1	1	1	0	0	0	0	1	1	1	1
15	51	51	51	51	3	3	3	3	54	54	54	54
16	5	5	5	5	0	0	0	0	6	6	6	6
17	0	0	0	0	0	0	0	0	0	0	0	0
18	1	1	1	1	0	0	0	0	1	1	1	1
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 8
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	TESCO, CHURCH ROAD				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0
10	292	302	312	322	0	0	0	0	292	302	312	322
11	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	369	381	392	404	0	0	0	0	369	381	392	404
15	13,606	12,604	15,067	18,010	753	697	834	997	14,359	13,302	15,900	19,007
16	751	798	848	901	59	62	66	70	810	861	915	972
17	0	0	0	0	0	0	0	0	0	0	0	0
18	437	459	480	503	0	0	0	0	437	459	480	503
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**15,456**	**14,544**	**17,099**	**20,140**	**812**	**760**	**900**	**1,067**	**16,267**	**15,304**	**17,999**	**21,207**

SOURCE: Tables 2 & 7

CONVENIENCE GOODS
WEST MERSEA TOWN CENTRE

TABLE 9
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	CO-OP, BARFIELD ROAD				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0
17	32	32	32	32	3	3	3	3	35	35	35	35
18	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 10
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	CO-OP, BARFIELD ROAD				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0
17	3,714	3,802	3,899	3,998	360	368	378	387	4,074	4,171	4,277	4,386
18	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**3,714**	**3,802**	**3,899**	**3,998**	**360**	**368**	**378**	**387**	**4,074**	**4,171**	**4,277**	**4,386**

SOURCE: Tables 2 & 9

CONVENIENCE GOODS
WIVENHOE TOWN CENTRE

TABLE 11
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	CO-OP				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0
8	12	12	12	12	2	2	2	2	14	14	14	14
9	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 12
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	CO-OP				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0
4	167	182	199	218	0	0	0	0	167	182	199	218
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0
8	1,490	1,593	1,707	1,829	229	245	263	281	1,719	1,838	1,969	2,111
9	0	0	0	0	0	0	0	0	0	0	0	0
10	135	139	144	149	0	0	0	0	135	139	144	149
11	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**1,791**	**1,914**	**2,050**	**2,195**	**229**	**245**	**263**	**281**	**2,021**	**2,159**	**2,313**	**2,477**

SOURCE: Tables 2 & 11

NORTH ESSEX RETAIL STUDY 2006

COLCHESTER BOROUGH COUNCIL

TABLE 13
COLCHESTER CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
J Sainsbury, Priory Walk	1,315	90%	1,184	10,041	11,884
Other	2,371	95%	2,252	4,500	10,136
SUB-TOTAL	**3,686**		**3,436**		**22,020**
OUT OF CENTRE					
J Sainsbury, Tollgate West	6,164	70%	4,315	10,041	43,325
Tesco Extra, Highwoods Square	7,501	70%	5,251	11,932	62,651
Asda, Crouch Street, Turner Rise	4,194	70%	2,936	12,356	36,275
Tesco, Greenstead Road	5,191	70%	3,634	11,932	43,357
Co-Op, Fiveways Retail Park	629	95%	598	3,575	2,136
SUB-TOTAL	**23,679**		**16,733**		**187,745**
TOTAL	**27,365**		**20,169**	**10,401**	**209,764**

TABLE 14
TIPTREE CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Tesco Superstore, Church Road	1,697	80%	1,358	11,932	16,199
Co-Op, Church Road	1,115	95%	1,059	3,575	3,787
Other	135	100%	135	3,000	405
TOTAL	**2,947**		**2,552**	**7,991**	**20,391**

TABLE 15
WEST MERSEA CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Co-Op, Barfield Road	1,000	95%	950	3,575	3,396
Other	180	100%	180	3,000	540
TOTAL	**1,180**		**1,130**	**3,483**	**3,936**

TABLE 16
WIVENHOE CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Co-Op, The Avenue	629	95%	598	3,575	2,136
Other	135	100%	135	3,000	405
TOTAL	**764**		**733**	**3,469**	**2,541**

TABLE 17
TOTAL CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)		Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOTAL	**32,256**		**24,583**	**9,626**	**236,632**

Source: IGD/Colchester Borough Council/GVA Grimley Site Visits

NORTH ESSEX RETAIL STUDY 2006

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 18
FUTURE SHOP FLOORSPACE CAPACITY IN COLCHESTER BOROUGH

	CONVENIENCE GOODS			
	2006	2011	2016	2021
Residents Spending (£000)	250,401	267,243	289,808	314,590
Existing Shop Floorspace (sq m net)	24,583	24,583	24,583	24,583
Sales per sq m net £	10,186	9,626	9,626	9,626
Sales from Existing Floorspace (£000)	250,401	236,632	236,632	236,632
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	30,611	53,176	77,958
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	3,061	5,318	7,796

NORTH ESSEX RETAIL STUDY 2006

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 19
FUTURE SHOP FLOORSPACE CAPACITY IN COLCHESTER URBAN AREA

	CONVENIENCE GOODS			
	2006	2011	2016	2021
Residents Spending (£000) (See Note A)	228,039	245,609	265,220	286,521
Existing Shop Floorspace (sq m net)	20,169	20,169	20,169	20,169
Sales per sq m net £	11,307	10,401	10,401	10,401
Sales from Existing Floorspace (£000)	228,039	209,764	209,764	209,764
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	35,845	55,456	76,757
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	3,585	5,546	7,676

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 20
FUTURE SHOP FLOORSPACE CAPACITY IN TIPTREE

	CONVENIENCE GOODS			
	2006	2011	2016	2021
Residents Spending (£000)	16,267	15,304	17,999	21,207
Existing Shop Floorspace (sq m net)	2,552	2,552	2,552	2,552
Sales per sq m net £	6,375	7,991	7,991	7,991
Sales from Existing Floorspace (£000)	16,267	20,391	20,391	20,391
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	-5,087	-2,392	816
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	-509	-239	82

NORTH ESSEX RETAIL STUDY 2006

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 21
FUTURE SHOP FLOORSPACE CAPACITY IN WEST MERSEA

	CONVENIENCE GOODS			
	2006	2011	2016	2021
Residents Spending (£000)	4,074	4,171	4,277	4,386
Existing Shop Floorspace (sq m net)	1,130	1,130	1,130	1,130
Sales per sq m net £	3,605	3,483	3,483	3,483
Sales from Existing Floorspace (£000)	4,074	3,936	3,936	3,936
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	234	340	449
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	23	34	45

NORTH ESSEX RETAIL STUDY 2006

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 22
FUTURE SHOP FLOORSPACE CAPACITY IN WIVENHOE

	CONVENIENCE GOODS			
	2006	2011	2016	2021
Residents Spending (£000)	2,021	2,159	2,313	2,477
Existing Shop Floorspace (sq m net)	733	733	733	733
Sales per sq m net £	2,758	3,469	3,469	3,469
Sales from Existing Floorspace (£000)	2,021	2,541	2,541	2,541
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	-382	-229	-64
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	-38	-23	-6

NORTH ESSEX RETAIL STUDY 2006

CONVENIENCE GOODS
BRAINTREE TOWN CENTRE

TABLE 23
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	J SAINSBURY, TOFTS WALK				TESCO, MARKET STREET				SOMERFIELD, RAYNE ROAD				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	1	1	1	1	2	2	2	2	0	0	0	0	0	0	0	0	3	3	3	3
11	5	5	5	5	12	12	12	12	0	0	0	0	0	0	0	0	18	18	18	18
12	15	15	15	15	37	37	37	37	2	2	2	2	1	1	1	1	55	55	55	55
13	2	2	2	2	2	2	2	2	0	0	0	0	0	0	0	0	4	4	4	4
14	1	1	1	1	2	2	2	2	0	0	0	0	0	0	0	0	3	3	3	3
15	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0	1	1	1	1
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 24
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	J SAINSBURY, TOFTS WALK				TESCO, MARKET STREET				SOMERFIELD, RAYNE ROAD				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	317	348	383	421	0	0	0	0	317	348	383	421
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	427	441	456	470	585	604	623	644	0	0	0	0	0	0	0	0	1,012	1,045	1,079	1,114
11	1,714	1,763	1,810	1,859	3,843	3,951	4,058	4,167	141	145	149	153	141	145	149	153	5,839	6,003	6,165	6,332
12	13,441	13,923	14,403	14,899	33,614	34,820	36,020	37,260	2,145	2,222	2,299	2,378	958	993	1,027	1,062	50,158	51,959	53,748	55,600
13	741	791	844	901	741	791	844	901	176	188	201	214	0	0	0	0	1,659	1,770	1,889	2,016
14	561	578	595	613	1,107	1,142	1,176	1,211	0	0	0	0	0	0	0	0	1,668	1,720	1,771	1,824
15	0	0	0	0	280	259	310	370	0	0	0	0	0	0	0	0	280	259	310	370
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**16,884**	**17,496**	**18,108**	**18,742**	**40,170**	**41,567**	**43,030**	**44,553**	**2,779**	**2,903**	**3,031**	**3,165**	**1,099**	**1,138**	**1,176**	**1,215**	**60,933**	**63,103**	**65,345**	**67,676**

SOURCE: Tables 2 & 23

CONVENIENCE GOODS
BRAINTREE OUT OF CENTRE

Table 25
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

	TESCO'S, NOTLEY GREEN				TESCO'S, COGGESHALL ROAD			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0	1	1	1	1
2	1	1	1	1	0	0	0	0
3	0	0	0	0	0	0	0	0
4	0	0	0	0	1	1	1	1
5	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0
10	2	2	2	2	6	6	6	6
11	3	3	3	3	9	9	9	9
12	19	19	19	19	13	13	13	13
13	5	5	5	5	2	2	2	2
14	0	0	0	0	1	1	1	1
15	0	0	0	0	1	1	1	1
16	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 26
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

	TESCO'S, NOTLEY GREEN				TESCO'S, COGGESHALL ROAD			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0	871	949	994	1,042
2	414	440	470	501	0	0	0	0
3	0	0	0	0	0	0	0	0
4	0	0	0	0	333	365	399	436
5	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0
10	720	743	767	792	1,672	1,727	1,782	1,840
11	845	868	892	916	2,990	3,074	3,157	3,242
12	17,754	18,391	19,025	19,680	11,570	11,985	12,398	12,825
13	2,364	2,523	2,692	2,873	741	791	844	901
14	191	197	203	209	738	761	784	807
15	0	0	0	0	280	259	310	370
16	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0
TOTALS	**22,289**	**23,163**	**24,049**	**24,972**	**19,195**	**19,910**	**20,667**	**21,462**

SOURCE: Table 2 & 25

CONVENIENCE GOODS
HALSTEAD TOWN CENTRE

TABLE 27
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	SOMERFIELD, HIGH STREET				CO-OP, WEAVERS COURT				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	2	2	2	2	0	0	0	0	0	0	0	0	2	2	2	2
11	19	19	19	19	9	9	9	9	0	0	0	0	27	27	27	27
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 28
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	SOMERFIELD, HIGH STREET				CO-OP, WEAVERS COURT				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0	490	534	559	586	0	0	0	0	490	534	559	586
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	585	604	623	644	0	0	0	0	0	0	0	0	585	604	623	644
11	6,146	6,318	6,489	6,664	2,857	2,938	3,017	3,099	0	0	0	0	9,003	9,255	9,506	9,763
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**6,730**	**6,922**	**7,112**	**7,308**	**3,347**	**3,471**	**3,576**	**3,685**	**0**	**0**	**0**	**0**	**10,078**	**10,393**	**10,688**	**10,992**

SOURCE: Tables 2 & 27

CONVENIENCE GOODS
HALSTEAD OUT OF CENTRE

TABLE 29
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

	CO-OP, ABELS ROAD			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	1	1	1	1
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	2	2	2	2
11	11	11	11	11
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 30
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

	CO-OP, ABELS ROAD			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	490	534	559	586
2	0	0	0	0
3	0	0	0	0
4	167	182	199	218
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	643	699	758	821
10	562	581	599	619
11	3,570	3,670	3,769	3,871
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
TOTALS	**5,432**	**5,666**	**5,885**	**6,115**

SOURCE: Table 2 & 29

CONVENIENCE GOODS
WITHAM TOWN CENTRE

TABLE 31
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	TESCO, THE GROVE CENTRE				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0
10	1	1	1	1	0	0	0	0	1	1	1	1
11	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	50	50	50	50	1	1	1	1	51	51	51	51
15	7	7	7	7	0	0	0	0	8	8	8	8
16	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 32
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	TESCO, THE GROVE CENTRE				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0
10	427	441	456	470	0	0	0	0	427	441	456	470
11	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	27,315	28,162	29,002	29,866	738	761	784	807	28,053	28,924	29,786	30,674
15	1,899	1,759	2,103	2,514	120	111	133	159	2,019	1,870	2,236	2,672
16	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**29,641**	**30,363**	**31,560**	**32,850**	**858**	**872**	**917**	**966**	**30,499**	**31,235**	**32,477**	**33,816**

SOURCE: Tables 2 & 31

NORTH ESSEX RETAIL STUDY 2006

TABLE 32B

WITHAM RETAIL COMMITMENTS - CONVENIENCE GOODS

	Net Floorspace (sqm)	Net Convenience Ratio %	Net Convenience sq m	Company Average Sales (£ per sq m net)	Average Turnover (£000s)
Foodstore, Maltings Lane New Neighbourhood Centre	1,115	100	1,115	3,000	3,345

CONVENIENCE GOODS
WITHAM OUT OF CENTRE

TABLE 33
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

	MORRISONS, BRAINTREE ROAD			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	1	1	1	1
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	24	24	24	24
15	1	1	1	1
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 34
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

	MORRISONS, BRAINTREE ROAD			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	322	327	338	349
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	13,316	13,729	14,138	14,560
15	280	259	310	370
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
TOTALS	**13,918**	**14,315**	**14,786**	**15,279**

SOURCE: Table 2 & 33

NORTH ESSEX RETAIL STUDY 2006

BRAINTREE DISTRICT COUNCIL

TABLE 35
BRAINTREE CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Tesco, Market Place	4,318	90%	3,886	11,932	46,370
J Sainsbury, Tofts Walk	2,485	90%	2,237	10,041	22,457
Somerfield, Rayne Road	1,349	90%	1,214	4,728	5,740
Other	4,653	95%	4,420	4,500	19,892
SUB-TOTAL	**12,805**		**11,757**	**8,034**	**94,459**
OUT OF CENTRE					
Tesco, Coggelshall Road, Braintree	2,219	80%	1,775	11,932	21,182
Tesco, Notley Green, Great Notley	1,667	80%	1,334	11,932	15,913
SUB-TOTAL	**3,886**		**3,109**	**11,932**	**37,094**
TOTAL	**16,691**		**14,866**	**8,849**	**131,553**

TABLE 36
HALSTEAD CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Somerfield, High Street	929	95%	883	4,728	4,173
Co-Op Solar, Weavers Court	1,235	95%	1,173	3,575	4,194
Other	976	100%	976	3,000	2,928
SUB-TOTAL	**3,140**		**3,032**	**3,726**	**11,295**
OUT OF CENTRE					
Co-Op, Abels Road, Halstead	113	95%	107	3,575	384
TOTAL	**3,253**		**3,032**	**3,726**	**11,295**

TABLE 37
WITHAM CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Tesco, The Grove Centre	1,852	95%	1,759	11,932	20,993
Other	1,769	100%	1,769	3,000	5,307
SUB-TOTAL	**3,621**		**3,528**	**7,454**	**26,300**
OUT OF CENTRE					
Morrisons, Braintree Road, Witham	2,322	90%	2,090	12,259	25,619
TOTAL	**5,943**		**5,618**	**9,241**	**51,919**

TABLE 38
TOTAL CONVENIENCE GOODS FLOORSPACE

Store	Net Flsp (sqm)		Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOTAL	**25,887**		**23,516**	**8,282**	**194,767**

NORTH ESSEX RETAIL STUDY 2006

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 39
FUTURE SHOP FLOORSPACE CAPACITY IN BRAINTREE DISTRICT

	CONVENIENCE GOODS			
	2006	2011	2016	2021
Residents Spending (£000)	162,343	167,786	173,897	180,313
Existing Shop Floorspace (sq m net)	23,516	23,516	23,516	23,516
Sales per sq m net £	6,904	8,282	8,282	8,282
Sales from Existing Floorspace (£000)	162,343	194,767	194,767	194,767
Sales from Committed Floorspace (£000)	0	3,345	3,345	3,345
Residual Spending to Support new shops (£000)	0	-30,326	-24,215	-17,799
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	-3,033	-2,421	-1,780

NORTH ESSEX RETAIL STUDY 2006

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 40
FUTURE SHOP FLOORSPACE CAPACITY IN BRAINTREE URBAN AREA

	CONVENIENCE GOODS			
	2006	2011	2016	2021
Residents Spending (£000) (See Note A)	102,416	106,176	110,061	114,110
Existing Shop Floorspace (sq m net)	14,866	14,866	14,866	14,866
Sales per sq m net £	6,889	8,849	8,849	8,849
Sales from Existing Floorspace (£000)	102,416	131,553	131,553	131,553
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	-25,376	-21,492	-17,443
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	-2,538	-2,149	-1,744

A - Includes Braintree town centre / Tesco, Notley Green / Tesco, Coggeshall Road

NORTH ESSEX RETAIL STUDY 2006

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 41
FUTURE SHOP FLOORSPACE CAPACITY IN HALSTEAD

	CONVENIENCE GOODS			
	2006	2011	2016	2021
Residents Spending (£000)	15,509	16,059	16,573	17,107
Existing Shop Floorspace (sq m net)	3,032	3,032	3,032	3,032
Sales per sq m net £	5,116	3,726	3,726	3,726
Sales from Existing Floorspace (£000)	15,509	11,295	11,295	11,295
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	4,764	5,278	5,812
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	476	528	581

NORTH ESSEX RETAIL STUDY 2006

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 42
FUTURE SHOP FLOORSPACE CAPACITY IN WITHAM

	CONVENIENCE GOODS			
	2006	2011	2016	2021
Residents Spending (£000)	44,417	45,550	47,263	49,096
Existing Shop Floorspace (sq m net)	5,618	5,618	5,618	5,618
Sales per sq m net £	7,906	9,241	9,241	9,241
Sales from Existing Floorspace (£000)	44,417	51,919	51,919	51,919
Sales from Committed Floorspace (£000)	0	3,345	3,345	3,345
Residual Spending to Support new shops (£000)	0	-9,714	-8,001	-6,168
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	-971	-800	-617

CONVENIENCE GOODS
MALDON TOWN CENTRE

TABLE 43
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	BUDGENS, HIGH STREET 2006 (%)	2011 (%)	2016 (%)	2021 (%)	OTHER TOWN CENTRE CONVENIENCE 2006 (%)	2011 (%)	2016 (%)	2021 (%)	TOTAL 2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	1	1	1	1	1	1	1	1
3	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0
18	1	1	1	1	3	3	3	3	4	4	4	4
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 44
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	BUDGENS, HIGH STREET 2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	OTHER TOWN CENTRE CONVENIENCE 2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	TOTAL 2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	787	836	892	952	787	836	892	952
3	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	346	377	408	442	346	377	408	442
10	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0
18	754	792	829	868	1,509	1,584	1,659	1,737	2,263	2,377	2,488	2,605
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**754**	**792**	**829**	**868**	**2,642**	**2,797**	**2,959**	**3,131**	**3,396**	**3,589**	**3,788**	**3,999**

SOURCE: Tables 2 & 43

CONVENIENCE GOODS
MALDON OUT OF CENTRE

Table 45
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

	TESCO, FULLBRIDGE				MORRISONS, LIMEBROOK WAY			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0
14	2	2	2	2	0	0	0	0
15	3	3	3	3	0	0	0	0
16	0	0	0	0	0	0	0	0
17	0	0	0	0	2	2	2	2
18	57	57	57	57	15	15	15	15
19	18	18	18	18	13	13	13	13
20	22	22	22	22	11	11	11	11

SOURCE: North Essex Telephone Survey, September 2005

TABLE 46
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

	TESCO, FULLBRIDGE				MORRISONS, LIMEBROOK WAY			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	327	356	373	391	0	0	0	0
2	0	0	0	0	0	0	0	0
3	160	170	182	194	0	0	0	0
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0
14	1,299	1,339	1,379	1,420	0	0	0	0
15	680	630	753	900	0	0	0	0
16	59	62	66	70	0	0	0	0
17	0	0	0	0	199	203	209	214
18	30,343	31,869	33,365	34,931	7,847	8,242	8,629	9,034
19	3,442	3,620	3,793	3,974	2,503	2,633	2,758	2,890
20	8,764	9,134	9,512	9,906	4,585	4,778	4,976	5,182
TOTALS	**45,072**	**47,180**	**49,422**	**51,786**	**15,134**	**15,856**	**16,572**	**17,320**

SOURCE: Table 2 & 46

CONVENIENCE GOODS
BURNHAM-ON-CROUCH TOWN CENTRE

TABLE 47
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	CO-OP, FOUNDRY LANE				TESCO EXPRESS, STATION ROAD				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	10	10	10	10	5	5	5	5	0	0	0	0	15	15	15	15

SOURCE: North Essex Telephone Survey, September 2005

TABLE 48
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	CO-OP, FOUNDRY LANE				TESCO EXPRESS, STATION ROAD				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	160	170	182	194	0	0	0	0	0	0	0	0	160	170	182	194
4	167	182	199	218	167	182	199	218	0	0	0	0	333	365	399	436
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	4,250	4,429	4,613	4,804	1,887	1,966	2,048	2,133	0	0	0	0	6,137	6,396	6,661	6,936
TOTALS	**4,577**	**4,782**	**4,994**	**5,216**	**2,053**	**2,149**	**2,247**	**2,350**	**0**	**0**	**0**	**0**	**6,630**	**6,931**	**7,241**	**7,567**

SOURCE: Tables 2 & 47

CONVENIENCE GOODS
BENTALL SHOPPING CENTRE, HEYBRIDGE

TABLE 49
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	NETTO 2006 (%)	NETTO 2011 (%)	NETTO 2016 (%)	NETTO 2021 (%)	TESCO EXPRESS 2006 (%)	TESCO EXPRESS 2011 (%)	TESCO EXPRESS 2016 (%)	TESCO EXPRESS 2021 (%)	TOTAL 2006 (%)	TOTAL 2011 (%)	TOTAL 2016 (%)	TOTAL 2021 (%)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0
18	2	2	2	2	3	3	3	3	4	4	4	4
19	0	0	0	0	0	0	0	0	0	0	0	0
20	1	1	1	1	0	0	0	0	1	1	1	1

SOURCE: North Essex Telephone Survey, September 2005

TABLE 50
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	NETTO 2006 (£000)	NETTO 2011 (£000)	NETTO 2016 (£000)	NETTO 2021 (£000)	TESCO EXPRESS 2006 (£000)	TESCO EXPRESS 2011 (£000)	TESCO EXPRESS 2016 (£000)	TESCO EXPRESS 2021 (£000)	TOTAL 2006 (£000)	TOTAL 2011 (£000)	TOTAL 2016 (£000)	TOTAL 2021 (£000)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0
18	807	848	888	929	1,350	1,418	1,484	1,554	2,157	2,265	2,372	2,483
19	0	0	0	0	0	0	0	0	0	0	0	0
20	578	603	628	654	0	0	0	0	578	603	628	654
TOTALS	**1,385**	**1,450**	**1,515**	**1,583**	**1,350**	**1,418**	**1,484**	**1,554**	**2,735**	**2,868**	**2,999**	**3,137**

SOURCE: Tables 2 & 49

NORTH ESSEX RETAIL STUDY 2006

MALDON DISTRICT COUNCIL

TABLE 51
MALDON CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Iceland, High Street	553	100%	553	4,717	2,609
Budgens, High Street	553	100%	553	4,086	2,260
Other	766	95%	728	4,000	2,911
SUB-TOTAL	**1,872**		**1,834**	**4,242**	**7,779**
OUT OF CENTRE					
Tesco, Fullbridge	4,520	80%	3,616	11,932	43,146
Morrisons, Limebrook Way	2,443	90%	2,199	12,259	26,954
SUB-TOTAL	**6,963**		**5,815**	**12,056**	**70,100**
TOTAL	**8,835**		**7,648**	**10,182**	**77,879**

TABLE 52
BURNHAM-ON-CROUCH CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Tesco Express, Station Road	245	100%	245	11,932	2,923
Co-Op, Foundry Lane	1,130	95%	1,074	3,575	3,838
Other	225	100%	225	3,000	675
TOTAL	**1,600**		**1,544**	**4,818**	**7,436**

TABLE 53
BENTALL SHOPPING CENTRE, HEYBRIDGE CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Netto, The Bentall Centre	200	100%	200	4,024	805
Tesco Express, The Bentall Centre	146	100%	146	11,932	1,742
TOTAL	**346**		**346**	**7,361**	**2,547**

TABLE 54
TOTAL CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)		Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOTAL	**10,781**		**9,538**	**9,212**	**87,862**

NORTH ESSEX RETAIL STUDY 2006

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 55
FUTURE SHOP FLOORSPACE CAPACITY IN MALDON DISTRICT

	CONVENIENCE GOODS			
	2006	2011	2016	2021
Residents Spending (£000)	72,967	76,423	80,023	83,808
Existing Shop Floorspace (sq m net)	9,538	9,538	9,538	9,538
Sales per sq m net £	7,650	9,212	9,212	9,212
Sales from Existing Floorspace (£000)	72,967	87,862	87,862	87,862
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	-11,438	-7,839	-4,054
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	-1,144	-784	-405

NORTH ESSEX RETAIL STUDY 2006

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 56
FUTURE SHOP FLOORSPACE CAPACITY IN MALDON URBAN AREA

	CONVENIENCE GOODS			
	2006	2011	2016	2021
Residents Spending (£000) (See Note A)	66,337	69,493	72,782	76,242
Existing Shop Floorspace (sq m net)	7,994	7,994	7,994	7,994
Sales per sq m net £	8,298	10,060	10,060	10,060
Sales from Existing Floorspace (£000)	66,337	80,426	80,426	80,426
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	-10,933	-7,644	-4,184
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	-1,093	-764	-418

A - Includes all town centre foodstores, plus out of centre Tesco, Fullbridge and Morrisons, Limebrook Way and the Bentall Centre

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 57
FUTURE SHOP FLOORSPACE CAPACITY IN BURNHAM-ON-CROUCH

	CONVENIENCE GOODS			
	2006	2011	2016	2021
Residents Spending (£000)	6,630	6,931	7,241	7,567
Existing Shop Floorspace (sq m net)	1,544	1,544	1,544	1,544
Sales per sq m net £	4,295	4,818	4,818	4,818
Sales from Existing Floorspace (£000)	6,630	7,436	7,436	7,436
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	-505	-195	130
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	-51	-19	13

CONVENIENCE GOODS
CLACTON-ON-SEA TOWN CENTRE

TABLE 58
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	SOMERFIELD, HIGH STREET				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	6	6	6	6	3	3	3	3	9	9	9	9
8	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 59
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	SOMERFIELD, HIGH STREET				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	167	182	199	218	167	182	199	218
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	6,387	6,787	7,269	7,786	3,665	3,894	4,171	4,468	10,052	10,681	11,440	12,254
8	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**6,387**	**6,787**	**7,269**	**7,786**	**3,832**	**4,077**	**4,371**	**4,686**	**10,219**	**10,863**	**11,640**	**12,472**

SOURCE: Tables 2 & 58

CONVENIENCE GOODS
CLACTON-ON-SEA OUT OF CENTRE

Table 60

CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

	MORRISONS, WATERGLADE				TESCO, BROOK RETAIL PARK				TESCO EXPRESS, THORPE-LE-SOKEN				MORRISONS, CENTENARY WAY				SOMERFIELD, NORTH ROAD				TOTAL			
Catchment	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	4	4	4	4	0	0	0	0	4	4	4	4	0	0	0	0	8	8	8	8
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	2	2	2	2	24	24	24	24	2	2	2	2	13	13	13	13	0	0	0	0	42	42	42	42
7	13	13	13	13	30	30	30	30	2	2	2	2	21	21	21	21	9	9	9	9	75	75	75	75
8	0	0	0	0	2	2	2	2	0	0	0	0	2	2	2	2	0	0	0	0	4	4	4	4
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 61

CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

	MORRISONS, WATERGLADE				TESCO, BROOK RETAIL PARK				TESCO EXPRESS, THORPE-LE-SOKEN				MORRISONS, CENTENARY WAY				SOMERFIELD, NORTH ROAD				TOTAL			
Catchment	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021	2006	2011	2016	2021
Zone	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	594	631	673	718	0	0	0	0	0	0	0	0	0	0	0	0	594	631	673	718
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	2,083	2,279	2,491	2,722	0	0	0	0	2,083	2,279	2,491	2,722	0	0	0	0	4,167	4,559	4,982	5,444
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	644	654	676	699	7,502	7,618	7,873	8,137	1,057	1,280	1,577	1,942	3,997	4,058	4,194	4,335	0	0	0	0	13,201	13,611	14,320	15,113
7	14,256	15,148	16,225	17,379	32,636	34,677	37,143	39,785	2,786	3,529	4,505	5,752	22,395	23,796	25,488	27,301	9,379	9,965	10,674	11,433	81,453	87,115	94,036	101,649
8	0	0	0	0	251	268	287	308	0	0	0	0	251	268	287	308	0	0	0	0	502	536	575	616
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**14,901**	**15,802**	**16,901**	**18,078**	**43,067**	**45,474**	**48,468**	**51,670**	**3,844**	**4,809**	**6,082**	**7,695**	**28,726**	**30,402**	**32,461**	**34,665**	**9,379**	**9,965**	**10,674**	**11,433**	**99,916**	**106,452**	**114,586**	**123,540**

SOURCE: Table 2 & 60

CONVENIENCE GOODS
FRINTON TOWN CENTRE

TABLE 62
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	CO-OP, CONNAUGHT AVENUE			
	2006	2011	2016	2021
	(%)	(%)	(%)	(%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	17	17	17	17
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 63
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	CO-OP, CONNAUGHT AVENUE			
	2006	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	5,224	5,305	5,482	5,666
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	135	139	144	149
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
TOTALS	**5,359**	**5,444**	**5,626**	**5,814**

SOURCE: Tables 2 & 62

CONVENIENCE GOODS
HARWICH TOWN CENTRE

TABLE 64
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	TOWN CENTRE CONVENIENCE 2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	1	1	1	1
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 65
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	TOWN CENTRE CONVENIENCE 2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	476	522	574	631
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
TOTALS	**476**	**522**	**574**	**631**

SOURCE: Tables 2 & 64

CONVENIENCE GOODS
HARWICH OUT OF CENTRE

TABLE 66
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	MORRISONS, ICONFIELD PARK, GARLAND RD			
	2006	2011	2016	2021
	(%)	(%)	(%)	(%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	2	2	2	2
5	54	54	54	54
6	1	1	1	1
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 67
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	MORRISONS, ICONFIELD PARK, GARLAND RD			
	2006	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	833	912	996	1,089
5	22,624	24,829	27,291	29,997
6	322	327	338	349
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
TOTALS	**23,780**	**26,068**	**28,626**	**31,436**

SOURCE: Tables 2 & 66

CONVENIENCE GOODS
DOVERCOURT TOWN CENTRE

TABLE 68
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

	SOMERFIELD, HIGH STREET			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	10	10	10	10
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 69
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

	SOMERFIELD, HIGH STREET			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	4,208	4,618	5,076	5,579
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
TOTALS	**4,208**	**4,618**	**5,076**	**5,579**

SOURCE: Table 2 & 68

CONVENIENCE GOODS
BRIGHTLINGSEA TOWN CENTRE

TABLE 70
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

	CO-OP, STATION ROAD				OTHER TOWN CENTRE CONVENIENCE			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	5	5	5	5	1	1	1	1
5	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0
8	2	2	2	2	0	0	0	0
9	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 71
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

	CO-OP, STATION ROAD				OTHER TOWN CENTRE CONVENIENCE			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	2,917	3,191	3,487	3,811	667	729	797	871
5	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0
8	251	268	287	308	0	0	0	0
9	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0
TOTALS	**3,168**	**3,459**	**3,775**	**4,119**	**667**	**729**	**797**	**871**

SOURCE: Table 2 & 70

CONVENIENCE GOODS
MANNINGTREE TOWN CENTRE

TABLE 72
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

	CO-OP, RIVERSIDE AVE, MANNINGTREE				OTHER TOWN CENTRE CONVENIENCE			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	1	1	1	1	0	0	0	0
4	7	7	7	7	0	0	0	0
5	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 73
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

	CO-OP, RIVERSIDE AVE, MANNINGTREE				OTHER TOWN CENTRE CONVENIENCE			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	544	579	619	661	0	0	0	0
4	3,653	3,997	4,367	4,773	167	182	199	218
5	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0
7	0	0	0	0	189	200	215	230
8	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0
TOTALS	**4,196**	**4,576**	**4,986**	**5,434**	**355**	**383**	**414**	**448**

SOURCE: Table 2 & 72

CONVENIENCE GOODS
WALTON-ON-THE-NAZE TOWN CENTRE

TABLE 74
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

	CO-OP			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	5	5	5	5
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 75
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2003 PRICES

	CO-OP			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	1,442	1,464	1,513	1,564
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
TOTALS	**1,442**	**1,464**	**1,513**	**1,564**

SOURCE: Table 2 & 74

NORTH ESSEX RETAIL STUDY 2006

TENDRING DISTRICT COUNCIL

TABLE 76
CLACTON-ON-SEA CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Somerfield, High Street	1,621	95%	1,540	4,728	7,281
Marks & Spencer, Pier Avenue	836	95%	794	10,000	7,942
Other	359	95%	341	3,000	1,023
SUB-TOTAL	**2,816**		**2,675**	**6,073**	**16,246**
OUT OF CENTRE					
Morrisons, Waterglade Retail Park	2,517	85%	2,139	12,259	26,228
Somerfield, North Road	1,415	95%	1,344	4,728	6,356
Morrisons, Centenary Way	2,358	85%	2,004	12,259	24,571
Tesco, Brook Retail Park	4,900	85%	4,165	11,932	49,697
Tesco Express, Thorpe Le Soken	136	95%	129	11,932	1,542
SUB-TOTAL	**11,326**		**9,782**	**11,081**	**108,392**
TOTAL	**14,142**		**12,457**	**10,005**	**124,638**

Other includes Marks & Spencer, Pier Avenue

TABLE 77
FRINTON CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Co-Op, Connaught Avenue	1,257	90%	1,131	3,575	4,044
Other	138	100%	138	3,000	414
TOTAL	**1,395**		**1,269**	**3,512**	**4,458**

TABLE 78
HARWICH CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Small Scale Provision	299	100%	299	3,000	897
OUT OF CENTRE					
Morrisons, Iconfield Park, Garland Road	1,881	90%	1,693	12,259	20,753
TOTAL	**2,180**		**1,992**	**10,869**	**21,650**

TABLE 79
DOVERCOURT CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
Somerfield, High Street	582	95%	553	4,728	2,614
Other	686	100%	686	4,500	3,087
SUB-TOTAL	**1,268**		**1,239**	**4,602**	**5,701**
OUT OF CENTRE					
Co-Op, Main Road, Dovercourt	1,115	95%	1,059	3,575	3,787
TOTAL	**2,383**		**2,298**	**4,129**	**9,488**

TABLE 80
BRIGHTLINGSEA CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Co-Op, Station Road	493	90%	444	3,575	1,586
Other	1,706	100%	1,706	3,000	5,118
TOTAL	**2,199**		**2,150**	**3,119**	**6,704**

TABLE 81
MANNINGTREE CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Co-Op, Riverside Avenue	1,115	90%	1,004	3,575	3,588
Other	225	100%	225	3,000	675
TOTAL	**1,340**		**1,229**	**3,470**	**4,263**

TABLE 82
WALTON-ON-THE-NAZE CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Co-Op	273	100%	273	3,575	976
TOTAL	**273**		**273**	**3,575**	**976**

TABLE 83
TOTAL CONVENIENCE GOODS FLOORSPACE

Store	Net Flsp (sqm)		Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOTAL	**23,912**		**21,668**	**7,946**	**172,178**

NORTH ESSEX RETAIL STUDY 2006

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 84
FUTURE SHOP FLOORSPACE CAPACITY IN TENDRING DISTRICT

	CONVENIENCE GOODS			
	2006	2011	2016	2021
Residents Spending (£000)	153,785	164,579	177,613	191,908
Existing Shop Floorspace (sq m net)	21,668	21,668	21,668	21,668
Sales per sq m net £	7,097	7,946	7,946	7,946
Sales from Existing Floorspace (£000)	153,785	172,178	172,178	172,178
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	-7,598	5,435	19,730
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	-760	544	1,973

NORTH ESSEX RETAIL STUDY 2006

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 85
FUTURE SHOP FLOORSPACE CAPACITY IN CLACTON URBAN AREA

	CONVENIENCE GOODS			
	2006	2011	2016	2021
Residents Spending (£000) (See Note A)	110,135	117,315	126,226	136,012
Existing Shop Floorspace (sq m net)	12,457	12,457	12,457	12,457
Sales per sq m net £	8,841	10,005	10,005	10,005
Sales from Existing Floorspace (£000)	110,135	124,638	124,638	124,638
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	-7,323	1,587	11,374
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	-732	159	1,137

A - Includes Clacton-on-Sea Town Centre / Morrisons, Waterglade / Tesco, Brook Retail Park / Tesco, Thorpe-Le-Soken / Morrisons, Centenary Way / Somerfield, North Road

NORTH ESSEX RETAIL STUDY 2006

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 86
FUTURE SHOP FLOORSPACE CAPACITY IN FRINTON/WALTON

	CONVENIENCE GOODS			
	2006	2011	2016	2021
Residents Spending (£000) (See Note A)	6,801	6,909	7,140	7,379
Existing Shop Floorspace (sq m net)	1,542	1,542	1,542	1,542
Sales per sq m net £	4,410	3,524	3,524	3,524
Sales from Existing Floorspace (£000)	6,801	5,434	5,434	5,434
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	1,474	1,705	1,944
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	147	171	194

A - Includes Frinton Town Centre / Walton Town Centre

NORTH ESSEX RETAIL STUDY 2006

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 87
FUTURE SHOP FLOORSPACE CAPACITY IN HARWICH/DOVERCOURT

	CONVENIENCE GOODS			
	2006	2011	2016	2021
Residents Spending (£000) (See Note A)	28,463	31,208	34,275	37,645
Existing Shop Floorspace (sq m net)	4,290	4,290	4,290	4,290
Sales per sq m net £	6,635	7,258	7,258	7,258
Sales from Existing Floorspace (£000)	28,463	31,138	31,138	31,138
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	70	3,137	6,507
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	7	314	651

A - Includes Harwich Town Centre / Morrisons, Gateway Retail Park / Dovercourt Town Centre

NORTH ESSEX RETAIL STUDY 2006

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 88
FUTURE SHOP FLOORSPACE CAPACITY IN BRIGHTLINGSEA

	CONVENIENCE GOODS			
	2006	2011	2016	2021
Residents Spending (£000)	3,834	4,189	4,572	4,990
Existing Shop Floorspace (sq m net)	2,150	2,150	2,150	2,150
Sales per sq m net £	1,784	3,119	3,119	3,119
Sales from Existing Floorspace (£000)	3,834	6,704	6,704	6,704
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	-2,515	-2,132	-1,714
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	-252	-213	-171

NORTH ESSEX RETAIL STUDY 2006

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 89
FUTURE SHOP FLOORSPACE CAPACITY IN MANNINGTREE

	CONVENIENCE GOODS			
	2006	2011	2016	2021
Residents Spending (£000)	4,552	4,958	5,400	5,882
Existing Shop Floorspace (sq m net)	1,229	1,229	1,229	1,229
Sales per sq m net £	3,705	3,470	3,470	3,470
Sales from Existing Floorspace (£000)	4,552	4,263	4,263	4,263
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	696	1,138	1,619
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	70	114	162

NORTH ESSEX RETAIL STUDY 2006

GLOBAL CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 90
FUTURE SHOP FLOORSPACE CAPACITY IN NORTH ESSEX

	CONVENIENCE GOODS			
	2006	2011	2016	2021
Residents Spending (£000)	639,496	676,031	721,341	770,619
Existing Shop Floorspace (sq m net)	79,305	79,305	79,305	79,305
Sales per sq m net £	8,064	8,719	8,719	8,719
Sales from Existing Floorspace (£000)	639,496	691,439	691,439	691,439
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	-15,407	29,902	79,180
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	-1,541	2,990	7,918

APPENDIX 5

CAPACITY PROJECTIONS: COMPARISON GOODS

NORTH ESSEX RETAIL STUDY 2006

TABLE 1

SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	2006	2011	2016	2021
1	CB9 0/7/8/9; CB10 2; CO10 8; CO9 4	44,662	46,991	47,550	48,116
2	CO10 0/1/2/7/9	34,009	34,878	35,941	37,036
3	CO10 5; CO6 5; CO7 6; IP7 5/6; IP8 3	26,244	26,994	27,858	28,750
4	CO11 1/2; CO7 0/7/8	34,195	36,132	38,131	40,241
5	CO12 3/4/5; CO16 0	26,029	27,587	29,283	31,083
6	CO13 0/9; CO14 8	18,887	18,521	18,485	18,449
7	CO15 1/2/3/4/5/6; CO16 7/8/9	66,352	68,085	70,427	72,850
8	CO7 9	7,626	7,873	8,148	8,433
9	CO1 1/2; CO2 7/8/9; CO3 0/3/4/8/9; CO4 0/3/5/9; CO6 3/4	121,789	127,906	133,867	140,106
10	CO6 1/2; CO8 5	18,459	18,409	18,352	18,295
11	CO9 1/2/3	20,392	20,245	20,080	19,916
12	CM7 1/2/3/4/5/9; CM77 6/7/8	56,184	56,206	56,149	56,092
13	CM3 1/3; CM6 1/2/3	28,961	29,841	30,756	31,699
14	CM3 2; CM8 1/2/3	33,659	33,514	33,330	33,147
15	CO5 0/9	16,405	14,676	16,942	19,558
16	CO2 0; CO5 7	9,024	9,261	9,502	9,749
17	CO5 8	7,089	7,008	6,940	6,873
18	CM9 4/5/6; CM9 8	32,580	33,046	33,411	33,780
19	CM3 4/8	11,852	12,037	12,180	12,325
20	CM0 7/8; CM3 6	24,973	25,135	25,279	25,424
TOTAL		**639,371**	**654,345**	**672,611**	**691,921**

SOURCE: Experian Business Solutions, January 2006

TABLE 1A

POPULATION GROWTH RATES

GROWTH RATES			
2006-2011 (%)	2011-2016 (%)	2016-2021 (%)	2006-2021 (%)
5	1	1	8
3	3	3	9
3	3	3	10
6	6	6	18
6	6	6	19
-2	0	0	-2
3	3	3	10
3	3	3	11
5	5	5	15
0	0	0	-1
-1	-1	-1	-2
0	0	0	0
3	3	3	9
0	-1	-1	-2
-11	15	15	19
3	3	3	8
-1	-1	-1	-3
1	1	1	4
2	1	1	4
1	1	1	2
2	**3**	**3**	**8**

NORTH ESSEX RETAIL STUDY 2006

TABLE 2

SURVEY AREA RETAIL EXPENDITURE FORECASTS (2003 prices)

PER CAPITA EXPENDITURE	2003	2006	2011	2016	2021
	(£)	(£)	(£)	(£)	(£)
Convenience Goods	1,591	1,625	1,682	1,742	1,804
Comparison Goods	2,350	2,666	3,291	4,062	5,013

GROWTH IN PER CAPITA RETAIL EXPENDITURE:

Convenience Goods: 0.70 % pa 2003 - 2021

Comparison Goods: 4.30 % pa 2003 - 2021

	CONVENIENCE GOODS				COMPARISON GOODS			
	2006	2011	2016	2021	2006	2011	2016	2021
ZONE	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	72,560	79,054	82,834	86,794	119,070	154,633	193,134	241,222
2	55,253	58,676	62,610	66,809	90,669	114,773	145,982	185,678
3	42,638	45,413	48,530	51,860	69,967	88,829	113,151	144,133
4	55,555	60,786	66,425	72,589	91,165	118,899	154,877	201,741
5	42,288	46,410	51,012	56,070	69,394	90,780	118,939	155,832
6	30,685	31,158	32,201	33,280	50,353	60,947	75,081	92,492
7	107,799	114,541	122,686	131,411	176,897	224,047	286,054	365,223
8	12,390	13,245	14,194	15,211	20,331	25,908	33,095	42,276
9	197,865	215,179	233,201	252,732	324,694	420,900	543,729	702,404
10	29,990	30,970	31,970	33,002	49,212	60,578	74,541	91,721
11	33,130	34,059	34,980	35,926	54,366	66,620	81,559	99,848
12	91,280	94,557	97,813	101,182	149,789	184,957	228,061	281,211
13	47,052	50,202	53,578	57,181	77,211	98,198	124,922	158,919
14	54,684	56,381	58,062	59,793	89,736	110,284	135,377	166,179
15	26,653	24,690	29,514	35,280	43,736	48,294	68,814	98,051
16	14,661	15,580	16,553	17,586	24,058	30,475	38,594	48,877
17	11,517	11,790	12,090	12,397	18,900	23,061	28,188	34,455
18	52,931	55,594	58,203	60,935	86,859	108,744	135,706	169,352
19	19,255	20,250	21,218	22,232	31,598	39,610	49,472	61,788
20	40,573	42,285	44,037	45,861	66,579	82,712	102,676	127,459
TOTAL	**1,038,759**	**1,100,819**	**1,171,711**	**1,248,131**	**1,704,586**	**2,153,249**	**2,731,952**	**3,468,861**

Source: Experian Business Solutions, January 2006

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
COLCHESTER TOWN CENTRE

TABLE 3
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	COLCHESTER TOWN CENTRE			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	1	1	1	1
2	23	23	23	23
3	17	17	17	17
4	44	44	44	44
5	39	39	39	39
6	23	23	23	23
7	19	19	19	19
8	55	55	55	55
9	56	56	56	56
10	43	43	43	43
11	27	27	27	27
12	4	4	4	4
13	0	0	0	0
14	6	6	6	6
15	50	50	50	50
16	70	70	70	70
17	54	54	54	54
18	4	4	4	4
19	1	1	1	1
20	1	1	1	1

SOURCE: North Essex Telephone Survey, September 2005

TABLE 4
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	COLCHESTER TOWN CENTRE			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	812	1,054	1,317	1,645
2	20,878	26,428	33,615	42,755
3	12,121	15,389	19,603	24,970
4	40,041	52,223	68,025	88,608
5	26,953	35,259	46,196	60,526
6	11,586	14,024	17,276	21,282
7	32,794	41,536	53,031	67,708
8	11,105	14,151	18,077	23,091
9	180,480	233,956	302,230	390,429
10	21,029	25,886	31,853	39,194
11	14,766	18,094	22,151	27,118
12	6,738	8,321	10,260	12,651
13	0	0	0	0
14	5,546	6,816	8,367	10,271
15	21,966	24,255	34,560	49,244
16	16,928	21,443	27,156	34,391
17	10,294	12,560	15,353	18,766
18	3,102	3,883	4,846	6,047
19	181	227	284	354
20	539	670	832	1,032
Total	437,860	556,175	715,029	920,083

Source: Table 2 & 3

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
TIPTREE TOWN CENTRE

TABLE 5
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	TIPTREE TOWN CENTRE			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	3	3	3	3
16	0	0	0	0
17	1	1	1	1
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE:

TABLE 6
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	TIPTREE TOWN CENTRE			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	48	60	73	90
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	85	104	128	157
15	1,337	1,476	2,103	2,997
16	0	0	0	0
17	170	207	253	309
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
Total	1,640	1,847	2,558	3,554

Source: Table 2 & 5

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
WEST MERSEA TOWN CENTRE

TABLE 7
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	WEST MERSEA TOWN CENTRE			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	13	13	13	13
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE:

TABLE 8
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	WEST MERSEA TOWN CENTRE			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	2,469	3,012	3,682	4,501
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
Total	2,469	3,012	3,682	4,501

Source: Table 2 & 7

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
WIVENHOE TOWN CENTRE

TABLE 9
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	WIVENHOE TOWN CENTRE			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	6	6	6	6
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE:

TABLE 10
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	WIVENHOE TOWN CENTRE			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	260	340	443	576
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	1,196	1,524	1,947	2,488
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
Total	1,457	1,864	2,390	3,064

Source: Table 2 & 9

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
TURNER RISE RETAIL PARK

TABLE 11
COMPARISON GOODS ALLOCATION - MARKET SHARE %

Catchment Zone	TURNER RISE RETAIL PARK 2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	1	1	1	1
5	1	1	1	1
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	1	1	1	1
10	1	1	1	1
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 12
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	TURNER RISE RETAIL PARK 2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	1,036	1,351	1,760	2,293
5	636	832	1,090	1,427
6	109	132	163	201
7	0	0	0	0
8	0	0	0	0
9	2,635	3,415	4,412	5,699
10	271	334	411	505
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	71	87	106	130
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
Total	4,758	6,151	7,942	10,256

Source: Table 2 & 11

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
COLCHESTER RETAIL PARK

TABLE 13
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	COLCHESTER RETAIL PARK			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	2	2	2	2
5	1	1	1	1
6	2	2	2	2
7	0	0	0	0
8	1	1	1	1
9	2	2	2	2
10	2	2	2	2
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	1	1	1	1
17	1	1	1	1
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 14
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	COLCHESTER RETAIL PARK			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	109	138	176	224
3	0	0	0	0
4	1,648	2,149	2,799	3,646
5	793	1,037	1,359	1,780
6	788	953	1,174	1,447
7	604	766	977	1,248
8	110	141	180	230
9	5,953	7,717	9,969	12,878
10	756	930	1,145	1,408
11	180	221	270	331
12	361	446	550	679
13	0	0	0	0
14	0	0	0	0
15	218	241	344	490
16	135	170	216	273
17	160	195	238	291
18	151	189	236	295
19	91	114	142	177
20	0	0	0	0
Total	12,056	15,407	19,774	25,395

Source: Table 2 & 13

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
THE TOLLGATE RETAIL PARK

TABLE 15
COMPARISON GOODS ALLOCATION - MARKET SHARE %

Catchment Zone	TOLLGATE RETAIL PARK 2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	1	1	1	1
2	1	1	1	1
3	3	3	3	3
4	7	7	7	7
5	3	3	3	3
6	2	2	2	2
7	1	1	1	1
8	13	13	13	13
9	15	15	15	15
10	21	21	21	21
11	4	4	4	4
12	2	2	2	2
13	0	0	0	0
14	0	0	0	0
15	19	19	19	19
16	10	10	10	10
17	11	11	11	11
18	0	0	0	0
19	0	0	0	0
20	1	1	1	1

SOURCE: North Essex Telephone Survey, September 2005

TABLE 16
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	TOLLGATE RETAIL PARK 2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	807	1,048	1,309	1,635
2	780	987	1,255	1,597
3	2,363	2,999	3,821	4,867
4	6,138	8,006	10,428	13,584
5	2,125	2,780	3,642	4,772
6	1,145	1,385	1,707	2,103
7	1,573	1,992	2,543	3,247
8	2,578	3,285	4,196	5,360
9	48,217	62,504	80,744	104,308
10	10,122	12,460	15,332	18,865
11	2,293	2,810	3,440	4,211
12	2,770	3,421	4,218	5,201
13	256	326	414	527
14	443	544	668	820
15	8,104	8,948	12,750	18,168
16	2,451	3,105	3,933	4,980
17	2,029	2,476	3,027	3,699
18	97	122	152	189
19	0	0	0	0
20	498	619	768	953
Total	94,789	119,817	154,347	199,086

Source: Table 2 & 15

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
COLNE VIEW RETAIL PARK

TABLE 17
COMPARISON GOODS ALLOCATION - MARKET SHARE %

Catchment Zone	COLNE VIEW RETAIL PARK 2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	1	1	1	1
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	1	1	1	1
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 18
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	COLNE VIEW RETAIL PARK 2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	614	801	1,044	1,359
5	0	0	0	0
6	0	0	0	0
7	187	237	302	386
8	0	0	0	0
9	1,025	1,328	1,716	2,217
10	271	334	411	505
11	217	266	326	399
12	152	188	231	285
13	0	0	0	0
14	149	183	225	276
15	141	156	222	317
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	70	87	108	134
Total	2,826	3,580	4,585	5,878

Source: Table 2 & 17

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
FREESTANDING RETAIL WAREHOUSES

TABLE 19
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	COLCHESTER - FREESTANDING RETAIL WAREHOUSING			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	1	1	1	1
3	1	1	1	1
4	4	4	4	4
5	2	2	2	2
6	0	0	0	0
7	0	0	0	0
8	9	9	9	9
9	5	5	5	5
10	6	6	6	6
11	1	1	1	1
12	0	0	0	0
13	0	0	0	0
14	1	1	1	1
15	4	4	4	4
16	4	4	4	4
17	6	6	6	6
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 20
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	COLCHESTER FREESTANDING RETAIL WAREHOUSING			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	429	557	696	869
2	477	604	768	977
3	708	899	1,145	1,458
4	3,750	4,891	6,371	8,299
5	1,092	1,428	1,871	2,452
6	117	141	174	215
7	261	331	423	540
8	1,775	2,262	2,890	3,691
9	15,639	20,273	26,190	33,832
10	3,018	3,715	4,571	5,624
11	588	721	882	1,080
12	0	0	0	0
13	0	0	0	0
14	458	563	691	848
15	1,802	1,990	2,836	4,041
16	953	1,207	1,529	1,937
17	1,154	1,408	1,722	2,104
18	317	397	495	618
19	36	45	56	70
20	0	0	0	0
Total	32,575	41,433	53,309	68,655

Source: Table 2 & 19

NORTH ESSEX RETAIL STUDY 2006
FLOORSPACE SCHEDULE
COLCHESTER BOROUGH

TABLE 21

COLCHESTER TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Colchester Town Centre	41,665

Source: Experian Goad

TABLE 22

TIPTREE TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Tiptree Town Centre	650

Source: GVA Grimley Site Visit

TABLE 23

WIVENHOE TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Wivehoe Town Centre	315

Source: GVA Grimley Site Visit

TABLE 24

WEST MERSEA TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
West Mersea Town Centre	990

Source: GVA Grimley Site Visit

TABLE 25

TOTAL COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
TOTAL	112,308

NORTH ESSEX RETAIL STUDY 2006
FLOORSPACE SCHEDULE - COLCHESTER BOROUGH

TABLE 26

COLCHESTER RETAIL WAREHOUSING FLOORSPACE

	Net Floorspace Sq m	Sales Density £ per sq m	Turnover 2004 £000's
B&Q, Hythe Quay	6,240	2,051	12,798
Homebase, St Andrews Avenue	3,600	1,411	5,080
Homebase, Tollgate Road	3,252	1,411	4,589
Land of Leather, Tollgate Road	725	1,555	1,127
Sea Pets, Tollgate Road	511	2,151	1,099
Glyn Webb, St Andrews Avenue	1,971	728	1,435
Wickes, Clarendon Way	2,158	2,592	5,594
MFI, London Road	2,508	2,329	5,841
The Range, Cowdray Avenue	2,341	1,731	4,052
SUB-TOTAL	**23,306**	**1,786**	**41,615**
Colchester Retail Park			
Oddbins	325		
Blockbuster	325		
JJB Sport	1,022	4,048	4,137
Brantano	818	5,125	4,192
Matalan	2,583	2,405	6,212
SUB-TOTAL	**5,073**	**2,866**	**14,541**
Colne View Retail Park			
DFS	1,886	5,460	10,298
Staples	1,737	1,754	3,047
Pets at Home	978	2,151	2,104
Halfords	978	2,029	1,984
SUB-TOTAL	**5,579**	**3,125**	**17,432**
The Tollgate Retail Park			
AHF	1,994	2,154	4,295
Allied Carpets	929	1,170	1,087
Carpetright	1,015	1,268	1,287
Carpets4Less	648	1,076	697
Comet	1,858	6,133	11,395
Dreams	929	1,423	1,322
Harveys	613	1,300	797
Tiles R Us	650	1,279	831
Currys	1,285	4,599	5,910
PC World	1,575	6,783	10,683
Millers	754	4,743	3,576
Power House	482	2,602	1,254
Staples	1,023	1,754	1,794
SUB-TOTAL	**13,755**	**3,266**	**44,929**
Turner Rise Retail Park			
Vacant (previously Courts)	3,554		
Carpetright	750	1,268	951
DP Furniture Express	950	2,000	1,900
Floors-2-Go	583	1,103	643
Bathstore.com	456	2,000	912
Bennetts Electrical	1,259	6,948	8,748
Focus	3,110	948	2,948
SUB-TOTAL	**10,662**	**1,510**	**16,102**
Peartree Road, Stanway			
Vacant	1,793		
Paul Simon Curtains	849	1,000	849
Porcelanosa Tiles & Bathrooms	889	1,000	889
Topps Tiles	557	1,279	712
Hatfields Furniture	2,230	1,000	2,230
Mark Elliot Furniture	448	1,000	448
The Leather Gallery	655	1,500	983
Co-Operative Homemaker	1,628	1,500	2,442
World of Beds (Jayrest Centre)	1,264	1,000	1,264
SUB-TOTAL	**10,313**	**952**	**9,817**
TOTAL	**68,688**	**2,103**	**144,436**

Source: Trevor Wood Retail Warehouse Database / Essex Structure Plan Study 2001 / EGi

NORTH ESSEX RETAIL STUDY 2006

TABLE 27

FUTURE SHOP FLOORSPACE CAPACITY: COLCHESTER BOROUGH

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2.5	%pa '06-'21	
	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	1,704,586	2,153,249	2,731,952	3,468,861
Market Share from Survey Area	35	35	35	35
Survey Area Residents Spending (£000)	590,431	749,286	963,616	1,240,472
Inflow to ***Colchester Town Centre*** from Beyond Survey Area (14%) £000	71,280	90,540	116,400	149,781
TOTAL RETAIL TURNOVER IN COLCHESTER BOROUGH £000	**661,711**	**839,826**	**1,080,016**	**1,390,253**
Existing Shop Floorspace (sq m net)	112,308	112,308	112,308	112,308
Sales per sq m net £	5,892	6,666	7,542	8,533
Sales from Existing Floorspace (£000)	661,711	748,665	847,045	958,354
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	91,161	232,971	431,899
Sales per sq m net in new shops (£)	5,000	5,657	6,400	7,241
Capacity for new floorspace (sq m net)	0	16,115	36,399	59,642

TABLE 28
FUTURE SHOP FLOORSPACE CAPACITY: COLCHESTER URBAN AREA

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2.5	%pa '06-'21	
	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	1,704,586	2,153,249	2,731,952	3,468,861
Market Share from Survey Area	34	34	34	34
Survey Area Residents Spending (£000)	584,865	742,562	954,986	1,229,354
Inflow to ***Colchester Town Centre*** from Beyond Survey Area (14%) £000	71,280	90,540	116,400	149,781
TOTAL RETAIL TURNOVER IN COLCHESTER URBAN AREA £000	**656,145**	**833,102**	**1,071,386**	**1,379,135**
Existing Shop Floorspace (sq m net)	110,353	110,353	110,353	110,353
Sales per sq m net £	5,946	6,727	7,611	8,611
Sales from Existing Floorspace (£000)	656,145	742,368	839,921	950,294
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	90,734	231,465	428,841
Sales per sq m net in new shops (£)	5,000	5,657	6,400	7,241
Capacity for new floorspace (sq m net)	0	16,039	36,164	59,220

NORTH ESSEX RETAIL STUDY 2006

TABLE 29
FUTURE SHOP FLOORSPACE CAPACITY: TIPTREE TOWN CENTRE

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2.5	%pa '06-'21	
	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	1,704,586	2,153,249	2,731,952	3,468,861
Market Share from Survey Area	0	0	0	0
Survey Area Residents Spending (£000)	1,640	1,847	2,558	3,554
Existing Shop Floorspace (sq m net)	650	650	650	650
Sales per sq m net £	2,523	2,854	3,230	3,654
Sales from Existing Floorspace (£000)	1,640	1,855	2,099	2,375
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	-8	459	1,179
Sales per sq m net in new shops (£)	5,000	5,657	6,400	7,241
Capacity for new floorspace (sq m net)	0	-1	72	163

NORTH ESSEX RETAIL STUDY 2006

TABLE 30
FUTURE SHOP FLOORSPACE CAPACITY: WEST MERSEA TOWN CENTRE

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2.5	%pa '06-'21	
	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	1,704,586	2,153,249	2,731,952	3,468,861
Market Share from Survey Area	0	0	0	0
Survey Area Residents Spending (£000)	2,469	3,012	3,682	4,501
Existing Shop Floorspace (sq m net)	990	990	990	990
Sales per sq m net £	2,494	2,821	3,192	3,612
Sales from Existing Floorspace (£000)	2,469	2,793	3,160	3,575
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	219	522	925
Sales per sq m net in new shops (£)	5,000	5,657	6,400	7,241
Capacity for new floorspace (sq m net)	0	39	82	128

NORTH ESSEX RETAIL STUDY 2006

TABLE 31
FUTURE SHOP FLOORSPACE CAPACITY: WIVENHOE TOWN CENTRE

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2.5	%pa '06-'21	
	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	1,704,586	2,153,249	2,731,952	3,468,861
Market Share from Survey Area	0	0	0	0
Survey Area Residents Spending (£000)	1,457	1,864	2,390	3,064
Existing Shop Floorspace (sq m net)	315	315	315	315
Sales per sq m net £	4,625	5,233	5,920	6,698
Sales from Existing Floorspace (£000)	1,457	1,648	1,865	2,110
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	216	525	954
Sales per sq m net in new shops (£)	5,000	5,657	6,400	7,241
Capacity for new floorspace (sq m net)	0	38	82	132

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
BRAINTREE TOWN CENTRE

TABLE 32
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	BRAINTREE TOWN CENTRE			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	7	7	7	7
12	35	35	35	35
13	5	5	5	5
14	3	3	3	3
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 33
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	BRAINTREE TOWN CENTRE			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	451	571	729	930
8	0	0	0	0
9	0	0	0	0
10	171	211	259	319
11	3,570	4,375	5,356	6,557
12	51,985	64,190	79,150	97,596
13	3,475	4,419	5,622	7,152
14	2,359	2,899	3,559	4,369
15	112	124	176	251
16	0	0	0	0
17	0	0	0	0
18	151	189	236	295
19	0	0	0	0
20	0	0	0	0
Total	62,274	76,978	95,087	117,469

Source: Table 2 & 32

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
HALSTEAD TOWN CENTRE

TABLE 34
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	HALSTEAD TOWN CENTRE			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	2	2	2	2
11	13	13	13	13
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 35
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	HALSTEAD TOWN CENTRE			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	804	990	1,218	1,499
11	7,007	8,586	10,511	12,868
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
Total	7,811	9,576	11,729	14,367

Source: Table 2 & 34

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
WITHAM TOWN CENTRE

TABLE 36
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	WITHAM TOWN CENTRE			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	10	10	10	10
15	1	1	1	1
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	1	1	1	1

SOURCE: North Essex Telephone Survey, September 2005

TABLE 37
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	WITHAM TOWN CENTRE			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	168	217	281	363
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	374	476	605	770
14	8,744	10,746	13,191	16,192
15	654	722	1,029	1,467
16	0	0	0	0
17	88	108	132	161
18	0	0	0	0
19	0	0	0	0
20	379	470	584	725
Total	10,407	12,740	15,822	19,678

Source: Table 2 & 36

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
BRAINTREE FACTORY OUTLET

TABLE 38
COMPARISON GOODS ALLOCATION - MARKET SHARE %

Catchment Zone	BRAINTREE FACTORY OUTLET 2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	1	1	1	1
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	1	1	1	1
10	1	1	1	1
11	4	4	4	4
12	13	13	13	13
13	7	7	7	7
14	5	5	5	5
15	1	1	1	1
16	0	0	0	0
17	1	1	1	1
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 39
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	BRAINTREE FACTORY OUTLET 2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	937	1,217	1,520	1,898
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	524	664	848	1,082
8	0	0	0	0
9	1,684	2,183	2,820	3,643
10	570	701	863	1,062
11	2,253	2,760	3,379	4,137
12	19,701	24,327	29,996	36,987
13	5,108	6,496	8,264	10,514
14	4,321	5,310	6,518	8,001
15	258	285	406	579
16	0	0	0	0
17	170	207	253	309
18	0	0	0	0
19	0	0	0	0
20	232	288	357	444
Total	35,757	44,439	55,226	68,656

Source: Table 2 & 38

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
BRAINTREE RETAIL PARK

TABLE 40
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	BRAINTREE RETAIL PARK			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	1	1	1	1
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	1	1	1	1
11	6	6	6	6
12	12	12	12	12
13	4	4	4	4
14	6	6	6	6
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	1	1	1	1
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 41
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	BRAINTREE RETAIL PARK			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	608	790	987	1,232
2	158	200	254	323
3	152	193	246	313
4	71	92	120	156
5	0	0	0	0
6	0	0	0	0
7	154	195	249	318
8	0	0	0	0
9	282	366	473	611
10	481	592	729	896
11	3,051	3,739	4,578	5,604
12	18,178	22,446	27,676	34,126
13	2,771	3,524	4,483	5,704
14	5,314	6,531	8,017	9,840
15	201	222	317	452
16	0	0	0	0
17	0	0	0	0
18	485	607	758	946
19	78	98	122	152
20	0	0	0	0
Total	31,984	39,595	49,007	60,674

Source: Table 2 & 40

NORTH ESSEX RETAIL STUDY 2006

TABLE 41A
BRAINTREE RETAIL COMMITMENTS - COMPARISON GOODS

	Net Comparison Flsp (sqm)	Company Average Sales (£ per sq m net)	Average Turnover 2006 (£000s)	Average Turnover 2011 (£000s)
Non-Food Bulky Goods Retail Unit	2,054	2,480	5,094	5,763

Note: Sales Density Average of Existing Floorspace (Table 44)

NORTH ESSEX RETAIL STUDY 2006
FLOORSPACE SCHEDULE - BRAINTREE

TABLE 42

BRAINTREE TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Braintree Town Centre	11,837

Source: Egi

TABLE 43

BRAINTREE FACTORY OUTLET COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Braintree Factory Outlet	12,300

Source: Egi

TABLE 44

BRAINTREE RETAIL WAREHOUSING FLOORSPACE

	Net Floorspace Sq m	Sales Density £ per sq m	Turnover 2004 £000's
Braintree Retail Park			
Carpets4Less	465	1,076	500
Dreams	465	1,423	662
Halfords	1,171	2,029	2,376
Dansk Design Furniture	720	1,500	1,080
Powerhouse	711	2,602	1,850
Comet	1,253	6,133	7,685
Carpetright	767	1,268	973
Bike Hut	485	2,690	1,305
B&Q	3,408	2,051	6,990
TOTAL	**9,445**	**2,480**	**23,420**

TABLE 45

HALSTEAD TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Halstead Town Centre	5,493

Source: Experian Goad

TABLE 46

WITHAM TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Witham Town Centre	7,430

Source: Experian Goad

TABLE 47

FUTURE SHOP FLOORSPACE CAPACITY: BRAINTREE DISTRICT

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2.5	%pa '06-'21	
	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	1,704,586	2,153,249	2,731,952	3,468,861
Market Share from Survey Area	9	9	9	9
Survey Area Residents Spending (£000)	148,233	183,327	226,871	280,844
Inflow to ***Braintree Town Centre*** from Beyond Survey Area (7%) £000	4,687	5,794	7,157	8,842
Inflow to ***Braintree Factory Outlet Village*** from Beyond Survey Area (41%) £000	24,848	30,881	38,377	47,710
TOTAL RETAIL TURNOVER IN BRAINTREE DISTRICT £000	**177,768**	**220,002**	**272,405**	**337,396**
Existing Shop Floorspace (sq m net)	46,505	46,505	46,505	46,505
Sales per sq m net £	3,823	4,325	4,893	5,536
Sales from Existing Floorspace (£000)	177,768	201,129	227,559	257,462
Sales from Committed Floorspace (£000)	0	5,763	6,521	7,378
Residual Spending to Support new shops (£000)	0	13,110	38,326	72,556
Sales per sq m net in new shops (£)	5,000	5,657	6,400	7,241
Capacity for new floorspace (sq m net)	0	2,318	5,988	10,020

NORTH ESSEX RETAIL STUDY 2006

TABLE 48
FUTURE SHOP FLOORSPACE CAPACITY: BRAINTREE URBAN AREA

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2.5	%pa '06-'21	
	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	1,704,586	2,153,249	2,731,952	3,468,861
Market Share from Survey Area	8	8	8	8
Survey Area Residents Spending (£000) (See Note A)	130,015	161,011	199,320	246,799
Inflow to ***Braintree Town Centre*** from Beyond Survey Area (7%) £000	4,687	5,794	7,157	8,842
Inflow to ***Braintree Factory Outlet Village*** from Beyond Survey Area (41%) £000	24,848	30,881	38,377	47,710
TOTAL RETAIL TURNOVER IN BRAINTREE URBAN AREA £000	**159,551**	**197,687**	**244,854**	**303,351**
Existing Shop Floorspace (sq m net)	41,665	41,665	41,665	41,665
Sales per sq m net £	3,829	4,333	4,902	5,546
Sales from Existing Floorspace (£000)	159,551	180,517	204,239	231,077
Sales from Committed Floorspace (£000)	0	5,763	6,521	7,378
Residual Spending to Support new shops (£000)	0	11,406	34,095	64,896
Sales per sq m net in new shops (£)	5,500	6,223	7,040	7,966
Capacity for new floorspace (sq m net)	0	1,833	4,843	8,147

A - Includes Braintree Town Centre / Braintree Factory Outlet Village / Braintree Retail Park

NORTH ESSEX RETAIL STUDY 2006

TABLE 49
FUTURE SHOP FLOORSPACE CAPACITY: HALSTEAD TOWN CENTRE

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2.5	%pa '06-'21	
	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	1,704,586	2,153,249	2,731,952	3,468,861
Market Share from Survey Area	0.5	0.5	0.5	0.5
Survey Area Residents Spending (£000)	7,811	9,576	11,729	14,367
Existing Shop Floorspace (sq m net)	5,493	5,493	5,493	5,493
Sales per sq m net £	1,422	1,609	1,820	2,059
Sales from Existing Floorspace (£000)	7,811	8,837	9,999	11,312
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	739	1,731	3,055
Sales per sq m net in new shops (£)	4,000	4,526	5,120	5,793
Capacity for new floorspace (sq m net)	0	163	338	527

NORTH ESSEX RETAIL STUDY 2006

TABLE 50
FUTURE SHOP FLOORSPACE CAPACITY: WITHAM TOWN CENTRE

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2.5	%pa '06-'21	

	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	1,704,586	2,153,249	2,731,952	3,468,861
Market Share from Survey Area	1	1	1	1
Survey Area Residents Spending (£000)	10,407	12,740	15,822	19,678
Existing Shop Floorspace (sq m net)	7,430	7,430	7,430	7,430
Sales per sq m net £	1,401	1,585	1,793	2,029
Sales from Existing Floorspace (£000)	10,407	11,774	13,322	15,072
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	965	2,501	4,606
Sales per sq m net in new shops (£)	4,000	4,526	5,120	5,793
Capacity for new floorspace (sq m net)	0	213	488	795

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
MALDON TOWN CENTRE

TABLE 51
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	MALDON TOWN CENTRE			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	1	1	1	1
15	1	1	1	1
16	0	0	0	0
17	0	0	0	0
18	26	26	26	26
19	4	4	4	4
20	8	8	8	8

SOURCE: North Essex Telephone Survey, September 2005

TABLE 52
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	MALDON TOWN CENTRE			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	57	69	84	104
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	298	379	482	614
14	821	1,009	1,239	1,521
15	321	355	506	720
16	0	0	0	0
17	0	0	0	0
18	22,814	28,563	35,644	44,482
19	1,197	1,500	1,874	2,341
20	5,360	6,659	8,266	10,262
Total	30,869	38,534	48,096	60,043

Source: Table 2 & 51

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
BURNHAM-ON-CROUCH TOWN CENTRE

TABLE 53
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	BURNHAM-ON-CROUCH TOWN CENTRE			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	2	2	2	2

SOURCE: North Essex Telephone Survey, September 2005

TABLE 54
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	BURNHAM-ON-CROUCH TOWN CENTRE			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	1,106	1,374	1,706	2,118
Total	1,106	1,374	1,706	2,118

Source: Table 2 & 53

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
RETAIL WAREHOUSING - MALDON

TABLE 55
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	RETAIL WAREHOUSING - MALDON			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	3	3	3	3
19	1	1	1	1
20	2	2	2	2

SOURCE: North Essex Telephone Survey, September 2005

TABLE 56
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	RETAIL WAREHOUSING - MALDON			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	126	155	190	234
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	3,039	3,805	4,749	5,926
19	291	365	456	569
20	1,219	1,514	1,880	2,333
Total	4,675	5,839	7,274	9,062

Source: Table 2 & 55

NORTH ESSEX RETAIL STUDY 2006
FLOORSPACE SCHEDULE - MALDON

TABLE 57

MALDON TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Maldon Town Centre	10,082

Source: Experian Goad

TABLE 58

MALDON RETAIL WAREHOUSING FLOORSPACE

	Net Floorspace Sq m	Sales Density £ per sq m	Turnover 2004 £000's
Focus DIY, Wycke Hill Business Park	2,508	948	2,378
TOTAL	**2,508**	948	**2,378**

Source: Trevor Wood Retail Warehouse Database

TABLE 59

BURNHAM-ON-CROUCH TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Burnham-on-Crouch Town Centre	1,170

Source: GVA Grimley Site Visit

TABLE 60

THE BENTALL CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
The Bentall Centre	90

Source: GVA Grimley Site Visit

NORTH ESSEX RETAIL STUDY 2006

TABLE 61

FUTURE SHOP FLOORSPACE CAPACITY: MALDON DISTRICT

GROWTH IN SALES PER SQ M	COMPARISON GOODS 2.5 %pa '06-'21			
	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	1,704,586	2,153,249	2,731,952	3,468,861
Market Share from Survey Area	2	2	2	2
Survey Area Residents Spending (£000)	36,650	45,747	57,076	71,223
Existing Shop Floorspace (sq m net)	13,850	13,850	13,850	13,850
Sales per sq m net £	2,646	2,994	3,387	3,833
Sales from Existing Floorspace (£000)	36,650	41,467	46,916	53,081
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	4,281	10,160	18,142
Sales per sq m net in new shops (£)	5,000	5,657	6,400	7,241
Capacity for new floorspace (sq m net)	0	757	1,587	2,505

NORTH ESSEX RETAIL STUDY 2006

TABLE 62
FUTURE SHOP FLOORSPACE CAPACITY: MALDON URBAN AREA

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2.5	%pa '06-'21	
	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	1,704,586	2,153,249	2,731,952	3,468,861
Market Share from Survey Area	2	2	2	2
Survey Area Residents Spending (£000) (See Note A)	35,544	44,373	55,370	69,105
Existing Shop Floorspace (sq m net)	10,082	10,082	10,082	10,082
Sales per sq m net £	3,526	3,989	4,513	5,106
Sales from Existing Floorspace (£000)	35,544	40,215	45,500	51,479
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	4,158	9,871	17,626
Sales per sq m net in new shops (£)	5,000	5,657	6,400	7,241
Capacity for new floorspace (sq m net)	0	735	1,542	2,434

A - Includes Maldon Town Centre / Retail Warehousing, Maldon

TABLE 63
FUTURE SHOP FLOORSPACE CAPACITY: BURNHAM-ON-CROUCH

GROWTH IN SALES PER SQ M	COMPARISON GOODS 2.5 %pa '06-'21			
	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	1,704,586	2,153,249	2,731,952	3,468,861
Market Share from Survey Area	0	0	0	0
Survey Area Residents Spending (£000)	1,106	1,374	1,706	2,118
Existing Shop Floorspace (sq m net)	1,170	1,170	1,170	1,170
Sales per sq m net £	945	1,070	1,210	1,369
Sales from Existing Floorspace (£000)	1,106	1,252	1,416	1,602
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	123	290	516
Sales per sq m net in new shops (£)	5,500	6,223	7,040	7,966
Capacity for new floorspace (sq m net)	0	20	41	65

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
CLACTON-ON-SEA TOWN CENTRE

TABLE 64
COMPARISON GOODS ALLOCATION - MARKET SHARE %

Catchment Zone	CLACTON-ON-SEA TOWN CENTRE 2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	1	1	1	1
3	0	0	0	0
4	3	3	3	3
5	1	1	1	1
6	13	13	13	13
7	44	44	44	44
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 65
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	CLACTON-ON-SEA TOWN CENTRE 2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	718	908	1,155	1,469
3	0	0	0	0
4	2,354	3,070	3,999	5,209
5	476	622	815	1,068
6	6,693	8,101	9,980	12,294
7	77,446	98,089	125,236	159,896
8	0	0	0	0
9	404	523	676	873
10	0	0	0	0
11	65	80	98	120
12	333	411	507	625
13	211	269	342	435
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
Total	88,699	112,073	142,807	181,989

Source: Table 2 & 64

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
FRINTON TOWN CENTRE

TABLE 66
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	FRINTON TOWN CENTRE			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	1	1	1	1
5	1	1	1	1
6	28	28	28	28
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 67
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	FRINTON TOWN CENTRE			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	577	752	980	1,276
5	349	457	599	784
6	13,900	16,824	20,725	25,531
7	631	799	1,020	1,302
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
Total	15,456	18,832	23,324	28,894

Source: Table 2 & 66

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
WALTON-ON-THE-NAZE TOWN CENTRE

TABLE 68
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	WALTON-ON-THE-NAZE TOWN CENTRE			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	1	1	1	1
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 69
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	WALTON-ON-THE-NAZE TOWN CENTRE			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	285	370	462	578
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	617	746	920	1,133
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	277	353	449	571
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
Total	1,179	1,469	1,831	2,281

Source: Table 2 & 68

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
HARWICH TOWN CENTRE

TABLE 70
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	HARWICH TOWN CENTRE			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	12	12	12	12
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 71
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	HARWICH TOWN CENTRE			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	159	207	269	351
5	8,594	11,242	14,729	19,298
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
Total	8,752	11,449	14,999	19,649

Source: Table 2 & 70

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
DOVERCOURT TOWN CENTRE

TABLE 72
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	DOVERCOURT TOWN CENTRE			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	1	1	1	1
5	17	17	17	17
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 73
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	DOVERCOURT TOWN CENTRE			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	1,307	1,704	2,220	2,892
5	11,620	15,201	19,916	26,093
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
Total	12,927	16,905	22,136	28,985

Source: Table 2 & 72

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
BRIGHTLINGSEA TOWN CENTRE

TABLE 74
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	BRIGHTLINGSEA TOWN CENTRE			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	3	3	3	3
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 75
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	BRIGHTLINGSEA TOWN CENTRE			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	2,309	3,012	3,924	5,111
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
Total	2,309	3,012	3,924	5,111

Source: Table 2 & 74

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
MANNINGTREE TOWN CENTRE

TABLE 76
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	MANNINGTREE TOWN CENTRE			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 77
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	MANNINGTREE TOWN CENTRE			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	229	299	389	507
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
Total	229	299	389	507

Source: Table 2 & 76

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
CLACTON FACTORY OUTLET

TABLE 78
COMPARISON GOODS ALLOCATION - MARKET SHARE %

Catchment Zone	CLACTON FACTORY OUTLET 2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	1	1	1	1
5	0	0	0	0
6	3	3	3	3
7	3	3	3	3
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 79
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	CLACTON FACTORY OUTLET 2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	499	650	847	1,103
5	0	0	0	0
6	1,364	1,651	2,034	2,505
7	5,014	6,351	8,108	10,352
8	0	0	0	0
9	294	381	492	636
10	171	211	259	319
11	0	0	0	0
12	717	886	1,092	1,347
13	93	118	150	191
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
Total	8,152	10,248	12,983	16,454

Source: Table 2 & 78

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
RETAIL WAREHOUSING

TABLE 80
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	CLACTON RETAIL WAREHOUSING							
	BROOK RETAIL PARK				WATERGLADE RETAIL PARK			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	1	1	1	1	1	1	1	1
5	1	1	1	1	0	0	0	0
6	5	5	5	5	3	3	3	3
7	6	6	6	6	7	7	7	7
8	1	1	1	1	1	1	1	1
9	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 81
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	CLACTON RETAIL WAREHOUSING							
	BROOK RETAIL PARK				WATERGLADE RETAIL PARK			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0	126	163	204	255
2	0	0	0	0	0	0	0	0
3	0	0	0	0	179	228	290	370
4	894	1,166	1,519	1,979	763	995	1,296	1,688
5	449	587	770	1,008	214	280	367	481
6	2,480	3,002	3,698	4,556	1,344	1,627	2,004	2,469
7	10,076	12,762	16,294	20,803	12,949	16,400	20,939	26,734
8	158	201	256	328	160	204	261	333
9	0	0	0	0	0	0	0	0
10	0	0	0	0	168	206	254	312
11	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0
18	0	0	0	0	97	122	152	189
19	0	0	0	0	132	166	207	259
20	70	87	108	134	0	0	0	0
Total	14,127	17,806	22,646	28,809	16,132	20,391	25,974	33,090

Source: Table 2 & 80

NORTH ESSEX RETAIL STUDY 2006

COMPARISON GOODS
HARWICH RETAIL WAREHOUSING

TABLE 82
COMPARISON GOODS ALLOCATION - MARKET SHARE %

Catchment Zone	HARWICH GATEWAY RETAIL PARK 2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	1	1	1	1
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 83
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	HARWICH GATEWAY RETAIL PARK 2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	159	207	269	351
5	508	664	870	1,140
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
Total	666	871	1,139	1,491

Source: Table 2 & 82

NORTH ESSEX RETAIL STUDY 2006
FLOORSPACE SCHEDULE - TENDRING

TABLE 84
CLACTON-ON-SEA TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Clacton-on-Sea Town Centre	14,072

TABLE 85
CLACTON FACTORY OUTLET COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Clacton Factory Outlet	7,066

TABLE 86
CLACTON RETAIL WAREHOUSING FLOORSPACE

	Net Floorspace Sq m	Sales Density £ per sq m	Turnover 2004 £000's
Brook Retail Park			
B&Q Mini Warehouse	1,394	2,051	2,859
Currys	4,812	4,599	22,130
SUB-TOTAL	**6,206**	**4,027**	**24,989**
Waterglade Retail Park			
Comet	966	6,133	5,924
Halfords	838	2,029	1,700
Homebase	3,832	1,411	5,407
Carpetright	1,246	1,268	1,580
Rosebys	180	1,300	234
SUB-TOTAL	**7,062**	**2,102**	**14,846**
TOTAL	**13,268**	**1,901**	**25,223**

TABLE 87
FRINTON-ON-SEA TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Frinton-on-Sea	6,825

TABLE 88
WALTON-ON-THE-NAZE TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Walton-on-the-Naze Town Centre	1,170

TABLE 89
HARWICH TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Harwich Town Centre	845

TABLE 90
HARWICH RETAIL WAREHOUSING FLOORSPACE

	Net Floorspace Sq m	Sales Density £ per sq m	Turnover 2004 £000's
Harwich Gateway Retail Park			
Focus	2,323	948	2,202
Argos	836	6,663	5,570
Carpetright	650	1,268	824
Peacocks	511	2,000	1,022
Choices Video	325		
Brantano	465	5,125	2,383
TOTAL	**5,110**	**2,349**	**12,002**

TABLE 91
DOVERCOURT TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Dovercourt Town Centre	5,376

TABLE 92
MANNINGTREE TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Manningtree Town Centre	720

TABLE 93
BRIGHTLINGSEA TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Brightlingsea Town Centre	900

TABLE 94

FUTURE SHOP FLOORSPACE CAPACITY: TENDRING DISTRICT

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2.5	%pa '06-'21	
	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	1,704,586	2,153,249	2,731,952	3,468,861
Market Share from Survey Area	8	8	8	8
Survey Area Residents Spending (£000)	137,704	174,287	222,392	283,871
Inflow to ***Clacton-on-Sea Town Centre*** from Beyond Survey Area (20%) £000	22,175	28,018	35,702	45,497
Inflow to ***Clacton Factory Outlet Village*** from Beyond Survey Area (52%) £000	8,831	11,102	14,065	17,825
TOTAL RETAIL TURNOVER IN TENDRING DISTRICT £000	**168,710**	**213,406**	**272,159**	**347,193**
Existing Shop Floorspace (sq m net)	55,352	55,352	55,352	55,352
Sales per sq m net £	3,048	3,448	3,902	4,414
Sales from Existing Floorspace (£000)	168,710	190,880	215,964	244,343
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	22,526	56,195	102,850
Sales per sq m net in new shops (£)	5,000	5,657	6,400	7,241
Capacity for new floorspace (sq m net)	0	3,982	8,780	14,203

TABLE 95
FUTURE SHOP FLOORSPACE CAPACITY: CLACTON-ON-SEA URBAN AREA

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2.5	%pa '06-'21	
	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	1,704,586	2,153,249	2,731,952	3,468,861
Market Share from Survey Area	7	7	7	7
Survey Area Residents Spending (£000) (See Note A)	127,111	160,517	204,410	260,341
Inflow to ***Clacton-on-Sea Town Centre*** from Beyond Survey Area (7%) £000	22,175	28,018	35,702	45,497
Inflow to ***Clacton Factory Outlet Village*** from Beyond Survey Area (41%) £000	8,831	11,102	14,065	17,825
TOTAL RETAIL TURNOVER IN CLACTON URBAN AREA £000	158,117	199,637	254,176	323,664
Existing Shop Floorspace (sq m net)	34,406	34,406	34,406	34,406
Sales per sq m net £	4,596	5,200	5,883	6,656
Sales from Existing Floorspace (£000)	158,117	178,895	202,403	229,001
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	20,742	51,773	94,663
Sales per sq m net in new shops (£)	5,000	5,657	6,400	7,241
Capacity for new floorspace (sq m net)	0	3,667	8,089	13,072

A - Includes Clacton-on-Sea town centre / Clacton Factory Outlet Centre / Brook Retail Park / Waterglade Retail Park

NORTH ESSEX RETAIL STUDY 2006

TABLE 96
FUTURE SHOP FLOORSPACE CAPACITY: FRINTON-ON-SEA TOWN CENTRE

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2.5	%pa '06-'21	
	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	1,704,586	2,153,249	2,731,952	3,468,861
Market Share from Survey Area	1	1	1	1
Survey Area Residents Spending (£000)	15,456	18,832	23,324	28,894
Existing Shop Floorspace (sq m net)	6,825	6,825	6,825	6,825
Sales per sq m net £	2,265	2,562	2,899	3,280
Sales from Existing Floorspace (£000)	15,456	17,487	19,785	22,385
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	1,344	3,538	6,509
Sales per sq m net in new shops (£)	3,000	3,394	3,840	4,345
Capacity for new floorspace (sq m net)	0	396	921	1,498

NORTH ESSEX RETAIL STUDY 2006

TABLE 97
FUTURE SHOP FLOORSPACE CAPACITY: WALTON-ON-THE-NAZE TOWN CENTRE

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2.5	%pa '06-'21	
	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	1,704,586	2,153,249	2,731,952	3,468,861
Market Share from Survey Area	0.1	0.1	0.1	0.1
Survey Area Residents Spending (£000)	1,179	1,469	1,831	2,281
Existing Shop Floorspace (sq m net)	1,170	1,170	1,170	1,170
Sales per sq m net £	1,008	1,140	1,290	1,460
Sales from Existing Floorspace (£000)	1,179	1,334	1,509	1,708
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	135	321	573
Sales per sq m net in new shops (£)	3,000	3,394	3,840	4,345
Capacity for new floorspace (sq m net)	0	40	84	132

NORTH ESSEX RETAIL STUDY 2006

TABLE 98
FUTURE SHOP FLOORSPACE CAPACITY: HARWICH URBAN AREA

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2.5	%pa '06-'21	
	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	1,704,586	2,153,249	2,731,952	3,468,861
Market Share from Survey Area	1	1	1	1
Survey Area Residents Spending (£000) (See Note A)	9,418	12,320	16,138	21,140
Existing Shop Floorspace (sq m net)	5,955	5,955	5,955	5,955
Sales per sq m net £	1,582	1,789	2,025	2,291
Sales from Existing Floorspace (£000)	9,418	10,656	12,056	13,641
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	1,664	4,082	7,499
Sales per sq m net in new shops (£)	3,000	3,394	3,840	4,345
Capacity for new floorspace (sq m net)	0	490	1,063	1,726

A - Includes Harwich town centre / Harwich Gateway Retail Park

NORTH ESSEX RETAIL STUDY 2006

TABLE 99
FUTURE SHOP FLOORSPACE CAPACITY: DOVERCOURT TOWN CENTRE

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2.5	%pa '06-'21	
	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	1,704,586	2,153,249	2,731,952	3,468,861
Market Share from Survey Area	1	1	1	1
Survey Area Residents Spending (£000)	12,927	16,905	22,136	28,985
Existing Shop Floorspace (sq m net)	5,376	5,376	5,376	5,376
Sales per sq m net £	2,405	2,720	3,078	3,482
Sales from Existing Floorspace (£000)	12,927	14,625	16,547	18,722
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	2,280	5,589	10,264
Sales per sq m net in new shops (£)	3,000	3,394	3,840	4,345
Capacity for new floorspace (sq m net)	0	672	1,455	2,362

NORTH ESSEX RETAIL STUDY 2006

TABLE 100
FUTURE SHOP FLOORSPACE CAPACITY: MANNINGTREE TOWN CENTRE

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2.5	%pa '06-'21	
	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	1,704,586	2,153,249	2,731,952	3,468,861
Market Share from Survey Area	0	0	0	0
Survey Area Residents Spending (£000)	229	299	389	507
Existing Shop Floorspace (sq m net)	720	720	720	720
Sales per sq m net £	318	360	407	461
Sales from Existing Floorspace (£000)	229	259	293	332
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	40	96	175
Sales per sq m net in new shops (£)	3,000	3,394	3,840	4,345
Capacity for new floorspace (sq m net)	0	12	25	40

NORTH ESSEX RETAIL STUDY 2006

TABLE 101
FUTURE SHOP FLOORSPACE CAPACITY: BRIGHTLINGSEA TOWN CENTRE

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2.5	%pa '06-'21	
	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	1,704,586	2,153,249	2,731,952	3,468,861
Market Share from Survey Area	0	0	0	0
Survey Area Residents Spending (£000)	2,309	3,012	3,924	5,111
Existing Shop Floorspace (sq m net)	900	900	900	900
Sales per sq m net £	2,566	2,903	3,285	3,716
Sales from Existing Floorspace (£000)	2,309	2,613	2,956	3,345
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	399	967	1,766
Sales per sq m net in new shops (£)	3,000	3,394	3,840	4,345
Capacity for new floorspace (sq m net)	0	118	252	406

NORTH ESSEX RETAIL STUDY 2006

TABLE 102
COMPARISON GOODS
FUTURE SHOP FLOORSPACE CAPACITY: GLOBAL CAPACITY - NORTH ESSEX

GROWTH IN SALES PER SQ M	COMPARISON GOODS 2.5 %pa '06-'21			
	COMPARISON GOODS			
	2006	2011	2016	2021
Total Available Expenditure (£000)	1,704,586	2,153,249	2,731,952	3,468,861
Market Share from Survey Area	54	54	54	54
Survey Area Residents Spending (£000)	913,018	1,152,647	1,469,955	1,876,409
Spending Inflow (£000)	**131,821**	**166,335**	**211,701**	**269,655**
TOTAL RETAIL SPENDING IN NORTH ESSEX SURVEY AREA (£000)	**1,044,840**	**1,318,982**	**1,681,656**	**2,146,065**
Existing Shop Floorspace (sq m net)	228,015	228,015	228,015	228,015
Sales per sq m net £	4,582	5,184	5,866	6,637
Sales from Existing Floorspace (£000)	1,044,840	1,182,140	1,337,483	1,513,240
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	136,842	344,173	632,825
Sales per sq m net in new shops (£)	5,000	5,657	6,400	7,241
Capacity for new floorspace (sq m net)	0	24,190	53,773	87,389