Brentwood Retail Study Update
Addendum

Brentwood Borough Council

Tuesday, September 1, 2020

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Appendices

1.0 Introduction

1.1 Lichfields was commissioned by the Brentwood Borough Council (BBC) to prepare the Borough wide Retail and Commercial Leisure Study in 2014 (2014 RCLS). This report provides a partial update of the 2014 RCLS, relating to retail and food/beverage uses. This report provides an addendum to the 2014 RCLS and should be read alongside the previous report.

1.2 This addendum updates the retail and food/beverage floorspace capacity projections by adopting Experian's latest (post Brexit) forecasts for consumer expenditure, home shopping/special forms of trading (SFT) and sales density growth rates, as published in February 2020 (Retail Planner Briefing Note 17).

1.3 The updated floorspace capacity projections are summarised in in Section 2 of this report, and the revised capacity model tables are shown in Appendix 2, 3 and 4.

1.4 Section 3 of this addendum also includes a review of emerging Local Plan policies and supporting text in terms of their conformity with the new NPPF, proposed changes to the Use Classes Order (UCO) and the recommendations set out in this Update. The following policies include elements relevant to retail and town centres:

- Policy PC07 (Retail and Commercial Leisure Growth);
- Policy PC08 (Retail Hierarchy and Designated Centres);
- Policy PC09 (Brentwood Town Centre);
- Policy PC10 (Mixed Use Development in Designated Centres);
- Policy PC11 (Primary Shopping Areas);
- Policy PC12 (Non-Centre Uses); and
- Policy PC13 (Night Time Economy).

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2.0 Updated floorspace capacity assessment

Introduction

2.1 This section updates the quantitative scope for new retail floorspace in the Borough during the Local Plan from 2016 to 2034. The updated projections adopt Experian's latest forecasts for expenditure, special forms of trading (SFT) and sales density growth rates. A further consideration is the potential implications of the Covid-19 crisis.

Implications of Covid-19

2.2 The main implications of the Covid-19 crisis for the evidence base are likely to be as follows:

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

2.3 The key uncertainties relating to the first two points are primarily the length of crisis/potential further lockdowns and likely recovery period. The longer term structural implications are harder to predict and quantify.

2.4 In the short term, operators are likely to face elevated risk to cash flow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services have been hardest hit. Short terms supply chain disruption could lead to inflationary pressure, which may have an impact of consumer demand. Retailers with infrastructure to fulfil on-line orders/home delivery are benefiting at least in the short term. There may be a longer terms structural shift to multi-channel shopping, reducing the demand for physical space within town centres. Bearing these trends in mind, following the Covid-19 crisis there is likely to be a spike in town centre vacancies with unfortunately some businesses failing to re-open. Many operators have already announced job losses and store closures.

2.5 The Covid-19 could have some short-term impact in terms of population migration levels and a pause in construction activity. Given that the focus of the study is to assess the long-term need over the plan period within five year interval projections (2023 to 2028 and 2028 to 2033), the development plan should assume population projections will return to projected levels by 2023. The first interval population projections should not be significantly affected.

2.6 Experian's latest local expenditure data was published in February 2020 and does not reflect the Covid-19 crisis and resulting economic downturn. Experian's growth projections for 2020 and 2021 now appear optimistic for comparison goods retail and food/beverage expenditure. Although the convenience good retail (food stores) and home shopping sectors appear to have benefitted.

2.7 Experian's expenditure pe capita growth projections for comparison goods retail and food/beverage expenditure up to 2023 are likely to be maximum estimates. However, in the longer term to 2028 and 2033, Experian recommends relatively modest levels of growth when compared with historic trends. These longer term forecasts should not be significantly over-estimated.

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

Study Area

2.9 As in the 2014 RCLS, the quantitative capacity analysis is based on the defined study area zones that cover the catchment areas of the main shopping destinations in the Borough. The study area is sub-divided into five zones as shown in Appendix 1.

Population projections

2.1 The 2014 adopted 2011 population data from the 2011 Census projected forward to 2030. These projections were based on the Edge Analytics Greater Essex Demographic Forecasts. Two growth scenarios were adopted in the 2014 RCLS i.e. a baseline scenario assuming 362 dwellings per annum and a higher growth scenario assuming 413 dwellings per annum. This population information is now out of date and needs to be updated.

2.2 Experian's MMG3 population projections have been adopted as shown in Table 1 (Appendix 2). These projections are based on the 2016 Sub-National Population Projections (SNPP 2016).

2.3 Population within the study area is projected to increase by 13.9% bwetween 2016 to 2033, increasing from 75,369 in 2016 to 85,869 in 2033. The average annual growth rate is 0.77% per annum. By way of comparsion, the average annual rate of growth (baseline) adopted in the 2014 RCLS for the periond 2015 to 2030 was 0.87% per annum.

2.4 Population growth in the Borough between 2020 to 2033 (+7,132 people) has been distributed between the five study area zones based on the Local Plan housing allocation trajectory. For example, housing allocations at West Horndon and Dunton Hills are expected to account for 49% of the Borough's new dwelling completions by 2028 increasing to 54% by 2033. Population growth has been distributed in line with the proportion of new dwellings expected in be built in each zone. This approach is considered more accurate than the 2014 RCLS, which assumed an even distribution of growth based on existing population within each zone rather than the location of housing allocations.

Expenditure forecasts

2.5 All monetary values expressed in this update report are at 2018 prices, consistent with Experian's latest expenditure information. The 2014 RCLS adopted a 2012 price base and therefore the figures are not directly comparable.

2.6 Experian's latest EBS national expenditure information (Experian Retail Planner Briefing Note 17 – February 2020) has been used to forecast expenditure within the Borough. Actual (rather than projected) change in average expenditure per capita between 2016 and 2018 was as follows:

- convenience goods: +2.9%;
- comparison goods: +9.0%;
- leisure: -1.1%.

2.7 Experian's short term EBS growth forecast rates for 2018 to 2021 reflect recent post-Brexit economic circumstances, but do not take account of the current Covid-19 crisis. The forecast changes are as follows:

- convenience goods: -0.4% for 2019, 0% for 2020 and 0.5% for 2021;
- comparison goods: 3.9% for 2019, 3.0% for 2020 and 3.2% for 2021;
- leisure: -0.5% for 2019, 0.9% for 2020 and 1.0% for 2021.

2.8 These short term forecasts, particularly for comparison goods and leisure, are relatively cautious but may still be optimistic in the light of the coronavirus crisis.

2.9 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's medium term growth average forecasts have been adopted (2022 to 2026), as follows:

- convenience goods: 0.1% per annum for 2022 and beyond;
- comparison goods: 3.2% per annum growth for 2022 to 2026, and 3.0% per annum after 2026; and
- leisure: 1.2% per annum growth for 2022 to 2026, and 1.1% per annum after 2026.

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

2.11 Experian’s latest adjusted deductions for SFT in 2016 are:

- 3.0% of convenience goods expenditure; and
- 13.9% of comparison goods expenditure.

2.12 The projections provided by Experian suggest that these percentages will have increased to 4.5% and 18.4% by 2020 respectively. The long term projections suggest an increase to 6.6% and 25.0% by 2033 respectively.

2.13 Table 2 in Appendix 2 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2033. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 3 and food/beverage expenditure is shown in Table 2 in Appendix 4.

2.14 As a consequence of growth in population and per capita spending, total convenience goods spending within the study area is forecast to increase by +14.3% from £172.65 million in 2016 to £197.34 million in 2033, as shown in Table 3 (Appendix 2).

2.15 Comparison goods spending is forecast to increase by +72.1% between 2016 and 2033, increasing from £269.58 million in 2016 to £463.95 million in 2033, as shown in Table 3 (Appendix 3).

2.16 Food and beverage spending is forecast to increase by +33.9% between 2016 and 2033, increasing from £123.16 million in 2016 to £164.88 million in 2033, as shown in Table 3 (Appendix 4).

Growth in turnover densities

2.17 Experian's Retail Planner Briefing Note 17, February 2020 indicates comparison goods retail sales floorspace is expected to increase its average sales density by 3.6% per annum during 2020 and 2021; 3.2% per annum during 2022 to 2026 and 2.7% per annum beyond 2026. These increases have been adopted and will absorb much of the future expenditure growth.

2.18 For convenience goods retail, Experian indicates sales floorspace is expected to increase its average sales density by 0.3% during 2020, 0.5% during 2021 and 0% growth beyond 2021.

2.19 Experian does not provide projections for food and beverage sales densities. An average growth rate of 1% per annum has been adopted, consistent with the 2014 RCLS.

Base year market shares

2.20 Expenditure patterns in the 2016 base year adopt market shares within each study area zones taken from the 2015 RCLS. These market shares were calculated from the results of a household shopper survey in 2014. These market shares are assumed to have remained constant up to 2020, because there have been no significant changes in retail and food/beverage provision since the 2014 RCLS, although the amount of SFT expenditure deducted has increased based on Experian's latest data.

2.21 The future projections at 2023, 2028 and 2033 take account of proposed developments at West Horndon and Dunton Hills, which will provide new district, village and local centres. These developments will alter market shares within Zone 5 in the south of the Borough. Future markets shares, including estimates for the proposed residential developments at West Horndon and Dunton Hills are shown in Table 8 in Appendix 2 and Tables 7 in Appendix 3 and 4.

2.22 Shops and services within Zone 5 currently retain a very low proportion of retail and food/ beverage expenditure. New district, village and local centres are expected to meet the day to day needs of residents within the local catchment area, which will minimise the need to travel for items and services purchased on a regular basis. The development of new centres at West Horndon and Dunton Hills provides an opportunity to increase expenditure retention within Zone 5 by improving the range and choice of facilities available. Future floorspace capacity has been assessed based on expected expenditure retention from both new West Horndon/Dunton Hills residents and the indigenous population within Zone 5.

Capacity for convenience goods retail floorspace

2.23 Available convenience goods expenditure attracted to Brentwood Borough has been projected from the 2016 base year forward to 2020, 2023, 2028 and 2033, and is summarised in Table 11 in Appendix 2. Convenience goods expenditure available to facilities within the Borough is expected to increase from £135.44 million in 2016 to £159.67 million in 2033.

2.24 The benchmark turnover of existing food stores and floorspace has been updated as shown in Table 7 (Appendix 2). This table adopts the latest ORC food store sales floorspace data and GlobalData's latest company average sales densities.

2.25 Growth rate in turnover efficiency has been adopted to project the expected turnover of existing facilities from 2020, as recommended by Experian (Retail Planner Briefing Note 17 – February 2020).

2.26 Table 12 in Appendix 2 subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for new development. Within the Borough, there was a convenience goods expenditure surplus of +£30.29 million in 2016. This surplus is projected to have increased to +£37.25 million at 2020. By way of comparsion, the 2014 RCLS predicted a similar expenditure surplus of between +£30.48 million to +£32.06 million at 2020 (adjusted from 2012 to 2018 prices).

2.27 Continued population and expenditure growth creates a higher surplus of +£49.12 million at 2028 increasing to +£53.68 million by 2033. The 2030 projections in the 2014 RCLS were marginally higher at +£54.3 million to +£57.96 million (price adjusted).

2.28 The surplus expenditure projections have been converted into potential new floorspace estimates Table 13 in Appendix 2 based on an average sales density of £12,000 per sq.m net, which is an approximate average for the main food store operators. The results are summarised in Table 2.1 below.

Table 2.1 Convenience goods floorspace capacity (sq.m gross) - cumulative

Area	2023	2028	2033
Brentwood	3,410	3,573	3,754
Shenfield	137	149	163
Ingatestone	-213	-209	-201
Hutton	379	393	409
Ingrave/Herongate/W. Horndon/Dunton Hills	1,489	1,857	2,171
Other Brentwood Borough	37	38	44
Total	**5,239**	**5,801**	**6,339**

Source: Table 13, Appendix 2

2.29 Surplus expenditure up to 2033 indicates that there is capacity for additional convenience goods floorspace in the Borough of 6,339 sq.m gross. The 2014 RCLS suggested a slightly lower floorspace projection of between 5,475 to 5,844 sq.m gross but for the earlier 2030 end date. The convenience goods floorspace capacity projections are broadly similar.

Capacity for comparison goods floorspace

2.30 Available comparison goods expenditure has been projected to 2020, 2023, 2028 and 2033 as summarised in Table 12 in Appendix 3. Comparison goods expenditure available to facilities within the Borough is expected to increase from £92.39 million in 2016 to £172.16 million in 2033.

2.31 Table 12 in Appendix 3 subtracts the turnover of existing floorspace (including an allowance for growth in turnover densities) from available expenditure to calculate the amount of surplus expenditure available for new development. At 2020 there is a small expenditure surplus of +£4.18 million. By way of comparsion, the 2014 RCLS predicted a higher expenditure surplus of between +£6.99 million to +£7.87 million at 2020 (adjusted from 2012 to 2018 prices).

2.32 Continued population and expenditure growth creates a higher surplus of +£6.96 million at 2028 increasing to +£13.12 million by 2033. The 2030 projections in the 2014 RCLS were much higher at +£34.59 million to +£37.74 million (price adjusted). The main reason for this difference is Experian's higher recommended growth in sales densities i.e. an average of +3% per annum from 2020 compared with +2% per annum adopted in the 2014 RCLS. Experian's latest recommendations suggest existing comparison goods floorspace will absorb more expenditure growth than previously predicted.

2.33 Surplus comparison expenditure has been converted into comparison goods floorspace projections in Table 12 in Appendix 3, as summarised in Table 2.2 below.

2.34 Surplus expenditure up to 2033 indicates that there is capacity for additional comparison goods floorspace in the Borough of 2,139 sq.m gross. The 2014 RCLS suggested a much higher floorspace projection of between 6,458 to 7,048 sq.m gross, despite the earlier 2030 end date.

Table 2.2 Comparison goods floorspace capacity (sq.m gross) - Cumulative

Area	2023	2028	2033
Brentwood	590	381	989
Shenfield	7	-7	0
Ingatestone	14	3	6
Ingrave/Herongate/W. Horndon/Dunton Hills	669	923	1,141
Other Brentwood Borough	7	-4	2
Total	**1,287**	**1,296**	**2,139**

Source: Table 12, Appendix 3

Capacity for food/beverage floorspace

2.35 Available food and beverage expenditure has been projected forward to 2020, 2023, 2028 and 2033, and is summarised in Table 11 in Appendix 4. The amount of expenditure attracted to the Borough is expected to increase from £88.98 million in 2016 to £118.92 million in 2033.

2.36 Table 12 in Appendix 3 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure available for new development. At 2020 there is a small expenditure surplus of +£1.55 million.

2.37 Continued population and expenditure growth creates a higher surplus of +£9.58 million at 2028 increasing to +£13.54 million by 2033. The 2030 projection in the 2014 RCLS was marginally higher at +£18.34 million. The main reason for this difference is Experian's lower expenditure growth rates. Surplus expenditure growth projections are shown in Table 12 in Appendix 4 and summarised in Table 2.3 below.

Table 2.3 Food and beverage floorspace capacity (sq.m gross) - Cumulative

Area	2023	2028	2033
Brentwood	251	659	967
Shenfield	62	112	147
Ingatestone	56	77	96
Ingrave/Herongate/W. Horndon/Dunton Hills	501	742	938
Other Brentwood Borough	73	109	139
Total	**943**	**1,700**	**2,286**

Source: Table 12, Appendix 4

2.38 Surplus expenditure up to 2033 indicates that there is capacity for additional food/beverage floorspace in the Borough of 2,286 sq.m gross. The 2014 RCLS suggested a marginally higher floorspace projection of 2,954 sq.m gross despite the earlier 2030 end date.

Other non-retail services

2.39 In addition to comparison and convenience good retail and food/beverage floorspace the 2014 RCLS made additional provision for other non-retail services, for example hair salons, banks and financial services. These uses were expected to account for 10% of new floorspace.

2.40 The combined comparison and convenience good retail and food/beverage floorspace projection is 10,764 sqm gross across the Borough. If other non-retail services account for 10% of new floorspace then a further 1,196 sqm gross would be required by 2033. The total floorspace projection for all retail and service uses is 11,960 sqm gross by 2033.

3.0 Policy Review

3.1 This section reviews the emerging Local Plan policies in relation to the revised floorspace capacity projections, the new NPPF and proposed changes to the Use Classes Order.

Policy PC07 (Retail and Commercial Leisure Growth)

3.2 Policy PC07 relates to the need for retail and commercial leisure uses. Retail floorspace capacity figures are included in this policy, which relate to the 2030 projections within the 2014 RCLS. The wording of the policy should be amended to reflect the updated floorspace capacity projections in this report rolled forward to 2033. The policy wording could be amended as follows:

"Provision is made for 1,604 square metres (net) of comparison retail floorspace and 4,438 square metres (net) of convenience floorspace to be provided in the borough over the plan period."

3.3 The supporting text at paragraphs 7.50 to 7.52 should also be amended as follows:

"7.50 – ~~Short to~~ Medium term capacity figures up to 2028 suggest a surplus of available convenience goods expenditure could support an additional 4,061 sqm net (5,801 sqm gross), primarily concentrated in Brentwood Town Centre and in new centres proposed at West Horndon and Dunton Hills. In the long term, surplus expenditure at 2033 could support 4,438 sqm net (6,339 sqm gross) in the borough as a whole.

7.51 – For comparison goods, the surplus expenditure could support an additional 972 sqm net (1,296 sqm gross) by 2028 across the borough. The surplus expenditure at 2033 could support 1,604 sqm net (2,139 sqm gross). The vast majority of this surplus is for Brentwood Town Centre and new centres proposed at West Horndon and Dunton Hills, with very limited amount identified for the rest of the borough.

7.52 – There is also requirement for 2,286 sqm gross of food and drink (pubs, bars, restaurants and takeaway) floorspace and 1,196 sqm gross of other non-retail services up to 2033 primarily concentrated in Brentwood Town Centre and in new centres proposed at West Horndon and Dunton Hills.

Policy PC08 (Retail Hierarchy and Designated Centres)

3.4 This policy identifies the hierarchy of designated centres where retail, leisure, office and other main town centre uses will be directed, as required by the NPPF. Three tiers have been identified i.e. town, district and local centres. The NPPF and NPPG provide limited guidance on the appropriate designation of centres, although local centres are expected to exclude "small parades of purely neighbourhood significance".

3.5 Section 2 of the 2014 RCLS provided an overview of the hierarchy of centres within and surrounding the Borough including an analysis of Javelin's 2013 UK centre rank based on the Venuescore points scoring system. More update to date Javelin information is now available for 2017. The latest information is compared with the previous information in Table 3.1 overleaf.

3.6 Many of the centre's national rank changed between during 2013 to 2016 but the order of centres within the sub-region (i.e. South Essex and East London) is broadly unchanged. The changes are due to completed developments in some centres and the closure or opening of new stores.

Table 3.1 Javelin's Venuescore UK Shopping Index 2013 to 2016

Centre	2016 Venuescore	UK Rank 2016	UK Rank 2013	Change in Rank 2013-2016
London – West End	1,625	1	1	-
Westfield Stratford	325	26	30	+4
Chelmsford	260	43	72	+29
Romford	258	45	45	-
Intu Lakeside	250	48	49	+1
Southend on Sea	196	84	81	-3
Basildon	181	100	87	-13
Ilford	172	115	90	-25
Harlow	122	199	168	-31
Brentwood	**113**	**217**	**209**	**-8**
Lakeside Retail Park	61	482	510	+28
Grays	58	508	481	-27
Loughton	55	551	522	-29
Billericay	49	620	612	-8
Epping	48	633	636	+3
Mayflower Retail Park, Basildon	42	733	833	+100
Junction Thurrock Shopping Park, Grays	42	733	735	+2
Hornchurch	40	781	681	-100
Rayleigh	39	799	752	-47
Pipps Hill Retail Park, Basildon	37	847	1,001	+154
Chelmer Village	36	879	805	-74
Canvey Island	36	879	1,001	+22
Wickford	35	879	901	+22
Pitsea	34	937	1,024	+87
Gallows Corner Retail Park, Romford	34	937	1,001	+64
Upminster	33	968	573	-395
Hadleigh	23	1,368	1,383	+15
Rainham	16	1,888	2,428	+540
South Woodham Ferrers	16	1,888	1,907	+19
Harold Hill	15	2,021	1,684	-337
Shenfield	**12**	**2,566**	**2,428**	**-138**
Ongar	11	2,815	2,428	-387
Elm Park	11	2,815	2,428	-387

3.7 Brentwood town centre remains at the top of the hierarchy in the Borough. Brentwood's Venuescore and national rank is much lower than larger regional and sub-regional centres e.g. Chelmsford, Romford and Southend on Sea. Brentwood's designation as Town Centre is consistent with the centre's relative position in the sub-regional hierarchy.

3.8 Shenfield is the only other centre in the Borough with a Venuescore and national rank assigned by Javelin, due to its small selection of national multiple retail operators.

3.9 Shenfield, Warley Hill and Ingatestone are designated as District Centres, serving more localised retail and service needs than Brentwood Town Centre. These centres have around 20 to 30 shops and services, which is much larger than local centres but not large enough to warrant a Town Centre designation. The 2014 RCLS indicated (paragraph 2.7) that these three centres “effectively functions as district centres”. This position has not changed since 2014 and their designation as District Centres below Brentwood Town Centre remains sound. A new district centre is expected to be provided at Dunton Hills to serve the proposed Garden Village.

3.10 Village centres at West Horndon and Blackmore and 16 other destinations are included as Local Centres, which have a small range of shops and services of a localised nature.

3.11 The proposed approach to the retail hierarchy of centres in the Borough is consistent with the description of centres set out in the NPPF Annex 2 Glossary.

3.12 Primary shopping areas (PSA) have been designated within Brentwood Town Centre, Shenfield and Ingatestone. The boundary of designated centres and PSA are shown on the Proposals Map. One purpose of the PSA relates to the application of the sequential approach, with retail development focused in the PSA but more flexibility for other main town centre uses in the wider centre boundary. The importance of this distinction between retail and other town centre uses is unclear following the proposed changes to the UCO i.e. with retail and other main town centres uses now included in the same Use Class E. There is an apparent inconsistency between the proposed UCO and the NPPF. The PSA is also relevant in relation to Policy PC11 (see below).

3.13 The impact threshold in Policy PC08 (criterion F) is consistent with the NPPF threshold. However, this threshold and impact assessment should normally apply to both retail and leisure uses. would normally. Criterion F could be amended to include leisure uses, which would be consistent with Policy PC11 (criterion D).

Policy PC09 (Brentwood Town Centre)

3.14 This policy relates to specific improvements within Brentwood Town Centre. The findings of this update, changes to the UCO and the implications of the Covid-19 crisis should not affect the overarching objectives of Policy PC09.

Policy PC10 (Mixed Use Development in Designated Centres)

3.15 Promotes mixed use development within designated centres, which is consistent with the NPPF, which suggests centres should be allowed to grow and diversify in a way that can respond to rapid changes. A suitable mix of uses should reflect the distinctive character of centres.

3.16 Policy PC10 seeks to control the loss of retail and other main town centre uses. The policy does not refer to specific use classes e.g. A1 or D2 and therefore proposed changes to the UCO do not necessarily require amendments to this policy.

3.17 Despite the proposed changes to the UCO, the NPPF still clearly sets out what uses are considered to be main town centre uses. Intensive leisure uses within Class D2 are main town centre uses, whilst less intensive sport uses within the same Class D2 are not main town centre uses. The range of uses included within the new Class E will generally be considered to be retail or other main town centre uses and Policy PC10, as currently worded, can and should still apply. However, some minor changes are required as follows.

3.18 Criterion C (d) refers to hot food takeaways as “use class A5”. This reference and paragraph 7.75 should be removed. In addition, Criterion D refers to changes of use from retail to “another centre uses as set out in Figure 7.8”. This text could be amended to refer to changes of use from “Class E to another centre uses” or alternatively Criterion D could be deleted. Supporting text at paragraphs 7.72 and 7.73 would need to be amended accordingly.

3.19 Figure 7.8 needs to be amended to take on board changes to the UCO. The Council should consider including B1 business use as a centre use rather than non-centre use to reflect its inclusion in new Class E.

Policy PC11 (Primary Shopping Areas)

3.20 As indicated above, the designation of a PSA for application of the sequential approach is unclear following proposed changes to the UCO. However, continuing to encourage and retain retail uses within the PSA may still be a valid objective, although some of the changes to the UCO restrict the ability to protect against the loss of retail uses.

3.21 As with Policy PC10, Policy PC11 does not specifically refer to use classes and therefore proposed changes to the UCO do not necessarily require amendments to this policy. However, Criterion C should be amended to refer to “Class E town centre uses” rather than “retail” and this amended criterion could seek to retain active frontages/shop windows in order to protect the character of the PSA.

3.22 Criterion D should be amended to refer to retail and leisure development outside the designated centres rather than the PSA.

Policy PC12 (Non-Centre Uses)

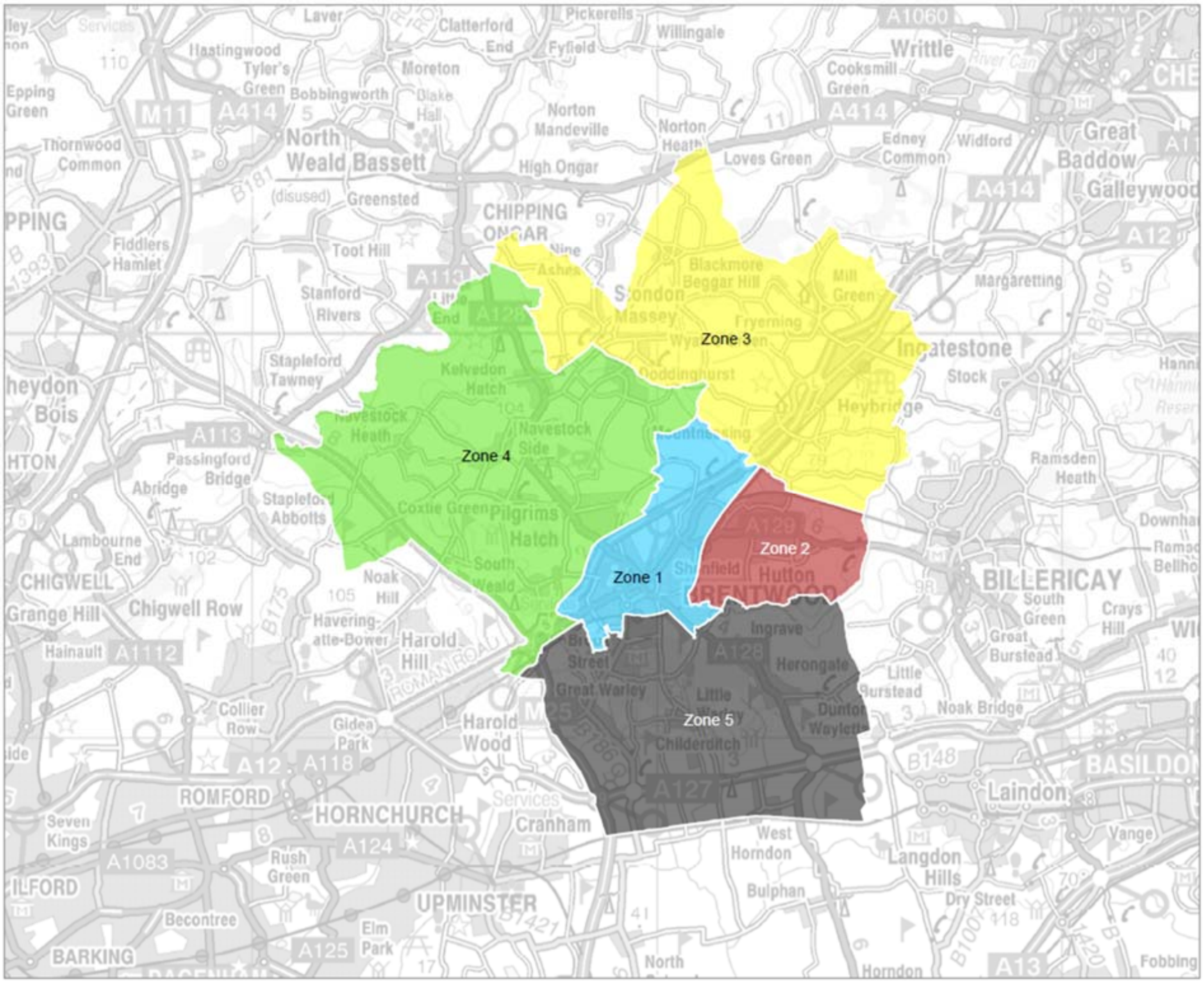
3.23 This policy relates to non-centre uses in designated centres. As indicated above, Figure 7.8 which lists centre and non-centre uses should be amended to reflect changes to the UCO.

3.24 Criterion A could be amended to refer to the contribution to the retail and service functions of the centre, rather than just retail, reflecting the benefits of diversification.

Policy PC13 (Night Time Economy)

3.25 As with Policies PC10 and PC11, this policy does not specifically refer to use classes and therefore proposed changes to the UCO do not necessarily require amendments to this policy. The objectives of preventing harm to the amenity of the surrounding area remains appropriate.

Appendix 1 Study area zones


Zone 1
Zone 2
Zone 3
Zone 4
Zone 5

Appendix 2 Convenience goods capacity

Table 1: Study area population projections

Zone	2016	2020	2023	2028	2033
Zone 1 - Brentwood/Shenfield	26,521	27,114	27,595	28,059	28,326
Zone 2 - Hutton	15,578	16,259	16,598	16,921	17,186
Zone 3 - Ingatestone	9,773	10,444	10,569	10,680	10,801
Zone 4 - Pilgrims Hatch	13,812	14,313	14,366	14,408	14,456
Zone 5 - Herongate/Ingrave	9,685	10,607	11,071	11,080	11,249
Dunton Hills GV/West Horndon	0	0	321	2,316	3,851
Total	**75,369**	**78,737**	**80,520**	**83,464**	**85,869**

Source: Experian MMG3 and distribution of growth based on Local Plan housing allocation trajectory.

Table 2: Convenience goods expenditure per person (£)

Zone	2016	2020	2023	2028	2033
Zone 1 - Brentwood/Shenfield	2,289	2,310	2,307	2,297	2,298
Zone 2 - Hutton	2,330	2,351	2,348	2,337	2,339
Zone 3 - Ingatestone	2,406	2,428	2,425	2,414	2,416
Zone 4 - Pilgrims Hatch	2,202	2,222	2,219	2,209	2,210
Zone 5 - Herongate/Ingrave	2,243	2,264	2,261	2,250	2,252
Dunton Hills GV/West Horndon	2,243	2,264	2,261	2,250	2,252

Sources:
Experian Local Expenditure 2018 (2018 prices)
Experian growth rates from Retail Planner Briefing Note 17 - Figures 1a and 1b
Excludes Special Forms of Trading - Experian adjusted SFT Retail Planner Breifing Note 17 - Figure 5

Table 3: Total convenience goods expenditure (£m)

Zone	2016	2020	2023	2028	2033
Zone 1 - Brentwood/Shenfield	60.71	62.63	63.66	64.45	65.09
Zone 2 - Hutton	36.30	38.22	38.97	39.54	40.20
Zone 3 - Ingatestone	23.51	25.36	25.63	25.78	26.10
Zone 4 - Pilgrims Hatch	30.41	31.80	31.88	31.83	31.95
Zone 5 - Herongate/Ingrave	21.72	24.01	25.03	24.93	25.33
Dunton Hills GV/West Horndon	0.00	0.00	0.73	5.21	8.67
Total	**172.65**	**182.03**	**185.90**	**191.75**	**197.34**

Source: Tables 1 and 2

Table 4: Base year convenience goods market shares (%)

Destinations	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Dunton Hills GV/ West Hordon	% Inflow
Brentwood	71.7%	44.1%	26.2%	56.1%	60.4%	0.0%	10.0%
Shenfield	6.3%	8.9%	0.9%	0.5%	1.5%	0.0%	5.0%
Ingatestone	0.1%	0.0%	19.8%	0.0%	0.0%	0.0%	5.0%
Hutton	1.5%	17.8%	0.6%	0.3%	0.2%	0.0%	5.0%
Ingrave/Herongate/W. Horndon/Dunton Hills	0.2%	0.0%	0.0%	0.0%	3.5%	0.0%	5.0%
Other Brentwood Borough	0.2%	0.4%	8.1%	13.8%	0.5%	0.0%	5.0%
Brentwood Borough Total	**80.0%**	**71.2%**	**55.6%**	**70.7%**	**66.1%**	**0.0%**	
Basildon	3.3%	11.8%	1.4%	4.4%	18.2%	0.0%	n/a
Billericay	2.1%	6.4%	7.1%	0.4%	0.9%	0.0%	n/a
Romford/Harold Hill/Harold Wood	7.1%	6.2%	5.9%	13.0%	5.0%	0.0%	n/a
Chelmsford	1.7%	2.4%	19.5%	5.5%	0.0%	0.0%	n/a
Chipping Ongar	0.3%	0.0%	7.5%	3.3%	0.0%	0.0%	n/a
Other	5.5%	2.0%	3.0%	2.7%	9.8%	0.0%	n/a
Sub-Total	**20.0%**	**28.8%**	**44.4%**	**29.3%**	**33.9%**	**0.0%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**0.0%**	

Source: NEMS Household Survey June 2014

Table 5: Base year 2016 convenience goods expenditure (£m)

Destinations	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Dunton Hills GV/ West Hordon	Inflow	Total
Expenditure 2016	**60.71**	**36.30**	**23.51**	**30.41**	**21.72**	**0.00**		**172.65**
Brentwood	43.53	16.01	6.16	17.06	13.12	0.00	10.65	106.53
Shenfield	3.82	3.23	0.21	0.15	0.33	0.00	0.41	8.15
Ingatestone	0.06	0.00	4.66	0.00	0.00	0.00	0.25	4.96
Hutton	0.91	6.46	0.14	0.09	0.04	0.00	0.40	8.05
Ingrave/Herongate/W. Horndon/Dunton Hills	0.12	0.00	0.00	0.00	0.76	0.00	0.05	0.93
Other Brentwood Borough	0.12	0.15	1.90	4.20	0.11	0.00	0.34	6.82
Brentwood Borough Total	**48.57**	**25.84**	**13.07**	**21.50**	**14.36**	**0.00**	**12.10**	**135.44**
Basildon	2.00	4.28	0.33	1.34	3.95	0.00	n/a	11.91
Billericay	1.27	2.32	1.67	0.12	0.20	0.00	n/a	5.58
Romford/Harold Hill/Harold Wood	4.31	2.25	1.39	3.95	1.09	0.00	n/a	12.99
Chelmsford	1.03	0.87	4.59	1.67	0.00	0.00	n/a	8.16
Chipping Ongar	0.18	0.00	1.76	1.00	0.00	0.00	n/a	2.95
Other	3.34	0.73	0.71	0.82	2.13	0.00	n/a	7.72
Sub-Total	**12.14**	**10.45**	**10.44**	**8.91**	**7.36**	**0.00**	**n/a**	**49.31**
TOTAL	**60.71**	**36.30**	**23.51**	**30.41**	**21.72**	**0.00**		**184.75**

Source: Table 3 and 4

Table 6: Current 2020 convenience goods expenditure (£m)

Destinations	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Dunton Hills GV/ West Hordon	Inflow	Total
Expenditure 2020	**62.63**	**38.22**	**25.36**	**31.80**	**24.01**	**0.00**		**182.03**
Brentwood	44.91	16.86	6.64	17.84	14.50	0.00	11.20	111.95
Shenfield	3.95	3.40	0.23	0.16	0.36	0.00	0.43	8.52
Ingatestone	0.06	0.00	5.02	0.00	0.00	0.00	0.27	5.35
Hutton	0.94	6.80	0.15	0.10	0.05	0.00	0.42	8.46
Ingrave/Herongate/W. Horndon/Dunton Hills	0.13	0.00	0.00	0.00	0.84	0.00	0.05	1.02
Other Brentwood Borough	0.13	0.15	2.05	4.39	0.12	0.00	0.36	7.20
Brentwood Borough Total	**50.11**	**27.22**	**14.10**	**22.49**	**15.87**	**0.00**	**12.72**	**142.50**
Basildon	2.07	4.51	0.36	1.40	4.37	0.00	n/a	12.70
Billericay	1.32	2.45	1.80	0.13	0.22	0.00	n/a	5.91
Romford/Harold Hill/Harold Wood	4.45	2.37	1.50	4.13	1.20	0.00	n/a	13.65
Chelmsford	1.06	0.92	4.94	1.75	0.00	0.00	n/a	8.68
Chipping Ongar	0.19	0.00	1.90	1.05	0.00	0.00	n/a	3.14
Other	3.44	0.76	0.76	0.86	2.35	0.00	n/a	8.18
Sub-Total	**12.53**	**11.01**	**11.26**	**9.32**	**8.14**	**0.00**	**n/a**	**52.25**
TOTAL	**62.63**	**38.22**	**25.36**	**31.80**	**24.01**	**0.00**		**194.76**

Source: Table 3 and 4

Table 7: Convenience goods floorspace and benchmark turnover at 2020

Centre	Store	Sales Floorspace (sq.m net)	% Convenience Goods Floorspace	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Brentwood	Sainsbury's, William Hunter Way Brentwood	6,112	70%	4,278	£11,526	£49.31
	M&S, High Street, Brentwood	838	95%	796	£10,313	£8.21
	Iceland, High Street, Brentwood	609	95%	579	£6,645	£3.84
	Other Convenience Shops - Brentwood Town Centre	1,000	100%	1,000	£6,000	£6.00
	Tesco Express, London Road	116	95%	110	£13,236	£1.46
	McColl's, Ongar Road	178	95%	169	£6,418	£1.09
	McColl's, Eagle Way	79	95%	75	£6,418	£0.48
	Tesco, Warley Hill Express	253	95%	240	£13,236	£3.18
	M&S, Ongar Road (BP)	84	95%	80	£10,313	£0.82
	Other Convenience Shops - Warley Hill	420	100%	420	£6,000	£2.52
	Sub-Total	**9,689**		**7,748**		**£76.92**
Shenfield	Tesco, Shenfield Express	215	95%	204	£13,236	£2.70
	Co-op, Shenfield	293	95%	278	£11,171	£3.11
	M&S, Shenfield (BP)	84	95%	80	£10,313	£0.82
	M&S, Chelmsford Road (BP)	84	95%	80	£10,313	£0.82
	Sub-Total	**676**		**642**		**£7.46**
Ingatestone	Co-op, Ingatestone	364	90%	328	£11,171	£3.66
	Budgens, Ingatestone	358	90%	322	£8,354	£2.69
	McColl's, Ingatestone	132	95%	125	£6,418	£0.80
	Sub-Total	**854**		**775**		**£7.16**
Hutton	Co-op, Rayleigh Road, Hutton	124	95%	118	£11,171	£1.32
	Co-op, Woodland Ave., Hutton	106	95%	101	£11,171	£1.12
	Tesco Express, Hanging Hill Lane, Hutton	229	95%	218	£13,236	£2.88
	Sub-Total	**459**		**436**		**£5.32**
Ingrave/Herongate	M&S Ingrave BP	84	95%	80	£10,313	£0.82
West Hordon	McColl's, West Horndon	77	95%	73	£6,418	£0.47
	Sub-Total	**161**		**153**		**£1.29**
Other	Budgens, Doddinghurst	281	90%	253	£8,354	£2.11
	Co-op, Blackmore	336	90%	302	£11,171	£3.38
	Co-op, Pilgrims Hatch	143	95%	136	£11,171	£1.52
	Sub-Total	**760**		**691**		**£7.01**
Brentwood Total		**12,599**		**10,445**		**£105.15**

Source:
Floorspace from ORC's StorePoint (Quarter 2/2020) and Goad Plan for Brentwood town centre.
Company average sales densities from GlobalData.

Table 8: Future convenience goods market shares (%)

Destinations	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Dunton Hills GV/ West Hordon	% Inflow
Brentwood	71.7%	44.1%	26.2%	56.1%	33.0%	10.0%	10.0%
Shenfield	6.3%	8.9%	0.9%	0.5%	1.5%	0.0%	5.0%
Ingatestone	0.1%	0.0%	19.8%	0.0%	0.0%	0.0%	5.0%
Hutton	1.5%	17.8%	0.6%	0.3%	0.0%	0.0%	5.0%
Ingrave/Herongate/W. Horndon/Dunton Hills	0.2%	0.0%	0.0%	0.0%	45.0%	60.0%	15.0%
Other Brentwood Borough	0.2%	0.4%	8.1%	13.8%	1.0%	0.0%	5.0%
Brentwood Borough Total	**80.0%**	**71.2%**	**55.6%**	**70.7%**	**80.5%**	**70.0%**	
Basildon	3.3%	11.8%	1.4%	4.4%	10.0%	25.0%	n/a
Billericay	2.1%	6.4%	7.1%	0.4%	0.5%	0.0%	n/a
Romford/Harold Hill/Harold Wood	7.1%	6.2%	5.9%	13.0%	4.0%	0.0%	n/a
Chelmsford	1.7%	2.4%	19.5%	5.5%	0.0%	0.0%	n/a
Chipping Ongar	0.3%	0.0%	7.5%	3.3%	0.0%	0.0%	n/a
Other	5.5%	2.0%	3.0%	2.7%	5.0%	5.0%	n/a
Sub-Total	**20.0%**	**28.8%**	**44.4%**	**29.3%**	**19.5%**	**30.0%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey June 2014 with Lichfields' adjustments to reflect development at West Hordon and Dunton Hills.

Table 9: Future 2023 convenience goods expenditure (£m)

Destinations	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Dunton Hills GV/ West Hordon	Inflow	Total
Expenditure 2023	**63.66**	**38.97**	**25.63**	**31.88**	**25.03**	**0.73**		**185.90**
Brentwood	45.65	17.19	6.72	17.88	8.26	0.07	10.64	106.40
Shenfield	4.01	3.47	0.23	0.16	0.38	0.00	0.43	8.68
Ingatestone	0.06	0.00	5.07	0.00	0.00	0.00	0.27	5.41
Hutton	0.95	6.94	0.15	0.10	0.00	0.00	0.43	8.57
Ingrave/Herongate/W. Horndon/Dunton Hills	0.13	0.00	0.00	0.00	11.26	0.44	2.09	13.91
Other Brentwood Borough	0.13	0.16	2.08	4.40	0.25	0.00	0.37	7.38
Brentwood Borough Total	**50.93**	**27.75**	**14.25**	**22.54**	**20.15**	**0.51**	**14.23**	**150.35**
Basildon	2.10	4.60	0.36	1.40	2.50	0.18	n/a	11.15
Billericay	1.34	2.49	1.82	0.13	0.13	0.00	n/a	5.90
Romford/Harold Hill/Harold Wood	4.52	2.42	1.51	4.14	1.00	0.00	n/a	13.59
Chelmsford	1.08	0.94	5.00	1.75	0.00	0.00	n/a	8.77
Chipping Ongar	0.19	0.00	1.92	1.05	0.00	0.00	n/a	3.17
Other	3.50	0.78	0.77	0.86	1.25	0.04	n/a	7.20
Sub-Total	**12.73**	**11.22**	**11.38**	**9.34**	**4.88**	**0.22**	**n/a**	**49.78**
TOTAL	**63.66**	**38.97**	**25.63**	**31.88**	**25.03**	**0.73**		**200.13**

Source: Table 3 and 8

Table 10: Future 2028 convenience goods expenditure (£m)

Destinations	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Dunton Hills GV/ West Hordon	Inflow	Total
Expenditure 2028	**64.45**	**39.54**	**25.78**	**31.83**	**24.93**	**5.21**		**191.75**
Brentwood	46.21	17.44	6.75	17.86	8.23	0.52	10.78	107.79
Shenfield	4.06	3.52	0.23	0.16	0.37	0.00	0.44	8.78
Ingatestone	0.06	0.00	5.10	0.00	0.00	0.00	0.27	5.44
Hutton	0.97	7.04	0.15	0.10	0.00	0.00	0.43	8.69
Ingrave/Herongate/W. Horndon/Dunton Hills	0.13	0.00	0.00	0.00	11.22	3.13	2.55	17.03
Other Brentwood Borough	0.13	0.16	2.09	4.39	0.25	0.00	0.37	7.39
Brentwood Borough Total	**51.56**	**28.16**	**14.33**	**22.50**	**20.07**	**3.65**	**14.85**	**155.12**
Basildon	2.13	4.67	0.36	1.40	2.49	1.30	n/a	12.35
Billericay	1.35	2.53	1.83	0.13	0.12	0.00	n/a	5.97
Romford/Harold Hill/Harold Wood	4.58	2.45	1.52	4.14	1.00	0.00	n/a	13.68
Chelmsford	1.10	0.95	5.03	1.75	0.00	0.00	n/a	8.82
Chipping Ongar	0.19	0.00	1.93	1.05	0.00	0.00	n/a	3.18
Other	3.54	0.79	0.77	0.86	1.25	0.26	n/a	7.48
Sub-Total	**12.89**	**11.39**	**11.45**	**9.33**	**4.86**	**1.56**	**n/a**	**51.48**
TOTAL	**64.45**	**39.54**	**25.78**	**31.83**	**24.93**	**5.21**		**206.59**

Source: Table 3 and 8

Table 11: Future 2033 convenience goods expenditure (£m)

Destinations	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Dunton Hills GV/ West Hordon	Inflow	Total
Expenditure 2033	**65.09**	**40.20**	**26.10**	**31.95**	**25.33**	**8.67**		**197.34**
Brentwood	46.67	17.73	6.84	17.92	8.36	0.87	10.93	109.32
Shenfield	4.10	3.58	0.23	0.16	0.38	0.00	0.44	8.90
Ingatestone	0.07	0.00	5.17	0.00	0.00	0.00	0.28	5.51
Hutton	0.98	7.16	0.16	0.10	0.00	0.00	0.44	8.83
Ingrave/Herongate/W. Horndon/Dunton Hills	0.13	0.00	0.00	0.00	11.40	5.20	2.95	19.69
Other Brentwood Borough	0.13	0.16	2.11	4.41	0.25	0.00	0.37	7.44
Brentwood Borough Total	**52.07**	**28.62**	**14.51**	**22.59**	**20.39**	**6.07**	**15.42**	**159.67**
Basildon	2.15	4.74	0.37	1.41	2.53	2.17	n/a	13.36
Billericay	1.37	2.57	1.85	0.13	0.13	0.00	n/a	6.05
Romford/Harold Hill/Harold Wood	4.62	2.49	1.54	4.15	1.01	0.00	n/a	13.82
Chelmsford	1.11	0.96	5.09	1.76	0.00	0.00	n/a	8.92
Chipping Ongar	0.20	0.00	1.96	1.05	0.00	0.00	n/a	3.21
Other	3.58	0.80	0.78	0.86	1.27	0.43	n/a	7.73
Sub-Total	**13.02**	**11.58**	**11.59**	**9.36**	**4.94**	**2.60**	**n/a**	**53.08**
TOTAL	**65.09**	**40.20**	**26.10**	**31.95**	**25.33**	**8.67**		**212.76**

Source: Table 3 and 8

Table 12: Summary of convenience goods expenditure 2016 to 2033

	2016	2020	2023	2028	2033
Available expenditure in Brentwood Borough (£m)					
Brentwood	106.53	111.95	106.40	107.79	109.32
Shenfield	8.15	8.52	8.68	8.78	8.90
Ingatestone	4.96	5.35	5.41	5.44	5.51
Hutton	8.05	8.46	8.57	8.69	8.83
Ingrave/Herongate/W. Horndon/Dunton Hills	0.93	1.02	13.91	17.03	19.69
Other Brentwood Borough	6.82	7.20	7.38	7.39	7.44
Total	**135.44**	**142.50**	**150.35**	**155.12**	**159.67**
Turnover of existing facilities (£m)					
Brentwood	76.92	76.92	77.53	77.53	77.53
Shenfield	7.46	7.46	7.52	7.52	7.52
Ingatestone	7.16	7.16	7.21	7.21	7.21
Hutton	5.32	5.32	5.36	5.36	5.36
Ingrave/Herongate/W. Horndon/Dunton Hills	1.29	1.29	1.30	1.30	1.30
Other Brentwood Borough	7.01	7.01	7.06	7.06	7.06
Total	**105.15**	**105.15**	**106.00**	**106.00**	**106.00**
Surplus/Deficit expenditure (£m)					
Brentwood	29.61	35.03	28.87	30.25	31.78
Shenfield	0.69	1.06	1.16	1.27	1.38
Ingatestone	-2.19	-1.81	-1.80	-1.77	-1.71
Hutton	2.73	3.14	3.21	3.33	3.46
Ingrave/Herongate/W. Horndon/Dunton Hills	-0.36	-0.28	12.61	15.73	18.38
Other Brentwood Borough	-0.19	0.19	0.31	0.32	0.37
Total	**30.29**	**37.35**	**44.36**	**49.12**	**53.68**

Source: Tables 5 to 11

Table 13: Convenience goods floorspace expenditure capacity 2016 to 2033

	2016	2020	2023	2028	2033
Turnover density new floorspace (£ per sq.m)	£12,000	£12,000	£12,096	£12,096	£12,096
Sales floorspace requirement (sq.m net)					
Brentwood	2,468	2,919	2,387	2,501	2,628
Shenfield	58	89	96	105	114
Ingatestone	-183	-150	-149	-147	-141
Hutton	227	262	265	275	286
Ingrave/Herongate/W. Horndon/Dunton Hills	-30	-23	1,043	1,300	1,520
Other Brentwood Borough	-16	16	26	27	31
Total	**2,524**	**3,112**	**3,667**	**4,061**	**4,438**
Gross floorspace requirement (sq.m gross)					
Brentwood	3,525	4,171	3,410	3,573	3,754
Shenfield	83	126	137	149	163
Ingatestone	-261	-215	-213	-209	-201
Hutton	325	374	379	393	409
Ingrave/Herongate/W. Horndon/Dunton Hills	-43	-33	1,489	1,857	2,171
Other Brentwood Borough	-23	23	37	38	44
Total	**3,606**	**4,446**	**5,239**	**5,801**	**6,339**

Appendix 3 Comparison goods capacity

Table 1: Study area population projections

Zone	2016	2020	2023	2028	2033
Zone 1 - Brentwood/Shenfield	26,521	27,114	27,595	28,059	28,326
Zone 2 - Hutton	15,578	16,259	16,598	16,921	17,186
Zone 3 - Ingatestone	9,773	10,444	10,569	10,680	10,801
Zone 4 - Pilgrims Hatch	13,812	14,313	14,366	14,408	14,456
Zone 5 - Herongate/Ingrave	9,685	10,607	11,071	11,080	11,249
Dunton Hills GV/West Horndon	0	0	321	2,316	3,851
Total	**75,369**	**78,737**	**80,520**	**83,464**	**85,869**

Source: Experian MMG3 and distribution of growth based on Local Plan housing allocation trajectory.

Table 2: Comparison goods expenditure per person (£)

Zone	2016	2020	2023	2028	2033
Zone 1 - Brentwood/Shenfield	3,558	3,933	4,206	4,726	5,371
Zone 2 - Hutton	3,674	4,061	4,343	4,779	5,545
Zone 3 - Ingatestone	3,828	4,231	4,525	5,083	5,778
Zone 4 - Pilgrims Hatch	3,324	3,675	3,930	4,415	5,018
Zone 5 - Herongate/Ingrave	3,579	3,956	4,231	4,753	5,402
Dunton Hills GV/West Horndon	3,579	3,956	4,231	4,753	5,402

Sources:
Experian Local Expenditure 2018 (2018 prices)
Experian growth rates from Retail Planner Briefing Note 17 - Figures 1a and 1b
Excludes Special Forms of Trading - Experian adjusted SFT Retail Planner Breifing Note 17 - Figure 5

Table 3: Total comparison goods expenditure (£m)

Zone	2016	2020	2023	2028	2033
Zone 1 - Brentwood/Shenfield	94.36	106.64	116.06	132.61	152.14
Zone 2 - Hutton	57.23	66.03	72.09	80.87	95.30
Zone 3 - Ingatestone	37.41	44.19	47.82	54.29	62.41
Zone 4 - Pilgrims Hatch	45.91	52.60	56.46	63.61	72.54
Zone 5 - Herongate/Ingrave	34.66	41.96	46.84	52.66	60.77
Dunton Hills GV/West Horndon	0.00	0.00	1.36	11.01	20.80
Total	**269.58**	**311.42**	**340.63**	**395.04**	**463.95**

Source: Tables 1 and 2

Table 4: Base year comparison goods market shares (%)

Destination	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Dunton Hills/ West Horndon	% Inflow
Brentwood	36.5%	28.8%	20.8%	28.7%	32.5%	0.0%	10.0%
Shenfield District Centre	1.0%	1.2%	0.4%	0.1%	0.1%	0.0%	5.0%
Ingatestone District Centre	0.1%	0.2%	3.1%	0.1%	0.0%	0.0%	5.0%
Ingrave/Herongate/West Horndon	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	5.0%
Other Brentwood Borough	0.2%	1.0%	0.7%	0.4%	0.0%	0.0%	5.0%
Brentwood Borough Total	**37.8%**	**31.2%**	**25.0%**	**29.3%**	**32.8%**	**0.0%**	
Basildon	3.3%	12.7%	3.1%	3.8%	11.4%	0.0%	n/a
Billericay	0.2%	2.2%	1.1%	0.0%	0.7%	0.0%	n/a
Romford/Harold Hill	13.6%	10.7%	10.2%	18.8%	11.5%	0.0%	n/a
Chelmsford	4.8%	7.8%	29.4%	7.8%	2.4%	0.0%	n/a
intu Lakeside	26.0%	22.0%	16.2%	28.7%	27.0%	0.0%	n/a
Other	14.3%	13.4%	15.0%	11.6%	14.2%	0.0%	n/a
Sub-Total	**62.2%**	**68.8%**	**75.0%**	**70.7%**	**67.2%**	**0.0%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**0.0%**	

Source: NEMS Household Survey June 2014

Table 5: Base year 2016 comparison goods expenditure (£m)

Destination	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Dunton Hills/ West Horndon	Inflow	Total
Expenditure 2016	**94.36**	**57.23**	**37.41**	**45.91**	**34.66**	**0.00**		**269.58**
Brentwood Town Centre	34.44	16.48	7.78	13.18	11.27	0.00	9.24	92.39
Shenfield District Centre	0.94	0.69	0.15	0.05	0.03	0.00	0.10	1.96
Ingatestone District Centre	0.09	0.11	1.16	0.05	0.00	0.00	0.07	1.49
Ingrave/Herongate/West Horndon	0.00	0.00	0.00	0.00	0.07	0.00	0.00	0.07
Other Brentwood Borough	0.19	0.57	0.26	0.18	0.00	0.00	0.06	1.27
Brentwood Borough Total	**35.67**	**17.86**	**9.35**	**13.45**	**11.37**	**0.00**	**9.48**	**97.18**
Basildon	3.11	7.27	1.16	1.74	3.95	0.00	n/a	17.24
Billericay	0.19	1.26	0.41	0.00	0.24	0.00	n/a	2.10
Romford/Harold Hill	12.83	6.12	3.82	8.63	3.99	0.00	n/a	35.39
Chelmsford	4.53	4.46	11.00	3.58	0.83	0.00	n/a	24.41
intu Lakeside	24.53	12.59	6.06	13.18	9.36	0.00	n/a	65.72
Other	13.49	7.67	5.61	5.33	4.92	0.00	n/a	37.02
Sub-Total	**58.69**	**39.38**	**28.06**	**32.46**	**23.29**	**0.00**		**181.88**
TOTAL	**94.36**	**57.23**	**37.41**	**45.91**	**34.66**	**0.00**		**279.06**

Source: Table 3 and 4

Table 6: Current 2020 comparison goods expenditure (£m)

Destination	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Dunton Hills/ West Horndon	Inflow	Total
Expenditure 2020	**106.64**	**66.03**	**44.19**	**52.60**	**41.96**	**0.00**		**311.42**
Brentwood Town Centre	38.92	19.02	9.19	15.10	13.64	0.00	10.65	106.52
Shenfield District Centre	1.07	0.79	0.18	0.05	0.04	0.00	0.11	2.24
Ingatestone District Centre	0.11	0.13	1.37	0.05	0.00	0.00	0.09	1.75
Ingrave/Herongate/West Horndon	0.00	0.00	0.00	0.00	0.08	0.00	0.00	0.09
Other Brentwood Borough	0.21	0.66	0.31	0.21	0.00	0.00	0.07	1.47
Brentwood Borough Total	**40.31**	**20.60**	**11.05**	**15.41**	**13.76**	**0.00**	**10.93**	**112.06**
Basildon	3.52	8.39	1.37	2.00	4.78	0.00	n/a	20.06
Billericay	0.21	1.45	0.49	0.00	0.29	0.00	n/a	2.45
Romford/Harold Hill	14.50	7.06	4.51	9.89	4.83	0.00	n/a	40.79
Chelmsford	5.12	5.15	12.99	4.10	1.01	0.00	n/a	28.37
intu Lakeside	27.73	14.53	7.16	15.10	11.33	0.00	n/a	75.84
Other	15.25	8.85	6.63	6.10	5.96	0.00	n/a	42.79
Sub-Total	**66.33**	**45.43**	**33.14**	**37.19**	**28.20**	**0.00**		**210.28**
TOTAL	**106.64**	**66.03**	**44.19**	**52.60**	**41.96**	**0.00**		**322.35**

Source: Table 3 and 4

Table 7: Future comparison goods market shares (%)

Destination	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Dunton Hills/ West Horndon	% Inflow
Brentwood	36.5%	28.8%	20.8%	28.7%	32.2%	25.0%	10.0%
Shenfield District Centre	1.0%	1.2%	0.4%	0.1%	0.1%	0.0%	5.0%
Ingatestone District Centre	0.1%	0.2%	3.1%	0.1%	0.0%	0.0%	5.0%
Ingrave/Herongate/W.Horndon/Dunton Hills	0.0%	0.0%	0.0%	0.0%	6.0%	15.0%	5.0%
Other Brentwood Borough	0.2%	1.0%	0.7%	0.4%	0.0%	0.0%	5.0%
Brentwood Borough Total	**37.8%**	**31.2%**	**25.0%**	**29.3%**	**38.3%**	**40.0%**	
Basildon	3.3%	12.7%	3.1%	3.8%	10.4%	30.0%	n/a
Billericay	0.2%	2.2%	1.1%	0.0%	0.6%	0.0%	n/a
Romford/Harold Hill	13.6%	10.7%	10.2%	18.8%	11.1%	0.0%	n/a
Chelmsford	4.8%	7.8%	29.4%	7.8%	2.3%	0.0%	n/a
intu Lakeside	26.0%	22.0%	16.2%	28.7%	25.5%	25.0%	n/a
Other	14.3%	13.4%	15.0%	11.6%	11.8%	5.0%	n/a
Sub-Total	**62.2%**	**68.8%**	**75.0%**	**70.7%**	**61.7%**	**60.0%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey June 2014 with Lichfields' adjustments to reflect development at West Horndon and Dunton Hills.

Table 8: Future 2023 comparison goods expenditure (£m)

Destination	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Dunton Hills/ West Horndon	Inflow	Total
Expenditure 2023	**116.06**	**72.09**	**47.82**	**56.46**	**46.84**	**1.36**		**340.63**
Brentwood Town Centre	42.36	20.76	9.95	16.20	15.08	0.34	11.63	116.33
Shenfield District Centre	1.16	0.87	0.19	0.06	0.05	0.00	0.12	2.44
Ingatestone District Centre	0.12	0.14	1.48	0.06	0.00	0.00	0.09	1.89
Ingrave/Herongate/W. Horndon/Dunton Hills	0.00	0.00	0.00	0.00	2.81	0.20	0.16	3.17
Other Brentwood Borough	0.23	0.72	0.33	0.23	0.00	0.00	0.08	1.59
Brentwood Borough Total	**43.87**	**22.49**	**11.96**	**16.54**	**17.94**	**0.54**	**12.09**	**125.43**
Basildon	3.83	9.15	1.48	2.15	4.87	0.41	n/a	21.89
Billericay	0.23	1.59	0.53	0.00	0.28	0.00	n/a	2.63
Romford/Harold Hill	15.78	7.71	4.88	10.61	5.20	0.00	n/a	44.19
Chelmsford	5.57	5.62	14.06	4.40	1.08	0.00	n/a	30.74
intu Lakeside	30.18	15.86	7.75	16.20	11.94	0.34	n/a	82.27
Other	16.60	9.66	7.17	6.55	5.53	0.07	n/a	45.57
Sub-Total	**72.19**	**49.59**	**35.87**	**39.92**	**28.90**	**0.81**		**227.29**
TOTAL	**116.06**	**72.09**	**47.82**	**56.46**	**46.84**	**1.36**		**352.72**

Source: Table 3 and 7

Table 9: Future 2028 comparison goods expenditure (£m)

Destination	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Dunton Hills/ West Horndon	Inflow	Total
Expenditure 2028	**132.61**	**80.87**	**54.29**	**63.61**	**52.66**	**11.01**		**395.04**
Brentwood Town Centre	48.40	23.29	11.29	18.26	16.96	2.75	13.44	134.39
Shenfield District Centre	1.33	0.97	0.22	0.06	0.05	0.00	0.14	2.77
Ingatestone District Centre	0.13	0.16	1.68	0.06	0.00	0.00	0.11	2.15
Ingrave/Herongate/W. Horndon/Dunton Hills	0.00	0.00	0.00	0.00	3.16	1.65	0.25	5.06
Other Brentwood Borough	0.27	0.81	0.38	0.25	0.00	0.00	0.09	1.80
Brentwood Borough Total	**50.13**	**25.23**	**13.57**	**18.64**	**20.17**	**4.40**	**14.03**	**146.17**
Basildon	4.38	10.27	1.68	2.42	5.48	3.30	n/a	27.53
Billericay	0.27	1.78	0.60	0.00	0.32	0.00	n/a	2.96
Romford/Harold Hill	18.03	8.65	5.54	11.96	5.85	0.00	n/a	50.03
Chelmsford	6.37	6.31	15.96	4.96	1.21	0.00	n/a	34.81
intu Lakeside	34.48	17.79	8.79	18.26	13.43	2.75	n/a	95.50
Other	18.96	10.84	8.14	7.38	6.21	0.55	n/a	52.09
Sub-Total	**82.48**	**55.64**	**40.71**	**44.97**	**32.49**	**6.60**		**262.90**
TOTAL	**132.61**	**80.87**	**54.29**	**63.61**	**52.66**	**11.01**		**409.07**

Source: Table 3 and 7

Table 10: Future 2033 comparison goods expenditure (£m)

Destination	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Dunton Hills/ West Horndon	Inflow	Total
Expenditure 2033	**152.14**	**95.30**	**62.41**	**72.54**	**60.77**	**20.80**		**463.95**
Brentwood Town Centre	55.53	27.45	12.98	20.82	19.57	5.20	15.73	157.27
Shenfield District Centre	1.52	1.14	0.25	0.07	0.06	0.00	0.16	3.21
Ingatestone District Centre	0.15	0.19	1.93	0.07	0.00	0.00	0.12	2.47
Ingrave/Herongate/W. Horndon/Dunton Hills	0.00	0.00	0.00	0.00	3.65	3.12	0.36	7.12
Other Brentwood Borough	0.30	0.95	0.44	0.29	0.00	0.00	0.10	2.09
Brentwood Borough Total	**57.51**	**29.73**	**15.60**	**21.25**	**23.27**	**8.32**	**16.47**	**172.16**
Basildon	5.02	12.10	1.93	2.76	6.32	6.24	n/a	34.38
Billericay	0.30	2.10	0.69	0.00	0.36	0.00	n/a	3.45
Romford/Harold Hill	20.69	10.20	6.37	13.64	6.75	0.00	n/a	57.64
Chelmsford	7.30	7.43	18.35	5.66	1.40	0.00	n/a	40.14
intu Lakeside	39.56	20.97	10.11	20.82	15.50	5.20	n/a	112.15
Other	21.76	12.77	9.36	8.41	7.17	1.04	n/a	60.51
Sub-Total	**94.63**	**65.56**	**46.81**	**51.29**	**37.49**	**12.48**		**308.26**
TOTAL	**152.14**	**95.30**	**62.41**	**72.54**	**60.77**	**20.80**		**480.43**

Source: Table 3 and 7

Table 11: Summary of comparison goods expenditure 2016 to 2033

	2016	2020	2023	2028	2033
Available expenditure in Brentwood Borough (£m)					
Brentwood Town Centre	92.39	106.52	116.33	134.39	157.27
Shenfield District Centre	1.96	2.24	2.44	2.77	3.21
Ingatestone District Centre	1.49	1.75	1.89	2.15	2.47
Ingrave/Herongate/West Horndon/Dunton Hills	0.07	0.09	3.17	5.06	7.12
Other Brentwood Borough	1.27	1.47	1.59	1.80	2.09
Total	**97.18**	**112.06**	**125.43**	**146.17**	**172.16**
Turnover of existing facilities (£m)					
Brentwood Town Centre	92.39	102.57	113.61	132.34	151.20
Shenfield District Centre	1.96	2.17	2.41	2.81	3.21
Ingatestone District Centre	1.49	1.65	1.83	2.13	2.44
Ingrave/Herongate/West Horndon/Dunton Hills	0.07	0.08	0.09	0.10	0.12
Other Brentwood Borough	1.27	1.41	1.56	1.82	2.08
Total	**97.18**	**107.89**	**119.50**	**139.20**	**159.04**
Surplus expenditure (£m)					
Brentwood Town Centre	n/a	3.95	2.72	2.04	6.07
Shenfield District Centre	n/a	0.07	0.03	-0.04	0.00
Ingatestone District Centre	n/a	0.10	0.06	0.02	0.04
Ingrave/Herongate/West Horndon/Dunton Hills	n/a	0.01	3.08	4.96	7.00
Other Brentwood Borough	n/a	0.06	0.03	-0.02	0.01
Total	**n/a**	**4.18**	**5.93**	**6.96**	**13.12**

Source: Tables 5 to 10

Table 12: Comparison goods floorspace capacity 2016 to 2033

	2016	2020	2023	2028	2033
Turnover density new floorspace (£ per sq.m)	£5,000	£5,551	£6,148	£7,162	£8,183
Sales floorspace requirement (sq.m net)					
Brentwood Town Centre	n/a	711	443	285	742
Shenfield District Centre	n/a	12	6	-5	0
Ingatestone District Centre	n/a	17	10	2	5
Ingrave/Herongate/West Horndon/Dunton Hills	n/a	1	501	692	856
Other Brentwood Borough	n/a	10	5	-3	1
Total	**n/a**	**752**	**965**	**972**	**1,604**
Gross floorspace requirement (sq.m gross)					
Brentwood Town Centre	n/a	948	590	381	989
Shenfield District Centre	n/a	16	7	-7	0
Ingatestone District Centre	n/a	23	14	3	6
Ingrave/Herongate/West Horndon/Dunton Hills	n/a	2	669	923	1,141
Other Brentwood Borough	n/a	14	7	-4	2
Total	**n/a**	**1,003**	**1,287**	**1,296**	**2,139**

Appendix 4 Food/beverage capacity

Table 1: Study area population projections

Zone	2016	2020	2023	2028	2033
Zone 1 - Brentwood/Shenfield	26,521	27,114	27,595	28,059	28,326
Zone 2 - Hutton	15,578	16,259	16,598	16,921	17,186
Zone 3 - Ingatestone	9,773	10,444	10,569	10,680	10,801
Zone 4 - Pilgrims Hatch	13,812	14,313	14,366	14,408	14,456
Zone 5 - Herongate/Ingrave	9,685	10,607	11,071	11,080	11,249
Dunton Hills GV/West Horndon	0	0	321	2,316	3,851
Total	**75,369**	**78,737**	**80,520**	**83,464**	**85,869**

Source: Experian MMG3 and distribution of growth based on Local Plan housing allocation trajectory.

Table 2: Food and beverage expenditure per person (£)

Zone	2016	2020	2023	2028	2033
Zone 1 - Brentwood/Shenfield	1,694	1,720	1,779	1,885	1,990
Zone 2 - Hutton	1,679	1,705	1,763	1,868	1,973
Zone 3 - Ingatestone	1,672	1,698	1,756	1,860	1,965
Zone 4 - Pilgrims Hatch	1,453	1,475	1,526	1,616	1,707
Zone 5 - Herongate/Ingrave	1,618	1,642	1,699	1,800	1,901
Dunton Hills GV/West Horndon	1,618	1,642	1,699	1,800	1,901

Sources:
Experian Local Expenditure 2018 (2018 prices)
Experian leisure expenditure growth rates from Retail Planner Briefing Note 17 - Figures 1a and 1b

Table 3: Total food and beverage expenditure (£m)

Zone	2016	2020	2023	2028	2033
Zone 1 - Brentwood/Shenfield	44.93	46.64	49.09	52.89	56.37
Zone 2 - Hutton	26.16	27.72	29.26	31.61	33.91
Zone 3 - Ingatestone	16.34	17.73	18.56	19.86	21.22
Zone 4 - Pilgrims Hatch	20.07	21.11	21.92	23.28	24.68
Zone 5 - Herongate/Ingrave	15.67	17.42	18.81	19.94	21.38
Dunton Hills GV/West Horndon	0.00	0.00	0.55	4.17	7.32
Total	**123.16**	**130.62**	**138.19**	**151.76**	**164.88**

Source: Tables 1 and 2

Table 4: Base Year 2016 food and beverage market shares (%)

Destination	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Dunton Hills/ West Horndon	% Inflow
Brentwood Town Centre	56.7%	39.4%	20.3%	60.6%	40.2%	0.0%	10.0%
Shenfield District Centre	9.2%	14.8%	4.6%	0.8%	1.0%	0.0%	5.0%
Ingatestone District Centre	0.3%	2.8%	23.2%	1.1%	1.0%	0.0%	5.0%
Ingrave/Herongate/W. Horndon	0.4%	0.4%	0.0%	0.0%	2.8%	0.0%	5.0%
Other Brentwood Borough	4.4%	5.9%	11.7%	11.8%	7.3%	0.0%	5.0%
Brentwood Borough Total	**71.0%**	**63.3%**	**59.8%**	**74.3%**	**52.3%**	**0.0%**	
Basildon	1.7%	3.7%	0.3%	0.0%	1.4%	0.0%	n/a
Billericay	1.8%	12.0%	1.3%	1.8%	0.4%	0.0%	n/a
Romford	1.1%	1.3%	1.4%	3.1%	0.0%	0.0%	n/a
Chelmsford	2.1%	3.0%	17.6%	2.8%	0.0%	0.0%	n/a
intu Lakeside	3.0%	0.6%	0.8%	0.5%	1.2%	0.0%	n/a
Other	19.3%	16.1%	18.8%	17.5%	44.7%	0.0%	n/a
Other Sub-Total	**29.0%**	**36.7%**	**40.2%**	**25.7%**	**47.7%**	**0.0%**	n/a
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**0.0%**	n/a

Source: NEMS Household Survey June 2014

Table 5: Base Year 2016 food and beverage expenditure (£m)

Destination	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Dunton Hills/ West Horndon	% Inflow	Total
Expenditure 2016	**44.93**	**26.16**	**16.34**	**20.07**	**15.67**	**0.00**		**123.16**
Brentwood Town Centre	25.47	10.31	3.32	12.16	6.30	0.00	6.40	63.95
Shenfield District Centre	4.13	3.87	0.75	0.16	0.16	0.00	0.48	9.55
Ingatestone District Centre	0.13	0.73	3.79	0.22	0.16	0.00	0.27	5.30
Ingrave/Herongate/W. Horndon	0.18	0.10	0.00	0.00	0.44	0.00	0.04	0.76
Other Brentwood Borough	1.98	1.54	1.91	2.37	1.14	0.00	0.47	9.41
Brentwood Borough Total	**31.90**	**16.56**	**9.77**	**14.91**	**8.20**	**0.00**	**7.65**	**88.98**
Basildon	0.76	0.97	0.05	0.00	0.22	0.00	n/a	2.00
Billericay	0.81	3.14	0.21	0.36	0.06	0.00	n/a	4.58
Romford/Harold Hill	0.49	0.34	0.23	0.62	0.00	0.00	n/a	1.69
Chelmsford	0.94	0.78	2.88	0.56	0.00	0.00	n/a	5.17
intu Lakeside	1.35	0.16	0.13	0.10	0.19	0.00	n/a	1.92
Other	8.67	4.21	3.07	3.51	7.00	0.00	n/a	26.47
Other Sub-Total	**13.03**	**9.60**	**6.57**	**5.16**	**7.47**	**0.00**	**n/a**	**41.83**
TOTAL	**44.93**	**26.16**	**16.34**	**20.07**	**15.67**	**0.00**	n/a	**130.81**

Source: Table 3 and 4

Table 6: Current 2020 food and beverage expenditure (£m)

Destination	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Dunton Hills/ West Horndon	% Inflow	Total
Expenditure 2020	**46.64**	**27.72**	**17.73**	**21.11**	**17.42**	**0.00**		**130.62**
Brentwood Town Centre	26.44	10.92	3.60	12.79	7.00	0.00	6.75	67.51
Shenfield District Centre	4.29	4.10	0.82	0.17	0.17	0.00	0.50	10.05
Ingatestone District Centre	0.14	0.78	4.11	0.23	0.17	0.00	0.29	5.72
Ingrave/Herongate/W. Horndon	0.19	0.11	0.00	0.00	0.49	0.00	0.04	0.83
Other Brentwood Borough	2.05	1.64	2.07	2.49	1.27	0.00	0.50	10.03
Brentwood Borough Total	**33.11**	**17.55**	**10.60**	**15.69**	**9.11**	**0.00**	**8.08**	**94.14**
Basildon	0.79	1.03	0.05	0.00	0.24	0.00	n/a	2.12
Billericay	0.84	3.33	0.23	0.38	0.07	0.00	n/a	4.85
Romford/Harold Hill	0.51	0.36	0.25	0.65	0.00	0.00	n/a	1.78
Chelmsford	0.98	0.83	3.12	0.59	0.00	0.00	n/a	5.52
intu Lakeside	1.40	0.17	0.14	0.11	0.21	0.00	n/a	2.02
Other	9.00	4.46	3.33	3.69	7.79	0.00	n/a	28.28
Other Sub-Total	**13.52**	**10.17**	**7.13**	**5.43**	**8.31**	**0.00**	**n/a**	**44.56**
TOTAL	**46.64**	**27.72**	**17.73**	**21.11**	**17.42**	**0.00**	n/a	**138.70**

Source: Table 3 and 4

Table 7: Future food and beverage market shares (%)

Destination	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Dunton Hills/ West Horndon	% Inflow
Brentwood Town Centre	56.7%	39.4%	20.3%	60.6%	34.0%	20.0%	10.0%
Shenfield District Centre	9.2%	14.8%	4.6%	0.8%	0.9%	0.0%	5.0%
Ingatestone District Centre	0.3%	2.8%	23.2%	1.1%	0.9%	0.0%	5.0%
Ingrave/Herongate/W.Horndon/Dunton Hills	0.4%	0.4%	0.0%	0.0%	15.0%	35.0%	5.0%
Other Brentwood Borough	4.4%	5.9%	11.7%	11.8%	7.0%	0.0%	5.0%
Brentwood Borough Total	**71.0%**	**63.3%**	**59.8%**	**74.3%**	**57.8%**	**55.0%**	
Basildon	1.7%	3.7%	0.3%	0.0%	1.2%	25.0%	n/a
Billericay	1.8%	12.0%	1.3%	1.8%	0.3%	0.0%	n/a
Romford	1.1%	1.3%	1.4%	3.1%	0.0%	0.0%	n/a
Chelmsford	2.1%	3.0%	17.6%	2.8%	0.0%	0.0%	n/a
intu Lakeside	3.0%	0.6%	0.8%	0.5%	1.0%	0.0%	n/a
Other	19.3%	16.1%	18.8%	17.5%	39.7%	20.0%	n/a
Other Sub-Total	**29.0%**	**36.7%**	**40.2%**	**25.7%**	**42.2%**	**45.0%**	n/a
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	n/a

Source: NEMS Household Survey June 2014 and Lichfields' adjsutments to reflect development at West Hordon and Dunton Hills.

Table 8: Future 2023 food and beverage expenditure (£m)

Destination	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Dunton Hills/ West Horndon	% Inflow	Total
Expenditure 2023	**49.09**	**29.26**	**18.56**	**21.92**	**18.81**	**0.55**		**138.19**
Brentwood Town Centre	27.83	11.53	3.77	13.29	6.40	0.11	6.99	69.91
Shenfield District Centre	4.52	4.33	0.85	0.18	0.17	0.00	0.53	10.57
Ingatestone District Centre	0.15	0.82	4.31	0.24	0.17	0.00	0.30	5.98
Ingrave/Herongate/W.Horndon/Dunton Hills	0.20	0.12	0.00	0.00	2.82	0.19	0.18	3.50
Other Brentwood Borough	2.16	1.73	2.17	2.59	1.32	0.00	0.52	10.49
Brentwood Borough Total	**34.85**	**18.52**	**11.10**	**16.29**	**10.87**	**0.30**	**8.52**	**100.46**
Basildon	0.83	1.08	0.06	0.00	0.23	0.14	n/a	2.33
Billericay	0.88	3.51	0.24	0.39	0.06	0.00	n/a	5.09
Romford/Harold Hill	0.54	0.38	0.26	0.68	0.00	0.00	n/a	1.86
Chelmsford	1.03	0.88	3.27	0.61	0.00	0.00	n/a	5.79
intu Lakeside	1.47	0.18	0.15	0.11	0.19	0.00	n/a	2.09
Other	9.47	4.71	3.49	3.84	7.47	0.11	n/a	29.09
Other Sub-Total	**14.24**	**10.74**	**7.46**	**5.63**	**7.94**	**0.25**	**n/a**	**46.25**
TOTAL	**49.09**	**29.26**	**18.56**	**21.92**	**18.81**	**0.55**	n/a	**146.71**

Source: Table 3 and 7

Table 9: Future 2028 food and beverage expenditure (£m)

Destination	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Dunton Hills/ West Horndon	% Inflow	Total
Expenditure 2028	**52.89**	**31.61**	**19.86**	**23.28**	**19.94**	**4.17**		**151.76**
Brentwood Town Centre	29.99	12.45	4.03	14.11	6.78	0.83	7.58	75.78
Shenfield District Centre	4.87	4.68	0.91	0.19	0.18	0.00	0.57	11.39
Ingatestone District Centre	0.16	0.89	4.61	0.26	0.18	0.00	0.32	6.41
Ingrave/Herongate/W.Horndon/Dunton Hills	0.21	0.13	0.00	0.00	2.99	1.46	0.25	5.04
Other Brentwood Borough	2.33	1.86	2.32	2.75	1.40	0.00	0.56	11.22
Brentwood Borough Total	**37.55**	**20.01**	**11.88**	**17.30**	**11.53**	**2.29**	**9.28**	**109.84**
Basildon	0.90	1.17	0.06	0.00	0.24	1.04	n/a	3.41
Billericay	0.95	3.79	0.26	0.42	0.06	0.00	n/a	5.48
Romford/Harold Hill	0.58	0.41	0.28	0.72	0.00	0.00	n/a	1.99
Chelmsford	1.11	0.95	3.50	0.65	0.00	0.00	n/a	6.21
intu Lakeside	1.59	0.19	0.16	0.12	0.20	0.00	n/a	2.25
Other	10.21	5.09	3.73	4.07	7.92	0.83	n/a	31.86
Other Sub-Total	**15.34**	**11.60**	**7.99**	**5.98**	**8.42**	**1.88**	**n/a**	**51.20**
TOTAL	**52.89**	**31.61**	**19.86**	**23.28**	**19.94**	**4.17**	n/a	**161.04**

Source: Table 3 and 7

Table 10: Future 2033 food and beverage expenditure (£m)

Destination	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Dunton Hills/ West Horndon	% Inflow	Total
Expenditure 2033	**56.37**	**33.91**	**21.22**	**24.68**	**21.38**	**7.32**		**164.88**
Brentwood Town Centre	31.96	13.36	4.31	14.95	7.27	1.46	8.15	81.46
Shenfield District Centre	5.19	5.02	0.98	0.20	0.19	0.00	0.61	12.18
Ingatestone District Centre	0.17	0.95	4.92	0.27	0.19	0.00	0.34	6.85
Ingrave/Herongate/W.Horndon/Dunton Hills	0.23	0.14	0.00	0.00	3.21	2.56	0.32	6.45
Other Brentwood Borough	2.48	2.00	2.48	2.91	1.50	0.00	0.60	11.97
Brentwood Borough Total	**40.02**	**21.46**	**12.69**	**18.33**	**12.36**	**4.03**	**10.02**	**118.92**
Basildon	0.96	1.25	0.06	0.00	0.26	1.83	n/a	4.36
Billericay	1.01	4.07	0.28	0.44	0.06	0.00	n/a	5.87
Romford/Harold Hill	0.62	0.44	0.30	0.76	0.00	0.00	n/a	2.12
Chelmsford	1.18	1.02	3.74	0.69	0.00	0.00	n/a	6.63
intu Lakeside	1.69	0.20	0.17	0.12	0.21	0.00	n/a	2.40
Other	10.88	5.46	3.99	4.32	8.49	1.46	n/a	34.60
Other Sub-Total	**16.35**	**12.44**	**8.53**	**6.34**	**9.02**	**3.29**	**n/a**	**55.98**
TOTAL	**56.37**	**33.91**	**21.22**	**24.68**	**21.38**	**7.32**	n/a	**174.90**

Source: Table 3 and 7

Table 11: Summary of food and drink expenditure 2016 to 2033

	2016	2020	2023	2028	2033
Available expenditure in Brentwood Borough (£m)					
Brentwood	63.95	67.51	69.91	75.78	81.46
Shenfield District Centre	9.55	10.05	10.57	11.39	12.18
Ingatestone District Centre	5.30	5.72	5.98	6.41	6.85
Ingrave/Herongate/W.Horndon/Dunton Hills	0.76	0.83	3.50	5.04	6.45
Other Brentwood Borough	9.41	10.03	10.49	11.22	11.97
Total	**88.98**	**94.14**	**100.46**	**109.84**	**118.92**
Turnover of existing facilities (£m)					
Brentwood	63.95	66.55	68.57	72.06	75.74
Shenfield District Centre	9.55	9.94	10.24	10.76	11.31
Ingatestone District Centre	5.30	5.52	5.68	5.97	6.28
Ingrave/Herongate/W.Horndon/Dunton Hills	0.76	0.79	0.82	0.86	0.90
Other Brentwood Borough	9.41	9.80	10.09	10.61	11.15
Total	**88.98**	**92.59**	**95.40**	**100.26**	**105.38**
Surplus expenditure (£m)					
Brentwood	0.00	0.96	1.35	3.71	5.73
Shenfield District Centre	0.00	0.12	0.33	0.63	0.87
Ingatestone District Centre	0.00	0.21	0.30	0.44	0.57
Ingrave/Herongate/W.Horndon/Dunton Hills	0.00	0.03	2.68	4.18	5.55
Other Brentwood Borough	0.00	0.23	0.39	0.61	0.82
Total	**0.00**	**1.55**	**5.06**	**9.58**	**13.54**

Source: Tables 5 to 10

Table 12: Food and beverage floorspace capacity 2016 to 2033

	2016	2020	2023	2028	2033
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,203	£5,361	£5,634	£5,922
Floorspace Requirement (sq.m gross)					
Brentwood	n/a	185	251	659	967
Shenfield District Centre	n/a	22	62	112	147
Ingatestone District Centre	n/a	40	56	77	96
Ingrave/Herongate/W.Horndon/Dunton Hills	n/a	7	501	742	938
Other Brentwood Borough	n/a	44	73	109	139
Total	**n/a**	**298**	**943**	**1,700**	**2,286**

Source: Table 11

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