Brentwood Borough Retail & Commercial Leisure Study

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Executive Summary

Chase and Partners were instructed by Brentwood Borough Council to undertake a retail and indoor commercial leisure study to assess current retail and commercial leisure provision, capacity, future needs and demand as well as market conditions across the Borough. The study covers retail and commercial leisure growth until 2031 in line with the timescale for the Council's emerging local development plan. The primary aim is to provide the Council with robust evidence to guide the creation of retail and commercial leisure planning policies and proposals in the future.

By way of introduction the study sets out the national, strategic and local planning policy framework within which the assessment has been prepared. It then provides a brief overview of wider retail and leisure trends relevant to the future of the Borough.

As part of the assessment Chase & Partners commissioned a household survey. Those surveyed were within an agreed catchment area where Brentwood town centre and the Borough's other main retail centres exert an influence over existing shopping behaviour. From this it is possible to identify the relationship between the town and other nearby retail centres – including Billericay, Basildon, Chelmsford, Romford and the shopping centres at Lakeside and Bluewater – particularly for comparison goods shopping.

In accordance with prevailing planning guidance and requirements of the Brief, Chase & Partners undertook a comprehensive 'health check' assessment of the Borough's four main retail centres of Brentwood, Ingatestone, Shenfield and Warley Hill as well as village and local centres, individual parades and shops. This revealed that the main centres have been reasonably resilient to changes in retail trends and the effects of the current economic downturn. On the face of the evidence they appear to be performing well. Similarly the analysis of village and local centres, individual parades and shops has generally revealed that the majority have adapted reasonably well to changing consumer trends and continue to provide an important local shopping and service function.

A quantitative need assessment has been undertaken in order to establish the potential floorspace requirements for the Borough of Brentwood for the entire local development plan period. The findings point to a reasonable level of need for both convenience and comparison goods floorspace over the plan period, some 4,491 sq m of additional convenience floorspace by 2031. Particularly though for comparison goods floorspace with a projected need for some 5,963 sq m of comparison goods floorspace by 2031 within Brentwood alone. Although current economic uncertainty will undoubtedly have an effect on consumer expenditure and will constrain the need for development in the town centre in the short term, the potential for new convenience and comparison floorspace over the medium/long term is clear. It should be noted here however that much of this need will be met through the completion of the forthcoming William Hunter Way development within Brentwood town centre.

Continued careful management of retailing within the Borough should aim to build on what are strong foundations at present. Brentwood town centre must continue to play to its strengths offering a pleasant environment within which to spend time and shop, it also benefits from an interesting retail offer and a thriving cafe, restaurant and bar culture. Increasing the diversity of the retail mix and the leisure and entertainment offer within the centre would help it to continue to compete favourably with rival town and shopping centres nearby.

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APPENDICES

PLANS

1. Introduction

1.1 Chase & Partners were instructed by Brentwood Borough Council in September 2010 to undertake a retail and indoor commercial leisure study to assess current retail and commercial leisure provision, capacity, future needs and demand and market conditions across the Borough.

1.2 The project brief required Chase & Partners to:

(i) Identify current retail and commercial leisure provision in both urban and rural areas across the Borough, identifying strengths and weaknesses and comparing with neighbouring authorities, national and regional data;

(ii) Assess the level of retail expenditure in the Borough (and Brentwood town centre catchment area) and levels of retention/outflow for both convenience and comparison shopping; and future projections to 2031;

(iii) Assess the need for different types of retail and commercial leisure floorspace using quantitative and qualitative approaches, projecting demand and need;

(iv) Identify key drivers for change in Brentwood's retail and commercial leisure sectors;

(v) Identify areas of the Borough where there is or in future may be a mismatch between retail and commercial leisure provision and need/demand and where capacity exists for retail and commercial leisure growth or rationalisation;

(vi) Assess the level of retail diversity within the town centre and other settlements, looking at current and types of shopping provision and recommend improvements;

(vii) Assess the likely impact of both planned and potential town centre shopping expansion in neighbouring areas;

(viii) Consider retail and commercial leisure data in the light of demographic information, setting out current trends and potential future changes;

(ix) Take account of existing and future shopping trends given the need for more sustainable travel patterns and lifestyles, e.g. internet shopping; and

(x) Provide robust information on retail data such as trends in consumer spending, shopping catchment areas and retail floorspace, in order to support the implementation of retail planning policies and guidance, determination of planning applications, and the Council's response to future appeals.

1.3 In order to fulfil the requirements of the brief the Study has been divided into nine further sections:

- **Section 2** provides an overview of relevant national, strategic and local planning policy and sets the context within which this study has been prepared;
- **Section 3** provides an overview of wider retail trends which are relevant to Brentwood Borough and its main centres;
- **Section 4** provides an overview of current shopping patterns within the study area based on a household survey undertaken (on behalf of Chase & Partners) by Research & Marketing in October 2010. It pays particular regard to existing shopping behaviour for both convenience and comparison goods, and expenditure patterns throughout the study area;
- **Section 5** provides an assessment of the current vitality and viability of the main shopping centres in the Borough – Brentwood town centre, Warley Hill (Brentwood station area), Shenfield and Ingatestone;
- **Section 6** provides an assessment of the various local centres, parades and individual shops located throughout the Borough;
- **Section 7** provides a full quantitative retail need assessment setting out potential floorspace requirements for Brentwood, Shenfield and Ingatestone to 2031;
- **Section 8** sets out our recommendations for future policy within the Borough; and

- **Section 9** summarises our conclusions.

2. Planning Policy Overview

National Planning Policy Guidance

2.1 Relevant national guidance is currently contained within Planning Policy Statements 1, 4 and 12 and Planning Policy Guidance Note 13.

PPS1: Planning Policy Statement, Delivering Sustainable Development

2.2 PPS1 was published in 2005 and, together with the Supplement issued in December 2007 seeks to shape the way in which we live and work in ways which are more sustainable. It emphasises meeting the needs of future generations as well as our own – paying particular regard to the need to reduce carbon emissions and ensure future development is more resilient to climate change.

2.3 With regard to delivering sustainable development, PPS1 highlights specific objectives that should be achieved, namely:

- promoting urban and rural regeneration;
- promoting regional, sub-regional and local economies;
- promoting communities which are inclusive, healthy, crime free;
- bringing forward sufficient land of suitable quality in the right locations to meet housing and retail development;
- promote the more efficient use of land; and
- reducing, where possible, the need to travel.

PPS4: Planning for Sustainable Economic Growth

2.4 Planning Policy Statement 4: 'Planning for Sustainable Economic Growth' (PPS4) was published in December 2009, replaced Planning Policy Guidance Note 6 'Planning for Town Centres'; PPG4 'Industrial, commercial development and small firms'; PPG5 'Simplified Planning Zones'; and economic development elements of PPS7, 'Sustainable Development in Rural Areas'. PPS4 consolidated national planning policy on economic development[1] in urban and rural areas, and town centres, into one Policy Statement. Accompanying Practice Guidance on Need, Impact and the Sequential Approach[2] also needs to be taken into account when preparing LDFs and considering individual planning applications.

2.5 PPS4's overarching objective is "sustainable economic growth"; defined as:

> *"Growth that can be sustained as is within environmental limits, but also enhances environmental and social welfare and avoids greater extremes in future economic cycles."*

2.6 In order to achieve such growth a key objective for planning is to promote the vitality and viability of town and other centres as important places for communities. In accordance with long-standing policy objectives, PPS4 advocates focusing new economic growth and development in existing centres that should aim to offer a wide range of services to communities in an attractive, safe environment. Consideration should be given to remedying deficiencies in provision in areas with poor access to facilities.

2.7 PPS4 seeks to promote competition between retailers and enhanced consumer choice through the provision of innovative, efficient shopping, leisure, tourism and local services in town centres, in order to ensure there is genuine choice to meet the needs of the entire community. In doing this Government wishes to see the historic, archaeological and architectural heritage of centres to be conserved and, where appropriate, enhanced to provide a sense of place and a focus for the community and civic activity.

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1 For the purposes of PPS4, 'economic development' includes main town centre uses (including retail, leisure and entertainment, arts culture and tourism development) and development within the B Use Class of the Town & Country Planning (Use Classes) Order 1987 (as amended) – see PPS4, paragraph 4.

2 Planning for Town Centres: Practice Guidance on need, impact and the sequential approach Dept of Communities and Local Government, December 2009

2.8 **Policy EC1** in PPS4, highlights the crucial importance of using appropriate evidence in all economic planning. It highlights the importance of having an up-to-date, sound evidence base for development planning and for retail planning to:

- Be informed by regional assessments;
- Assess the detailed need for land or floorspace for all main town centre uses over the plan period;
- Identify any deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day needs;
- Assess the capacity of existing centres to accommodate new town centre development - taking account of the role of centres in the retail hierarchy[3] and identify centres in decline where change needs to be managed.
- **Policy EC1.4** advises Authorities undertaking assessments of the need for retail and leisure development. It requires planning authorities to undertake an assessment of the potential need for these 'town centre' uses as part of the plan-making process.

2.9 Having emphasised the importance of a robust evidence base underpinning forward planning, PPS4 sets out a series of policies for plan-making. **Policies EC2 – EC8** set out the approach Local Planning Authorities should adopt when preparing Local Development Documents. **Policies EC3, EC4** and **EC5** are of particular relevance when considering policies for retail development and town centre uses.

2.10 **Policy EC3** sets out the approach Local Planning Authorities should take when planning for town centres. It differentiates between the role of regional or sub-regional assessments dealing with strategic issues, and more locally based assessments undertaken – as in this instance – to inform the LDP process. **Policy EC3** states:

> *Regional planning bodies and local planning authorities should, as part of their economic vision for their area, set out a strategy for the management and growth of centres over the plan period. Regional planning bodies should*

focus on higher level centres (those of more than local importance) in the region to provide a strategic framework for planning for centres at the local level. As part of their strategy regional planning bodies and local planning authorities should:

a. *set flexible policies for their centres which are able to respond to changing economic circumstances and encourage, where appropriate, high-density development accessible by public transport, walking and cycling*

b. *Define a network (the pattern of provision of centres) and hierarchy (the role and relationship of centres in the network) of centres that is resilient to anticipated future economic changes, to meet the needs of their catchments having:*

   i. *Made choices about which centres will accommodate any identified need for growth in town centre uses, considering their expansion where necessary, taking into account the need to avoid an over concentration of growth in centres. Identified deficiencies in the network of centres should be addressed by promoting centres to function at a higher level in the hierarchy or designating new centres where necessary, giving priority to deprived areas which are experiencing significant levels of 'multiple deprivation' where there is a need for better access to services, facilities and employment by socially excluded groups*

   ii. *Ensured any extensions to centres are carefully integrated with the existing centre in terms of design including the need to allow easy pedestrian access*

   iii. *Where existing centres are in decline, considered the scope for consolidating and strengthening these centres by seeking to focus a wider range of services there, promoting the diversification of uses and improving the environment*

   iv. *Where reversing decline in existing centres is not possible, considered reclassifying the centre at a lower level within the hierarchy of centres, reflecting this revised status in the policies applied to the area. This may*

[3] As listed within Annex B of PPS4: Planning for Sustainable Economic Growth – City Centres, Town Centres, District Centres & Local Centres

include allowing retail units to change to other uses, whilst aiming, wherever possible, to retain opportunities for vital local services

v. *ensured that the need for any new, expanded or redeveloped out-of-centre regional or sub-regional shopping centre or any significant change in the role and function of centres is considered through the regional spatial strategy*

c. *at the local level, define the extent of the centre and the primary shopping area in their Adopted Proposals Map having considered distinguishing between realistically defined primary and secondary frontages in designated centres and set policies that make clear which uses will be permitted in such locations*

d. *at the local level, consider setting floorspace thresholds for the scale of edge-of centre and out-of-centre development which should be subject to an impact assessment under (EC16.1) and specify the geographic areas these thresholds will apply to*

e. *define any locally important impacts on centres which should be tested (see policy EC16.1.f)*

f. *at the local level, encourage residential or office development above ground floor retail, leisure or other facilities within centres, ensuring that housing in out-of-centre mixed-use developments is not, in itself, used as a reason to justify additional floorspace for main town centre uses in such locations*

g. *at the local level, identify sites or buildings within existing centres suitable for development, conversion or change of use*

h. *at the local level, use tools such as local development orders, area action plans, compulsory purchase orders and town centre strategies to address the transport, land assembly, crime prevention, planning and design issues associated with the growth and management of their centres*

2.11 **Policy EC4** outlines Local Authorities' responsibilities to promote consumer choice and competition in town centre development; it states:

EC4.1 *Local planning authorities should proactively plan to promote competitive town centre environments and provide consumer choice by:*

a. supporting a diverse range of uses which appeal to a wide range of age and social groups, ensuring that these are distributed throughout the centre

b. planning for a strong retail mix so that the range and quality of the comparison and convenience retail offer meets the requirements of the local catchment area, recognising that smaller shops can significantly enhance the character and vibrancy of a centre

c. supporting shops, services and other important small scale economic uses (including post offices, petrol stations, village halls and public houses) in local centres and villages

d. identifying sites in the centre, or failing that on the edge of the centre, capable of accommodating larger format developments where a need for such development has been identified

e. retaining and enhancing existing markets and, where appropriate, re-introducing or creating new ones, ensuring that markets remain attractive and competitive by investing in their improvement

f. taking measures to conserve and, where appropriate, enhance the established character and diversity of their town centres

EC4.2 *Local planning authorities should manage the evening and night-time economy in centres, taking account of and complementing the local authority's Statement of Licensing Policy and the promotion of the licensing objectives under the Licensing Act 2003. Policies should:*

a. encourage a diverse range of complementary evening and night-time uses which appeal to a wide range of age and social groups, making provision, where appropriate, for leisure, cultural and tourism activities such as cinemas, theatres, restaurants, public houses, bars, nightclubs and cafes, and *b. set out the number and scale of leisure developments they wish to encourage taking account of their potential impact, including the cumulative impact, on the character and function of the centre, anti-social behaviour and crime, including considering security issues raised by crowded places, and the amenities of nearby residents*

2.12 Whilst there is a clear obligation on authorities to promote competition and consumer choice, PPS4 does not include a competition test[4] for future supermarket development. Proposals for such a test arose from the Competition Commission's Investigation of the Groceries Market[5] in 2006-07. Following Tesco's successful appeal to the Competition Appeals Tribunal against the inclusion of this recommendation[6], the Commission issued a new decision recommending the introduction a 'competition test' into the planning system in October 2009. The Government has yet to formally respond to this recommendation.

2.13 A key element of any town centre strategy, is the identification of sites to accommodate new development – where needed. This might include opportunities to expand existing centres as well as opportunities to redevelop, grow and/or replace existing facilities. **Policy EC5** sets out the process that should be adopted towards site selection and land assembly for town centre uses.

EC5.1 *Local planning authorities should identify an appropriate range of sites to accommodate the identified need, ensuring that sites are capable of accommodating a range of business models in terms of scale, format, car parking provision and scope for disaggregation. An apparent lack of sites of the right size and in the right location should not be a reason for local planning authorities to avoid planning to meet the identified need for development. Local planning authorities should:*

a. base their approach on the identified need for development

b. identify the appropriate scale of development, ensuring that the scale of the sites identified and the level of travel they generate, are in keeping

4 This would require local authorities to assess planning applications for new grocery floorspace over a certain size, say, 1,000 square metres for their impacts on competition, in consultation with the Office of Fair Trading.

5 Competition Commission Investigation of the Groceries Market – Provisional Decision on Planning Remedies – Feb 2008

with the role and function of the centre within the hierarchy of centres and the catchment served apply the sequential approach to site selection (see policy EC5.2)

c. *assess the impact of sites on existing centres (see policy EC5.4).*

d. *consider the degree to which other considerations such as any physical regeneration benefits of developing on previously-developed sites, employment opportunities, increased investment in an area or social inclusion, may be material to the choice of appropriate locations for development.*

EC5.2 *Sites for main town centre uses should be identified through a sequential approach to site selection. Under the sequential approach, local planning authorities should identify sites that are suitable, available and viable in the following order:*

a. *Locations in appropriate existing centres where sites or buildings for conversion. are, or are likely to become, available within the plan period*

b. *Edge-of-centre locations, with preference given to sites that are or will be well connected to the centre*

c. *out-of-centre sites, with preference given to sites which are or will be well served by a choice of means of transport and which are closest to the centre and have a higher likelihood of forming links with the centre*

EC5.3 *Sites that best serve the needs of deprived areas should be given preference when considered against alternative sites with similar location characteristics.*

EC5.4 *In assessing the impact of proposed locations for development under EC5.1.d, local planning authorities should:*

a. *take into account the impact considerations set out in Policy EC16, particularly for developments over 2.500 sqm or any locally set threshold under EC3.1.e ensuring that any proposed edge of centre or out of centre*

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[6] Competition Appeal Tribunal Tesco plc vs Competition Commission–Judgement March 2009

sites would not have an unacceptable impact on centres within the catchment of the potential development

b. ensure that proposed sites in a centre, which would substantially increase the attraction of that centre and could have an impact on other centres, are assessed for their impact on those other centres, and

c. ensure that the level of detail of any assessment of impacts is proportionate to the scale, nature and detail of the proposed development

EC5.5 *Having identified sites for development, local planning authorities should allocate sufficient sites in development plan documents to meet at least the first five years identified need. Where appropriate, local development frameworks should set out policies for the phasing and release of allocated sites to ensure that those sites in preferred locations within centres are developed ahead of less central locations.*

EC5.6 *Local authorities should make full use of planning tools to facilitate development, including compulsory purchase orders and other planning tools including area action plans, simplified planning zones and local development orders.*

2.14 PPS4 provides the basic framework for both the production of the retail and leisure assessment and how this should inform LDP policies for town centre uses.

PPS12: Local Spatial Planning

2.15 Planning Policy Statement 12: Local Spatial Planning, June 2008, along with the accompanying 'Plan-Making Manual' sets out the key ingredients of local spatial plans and national policies on how they should be prepared.

2.16 The PPS reiterates the continued importance of the Core Strategy presenting an overall vision and spatial strategy informed by an analysis of the characteristics of the area and key issues and challenges facing it. The Core Strategy needs to be founded on a "robust and credible evidence base" and the most appropriate strategy when assessed against "reasonable alternatives". With regard to retail matters, this assessment provides an important contribution towards this evidence base and the Council's consideration of alternatives as part of its Core Strategy.

2.17 The PPS places a strong emphasis on deliverability, requiring the LDF Core Strategy to contain a clear strategy to deliver its stated objectives by indicating, for example, how much development is envisaged, where it is expected to take place, when, and by what means it will be delivered.

PPG13: Transport, March 2001

2.18 PPG13 (March 2001), recognises that land use planning has a key role in delivering a national integrated Transport Strategy. The guidance notes that land use planning can help to reduce the need to travel and the length of journey times and make it safe and easier for people to access jobs, shopping, leisure facilities by means other than the private car.

Draft National Planning Policy Statement, July 2011

2.19 DCLG published the draft National Planning Policy Framework (NPPF) for consultation on 25 July 2011. This is a key part of current reforms of the planning system aiming to make policy less complex, more accessible and promote sustainable growth. Until the document is adopted it has some weight in the decision making process although very little.

2.20 Sustainable development lies at the heart of the draft Framework which it defines as:

- Planning for prosperity (the economic role)
- Planning for people (the social role)
- Planning for places (the environmental role)

2.21 A set of core planning principles have been developed to underpin both plan making and development management. These are:

- Planning should be plan-led, "succinct" Local Plans setting out long-term local visions;

- Planning should act as a pro-active driver of development. This is borne out by the proposed presumption in favour of sustainable development;

- Local circumstances and market signals should be taken into account and plans should include a strategy for allocating sufficient land that is suitable for development;

- When considering future use of land, environmental quality of potential quality should be taken into account, regardless of previous or existing use;

- Environmental and heritage assets must be protected and enhanced and, where practical, allocation of land for development should be to land with less environmental value;

- There should be more effective use of land, mixed use development should be promoted and multiple benefits from land use in both urban and rural areas should be encouraged;

- Reuse of existing resources should be enabled, conversion of existing buildings and use of renewable resources should be encouraged rather than restricted;

- Patterns of growth should be actively managed to make the fullest use of public transport, walking and cycling; significant development should be focused in locations that are or can be made sustainable;

- Local strategies to improve health and wellbeing should be taken into account; and

- There should always be a good standard of amenity for existing and future occupants.

2.22 The draft NPPF requires each local authority to produce a 'Local Plan' which should be "aspirational but realistic" and should include strategic priorities to deliver:

- housing and economic development requirements;

- the provision of retail, leisure and other commercial development;

- the provision of infrastructure for transport, minerals, waste, energy, telecoms, water supply and water quality;
- the provision of health, security, community infrastructure and other local facilities; and
- climate change mitigation and adoption, protection and enhancement of the natural and historic environment, including landscape and, where relevant, coastal management.

2.23 In addition to Local Plans, the NPPF also allows the formation of 'Neighbourhood Plans' to give communities direct power to plan their local areas. They are designed to give local people more control over local development although they must still conform to the strategic priorities set out in the Local Plan. These Plans should:

- develop a shared vision for the neighbourhood;
- set planning policies for the development and use of land; and
- give planning permission through 'Neighbourhood Development Orders' and 'Community Rights to Build Orders'.

2.24 In terms of town centres, the NPPF acknowledges that they should be recognised as the heart of their communities and recommends several measures that define town centres and help them to remain resilient to economic change.

2.25 Furthermore, local authorities will be expected to apply a sequential approach to retail and leisure applications that are not in an existing town centre. Town centres will still be the preferred location, followed by edge of centre and then, only if no suitable sites are available, out of town sites.

Strategic Planning Policy

East of England Plan

2.26 The Regional Spatial Strategy (The East of England Plan) was published on 12 May 2008 by the Government Office for the East of England. It superseded Regional Planning Guidance for East Anglia previously contained in RPG6 together with relevant sections of the former Guidance for the South East and Thames Gateway (RPGs 9, 9A & 3B/9B).

2.27 On 6 July 2010 the Communities' Minister announced his intention to revoke all regional strategies. This announcement was challenged by Cala Homes and, in November 2010, the High Court ruled that the Communities' Secretary Eric Pickles acted unlawfully. In February 2011 the Secretary of State successfully argued that the proposed scrapping of Regional Strategies is a "material consideration which can be considered by local planning authorities and planning inspectors when making decisions." In a judgment delivered by the Court of Appeal on 27th May 2011, Cala Homes lost their appeal against the dismissal of their application for judicial review of the Secretary of State's intention to treat the forthcoming abolition of Regional Strategies as a material consideration in the determination of current applications and appeals.

2.28 At the time of writing the formal status of the East of England Plan is uncertain – although the Government's intention to abolish RSSs is clear. To address cross-boundary issues, there will be a new duty 'to co-operate' placed on local planning authorities. An understanding of the regional and sub-regional context remains important, however, therefore the following paragraphs have been included for completeness.

2.29 **Policy SS3** of the RSS lists the key centres for development and change in the Region. These include Chelmsford, Ipswich, Watford, Cambridge, Harlow and Stevenage but does not include any centre in Brentwood Borough. **Policy SS4** of the RSS states that Local Development Documents will define the approach to development in towns other than these key centres. **Policy SS6** requires Local Development Documents to *inter alia*:

- Define the role (or redefine it where necessary) of each town centre and a strategy to manage change, promote a healthy mix of uses, build upon positive elements of its distinctive character, and support the development and consolidation of the local cultural heritage;

- ensure that land is allocated, or can be made available, to meet the range of identified needs in these town centres; and

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

2.30 **Policy E5** sets out the regional hierarchy of towns and cities with regard to economic development, including new retail development, two tiers are defined:

- Regional Centres – including Cambridge, Chelmsford, Ipswich, Norwich, Peterborough and Watford; and

- Major Town Centres - including Harlow, Hemel Hempstead, Luton, St Albans, Stevenage and Welwyn Garden City.

No town or centre in Brentwood Borough is identified as part of the regional hierarchy; rather these are part of a network of local centres, as the policy states:

> *"Below the level of the centres of regional strategic importance local development documents will identify a network of more local town centres, district centres, neighbourhood centres and village centres"*

2.31 In keeping with requirements of **Policy SS4** it is left to Local Development Frameworks to set the local hierarchy and approach towards future economic development to be taken in these smaller settlements.

Local Planning Policy

2.32 Brentwood Replacement Local Plan was formally adopted by the Council on 25 August 2005. Under the Planning and Compulsory Purchase Act 2004, policies in the plan were 'saved' for a period up to three years from adoption (in Brentwood's case to 24 August 2008) or until superseded by a new local development plan.

2.33 In May 2008 the Council applied to the Secretary of State to 'save' all but 24 of the Adopted Replacement Local Plan policies beyond the automatic three year period. The Secretary of State's Direction, received 24 July 2008, set out the full list of "saved" policies, that is, policies which remain in force pending the completion of a new Local Development Plan. Relevant policies are set out below.

2.34 **Policy S1** sets out the Council's overall approach towards major new retail developments across the Borough – it states:

MAJOR RETAIL DEVELOPMENT* WILL ONLY BE PERMITTED WITHIN BRENTWOOD TOWN CENTRE AND THE BOROUGHS OTHER DISTRICT CENTRES WHERE IT IS WITHIN AN AREA ALLOCATED FOR SHOPPING PURPOSES OR WITHIN THE CONTEXT OF POLICY TC10. OTHER RETAIL DEVELOPMENT WILL BE PERMITTED IF IT IS OF A SIZE APPROPRIATE TO THE SCALE AND CHARACTER OF THE CENTRE OR AREA IN WHICH IT IS TO BE LOCATED AND SATISFIES THE SEQUENTIAL APPROACH IN PPG6. ALL RETAIL PROPOSALS SHOULD SATISFY THE FOLLOWING:

i) THE PROPOSED DEVELOPMENT WILL NOT HAVE AN UNACCEPTABLE DETRIMENTAL IMPACT ON THE VITALITY AND VIABILITY OF BRENTWOOD TOWN CENTRE OR ANY OTHER LOCAL DISTRICT SHOPPING CENTRE AS A WHOLE

ii) THE PROPOSED DEVELOPMENT IS EASILY ACCESSIBLE BY PUBLIC TRANSPORT, FOOT AND CYCLE

* Proposals with a floorspace of 2,500 sqm or more

2.35 **Policy S3** deals with retail facilities provided at petrol filling stations – it states:

RETAIL FLOOR SPACE ASSOCIATED WITH PETROL FILLING STATIONS WILL ONLY BE PERMITTED WHERE THE PROPOSED DEVELOPMENT WILL NOT HAVE AN UNACCEPTABLE DETRIMENTAL IMPACT ON THE VIABILITY OF AN EXISTING SHOPPING CENTRE, LOCAL SHOPPING PARADE OR A MORE SUSTAINABLY LOCATED SHOPPING FACILITY

WHERE RETAIL PROPOSALS ARE NOT CONSIDERED ANCILLARY TO THE MAIN USE AS A PETROL FILLING STATION, THE NEED FOR THE RETAIL ELEMENT AND A SEQUENTIAL APPROACH WILL BE APPLIED

2.36 In light of pressures to convert existing retail promises into non-retail uses such as financial and professional services (e.g. banks, estate agents), restaurants and cafes, drinking establishments and hot food takeaways[7] the Council has adopted **Policy S4** which deals with such uses within local shopping centres and parades in the Borough – it states:

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[7] As defined in Use Classes A3-5 in the Town and Country Planning Use Classes Order 1987 (as amended)

WITHIN THE GROUND FLOOR OF PREMISES IN LOCAL SHOPPING CENTRES AND PARADES (OTHER THAN THE TOWN CENTRE) A FURTHER A2, A3, A4 OR A5 USE WILL BE PERMITTED ONLY WHERE:

i) IT WOULD RESULT IN NO MORE THAN TWO ADJACENT NON-RETAIL USES, AND

ii) IN THE CASE OF SHOPPING PARADES IT WOULD RESULT IN NO MORE THAN 40% OF UNITS WITHIN ANY PARADE BEING USED FOR NON-RETAIL USES OR, IN THE CASE OF THE FOLLOWING BLOCKS OF SHOPS, IT WOULD RESULT IN NO MORE THAN 40% OF UNITS WITHIN ANY BLOCK BEING USED FOR NON-RETAIL USES:

BRENTWOOD STATION AREA

a) 78-92 AND 93-99 KINGS ROAD

b) 104-130 AND 137-167 KINGS ROAD

c) 2-26 AND 1-33 WARLEY HILL, 2-10 VICTORIA ROAD AND 1-3 CRESCENT ROAD

SHENFIELD
d) 138-250 AND 65-105 HUTTON ROAD

INGATESTONE
e) 3-57 HIGH STREET (INCLUDING 1-5 SPREAD EAGLE PLACE) AND 26-108 HIGH STREET (INCLUDING 1-7 MARKET PLACE)

f) 118A-122 AND THE CROWN - THE LIBRARY, HIGH STREET

WHERE A3, A4 OR A5 USES MEET THE ABOVE CRITERIA, PLANNING PERMISSION WILL ONLY BE GRANTED WHERE THE IMPOSITION OF CONDITIONS REGARDING, INTER ALIA, HOURS OF OPENING, CONTROL OF NOISES AND SMELLS CAN PROTECT THE AMENITIES OF ADJACENT RESIDENTS AND THE SURROUNDING AREA. APPLICANTS WILL BE REQUIRED TO SUBMIT DETAILS OF EXTRACTION, FILTRATION, REFRIGERATION OR AIR CONDITIONING UNITS WITH THEIR APPLICATION.

APART FROM CHANGES OF USE TO A2, A3, A4 AND A5 IN ACCORDANCE WITH THE POLICY SET OUT ABOVE, CHANGE OF USE TO ANY OTHER NON-RETAIL USES WILL NOT BE PERMITTED

2.35 The adopted Replacement Local Plan includes a series of specific policies for development in Brentwood town centre.

- **Policy TC6 – Small Scale Shops**

  CROWN STREET, ONGAR ROAD, THE ARCADE AND KINGS ROAD ARE ALLOCATED FOR SMALL-SCALE SHOPS AS DEFINED ON THE PROPOSALS MAP. LARGER SHOP UNITS WILL NOT BE ALLOWED IN THESE AREAS

- **Policy TC7 – Non-Retail Uses**

  (i) WITHIN THE GROUND FLOOR OF PREMISES IN EACH OF THE FOLLOWING BLOCKS A FURTHER A2, A3, A4 OR A5 USE WILL BE ALLOWED ONLY WHERE

  1. IT WOULD RESULT IN NO MORE THAN TWO ADJACENT NON-RETAIL USES, AND

  2. IT WOULD RESULT IN NO MORE THAN 40% OF UNITS IN ANY OF THE BLOCKS BEING USED FOR NON-RETAIL USES,

     a) 52-76 ONGAR ROAD, 4 NORTH ROAD AND 49-71 ONGAR ROAD

     b) 1-23 AND 2-12 HIGH STREET, 1-11 AND 2-6 INGRAVE ROAD, BANK CHAMBERS, 3-25, 2,4,6,14,14A AND 16 ONGAR ROAD

     c) 2-30, 60 & 62 AND 5-31 CROWN STREET, AND 1-7 HART STREET

     d) 21-51, 36-48 KINGS ROAD

     e) 56-114 AND 75-137 HIGH STREET

     f) 120, 141-159 HIGH STREET AND 2 WEALD ROAD

  (ii) WITHIN THE BRENTWOOD ARCADE A FURTHER A2, A3, A4 OR A5 USE WILL BE ALLOWED ONLY WHERE:

1. IT WOULD RESULT IN NO MORE THAN TWO ADJACENT NON-RETAIL USES, AND

2. IT WOULD RESULT IN NO MORE THAN 25% OF UNITS BEING USED FOR NON-RETAIL USES

(iii) WITHIN THE PRIME SHOPPING AREA (DEFINED AS 25-73A AND 14-54 HIGH STREET, AND THE BAYTREE CENTRE) NO FURTHER A2, A3, A4 OR A5 USES WILL BE ALLOWED

WHERE A3, A4 OR A5 USES MEET THE ABOVE CRITERIA, PLANNING PERMISSION WILL ONLY BE GRANTED WHERE THE IMPOSITION OF CONDITIONS REGARDING, INTER ALIA, HOURS OF OPENING AND CONTROL OF NOISES AND SMELLS CAN PROTECT THE AMENITIES OF ADJACENT RESIDENTS AND THE SURROUNDING AREA. APPLICANTS WILL BE REQUIRED TO SUBMIT DETAILS OF EXTRACTION, FILTRATION, REFRIGERATION OR AIR CONDITIONING UNITS WITH THEIR APPLICATION.

APART FROM CHANGES OF USE TO A2, A3, A4 AND A5 IN ACCORDANCE WITH THE POLICY SET OUT ABOVE, CHANGE OF USE TO ANY OTHER NON-RETAIL USES WILL NOT BE ALLOWED

- **Policy TC8 – Professional/Financial Office Uses**

NOS. 117 AND 16-26 ST. THOMAS' ROAD AS IDENTIFIED ON THE PROPOSALS MAP ARE ALLOCATED FOR CLASS A2 USES. OUTSIDE OF THIS SPECIFIC AREA FURTHER CLASS A2 USES WILL ONLY BE ALLOWED IN THE TOWN CENTRE AREA AS SPECIFIED IN POLICY TC7 OR WITHIN THOSE AREAS ALLOCATED OR USED FOR OFFICE PURPOSES

- **Policy TC9 – Telephone Exchange Site**

ANY PROPOSALS FOR REDEVELOPMENT/RE-USE OF THE TELEPHONE EXCHANGE SHALL INCLUDE A MIX OF USES INCLUDING RESIDENTIAL, LEISURE/ RECREATIONAL, AND B1 USES

- **Policy TC10 – William Hunter Way Site**

WHILST NOT PRECLUDING CONSIDERATION OF ANY PROPOSALS THAT MAY COME FORWARD FOR THE REDEVELOPMENT OF THE LAND, IN WHOLE OR PART, FOR A MIXED USE DEVELOPMENT, THE SITE OF THE WILLIAM HUNTER WAY CAR PARK IS TO BE RETAINED AND IMPROVED FOR SHORT STAY SHOPPERS' CAR PARKING IN LINE WITH POLICY T6. EXISTING LONG STAY PARKING WILL BE CRITICALLY ASSESSED AND, WHERE APPROPRIATE, REDUCED.

THE LONGER TERM FUTURE USE OF THE SITE WILL BE RECONSIDERED IN THE LIGHT OF THE CONCLUSIONS OF THE HIGH STREET AREA TRANSPORTATION STUDY AND AN ASSESSMENT OF SHOPPING DEMAND FOLLOWING THE COMPLETION OF THE REFURBISHMENT OR REDEVELOPMENT OF THE BAYTREE CENTRE.

- **Policy TC15 – Shops Fronts Facing William Hunter Way Site**

ON PREMISES FRONTING THE NORTH SIDE OF THE HIGH STREET, THE PROVISION OF AN ADDITIONAL SHOP FRONT ON TO WILLIAM HUNTER WAY WILL BE ENCOURAGED, SUBJECT TO COMPLYING WITH POLICY C20. IN ANY REDEVELOPMENT PROPOSALS AFFECTING SUCH PREMISES, THE COUNCIL WILL SIMILARLY ENCOURAGE THE PROVISION OF DOUBLE FRONTED SHOP UNITS

Local Development Framework

2.36 Brentwood Council and Local Strategic Partnership consulted on "Issues and Options" for both the Core Strategy and the Sustainable Community Strategy in November and December 2009[8]. The consultation sought views on a long-term vision, issues facing the Borough to 2031 and spatial options for development,

2.37 Consultation **Theme 3,** the Local Economy and Economic Development, identified a number of key issues to be addressed – namely how to:

- safeguard the distinctive character of Brentwood town centre and maintain its vitality and viability;

[8] Pathway to a Sustainable Brentwood: Issues and Options Consultation Document, November 2009

- promote further growth of Brentwood town centre as the main location for further retail, employment, recreation, and leisure facilities in the Borough, based on the identified needs of the population;

- maintain the roles and functions of Ingatestone, Shenfield and Warley Hill district centres and other local parades and ensure that they continue to provide a range of local facilities;

- improve access to the Borough's shopping centres and promote the use of public transport within these;

- maintain, manage and continue to enhance the quality of the public realm within the town centre and other local centres that create comfortable, safe an usable places; and

- manage car parking and traffic movement in town and local centres.

2.38 The consultation document invited comments on four spatial options for potential future development in the Borough, as follows:

1. Centralised Growth

2. Transport Corridor-led growth

3. Semi-Dispersed Growth

4. Dispersed Growth

2.39 Responses[9] indicated there was strong support for Brentwood being maintained as the principle shopping centre and for maintaining the viability of district shopping centres in Ingatestone, Shenfield and Warley Hill.

2.40 Strong support was shown for enhancing Brentwood town by improving cultural, leisure and community facilities and variety of shops. Less support was shown towards the idea that the town centre should have a greater variety of cafes, bars and restaurants. Several respondents raised concerns about the number of bars

9 Brentwood Sustainable Community Strategy and Local Development Framework Core Strategy Issues and Options Consultation: Preliminary Analysis – February 2010

and restaurants already in the town centre, problems this can give rise to, and parking.

2.41 The suggestion that new commercial development should provide for a mix of job opportunities and provide for the needs of small and medium size business was strongly supported; as was the suggestion that support should be provided to existing local business to remain viable and competitive.

2.42 In parallel with work on the local development plan the Council has adopted a Supplementary Planning Document[10] for shop fronts in Brentwood town centre.

2.43 Other related work includes the Council, working in partnership with the Urban Design and Landscape and Historic Buildings team at Essex County Council, to produce a 'vision' for Brentwood town centre[11]. This identifies issues facing the centre – notably:

- the loss of good historical buildings in the High Street;
- poor maintenance of High Street and alleyways off the main street;
- the need for better joined up thinking regarding several different sites nearby; and
- the relationship between the development opportunity at William Hunter Way and the rest of the town centre, specifically how the site can successfully integrate with Brentwood High Street.

2.45 The Brentwood Town Centre Regeneration Strategy identifies a number of possible opportunities including:

- The need for town centre public space strategy and a cohesive approach to linkages from High Street to William Hunter Way;
- An analysis of existing trees and their role in the historic market town;
- Public realm environs on William Hunter Way – possible scope for trees;

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10 Shopfront Guidance for Brentwood Town Centre: Adopted Supplementary Planning Document - The Essex Design Initiative in partnership with Brentwood Borough Council – March 2011

11 Brentwood Town Centre Regeneration Strategy– The Essex Design Initiative Exemplar Programme in Partnership with Brentwood Borough Council – May 2010

- Joined up approach for the High Street, William Hunter Way and the proposed redevelopment and need to form better linkages to the High Street;
- Establishing some form of market at the wider end of the High Street;
- Engaging traders to improve existing shop fronts;
- Adopting a more cohesive design approach to lighting; and
- The need for a 'fine-grained' study of the alleyways and how they might be improved.

2.46 A plan illustrating the above ideas, taken from the Vision document can be found in the Appendix to this Study – see **Plan 1** attached within **Volume 2** of this study.

3. Wider Shopping Trends

3.1 Before considering existing shopping patterns, the health and vitality of Brentwood and other smaller centres in the Borough, and the quantitative need for additional floorspace, it is relevant to briefly consider wider shopping trends likely to influence retailing during the life of the local development plan. The potential effects of the present economic downturn are also considered.

Demographics

3.2 Demographic changes over the last 20 years have had a fundamental impact on consumer spending patterns. Amongst a series of changes perhaps three have, in particular, influenced spending behaviour:

- **Increased household formation**: Whilst the UK population has increased at about 0.3% per annum the number of households has increased by nearly three times that rate, as household size has decreased due to smaller families, single person households, more divorces and people living longer.

- **An ageing population**. Over the next 20 years the over 60s age group in the UK as a whole is expected to grow by 5.3m or 41% and the under 60s age group by 4%. Older shoppers have a younger mindset than in the past, are more fashion aware and generally are financially better off than previous generations. Whilst many have benefited from house price and personal income growth, the adequacy of existing pension arrangements are a growing concern for many. Older consumers tend to have more time to shop often spending more on DIY and gardening items whilst expecting good customer service.

- **Younger shoppers**. At the other end of the spectrum younger shoppers will experience higher housing costs, will generally be more computer literate and spend more online, and will spend more on entertainment/leisure so they may have less to spend on retail in the High Street.

Income and Expenditure

3.3 Incomes and expenditure have, until recently, shown strong growth over the last 20 years, with retail expenditure generally growing faster than incomes. Retail expenditure has increased by 3.5% per annum in real terms over the period between 1989-2009, while expenditure on leisure[12] over the same period has grown by 1.4% per annum.

3.4 The majority of this retail expenditure growth has been on *comparison goods** – where growth has typically been over 5% per annum. Growth on convenience goods over the same period has been more modest - around 0.7% per annum[13].

3.5 The effect of the economic downturn means that retail expenditure growth has fallen dramatically (to 1.9% in 2008 and -1.4% in 2009). Although the modest growth experienced in 2010 (0.3%) is expected to continue, high levels of consumer debt, low savings ratios and reduced availability of consumer credit and a generally weaker housing market is expected to constrain expenditure growth going forward. As a result current forecasts do not expect expenditure growth to return to the levels their pre-2007 highs in the foreseeable future.

3.6 Latest forecasts suggest that total retail expenditure is now expected to grow at around 0.8% for 2011, 1.8% for 2012 and then at 2.1% per annum for the period between 2013-17. Expenditure on convenience goods is expected to show no growth in 2011, 0.4% growth in 2012 and 0.8% per annum for the period between 2013-17. Expenditure on comparison goods is expected to grow at 1.2% in 2011, 2.4% in 2012 and at 2.7% per annum for the period between 2013-17.

3.7 Longer working hours for many people has meant that shop opening hours (particularly in larger centres) have now extended and Sunday is now one of the strongest trading days in the week in many locations. This has implications for where retail expenditure is concentrated and the nature of some shopping trips which are considered to be a quasi-leisure experience. By contrast, some stores in smaller centres have not increased opening hours and do not open on a Sunday and, as a result, may have lost out to other larger stores and centres that do.

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12 Based on COICOP expenditure categories – recreational and sporting services; cultural services; games of chance; restaurants and cafes; accommodation services and hairdressing salons and personal growing.

13 See Figure 1 in Experian Retail Planner Briefing Note 8.1 – August 2010

* Comparison goods can be described as goods that consumers buy at infrequent intervals and would normally compare prices before buying eg. TV, Fridges, clothes, etc.

Increased Mobility

3.8 Income growth has also led to increased car ownership and personal mobility. Over the last 25 years the number of households having access to one or more cars has increased nationally from about 55% to about 73% and the number with two or more cars has nearly trebled from 11% to 29%. In Brentwood over 80% of households have access to a car and the number of households with two or more cars stands at 40%, reflecting the area's above average income.

3.9 These very high levels of car ownership mean that the overwhelming majority of households in Brentwood have a potentially wide choice of shopping destinations. As the household survey accompanying this report reveals, many Borough residents are now willing, and able, to travel to other centres or specific individual retail outlets that offer the choice they are looking for or best serve their shopping needs.

3.10 This increase in personal mobility has generally favoured the larger centres over smaller ones. These centres have tended to increase in size and importance relative to small centres – particularly for key comparison goods and "big ticket" items. As a result, most regional or sub-regional shopping centres in both greater London and the South East have tended to increase in both size and importance relative to smaller centres. Where new development, or redevelopment, has taken place then the attraction of these centres has been further enhanced – particularly to more affluent and mobile shoppers.

3.11 Centres that have been unable to provide new shopping facilities or improve existing ones have generally lost market share – particularly for comparison goods to other centres nearby who have seen new investment – and, in the main, have seen much less new development than the overall rate of expenditure growth would imply.

3.12 Smaller centres continue to provide the main destination for most food and day-to-day shopping, but have had to adapt. This has usually involved improving their non-food shopping offer, the availability of services as well as enhancing their leisure and recreational offer, in order to encourage local consumers to undertake complementary activities when doing the daily or weekly food shop.

3.13 Increased mobility and growth in expenditure has also stimulated out-of-centre development. This has generally grown much more rapidly than town centre development and, over the last 20 years, the majority of new retail floorspace has been in edge, or out-of-centre, locations. Changes in national planning policy have now restricted further growth of out-of-town development, but it is only in recent years that the rate of expansion of out-of-centre development started to slow. Despite the fact that new out-of-centre development is now likely to be strictly controlled, market analysts such as Verdict continue to expect retail sales at out-of-centre locations to increase at a faster rate than town centre locations in the foreseeable future.

3.14 Government policies to control use of the private car and reduce the need to travel are unlikely, in themselves, to materially alter existing shopping patterns in the short term. On the other hand, the combination of improved retail provision locally (including, for example, the diversification of products sold in existing large supermarkets in the Borough) as well as growing use of on-line retailing for certain product categories, combined with increased fuel costs may well diminish people's willingness to travel for shopping, or the frequency with which certain shopping trips are undertaken.

The Influence of Multiples and Size of Units

3.15 There have been structural changes in retailing. The past 20 years has seen growth of multiple retailers who now tend to dominate the national retail scene. National multiple retailers normally require larger shop units than smaller regional chains and independent retailers. New shopping centre developments and out-of-centre development have been more able to accommodate this demand for larger sized units (typically 500 – 2,000 sq m or larger). As a result they have grown in importance and, in doing so, reinforced the importance of higher order shopping centres and out-of-centre retailing destinations; this has led to a polarisation in the retail hierarchy.

3.16 The presence of well-known multiple retailers is one of the main attractors in any major centre and/or town centre development scheme. Whilst concerns have been expressed[14] regarding the impact that this concentration of multiple retailers can

[14] New Economics Foundation "Clone Town Britain: The loss of local identity on the nation's high streets" 2006

have on retail diversity and on smaller, independent or local retailers, those centres that have been able to accommodate the needs of multiple retailers – either in existing units or as part of new town centre redevelopment schemes - have tended to be the most commercially successful. Centres that have been unable to provide modern space in the right configuration have, in the main, tended to lose out to those centres that are able to offer modern attractive shop units.

3.17 The unit size requirements of most multiple retailers who are continuing to seek representation in town centres are increasing. This demand for larger unit sizes amongst multiples, combined with the relative decline of smaller independent retailers, has meant that older, smaller units have become more difficult to let to retail occupiers.

3.18 Alongside retailers' changing unit size requirements, there has been increased pressure from non-retail occupiers such as coffee shops, restaurants/take away outlets, estate agents, financial service providers, etc for this space. Traditionally the planning process has sought to exert tight controls on the infiltration of these uses – particularly in key retail frontages. Although it is generally accepted that the presence of these uses can enhance the attractiveness of centres as a shopping destination, it is also recognised that a proliferation of non-retail uses in key frontages can affect the vitality of some parts of the centre.

Increased Productivity and Sales Density Increases

3.19 The acutely competitive nature of UK retailing has meant that there has been increased productivity since the last recession of the early 1990's. Whilst growth in retail expenditure may have been running at around 4% per annum on average, retail employment has increased much more slowly. Over the last ten years total employees in retail employment have increased from 2.1 million to 2.9 million, an increase of 1.75% per annum. However, this growth has been almost entirely in part time employees. Full time equivalent (FTE) employment has hardly increased at all, from about 2 million to 2.2 million, a 0.5% per annum increase. Continued pressure for productivity improvements is likely to mean that employment in retailing is unlikely to grow significantly. For example, in the next 15 years Experian Business Strategies expect an overall decline in FTE employment with only a marginal increase in part time employment.

3.20 Improving productivity has also led to an intensification of sales densities- particularly amongst the leading and most successful multiple retailers. Many commentators suggest that increases in sales densities (£ per sq m retail sales floorspace) experienced during the height of the consumer boom – when growth in retail expenditure was outstripping the development of new floorspace to service it - are unlikely to be sustained in more austere times.

3.21 Although there is no definitive evidence of how sales densities for all retail floorspace are likely to evolve in the future, it is generally accepted that after a period of little or no growth in 2011-12, sales densities could be expected to start to grow again thereafter - at around 0.4% per annum for convenience goods and at 2.6% per annum for comparison goods. Indeed the Government's policy detailed in PPS6 requires that quantitative need/capacity assessments have regard to the potential continuing effect of such improvements in assessing the need for further floorspace growth[15].

3.22 At the same time, the limitations on convenience goods expenditure, and in an effort to serve growing customer demand, there is now an increasing emphasis on the sale of comparison goods at large foodstores. Whilst sales densities for comparison goods may be lower than for convenience goods, future growth rates for comparison goods are potentially much higher than for convenience goods and margins are greater. As a result all the leading foodstore operators are seeking to extend their comparison goods offer; some are turning the largest, or extended, stores into variety or mini department stores. This trend poses a potential threat to smaller centres, as larger foodstores will increasingly sell a wider product range of day-to-day convenience and comparison goods and services.

3.23 At the same time, in contrast to the trend noted above, restrictions on out-of-centre development and changing socio-economic trends have meant that several large foodstore operators such as Tesco and Sainsbury's have developed small convenience store formats that have allowed them to return to the high street or locate on petrol filling station forecourts.

15 See PPS6 paragraph 2.34

On-line Retailing

3.24 The combination of longer working hours, demand for extended consumer choice, growing price awareness, and the widespread availability of internet access has meant there has been a huge growth in non-store shopping in the last 10 years – albeit from a small base.

3.25 In February 2010, the Office for National Statistics announced changes to the methodology previously used to calculate non-store trading. This gave the impression of there having been a large increase in spending accounted for by internet sales from around 4.9% previously to over 7% - although there is currently no official breakdown of internet sales between convenience and comparison goods.

3.26 The latest forecasts suggest non-store trading continuing to grow at a faster rate than total retail sales – at least until 2016, when it is expected to reach 12.6% of all retail sales. After that time it is currently envisaged that the market would have reached maturity and non-store retailing will grow in line with retail sales as a whole.

3.27 Non-store retailing affects different sectors in different ways and it is therefore difficult to draw general conclusions. Whilst the internet already has a major impact on some sectors such as travel agency, audio and book retailing, its effect in other areas is less certain. Growth in non-store expenditure is potentially at the expense of both existing (and proposed) retail floorspace and, by extension, town centres. Town centres must therefore provide attractive, accessible and vibrant shopping areas if they are to compete with the convenience of online shopping.

Shopping and Leisure

3.28 Retailing in larger sub-regional centres and the more attractive, or specialised, smaller centres is changing. There is a blurring of the distinction between trips made exclusively for shopping and those now being made for leisure.

3.29 "Leisure" can encompass a wide variety of uses including cinemas, indoor and outdoor sporting facilities, community uses such as halls and community centres and tourist attractions. It can also include cafés, restaurants and coffee shops where the main purpose of the visit is spending leisure time rather than making purchases. There has been a rapid expansion in the number of coffee shops operating in town centres across the country, led by familiar brands such as Starbucks, Costa Coffee and Caffe Nero. Their recognition that customers are looking to relax and socialise rather than simply make purchases has led to other restaurant and bar operators who compete for this leisure-spend to alter their approach.

3.30 This expansion and improvement in quality leisure provision has resulted in leisure expenditure increasing as a proportion of family outgoings. According to The Office for National Statistics' *Family Spending*[16] report (2008) "leisure services" accounted for 11% of household expenditure in 1995, but by 2008 this had risen to 14%. Leisure uses have therefore become a more important part of everyday lives and, as a result, a more prominent feature in town centres.

3.31 Choice of restaurants, coffee shops, cafes and bars, and other facilities such as health and fitness centres, cinemas and multiplexes in larger centres, is now a key element in any town's "offer" to prospective shoppers and/or visitors. Their presence is not only important in attracting shoppers but also encourages longer stays and higher spending. Pedestrianised streets, a safe and attractive retail environment, along with good accessibility, ample car parking and reliable public transport are important in enhancing the attractiveness of the town centre to shoppers and tourists alike. The provision of an attractive combination of retail and leisure facilities can also reduce the need for local residents to travel to larger centres further afield.

The Effect of the Economic Downturn

3.32 The collapse of Lehman Brothers in September 2008 is seen as a watershed - heralding a major collapse in international capital markets and the point where the general public began to realise there were significant difficulties relating to not only the UK economy but world markets as well. This collapse has had a profound effect on the UK economy, UK consumers, property owners, investors and the development community.

3.33 Many retailers have been forced into administration or receivership since that time and this has had a major impact on the UK retail occupational market.

[16] Table 4.1, *Family Spending 2009*, Office for National Statistics

Companies such as Woolworths have failed completely and disappeared from the high street leaving over 800 units vacant across the UK. Although many units have been re-occupied, it was always unlikely that there would be enough demand, even in a strong market to take up the sheer number of vacancies now arising in many high streets.

3.34 Other companies have gone into administration and then been brought back to life through the use of 'pre packaged' administrations (pre-packs) whereby the purchaser only takes on part of the old company. This has usually included retaining the most profitable branches or those that through the renegotiation of lease terms with their landlords can be turned into profitable branches.

3.35 It is estimated[17] that the average vacancy rate in town centre retail space in the UK as a whole has risen from 12% in 2009 to over 14.5% in 2010.

3.36 The collapse of the market has left many retailers tied into lease terms whereby rents were set in better times when turnovers and profitability were higher, yet the rent is fixed and these criteria have now fallen away. Some retailers have threatened to put their companies into receivership unless landlords are able to renegotiate existing rental terms. In the case of lease renewals, one would usually expect a rental uplift and reoccupation by the same tenant, however, in the current market, some tenants are walking away completely where units are not profitable or they believe there is little likelihood of achieving profitability in the short to medium term.

[17] Local Data Company 'Terminal Illness or Gradual Decline' February 2011

4. Overview of Household Survey Patterns

4.1 Households in Brentwood Borough have a choice of destination for their shopping trips. As well as Brentwood town centre, there are several major town centres, shopping centres and retail parks in relatively close proximity which offer significant additional shopping facilities. In particular, the major town centres of Basildon, Billericay, Chelmsford and Romford offer a significant quantum and range of retailing, both through town centre shopping and out of town retail warehousing. Bluewater and Lakeside shopping centres are also significant competing retail destinations. These various centres and retail parks exert considerable influence over the shopping behaviour of Borough residents - particularly for comparison goods.

4.2 Shoppers' choice of destination is informed by a number of elements including the perceived strength of anchor traders in centres; the volume, variety and quality of other shops present; the quality and convenience of the centre (including accessibility of the centre by car, convenience and cost of car parking, and accessibility by public transport and other means); the perceived safety and security of the centre; availability of public facilities; and the overall quality of the shopping experience.

4.3 In order to provide empirical evidence on existing local shopping and leisure patterns and preferences, a household survey was commissioned by Chase & Partners on behalf of the Council in October 2010. The survey methodology and questionnaire were agreed with officers prior to commencement of the fieldwork. A copy of the questionnaire is included in **Appendix A**.

4.4 The household survey was designed to identify destinations used for the following types of shopping trips:

- main food;
- top-up food;
- clothes, footwear and other fashion goods;
- furniture, carpets and other floor coverings;
- household textiles and soft furnishings;

- domestic electrical appliances e.g. fridges, washing machines;
- audio visual, telephone, photo and IT equipment;
- China, glass and utensils;
- DIY goods, gardening goods and decorating supplies;
- Books, jewellery, sporting, recreational and luxury goods (Miscellaneous); and
- Chemist's goods.

4.5 The survey sought to identify those destinations used for services as well as the following types of leisure and entertainment:

- Tenpin bowling;
- Visiting cafes/ restaurants/ food specialists;
- Visiting the cinema;
- Visiting evening entertainment venues/ late licence premises;
- Going to pubs/ bars;
- Visiting a sports, leisure centre;
- Swimming;
- Visiting the theatre or arts/ performance venues;
- Organised sport;
- Private gym;
- Public gym; or
- Private sports venue e.g. Brentwood Football Club.

4.6 The study area for the survey is shown on the plan attached at **Appendix B**. This is based on postcode areas and split into eight zones, two of which were sub-zones, CM11 and RM4. The study area includes Brentwood Borough and some surrounding postcode zones outside of the Borough boundaries. The survey was based on a stratified sample of households living within the following postcode areas:

- CM4

- CM11
- CM12
- CM13
- CM14
- CM15
- RM3
- RM4

4.7 Structured interviews were carried out by telephone with the person responsible for the main household shop in a total of 1,005 households, split proportionately between the eight zones. As well as ascertaining centres and stores used for a variety of shopping and leisure visits, the survey also sought information on how respondents travelled (i.e. modes of transport) and general attitudes to shopping and leisure in the study area. The complete results of the survey are contained within **Appendix C**.

Convenience Goods Shopping Behaviour

4.7 Convenience shopping is defined within national planning policy as "the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionary" (PPS4 Annex B).

4.8 As is the case with most surveys of this nature, the survey results confirm that catchments for food shopping in the study area tend to be less extensive than for non-food shopping. The main foodstores within the study area and the surrounding towns retain high levels of expenditure from their immediate vicinities and the rural areas beyond. For example, the Sainsbury's supermarket in Brentwood attracts a large proportion of the main food shopping expenditure from within CM13, CM14 and CM15, 47.6%, 63.0% and 61.7% respectively; the Tesco supermarket at Gallows Corner in Romford attracts 62% of the main food shopping expenditure from within RM3; Waitrose in Billericay attracts 25% and 30% of main food shopping expenditure from CM11 and CM12 respectively; and the Tesco supermarket on Princess Road in Chelmsford attracts 25% of main food shopping expenditure from CM4. Please refer to Table 1 overleaf.

Table 1: Study Area Main Food Shopping Destinations by Market Shares

Store	Total	CM4	CM11	CM12	CM13	CM14	CM15	RM3	RM4
Sainsbury's, Brentwood	27.0%	20.6%	0.0%	1.5%	47.6%	63.0%	61.7%	3.0%	50.0%
Tesco, Gallows Corner, Romford	22.4%	5.9%	0.0%	0.0%	7.2%	16.8%	12.1%	62.8%	0.0%
Waitrose, Billericay	9.2%	8.8%	25.0%	39.0%	4.2%	0.0%	2.0%	0.0%	0.0%
Asda, Pipps Hill, Basildon	3.7%	0.0%	14.1%	6.6%	7.2%	0.0%	0.7%	0.7%	0.0%
Tesco, Mayflower, Basildon	3.4%	0.0%	10.9%	15.4%	0.6%	0.8%	0.7%	0.0%	0.0%
Tesco, Laindon Hills, Basildon	3.0%	0.0%	4.3%	5.9%	9.0%	1.7%	0.7%	0.0%	0.0%
Tesco, Princess Road, Chelmsford	2.9%	25.0%	3.3%	1.5%	1.2%	0.0%	3.4%	0.0%	0.0%
Co-op, Queens Park, Billericay	2.3%	0.0%	5.4%	10.3%	2.4%	0.0%	0.0%	0.0%	0.0%
M&S, High Street, Brentwood	1.9%	1.5%	0.0%	0.0%	3.0%	6.7%	3.4%	0.0%	0.0%
Internet	1.8%	1.5%	3.3%	3.7%	0.0%	3.4%	2.0%	0.7%	0.0%

Source: Research & Marketing Household Survey Results November 2010

4.9 In terms of Brentwood town centre, the results confirm that Sainsbury's dominates main food shopping expenditure within the surrounding area accounting for 47.6%, 63.0% and 61.7% respectively within zones CM13, CM14 and CM15 as stated above. Marks & Spencer (M&S) retains a modest amount of main food shopping expenditure from the same three zones, 3%, 6.7% and 3.4% respectively. With regard to other food stores in Brentwood town centre such as The Co-op within the Baytree Centre and Iceland on the High Street, the results show a negligible level of main food shopping expenditure from the study area, 1.1% and 0.9% respectively.

4.10 It is worth noting that a high proportion of linked trips take place within Brentwood town centre and surrounding postcode zones. 58.4%, 58.3% and 59.6% of residents within zones CM13, CM14 and CM15 respectively combine their main food shop with non-food shopping in the same journey compared with just 53.5% across the entire study area. This should be considered an indicator of the strength of Brentwood town centre's retail offer. It also emphasises the importance of Sainsbury's supermarket which provides free parking to shoppers who spend over £5 within the store.

Table 2: Top-Up Food Shopping Destinations by Market Shares

Store	Total	CM4	CM11	CM12	CM13	CM14	CM15	RM3	RM4
Waitrose, Billericay	6.6%	0.0%	22.8 %	30.1 %	1.8%	0.0%	0.7%	0.0%	0.0%
Sainsbury's, Brentwood	6.3%	2.9%	0.0%	0.0%	13.3 %	17.6 %	11.4 %	0.4%	0.0%
Tesco, Gallows Corner, Romford	4.9%	1.5%	0.0%	0.0%	1.2%	0.8%	0.0%	16.4 %	0.0%
Local Stores, Brentwood	4.6%	1.5%	2.2%	0.0%	6.0%	14.3 %	10.7 %	0.0%	0.0%
Co-op, Queens Park, Billericay	4.1%	2.9%	6.5%	24.3 %	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Harold Wood, Romford	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.9 %	0.0%
Local Stores, Billericay	3.0%	1.5%	15.2 %	10.3 %	0.6%	0.0%	0.0%	0.0%	0.0%
M&S, High Street, Brentwood	2.8%	0.0%	0.0%	0.0%	3.6%	9.2%	6.0%	0.7%	0.0%
Local Stores, Harold Hill	2.7%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	9.3%	0.0%
Co-op, Shenfield	2.6%	0.0%	0.0%	0.0%	12.0 %	0.0%	4.0%	0.0%	0.0%

Source: Research & Marketing Household Survey Results November 2010

4.11 Top-up shopping patterns are typically more diffuse and influenced by factors such as commuting and the school run. This explains the somewhat scattered responses which include locations at a number of smaller local district centres, village centres and shopping parades such as those assessed within Section 6 of this study.

4.12 In terms of top-up expenditure patterns within each postcode zone:

- CM4 is dominated by stores in Ingatestone, 29.4% within Budgens, 17.6% within local stores and 11.8% within the Co-op;
- In CM11 Billericay stores figure largely with Waitrose accounting for 22% and local stores accounting for a further 15.2%;
- Again Billericay seems to dominate top-up expenditure from residents within CM12 with 30.1% taken by Waitrose, 24.3% by the Co-op at Queens Park and local Billericay stores take a further 10.3%;
- In CM13 stores within the Brentwood and Shenfield areas figure highly, Sainsbury's in Brentwood takes 13.3%, the Co-op in Shenfield takes 12.0% and the Co-op in Hutton takes a further 10.2%;

- CM14 is dominated by stores within Brentwood where Sainsbury's takes 17.6%, M&S 9.2%, Tesco Express on London Road 10.1% and the Co-op in the Baytree Centre 6.75%, in addition local stores within the town account for a further 14.3%;

- Convenience goods top-up expenditure within zone CM15 is shared between Brentwood and Shenfield in the main. In Brentwood Sainsbury's accounts for 11.4%, M&S on the High Street 6%, and local stores 10.7%. Within Shenfield Tesco Express on Hutton Road accounts for 5.4%, the Co-op 4%, and independent traders a further 5.4%. Interestingly the Budgens within Doddinghurst performs well accounting for 8.7%;

- Unsurprisingly top-up shopping expenditure within RM3 is dominated by stores within Romford, Harold Wood and Harold Hill, Tesco at Gallows Corner accounts for 16.4%, the Co-op at Harold Wood 11.9%, the Co-op at Harold Hill 5.6%, local stores in Harold Hill 9.3% and local stores within Romford 8.9%; and

- The level of respondents to the household survey from within zone RM4 was unfortunately too low to enable the results to show any meaningful information, only two respondents were from that postcode zone.

Farm Shops

4.13 Across the study area as a whole 38.5% of respondents buy food or other produce from a local farm shop. The proportion is much greater within those areas outside the M25: 19.7% of respondents from within postcode zone RM3 buy food or other produce from a local farm shop whereas 51.3% do from CM14 and 56.4% from CM15. The area to the north of Brentwood town centre therefore contains the highest proportion of respondents using farm shops, this is not surprising given its rural nature. The presence of Calcott Hall Farm just to the north of Brentwood off Ongar Road also contributes to this: 46.2% of all respondents within CM14 and 47.7% within CM15 use the farm shop. Another farm shop that performs well in the household survey results is at Barleylands Farm between Billericay and Basildon just off Southend Road (A129). 30.4% and 20.6% of residents within zones CM11 and CM12 respectively use the store, essentially Billericay and the surrounding area.

Comparison Goods Shopping Behaviour

4.14 Patterns of shopping for comparison goods amongst residents within the study area are far more complex than shopping patterns for convenience goods - there are many more factors which influence the results. For example, shoppers are prepared to travel much further when shopping for comparison goods; other factors such as the prevalence of certain key retailers or groupings of similar retailers can also influence expenditure patterns. The results of the household survey for each of the goods categories are analysed in turn below.

4.15 *Clothes, footwear and other fashion goods* – overall the main centres referred to are Romford and Lakeside which account for 22.5% and 21.8% of all respondents respectively. It should be noted however that Romford accounts for very few respondents in the majority of the postcode zones with the exception of RM3, therefore Lakeside would appear to exert the strongest influence over the residents within the study area in general. Both Chelmsford and Basildon exert a clear influence within the eastern part of the study area. Usage of Brentwood town centre is confined to shoppers from the immediately surrounding area in the main, zones CM13, CM14 and CM15.

4.16 *Furniture, carpets and other floor coverings* – there is a more diverse pattern of shopping for this category although Lakeside, Romford, Basildon and Chelmsford are prominent destinations. Brentwood town centre accounts for 6% of the overall respondents and 6.6%, 16.8% and 12.1% from the surrounding zones CM13, CM14 and CM15 - the centre is clearly underperforming in this sector. Retail parks such as Gallows Corner in Romford and Pipps Hill in Basildon perform relatively well, particularly within their local areas.

4.17 *Household textiles and soft furnishings* – there is a similar pattern here as with *furniture, carpets and other floor coverings* with Romford, Lakeside, Basildon and Chelmsford all cited. Retail warehousing is again cited but to a lesser extent. Although Brentwood town centre does not feature highly overall, it performs well within the surrounding postcode zones.

4.18 *Domestic electrical appliances e.g. fridges, washing machines* – internet and mail order together account for a substantial proportion of respondents in this category, 13.6%. Gallows Corner Retail Park however accounts for an even higher proportion at 15.9%, it should be noted that the majority of these are from the local postcode zone RM3 though. Brentwood town centre accounts for 11.1% of the overall respondents, again this is mainly confined to the surrounding area. Romford town centre, Chelmsford town centre and Lakeside shopping centre also account for a similar level of respondents from zones close by.

4.19 *AV, telephone, photo and IT equipment* - there is a similar pattern here to *domestic electrical appliances* above. Internet and mail order together account for the largest proportion of respondents – 13.9%. Brentwood and Romford town centres also perform well accounting for 11.2% and 11.1% respectively, mostly from within nearby postcode zones. Gallows Corner again figures highly and many other retail parks are cited such as Pipps Hill, Mayflower and Heron, all in Basildon.

4.20 *China, glass and utensils* – there is a similar pattern to *furniture, carpets and other floor coverings* and *household textiles and soft furnishings* here. The main centres of Romford, Lakeside and Brentwood account for the majority of shopping. Chelmsford and Basildon continue to exert influence over the eastern part of the study area.

4.21 *DIY goods, gardening goods and decorating supplies* – Gallows Corner Retail Park is by far the most popular destination for this goods category; 21.3% of respondents list it as their main destination for this type of shopping. 7.4% of respondents within postcode zone CM4 in the far east of the study area cited it as their primary destination, the third most popular destination within this zone. Brentwood, Romford and Basildon town centres are mentioned by a relatively high number of respondents mostly from their surrounding areas.

4.22 *Books, jewellery, sporting, recreational and luxury goods (Miscellaneous)* – a diverse range of centres are mentioned for this goods category. Centres of note are Brentwood town centre (16.7% of respondents), Romford town centre (13.5%) and Lakeside shopping centre (10.9%) again mostly from within their immediate vicinities. Internet/mail order accounts for a substantial proportion (14.3%) of the respondents.

4.23 *Chemist's goods* – the pattern for chemist's goods shopping tends to be similar to that for food, in general people use the largest available centre locally. As such the main centres dominate, Brentwood town centre accounts for 29.1% of all respondents and significantly 48.2%, 81.5% and 61.7% from zones CM13, CM14 and CM15 respectively. Likewise Billericay accounts for 29.1% of all respondents and up to nearly 70% from the surrounding area.

Shopping and Service

4.24 With regard to main towns used for shopping and services, the survey demonstrates the popularity of Brentwood town centre: 36.9% of all respondents cite it as the town centre they use most. It is particularly worth noting the dominance of Brentwood within the surrounding area, accounting for 62.7%, 94.1% and 77.2% of all respondents within zones CM13, CM14 and CM15 respectively. Romford also features highly with 25% of all respondents. although this is biased towards those from the west of the study area. Billericay, Basildon and Chelmsford town centres are also popular, but only within their respective immediate catchments.

4.25 The main reason cited for this pattern is that the shopping destination is 'close to home'. This is particularly the case for the three postcodes which surround Brentwood town.

4.26 When asked what improvements could be made to their local centre respondents in postcode zones surrounding Brentwood town made several suggestions. These included demand for car parking improvements such as free parking, lower parking charges and improved parking facilities; clearly this is an issue which is of concern for many local residents. Suggestions of increased car parking provision and lower parking charges are, however, common responses within household surveys of this nature. In Chase & Partners' experience it appears they are sometimes default suggestions often given even to centres with an oversupply of affordable parking.

4.27 Another suggestion of note from residents with postcode zones CM13, CM14 and CM15 is the wider provision retail choice specialists. This would appear to emphasise the need for Brentwood town centre to continue to try and distinguish itself from other nearby competing retail centres. The most common response to the question of what improvements could be made to their local centre from these three postcode zones, however, was 'nothing'. Considering the majority of respondents within these zones cited Brentwood as their main town centre for shopping and services, this should be considered an indication of the esteem with which the local population hold the centre and is a clear indication of its strength.

Leisure

4.28 In terms of the main leisure and entertainment activities residents within the study area enjoy on a regular basis, 65.5% of all respondents visit cafes and restaurants, 36.9% visit the cinema, 37.6% visit the theatre or partake in other cultural/arts entertainment, 29.5% visit pubs and bars, 21.7% swim, 16.5% use a leisure centre, 12.8% use a private gym and 12.7% go tenpin bowling.

4.29 With regard to the use of cafes and restaurants within Brentwood, 20.7% visit Prezzo, 16.1% Toby Carvery (The Artichoke), 14.5% Cafe Rouge, Zizzi 9.9%, Pizza Express 9.5%, 7% Harvester and 5.4% Il Bertorelli. It would appear on this evidence that the collection of multiple chain restaurants within Brentwood attract reasonable numbers of visitors and are popular with patrons of the centre.

4.30 With regard to cinema use within the study area, 40.2% of respondents go to Basildon, 33.4% to Romford and 15.6% to Chelmsford. In terms of the three postcode zones surrounding Brentwood town, the majority of respondents within CM13 (62.3%) use Basildon, most from CM14 (36.4%) visit Romford and most from CM15 (27.7%) visit Chelmsford. It is clear from the results that most respondents tend to visit their closest cinema. This is encouraging for Brentwood as planning permission has been granted for a six screen cinema as part of the William Hunter Way car park re-development. When development has been completed these results would suggest that Brentwood town centre can expect to claw back significant lost expenditure from these neighbouring towns.

4.31 Brentwood town centre performs well in terms of the retention of respondents to evening entertainment venues / late licensed premises within the surrounding area; 50%, 43.8% and 50% from within zones CM13, CM14 and CM15 respectively. Central London is the only notable alternative destination that respondents from within these postcode zones cite. The night time economy is a clear strength of Brentwood as seen within the results for visitors to pubs and bars; 46.3%, 86% and 65.2% of respondents from within zones CM13, CM14 and CM15 respectively visit pubs and bars within Brentwood most often.

4.32 Brentwood also performs well as a destination for sports and leisure centre visits (accounting for 52.4% of respondents throughout the study area) and swimming within public or private pools.

Overview of Household Survey Data

4.33 The household survey data is fundamentally important in seeking to establish the existing pattern of shopping behaviour for food, non-food goods and services as well as leisure and entertainment destinations amongst residents within the study area. It also assists in identifying the extent of the catchment of each of the four main centres within Brentwood Borough and the relationship of these centres and specific stores (particularly supermarkets) with neighbouring retail centres and locations.

4.34 The survey also provides useful background information on respondents' perception of the main centres and can be used, together with other material, to develop a clear view on the strengths (and weaknesses) of the Borough's local and village centres, and assist in devising detailed strategies to enhance the vitality and viability of these centres in the future.

4.35 The general picture to emerge for convenience goods is that expenditure is spent locally where possible. Within Brentwood town centre Sainsbury's is the main driver for this although other stores such as M&S and the Co-op play a part. A large number of visitors to Brentwood partake in linked shopping trips, combining the main weekly convenience goods shop with additional comparison goods shopping. This emphasises the importance of Sainsbury's where the cost of long stay car parking can be redeemed against the value of groceries. It is again worth noting that within the north of the study area, north of Brentwood town, farm shops play a significant role within the convenience goods shopping hierarchy.

4.36 For comparison goods, patterns are far more complex. Romford town centre and the neighbouring Gallows Corner Retail Park, Lakeside Shopping Centre and Basildon town centre are all prominent destinations for a number of goods categories. Brentwood performs well in terms of categories such as chemist goods, books, jewellery, sporting, recreational as well as luxury goods and china, glass and utensils. However, there are moderate levels of leakage from the Borough to surrounding towns and retail destinations for a number of goods categories.

4.37 In terms of leisure provision within Brentwood Borough, the results indicate both strengths and weaknesses. The lack of a cinema or tenpin bowling facility is a weakness, having said that interest in the latter activity within the study area is limited at present. Within Brentwood town centre the night time economy is clearly a strength. The centre attracts large proportions of visitors from the surrounding area to the numerous cafes, restaurants, pubs, bars and clubs located here. This should only improve in the future as Brentwood Borough Council works toward obtaining Purple Flag[18] status.

18 Purple Flag is a national accreditation scheme that recognises excellence in the management of town and city centres at night. It is designed to provide recognition that a centre is managing its night time experience and thus helping to overcome any negative public perceptions that may exist.

5. Assessments of the Vitality and Viability of Brentwood Town Centre, Warley Hill - Brentwood Station Area, Ingatestone and Shenfield

5.1 In accordance with the requirements of our brief, Chase & Partners have conducted an assessment of the health and vitality of the centres of Brentwood, Warley Hill, Ingatestone and Shenfield. Where reliable information is available we have assessed the vitality and viability of centres using indicators outlined in Annex D of Planning Policy Statement 4: Planning for Sustainable Economic Growth. These are:

- diversity of main town centre uses,
- amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations,
- potential capacity for growth,
- retailer representation and demand,
- rental levels,
- proportion of vacant street level property,
- commercial yields,
- pedestrian flows,
- accessibility,
- customer and residents' views and behaviour,
- perception of safety and occurrence of crime, and
- environmental quality.

5.2 Conclusions have been drawn on the overall health, vitality and viability of each of the centres, based upon these indicators.

Brentwood Town Centre

5.3 Situated 20 miles north-east of Central London, Brentwood is the principal settlement of the Borough located close to Junction 28 of the M25 motorway in south-west Essex.

5.4 Brentwood is an historic town dating back to the 12th Century when a small settlement was formed in a clearing along a road used by pilgrims from East Anglia and the Midlands travelling to Thomas Becket's tomb at Canterbury Cathedral. Brentwood grew steadily over the coming years through agriculture and related trade. In the latter half of the 12th century, a chapel was built for the growing population and passing pilgrims, the remains of which can still be seen in Brentwood's High Street today. The town has a rich military history with large armies of soldiers and militia based locally to repel the prospective invasions of the Spanish in the late 16th Century as well as the French during the time of the American War of Independence in the 18th Century.

5.5 Modern day Brentwood is an affluent suburban town within the 'London commuter belt' attracting several notable businesses, including Ford Motor Company UK headquarters, Equity Insurance Group, BT, BNY Mellon and Oce printing. The town centre, which has undergone comprehensive improvement works recently, is formed along the west to east orientated High Street acting as the centre's backbone with secondary retail parades to the north and south. Much of the town centre is within a Conservation Area, and is clean, well maintained with modern street furniture and a visually pleasing physical fabric. Other notable features include the Baytree Shopping Centre, a covered shopping precinct found south of the High Street, and a large Sainsbury's supermarket north of the High Street which anchors the town's retail offer.

Diversity of Uses

5.6 Based on the Goad centre report (see **Annex D**) and our street surveys conducted during August 2011 there are 253 units trading in Brentwood town centre on a total of some 46,260 sq m (497,900 sq ft) of retail floorspace, the composition of which is shown in Table 3 overleaf:

Table 3: Uses in Brentwood Town Centre

Category	Number of Units	%	National Average (%)	Amount of Floorspace (sq ft)	%	National Average (%)
Convenience	13	5	9	124,200	25	17
Comparison	92	36	42	220,000	44	47
Service	127	50	35	105,600	21	23
Misc	2	1	1	2,500	1	1
Vacant	19	8	13	48,100	10	11
Total	253	-	-	497,900	-	-

Source: Goad Centre Report (March 2010) and Chase & Partners Street Survey (August 2011)

5.7 Information in Table 3 above is taken from the Goad Centre Report for Brentwood together with our own street survey conducted in August 2011. The town centre retail uses have been divided into five distinct categories which enables analysis to be made and comparisons to be drawn between different centres. The units have been apportioned from our own street surveys and the floorspace by Experian Goad using the five categories: convenience goods, comparison goods, services, miscellaneous and vacant property. Examples of convenience goods retailers are food retailers such as butchers, bakers, grocers, fishmongers and supermarkets, other examples that fall into this category are off-licences, news agents and CTN stores. With regard to comparison goods retailers, they include those that specialise in items for the home such as DIY, furniture, homewares, white goods and household electrical; personal goods such as clothes, footwear, chemists and cosmetics; or personal interests/hobbies such books, music, sporting goods, etc. Service retailers will normally, but not always, provide a service as opposed to the sale of goods; they include restaurants, cafes, hairdressers, beauty salons, drycleaners, banks, estate agents and auctioneers. Miscellaneous properties are occupied by administrative or quasi-retail operators and government bodies such as careers offices, post offices and tourist information bureaus. Vacant units and floorspace is self explanatory.

5.8 Table 3 shows that in terms of convenience retail, the number of operators within Brentwood town centre is below the UK average but the amount of convenience floorspace is well above average. This difference can be explained the presence of the large Sainsbury's supermarket within the town centre and to a lesser extent The Co-op within the Baytree Centre and Iceland on the High Street. Sainsbury's supermarket is much larger than the typical town centre convenience stores that are found within most settlements of a similar size. The presence of the three well known supermarket retailers within Brentwood attracts a large number of shoppers and as such should be considered a strength of the centre.

5.9 This is proven by the results of the household survey where in the three postcode areas which make up Brentwood and the surrounding rural hinterland CM13, CM14 and CM15, the three supermarkets account for 54.8%, 72.3% and 69.1% of all main food shops respectively – see **Section 4** for further information.

5.10 In terms of comparison retail, both the number of units and the amount of floorspace within Brentwood are below the national average. There are a number of likely reasons for this, for example the proximity of Brentwood to higher order retail destinations such as Chelmsford, Romford (including Gallows Corner Retail Park) and Lakeside Shopping Centre in Thurrock. Many comparison goods retailers that have a presence within one or more of these rival shopping destinations will not regard it necessary to have a branch within Brentwood. This is illustrated by the Quantitative Data which shows these rival destinations draw high levels of expenditure for many of the comparison goods categories – see **Section 7** for further information.

5.11 Another reason for the below average level of comparison goods retailers and floorspace might be the limited supply of modern retail units within Brentwood. Many comparison goods retailers will only open a branch within a centre if there is a unit available that meets all their operational requirements in terms of size, servicing, and other arrangements.

5.12 The level of service retail units in Brentwood town centre is well above average at 50% compared with 35% nationally. Conversely the level of service retail floorspace is below average at 21% compared with 23% nationally. This can be partially explained by the large number of estate agents, hair and beauty specialists, interior design showrooms, restaurants, bars and cafes. These appear to be located in distinctive groupings as several of the restaurants, bars and cafes are located to the western end of the High Street where operators such as O'Neill's, Cafe Rouge, The Slug and Lettuce, Zizzi, McDonald's, Nando's, Domino's and Prezzo are all to be found. There are a large number of estate agents in the St Thomas Road and Moores Place vicinity. Furthermore, there is an obvious grouping of interior design show rooms at either end of the High Street.

Retail Floorspace in Edge-of-Centre and Out-of-Centre Locations

5.13 Within Brentwood there is a small amount of edge and out-of-centre retailing. To the west of the town centre there are some large retail units in the form of a Wickes and a Topps Tiles on Brook Street/London Road (A1032), the main vehicular route into town. The area is dominated by car showrooms, however, and these two units are the extent of the retail offer. The closest actual retail park is Gallows Corner to the west of Brentwood on the edge of Romford.

5.14 The centres of Warley Hill (Brentwood station area) and Shenfield are effectively edge-of-centre/out-of-centre retail destinations. Unlike the situation with Brook Street/London Road described above, both are recognised centres in their own right, albeit of a lower order than Brentwood. Further afield the surrounding centres of Warley, Ingrave, Hutton and Pilgrims Hatch are, in relation to Brentwood town centre, out-of-centre shopping destinations comprising small service/convenience centres providing mainly essential services and convenience goods retailing to local residents. They are therefore considered to have a negligible effect on Brentwood town centre as reflected in the Quantitative Expenditure Data – see **Section 7**.

Potential Capacity for Growth

5.15 Planning permission has been granted for the redevelopment of the Council owned William Hunter Way car park to the north of the High Street adjacent to Sainsbury's. The permission is for a 40,000 sq ft food store, two major up-market fashion stores, one smaller retail unit, a six screen cinema complex, a new multi-storey car park and several residential units. Once completed, the William Hunter Way development will create three major new anchors to Brentwood town centre in the form of the cinema and two major up-market fashion stores.

5.16 Elsewhere, the potential for growth is limited as the majority of the town centre is already fully developed. That said the piecemeal redevelopment of some High Street units might be financially viable in future, particularly those of limited architectural merit from the early 20th Century which detract from the quality of the rest of the Centre, including the Conservation Area, and do not meet modern retailer requirements, being relatively small and poorly serviced.

Retailer Representation and Demand

5.17 The level and quality of existing retail representation provides a measure of the strength of any centre. **Annex E** sets out the national multiple retailers currently represented in Brentwood town centre across a variety of goods categories. It shows that national multiple retailers are spread evenly amongst various Class 'A' retail uses and specialise in selling a diverse range of goods categories. There are a total of 98 national multiple retailers in Brentwood, representing close to 39% of the total stock of units within the centre. This is higher than the national average of 31% demonstrating that there is a strong market for retail units within Brentwood from national multiple operators. This is a clear indication of the centre's present strength.

5.18 It is useful to compare multiple retailer representation in the town centre with other local competing centres within the region - specifically Basildon, Billericay, Chelmsford and Romford. In Table 4 below, it can be seen that the number of multiple retailers in several local towns is greater than in Brentwood, furthermore the proportion of multiple retailers within these centres is also greater. In this way a regional hierarchy of retail centres can be observed: Romford, Chelmsford and Basildon all appear to be higher order centres than Brentwood attracting greater numbers and higher proportions of national multiple retailers, whereas Billericay is a lower order centre.

Table 4: Representation of Multiple Retailers

Centre	Multiple Count	Percentage of Total
Brentwood Town Centre	98	38.7%
Warley Hill	2	3.2%
Shenfield	15	16.7%
Ingatestone	9	14.5%
Basildon	166	56.9%
Billericay	56	35.2%
Chelmsford	225	43.6%
Romford	238	43.8%
UK Average	-	31.1%

Source: Goad Centre Reports and Chase and Partners Street Survey August 2011

5.19 **Plan 2** (see Appendices to this Report) shows the location of national multiple retailers within Brentwood town centre. The plan shows they are clustered along the High Street with the Baytree Centre and Chapel High the focus. The concentration of national multiples is strong along the majority of the length of the High Street but falls away on the eastern and western fringes.

5.20 Demand amongst retailers for representation in any centre is a significant indicator of not only a centre's commercial health but also its attractiveness. Table 5 below is an extract from Town FOCUS Reports on Brentwood, Basildon, Billericay, Chelmsford and the London Borough of Havering identifying trends in retailer requirements, i.e. the number of new shops sought by national multiple retailers for each centre over the period April 2001 – January 2010. Town FOCUS Reports on the centres considered in this study can be found in **Annex F**.

Table 5: Retailer Demand in Brentwood and Competing Centres

Date	Brentwood		Basildon		Billericay		Chelmsford		LB Havering	
	Reqs	Rank	Reqs	Rank	Reqs	Rank	Reqs	Rank	Reqs	Rank
Jan 2010	23	146	20	178	11	383	35	77	27	117
Apr 2009	25	138	20	183	16	235	46	48	0	n/a
Jan 2009	28	143	22	204	17	281	55	51	29	138
Oct 2007	63	105	47	163	28	327	103	39	n/a	n/a
Apr 2007	59	111	46	169	23	371	94	45	90	52
Oct 2006	57	121	49	160	19	444	94	48	93	49
Apr 2006	64	102	49	158	17	442	113	36	82	67
Oct 2005	62	116	47	170	17	441	121	36	78	72
Apr 2005	57	133	52	146	18	388	112	40	80	71
Oct 2004	58	115	51	141	17	393	107	38	70	83
Apr 2004	58	105	54	125	17	372	102	40	67	83
Oct 2003	59	117	51	131	19	331	114	35	62	105
Apr 2003	51	125	48	134	19	310	102	39	56	111
Oct 2002	50	133	55	120	20	306	110	35	60	102
Apr 2002	35	182	46	146	18	308	108	37	53	118
Oct 2001	35	175	46	131	13	351	89	40	55	99
Apr 2001	34	174	45	129	14	342	90	39	72	55

Source: Town FOCUS Reports

5.21 Table 5 shows that the total number of retailer requirements within Brentwood grew steadily from 34 in April 2001 to 64 in April 2006. There was then a short plateau between April 2006 and October 2007 at which time there was still 63 requirements. Due to a gap in the data the next available figure is given a year and a half later in January 2009. By this time, however, the number of retail requirements within Brentwood had fallen significantly to 23. Unsurprisingly this fall in the number of retailer requirements coincided with the recession of late 2008 / early 2009.

5.22 During this time widespread pay freezes and redundancies in both the private and public sectors resulted in an erosion of consumer confidence and a reduction in total consumer spending. This in turn diminished retailers' turnover, sales figures and confidence. A natural response among many retailers has been to postpone or even halt existing expansion plans. Hence the number of retailer requirements has declined in all but the most successful cities, towns and specialised shopping centres.

5.23 More accurate conclusions on the comparative performance of Brentwood town centre during the last five years can be drawn from its 'retail ranking' during this time. Focus ranks all town centres and retail destinations within Great Britain according to the number of retailers who have requirements for additional units, with 1^{st} being the centre with most requirements. As Table 5 above shows, since October 2007 Brentwood has fallen down the rankings from 105^{th} to a low of 146^{th} at the last count in January 2010. Although this evidence would suggest that Brentwood has underperformed as a centre over the last five years, it should not be considered conclusive as there are some limitations to the data as outlined in paragraph 5.25 below.

5.24 It is useful to compare the number of retailer requirements and consequent retail ranking of Brentwood with those of competing regional centres. Table 5 shows that retailer demand for representation in Brentwood compares well with that for space in Basildon (where there are 20 requirements), Billericay (11) and the London Borough of Havering (27). However, it also shows that retailer demand for representation in Chelmsford remains markedly higher where there are currently 35 requirements. This is reflected within the retail rankings of the various centres.

5.25 In terms of the type of retailers seeking representation, **Annex G** contains a comprehensive list of current retailer requirements from Focus, Perfect Information Property and the Shop Property databases. While this database may not be entirely comprehensive (for example some retailers may only be tempted into the centre if the right unit were to become available in the right location), it gives a measure of how many, and what type of retailers, currently view

Brentwood to be a desirable trading location. According to our research, it appears that demand is reasonable - in the past year 18 retailers have had a requirement for space within Brentwood. However, not included within the Focus schedule are the many other retailers who have nationwide requirements for space and might look to Brentwood as a promising location if the right type of unit became available.

Proportion of Vacant Street Level Property

5.26 Chase and Partners' street survey in August 2011 identified 19 vacant retail units within Brentwood town centre representing 8% of the total amount. This figure is much less than the national average, currently 13%, and is a strong indicator that Brentwood town centre is performing well in the present testing retail conditions.

5.27 **Plan 3** (see Appendices) shows the location of vacant properties in Brentwood town centre. It illustrates that in general there is an even distribution of vacant units scattered throughout the centre. With the vacancy rate so low, these can be attributed to the normal turnover of units rather than the difficult retailing conditions at the time of writing this report.

Commercial Yields

5.28 A further objective comparison of retail performance is provided by an assessment of investment yields. Yield is a measure of property value defined as a ratio of rental income to capital value. It is expressed in terms of the open market rent of a property as a percentage of the capital value. The higher the yield, the lower the rental income is valued and vice versa. Factors which affect yield are complex and need to be interpreted with reference to the circumstances in each individual town. Broadly speaking, however, low yields indicate that a town is considered to be attractive and as a result more likely to attract investment. Higher yields provide an indication of concern by investors that rental income might grow less rapidly and therefore be less secure.

Table 6: Regional Shopping Centre Yields

Shopping Centre	1/10/00	1/4/01	1/10/01	1/4/02	1/10/02	1/4/03	1/1/04	1/7/04	1/1/05	1/7/05	1/1/06	1/7/06	1/1/07	1/7/07	1/1/08	1/7/08
Brentwood	6.50	6.50	6.5	7.00	6.75	6.75	7.00	7.00	6.75	6.75	6.25	6.25	6.00	5.50	5.25	5.25
Basildon	7.00	7.00	7.0	7.00	7.00	6.75	6.50	6.50	6.75	6.50	6.50	6.25	6.00	6.00	5.75	6.00
Billericay	7.50	7.50	7.5	7.50	7.25	7.00	7.00	7.00	7.25	7.25	7.00	7.00	7.00	6.75	6.75	7.00
Blue Water	6.00	6.00	6.0	6.00	6.00	6.00	5.50	5.00	5.00	5.00	5.00	5.00	5.25	5.00	5.00	5.00
Chelmsford	5.75	5.50	5.5	5.50	5.50	5.50	5.50	5.50	5.50	5.25	5.00	4.75	4.75	4.75	4.50	4.75
Lakeside	4.75	4.75	5.0	5.50	5.50	5.50	5.50	4.75	4.75	4.75	4.75	4.75	5.00	5.00	4.75	5.00
Romford	7.00	7.00	7.0	7.00	7.00	6.00	5.50	5.50	5.50	5.50	5.50	5.00	5.50	6.00	5.50	5.50

Source: Valuation Office Agency – Property Market Report July 2008

5.29 Table 6 gives yields on prime retail properties in Brentwood town centre and other regional shopping centres taken from the Property Market Report prepared by the Valuation Office in July 2008 (attached at **Annex H**), the most recent version of the report. It reveals that yields on prime retail properties in Brentwood have improved steadily since January 2004 when they were 7%; they were 5.25% at last count in July 2008. In terms of the most recent values, Brentwood compares favourably to yields in Basildon (6%), Billericay (7%), and marginally better than Romford (5.5%) but it is also lags marginally behind yields on prime rental properties in Bluewater (5%), Chelmsford (4.75%) and Lakeside (5%). In comparative terms, Brentwood is therefore seen as a potential greater risk for investment than those centres but performs well overall. (NB: All this yield information pre-dates the current economic downturn. When more data becomes available it is likely that yields will have softened in all centres and, as a result figures need to be treated with considerable caution.)

Pedestrian Flows

5.30 Brentwood town centre is compact and can be traversed on foot within 15 minutes walk. It is formed along the A1023, also known as London Road, High Street or Shenfield Road and the majority of the centre’s shops face into this street. From our own observations the strongest footfall is to be found between the Baytree Centre / Chapel High and along the High Street to Millennium Walk which leads up to Sainsbury’s to the north. It should be noted however that footfall diminishes very little of the rest of the High Street, certainly along the section between Crown Street to the west and Wilsons Corner to the east.

5.31 It is unsurprising that the strongest footfall is found in and around the area between the Baytree Centre and Sainsbury's, at present these are the two main town centre anchors. Furthermore, they both contain substantial car parking in the form of Sainsbury's own car park and the Coptfold Road multi-storey car park adjacent to the Baytree Centre to the south. These parking facilities are used by the majority of visitors in addition to the William Hunter Way car park to the north of the High Street, also adjacent to Sainsbury's.

5.32 There are 507 car parking spaces at Sainsbury's supermarket, the largest car park in Brentwood. Patrons of Sainsbury's are allowed to park for up to three hours provided they spend more than £5 within the store. This gives rise to a large number of linked trips and drives footfall along Millennium Walk to the High Street where shopping can be continued elsewhere within the centre.

Accessibility

5.33 Brentwood is well placed within the regional road network, being situated adjacent to Junction 28 of the M25 where it meets with the A12. The proximity of Brentwood to the M25 means that much of south-east England is within an hour's drive of major airports such as Stansted, City, Gatwick, Luton and Heathrow and large shopping centres at Lakeside in Thurrock and Bluewater in Kent. In terms of surrounding centres, the A12 dual carriageway provides access to Romford to the south-west and Chelmsford to the north-east. In addition, the A129 gives direct access to Billericay, Wickford and Basildon to the south-east.

5.34 In terms of public transport, Brentwood Train Station connects the centre directly with several other towns such as Ingatestone, Billericay, Wickford, Southend, Chelmsford, Witham, Colchester and Ipswich. Trains also run to Liverpool Street Station in Central London with stops at Romford and Stratford where the new Westfield Shopping Centre is currently under construction. Rail connectivity to London and the wider south-east region is set to be improved in future with Crossrail due to open by 2018. The multibillion pound transport project will eventually connect Brentwood Train Station with Shenfield to the east and Heathrow Airport and Maidenhead to the west. The line will be part underground and part overground benefiting commuters who will no longer have to change at

London Liverpool Street to access the London Underground. The improved train service offered by Crossrail could potentially lead to more passengers using Shenfield and Brentwood stations. The resulting increase in footfall would benefit retail in surrounding local centres such as Warley Hill, Shenfield and Brentwood town centre.

5.35 Local and regional bus services connect Brentwood with surrounding local village centres as well as further afield to neighbouring towns including Billericay, Chelmsford and Romford. Responses to consultations have highlighted dissatisfaction among local residents with the low frequency of bus services to surrounding rural locations, particularly during the evening and on Sundays[19]. As well as making it difficult for those without access to a car to go shopping or out for an evening, this could have an adverse affect on retail and leisure in Brentwood if fewer people can access the town centre during these hours, particularly the night time economy.

Perception of Safety and Occurrence of Crime

5.36 From our own observations there appear to be no obvious signs of crime within Brentwood town centre, there is little or no graffiti or vandalized property for example.

Table 7: Incidence of Crime April 2009 – March 2010

Category	Brentwood		Essex		England and Wales	
	Offences Recorded 09/10	Offences per 1,000 Pop 09/10	Offences Recorded 09/10	Offences per 1,000 Pop 09/10	Offences Recorded 09/10	Offences per 1,000 Pop 09/10
Violence Against the Person	790	11	21,261	12	856,832	16
Sexual Offences	37	1	1,266	1	53,757	1
Robbery Offences	26	0	1,096	1	74,413	1
Burglary of Dwelling	435	6	6,849	4	268,591	5
Theft of a Motor Vehicle	177	2	3,442	2	117,546	2
Theft from a Motor Vehicle	315	4	8,329	5	336,865	6
Interfering with a Motor Vehicle	17	0	879	1	37,928	1

Source: Office for National Statistics

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5.37 Table 7 above compares the levels of crime within Brentwood Borough with those of Essex and England & Wales for the financial year 2009/10. The information is taken from the Office of National Statistics and is police recorded crime data. The data does not show the true extent of household and personal crime because it excludes crimes that are not reported to the police. However, these statistics provide a good measure of trends in well-reported crimes, and can be used for local crime pattern analysis.

5.38 Table 7 shows that Brentwood Borough has lower crime rates than both the County of Essex as a whole and England & Wales across the majority of the given crime categories. The exception in this instance is the 'Burglary of Dwelling' category where there are more crimes committed per 1,000 people in Brentwood than both Essex and England/Wales. An explanation for this might be the prevalence of affluent residents within the borough with large houses that are attractive targets for criminals, as shown within the Socio-Economic section of the Town FOCUS Report for Brentwood attached at **Annex F**. In terms of Mosaic Consumer Classifications, the report shows that there are more than double the proportion of 'Symbols of Success' living within the town of Brentwood than on average, 26% as opposed to 10% nationally.

Town Centre Environmental Quality

5.39 Brentwood's town centre has recently undergone a £7 million improvement and today benefits from an attractive and pleasant town centre environment. The public realm is now characterised by high quality building materials and street furniture. Efforts have been made to reduce the volume and speed of traffic passing through the High Street by signposting diversions through surrounding roads and measures such as shared surfacing and lower curbing. Together with the introduction of wide public pavements, these improvements mean the town centre is now a pleasing environment within which to shop, meet and socialise.

5.40 The improvement works began in 2007 with the formation of the Brentwood Town Centre Renaissance Group, set up to establish and promote the broader vision for the town centre as part of the Essex Exemplar programme. The aims of the group were to establish the wider vision for Brentwood town centre, provide leadership for achieving the vision and for delivering/enabling a range of improvement projects to enhance the town centre environment.

5.41 Brentwood Town Centre Vision, published by the Essex Design Initiative in 2008, provides views on the town centre from the Renaissance Group's Landscape Design, Public Art and Urban Design teams. It was subsequently followed by the Brentwood Town Centre Regeneration Strategy adopted in May 2010 as part of the local development plan evidence base.

5.42 Work to revitalise the High Street to date has delivered:

- An entirely reconstructed 600 metre surface along the High Street;
- High quality design using quality materials such as granite;
- Improvement of adjoining shopping streets;
- Enhancement junctions to reduce congestion;
- Improved pedestrian crossing points;
- Enhanced bus waiting areas with real time information; and
- Reduced congestion through the creation of an effective bypass around the High Street.

5.43 Further discussions are underway with key partners over a longer term programme of enhancements which will follow the delivery of this initial High Street Scheme. As the above information demonstrates, the quality of Brentwood's town centre environment is high and set to improve yet further.

Conclusions on Brentwood

5.44 From the evidence above, Brentwood town centre seems to be performing well. In terms of the level of vacant street level property, one of the best indicators of the existing vitality and viability of any centre, Brentwood is well below the national average at 8% compared with 13% nationally. Considering the size of the town centre which contains over two hundred and fifty retail units, the probability of this data being an accurate reflection of its actual health is extremely high.

5.45 Brentwood benefits from a diverse retail mix. There is an obvious cluster of interior design specialists within the town and together with several complimentary interiors and homewares retailers they give Brentwood's retail offer a unique homewares and furniture offer. The same can be said of the many restaurants and bars in the centre which mean Brentwood has a thriving night time economy. However, it should be noted that there is room for improvement.

The level of comparison goods retailers, often the hallmark of the most popular retail destinations, could be increased for example. Brentwood Borough Council is currently looking into ways to further the provision of night time activities within the centre and working towards gaining Purple Flag status in the future. Once completed, the William Hunter Way development, which will include a six screen cinema, will only add to this existing strength.

5.46 Within the Borough there is very little edge-of-town and out-of-town retail competing with Brentwood town centre. Warley Hill and Shenfield are close but as outlined above both are local service centres which for the most part provide services and convenience goods retailing to local residents and workers rather than performing a higher retail function and as such provide little competition. Within the south-east region, however, several towns and dedicated shopping centres compete directly with Brentwood for comparison retail expenditure, for example, Basildon, Billericay, Chelmsford, Romford and the shopping centres of Bluewater and Lakeside. Competition amongst the centres has recently become more intense with the opening of the new Westfield Shopping Centre in Stratford City. Built as part of the regeneration of Stratford for the 2012 Olympic Games, the facility is Europe's largest urban shopping centre at 1.9 million square feet. Faced with such competition, it is important for Brentwood to distinguish itself from rival centres and offer a multitude of different retailers, services and leisure facilities to attract a broad demographic of visitors.

5.47 Brentwood benefits from a high level of public transport provision and is well placed within the regional road network being situated close to the junction of the M25 and A12. However, although this accessibility and connectivity benefits Brentwood residents, it also makes travelling around the region to rival towns and shopping centres easier. This emphasises the need for the centre to distinguish itself in a way that will continue to attract shoppers and other visitors, maintaining a distinctive offer in a high quality and accessible public realm.

5.48 In terms of retailer representation and demand Brentwood produces mixed results. The level of national multiple retailers within the centre is lower than several competing centres but it performs much better in terms of the level of retailer demand, comparing favourably with the majority of these same centres. Added to this, yields for prime retail properties in Brentwood town centre are lower than all the surrounding town centres with the exception of Chelmsford.

5.49 Brentwood's town centre environment has been through a renaissance of sorts in recent years with investments in the physical fabric of the High Street and its street furniture. The High Street now has an open and accessible feel, it does not suffer from the clutter of ornaments and street furniture common in high streets of many comparable towns and is clearly well maintained and clean. This coupled with the apparent low levels of vandalism and graffiti means Brentwood's town centre environment is now exemplar. Several traffic calming and minimising measures have been introduced which, together with the widening of pavements, have made shopping here an extremely pleasurable experience.

5.50 Brentwood town centre is currently performing well in testing economic conditions; there are threats to the ongoing success of the centre but also opportunities for further enhancements. On balance it is considered that the centre is both vital and viable and is therefore in good health.

Warley Hill, Brentwood Station Area

5.51 Located south of Brentwood town centre along Kings Road (B186) is the small local centre of Warley Hill, which is based around Brentwood Train Station and has retail units stretching out a few hundred metres along Kings Road to the north and south of the station.

Diversity of Uses

5.52 Based on our own street surveys, there are currently 63 units trading in the Warley Hill local centre on a total of 4,995 sq m (53,765 sq ft) of ground floor retail floorspace, the composition of which is shown in Table 8 overleaf.

5.53 The centre is clearly subordinate to Brentwood and for the main comprises service units such as restaurants, takeaways and hair and beauty salons serving local residents. Comparison units, in contrast, are limited. However, in this regard the centre does serve a valuable function as several independent comparison goods retailers are located here who might otherwise not be able to afford to rent space within Brentwood. These trends are reflected in the distribution of uses: almost half (49%) of units comprise service sector retailers, much greater than the national average of 35% and only 22% of units comprise comparison goods retailers compared with 42% on average nationally.

Table 8: Uses in Warley Hill Centre

Category	Number of Units	%	National Average (%)	Amount of Floorspace (sqm)	%	National Average (%)
Convenience	7	11	9	549	9	17
Comparison	14	22	42	907	18	47
Service	31	49	35	2,712	54	23
Miscellaneous	4	6	1	314	1	1
Vacant	7	11	13	513	10	11
Total	63	-	-		-	-

Source: Chase & Partners Street Survey August 2011

5.54 The level of convenience goods retailers is above the national average at 11% compared with 9% nationally; this is not surprising given the nature of the local centre often typified by above average levels of convenience stores. Furthermore, the presence of the train station and several office blocks in and around Warley Hill invariably benefits local convenience stores, whose presence should be considered a strength as they bring in customers and expenditure to the centre on a continuous basis. Equally, the importance of these convenience stores to local office workers and commuters should not be underestimated, who would otherwise have to walk a relatively long way into the centre of Brentwood in order to buy food and other daily necessities. In this regard the offices share a symbiotic relationship with retailers within Warley Hill, each benefiting from the others' presence within the centre.

5.55 The distribution of floorspace between the four categories roughly mirrors the unit distribution. There are well above average levels of service floorspace and well below average levels of comparison floorspace.

Retail Floorspace in Edge-of-Centre and Out-of-Centre Locations

5.56 Warley Hill local centre is situated within five minutes walk of the main Brentwood shopping centre. As previously stated it is subordinate to the main centre providing services and convenience retail to local residents in the main.

Potential Capacity for Growth

5.57 The centre is characterised by small parades of retail units interspersed by apartment blocks, rows of semi-detached houses, offices as well as the station and railway line. Because of these physical constraints the potential growth of the centre is limited. The station car park would be an obvious location for future development. That said, considering the close proximity of the centre to Brentwood High Street, it would be detrimental to the main town centre to locate any substantial retail development here.

Retailer Representation and Demand

5.58 As shown in Table 4 above, just two national multiple retailers are present within the Warley Hill area constituting 3.2% of the total number of units. This is a much lower rate for multiples than the UK national average of 31.1% and is indicative of the centre's modest appeal. A schedule of national multiple retailers within Warley Hill is shown in **Annex I** and a map showing their distribution in the Appendices, **Plan 4**.

5.59 Unfortunately, information is not available on the level of retail demand for space in Warley Hill. However, it is fair to say that in this regard it will undoubtedly benefit from being effectively an extension of the main Brentwood town centre. Furthermore, should a suitable unit become available within Warley Hill some national multiple retailers might wish to locate there considering the centre is part of Brentwood town.

Proportion of Vacant Street Level Property

5.60 According to our street survey, there are currently seven vacant units within Warley Hill centre representing some 11% of the total. This is less than the national average of 13%. With a relatively low vacancy rate, Warley Hill is proving to be a robust centre, especially considering the current economic difficulties faced by retailers and consumers alike.

5.61 **Plan 5** (in the appendices) shows the distribution of vacancies throughout Warley Hill. There appears to be no grouping of vacant units which would suggest that there are no failing parades or areas within the centre.

Pedestrian Flows

5.62 Brentwood Train Station is the main focal point for pedestrian footfall within Warley Hill. Busiest during the commuter rush in the mornings and evenings, there is a steady stream of pedestrians here throughout the day. Warley Hill centre can be traversed by foot within a matter of minutes and there is a small trickle of pedestrians along Kings Road throughout the day.

Accessibility

5.63 In terms of accessibility, Warley Hill benefits from the same extensive public transport system as Brentwood, discussed above. As with Brentwood, access to public transport within Warley Hill is set to improve in future with the planned opening of Crossrail in 2018, this new service potentially bringing more commuters to the station and thus increasing commuter expenditure within Warley Hill. This is also true in terms of good access to the local and strategic road network.

Perception of Safety and Occurrence of Crime

5.64 From our own observations, Warley Hill appears to be a safe and crime free centre; there are no obvious signs of vandalism such as graffiti or damaged property although we noted that some buildings are in need of investment as discussed below. As stated above, Brentwood Borough benefits from a lower than average crime rate, below that for both Essex and England and Wales.

Town Centre Environmental Quality

5.65 In general the quality of the buildings within Warley Hill are reasonable, there are no buildings in disrepair or dereliction but some would benefit from investment to improve their appearance. The pavements are a little narrow and vehicular traffic can dominate the centre at rush hour. However, there are a number of pedestrian crossings throughout the centre which help address this issue and the streets are clean and appear to be well kept.

Conclusions on Warley Hill

5.66 On balance of the evidence above, it would appear that Warley Hill is a successful local centre. The vacancy rate within the centre is lower than the national average which is a strong indicator of not only its health but also the important role it plays. A service centre in the main, Warley Hill provides an affordable alternative to Brentwood town centre for independent retailers from all categories. The retail elements of the centre are interspersed with residential properties, offices and Brentwood train station. As such the centre undoubtedly serves not only local residents from the surrounding area and visitors passing through along Kings Road, but also commuters who use the train station each day and staff based within the many offices in the area. The continuous source of additional retail expenditure brought into the centre by commuters and office workers should be considered a real strength of the centre and has helped abate the worst effects of the economic downturn of recent years.

5.67 The centre is formed along a main road into Brentwood town centre and the vehicular traffic that uses it has a detrimental effect on the shopping environment. That said Warley Hill is reasonably well maintained, kept clean and free from pockets of deprivation or failing parades.

5.68 Overall it is considered that Warley Hill plays a limited but important role within the hierarchy of Brentwood Borough's retail centres, it fulfils that role successfully and as such is both vital and viable and in good health.

Ingatestone

5.69 Ingatestone is located roughly three miles north-east of Brentwood along the A12. The village is linear in shape and the retail element is formed in a long thin ribbon which lines the High Street known as Roman Road or the B1002. A popular place to live for commuters who work in London, Ingatestone is an affluent village typified by a pleasant local character, large detached houses, and a train station. The village centre is characterised by period buildings which highlight its historic past and make for a pleasing aesthetic and built environment. The village was first formed in Saxon times on the Essex Great Road (former A12) that runs between London and Colchester, and predates the town of Brentwood.

Diversity of Uses

5.70 Based on our own street survey conducted in August 2011 there are currently 62 retail units trading within Ingatestone village centre as shown in Table 9 below:

Table 9: Uses in Ingatestone Village Centre

Category	Number of Units	%	National Average (%)	Amount of Floorspace (sqm)	%	National Average (%)
Convenience	7	11	9	1,545	22	17
Comparison	25	40	42	2,383	34	47
Service	21	34	35	2,266	33	23
Miscellaneous	6	10	1	538	8	1
Vacant	3	5	13	197	3	11
Total	62	-	-	6,929	-	-

Source: Chase & Partners Street Survey August 2011

5.71 In total seven units contain convenience retailers constituting 11% of the total stock, greater than the national average of 9%; 25 contain comparison good retailers constituting 40% of the total which is marginally less than the national average of 42%. There are 21 service retailers within the centre equating to 33% of the total which is a slightly lower level than the 35% national average. In terms of the distribution of floorspace between the various goods categories, there is a similar pattern to the distribution of units within each goods category as would be expected. The exception to this is the level of convenience goods floorspace, which at 22% is double the level of units at 11%.

5.72 Overall the distribution of uses within Ingatestone is characteristic of a local service and convenience centre which provides local residents with services and caters for their day to day retail needs. This would seem to be confirmed by the findings of the Quantitative Data – see **Section 7** for further information.

Retail Floorspace in Edge-of-Centre and Out-of-Centre Locations

5.73 Ingatestone is a large village, both the village as a whole and the retail element contained within it are focused on the High Street as stated above. Practically the entire village is within walking distance of the centre negating any demand for edge-of-centre or out-of-centre retail floorspace.

Potential Capacity for Growth

5.74 As with Warley Hill the retail element of Ingatestone village centre is interspersed with residential development, mainly detached and semi-detached houses. As such there is virtually no underdeveloped land within the centre which could be redeveloped.

Retailer Representation and Demand

5.75 As Table 4 above shows there are nine national multiple retailers within Ingatestone constituting 14.5% of the total, less than half of the national average of 31.1%. This would seem to indicate that national multiple retailers have a limited interest in the centre. A review of current retailer requirements for space on Focus, Perfect Information Property and Shop Property databases indicated that only one retailer is currently seeking space within Ingatestone, the variety retailer Boyes. This may not reflect the true level of interest, since, as stated above, the search excludes many retailers who have nationwide requirements for floorspace who might look to Ingatestone as a promising location if the right type of unit became available.

5.76 **Annex J** and **Plan 6** respectively contain a schedule and map of national multiple retailers present within Ingatestone. With the exception of the Santander and Barclays banks, the most recognisable retailers are the Budgens and Cooperative food stores which also occupy the two largest units to the north of the High Street. National multiple retailers are spread evenly throughout the centre as shown by **Plan 6**. The centre of Ingatestone is relatively small as stated above, and it is possible to walk the length of the High Street within 10 minutes. This undoubtedly has an influence over the distribution of multiple retailers who might consider it more important to have an appropriate unit rather than a central location.

Proportion of Vacant Street Level Property

5.77 Judging by our own street survey, there are presently three vacant retail units within Ingatestone constituting merely 5% of the total stock. Their location is shown on a map in **Plan 7**.

5.78 With such a small number of vacant units within the centre it would make little sense in trying to read a great deal into the pattern of their distribution. Considering the low number of vacancies together with the even distribution of national multiple retailers throughout the centre, there would appear to be no failing parades or areas of weakness within the centre.

Pedestrian Flows

5.79 At the time of our visit to Ingatestone, the level of pedestrian movement throughout the centre was extremely low, almost certainly affected by poor weather and the fact it was midmorning during school term-time. With that in mind the weight given to our observations should be tempered. There appeared to be a reasonably even distribution of pedestrians throughout the centre, a moderate increase in numbers between the main town centre bus stop and The Cooperative and Budgens food stores along the High Street to the north.

Accessibility

5.80 In terms of accessibility, Ingatestone benefits from access to nearly the same level of public transport as Brentwood. It has a railway station, as stated above, although trains to London run less frequently than from Brentwood and Shenfield. Buses also link Ingatestone with the centres of Brentwood and Chelmsford. Ingatestone is well placed within the local and regional road network being bypassed by the A12 and less than five miles from Junction 28 of the M25.

5.81 In terms of car parking within the centre, options are limited although there is adequate quantity. There is a 22 space pay-and-display car park off Market Place and a further circa-80 space pay-and-display car park located behind the Ingatestone and Fryerning Community Association building, although parking there is only allowed between the hours of 6am and 6pm. Market Place car park was reasonably full at the time of our visit, which as stated above was a weekday morning. It is therefore reasonable to assume that it is busy the majority of the time. Elsewhere the High Street is too narrow to enable any significant level of parking at the side of the road although there are some short stay/drop off parking bays and also additional on street parking on some side-roads such as Bell Mead.

Perception of Safety and Occurrence of Crime

5.82 Again as with Brentwood and Warley Hill, Ingatestone appears to be a safe and crime free centre. There are no obvious signs of vandalism such as graffiti or damaged property. As stated previously, Brentwood Borough benefits from a lower than average crime rate than both for Essex and England and Wales.

Town Centre Environmental Quality

5.83 Ingatestone village centre is typified by small well maintained retail units of period design which makes for an attractive setting. The centre is to some extent dominated by car traffic as it is formed along a road and the pavements are not substantial. That said, the A12 dual carriageway effectively acts as a bypass around the village meaning that mainly local traffic uses the High Street limiting the negative effect on shoppers. Overall, it is considered that Ingatestone has a pleasant environment conducive to shopping.

Conclusions on Ingatestone

5.84 On balance of the evidence above, Ingatestone would appear to be in reasonable health: the vacancy rate is extremely low, the village centre environment is pleasant and there are no visible indicators of crime. It is primarily a local convenience and service centre with above average levels of convenience retailing and average levels of service retailing, also there are only a limited number of national multiple retailers which is another characteristic of such centres. Nonetheless, it provides an important retail destination for local residents and therefore has a vital role to play within the Borough's retail hierarchy. We consider the centre to be both vital and viable and as such in a good state of health.

Shenfield

5.85 Shenfield village centre is situated roughly three quarters of a mile north-east of Brentwood along the A1023 (Shenfield Road). As with Ingatestone and Warley Hill the centre is formed along a single street, the A129 also known as Hutton Road, and runs between Shenfield Train Station to the east and the junction with

Shenfield Road to the west. The station is an important commuter hub providing the Borough's only fast train service to London Liverpool Street Station. Shenfield was once a historic village but, along with the adjacent village of Hutton, it now forms part of the wider Brentwood urban area.

Diversity of Uses

5.86 Based on the Goad centre report and our street surveys there are currently 90 units trading in Shenfield on a total of 9,838 sq m (105,895 sq ft) of retail floorspace – see Table 10 below. There are 14 convenience units in the centre equating to 16% of total stock, almost double the national average of 9%. This is due to the presence of several independent food retailers such as Road Fisheries (fishmongers), N.A.Manning (greengrocer) and Roses (baker); in addition there is both a Cooperative food store and a Tesco Express within the centre.

Table 10: Uses in Shenfield Town Centre

Category	Number of Units	%	National Average (%)	Amount of Floorspace (sqm)	%	National Average (%)
Convenience	14	16	9	1,786	18	17
Comparison	26	29	42	4,248	43	47
Service	43	48	35	3,143	32	23
Miscellaneous	2	2	1	127	1	1
Vacant	5	6	13	534	5	11
Total	90	-	-	9,838	-	-

Source: Chase & Partners Street Survey August 2010

5.87 There are 26 comparison units within Shenfield representing only 29% of the total, much less than the national average of 42% although fairly typical for a centre of this size and order. The centre is clearly dominated by service sector retailers which occupy 48% of the units and 32% of floorspace. Overall, figures indicate that Shenfield is fairly typical for a centre of its size in terms of all three categories.

Retail Floorspace in Edge-of-Centre and Out-of-Centre Locations

5.88 There is hardly any edge or out-of-town centre retailing within Shenfield, the exceptions being two small local shopping parades on Rayleigh Road and

Woodland Avenue within Hutton, east of the main centre. As with Warley Hill, the centre is very much the subordinate neighbour of Brentwood town centre.

Potential Capacity for Growth

5.89 The potential for growth within Shenfield is limited. As with Warley Hill and Ingatestone retail is interspersed with residential development and as such there is very little underdeveloped land within the centre. Shenfield Motor Centre and car lot at the western end of the centre does represent one possible site with potential for redevelopment. Shenfield also presents a clear opportunity for the piecemeal redevelopment of some older units within the centre which are now dated and of limited architectural merit with poor servicing arrangements. The redevelopment of such units should be encouraged.

5.90 The arrival of Crossrail in the future, discussed below, will bring additional expenditure to Shenfield. This in turn may give rise to additional demand by retailers for space within the centre. The intensification of existing retail facilities within Shenfield Train Station may be one solution to this.

Retailer Representation and Demand

5.91 **Annex K** contains a schedule setting out national multiple retailers currently represented in Shenfield town centre across a variety of goods categories. There are in total 15 national multiple retailers within Shenfield constituting 17% of the total as shown by Table 4 above; this is just over half the national average of 31.1% which should be considered a weakness of the centre.

5.92 Attached as **Plan 8** within the Appendices is a map showing the distribution of national multiple retailers throughout Shenfield town centre. It shows that the majority of national multiple retailers are found towards the eastern end of the centre near to Shenfield Train Station. The future arrival of Crossrail will reinforce this pattern further as potentially more commuters use the station each day increasing the importance of locating towards this end of Hutton Road.

5.93 Focus does not produce a Town FOCUS Report on Shenfield. As such Chase and Partners have conducted an ad hoc search using Focus, Perfect Information Property and Shop Property databases, as was undertaken for Ingatestone in order to determine which retailers are currently seeking to locate within the centre. From this research it has been determined that there are currently two retailers seeking representation within Shenfield: Simply Eat and Aldi.

Proportion of Vacant Street Level Property

5.94 As Table 10 above shows, there are currently five vacant units within Shenfield town centre equating to 6% of the entire stock. This is less than half of the average level of vacant units nationally and should be considered an indicator of the centre's strength in the present difficult market. As noted above, the level of national multiple retailers within Shenfield is below average and demand for space within the centre from new retailers is limited. However, it would seem that there remains a strong base of independent retailers who appear to be thriving here. **Plan 9,** (in the appendices), shows the distribution of vacant units within Shenfield. The even distribution of vacant units throughout the centre would appear to indicate that there are no failing parades or areas of weakness within the centre.

Pedestrian Flows

5.95 From our own observations it would appear that the strongest footfall is found between Shenfield Station and Friar's Avenue, not surprising given it is also the area with the highest proportion of national multiple retailers. Elsewhere within the centre there appears to be a fairly even steady flow of pedestrians, perhaps because it is relatively small and can be traversed by foot within 10 minutes.

Accessibility

5.96 As with Brentwood and Ingatestone, Shenfield benefits from a high level of access to public transport. Shenfield Train Station connects the centre directly with several of the major regional centres such as Brentwood, Billericay, Southend-on-Sea, Romford as well as being the Borough's fast train connection to central London. This rail connectivity with London will increase once Crossrail opens in future. Bus services connect Shenfield with the centres of Brentwood, Basildon, Billericay and Wickford.

5.97 In terms of the local and regional road network, Shenfield is well connected to the nearby centres of Brentwood, Basildon, Billericay, Chelmsford and Ingatestone via various A-roads. The centre is only three miles away from Junction 28 of the M25

Motorway meaning that London and many destinations within the wider South-East region are both within an hour's drive.

5.98 In terms of car parking, there is an NCP pay-and-display car park at Shenfield Train Station which holds up to 461 vehicles and also a smaller car park on Friars Avenue off Hutton Road. Cycle storage and sheltered cycle storage are provided within the station car park and train station. These facilities are very popular with commuters, so much so that existing cycle storage facilities appeared to be close to capacity at the time of our visit. Additional secure cycle parking could be encouraged to promote sustainable travel to and from the station. The station car park and cycle storage facilities will undoubtedly provide parking provision to some shoppers who visit the centre as well as commuters. There is a limited amount of pay-and-display car parking along Hutton Road.

5.99 It is clear given the above information that as with the other main centres within Brentwood Borough, Shenfield benefits from a high level of accessibility.

Perception of Safety and Occurrence of Crime

5.100 As previously outlined (see Table 7), the Borough benefits from lower crime levels than Essex as a whole or nationally across England and Wales. From our own observations there appear to be very few examples of vandalism within the centre in terms of graffiti or damaged property. On the evidence that is available, it appears that crime is not a major issue within Shenfield which should be considered a strength of the centre.

Town Centre Environmental Quality

5.101 As stated above there is very little vandalised property within Shenfield, the centre is clean and the presence of street trees and hanging baskets along Hutton Road are a pleasant addition. The majority of buildings within Shenfield centre are a little dated and of limited architectural merit or historic value, although that is not to say they are in any kind of disrepair. In general the physical fabric of Hutton Road and the majority of street furniture are beginning to show evidence of wear and tear. The centre would benefit from similar revitalisation works to those which have taken place in Brentwood recently.

5.102 On balance Shenfield’s environment should be considered neither a detriment to nor a strength of the town centre; there is, however, a clear opportunity for its revitalisation through improvements to the physical fabric.

Conclusions on Shenfield

5.103 As with Ingatestone and Warley Hill, Shenfield town centre appears to be performing well under the pressure of the current subdued retail climate as illustrated by the extremely low level of vacant units. The above average levels of services and convenience goods retailers are perhaps the reason for this as expenditure on these essentials does not tend to fall quite so dramatically as more expensive comparison goods at this point of the economic cycle. Furthermore the centre is clean, appears to be free from crime and is accessible by a number of means of transport. Indeed this accessibility is set to improve further once Crossrail opens in future.

5.104 Shenfield would benefit from investment in the physical fabric of Hutton Road and street furniture, beyond this it is hard to see what further improvements would benefit the centre which is operating successfully as a local service and convenience destination. In that context, Chase and Partners consider Shenfield town centre to be both vital to the local community and viable and as such it is considered to be in good health.

6. Assessment of Local Centres, Parades and Individual Shops

6.1 In addition to considering the vitality and viability of the four centres of Brentwood, Warley Hill, Shenfield and Ingatestone, Chase & Partners undertook a qualitative assessment of the network of village centres, local centres, retail parades and individual shops which are scattered throughout the Borough. **Plan 10** contains a map showing their respective locations. They are as follows:

- Blackmore – Blackmore Village Centre
- Brentwood – No. 245-267 Ongar Road
- Brentwood – Brook Street Post Office, Brook Street
- Doddinghurst – Church Lane
- Doddinghurst – Doddinghurst Post Office, Doddinghurst Road
- Herongate – Herongate Post Office, Brentwood Road
- Hutton – No. 1-23 Eastham Crescent
- Hutton – No. 200-216 Rayleigh Road
- Hutton – No. 60-74 Woodland Avenue
- Hutton – Hanging Hill Lane Post Office, Hanging Hill lane
- Kelvedon Hatch – Blackmore Road
- Kelvedon Hatch – Kelvedon Common Post Office, Church Road
- Pilgrims Hatch – Danes Way/Hatch Road
- Pilgrims Hatch – No. 2-8 Harewood Road
- Pilgrims Hatch – Ongar Road
- Stondon Massey – Stondon Post office, Ongar Road
- Warley – The Keys, Eagle Way
- West Horndon – No. 1-7 Chafford Gardens
- West Horndon – No.179-189 Thorndon Avenue

6.2 Given the relatively modest size of these small village/ local centres and retail parades, let alone individual shops, there is very little information available on many of the more detailed indicators referred to in the previous chapter (e.g. Zone A rents, yields and retailers' requirements). Chase & Partners has, nonetheless, endeavoured to provide a considered appraisal of the role played by these facilities and provide an objective assessment of their contribution to the local area and retailing within the Borough generally. Chase and Partners undertook a site visit to the respective locations in November 2010.

(i) Blackmore – Blackmore Village Centre

6.3 Situated within the very north of the Borough's rural hinterland, Blackmore is an attractive small village, the centre of which comprises a couple of shops including a post office, a tea room and a pub based around a pleasant village green. There are no vacant premises within the centre, it appears to be clean, well maintained and free from signs of crime such as vandalism or graffiti and the period properties here make for a pleasing aesthetic. The few retailers will primarily cater for those living and working in the village and surrounding area, although they appear to be providing an in demand service.

(ii) Brentwood - No. 245-267 Ongar Road

6.4 Formed along Ongar Road, this parade of 11 shops and one public house located on Ongar Road (A12) to the north of Brentwood town centre is a sizeable local centre. Located within the centre are a building equipment hire shop, locksmith, pharmacy, hairdresser, McColl's convenience store, Chinese and Indian takeaways, a florist, betting office, a small specialist furniture store and a public house. There is one vacant unit within the centre representing less than 10% of the total stock, less than the present national average. The centre has a diverse retail mix which should be considered a strength. The public house appears to be popular and will act as an important local social hub.

6.5 To the front of the main parade there is on street car parking for eight vehicles, perhaps inadequate given the number of shops located here, although the surrounding residential roads have limited parking restrictions so represent a viable alternative for visitors to the centre. Ongar Road is a main road and as such will be used by a large volume of traffic on a daily basis increasing the catchment of the centre. The main parade consists of a number of small clusters of units as opposed to one continuous line; the buildings are a little dated and beginning to show their age.

6.6 This small local centre is set within a large residential area in the north of Brentwood town, there is a good retail mix, below average levels of vacancy and at the time of our visit was busy. On balance the centre is considered to be both vital for the local community and viable as a retail destination.

(iii) Brentwood – Brook Street Post Office, Brook Street

6.7 Brook Street Post Office is situated on the main road into Brentwood town centre from Junction 28 of the M25. The road is naturally busy meaning that as well as serving the local residents from the surrounding area, the shop will also serve road users passing by. However, the high levels of traffic using the main road dominate the general environment of the immediate area to the detriment of the shopping experience.

6.8 The post office is twinned with a Londis convenience store, both operating from within the same premises, as such the store offers a broad range of goods and services to customers.

6.9 Adjacent to Brook Street Post Office are two out-of-town retail warehouse units, Topps Tiles and Wickes Home Improvement Centre units, both discussed within the previous chapter. A public house 'The Bull' is located in the close vicinity of the post office. The pub is well maintained and given its period nature gives a pleasing aesthetic.

(iv) Doddinghurst – Church Lane

6.10 Situated roughly two to three miles directly north of Brentwood town, Doddinghurst is a small village within the rural hinterland to the north of the Borough close to the border with Epping Forest District. Retail within the centre is formed along Church Lane, which has a parade of seven shops set back from the road side with car parking to the front. The parade comprises six small units which contain the kind of service and convenience retailers typically found within rural village centres such as Doddinghurst: a newsagents, hairdressers, dry cleaners, pharmacy and off licence. Within the same parade there is also a Budgens convenience food store. Further along Church Lane are two further units which contain a fast food takeaway and a miscellaneous goods store.

6.11 In general Doddinghurst village centre is very pleasant, the retail units are a little dated but functional and well maintained. The centre is very green with many street trees as well as those found within the front gardens of houses and the playing fields on the opposite side of Church Lane. There are no signs of crime or vandalism within the centre and no vacant units. The car park to the front of the main retail parade has approximately 30 spaces which together with the potential on street car parking along Church Lane mean that the centre benefits from adequate parking provision.

6.12 Given the above, Chase and Partners consider that the retail centre of Doddinghurst is providing a vital service to those who live and work within and around the village. Furthermore, it contains a number of local service and convenience retailers and has a pleasant environment making it an attractive destination for shoppers.

(v) Doddinghurst – Doddinghurst Post Office, Doddinghurst Road

6.13 Doddinghurst post Office is a small standalone shop located on Doddinghurst Road a few hundred metres south of the main shopping parade on Church Lane. The shop is very small, although in addition to the post office function it also serves as a small grocer, off licence stationer and general convenience store. It is fair to say, however, that without the post office function, the shop would find it difficult to compete with the retailers on Church Lane. The post office will undoubtedly serve local Doddinghurst residents in the main considering that there are also Post Offices at Stondon Massey and Kelvedon Common.

(vi) Herongate – Herongate Village Stores, Brentwood Road

6.14 Herongate is located within the south of the Borough a few miles south of Brentwood town centre. The village is formed in a linear fashion along the A128 (Brentwood Road) which the post office faces onto. Herongate Village Stores also acts as a post office as well as a convenience goods store selling a range of goods including stationery, fresh vegetables, other general foodstuffs, alcohol/tobacco, newspapers and magazines. In addition, there is a village notice board at the store and sales/letting particulars for numerous local houses are also displayed.

6.15 The store will mainly serve local village residents within Herongate. Being situated on a main road it would also be expected to serve some of the numerous people passing through the village on a daily basis.

(vii) Hutton – No. 1-23 Eastham Crescent

6.16 The Eastham Crescent shopping parade is located within the south of Brentwood roughly a mile south-east of the main town centre. There are a total of eight units within the parade of which two are currently vacant; the remainder contain typical service and convenience retailers such as a takeaway, pharmacy, newsagent, food store and betting office; there is also a post box within the parade.

6.17 The surrounding area is predominantly residential although the parade is located opposite a small public green space which makes for a pleasant outlook. The units themselves are showing signs of age and in need of refurbishment, at least to the external frontages. The two vacant units are boarded up and there is damage to the signage above. In general it is fair to say the parade would benefit from investment. In terms of car parking, there is off-street provision for roughly 20 vehicles to the front and side of the parade. Surrounding roads do not have parking restrictions meaning more vehicles can park close to the shops.

6.18 The Eastham Crescent parade is aging and in need of investment, it will serve only local residents from the surrounding residential area in the main as it is located away from any main roads. However, it lies adjacent to a pleasant public green space and will be a focal point for the local community providing an important local retail service.

(viii) Hutton – No. 200-216 Rayleigh Road

6.19 Located within Hutton north-east of Shenfield town centre along Rayleigh Road (A129), this small local centre is formed of two parades of shops and a standalone pub. One parade comprises seven retail units and is located on the north side of Rayleigh Road occupying numbers 198-216; the other comprises five units and is located to the south of the road occupying numbers 201-211. There is a few hundred metres distance between the two parades.

6.20 Nos. 198-216 includes a number of retailers typically found in such local centres: a news agents/convenience store, butcher, florist and dry cleaner; there are also some more specialist retailers such as an auto parts shop and a computer repair centre. Off street parking to the front of the parade provides sufficient space for shoppers, furthermore there are no on-street parking restrictions on the surrounding road network. The units are in a reasonable state of repair although are a little dirty and would benefit from a partial renovation.

6.21 Nos. 201-211 contains a small cooperative food store and pharmacy, a dentist as well as a home interior and electrical stores. The Cooperative food store is undoubtedly the main attraction of the parade although the pharmacy and dentist will also serve important local functions. Off street car parking is provided to the front of this parade of shops and a post box is also located there.

6.22 These parades lie within the heart of a sizable residential area and will benefit from the large population within the immediate vicinity. In addition since the parades are also situated on the A129, a busy main road which links Shenfield and Brentwood with Billericay and Basildon, retailers will benefit from additional expenditure from the large volume of traffic passing by each day.

6.23 This small local centre appears to be in good health, there are no vacant properties here, and at the time of our visit was busy. Considering there are no alternative or competing local centres within close proximity, the centre clearly fulfils an important retail role for local residents and Chase and Partners consider it to be both vital and viable.

(ix) Hutton – No. 60-74 Woodland Avenue

6.24 This is a purpose-built shopping centre with residential flats/maisonettes above in the heart of a residential area. It comprises a parade of nine units including a Cooperative Convenience Store together with hairdressers, Post Office, bakery, drycleaners, blinds and bathroom specialists and Chinese and Indian takeaways. There were no vacancies at the time of the visit and, although quiet, it clearly provides a good range of local services and appears to be a popular local shopping destination.

(x) Hutton – Hanging Hill Lane Post Office, Hanging Hill Lane

6.25 This is a small standalone post office unit within a residential area. Although small, the post office also serves as a convenience store, newsagent and off licence. There is sufficient off road parking for roughly five cars, although being on a secondary road, the facility will mainly serve local residents who have no need to drive here.

(xi) Kelvedon Hatch – Blackmore Road

6.26 Kelvedon Hatch is a small rural village located within the north of the Borough near Doddinghurst. The extent of the retail offer comprises a small parade of two shops containing an estate agent and a DIY store; a separate Nisa convenience store; and a standalone pub, The Shepherd Inn.

6.27 There is dedicated off street parking facilities for approximately seven vehicles near to the Nisa convenience store, two spaces next to the small parade and many more within The Shepherd Inn car park. In addition, there are no restrictions on roadside parking throughout the centre meaning more cars can stop here in order to use the retail facilities. Although the shop units within the centre are a little dated, the general environment is pleasant with many gardens fronting on to Blackmore Road giving it a rural feel. The pub and the few small shops located here are the focal point of the village and play a vital role in this regard. The centre would appear in good shape with no vacant units and, on the evidence above, Chase and Partners consider it to be both vital and viable.

(xii) Kelvedon Hatch – Kelvedon Common Post Office, Church Road

6.28 Kelvedon Common Post Office is a standalone post office which doubles as a local convenience store offering basic food essentials, alcohol, tobacco, newspapers and magazines. The store is situated adjacent to the A128 (Church Road) which connects Brentwood town centre with Chipping Ongar and the A414. It will serve local residents in the main but benefit from proximity to a main road. The closest alternative post offices which Kelvedon Hatch residents could use are at Stondon Massey and Doddinghurst, both roughly one and a half miles away. As with all local shops in rural villages, Kelvedon Hatch Post Office plays an important for local residents, particularly those with mobility issues who will find it hard to travel around the borough. In this regard the post office clearly plays a vital role as well as being a focal point for the community.

(xiii) Pilgrims Hatch – Danes Way/Hatch Road

6.29 This is a purpose-built shopping parade with residential flats/maisonettes above in the heart of a residential area. The parade consists of five shops including a McColl's convenience store, an osteopath, a masseuse as well as a promotions company which specialises in the sale of branded merchandise. With the exception of the McColl's convenience store, the units contain retailers that might not be expected within a local centre of this nature: these retailers are more than likely attracted to the centre by the relatively low rents found here. Whereas the convenience store will serve the local community in the main, especially as the parade is away from a main road, the other retailers will have much wider catchment areas. It is therefore considered that this parade is providing a vital retail service to both customers and the retailers based here. There are no current vacancies so it would appear to also be in a good state of health.

(xiv) Pilgrims Hatch – No. 2-8 Harewood Road

6.30 A small purpose-built parade, 2-8 Harewood Road comprises three shops: a Cooperative Food store, a Chinese takeaway and a general goods store/charity shop. The parade is set within a residential area some distance from a main road so customers will be predominantly local residents. There is, however, sufficient dedicated off street car parking for up to 12 cars which will aid visitors from further afield. At the time of our visit, the car park was full and the Cooperative Food store was busy – clearly the key driver of visitors. In our opinion this parade appears to be operating successfully.

(xv) Pilgrims Hatch – Ongar Road

6.31 A small local centre formed along Ongar Road (A128) within the north of the town of Brentwood, the centre consists of a parade of three shops: a Threshers off-licence, a restaurant and a physiotherapy clinic. In addition there is a large public house and Pilgrims Hatch Post Office which doubles as a local convenience store. The centre will in the main serve the local community from the surrounding residential area, although will also benefit from visiting customers passing through on Ongar Road. The centre is clearly the focal point for the local community, and would appear to be carrying this function out successfully at present in our opinion.

(xvi) Stondon Massey – Stondon Post Office, Ongar Road

6.32 The Stondon Post Office opens three days each week, Monday, Tuesday and Thursday between the hours of 9am and 1pm. The post office carries out basic postal function and very little else. Regardless of this, the post office carries out an important function for local residents, particularly for those who are less able to travel to Doddinghurst where the nearest alternative is.

(xvii) Warley – The Keys, Eagle Way

6.33 The Keys is a small shopping precinct in Warley, within the Brentwood urban area. The precinct lies opposite the Ford Motor Company office building on Eagle Way which will bring additional expenditure in addition to local residents from the residential area to the west of the centre. There are in total 13 retail units within The Keys precinct. They are occupied by a bathroom showroom, a social enterprise training facility, an off licence, a McColl's convenience store, a beauty salon, a betting office, a hairdressers, plumbing supplies store, a deli/sandwich bar, a dry cleaners, a tanning salon, a takeaway and a children's shoe shop. The mix of retailers is typical of a small local centre of this nature, dominated by services with an above average level of convenience good retailers. All of the units are occupied by independent traders with the exception of the McColl's convenience store unit.

6.34 The Keys benefits from a dedicated off street car park which can hold up to 37 vehicles. This car park is reserved specifically for shoppers and visitors to Keys Hall, a community hall managed by Brentwood Leisure Trust. This parking facility should be more than adequate for the local centre except on occasions when there is an event on at Keys Hall which could result in lack of parking provision.

6.35 Although buildings within The Keys are a little dated and beginning to show signs of wear and tear, the general environment is pleasant with several trees set within formal green space within the centre. Furthermore, the retail area is pedestrianised making for a pleasant shopping experience.

6.36 The Keys is clearly trading successfully at present. There are no vacant units here and it benefits from the close proximity of the large Ford Motor Company office and Keys Hall not to mention the centre providing a focal point for the local community. On the evidence of the above Chase and Partners consider that it is both vital and viable.

(xviii) West Horndon – No. 1-7 Chafford Gardens

6.37 Similar in size and scale to Danes Way/Hatch Road within Pilgrims Hatch, this parade of three shops is also a purpose built retail centre with residential flats/maisonettes above. It is anchored by a McColl's convenience store which also doubles as West Horndon Post Office. The remaining two units are currently occupied by a hair salon and fireplace specialist. This parade benefits from off street car parking to the front of the retail units with capacity for roughly 10 vehicles. At the time of our visit there were seven cars parked here which would indicate that the shops are popular. Although a little dated the parade is set within a pleasant building, is clean and appears to be well maintained. On the evidence of the above, Chase and Partners consider that this parade is well used by the local community and in turn provides a vital local retail facility.

(xix) West Horndon – No. 179-189 Thorndon Avenue

6.38 This is a purpose built retail parade of six shops located within West Horndon with flats/maisonettes above. The majority of the units are currently being occupied as offices meaning a large proportion of the frontage is inactive, although there is also a dry cleaners, a Londis convenience store and a hair/beauty salon. Car parking is located to the front of the parade with sufficient space for roughly 12 vehicles. This is ample parking and it should be considered a strength as it allows customers from outside the village to park and shop within the parade. At the time of our visit the parade was busy with several cars parked here which would indicate that this facility is well used. There is only one vacant unit within this parade and the majority of the units appear to be well used and well maintained. The parade is clearly providing a vital function to both the residents of West Horndon who use it as well as affordable commercial space for the businesses located here; as such we consider it to be both vital and viable.

7. Quantitative Need Assessment

7.1 In accordance with well-established practice and prevailing national advice contained in PPS4 and associated Practice Guidance, Chase & Partners have undertaken a 'goods based' assessment of future floorspace need within Brentwood Borough. Detailed tabulations are set out in **Appendices L** & **M**, the first dealing with convenience goods and the latter dealing with comparison goods. The methodology and its main outputs are summarised below.

7.2 In making an assessment of quantitative need it is important to make a distinction between an assessment of need made for the purposes of informing plan making and an assessment that might be made in support of a planning application. In this case the assessment is made with a view to informing Brentwood Borough Council how much additional floorspace should be planned for as part of the local development plan process. This takes a number of considerations into account including existing provision and competing requirements for land. It is necessarily "broad-brush" and does not take account of the individual circumstances of particular sites or retailers. A particular retailer might, therefore, be able to make a case for further floorspace above that recommended in this report, but it does not follow that this should be planned for in the local development plan, which must balance competing demands for land.

Population & Expenditure Growth Estimates

7.3 Detailed population and expenditure information was obtained from Experian – a copy of population data for each postcode zone is included in **Appendix N** and a copy of expenditure data for the entire study area is included at **Appendix O**.

7.4 The population data used in this report is *Experian Revised 2009-based Population Projections*. The basis for the 2009 projection is the 2001 UK Census, Experian then projected the population totals forward each year up to 2029. In order to be in line with timescale for the Council's emerging local development plan, Chase & Partners then extrapolated these population projections forward an additional two years to 2031. Please see the *Briefing note regarding Experian Revised 2009 Household and Population Estimates and Experian Revised 2009-based Population Projections* attached at **Appendix P** for further information. It should be noted that these projections are purely trend based. They cannot take into account future factors affecting the rate of population growth, e.g. policy considerations, changes in the rate of house building.

7.5 Based on the Experian data, the population of the study area as a whole is expected to increase as follows during the study period:

Table 11: Study Area Population Growth 2010-2032

YEAR	TOTAL	CHANGE	
2010	154,001	-	-
2015	161,201	+7,200	+4.7%
2020	168,923	+7,722	+4.8%
2025	176,383	+7,460	+4.4%
2031	185,248	+8,865	+5.0%

Source: Table 2 and 3 in **Appendix L**

7.6 Bespoke expenditure data was sourced from Experian which reflects the average expenditure patterns of residents and households within the study area, the data is expressed in 2009 prices.

Convenience Goods Expenditure

7.7 Experian expenditure data shows that convenience goods expenditure per annum per capita within the study area during 2009 was £1,917. By projecting growth rates to 2031 Chase & Partners have estimated total available expenditure on convenience goods– see Table 4 in **Appendix L** and Table 12 below.

Table 12: Study Area Total Convenience Expenditure Growth 2010-2031

Year	Total
2010	£296,105,577
2015	£318,717,629
2020	£348,595,442
2025	£380,667,214
2031	£421,879,959

7.8 For the reasons touched upon within **Section 3**, the latest per capita consumer spending growth projections[20] which taking into account the effect of the

20 Experian Retail Planner Briefing Note 8.1 – **Appendix Q**

downturn, indicate that although annual growth in convenience goods expenditure for the short term to 2012 will be weak, the growth rate beyond that to 2027 will be reasonably strong by comparison. Convenience expenditure per capita is anticipated to grow in line with the spending forecasts shown on page 7 (Figure 1) of Experian Retail Planner Briefing Note 8.1 August 2010 as noted in **Appendix Q**. A growth rate of 0.3% has been applied in 2010, 0.0% in 2011, 0.4% in 2012, 0.8% has been used per annum for period between 2013-2017 and 0.9% per annum thereafter up to 2031.

Table 13: Convenience Expenditure Growth 2010-2031

Year	Convenience Expenditure per annum per capita (2004 Prices)
2010	£1,923
2015	£1,977
2020	£2,064
2025	£2,158
2031	£2,277

Source: Table 4 in **Appendix L**

7.9 Tables 2-7 of **Appendix L** set out population and expenditure data for convenience goods in Brentwood and the surrounding study area for 2010, 2015, 2020, 2025 and 2031. The figures are summarised in Table 14 overleaf.

7.10 As shown above, convenience expenditure in the study area is expected to grow by £22.61m in the period 2010 - 2015 and by a further £29.88m in period between 2015 and 2020. Not all of this can be considered 'available' to support new floorspace, indeed it is theoretically available to support both existing and new floorspace throughout the Borough and the surrounding area.

7.11 Combining this expenditure data with intelligence gathered on existing shopping behaviour from the household survey allows us to model existing trading patterns for convenience shopping within the study area and project how this might change in the future.

Table 14: Study Area Convenience Expenditure Growth 2010-2031

Year	Population	Expenditure per capita	Total Convenience Expenditure (£m)	Change (£m)	Change (%)
2010	154,001	£1,923	£296.1	-	-
2015	161,201	£1,977	£318.7	£22.61	7.64%
2020	168,923	£2,064	£348.6	£29.88	9.37%
2025	176,383	£2,158	£380.7	£32.07	9.20%
2031	185,248	£2,277	£421.9	£41.21	10.83%

Source: Tables 2, 4, 5 & 6 in **Appendix L**

7.12 In undertaking this exercise, and in keeping with well-established practice[21] for studies of this nature, we have assumed that main food shopping accounts for 70% of the total convenience goods expenditure available within each of the survey postcode zones. This expenditure has then been apportioned in accordance with the survey results to give turnover estimates for identified stores – see Tables 8a and 8b in **Appendix L**. This exercise is then repeated for top-up shopping expenditure, which we assume will account for 30% of total convenience goods expenditure – see Table 9a and 9b in **Appendix L**. We then combine the main food and top up shopping expenditure totals to give an overall estimate of turnover (for convenience goods only), for all the identified stores within the study area and on its periphery[22] - See Table 10 in **Appendix L**.

7.13 Having estimated total turnovers for individual stores derived from the study area it is then possible to derive a market share currently being achieved by each of the main stores and the town centres within Brentwood as well as other centres' market share from the study area's pool of expenditure (see Table 11 in **Appendix L**).

7.14 Table 11 in **Appendix L** shows that Brentwood town centre retains 28.7% of the total convenience goods expenditure within the study area. Significantly, the town centre retains a large proportion of convenience goods expenditure within

[21] It is commonly assumed in studies of this nature that main food shopping accounts for 70% and top up shopping accounts for 30% of total expenditure per capita. This figure is a best estimate commonly used by retail professionals and considered to be sufficiently accurate for the purposes of this quantitative analysis.

[22] It should be noted that the 'Total' figure in Tables 14 represent only the convenience turnover derived from within the study area. It should not be taken as an estimate of the total convenience turnover of the store as no allowance is made for additional trade that may be derived from areas beyond the study area.

the three postcode zones that surround it, 49.3% within CM13, 70% within CM14 and 60.3% within CM15. Unsurprisingly the Sainsbury's supermarket accounts for the large proportion of the convenience goods expenditure within the centre, over three quarters of the total amount spent within Brentwood.

7.15 Ingatestone and Shenfield conversely account for an extremely small amount of the total convenience goods expenditure within the study area, 2.3% and 3% respectively. It is worth noting that Ingatestone retains a respectable level of expenditure from within postcode CM4 – 30%.

7.16 Overall, Brentwood retains 33.1% of the total convenience goods expenditure from residents within the study area. This modest level of retention is not surprising considering that surrounding the Borough are several competing towns which all contain large "big four" (Tesco, Sainsbury's, ASDA and Morrison's) supermarkets. Furthermore, postcode zone RM3 undoubtedly has a strong influence on these results given that it is the most highly populated postcode zone within the study area with 48,000 residents, over a quarter of the total. Postcode RM3 is situated to the west of Brentwood Borough within the circumference of the M25 which acts as a natural barrier making it difficult for residents to travel east into Brentwood Borough. RM3 clearly has a proportional influence on the results of the household survey which should be taken into consideration. If RM3 was not included within the results, Brentwood would retain a much large proportion of convenience good expenditure.

7.17 This is demonstrated by the fact that the Borough retains 58.1% of the expenditure within CM13, 77.8% within CM14 and 71.3% within CM15; the three postcodes which make up the majority of the local authority area.

7.18 In terms of the surrounding centres, Basildon accounts for 9.5% of total convenience expenditure, Billericay 15.3%, Chelmsford a mere 3% and Romford 27%. Of this 27%, 85% of convenience goods expenditure within Romford comes from residents within postcode zone RM3 which clearly support the assertion of paragraph 7.16 above. Regardless of this, Billericay and Basildon account for a reasonable amount of convenience goods expenditure, the former more than the latter which is unsurprising considering their respective locations in relation to the study area. Chelmsford by comparison accounts for an extremely small amount of total expenditure, even within the nearby postcode zone CM4 it only accounts for 23.6% of expenditure. Brentwood town centre accounts for a similar level of expenditure from the CM4 postcode (circa 20%) which is encouraging for the town.

Future Floorspace Requirements - Convenience Goods

7.19 Table 12 in **Appendix L** shows our forecasts of convenience goods sales floorspace requirements in the study centres over the course of the plan period. These have been calculated by taking the forecast increase in the relevant pools of expenditure (Table 11, **Appendix L**) and assuming that the centres' current market shares will remain constant. This then reveals the expenditure available to support further floorspace in the study centres for each of the five-year periods from 2010 to 2025 as well as the final six-year period to 2031.

7.20 In terms of the additional floorspace this might support, it should be noted that turnover: floorspace ratios for supermarket and superstore retailers vary tremendously - from less than £4000 per sq metre for some independent foodstore operators and local Co-Operative groups to over £13,000 for Tesco, the market leader. Our estimates are based on a 'middle-range' figure of £9,500 per sq metre and are intended as a guideline for the amount of convenience goods provision which should be planned for.

7.21 It should be noted that the floorspace requirements in Table 15 overleaf are a function of Experian figures, population growth and the household survey results. The longer the term utilised for projecting forward growth in expenditure per capita, the greater the potential for one or all of these variables to be inaccurate. As such the longer the term utilised for projecting forward growth in expenditure per capita, the less reliable the conclusions.

7.22 Figures in Table 12 of **Appendix L** show sales (net) floorspace. The table below adjusts these figures to provide gross floorspace requirements, at a ratio of 60:40. This gross figure takes account of the additional floorspace required within shops and supermarkets for servicing and administrative areas, in essence it is the true amount of newly developed floorspace necessary to provide the requisite amount of retail sales floorspace.

Table 15 – Floorspace Requirements - Convenience Goods

Centre	Floorspace Requirement 2010-2015 (sq m)		Floorspace Requirement 2015-2020 (sq m)		Floorspace Requirement 2020-2025 (sq m)		Floorspace Requirement 2025-2031 (sq m)		TOTAL Floorspace Requirement 2010-2031 (sq m)	
	Net	Gross	Net	Gross	Net	Gross	Net	Gross	Net	Gross
Brentwood	683	1,138	903	1,505	969	1,615	1,245	2,075	3,800	6,333
Ingatestone	54	90	71	118	76	127	98	163	299	498
Shenfield	71	118	93	155	100	167	129	215	392	653

Source: Table 12, **Appendix L**

7.23 The results show that the floorspace requirements are modest for Ingatestone and Shenfield over the course of the entire study period. Even in 2031, the capacity of either centre to support even a new medium or small convenience goods supermarket is limited.

7.24 Conversely, the floorspace requirement for Brentwood town centre over the course of the study period is substantial at 3,800 net sq metres to 2031, enough to support a substantial convenience goods supermarket. Floorspace requirements for each time period grow consecutively over the course of the study. There is a net requirement for 683 sq metres between 2010 and 2015, 903 sq metres between 2015 and 2020, 969 sq metres between 2020 and 2025, and 1,245 sq metres between 2025 and 2031. For point of reference it should be noted that a typical convenience goods store within the UK, the kind occupied by a nationwide multiple retailer, would be expected to have a gross floorspace of circa 300-700 sq metre; a small supermarket would be circa 1,000-3,500 sq metres gross floorspace; a medium sized supermarket would be circa 3,500-6,000 sq metres gross floorspace; and a large supermarket would be anything between 8,000-19,000 sq metres.

7.25 It should also be noted that the food store permitted within the William Hunter Way redevelopment will cater for the majority of this floorspace requirement in the short to medium term. Permission has been granted for a gross 40,000 sq ft (3,700 sq m) high quality food store.

Overtrading of Existing Stores within Brentwood

7.26 A quantitative need case for further floorspace can draw on three sources of potential need: growth in expenditure (a function of population growth and increases in per capita expenditure); clawback of expenditure currently leaking out of the study area; and overtrading of existing floorspace.

7.27 Table 13 in **Appendix L** shows our calculations of overtrading of the existing main convenience goods stores within Brentwood town centre. This takes the turnover of individual stores as calculated by the modelled household survey results, and compares them to a notional "benchmark" turnover for each store, based on their company average sales densities. Essentially the benchmark figure represents the store's turnover if it were performing in line with the average for its operator. It should be noted that the M&S store has been excluded from this exercise as the company is a comparison goods retailer in the main, as such it is impossible to calculate the average sales density of the food elements of the business separate from the overall sales density.

7.28 The table shows that Sainsbury's in Brentwood is over performing relative to the benchmark position, it is "overtrading" by some £5.6m.

7.29 With regard to the smaller stores, Iceland is performing reasonably well and is currently estimated to be overtrading by some £0.25m. The Co-op store is estimated to be underperforming their company average quite significantly. However, the performance of smaller stores tends to be underestimated by expenditure modelling exercises. We therefore discount the estimates of turnover for theses stores and focus on the main stores generally.

7.30 Table 16, overleaf, shows the relative performance of each of the three discussed stores. In total, the three stores are estimated to be overtrading by some £4.62m, a reasonable amount.

7.31 If converted into high density convenience goods sales floorspace such as with Sainsbury's, this would equate to the potential for an additional 373 sq m floorspace; if converted to medium density convenience goods sales floorspace such as with Iceland there would be sufficient overtrading to support an additional 537 sq m floorspace; and finally if converted to low density convenience goods sales floorspace such as is the case with Co-op there would be sufficient overtrading to support an additional 806 sq m floorspace. These results would therefore perhaps indicate that there is enough existing residual expenditure within these stores to possibly support a small to medium sized convenience store. However, it should be noted that as above with the floorspace requirement resulting from growth in convenience goods expenditure, the William Hunter Way redevelopment will cater for the majority of this floorspace requirement in the short to medium term.

Table 16: Overtrading of Existing Foodstores in Brentwood

Store	Turnover 2010	Sales Floorspace (sq m)	Company Ave Sales Density (£ per sq m)	Benchmark Turnover	Overtrading
Sainsbury's	£64.35m	4,746	£12,380	£58.76m	£5.60m
Co-op	£3.69m	1,430	£5,730	£4.92m	-£1.22m
Iceland	£3.35m	600	£8,610	£3.10m	£0.25m
Total					**£4.62m**

Source: Mintel Retail Rankings 2010; Table 13, **Appendix L**

Comparison Goods Expenditure

7.32 The same methodology as above has been used to estimate per capita expenditure available on comparison goods. By applying Experian's projected future growth rates in per capita expenditure on comparison goods between 2010-2027 and extrapolating these projected future growth rates between 2028-2031 we are able to estimate total available expenditure for the study period – see Table 16 overleaf. Again, it should be reiterated there are inherent risks in projecting forward growth in per capita expenditure. Whilst one can place reliance on the forecasts in expenditure growth in the short/medium term (i.e. the period 2010 to 2020), estimates beyond this period should be treated with a certain degree of caution and ideally revisited over the next five years as part of any local development plan review.

7.33 The latest data from Experian indicates that growth in comparison goods expenditure is expected to be far more modest[23] in the short to medium term than it has been in the past. Experian forecast that growth in the level of per

[23] Experian Retail Planner Briefing Note 8.1 – **Appendix Q**

capita comparison goods consumer spending will be 0.4% in 2010, 1.2% in 2011, 2.4% in 2012, 2.7% per annum from 2013 to 2017 and 2.9% per annum from 2018 to 2027. By comparison the long term average is 4.7% per annum between 1969 and 2009, this emphasises the relative weakness in expenditure growth predicted in future years. However, it should be recognised that over the 20 year course of the plan period, the growth rates of 2.4%, 2.7% and 2.9% used within this assessment will still give rise to a substantial surplus of comparison goods expenditure and as such, floorspace need. Experian only provide growth rates to 2027 so for the purposes of this study, Chase & Partners have used the 2018-2027 growth rate of 2.9% for the year 2028-2031.

Table 16: Comparison Expenditure Growth 2010-2031

Year	Population	Expenditure per capita (£) (2009 prices)	Total Comparison Expenditure (£m)	Growth (£m)	Growth (%)
2010	154,001	£3,118	£480.2m	-	-
2015	161,201	£3,500	£564.2m	£84.0m	14.89%
2020	168,923	£4,022	£679.4m	£115.2m	16.96%
2025	176,383	£4,641	£818.4m	£139.0m	16.98%
2031	185,248	£5,508	£1,020.4m	£202.0m	19.80%

Table 2, 5 & 6 in **Appendix M**

7.34 As Table 16 above shows, growth in expenditure on comparison goods across the study area in the period between 2010 to 2031 is projected to be reasonably large at some £202m. However, as with convenience goods expenditure, not all of this would be available to support both existing and any proposed new floorspace in the Borough. In order to gain an insight into the level of expenditure growth that would reasonably be available to support existing and future floorspace, we need, in the first instance, to estimate turnover currently being achieved by the centres in Brentwood Borough and assess the market share that each centre currently achieves.

7.35 Chase & Partners have therefore modelled the results of the household survey in order to identify flows of expenditure into the Borough's main centres for nine product categories from each of the study area zones. Details of this exercise are contained in Tables 8-16 in **Appendix M.**

7.36 Table 17 in **Appendix M** aggregates this data to show that, in 2010, of total comparison expenditure available in the study area of £480m, around £88m was retained by centres within the Borough. As such, the 'retention rate' of all comparison goods expenditure by the study centres is relatively low at 18.4%. Of the convenience goods retail expenditure retained by Brentwood Borough, nearly all, 16.3% (£78.4m) is accounted for by Brentwood town centre, 1.2% (£5.5m) by Shenfield town centre and 0.9% (£4.4m) by Ingatestone – see Table 17 & 18 below. Although Warley Hill will retain some comparison goods expenditure as it contains a number of comparison goods retailers, the results of the household survey did not provide any evidence on this so it is impossible to calculate a figure for expenditure within this assessment. The retention rates (%) and total amounts (£m) of expenditure for the main centres within the region are given in Tables 17 and 18 below.

7.37 With regard to nearby centres competing with Brentwood town centre, the results are as follows: Basildon accounts for 11% of total comparison goods expenditure within the study area, Billericay 5%, Chelmsford 8%, Lakeside Shopping Centre 13% and Romford 22%. The large population contained within postcode zone RM3 within the circumference of the M25 close to Romford undoubtedly has a considerable effect on the outcome of the results, inflating the level of comparison good spending that takes place within the town overall. The remainder of Brentwood's comparison goods expenditure is somewhat scattered, Shenfield has a limited impact on the results, as does Ingatestone, see Table 17 and 18 overleaf. Non-shop expenditure, known as Special Forms of Trading (SFT), consisting largely of internet and mail order purchases, accounts for 7-10% of comparison goods expenditure across the entire study area.

7.38 In terms of the flows of comparison good expenditure, Brentwood town centre takes the majority of expenditure for the surrounding three postcode zones; 25.9%, 41.1% and 32.3% from CM13, CM14 and CM15 respectively. It also performs moderately within postcode CM4 taking 11.4% of total comparison expenditure. Ingatestone, takes a reasonable level of expenditure from the surrounding zone, 11.1% from CM4. Elsewhere, Basildon and Billericay unsurprisingly have a strong influence on spending within zones CM11 and CM12; Chelmsford on CM4 and to a lesser extent CM11, CM12 and CM15; and Lakeside on CM12, CM13, CM14 and CM15 – Lakeside Shopping Centre is clearly a popular shopping destination for Borough residents.

Table 17: Expenditure by Goods Category (%)

Centre	Clothing, Footwear & Other Fashion Goods	Furniture, Carpets & Other Floor Coverings	Household Textiles & Soft Furnishings	Domestic Electricals Appliances	AV, Telephone, Photographic & IT Equipment	China, Glass & Utensils	DIY & Gardening Goods and Decorating Supplies	Books, Jewellery, Sporting, Recreational and Luxury Goods	Chemists Goods
Brentwood	13.5%	7.6%	9.4%	12.4%	12.6%	17.9%	11.2%	20.1%	30.5%
Shenfield	0.2%	1.4%	0.2%	0.3%	-	0.5%	1.0%	0.2%	5.3%
Ingatestone	-	0.1%	0.1%	0.2%	-	0.2%	2.7%	0.7%	3.2%
Basildon	11.0%	14.2%	13.3%	16.1%	15.7%	11.6%	20.4%	6.7%	4.1%
Billericay	1.5%	2.5%	1.0%	1.1%	1.0%	2.2%	2.5%	4.3%	18.3%
Chelmsford	13.4%	8.4%	9.9%	6.9%	7.3%	7.4%	6.6%	7.5%	2.1%
Lakeside	22.4%	22.2%	19.5%	10.2%	9.1%	18.4%	1.0%	13.2%	1.0%
Romford inc. Gallows Corner	22.2%	20.7%	25.5%	27.7%	26.5%	23.3%	34.7%	17.4%	15.3%

Source: Tables 8d, 9d, 10d, 11d, 12d, 13d, 14d, 15d & 16d - **Appendix M**

Table 18: Expenditure by Goods Category (£m)

Centre	Clothing, Footwear & Other Fashion Goods	Furniture, Carpets & Other Floor Coverings	Household Textiles & Soft Furnishings	Domestic Electricals Appliances	AV, Telephone, Photographic & IT Equipment	China, Glass & Utensils	DIY & Gardening Goods and Decorating Supplies	Books, Jewellery, Sporting, Recreational and Luxury Goods	Chemists Goods
Brentwood	£15.37	£3.90	£1.57	£1.99	£7.08	£1.97	£5.15	£19.56	£21.78
Shenfield	£0.23	£0.71	£0.04	£0.05	-	£0.05	£0.47	£0.23	£3.75
Ingatestone	-	£0.06	£0.02	£0.03	-	£0.03	£1.24	£0.66	£2.32
Basildon	£12.49	£7.27	£2.22	£2.57	£8.85	£1.28	£9.44	£6.49	£2.89
Billericay	£1.71	£1.28	£0.16	£0.17	£0.56	£0.24	£1.17	£4.15	£13.06
Chelmsford	£15.22	£4.31	£1.66	£1.11	£4.13	£0.82	£3.05	£7.28	£1.47
Lakeside	£25.55	£11.35	£3.27	£1.63	£5.13	£2.03	£0.47	£12.84	£0.72
Romford inc. Gallows Corner	£25.32	£10.58	£4.27	£4.43	£14.88	£2.56	£16.04	£16.99	£10.95

Source: Tables 8d, 9d, 10d, 11d, 12d, 13d, 14d, 15d & 16d - **Appendix M**

7.39 It should be noted that Bluewater has a negligible influence on expenditure on comparison goods within the study area so as such has not been included within the tables above.

7.40 As with the flows of convenience goods expenditure, there is a predictable geographical pattern to the distribution of flows of expenditure within the study area. In general the expenditure tends to flow from each postcode zone to centres located close by, Romford for example accounts for 65% of the expenditure from RM3 and 42% from RM4. Judging by the pattern of expenditure flows, it would appear that the M25 Motorway acts as a barrier or marks the boundary over which very little comparison goods expenditure flows eastward from RM3; as shown by the results in Table 17 in **Appendix M**.

7.41 In terms of individual goods categories expenditure within Brentwood town centre, this underperforms for furniture, carpets and other floor coverings, household textiles and soft furnishings retaining well below average levels of expenditure in comparison to other good categories. Conversely, with regard to chemists' goods, Brentwood performs well above average taking 30.5% (£21.78m) of total expenditure and 49.4%, 82.2%, 62.6% and 50% from zones CM13, CM14, CM15 and RM4 respectively. The town centre also performs well for china, glass and utensils and books, jewellery, sporting, recreational and luxury goods commanding 17.9% (£1.97m) and 20.1% (£19.56m) of total respective expenditure for each category.

7.42 Ingatestone does not retain much expenditure, the centre does, however, command 44.6% of chemists' goods and 22.1% of the DIY and decorating goods expenditure from within CM4. These goods categories are clearly areas of strength for Ingatestone. Likewise, Shenfield accounts for 21% and 10.2% of chemists' goods expenditure from zones CM13 and CM15 respectively. It is fairly typical for small centres such as Ingatestone and Shenfield to retain a reasonable level of chemists' goods expenditure from the surrounding local area as they are often bought in conjunction with convenience goods from supermarkets and convenience stores; furthermore pharmacies are commonly located within such centres.

7.43 There appears to be symmetry to the results for each goods category as demonstrated within Tables 8 to 16 in **Appendix M**. There are generally one or two market leading town centres and the same five or six destinations consistently dominate the spending patterns: Brentwood town centre, Romford town centre, Lakeside Shopping Centre, Chelmsford town centre, Basildon town centre and Gallows Corner Retail Park in Romford.

- Romford town centre and Lakeside shopping centre are strong for clothing, footwear and other fashion goods;
- Lakeside again for furniture carpets and other floor coverings; Romford and Lakeside for household textiles and soft furnishings;
- Gallows Corner Retail park for domestic electrical appliances and AV, telephone, photo and IT equipment, although the internet also accounts for roughly the same level of expenditure in each of these categories;
- Romford town centre, Lakeside and Brentwood town centre for china, glass and utensils;
- Gallows Corner Retail Park for DIY & goods, gardening goods and decorating supplies; and
- Brentwood town centre, Romford town centre and the internet for books, jewellery, sporting, recreational and luxury goods (miscellaneous) – see Tables 17 and 18 above.

7.44 The exception to this rule would be for chemists' goods where Brentwood is far and away the market leader but Billericay also figures highly.

Future Floorspace Requirements - Comparison Goods

7.45 Turning to future floorspace requirements of the study centres, Table 24 of **Appendix M** shows that Brentwood's total town centre turnover (comparison goods) in 2010 is estimated to be £78.4m. This is expected to rise to £93.3m in 2015, £113.3m in 2020, £137.5 in 2025 and £173 in 2031. Applying the 2010 figure to the known quantum of floorspace[24] (Table 23, **Appendix M**) allows us to calculate the town's turnover per square metre ratio (£14,312/sq m – Table 24, **Appendix M**). Assuming an annual increase in floorspace efficiency of 1.5%, in

[24] Goad Centre Reports (Brentwood and Shenfield) and Chase & Partners own floorspace survey

line with the long term average as given by Experian[25], and assuming constant market share, Brentwood will require a further 1,106 sq m of net comparison goods floorspace by 2015 and a further 1,317 sq m in the following five years. Shenfield, turning over only £2,745/sq m, will require 212 sq m to 2015 and a further 250 sq m in the period 2015-20. Ingatestone, turning over £1,399/sq m, is forecast to require 108 sq m in the period to 2015 and a further 134 sq m in the subsequent five years. As Warley Hill is not a comparison goods destination to any notable degree, it has not been possible to estimate the current level of comparison goods expenditure within the centre. We cannot therefore include the centre within this part of the model.

Table 19: Floorspace Requirements 2010-31

Centre	**Floorspace Requirement 2010-2015 (sq m)**		**Floorspace Requirement 2015-2020 (sq m)**		**Floorspace Requirement 2020-2025 (sq m)**		**Floorspace Requirement 2025-2031 (sq m)**		**TOTAL Floorspace Requirement 2010-2031 (sq m)**	
	Net	Gross	Net	Gross	Net	Gross	Net	Gross	Net	Gross
Brentwood	1,106	1,843	1,317	2,195	1,599	2,665	1,941	3,235	5,963	9,938
Ingatestone	212	353	250	417	301	502	363	605	1,127	1,878
Shenfield	108	180	124	207	145	242	172	287	549	915

Source: Table 24 & 25, **Appendix M**

Conclusions

7.46 These results show that in general, Brentwood town centre is an important shopping destination within the sub-regional retail hierarchy for both convenience and comparison good shopping. Moving forward, there is a reasonable requirement for additional convenience and comparison goods floorspace assuming the aim is to maintain the centres' market share (assuming a policy of seeking to increase market share, the floorspace requirement could grow exponentially). The William Hunter Way car park site redevelopment should provide the majority of this forecast requirement.

7.47 In our view, the three centres of Warley Hill, Shenfield and Ingatestone are service and convenience goods-driven. They are not significant comparison goods

[25] See Experian Retail Planner Briefing Note 8.1

destinations and clearly lie in the shadow of Brentwood in this regard, although this does not underestimate their value serving local residents. Our forecasts for future floorspace need should be examined in this context. In this regard, it is important to make the distinction between retail need and retailer demand. The former is a mathematical calculation intended to provide a guideline for how much floorspace the local authority should plan for, assuming that it is that authority's policy to try to maintain market share. The latter is actual demand for space from retailers and it does not automatically follow that the existence of need implies the existence of demand. As is often the case with smaller centres, maintaining and enhancing their vitality and viability is more than a matter of simply providing more floorspace. The quality of existing and required space is of paramount importance as is the degree to which the key attractors support the rest of the town centre. The next section examines these matters in detail and provides recommendations on future policy for the study centres.

Footnote

7.48 Chase & Partners acknowledge that this exercise is not perfect. The goods categories modelled do not include every item for sale in Brentwood Borough, and this leaves a certain amount of expenditure unaccounted for. On the other hand, the household survey assumes that the stores/locations cited by respondents are where they always shop for those goods and, as such it has the potential effect of overestimating the value of some expenditure flows. Nonetheless, the approach is widely-used and is generally seen to provide a reasonably robust basis upon which to model both expenditure flows and derive indicative retail floorspace need figures for planning purposes.

8. Policy Recommendations

8.1 The following sections set out our policy recommendations for Brentwood Borough Council's emerging local development plan. They are presented within the context of:

(i) National and regional planning policy guidance and advice, adopted local planning policy and work already undertaken by the Council in preparing the "Brentwood Local Development Plan" outlined in Section 2. In particular advice given to Local Authorities in PPS4 to plan for growth and to maintain and enhance the vitality and viability of town centres;

(ii) Prevailing consumer retail and leisure trends outlined in Section 3 and the results of the household survey summarised in Section 4;

(iii) Our assessment of the current health and vitality of Brentwood town centre, the other three main centres of Ingatestone, Shenfield and Warley Hill as well as the network of village, local and neighbourhood centres, parades and individual shops contained in Section 5 and Section 6; and

(iv) The quantitative need assessment presented in the preceding section.

The Brentwood Local Development Plan

8.2 At the Policy, Performance & Resources Board on 8 December 2010, Brentwood Borough Council agreed to pursue work on a Core Strategy, Site Specific Allocations and development management policies within a single plan, Brentwood Local Development Plan, rather than prepare separate documents, or DPDs, for each of these. The plan will set out a spatial strategy, general locations for new housing and employment growth, specific site proposals, core policies and development management policies.

8.3 Paragraph 6.5 of the 2009 Core Strategy Issues and Options consultation document sought views on possible strategic objectives. Three are particularly relevant to this study, as follows:

- Provide high quality shopping, leisure, cultural and community facilities;

- Enhance the attraction of Brentwood town centre as the focus for shopping, employment and cultural activities in the Borough; and
- Preserve and enhance the natural and historic environment, biodiversity and visual character of the Borough;

8.4 These objectives are in line with national planning policy advice and in our opinion should be retained within the adopted Brentwood Local Development Plan.

The Need for Further Development in the Borough

8.5 As the analysis contained in Section 7 shows, there is quantitative need for both additional comparison and convenience goods retail floorspace in the short term to 2015, medium term to 2020 and the long term up to 2031 by which time the compounded floorspace requirement is substantial in the case of both goods categories.

8.6 The quantitative need for convenience goods floorspace brought about solely by the projected increase in expenditure means the immediate short term floorspace need up to 2015 is limited. However, when the overtrading of existing stores within the Borough is also considered (as advocated within PPS4 Policy EC1), there is sufficient surplus requirement to support a modestly sized new convenience goods store – circa 1,300 sq m of new medium sales density floorspace (£9,500 per sq m per annum). It should be noted that this need is set to be met by the William Hunter Way (WHW) car park redevelopment. Planning consent for this scheme includes permission for a circa 40,000 sq ft food store. The need for further convenience goods retail floorspace within the Borough, on top of the WHW scheme, will not materialise until towards the end of the study period by which time the quantitative floorspace requirement identified within this study should be treated with caution due to the inherent problems with reliability as previously stated in paragraph 7.21.

8.7 The need for comparison goods floorspace within the Borough is more evident, circa 7,660 sq m of net sales floorspace is required over the plan period to 2031. This can be broken down as the need for an additional 1,426 sq m between 2010-2015, an additional 1,694 sq m between 2015-2020, an additional 2,053 sq m between 2020-2025 and an additional 2,499 sq m between 2025-2031. Again, the WHW scheme will meet this need in the short and medium term.

8.8 In terms of future local planning policy, Chase & Partners would suggest that the Local Planning Authority (LPA) should not necessarily need to search for, or allocate additional land for retailing in the short or medium term unless the William Hunter Way car park development scheme is not forthcoming. This approach is supported within PPS4 Policy EC5.5 where local planning authorities are advised to allocate sufficient sites in development plan documents to meet at least the first five years identified need. As such, additional proposals for new retail floorspace should be dealt with on their individual merits at the time of submission, clearly though major new retail developments should be only permitted within Brentwood town centre. Although not strictly necessary, that is not to say the LPA err away from allocating a new retail or mixed use development site should an appropriate town centre site come forward.

8.9 It should be reiterated at this stage that the figures contained in our quantitative need assessment – both gross and net – represent floorspace guidelines and should not necessarily be seen as ceilings on the amount of floorspace that could be provided. However, given the prevailing economic conditions and current uncertainties about the economy generally it would be appropriate for the Council at this stage to adopt a reasonably cautious approach when forming future planning policy. Regardless, we believe that the floorspace figures contained in Section 7 provide a robust "baseline" assessment of future retail (and related service) floorspace requirements for the purposes of the emerging BLDP.

8.10 The quantitative need exercise undertaken as part of this study has also established a need for additional retail floorspace within Shenfield and Ingatestone over the course of the plan period in order for them to retain the same level of current market share moving forward. However, as previously stated in Section 5 they are not significant comparison goods destinations and are secondary to Brentwood in this regard. Chase & Partners would accept that our forecasts for future floorspace need within the two centres might not necessarily reflect the actual retailer demand for space there, we would therefore advise the LPA to adopt a flexible approach towards planning for additional future retail floorspace. For example, directing all new retail floorspace to Brentwood, foregoing the other main centres but further strengthening Brentwood town centre would not necessarily be a flawed policy objective; particularly given the large number of competing retail centres nearby. However, if there is demand for additional space within these centres, in line with the future floorspace requirement established within the quantitative need assessment, it should clearly be supported.

Brentwood Town Centre

8.11 As our health check of Brentwood shows the town centre is currently successful, vital and viable. It generally provides the majority of the goods and services required by its catchment although residents do tend to look elsewhere for some of the comparison goods categories as well as for many entertainment and leisure facilities. The town scores very well in terms of retention of expenditure on convenience goods shopping though and performs reasonably well in terms of selected comparison goods categories such as chemist's goods and books, jewellery, sporting, recreational and luxury goods. Furthermore, the number of linked trips taking place within the centre is very high, especially from residents within the surrounding postcode zones CM13, CM14 and CM15. One of the main reasons for this is the large Sainsbury's store within the centre. A contributing factor is the parking scheme that Sainsbury's run allowing shoppers to redeem the cost of parking if they spend over £5 within the store. Although Brentwood Borough Council can have no control over this, planning policy should seek to encourage retention of the scheme where possible.

8.12 Sainsbury's therefore is clearly one of the major drivers of footfall within Brentwood town centre at present, the completion of the WHW scheme will be another key driver of footfall and will mean that the focus of the centre may shift north away from the High Street to William Hunter Way. As the emphasis of the retail offer shifts north, it will become increasingly imperative for the centre to be managed in such a way that these main drivers of footfall are properly integrated so that they support the rest of the retail, service and leisure offer on the High Street and elsewhere. We are not convinced that this is being fully achieved at present. For example, links between the High Street and William Hunter Way such as Bank Place and Millennium Walk could be enhanced and better signposted and planning policy should reflect this. Policy should continue to encourage the redevelopment of the units between WHW and the High Street in order to provide dual frontages on to both, thus creating additional thoroughfares between the two and helping to better incorporate the proposed WHW scheme into the town centre. At present Policy TC15 'Shop Fronts facing William Hunter Way' provides for this and it should be continued within future policy documents. This approach is advocated within Policy EC3.1 of PPS4.

8.13 A core theme established within this study has been the competition that Brentwood town centre faces from the numerous alternative shopping destinations in the region. The town centres of Billericay, Basildon, Chelmsford and Romford, out of town retail warehouse parks at Billericay and Romford, as well as the shopping centres Bluewater and Lakeside together with the soon to open Westfield Shopping Centre in Stratford. Such competition means that it is particularly important for Brentwood to distinguish itself from these rival destinations. At present the centre offers one of the more pleasant shopping environments within the region, policy should seek to enhance this by building upon the improvements that have been made to the physical fabric of the centre and the street furniture. Where possible, more should be made of the historic character of the centre including more prominent signage and maps showing the location of prominent features such as the ruins of the chapel on the High Street and Brentwood Cathedral.

8.14 The health check of Brentwood established some distinguishing characteristics in terms of the present retail mix within the town centre such as the cluster of interior design and homewares showrooms at either end of the High Street, the cluster of estate agents and other services on St Thomas Road, not to mention the large group of cafes, restaurants, bar and night clubs within the centre, particularly to the west end of the High Street. PPS4 Policy EC4 advocates the active management of the evening and night-time economy in centres and this is something that Chase & Partners would encourage here. Plans are already underway to enhance this element of Brentwood's town centre offer with a view to working toward obtaining 'Purple Flag Status' in the future. Planning policy should assist in this aim where possible. Overall, policy should seek to support a diverse range of uses within the centre in order to create a strong retail mix. The recent introduction of a market on the widened pavement area at the east end of the High Street is a further enhancement and should be supported by planning policy where possible.

8.15 In terms of other leisure within Brentwood, results of the household survey have established that there is potential for improvement in the number and type of leisure and entertainment facilities within the town centre. Presently many local residents are travelling elsewhere to towns such as Romford or Basildon in order to carry out several leisure activities. Encouragingly the results of the household survey also show that if the present deficiencies are addressed, Brentwood town centre should be able to recoup much of the local leisure and entertainment spend which is being leaked to rival destinations since, in general respondents indicated they prefer to use their closest facility. Future planning policy should continue to encourage new cultural, entertainment and leisure uses into the Borough's four main centres as provided currently by Policy TC18 of the Brentwood Local Plan 2005, with the emphasis of major development being located within Brentwood town centre. In this regard, the cinema within the proposed WHW scheme will be a considerable new entertainment facility within the town centre and go some way towards addressing the shortfall in leisure provision that the household survey results would seem to indicate.

8.16 In accordance with Policy EC3.1 of PPS4 Local Planning Authorities should define the extent of town centres and the primary shopping areas. Reflecting this approach Chase & Partners would advise that the existing Primary Shopping Frontage in Brentwood as found within the Local Plan 2005 should be retained in order to protect the high concentration of multiple national comparison retailers there.

8.17 Planning policy should also seek to protect against subdivision. During the current economic downturn and the long process of recovery which many commentators are predicting, it is important that policy protects any large retail units which might accommodate a major driver of footfall in the future. Otherwise, the subdivision of these large units into smaller units would reduce the town's ability to attract major retailers. Although it could be argued that two or three small trading units would be better for a town's vitality than a large empty one, planning must look to the long term. When the retail market recovers retailers will be looking for available space in town centres, if this space has been subdivided and re-let, it will be difficult for larger retailers to locate there which could increase pressure for out-of-town retail floorspace, which in turn would compete rather than support the town centre. Furthermore, Brentwood would potentially miss the opportunity to attract a major driver of footfall. It would therefore be in the long term interest of Brentwood town centre, and the other main centres, to protect their large retail units from subdivision or change of use, even if this results in short term vacancy. This policy approach is particularly critical within Brentwood town centre where there are currently only a limited number of large retail units, as the assessment of vitality and viability identified. The existing M&S unit is one such example of a unit which should be protected against subdivision. At the time of writing this report M&S were in the process of agreeing terms to move their operation to the WHW scheme so it may soon become vacant.

Shenfield District Centre

8.18 As with Brentwood, the health check of Shenfield district centre established that it is presently both vital and viable although in comparison to Brentwood town centre it is predominantly a service and convenience goods centre. This lack of comparison goods offer is not necessarily harmful for the prospects of Shenfield though. In general the objective of planning policy should be to maintain and enhance the vitality and viability of town centres, not necessarily to provide every kind of shopping in every centre - such an objective would be unrealistic in this instance. For Shenfield and equally, Ingatestone and Warley Hill, it is more realistic to accept their role as providers of convenience goods shopping and services in the main and to seek to derive the maximum benefit from these uses for the rest of the town centre. It is important to recognise that services uses such as coffee shops, cafes and hair salons can be important attractions and it makes little sense protecting the frontages from non-retail uses, as would be the case in larger centres with significant comparison goods offers. Given this, Chase & Partners would not recommend the use of policy to protect the type of retailing within parts of these centres but more to promote active frontages throughout. Offices and residential uses on the ground floor should be discouraged from the town centre altogether as these do not have “active” frontages which encourage shoppers into the centre. This approach is supported by Policy EC4 of PPS4.

8.19 In terms of solely Shenfield, planning policy might also seek to strengthen the concentration of town centre uses around the point of strongest footfall at the eastern end of Hutton Road near to the train station and future Crossrail facility. That said, Chase & Partners would advise that the district centre boundary contained within the Local Plan (2005) should be maintained within the new local development plan. This existing compact centre is operating successfully emphasised by the fact that all of the multiple national retailers found within Shenfield are located there. Although not within our recommended district centre designation, recognition should also be made within policy to the benefit the other retail parades further to the west along Hutton Road (Nos. 40-58 & 66-110) and also on Shenfield Road/Chelmsford Road (Nos. 65-73 & 1-5) make to Shenfield as a whole. The vacancy rates within these three parades are low which indicates that they are trading successfully, are well used by local residents and as such are performing a vital retail function. As such Chase & Partners would again recommend a policy to maintain ground floor units/frontages within "active" uses. However, with regard to these secondary frontages we would also recommend a certain amount of flexibility should this situation change in the future. For example, should a number of units within these parades become vacant for a sustained period of time, a protectionist approach might be counterproductive as it would be harmful to the health of both the parades and the centre. Under such circumstances, it would be beneficial to allow the vacant premises to be turned into alternative commercial uses such as office thus enhancing their vitality. Future policy could be worded in such a way that any possible detrimental effect is mitigated.

8.20 As outlined above, Brentwood town centre has undergone a series of works to improve the physical fabric and street furniture within the centre in recent years. These together with measures to reduce the level of vehicular traffic travelling through the centre such as diversions and traffic calming measure have contributed greatly to the enhancement of the town centre environment making it a pleasant place to shop and spend time. Chase & Partners would advocate a similar approach for Shenfield given that the physical fabric of the town centre is now dated and showing the signs of wear and tear that come with this. As it has worked so well for Brentwood, we would advocate a similar partnership approach so that both The Essex Design Initiative and Essex County Council are again involved in formulating any future proposals for the centre of Shenfield.

Ingatestone Village Centre

8.21 As with Brentwood and Shenfield, Ingatestone village centre is in a good state of health at the present time, and is both vital and viable. There are very few vacancies within the centre which would suggest that demand for space within it is high and the retailers located there are trading well. Although the centre has thin pavements and is dominated by vehicular traffic, the disturbance is minimised by the A12 bypass which together with the period buildings and rural feel of the centre, mean it is a pleasant environment within which to shop, socialise and spend time. As with Shenfield, Ingatestone is predominantly a service and convenience goods centre. However, it is clearly carrying out this function successfully and policy should seek to maintain and enhance this. Chase & Partners would recommend that future planning policy should seek to encourage the "active" use of ground floor units rather than to protect them for purely retail purposes.

8.22 The extent of the Ingatestone village centre shopping area is not identified within the Brentwood Local Plan 2005. Given the linear nature of the centre, a long and thin ribbon along the High Street, Chase & Partners would recommend that future policy identifies the boundary of the village centre in order to direct any possible new development or the intensification of commercial uses within it.

8.23 From our own observations made during the health check of Ingatestone, it was apparent that car parking provision within the village centre is currently at or close to capacity. The Local Planning Authority might seek to address this shortfall.

Warley Hill (Brentwood Station Area)

8.24 As with the other three main centres, Warley Hill was found to be healthy, vital and viable as outlined within Section 5. Low vacancy rates within the centre are indicative of this. It clearly operates predominantly as a service and convenience goods centre and Chase & Partners would recommend that the aim of planning policy here should be to maintain "active" ground floor units and frontages rather than to curtail the use of the units within retail functions. Service and convenience uses such as hair dressers, convenience stores, sandwich shops should be encouraged, particularly as they will serve staff from numerous offices found within and nearby to the centre. When formulating any future planning policy for Warley Hill, it is also important to bear in mind the symbiotic relationship the centre shares with Brentwood Train Station and the aforementioned offices. The numerous commuters that use Brentwood Train

Station, office workers and local Warley Hill residents will all use the centre and policy should reflect this.

8.25 In terms of the Warley Hill centre boundary found within Brentwood Replacement Local Plan 2005, Chase & Partners would recommend that this same boundary is maintained in the local development plan and that as such all future development proposals should be directed within it. Although there are a few commercial retail units to the north of the centre outside of the boundary and also one to south, including these within the extent of the centre would mean including a number of additional residential properties and stretch the centre diluting the concentration of commercial activities. In the case of smaller centres such as Warley Hill it is often more beneficial to consolidate the existing retail and commercial uses rather than expand them.

Other Centres, Parades and Individual Shops

8.26 As outlined within Section 6, all 19 local and village centres, parades and individual shops are providing a vital retail and commercial service within their respective neighbourhoods. The LPA will need to look closely at the specific details of each in order to make the appropriate policy recommendations. As a general rule, Chase & Partners would suggest that some commercial or retail activity is better than none, i.e. vacant units; likewise an “active” commercial or retail frontage is always better than a less active use such as an office; generally retail or service uses tend to serve a greater proportion of local residents. Policy should therefore primarily seek to promote the “active” use of ground floor units and frontages such as retail and services. However, where there are a large proportion of vacant units within a retail parade it would be counterproductive to seek to protect and retain that status quo and in such circumstances policy should allow the diversification of use there for offices and non-residential institutions such as clinics, health centres, crèches, and art galleries.

8.27 Policy EC4.1 of PPS4 provides the basis for this policy approach. It states that LPAs should ‘support shops, services and other important small scale economic uses (including post offices, petrol stations, village halls and public houses) in local centres and villages.’

8.28 With specific regard to the various farm shops within the Borough of Brentwood, Chase & Partners would recommend that future planning policy should in general support this form of farm diversification, as long as the facilities 'are consistent in their scale and environmental impact with their rural location' as outlined in Policy EC6.2 of PPS4.

Overall Assessment

8.29 Overall, our view is that all of the four main study centres are performing well. In retail, however, standing still is akin to decline as other centres will also be seeking to improve their offer, either through further floorspace or through improvements to their environment or functionality. Therefore, Brentwood's main centres must also seek to improve.

8.30 Out of the four main centres within the Borough, only Brentwood is likely to compete with the comparison goods offer available in other nearby centres. We believe the best approach for the town centre is to not only build on existing strengths such as convenience goods retailing, services, evening entertainment such as cafes, bars and restaurants as well as the distinct groups of comparison retailers such as the interior design / homewares specialists, all presented in an easily accessible and pleasant environment. Policy should also seek to expand on the existing comparison retail, entertainment and leisure offer where possible.

9. Conclusions

9.1 The data gathered for this study reveals that each of the four main centres are fulfilling their roles within the retail hierarchy, are in a state of good health and are vital and viable. Local residents look to Ingatestone, Shenfield and Warley Hill to provide convenience goods and services, with a limited comparison goods offer seen as a bonus. Significant comparison goods shopping and leisure activities are only really undertaken within Brentwood town centre and as such, it would be more realistic to plan for growth in these within the centre.

9.2 Our view is that Ingatestone, Shenfield and Warley Hill should look to build on their strengths. Brentwood, however, should seek to not only build on existing strength but also look to expand its retail and commercial leisure offer further. The quantitative need assessment does point to an identified need for additional convenience and comparison floorspace which would support this policy objective. Our recommendations are therefore as follows:

- Protect large vacant retail units from subdivision or change of use, even at the expense of short term vacancy;
- Maintaining the existing centre boundaries within the 2005 Brentwood Replacement Local Plan for Brentwood, Shenfield and Warley Hill and further, draw a centre boundary for Ingatestone in order to encourage future retail and commercial development or the intensification of uses;
- The Council should encourage Sainsbury's in Brentwood to maintain the existing car parking regime to allow shoppers time to access the town centre as well as the foodstore;
- Environmental and access improvements should be undertaken by the Council, or required of developers, to links between the High Street and William Hunter Way in order to improve permeability of the centre. This will be of particular importance once the WHW development is completed;
- In the same way that Brentwood town centre has undergone public realm improvements in recent years, improvements should also be made to Shenfield district centre. In particular to the urban fabric of Hutton Road and

associated street furniture in order to make the centre a more inviting place to shop and spend time;

- The centres of Ingatestone, Shenfield and Warley Hill should be managed in such a way so as to increase the level of 'active' frontages;
- The other local and village centres, parades and individual shops throughout the Borough should be managed in the same fashion, so long as the effect would not be to curtail other commercial or active uses of what would be otherwise vacant premises; and
- This study should ideally be reviewed after an appropriate timeframe in order to test the effectiveness of planning policy in maintaining and enhancing the existing vitality and viability of the Borough's centres.