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Brentwood Retail and Commercial Leisure Study

BRENTWOOD BOROUGH COUNCIL

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Final Report

December 2014

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Brentwood Borough Council

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Executive Summary

This Retail and Commercial Leisure Study has been prepared by Nathaniel Lichfield & Partners (NLP) on behalf of Brentwood Borough Council. It is intended to form part of the evidence base for the emerging Local Plan which will cover the period to 2030.

The study provides a qualitative analysis of the existing retail and leisure facilities within the Borough, and a quantitative and qualitative assessment of the need for new retail, leisure and other main town centre uses. The key findings of the study are set out below.

Overview of the Shopping Hierarchy

Brentwood town centre is the main shopping centre in the Borough. Centres at Shenfield, Ingatestone and Warley Hill effectively function as district centres, and the Borough also contains a number of smaller villages/local shopping parades.

Brentwood town centre is categorised as a sub-regional centre (Venuescore), and it falls within the catchment areas of much larger competing centres e.g. Chelmsford, Basildon and Romford. In addition, intu Lakeside, Bluewater, Westfield Stratford and Central London are all easily accessible to residents in Brentwood Borough. The strength of this competition restricts the Borough's market share of expenditure, particularly for comparison goods.

Brentwood town centre has a reasonable number of convenience and comparison retail units and a mix of both multiple and independent traders. The proportion of comparison goods operators is above the national average, and the centre has a good provision and range of comparison categories. The main convenience offer of the centre is the large Sainsbury's supermarket, which suffers from congestion at busy periods. Shopping facilities are supported by a variety of non-retail services, community and leisure facilities. The centre has a good provision of banks, hairdressers, estate agents, cafés, restaurants and takeaways.

Shenfield and Warley Hill are located within the Brentwood urban area and provide a more local service to residents. Ingatestone is a more traditional village centre and serves its settlement and the rural catchment area, providing a range of shops and non-retail services. The comparison shopping offer of these centres is focused on lower order day to day products. Food and grocery shopping is a key element of these centre's overall attraction.

Future Requirements

The retail needs assessment identified floorspace requirements for the Borough over the Plan period to 2030.

The short to medium term capacity figures up to 2020 suggest surplus of available convenience goods expenditure could support an additional 2,151 sq.m net (3,074 sq.m gross), primarily concentrated in Brentwood town centre.

In the long term, surplus expenditure at 2030 could support 3,833 sq.m net of sales floorspace (5,475 sq.m gross) in the Borough as a whole.

For comparison goods, for the Borough as a whole, the surplus expenditure could support an additional 1,193 sq.m net (1,591 sq.m gross) by 2020. The surplus expenditure at 2030 could support 4,844 sq.m net (6,458 sq.m gross). The vast majority of this surplus is for Brentwood town centre, with only a very limited amount identified for the rest of the Borough.

The assessment also identifies a requirement for 2,954 sq.m gross of food and drink (A3-A5) floorspace and 1,654 sq.m gross of other class A1 service uses up to 2030.

The proposed redevelopment of the William Hunter Way site is likely to provide up to 8,000 sq.m of Class A1-A5 floorspace, plus a new cinema. This would absorb a significant proportion of the retail floorspace requirements for Brentwood town centre. The Baytree Centre also provides a further development opportunity within the town centre.

There is a limited requirement for further floorspace within Shenfield, Ingatestone and Warley Hill over the Plan period.

The commercial leisure assessment concludes that a cinema would be desirable to meet the needs of local residents. There is limited potential for other large scale commercial leisure facilities over the Plan period.

Recommendations

The principles of the NPPF indicate that the Council's policy approach should aim to at least fully meet needs, so that the local economy is not constrained and potential investment is not diverted elsewhere or lost. The sequential approach suggests that designated town centres should be the first choice for retail, leisure and main town centre uses. All development should be appropriate in terms of scale and nature to the centre in which it is located.

Given the existing low levels of vacant floorspace within the centres, it is unrealistic to plan to achieve a reduction in vacancy rates, and the reoccupation of vacant premises is unlikely to help accommodate growth.

Within Brentwood town centre, the William Hunter Way site remains the key opportunity for accommodating growth. Aspirations to improve the area around the Baytree Centre could incorporate restaurant/café uses to create more of a destination shopping experience. Diversification of the High Street offer is critical for ensuring that the centre remains an attractive destination, and the eastern end of the High Street in particular could become more of a non-retail quarter, building on existing leisure uses in this part of the town centre.

If Brentwood cannot accommodate the floorspace projection within the town centre, it may be appropriate to allocate sites elsewhere within the Borough, potentially within the smaller centres or to the strategic residential allocations.

Within Shenfield, Ingatestone and Warley Hill, development options for additional retail floorspace are limited. The future strategy for these centres should focus on the reoccupation of vacant units and small scale intensification and extensions.

The increased number of passengers travelling through and using the Crossrail station at Shenfield and Warley Hill (Brentwood Station) could lead to a demand for additional or improved retail and service facilities over and above the identified floorspace requirements. There are limited short term opportunities for additional development in the vicinity of these stations, but in the longer term, sites could become available to meet anticipated future needs.

Other local centres in the Borough should continue to play their important role in providing day to day shops and services that are accessible to residents in villages and rural parts of the Borough.

If the potential strategic residential development at West Horndon is delivered then a new local centre of around 2,000 sq.m gross would be appropriate to support the new residents. This would need to ensure that it would complement rather than compete directly with the existing local centre.

The study provides a broad overview of the potential need for further retail and commercial development in the short – medium term up to 2020, with longer term forecast up to 2025 and 2030. Projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available, in particular longer-term projections up to 2030 should be treated with caution.

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1.0 Introduction

1.1 Nathaniel Lichfield & Partners (NLP) has been commissioned by Brentwood Borough Council to prepare a Retail and Commercial Leisure Study Review, and provide an assessment of the key changes since the 2011 Retail and Commercial Leisure Study, such as the National Planning Policy Framework (NPPF, 2012) and the implications of meeting objectively assessed needs.

Study Objectives

1.2 The key objective of the Study is to provide a robust and credible evidence base to inform the Council's development plan, taking into account changes since the previous study. The study provides:

- a qualitative analysis of the existing retail and leisure facilities within Brentwood Borough, identification of the role of each centre, catchment areas and the relationship between the centres;
- a quantitative and qualitative assessment of the need for new retail facilities within Brentwood Borough, and the need for leisure and other main town centre uses. This assessment will examine the need for both food and non-food retailing including a qualitative analysis for different forms of facilities such as retail warehousing, local shops, large food stores and traditional high street comparison shopping; and
- recommendations for future retail and commercial leisure provision.

1.3 In addition, the study addresses the implications of revised housing number requirements for the Borough over the Plan period to 2030. The study provides a sensitivity analysis, looking at different forecast population growth scenarios, and the impact of the different forecasts on the need for retail and leisure floorspace.

Report Structure

1.4 Section 2 of this report describes the shopping hierarchy. Section 3 outlines retail trends and provides the updated retail capacity and need assessment, and Section 4 assesses the scope for commercial leisure uses and other town centre uses. Section 5 explores opportunities for accommodating growth. Section 6 provides the recommendations and conclusions.

2.0 The Shopping Hierarchy

Introduction

2.1 The National Planning Policy Framework (NPPF) indicates (paragraph 23) that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Local Plans are expected to define a network and hierarchy of centres that is resilient to anticipated future economic changes.

2.2 The recently published Planning Practice Guidance (PPG) places emphasis on developing strategies for town centres that are appropriate and realistic to the role of centres in the hierarchy. Town centre strategies should be based on the current state of a centre and opportunities to meet development needs (in full). These town centre strategies should seek to support the town centre vitality and viability, and should assess if changes to the role and hierarchy of centres are appropriate.

2.3 This section provides an overview of the shopping hierarchy in Brentwood Borough and the surrounding sub-region.

Centres in Brentwood and the Surrounding Area

2.4 Brentwood Borough is bounded by Basildon, Chelmsford, Thurrock, Havering and Epping Forest. The Borough contains Brentwood town centre, and centres at Shenfield, Ingatestone and Warley Hill which effectively function as district centres, plus a number of smaller villages/local shopping parades.

2.5 The Brentwood Replacement Local Plan (adopted 2005) defines prime shopping frontages within Brentwood Town Centre (policy TC7) and parades/blocks within Shenfield, Ingatestone and Warley Hill (policy S4).

2.6 Policy CP12 of the Brentwood Local Plan Preferred Options for Consultation (July 2013) identifies the Borough's Primary Shopping Areas as:

Town Centres:	Brentwood Town Centre
	Shenfield, Hutton Road
Village Centre:	Ingatestone High Street

2.7 In terms of the retail hierarchy in the Borough, the supporting text to this draft policy notes that the Borough has two main centres: Brentwood and Shenfield, both within the wider Brentwood urban area and a number of smaller village centres and shopping parades. The Council's Preferred Option is to include Warley Hill (area around Brentwood Station) within the Brentwood Town Centre boundary.

2.8 The Preferred Options document notes that the most should be made of the opportunity to invest in improving Shenfield's retail offer as it will be a terminus for Crossrail. The document also notes that Ingatestone has the largest village centre in the Borough, providing an attractive local service and convenience centre. The document identifies that there is potential for West Horndon to be a similar order centre in future if the Preferred Option of housing development in West Horndon provides sufficient investment in community, service and retail facilities.

2.9 Chelmsford, Southend and Basildon town centres are at the top of the shopping hierarchy in south east Essex, competing with other large regional/ sub-regional centres, i.e. Romford, intu Lakeside Shopping Centre, Bluewater, Westfield Stratford City and Colchester.

2.10 Venuescore ranks the UK's top 2,500 plus retail destinations including town centres, malls, retail warehouse parks and factory outlet centres. Each destination is given a weighted score for the number of multiple retailers present, and the score attached to each retailer is weighted depending on their overall impact on shopping patterns.

2.11 Venuescore's score does not necessarily reflect the overall size of the centre or the number of shops, but the presence of national multiples and the relative draw and importance that stores have. Each centre is given a weighted score which takes account of its provision of multiple retailers and anchor store strengths. For example, anchor department stores such as John Lewis or Debenhams receive a higher score than other multiple operators, in order to reflect their major influence on non-food shopping patterns. A location which has stronger retailers which attract more visitors to the centre and have a greater influence on shopping patterns will receive a higher score than those that do not.

2.12 Only Brentwood and Shenfield within the Borough are listed within Venuescore's data. The results for these two destinations and other relevant centres are shown in Table 2.1.

Table 2.1 Venuescore UK Shopping Index 2013

Centre	UK Rank	Venuescore
London - West End	1	1,398
Westfield Stratford City	30	288
Romford	45	243
intu Lakeside Shopping Centre	49	237
Chelmsford	72	199
Southend On Sea	81	186
Basildon	87	182
Ilford	90	181
Harlow	168	133
Brentwood	**209**	**110**
Grays	481	54
Lakeside Retail Park	510	52
Loughton	522	51
Upminster	573	47
Billericay	612	44

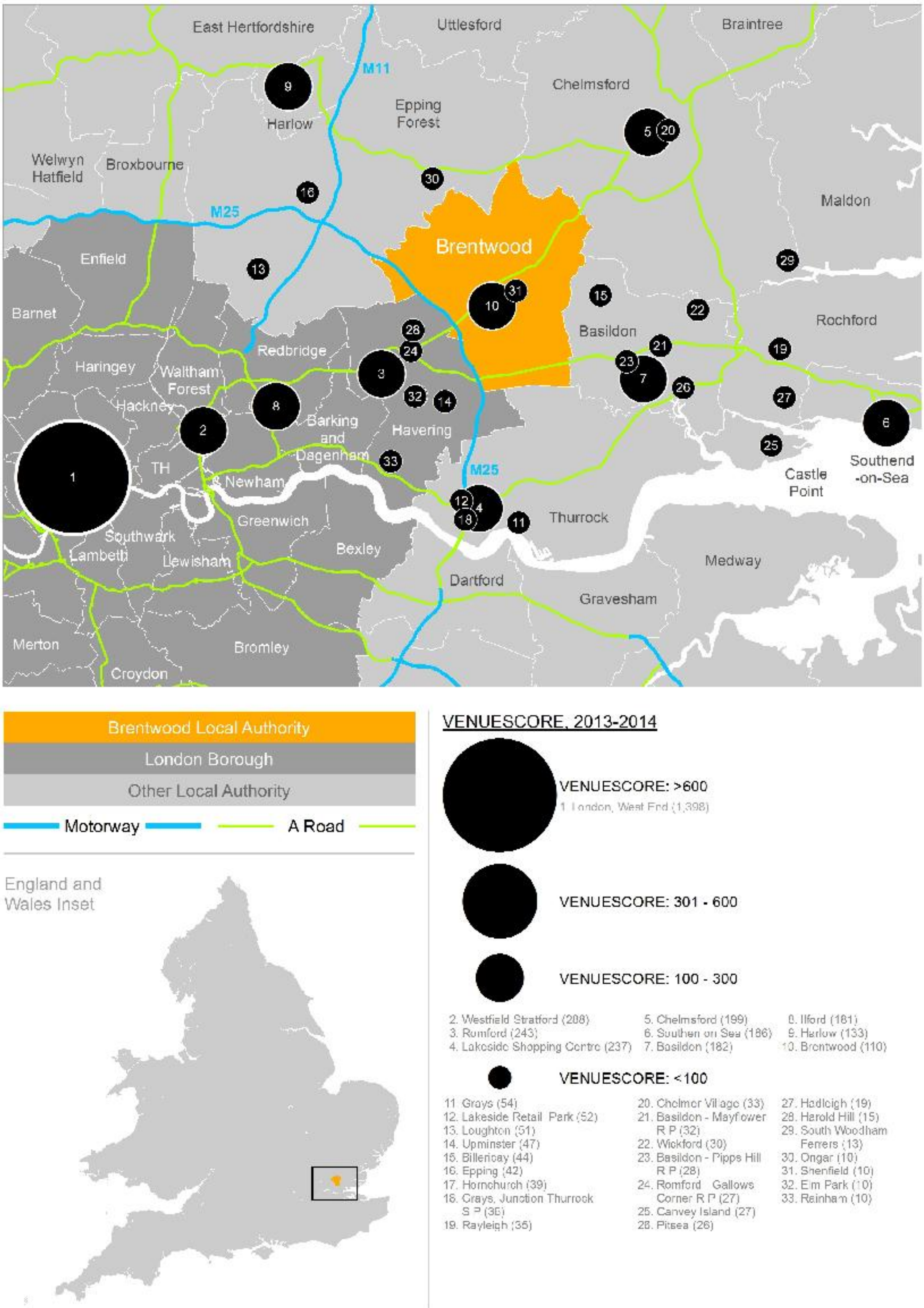
Centre	UK Rank	Venuescore
Epping	636	42
Hornchurch	681	39
Grays, Junction Thurrock Shopping Park	735	36
Rayleigh	752	35
Chelmer Village	805	33
Basildon - Mayflower Retail Park	833	32
Wickford	901	30
Basildon - Pipps Hill Retail Park	962	28
Canvey Island	1,001	27
Romford - Gallows Corner Retail Park	1,001	27
Pitsea	1,024	26
Hadleigh	1,383	19
Harold Hill	1,684	15
South Woodham Ferrers	1,907	13
Shenfield	**2,428**	**10**
Ongar	2,428	10
Elm Park	2,428	10
Rainham	2,428	10

Source: Venuescore, Javelin Group 2013

2.13 Brentwood is categorised by Venuescore as a sub-regional centre, and falls within the catchment areas of the regional centres of Chelmsford and Basildon and the major regional centre of Romford. The location of these Venuescore centres is shown in Figure 2.1 overleaf.

2.14 Figure 2.1 indicates that residents in Brentwood Borough have good access to surrounding regional and major regional centres, as well as having a choice of smaller centres for day to day shopping needs. In addition, intu Lakeside, Bluewater, Westfield Stratford and Central London are all easily accessible to residents in Brentwood Borough. The outflow of retail expenditure from the Borough, particularly comparison goods, is significant and this is likely to remain high in the future.

Figure 2.1 Venuescore Shopping Hierarchy



Existing Retail Provision in Brentwood

2.15 An assessment of the existing retail and service provision in the main centres is provided in the centre audits included at Appendix 5. A summary of existing retail provision in provided in Table 2.2 below.

Table 2.2 Existing Retail Shop Provision

Centre	Class A1 Shop Units	Convenience Goods Floorspace (sq.m net)	Comparison Goods Floorspace (sq.m net)
Brentwood Town Centre	123	6,645	16,245
Shenfield	21	760	735
Ingatestone	33	865	1,299
Warley Hill	23	568	714
Total	**200**	**8,358**	**18,993**

Source: Goad, VOA and NLP site surveys 2014

2.16 The audit of centres in Appendix 5 confirms that Brentwood is the main shopping destination within the Borough followed by Shenfield, Ingatestone and Warley Hill. There is only limited retail provision in the other villages within the Borough. The Borough falls within the sub-regional catchment area of Basildon, Chelmsford, Romford, intu Lakeside and Bluewater, and as a result the leakage of expenditure from the Borough is significant.

2.17 Brentwood town centre provides a reasonable range of shops and facilities that serve the settlement and surrounding area. Shenfield and Warley Hill are located within the Brentwood urban area and provide a more local service to residents. Ingatestone is a more traditional village centre and serves its settlement and the rural catchment area, providing a range of shops and non-retail services.

2.18 Local centres generally include small shops of a local nature, serving a small catchment. They can include a small supermarket, newsagent, post office, takeaways and pharmacy. Facilities at Hutton, Kelvedon Hatch, Mountnessing, West Horndon and other villages are more limited and serve local catchment areas.

2.19 Based on the number, scale and type of shops and services available in Shenfield, Warley Hill and Ingatestone, these three centres should continue to be designated as district centres.

2.20 National and local policy indicates that it is important for the Borough's centres to maintain and strengthen their role in the retail hierarchy. The smaller centres should continue to perform a more local function meeting day to day shopping and service needs.

3.0 Assessment of Retail Need

Introduction

3.1 The National Planning Policy Framework (NPPF) indicates (paragraph 14) that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs.

3.2 The Planning Policy Guidance (PPG) indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses.

3.3 The PPG also introduces the requirement to consider a range of plausible scenarios, including a 'no development' scenario, which should not assume that all centres are likely to benefit from expenditure growth.

3.4 This section objectively assesses the quantitative and qualitative scope for new retail floorspace in Brentwood Borough in the period from 2015 to 2030. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken as part of the town centre audits in Appendix 5.

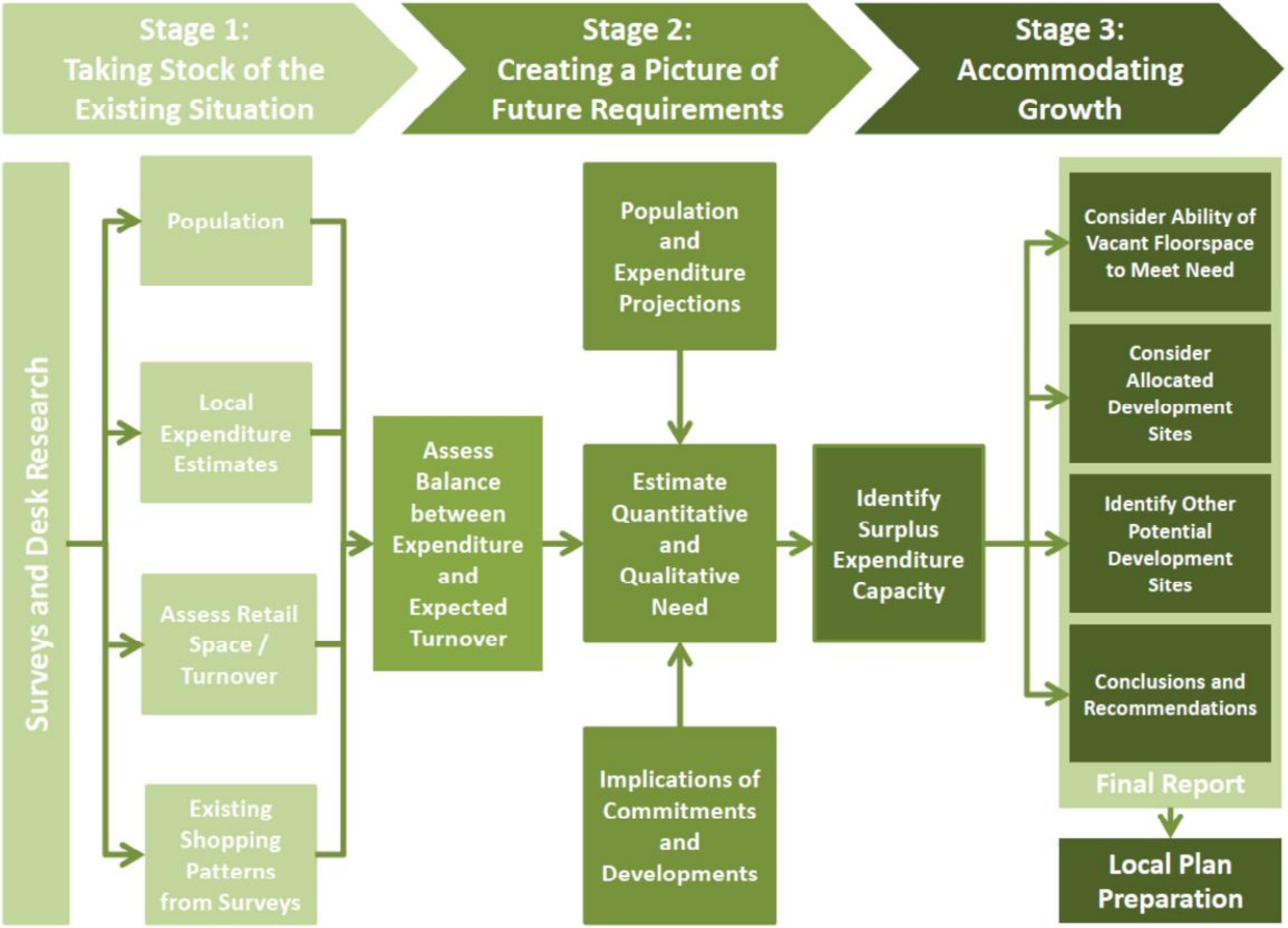
Study Area

3.5 The quantitative analysis is based on a defined study area that covers the catchment areas of the main shopping destinations in the Borough. The study area is sub-divided into five zones as shown in Appendix 1. The survey zones are based on ward boundaries and take into consideration the extent of the primary catchment areas of Brentwood, Shenfield and Ingatestone.

3.6 The primary catchment areas are the area where each centre will attract the vast majority of its retail trade. There will be retail expenditure leakage from the study area to centres outside, but conversely expenditure inflow from surrounding areas.

3.7 The methodology is summarised in Figure 3.1 overleaf and set out in more detail in Appendix 1.

Figure 3.1 Methodology for Estimating Future Requirements for Retail Floorspace



Retail Trends

3.8 This section considers the changes in the retail sector nationally and the implications for Brentwood Borough.

3.9 The economic downturn had a significant impact on the retail sector. A number of national operators have failed (e.g. Blockbuster, Comet, HMV, JJB Sports, Jessops, Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, Peacocks, La Senza, Past Times, Barratts and Habitat), leaving major voids within town centres and on retail parks.

3.10 This trend has not had a significant impact on Brentwood, because most of the affected businesses did not have stores within the town centre. A comparison between data available for Brentwood from the 2011 Retail and Commercial Leisure Study identifies that only four of the operators listed above were present in the town centre in 2011 – Blockbuster, Peacocks, Clinton Cards and Game. Clinton Cards and Game remain in the centre, while the other two stores have now closed. However when comparing the number of vacant units in 2011 (19) and 2014 (16), it is evident that these vacated units have generally been reoccupied, and the failure of these retailers has not had an adverse impact on Brentwood town centre.

3.11 Many town centre development schemes have been delayed and the demand for traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth.

3.12 Assessing future expenditure levels needs to take into account the economic downturn and the likely pace of recovery. As set out in the previous section, the retail study update established the appropriate level of expenditure growth to be adopted over the study period, taking a long term view and recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered and a balanced approach taken.

3.13 An overview of national trends within the retail sector is set out below.

Expenditure Growth

3.14 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However the recovery from the economic downturn is expected to result in slower growth in the short term.

3.15 In the past, expenditure growth has fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The speed of recovery from the economic downturn suggests that high past rates of growth are unlikely to be achieved in the short term, but the underlying trend over the medium and long terms is expected to lead to a need for further modern retail floorspace, even allowing for continued growth in home shopping. These national trends are anticipated to be mirrored in Brentwood Borough.

3.16 For convenience goods, Experian anticipates limited growth up to 2015, but stronger growth thereafter (0.8% per annum). For comparison goods, higher levels of growth are expected in the future (2.9% per annum after 2015), still at a lower rate than previous pre-recession trends.

3.17 Low expenditure growth and deflationary pressures in the non-food sector have had an impact on the high street in the last few years. As a result of these trends, the national shop vacancy rate (based on Goad Plan data) has increased from around 10% in 2005 to over 12% in 2014. The vacancy rate in Brentwood town centre is around half the national average at 6.2%. These figures suggest that during and since the recession Brentwood has performed better in terms of shop vacancies than other centres across the country.

New Forms of Retailing

3.18 New forms of retailing (multi-channel shopping) have continued to grow, as an alternative to more traditional shopping. Home/electronic shopping has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect shopping has become more popular. The future growth of multi-channel retailing including home computing, internet connections and interactive TV will continue to have an effect on retailing in the high street and from traditional stores. Trends within this sector may well have implications for retailing within Brentwood Borough.

3.19 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure. The household survey results suggest 7.6% of households in Brentwood Borough did their last main food and grocery shopping via the internet/ delivery, and 6.4% of households do most of their non-food shopping at home via the internet, TV or catalogue. These figures represent a lower proportion than the internet's national share of retail expenditure (about 11.5% in 2012 – Experian, October 2013).

3.20 More details on internet shopping habits in the Borough are set out in the results of the household survey, summarised in Appendix 6. The internet shopping figures for Brentwood do not indicate higher levels of home shopping than the national average, however internet sales in Brentwood should increase in the future and this assumption is reflected in the allowance made for a growth in the proportion of non-store spending, as set out in the retail capacity methodology in Appendix 1.

3.21 Recent trends suggest continued strong growth in this sector. Experian's Retail Planning Note 11 (October 2013) states:

"The strong increase in online shopping in the past decade has lifted the share of special forms of trading (SFT) to a level where it now accounts for around a tenth of total retail sales...

The rising share of internet sales in total retail transactions dominates the picture of SFT. Internet sales' share of total retail sales stood at near 10% in mid-2013 against 4.7% in June 2008 and just 2.9% as recently as March 2007…

Non-store retailing continues to grow rapidly, outpacing traditional forms of spending. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the long term. There were 52.7 million internet users in the UK (representing 84.1% of the population) in mid-year 2012 according to Internet World Stats. So growth of the internet user base will be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2020. Our forecast has the SFT share of total retail sales reaching 17.4% by 2020 (15.4% in Retail Planner Briefing Note 9 of September 2011), rising to 20% by the end of the 2020s (15.5% previously)."

3.22 This Study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

3.23 The implications on the demand for retail space need to be carefully considered. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators and click and collect operations, therefore growth in on-line sales may not always mean there is a reduction in the need for retail floorspace.

3.24 Given the likelihood that multi-channel shopping is likely to grow at a faster pace than total retail expenditure, the retail study assessment has adopted relatively cautious growth projections for retail expenditure (as set out in the retail capacity methodology, Appendix 1), and allowance has been made for retailers to increase their turnover density, due to growth in home shopping and click and collect.

3.25 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town centres (such as the Tesco Express/Metro, Sainsbury's Central/ Local store and Marks and Spencer's Simply Foods formats). The number of Tesco Express and Sainsbury's Local stores has increased significantly during the last decade, due to the operator's national expansion in this sector, and perhaps also due to the absence of available sites for larger food stores. This trend is evident in Brentwood Borough, eg. Tesco Express stores in Shenfield, Warley Hill and Hutton. The main food store operators have also increasingly sought representation in small towns in predominantly rural areas.

3.26 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. There are currently no discount food operators located within Brentwood Borough, although we understand that Lidl has purchased a site at Wates Way, Ongar Road, Brentwood with the intention of developing a store.

3.27 Food store operators have also implemented a programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have often increased the sale of non-food products within their food stores, including clothing and electrical goods. The recent recession halted this trend for extensions nationally.

3.28 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including a number of mergers and failures, and scaled down store sizes. Other traditional high street retailers often seek large out-of-centre stores, for example Boots, Next, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon have also expanded out-of-centre.

3.29 The charity shop sector has grown steadily over the past 20 years and there is no sign this trend will halt. In many centres, charity shops have occupied vacated shop premises during the recession. In many cases charity shops can afford higher rents than small independent occupiers because of business rate discounts, therefore it does not follow that these charity shops will be replaced by traditional shops when the market recovers, particularly in secondary frontages.

3.30 The discount comparison sector has also grown significantly in recent years e.g. pound shops. Based on our experience, this trend is not particularly evident in Brentwood. There are a number of charity shops (6.4% of comparison units) but not a particularly high proportion, and below the national average of 8.4%.

3.31 Within town centres, many high street multiple comparison retailers have changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation of activity into the larger regional and sub-regional centres, e.g. Chelmsford and intu Lakeside. Operator demand for space has decreased during the recession and, of those national multiples looking for space many prefer to locate in larger centres.

3.32 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, was particularly weak during the recession. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods.

3.33 The economic downturn had a significant impact on the retail sector. A key effect the economic downturn has had on high streets is the increase in vacant shop units. The average unit vacancy rate increased from below 9% before the recession began in 2008 to the current figure of around 12% (source: Experian Goad Plans).

3.34 Brentwood Borough appears to have withstood the effects of the recession reasonably well in terms of shop vacancies. The current vacancy rate is significantly below the national average in Brentwood, Shenfield, Ingatestone and Warley Hill and the number of vacant shop units in these centres fell between 2011 and 2014.

3.35 The continuation of these trends will influence future operator requirements in Brentwood town centre with smaller vacant units becoming less attractive for new multiple occupiers, and retailers increasingly looking to relocate into larger units in higher order centres. However smaller vacant units could still be attractive to independent traders and non-retail services.

3.36 Operator demand for space has decreased during the recession, and of those retailers looking for space, many are likely to prefer to locate in larger centres, particularly multiple retailers. Demand from multiple retailers within Brentwood Borough is likely to be weaker particularly in the smaller, district centres, which will affect the appropriate strategies for these centres.

High Street Retail Trends

3.37 The number of shop units within town centres has declined consistently since the early 1970s. The Centre for Retail Research's "Retail In 2018" (CRR) figures show a decline from over 300,000 units in 2001 to 282,000 in 2012. The CRR "Retail In 2018" report predicts nearly 62,000 high street stores across Great Britain (22% in total) will close between 2012 and 2018.

3.38 Online/multi-channel shopping and increasing retail operating costs are cited as the main culprits. Similar predictions of the High Street's decline were made during previous recessions in the early 1980s and 1990s, which subsequently proved to be exaggerated. On this basis, it is important to examine these predictions within the context of longer terms structural trends.

3.39 These trends hide underlying structural changes in the retail sector. These changes are not new and have been affecting the High Street for many years. In response to these trends, town centres have changed and diversified. The food and drink, leisure and non-retail service sectors have been successful in occupying space no longer suitable for shopping. There have been cyclical trends in vacancy rates reflecting the macro economic trends, but in most cases town centres recovered during periods of stronger growth. The High Street is more resilient than many commentators give it credit.

3.40 There is an underlying trend towards fewer but larger retail stores. Valuation Office data indicates the amount of retail floorspace in England and Wales has grown by over 3% during the economic downturn (2008 to 2012), despite a period of poor expenditure growth and an increase in on-line shopping.

3.41 Shopping behaviour will continue to change and the High Street will need to continue to respond. All town centres will need to focus on the advantages they have over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience. There will always be demand for a day out and customers cannot eat or drink on-line.

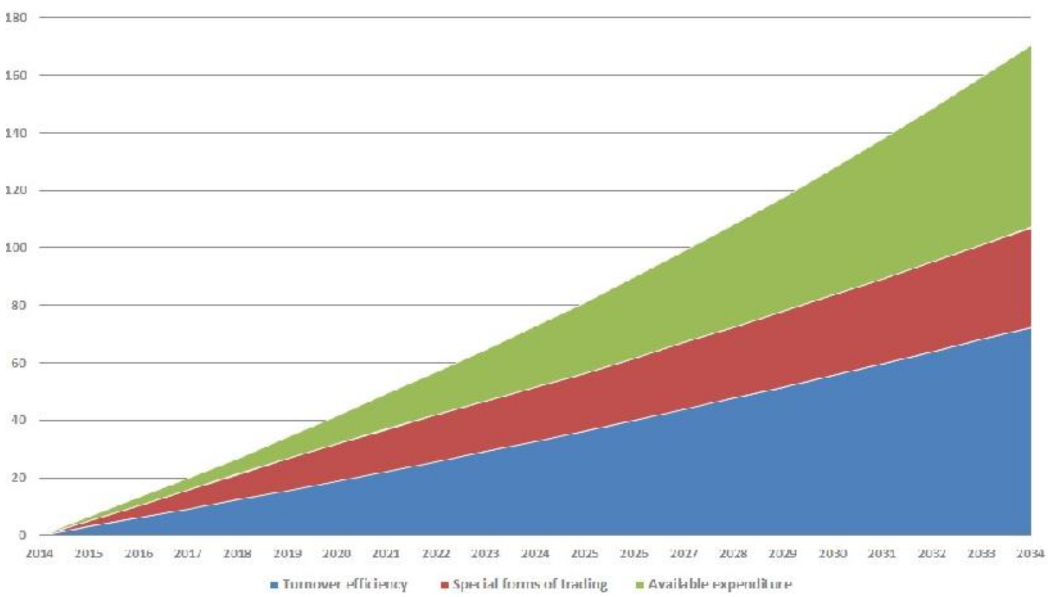
3.42 Experian data indicates that retail expenditure reduced by 1.3% during 2009 to 2012, with the food/grocery and bulky comparison goods sectors hardest hit. These expenditure trends explain why the High Street has performed better than out-of-centre retail parks. During this period the proportion of expenditure attributed to non-store trading (including home shopping) increased from 7.1%

to 11.5%. These figure help to explain why High Streets and retail parks have struggled.

3.43 Experian's most recent forecasts suggest comparison goods expenditure per person will increase on average by 2.9% per annum, in real terms over and above inflation. If this forecast growth rate is achieved then comparison goods expenditure per person will increase by a third over the next 10 years and by 77% over 20 years. Taking into account ONS population projections, comparison goods expenditure in England will double over the next 20 years.

3.44 Not all projected expenditure growth will be available to support new retail floorspace. Non-store expenditure (special forms of trading) is expected to grow at a faster rate than expenditure and in proportional terms will absorb more growth. Continuing trends towards more modern and higher density stores, and the replacement of inefficient space will result in growth in turnover efficiency – Experian suggests a growth rate of 2% per annum for comparison floorspace. Figure 3.2 below shows how much expenditure growth may be available for new development over the next 20 years.

Figure 3.2: Growth in Comparison Goods Expenditure in England 2014 to 2034 (£ billion)



3.45 Allowing for growth in multi-channel shopping and increased turnover efficiency, there could still be £33 billion of growth available for new retail development in England over the next 10 years and £72 million over the next 20 years.

3.46 The challenge for town centres generally, and Brentwood specifically, will be to capitalise on this growth by securing much needed investment. There will be continued scope for centres to diversify, for example the evening economy, leisure and entertainment and more focus on convenience and service, but comparison retail will still be the driver of growth in many centres.

3.47 The delivery of town centre redevelopment opportunities will be the priority. There will be a requirement to build more retail floorspace within Brentwood town centre, not only to boost its retail offer and compete effectively with other centres, but also to secure investment in the centre.

Population and Expenditure

3.48 The study area population for 2011 to 2030 is set out in Table 1 in Appendix 2. Population data has been obtained from Experian for each zone based on the 2011 Census. The 2011 base year population for each zone has been projected to 2030 based on the Edge Analytics Greater Essex Demographic Forecasts. This projection assumes 362 dwellings per annum in Brentwood Borough.

3.49 An alternative, high population growth scenario has been tested assuming 413 dwellings per annum in Brentwood Borough, and the higher projections are shown in Table A, Appendix 2.

3.50 Table 2 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2030. Forecasts of comparison goods spending per capita are shown in Table 2 in Appendix 3.

3.51 Based on the baseline population projection, as a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 26% from £161.12 million in 2014 to £202.65 million in 2030, as shown in Table 3 (Appendix 2).

3.52 Based on the baseline population projection, comparison goods spending is forecast to increase by 72% between 2014 and 2030, increasing from £265.24 million in 2014 to £457.19 million in 2030, as shown in Table 3 (Appendix 3).

3.53 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on food and drink does not increase proportionately with disposable income, whereas spending on non-food goods is more closely linked to income.

3.54 These figures relate to real growth and exclude inflation.

Existing Retail Floorspace 2014

3.55 Existing convenience goods retail sales floorspace within Brentwood Borough is 10,514 sq.m net, as set out in Table 10 in Appendix 2. This floorspace figure excludes comparison sales floorspace within food stores. About 63% of this food and grocery sales floorspace is located in Brentwood town centre.

3.56 Comparison goods retail floorspace within Brentwood Borough is estimated to be 20,731 sq.m net, as shown in Table 10 in Appendix 3, of which 78% is located in Brentwood town centre.

Existing Spending Patterns 2014

3.57 The results of the household shopper questionnaire survey undertaken by NEMS in June 2014 have been used to estimate existing shopping patterns within the study area zones. A summary of the methodology and results is shown in Appendix 6.

Convenience Shopping

3.58 The results of the household shopper survey relating to main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 2.

3.59 Table 4 (Appendix 2) indicates the proportion of convenience goods expenditure within each zone that is spent within Brentwood Borough ranges from 80.0% in Zone 1 (Brentwood/Shenfield) to 55.6% in Zone 3 (Ingatestone). The influence of stores outside the Borough is evident, particularly stores in and around Basildon, Chelmsford and Romford.

3.60 The influence of the Sainsbury's store in Brentwood is evident within all zones, attracting 51.8% of the market share within Zone 1, and between 21.6% and 45.3% from the other zones in the study area.

3.61 The level of convenience goods expenditure attracted to shops/stores in Brentwood Borough in 2014 is estimated to be £125.06 million as shown in Table 5, Appendix 2. This includes estimates of inflow from beyond the study area, applying the market shares set out in Table 4.

3.62 The total benchmark turnover of identified existing convenience sales floorspace within Brentwood Borough is £101.16 million (Table 10, Appendix 2).

3.63 These figures suggest that convenience goods retail sales floorspace in the Borough is collectively trading about 24% above average, with a surplus of available convenience expenditure of £23.90 million. Most (about 78%) of this expenditure surplus is located within Brentwood town centre, where food stores are currently trading around 24% above benchmark. The Sainsbury's store in particular is trading around 28% above benchmark. Convenience goods shopping facilities in Shenfield are also trading above benchmark, whilst Warley Hill and Ingatestone are trading below benchmark levels.

3.64 The household survey results suggest local shopping facilities are trading significantly above benchmark. Household surveys of this kind tend to overstate the market share of larger food stores and under-estimate the market share of local shops. However, it may be that some of the "local shops" mentioned in response to questions are actually located within the centres of Ingatestone, Warley Hill or Shenfield. If this is the case, then the trading levels in the district centres may be slightly under-estimated, with less expenditure attracted to local shops.

3.65 On balance the estimate of global surplus expenditure (£23.90 million) within Brentwood Borough as a whole, ie. the difference between the actual spending at retail facilities in the Borough and the benchmark turnover of the facilities, is robust.

Comparison Shopping

3.66 Table 4 (Appendix 3) indicates the proportion of comparison goods expenditure within each zone that is spent within Brentwood Borough ranges from 25.0% in

Zone 3 (Ingatestone) up to 37.8% in Zone 1 (Brentwood/Shenfield). The retention of comparison goods expenditure is generally lower than for convenience goods. This reflects the propensity of customers to do food and grocery shopping locally, whilst for comparison shopping, customers are more likely to shop around and/or travel longer distances to visit larger centres that have more choice. The ability to increase comparison goods market share will be constrained by larger centres in the sub-region.

3.67 The estimated comparison goods expenditure currently attracted by shopping facilities within Brentwood Borough is £94.75 million in 2014, as shown in Table 5, Appendix 3. This includes estimates of inflow from beyond the study area.

3.68 Based on this expenditure estimate, the average sales density for existing comparison goods sales floorspace in the Borough (20,731 sq.m net) is £4,570 per sq.m net. The analysis of existing comparison shopping patterns in 2014 suggests the following average sales density figures for the centres in Brentwood Borough shown in Table 3.1 below.

3.69 Brentwood town centre has the highest comparison goods average sales density, which reflects the stronger presence of national multiples. Local centres generally have a lower trading density, which reflects the predominance of independent traders, but again the household survey results will tend to under-estimate the market share of local shops.

Table 3.1: Comparison Goods Average Sales Densities

Centre	**Average Sales Density 2014 (£ per sq.m net)**
Brentwood Town Centre (incl. Wickes)	£4,863
Shenfield	£2,968
Ingatestone	£1,348
Warley Hill	£1,095
Brentwood Borough Average	£4,570

3.70 There is no evidence to suggest existing comparison sales floorspace is over-trading anywhere in the Borough, or that there is surplus comparison expenditure available to support new development at present.

3.71 The sales density of floorspace within Warley Hill is particularly low, however given its location adjacent to Brentwood Station, it is likely that respondents to the household survey may have referred to their shopping at Warley Hill as shopping within “Brentwood”. This may explain the low sales density attributed to Warley Hill. The sales density is also notably low for Ingatestone. Again, household surveys of this kind tend to overstate the market share of larger centres and under-estimate the market share of local shops and district centres, which may explain the low sales density for Ingatestone.

3.72 On balance, existing floorspace in the Borough appears to be trading satisfactorily in difficult, but improving, market conditions.

Capacity for Convenience Goods Floorspace

3.73 As a minimum it is appropriate and realistic to plan to maintain the Borough's market share of convenience goods expenditure in the future. Planning for a decline in market share would not be sustainable and would not address the needs of local residents. It should be noted that as the forecast increase in internet spending is taken into account in projecting available expenditure in the future, this will have the effect of reducing the actual requirement for additional floorspace.

3.74 Based on constant market shares and baseline population projections, the future level of available convenience goods expenditure at 2015, 2020, 2025 and 2030 is shown at Tables 6, 7, 8 and 9 in Appendix 2.

3.75 The total level of convenience goods expenditure available for shops in the Borough between 2014 and 2030 is summarised in Table 11 (Appendix 2). Convenience expenditure available to shopping facilities in the Borough is expected to increase from £125.06 million in 2014 to £157.29 million in 2030.

3.76 Table 11 subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further development. Within the Borough, there is an expenditure surplus of £17.59 million convenience goods expenditure in 2014. This surplus will increase marginally to £18.49 million in 2015. Continued future growth produces a surplus of £27.97 million in 2020, increasing to £38.47 million in 2025 and £49.82 million in 2030.

3.77 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 12. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £13,000 per sq.m, based on the average turnover of the main food supermarket operators.

3.78 The short to medium term capacity figures up to 2020 suggest surplus of available convenience goods expenditure could support an additional 2,151 sq.m net (3,074 sq.m gross), primarily concentrated in Brentwood town centre. In the long term, surplus expenditure at 2030 could support 3,833 sq.m net of sales floorspace (5,475 sq.m gross) in the Borough as a whole, as shown in Table 11, Appendix 2.

3.79 By way of comparison, the previous Brentwood Retail Study in 2011 suggested a convenience goods floorspace requirement for the Borough of up to 7,484 sq.m gross (4,491 sq.m net) by 2031, based on constant market shares.

Retail Commitments

3.80 Planning permission was granted for the redevelopment of the car park, William Hunter Way for a mix of retail and leisure uses in September 2010 (ref. BRW/729/2008). An application to extend the time limit for implementation of this consent was approved in December 2013 (ref. 13/00784/EXT). The proposed development included a new six-screen cinema, retail stores, multi storey car parking and 14 residential units. The retail element comprised a new food store (3,560 sq.m gross) and three further retail units (with total floorspace of 3,780 sq.m gross).

3.81 However, following a breakdown in the Council's agreement with the developer of the proposals, and a termination of the Development Agreement in February 2014, the consented scheme will not go ahead in its current form. The site will now be re-marketed for development and a new development brief will be prepared. Despite the termination of the development agreement, the planning permission remains extant.

3.82 The Council has resolved (Extraordinary Council Meeting, 7 April 2014) to produce a new "Old Chapel" Masterplan for Brentwood town centre, including the William Hunter Way car park site and the Baytree Centre. The draft strategic objectives of the Masterplan are as follows:

- Enhancement of the public realm and setting of the Old Chapel of St Thomas A Becket, including new, active spaces and street life;
- Complementary redevelopment of sites that are integrated by new and improved public realm;
- Increased connectivity with Brentwood train station and local community facilities;
- New residential life to the town centre;
- Provision of larger shops and stores;
- Provision of a new cinema complex; and
- 'Smarter', easier parking to support local businesses and visitors to the town centre.

3.83 In relation to retail shops, the Council Report stated that *"the retail mix in the town centre is missing large comparison goods stores. The redevelopment of William Hunter Way and the Baytree Centre provides an opportunity for larger retail units. This could include convenience goods in the form of a supermarket."*

3.84 The Council has also undertaken a public consultation exercise between September and November 2014 on the future use of the William Hunter Way site. Feedback and results from this consultation will be used to inform the Council's decisions regarding the future of the site.

3.85 Although the approved William Hunter Way scheme will no longer be delivered, it remains a retail commitment, and any revised scheme is likely to include a similar quantum of retail floorspace. If a new supermarket is retained within any new proposals for this site, it will absorb some of the convenience goods retail capacity identified for Brentwood.

3.86 We are not aware of any other significant retail commitments that will absorb the remaining convenience goods capacity.

Alternative Population Growth Scenario

3.87 The convenience goods floorspace projections set out above (para. 3.78 and Table 11, Appendix 2) are based on Edge Analytics Greater Essex Demographic Forecasts, and assume an increase of 362 dwellings per annum in Brentwood Borough. The implications of adopting the higher growth scenario assuming an increase of 413 dwellings per annum have also been tested.

3.88 Adopting the higher population growth forecast (Table A, Appendix 2) results in around a 2.2% increase in the total population in the study area by 2030. This in turn results in an increase in the level of surplus convenience goods expenditure to support new retail floorspace in the Borough, as shown in Table B, Appendix 2. By 2030, there is an additional £3.36 million of surplus convenience goods expenditure. The implications of this increase in surplus expenditure is a requirement for an additional 257 sq.m net (369 sq.m gross) of convenience goods floorspace in the Borough by 2030, as shown in Table C, Appendix 2. This increased requirement relates primarily to Brentwood town centre, where the floorspace requirement increases from 3,322 sq.m net (4,746 sq.m gross) to 3,522 sq.m net (5,032 sq.m gross).

Capacity for Comparison Goods Floorspace

3.89 The household survey suggests that the Borough's retention of comparison goods expenditure is generally lower than for convenience goods. The lower level of comparison expenditure retention is due to the strength of competing comparison goods facilities in neighbouring authorities, in particular intu Lakeside, Romford and Basildon. The district centres in Brentwood achieve very low market shares, based on the limited and small scale comparison goods offer provided within these centres.

3.90 Future improvements to comparison retail provision within the Borough could help to claw back some additional expenditure leakage from the study area. However, major developments in neighbouring authorities will limit the ability of shopping facilities in the Borough to increase their market share of expenditure. Some retail development will be necessary in Brentwood Borough in order to maintain existing market share in the future. An appropriate strategy for Brentwood should be to seek to maintain existing 2014 market shares for the Borough, in the face of increasing future competition in nearby centres, whilst maintaining the vitality and viability of centres.

3.91 It is realistic and appropriate for the Borough as a whole to plan to maintain market shares. However within the Borough it may be appropriate to readjust the shares of the main centres. For example, the provision of significant levels of retail floorspace in Brentwood may increase the town's market share.

3.92 The Council should plan to maintain the existing role of centres, and in the case of Brentwood seek to strengthen its retail role, while recognising that it falls within the catchment area of higher order regional and major regional centres. The district centres in the Borough should maintain a complementary role supporting these larger centres.

3.93 Based on the baseline population projections, available comparison goods expenditure has been projected forward to 2015, 2020, 2025 and 2030 in Tables 6, 7, 8 and 9 in Appendix 3, and summarised in Table 11. Available comparison expenditure to facilities within the Borough is expected to increase from £94.75 million in 2014 to £163.32 million in 2030.

3.94 For the purposes of this assessment, the existing comparison goods floorspace is estimated to be trading at equilibrium in 2014 (i.e. satisfactory levels), as shown in Table 11 (Appendix 3). Table 11 assumes that the turnover of comparison floorspace will increase in real terms in the future. A growth rate of 2% per annum is adopted, and this growth is required to maintain the health and viability of town centres, as recommended by Experian. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

3.95 Within Brentwood Borough as a whole, by 2020 there will be an expenditure surplus of £6.72 million. This surplus increases to £18.17 million in 2025. By 2030, future expenditure growth generates an expenditure surplus of £33.25 million. The vast majority of this surplus is for Brentwood town centre, with only a very limited amount identified for the rest of the Borough.

3.96 Surplus comparison expenditure has been converted into net comparison sales floorspace projections at Table 12 in Appendix 3, adopting an average sales density of £5,000 per sq.m in 2014, which is projected to grow by 2% in the future due to improved turnover efficiency. The surplus expenditure at 2030 could support 4,844 sq.m net of sales floorspace (6,458 sq.m gross).

3.97 The previous retail study in 2011 suggested a comparison goods floorspace requirement for the Borough of up to 12,731 sq.m gross (7,639 sq.m net) by 2031, based on constant market shares. The updated projections within this study update are significantly lower because of the effects of the recession on expenditure growth between 2011 and 2014 and lower future growth forecasts.

Retail Commitments

3.98 As noted above, planning permission has been granted for the redevelopment of the car park, William Hunter Way for a mix of retail and leisure uses. The retail element comprised a new food store (3,560 sq.m gross) and three further retail units (with total floorspace of 3,780 sq.m gross), which were shown as comparison goods units.

3.99 Although the approved William Hunter Way scheme will no longer be delivered, it remains a retail commitment, and any revised scheme is likely to include a similar quantum of retail floorspace. One of the key objectives of the Old

Chapel Masterplan is to create opportunities for larger, comparison goods units within Brentwood town centre. If a similar scale of retail development is proposed for the William Hunter Way site in the future, it will absorb a significant proportion of the comparison goods retail capacity identified for Brentwood.

3.100 We are not aware of any other significant retail commitments that will absorb the remaining comparison goods capacity.

Alternative Population Growth Scenario

3.101 The comparison goods floorspace projections set out above are based on Edge Analytics Greater Essex Demographic Forecasts, and assume an increase of 362 dwellings per annum in Brentwood Borough. The implications of adopting the higher growth scenario assuming an increase of 413 dwellings per annum have also been tested.

3.102 As set out above, the higher population growth forecast (Table A, Appendix 3) results in around a 2.2% increase in the total population in the study area by 2030. This results in an increase in the level of surplus comparison goods expenditure to support new retail floorspace in the Borough, as shown in Table B, Appendix 3.

3.103 By 2030, there is an additional £3.03 million of surplus comparison goods expenditure. The implications of this increase in surplus expenditure is a requirement for an additional 442 sq.m net (590 sq.m gross) of comparison goods floorspace in the Borough by 2030, as shown in Table C, Appendix 3. Again, this increased requirement relates primarily to Brentwood town centre, where the floorspace requirement increases from 4,568 sq.m net (6,091 sq.m gross) to 4,985 sq.m net (6,647 sq.m gross).

Qualitative Need for Retail Floorspace

3.104 The section above quantifies the theoretical capacity to support new retail floorspace within Brentwood Borough, based on the population projections. The qualitative need for retail facilities also needs to be considered.

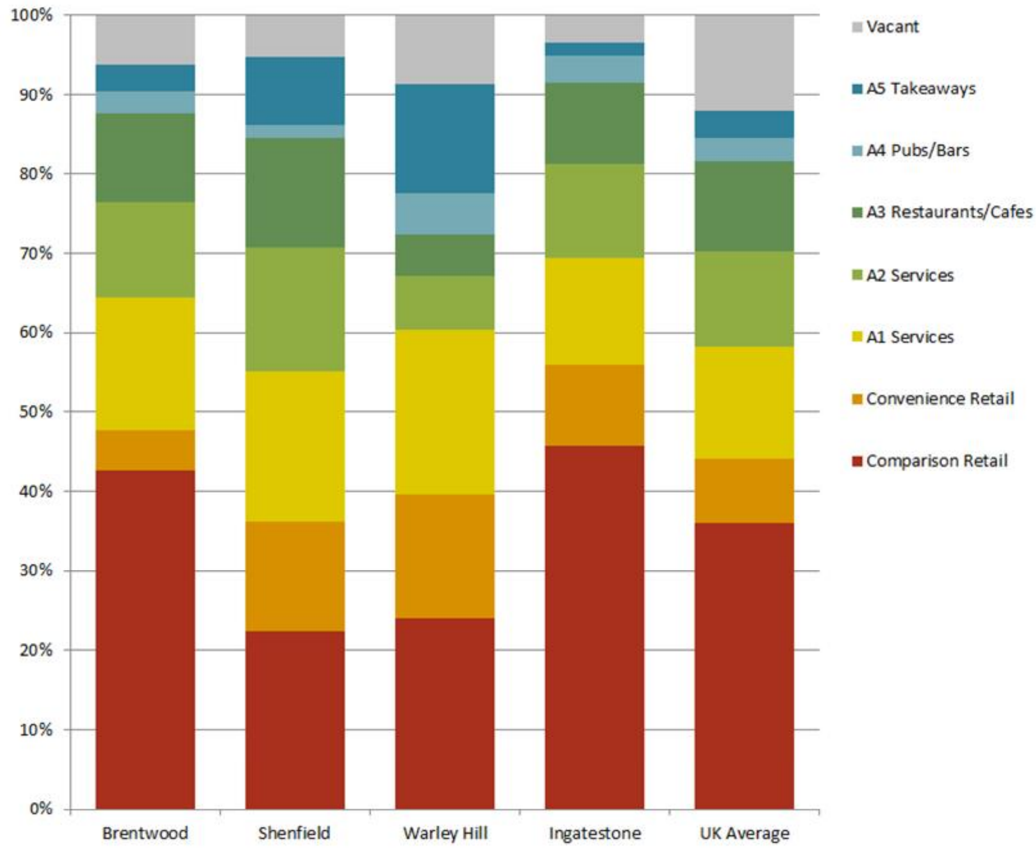
3.105 Qualitative need can be assessed through consideration of the following factors:

- deficiencies or ‘gaps’ in existing provision;
- consumer choice and competition;
- overtrading, congestion and overcrowding of existing stores;
- location specific needs such as underserved markets; and
- the quality of existing provision.

Diversity of Town Centre Uses

3.106 Figure 3.3 overleaf shows the composition of each retail centre in terms of the mix and proportion of different uses, ie. the proportion of shop units within each use class. This is compared to the Goad average mix for all centres across the country.

Figure 3.3: Mix of Uses by Unit (%)



3.107 Brentwood town centre and Ingatestone have a reasonable proportion of comparison shops when compared to the national average. Shenfield and Warley Hill both have a lower proportion of comparison goods, but a higher proportion of convenience goods retail, A1 services and A5 takeaways.

3.108 Generally, larger centres have a higher proportion of comparison shop units than smaller centres. Larger centres tend to have a stronger focus on fashion shopping and therefore have a higher proportion of comparison shops. Smaller centres tend to have a higher proportion of convenience goods units and service uses, serving the local/day to day needs of their catchment area.

3.109 This pattern is generally reflected in Brentwood Borough, with the exception of Ingatestone, which has a higher than average proportion of comparison retail units. Brentwood town centre has a good mix and choice of comparison goods retailers, with a high proportion of clothing and footwear shops. The smaller centres generally have higher proportions of lower order comparison shops, ie. selling items bought on a regular basis, and more independent retailers. The audit of centres in Appendix 5 provides a more detailed breakdown of the uses present in each centre.

3.110 Vacancy rates are relatively low across Brentwood Borough's centres when compared to the national average. In addition, Brentwood, Shenfield and

Inagatestone all appear to have strong evening economies with a relatively high proportion of Class A3 restaurants/cafés.

Convenience Goods Shopping

3.111 The household survey results indicate that most residents in the study area undertake both a main shopping trip and top-up shopping trips. Main shopping trips are generally made once a week or less often, and the household survey identified that 82% of respondents travel to do their main food shopping by car (both driver and passenger). The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large supermarkets or superstores are the usual destination for these types of shopping trip.

3.112 There is only one large food store of over 2,000 sq.m net within the Borough, ie. Sainsbury's, William Hunter Way, Brentwood (6,102 sq.m net). This store dominates shopping patterns within the Borough, and the household survey results indicate that this store attracts over 58% of main food shopping trips for the Borough as a whole.

3.113 The Sainsbury's store is supported by a range of smaller supermarkets and convenience stores within Brentwood town centre, including Co-op, Iceland and Marks & Spencer.

3.114 There is a reasonable range of smaller food stores in the district centres of Shenfield (Co-op and Tesco Express), Ingatestone (Co-op and Budgens) and Warley Hill (Tesco Express).

3.115 The discount food sector is not currently represented in the Borough, with the closest Aldi and Lidl stores located in Romford and Basildon.

3.116 The retail capacity projections set out in Table 11 in Appendix 2 suggest there is surplus convenience goods expenditure in Brentwood at 2014 (£18.59 million). There is limited surplus convenience goods expenditure in Shenfield (£1.51 million), while there is a deficit in Warley Hill (-£1.76 million) and Ingatestone (-£0.76 million) based on existing market shares. This suggests that the short term quantitative capacity for further convenience goods floorspace is located within Brentwood town centre. In the medium to longer term, the surplus expenditure increases in Brentwood (£43.18 million by 2030), Shenfield (£3.30 million by 2030) and a limited amount in Ingatestone (£0.38 million by 2030).

3.117 The audit of main centres in Appendix 5 indicates that the centres have a good choice of convenience goods shops, ranging from six outlets in Ingatestone to 13 outlets in Brentwood town centre. There are no obvious areas of deficiency in food store provision. The qualitative assessment suggests the priority for short to medium term food store development should be within Brentwood town centre, where the Sainsbury's store dominates the convenience retail provision.

High Street Comparison Shopping

3.118 An assessment of the shopping hierarchy is shown in Section 2 and an audit of the shopping facilities within the main centres is shown in Appendix 5. Brentwood is the main high street comparison shopping destination within the Borough in terms of the number of outlets, sales floorspace and representation of multiple retailers. Shenfield, Ingatestone and Warley Hill to a lesser extent provide residents with a more limited comparison goods offer. The centres in Brentwood Borough are smaller than larger centres surrounding the Borough, in particular Basildon, Romford, Chelmsford and intu Lakeside, which are accessible to residents within the Borough and have a more extensive range of multiple retailers than Brentwood. Many residents within the Borough are likely to continue to shop outside the Borough in these higher order centres.

3.119 The centre audits in Appendix 5 identify that Brentwood and Ingatestone have a higher proportion of comparison retail units compared with the national average. Brentwood has the best representation of comparison goods retailers, including a number of national multiples, complemented by a range of independent traders. Comparison retailers in Ingatestone, Shenfield and Warley Hill are predominantly small independent traders.

3.120 Brentwood town centre has representation in most comparison goods categories and there is generally a choice of outlets within each category (110 comparison shops in total). The clothing and footwear sector is well represented with 29 shops. Brentwood has a reasonable mix of lower and higher order comparison goods. Lower order comparison goods are items bought on a regular basis, where customers are less likely to shop around or travel long distances to shop. Higher order goods tend to be higher value items bought occasionally, where customers window shop and compare prices and goods. Healthy town centres usually have a good mix of higher and lower order comparison goods shops.

3.121 There is a reasonable range and choice of comparison shops in Ingatestone (27 in total), with limited choice within each goods category. Shenfield (13 units) and Warley Hill (14 units) have a more limited selection of comparison shops, and most are small independent traders and shops selling lower order comparison goods, such as pharmaceutical goods, flowers and other day to day items.

Retail Warehouses and Bulky Goods

3.122 The Borough has only very limited retail warehousing provision, comprising the Wickes store, Brook Street, Brentwood.

3.123 Brentwood Borough is therefore predominantly served by bulky goods retail warehouse units located outside of the Borough, particularly the retail parks in Basildon, Romford and Chelmsford. There may be scope to improve bulky goods retail warehousing in the Borough when the economic climate improves.

3.124 Any out-of-centre retail warehouse proposal would need to be considered on its individual merits. The applicant would need to clearly demonstrate that the nature of retail floorspace proposed cannot be adequately accommodated within existing centres, allowing scope for disaggregation and flexibility, and that the development would not harm designated centres.

4.0 Requirements for Other Town Centre Uses

Introduction

4.1 This section assesses the potential for commercial leisure and other town centre uses in Brentwood Borough, including for a cinema, tenpin bowling, bingo, theatres, nightclubs, private health and fitness clubs and catering, pubs and bars.

Commercial Leisure

4.2 There is a relatively limited range of commercial leisure and entertainment facilities within the Borough itself, with many residents utilising facilities in neighbouring authorities.

4.3 Based on NLP's experience and household surveys from across the country, commercial leisure facilities usually draw the main part of their trade from residents up to a 20 minutes travel time. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres and family entertainment centres require a large catchment population, and often benefit from locating together or on large out of centre leisure parks.

4.4 Brentwood Borough's population has good access to major leisure facilities in Basildon, Romford, Chelmsford and intu Lakeside. The proximity of major leisure facilities in these surrounding local authorities may limit the potential for major commercial leisure facilities within the Borough.

Cinemas

4.5 There are no mainstream cinemas in Brentwood Borough. The household survey results indicate that most residents within the study area visit cinemas in Basildon (27.6%), Romford (11.8%), intu Lakeside (8.0%) and Chelmsford (8.6%).

4.6 Large multiplex cinemas in competing settlements, including Basildon, Romford, intu Lakeside and Chelmsford will restrict the catchment area of potential additional cinema provision within Brentwood Borough.

4.7 To assess the theoretical demand for cinema provision within the Borough, it is assumed that up to 60% of cinema trips can be retained within the area. The area's catchment population has been converted into a total number of cinema screens and seats based on the current national average (16,300 people per screen and 78 people per seat – NLP CineScope). The results are shown in Table 4.1 below.

Table 4.1 Cinema Potential in Brentwood Borough

	2015	2020	2025	2030
Study Area Population	76,426	79,957	83,487	87,018
Market Retention	60%	60%	60%	60%
Catchment potential	45,856	47,974	50,092	52,211
Cinema Screen Potential	**2.8**	**2.9**	**3.1**	**3.2**
Cinema Seat Potential	**588**	**615**	**642**	**669**

4.8 The analysis above suggests there is theoretical scope for a cinema with around three screen, if the Borough can attract 60% of cinema trips within the study area, and it would be desirable to locate a cinema within the Borough to claw back trips that are currently going to the existing large cinemas in Basildon, Romford, intu Lakeside and Chelmsford.

4.9 As noted in the previous section, the proposals for the redevelopment of the site at William Hunter Way, Brentwood included a six-screen cinema. While the above assessment of cinema potential only shows a requirement for three cinema screens within Brentwood over the Plan period, it is likely that a larger cinema would be a more viable option. The development of a larger cinema and leisure attraction at William Hunter Way would increase the level of retention of cinema trips within Brentwood Borough and further reduce the leakage to other destinations outside of Brentwood. In addition, a larger cinema is likely to attract people from outside the Borough. Table 4.2 below shows that if the market retention within the Borough is increased to around 90%, and there is an inflow of cinema trips from those outside the Borough of around 20%, a cinema with six screens could be supported.

Table 4.2 Cinema Potential in Brentwood Borough

	2030
Study Area Population	87,018
Market Retention	90%
Catchment potential	78,316
Inflow (20%)	19,579
Total potential	97,895
Cinema Screen Potential	**6.0**
Cinema Seat Potential	

4.10 On this basis, the provision of a larger cinema with six screens would be appropriate for the Borough.

Theatres

4.11 Brentwood Theatre is the only theatre located within the Borough. The household survey indicates that 50.2% of respondents in the study area last visited a theatre in Central London, followed by the Queen’s Theatre in Hornchurch (6.0%), Brentwood Theatre (3.0%) and Chelmsford Civic Theatres (2.2%).

4.12 The close proximity of Brentwood Borough to Central London has an impact on the likely demand for theatre facilities in the Borough. The relatively short journey to Central London will help meet the Borough’s need for high profile, national performances. There is therefore not considered to be a clear need for additional theatre provision in the Borough, however if proposals were brought forward they should be supported as they would enhance the overall offer of Brentwood.

Private Health and Fitness Clubs

4.13 There are a number of gyms and health clubs within the Borough, as highlighted by the household survey results, as follows:

1 LA Fitness, Chindits Lane, Warley;

2 Fitness First, The Baytree Centre, Brentwood;

3 The Brentwood Centre, Doddinghurst Road, Brentwood;

4 Ashwells Sport and Country Club, Ashwells Road, Brentwood;

5 Brentwood School Sports Centre, Middleton Hall Lane, Brentwood;

6 Virgin Active, Little Warley Hall Lane, West Horndon;

7 Spirit Health Club / Holiday Inn, Brook Street Road, Brentwood;

8 Mortons Personal Fitness, High Street, Brentwood;

9 Curves, High Street, Brentwood; and

10 Mortons Personal Fitness, Tallon Road, Hutton.

4.14 Brentwood Borough’s adult population (18 and over) is approximately 59,700 in 2014, which could generate demand for about 7,200 public and private gym membership places, based on the national average membership rate (12%). Information provided by Sport England’s Local Sport Profile Tool suggests that the proportion of adults in Brentwood who are physically active (63.2%) is higher than the England average (56.6%). Similarly, the participation in sport (at least once a week) in Brentwood is 42.5%, compared to the England average of 35.7%. On this basis, while it is reasonable to adopt the national average membership and participation rates, these are likely to be lower than the actual participation levels in Brentwood.

4.15 This potential membership estimate and the ten health and fitness clubs identified above, imply an average of around 720 members per club, which is lower than the national average for private fitness clubs (1,375 members). These figures suggest there is an adequate supply of gyms and health clubs within the Borough for the foreseeable future.

Tenpin Bowling

4.16 The Borough has no tenpin bowling facilities. Residents in the Borough have access to facilities in Basildon (Basildon Bowl and Hollywood Bowl), Chelmsford (Tenpin) and Romford (Namco and The City Pavilion). The household survey results suggest that about 27% of households in the study area visit tenpin bowling facilities.

4.17 The study area population (75,720 in 2014) can in theory support about six lanes, based on the national average of one lane per 12,000 people.

4.18 Based on the lack of provision of tenpin bowling facilities within Brentwood, there may be potential for a tenpin bowling facility within the Borough. However given the proximity of facilities in nearby centres, which are generally combined with other leisure attractions, it may not be viable for a facility within Brentwood to compete with these other attractions.

Bingo

4.19 There are no mainstream bingo facilities in Brentwood Borough, and 96% of respondents to the household survey stated that they do not play bingo. Residents in the Borough have access to facilities in Basildon (Gala) and Romford (Mecca).

4.20 Brentwood Borough's adult population (about 59,700 adults) could generate about 104,475 admissions based on the national participation rate (1.75 per adult).

4.21 Based on national average figures (113,000 admissions per club), Brentwood Borough could support one bingo facility. However, the existing bingo provision around Brentwood and the relatively low participation rates suggests there is limited demand for additional facilities, and we do not consider that there is a need to plan for the provision of new bingo facilities.

Nightclubs

4.22 There are approximately 1,750 nightclubs in the UK, approximately one per 30,000 people (source: Mintel). Large nightclubs (capacity of up to 2,000 people) are generally located in large towns with a population of over 100,000 people. There are two nightclubs in Brentwood Town Centre (Eclipse and Sugar Hut). The reality television show "The Only Way is Essex" (TOWIE) has led to nightclubs within Brentwood, particularly Sugar Hut, having a unique demand that attracts visitors from a wider than usual area, beyond the local catchment. Residents in the Borough also have access to a large number of nightclubs in Central London and Chelmsford.

4.23 Given the popularity of the existing facilities, and the demand that is unique to Brentwood's association with TOWIE, there may potentially be a requirement for additional nightclubs in Brentwood Town Centre to meet this demand.

Other Services, Restaurants, Bars and Takeaways

4.24 Service uses perform an important role in the overall offer of a centre, and encourage customers to shop locally. The service uses are categorised as follows:

- **Class A1 services** cover a range of uses, including hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as Class A3), funeral parlours and post offices.
- **Class A2 services** include banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies.
- **Class A3/A5** includes restaurants, cafés (A3) and takeaways (A5).

- **Class A4** pubs/bars (Class A4).

4.25 Food and beverages is a fast moving and creative sector, with a steady flow of new concepts emerging. Within this sector there has been a significant increase in the number of national multiple chains. These national chains have sought to increase their geographical coverage. These types of food and drink operators (Class A3 and A4) i.e. restaurants, bars and pubs have supported other major leisure uses, in particular cinema developments. Within town centres the demand has increased, including a significant expansion in the number of coffee shops, such as Starbucks, Costa Coffee, Caffé Nero and Coffee Republic.

4.26 National branded pub/restaurant chains have invested heavily and not exclusively in larger centres. Themed restaurants have also expanded rapidly. The key categories for food and beverage offers are:

1 **impulse:** characterised by their produce range that is typically highly visual and hand-held so that it can be eaten “on the go”;

2 **speed eating fast food:** food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;

3 **refuel and relax:** a drink and snacks and a short break in a pleasant environment rather than focusing on eating a main meal; and

4 **casual dining/leisure dining:** incorporating a number of food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

4.27 Food and drink establishments (Class A3, A4 and A5) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks and are important services within town and local centres. National information available from Experian Goad indicates that the proportion of non-retail uses within town centres across the country has increased significantly. A balance between Class A1 and Class A3 to A5 uses needs to be maintained. The mix of uses in the main centres in the Borough is shown in Table 4.2.

4.28 Brentwood town centre’s proportion of restaurants/cafés (A3), pubs/bars (A4) and takeaways (A5) closely mirror the national average. The proportion of takeaways within Shenfield and Warley Hill are notably higher than the national average. Shenfield also has a high proportion of restaurants/cafés, while Warley Hill has a low proportion of these uses. Ingatestone has a reasonable number of restaurants/cafés and pubs/bars, but a low proportion of takeaways.

Table 4.3 Brentwood Borough Centres Use Class Mix

Type of Unit	Proportion of Total Number of Units (%)				
	Brentwood	Shenfield	Ingatestone	Warley Hill	UK
Class A1 (Retail)	47.7	36.2	55.9	39.6	44.1
Class A1 (Services)	16.7	19.0	13.5	20.7	14.1
Class A2	12.0	15.5	11.9	6.9	12.1
Class A3	11.2	13.8	10.2	5.2	11.3
Class A4	2.7	1.7	3.4	5.2	2.9
Class A5	3.5	8.6	1.7	13.8	3.4
Vacant	6.2	5.2	3.4	8.6	12.1
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Experian Goad, NLP Survey 2014

Food and Drink Expenditure

4.29 Experian's latest 2012 local expenditure figures have been adopted. Food and drink expenditure per capita projections are shown in Table 1, Appendix 4. These figures indicate that the average expenditure in the study area for food and drink consumed away from the home plus takeaways eaten at home is £1,206 per capita in 2014. The total food and drink expenditure in the study area is £91.35 million.

4.30 Food and drink expenditure per capita is expected to increase in real terms (excluding inflation) by 25% between 2014 and 2030. Taking into account population growth, total food and drink expenditure within the study area is expected to increase from £91.35 million in 2014 to £131.14 million in 2030, an increase of about 44% (Table 2, Appendix 4).

Food and Drink Expenditure Patterns

4.31 Existing food and drink expenditure patterns have been modelled based on the household survey results within the study area zones. Warley Hill was not mentioned as a separate destination for food and drink trips in the household survey results and therefore falls within the "other Brentwood Borough" category.

4.32 Base year (2014) penetration rates are shown in Table 3, Appendix 4 and expenditure patterns are shown in Table 4. The estimated expenditure currently attracted to facilities within Brentwood Borough is £65.86 million in 2014. The retention rate is relatively high across all zones, ranging from 52.3% to 74.3%. There is likely to be limited potential to increase market share in the future.

Future Food and Drink Capacity

4.33 The household survey suggests that the Borough's retention of food and drink expenditure is reasonably high. An appropriate strategy for Brentwood Borough is to seek to maintain existing market shares, and the capacity projections in Appendix 4 are based on this approach.

4.34 Available food and drink expenditure has been projected forward to 2030 based on constant 2014 market shares in Tables 4 to 8. Existing facilities are expected to increase their turnover by 1% per annum. Future available expenditure is compared with the projected turnover of existing facilities in Table 9 in Appendix 4.

4.35 Surplus expenditure has been converted into floorspace projections in Table 10, Appendix 4, using an average sales density of £5,000 per sq.m, inflated by 1% per annum. The floorspace projections are broken down in Table 4.4 below.

Table 4.4 Food and Drink Floorspace Projections

Centre	Floorspace (sq.m gross)			
	By 2015	By 2020	By 2025	By 2030
Brentwood	126	766	1,428	2,112
Shenfield	18	112	209	309
Ingatestone	11	67	125	185
Rest of Borough	21	126	235	347
Total	**175**	**1,071**	**1,997**	**2,954**

Other Class A1 and A2 Service Uses

4.36 The retail, food and drink floorspace projections do not include non-retail Class A1 services or Class A2 services. Based on the Goad national average, one would expect around 20% of shop premises to be occupied by these uses within centres, or about 10% of total floorspace.

4.37 The proportion of Class A1 and Class A2 services is relatively high in Brentwood (31.7%) and Shenfield (34.5%), compared with the Goad national average of 26.2%. The figures for Ingatestone (25.4%) and Warley Hill (27.6%) are closer to the national average.

4.38 Given the relatively high provision of Class A1/A2 service uses in the Borough, development should provide around 10% of floorspace for these uses.

Conclusions

4.39 It is important to maintain a reasonable proportion of leisure and service uses in the Borough and additional floorspace should be provided over the plan period.

4.40 There is a potential requirement for an additional 2,954 sq.m gross of Class A3/A4/A5 floorspace in the Borough up to 2030.

4.41 The commercial leisure assessment concludes that as there are currently no cinema facilities within the Borough, a cinema would be desirable to meet the needs of local residents. There is limited potential for other large scale commercial leisure facilities over the plan period.

5.0 Accommodating Growth

Introduction

5.1 The National Planning Policy Framework (NPPF) indicates (paragraph 23) that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres. The need for development should be met in full and should not be compromised by limited site supply. In order to accommodate growth, local planning authorities should assess the need to expand town centres to ensure a sufficient supply of suitable sites. The NPPF (paragraphs 23 and 24) indicates local planning authorities should apply a sequential approach for development.

5.2 The National Planning Policy Guidance indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through expanding centres, with the sequential test to be followed.

5.3 The PPG acknowledges that not all successful town centre regeneration projects are retail-led, or will involve significant new developments. Public realm, transport and accessibility improvements can play important roles. Town centre car parking strategies, in a move away from resisting parking in town centres, are to encourage improvements to both the quality and quantity of car parking provision, where required to enhance the performance of town centres.

5.4 This section assesses the scope to accommodate growth within and on the edge of Brentwood's main centres.

Floorspace Projections

5.5 The floorspace projections set out in the previous sections assume that new shopping facilities within Brentwood Borough can maintain their current market share of expenditure within the study area, recognising that other competing centres will improve in the future. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- major retail developments in competing centres;
- the re-occupation of vacant retail floorspace;
- the availability of land to accommodate new development;
- the reliability of long term expenditure projections;
- the effect of internet/home shopping on the demand for retail property;
- the level of operator demand for floorspace in Brentwood Borough;

- the likelihood that Brentwood Borough's existing market share of expenditure will change in the future in the face of increasing competition; and
- the potential impact new development may have on existing centres.

5.6 The PPG suggests town centre strategies should plan for a 3-5 year period, but the longer term plan period should be considered. Projections up to 2020 are realistic and are based on up to date forecasts, which take into account the effects of the recession. The long term floorspace projections (up to 2025 and beyond) should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development management decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review.

5.7 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading have been excluded. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. The impact of internet growth on the demand for retail floorspace is unclear. Some retailers' home delivery and internet services utilise existing stores rather than warehouses, for example Tesco Direct. Growth in internet sales will not always reduce the demand for shop floorspace. In addition, some of the growth in internet sales may divert trade away from mail order companies rather than retail operators. Overall the long term impact of home shopping on expenditure projections is uncertain.

5.8 The quantitative and qualitative assessment of the potential for new retail floorspace within the previous sections suggests there is scope for new retail development within Brentwood Borough during the Plan period (to 2030). This section examines the opportunities for accommodating this projected growth and assesses potential to accommodate this floorspace.

5.9 The projections up to 2030 suggest there is scope for 5,475 sq.m gross of convenience goods floorspace, 6,458 sq.m gross of comparison goods floorspace and 2,954 sq.m gross of Class A3 to A5 space.

5.10 These projections relate to Class A1 retail uses and Class A3 to A5 uses only. Based on the current mix of floorspace within centres in Brentwood Borough, there should also be scope for around 10% of additional floorspace that can be occupied by Class A1 non-retail services and Class A2 uses. Table 5.1 below summarises the floorspace projections by centre in 2030.

Table 5.1: Summary of Floorspace Projections 2030 (sq.m gross)

Centre	Convenience	Comparison	Food/Drink	Service Uses	Total
Brentwood	4,746	6,091	2,112	1,439	14,388
Shenfield	363	128	309	89	889
Ingatestone	41	102	185	36	364
Warley Hill	- 137	45	115*	3	26
Other Brentwood	463	92	232	87	874
Total	**5,475**	**6,458**	**2,954**	**1,654**	**16,541**

Source: Table 11 in Appendix 2 and Appendix 3, Table 4.3, Section 4
Notes: Baseline population projections
* Assumes 1/3 of "Other Brentwood" food and drink floorspace directed to Warley Hill

Accommodating Future Growth

5.11 The sequential approach suggests that designated town centres should be the first choice for retail and leisure development. In accommodating future growth, the following issues should be taken into consideration:

- What is the locational area of need the development seeks to serve and what existing centre could potentially fulfil the identified area of need?
- Is the nature and scale of development likely to serve a wide catchment area?
- Is a site available in one of the designated centres, including vacant premises and will this site meet the identified need?
- If the development has a more localised catchment area, is a site available in a local centre and will this site meet the identified need?

5.12 All development should be appropriate in terms of scale and nature to the centre in which it is located.

5.13 The existing stock of premises will have a role to play in accommodating projected growth, during the economic recovery. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. For comparison goods, a growth rate of 2% per annum is assumed. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

5.14 There are currently 26 vacant shop units within the four main centres (Brentwood, Shenfield, Ingatestone and Warley Hill), which equates to an overall vacancy rate of just 6.0%, which is much lower than the Goad national average (12.1%). Given the existing low levels of vacant floorspace within the centres, it is unrealistic to plan to achieve a reduction in vacancy rate.

Development Opportunities

Brentwood

5.15 Brentwood is the main town centre in the Borough and it has the best prospects for attracting investment. The town centre should be the main focus for future town centre development, particularly comparison retail floorspace.

5.16 As set out in Table 5.1 above, the capacity assessment identifies that there is a projection for around 14,388 sq.m gross of A1-A5 floorspace in Brentwood by 2030, based on constant market shares.

5.17 The main development opportunity within Brentwood town centre is the William Hunter Way car park site. This has been identified for development for a number of years, and as set out in Section 3.0, there is an extant planning permission to develop the site to include 7,340 sq.m gross of convenience and comparison goods floorspace, plus a cinema and an element of food and drink. Although this application will no longer be progressed, it is likely that any future proposals will incorporate a similar quantum of retail floorspace. The planning permission includes a new food store (3,560 sq.m gross), however in our view it may be more appropriate for the focus to be on providing a greater proportion of comparison goods floorspace within the amended proposals for the site, strengthening the town's high street offer.

5.18 A retail/leisure development on the William Hunter Way site would need to ensure there are improved pedestrian links through to the High Street. Any redevelopment scheme would need to re-provide car parking on part of the site in the form of multi-level parking. The provision of multi-level car parking could free up a significant part of the site for new town centre uses. The area could potentially accommodate around 8,000 sq.m gross of commercial floorspace (retail plus food and drink) as well as leisure floorspace. If developed comprehensively, this area could accommodate a significant proportion of the projected capacity for Class A uses in Brentwood up to 2030.

5.19 The Baytree Centre is currently underutilised, with a number of vacant retail units, despite its prime location on the High Street. Approximately 1,000 sq.m gross of the floorspace within the centre is currently vacant. In the longer term, there may be potential to redevelop this centre to create a scheme that is more attractive to retail operators and customers. However, the site is constrained due to the adjacent Chapel Ruins and residential properties above part of the centre. Redevelopment is unlikely to lead to a substantial increase in physical retail floorspace, but if redeveloped or reconfigured to make the centre more attractive, it is reasonable to assume that the vacant floorspace would be utilised. This site could therefore absorb around 1,000 sq.m of the retail floorspace projection for Brentwood. If a more significant development scheme incorporated adjacent land along South Street, there may be potential to increase the uplift in retail floorspace by around 1,000 sq.m gross.

5.20 We understand that the aspiration for the area around the Baytree Centre is to incorporate restaurant/café uses, creating more of a destination shopping experience. Diversification of the High Street offer is critical for ensuring that

Brentwood town centre remains an attractive destination. The eastern end of the High Street in particular could become more of a non-retail quarter, building on the existing leisure uses in this part of the town centre.

5.21 As noted in Section 3.0, we understand that Lidl has purchased a site at Wates Way. Although this is within the town centre, it is considered to be an edge of centre site in retail terms as it is not within the prime shopping area. While any application for retail development that is not within the town centre would need to be properly assessed, it would benefit the convenience retail offer of Brentwood town centre if another supermarket is provided. Based on a typical Lidl store size, this could potentially absorb around 1,500 sq.m of the identified convenience goods floorspace requirement for Brentwood.

5.22 Within the rest of Brentwood town centre, development options appear to be limited and constrained by its historic environment/conservation area, street layout and neighbouring residential areas. Windfall opportunities may become available, but are likely to be small scale (less than 500 sq.m gross). The future focus for the existing primary shopping area is likely to be small scale intensification and extensions, e.g. extension to service areas to the rear.

5.23 If Brentwood cannot accommodate the floorspace projection within the town centre, then the Council could seek to allocate sites elsewhere within the Borough to accommodate the long term projections. For example it may be appropriate to direct an element of Brentwood's floorspace projections to the district centres or to major residential developments. This potential is considered below. An element of new floorspace could also be directed to existing village centres within the Borough.

Shenfield

5.24 As set out in Table 5.1 above, the capacity assessment indicates 889 sq.m gross of Class A1-A5 floorspace could be provided in Shenfield by 2030.

5.25 Shenfield district centre will benefit from the new Crossrail scheme, and this may present opportunities for retail provision. Given the surrounding retail uses, there appears to be limited scope for any significant development opportunities.

5.26 Small windfall opportunities may become available. The future focus is likely to be small scale intensification and extensions. If this cannot be accommodated within the centre, then the Council should look to allocate sites elsewhere within the Borough to meet the forecast projections.

Inagatestone

5.27 The capacity assessment summarised in Table 5.1, shows a Class A1 to A5 projection of 364 sq.m gross in Inagatestone by 2030, based on constant market shares.

5.28 This represents only a limited requirement for additional floorspace within Ingatestone, and we do not consider that it is necessary to identify development opportunities. In any event, we consider that development options in the centre are limited. The future focus is likely to be small scale intensification and extensions.

Warley Hill

5.29 The capacity assessment summarised in Table 5.1 identifies a Class A1 to A5 floorspace requirement of just 26 sq.m gross in Warley Hill by 2030. There is no need to identify locations within the centre to accommodate additional floorspace over the Plan period.

Strategic Residential Allocations

5.30 In order to meet the identified housing needs for the Borough up to 2030, it is likely that strategic housing allocations need to be made. We understand that this could theoretically include up to 2,000 new houses at West Horndon. Existing retail provision within West Horndon is limited, and if a large housing development takes place, it would be appropriate to direct some of the identified retail floorspace requirements for the Borough to serve this location.

5.31 Table 5.2 below estimates the retail expenditure that could be generated by this residential development in total, and then estimates how much of this spending that could realistically be retained within any local provision provided within the development. Table 5.2 converts retained expenditure into floorspace requirements. In undertaking these calculations, the following assumptions have been made:

1 the needs of the new residential development has been considered in isolation, with no inflow from existing residents in the surrounding area;

2 development will be completed between 2015 and 2030, and the Brentwood Borough average household size (2.4) for the proposed new development is adopted;

3 available convenience and comparison goods expenditure per person is based on the average for the five study area zones in 2030 (Table 2, Appendix 2 and 3);

4 not all of the convenience and comparison goods expenditure will be available to support local retail facilities in the proposed new housing development, as expenditure will continue to be attracted to other centres and existing superstores;

5 given the size of the residential developments and using our judgement based on schemes elsewhere, up to 25% of convenience goods expenditure and 10% of comparison goods expenditure could be retained to support the proposed local retail floorspace;

6 for convenience goods, the estimated retention figure reflects the fact that top-up convenience shopping in particular can be carried out locally where appropriate facilities are provided;

7 for comparison goods, a much lower proportion of available expenditure will be retained, recognising that while the scale of any centres proposed within the residential development are such as to justify an element of comparison shopping, consistent with the role of the centres, they would

not offer the full range of higher order comparison shopping provided by centres at the upper end of the retail hierarchy; and

8 an average sales density for local shopping facilities of £5,000 per sq.m have been applied, to convert the retained expenditure to floorspace requirements.

Table 5.2: Potential Retail Floorspace Requirements within Strategic Residential Development

	Strategic Residential Development
Population	
No. of dwellings	2,000
Average household	2.4
Total Population	4,800
Convenience Goods	
Convenience Goods Expenditure per capita at 2030	£2,359
Total Available Convenience Goods Expenditure	£11.32 million
Retained Convenience Goods Expenditure (25%)	£2.83 million
Convenience Goods Floorspace Turnover, £ per sq.m	£5,000
Floorspace sq.m net	566 sq.m net
Floorspace sq.m gross	809 sq.m gross
Comparison Goods	
Comparison Goods Expenditure per capita (2030)	£5,315
Total Available Comparison Goods Expenditure	£25.51 million
Retained Comparison Goods Expenditure (10%)	£2.55 million
Comparison Goods Floorspace Turnover, £ per sq.m	£5,000
Floorspace sq.m net	510 sq.m net
Floorspace sq.m gross	680 sq.m gross

5.32 The provision of local shopping facilities is appropriate within developments of this size, in order to ensure residents have day to day shops and services within walking distance of their home, which will reduce car travel.

5.33 Table 5.2 indicates that the number of new dwellings proposed is sufficient to support around 1,500 sq.m gross of retail floorspace. This is similar in scale to Shenfield or Warley Hill. A centre of this size would account for around 12.5% of the Borough's total retail (Class A1) floorspace projection up to 2030 (11,933 sq.m gross).

5.34 Centres of this scale would not be capable of meeting both main and top-up convenience shopping needs. Typically, local centres serving relatively small catchments would primarily serve top-up food shopping needs. Local centres may typically include a small convenience store under the Sunday Trading Act threshold (280 sq.m net), supported by small units such as a butchers, greengrocers, newsagents etc. and a limited range of comparison and service units typically found in local centres such as a chemist, hairdressers, post office, take away, dry cleaners etc.

5.35 The figures in Table 5.2 suggest a total requirement of around 1,500 sq.m gross of retail floorspace. Non-retail services (Class A2 to A5) could increase the size of centre to over 2,000 sq.m gross.

5.36 Although the population within a strategic residential development scheme could potentially support a local centre, it is essential to ensure that any local centre proposed is both commercially viable and capable of delivery. Further work would need to be produced to support any planning application for retail floorspace in this location to demonstrate that the development proposed is appropriate in terms of its scale and position within the development, the context of the surrounding area, and whether it is likely to be of interest to retailers.

6.0 Conclusions and Recommendations

Introduction

6.1 This report provides an update of the Borough wide needs assessment for retail and commercial leisure development in Brentwood Borough. The principal conclusions of the analysis contained within this study are summarised below.

Meeting Shopping Needs in Brentwood Borough

6.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development over the plan period up to 2030.

6.3 When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

6.4 Long term forecasts up to and beyond 2025 may be more susceptible to change, due to unforeseen circumstances. Long term projections should be monitored and kept under review. The implications of major retail development within and surrounding the Borough should be monitored along with the effect proposals may have on the demand for additional development in Brentwood Borough.

Floorspace Projections

6.5 The quantitative assessment of the potential capacity for retail floorspace suggests that there is scope for new development within Brentwood Borough. Although the William Hunter Way scheme has planning permission and remains a commitment, given that it will not proceed in its current form, it has not been taken into account in the following floorspace projections.

6.6 The convenience goods projections, based on constant markets shares, suggest new floorspace could be distributed as follows:

Table 6.1: Convenience Goods Retail Floorspace Projections (Gross)

Location	Additional Convenience Retail Floorspace (sq.m gross)			
	2014 - 2020	2020 - 2025	2025 - 2030	Total 2014 - 2030
Brentwood	2,913	880	953	**4,746**
Shenfield	230	64	69	**363**
Ingatestone	- 43	41	43	**41**
Warley Hill	- 175	18	20	**- 137**
Other Brentwood	149	151	163	**463**
Total	**3,074**	**1,154**	**1,248**	**5,476**

Source: Table 12, Appendix 2

6.7 The comparison goods projections, based on constant markets shares, suggest new floorspace could be distributed as follows:

Table 6.2: Comparison Goods Retail Floorspace Projections (Gross)

Location	Additional Comparison Retail Floorspace (sq.m gross)			
	2014 - 2020	2020 - 2025	2025 - 2030	Total 2014 - 2030
Brentwood	1,500	2,176	2,415	**6,091**
Shenfield	31	46	51	**128**
Ingatestone	25	37	40	**102**
Warley Hill	11	16	18	**45**
Other Brentwood	23	33	36	**92**
Total	**1,590**	**2,308**	**2,560**	**6,458**

Source: Table 12, Appendix 3

6.8 The Class A3/A5 food/drink and other non-retail services projections, suggest new floorspace could be distributed as follows:

Table 6.3: Non-Retail Service Floorspace Projections (Gross)

Location	Additional Non-Retail Service Floorspace (sq.m gross)			
	2014 - 2020	2020 - 2025	2025 - 2030	Total 2014 - 2030
Brentwood	1,341	1,075	1,134	**3,551**
Shenfield	153	120	124	**398**
Ingatestone	72	73	76	**221**
Warley Hill	28	44	45	**118**
Other Brentwood	113	102	105	**319**
Total	**1,708**	**1,414**	**1,485**	**4,607**

Source: Tables 4.3 and 5.1

6.9 The William Hunter Way car park site is the main development opportunity in Brentwood town centre to accommodate the medium to long term floorspace projections. As set out in Section 5 above, up to 2,000 sq.m gross of the floorspace projections could be provided within a new local centre to serve potential new strategic residential development around West Horndon.

Strategy Recommendations

Brentwood town centre

6.10 As set out in Tables 6.1 – 6.3 above, the floorspace capacity projection is 14,388 sq.m gross of additional Class A1 to A5 floorspace in Brentwood Town Centre up to 2030. The short term projection is 5,754 sq.m gross up to 2020.

6.11 Vacant shop units can only accommodate a small element of this floorspace projection. Small scale developments e.g. extensions, in-fill and changes of use could help to accommodate short term requirements.

6.12 In the medium and longer term the redevelopment potential of the William Hunter Way car park site is capable of meeting more than half of the floorspace projection in Brentwood up to 2030. Redevelopment or reconfiguration of the Baytree Centre could potentially absorb a further 2,000 sq.m gross of the floorspace projection for the town centre.

6.13 Table 6.4 provides a summary of the floorspace requirements for Brentwood Town Centre, and the potential floorspace that could be absorbed through the proposed developments that may come forward in the town centre over the Plan period. If all these schemes were developed, there remains a residual requirement for around 3,000 – 4,000 sq.m gross of Class A1 – A5 floorspace within the town centre.

Table 6.4: Brentwood Town Centre Floorspace Requirements

Brentwood Town Centre	**sq.m gross**
Total A1-A5 Floorspace Requirements 2014 – 2030	14,388
William Hunter Way Potential A1-A5 Floorspace	8,000
Baytree Centre Potential A1-A5 Floorspace	1,000 – 2,000
Lidl, Wates Way Potential Floorspace	1,500
Total Residual A1-A5 Floorspace Requirements 2014 – 2030	**2,888 – 3,888**

6.14 In qualitative terms, an additional supermarket would be desirable for the town centre, given the current dominance of the Sainsbury's store, in order to offer more choice to residents.

6.15 Diversification of uses within parts of the town centre should be encouraged, in order to strengthen the overall offer and attraction of the centre. The retail core should be consolidated.

Shenfield

6.16 The floorspace capacity projection is for 941 sq.m gross of additional Class A1 to A5 floorspace in Shenfield up to 2030. There is some short term capacity to improve food store provision within the centre (230 sq.m gross by 2020). The household survey results show that the existing convenience stores in Shenfield attract a reasonable amount of top-up and some main food shopping trade.

6.17 Vacant shop units in Shenfield are only likely to accommodate a small element of this projection. In the short term, development options in or near the town centre are very limited. Medium to long term opportunities are also limited. There may be opportunities within Shenfield arising from Crossrail. The increased number of passengers travelling through and using the Crossrail station could lead to a demand for additional or improved retail and service facilities over and above the identified floorspace requirements.

6.18 The type of retail with a primary purpose to serve users of transport interchanges is generally different in both nature and scale from 'town centre retailing'. It predominantly provides a 'grab and go' food retail offer, whether from a convenience store (A1) or café/coffee shop/restaurant (A3). It is complemented by other comparison shops and service uses serving the railway customer. It tends to be dominated by national chains, providing a limited offer in a small shop format which differs from the same retailers' and operators' larger outlets in town centres and/or other retail locations.

6.19 There are limited short term opportunities for additional development in the vicinity of the station, but in the longer term, sites could become available to meet anticipated future needs.

Ingatestone

6.20 Ingatestone is a reasonably large village centre, anchored by a Co-op convenience store and a Budgens store. The centre provides a range of local shops and services to meet the needs of local residents in the surrounding area. The household survey results show that the Co-op and Budgens stores attract a reasonable amount of top-up and some main food shopping trade, suggesting that these stores provides an important local role. The existing stores appear to adequately meet the demand for local shopping. There is limited scope for further retail development within Ingatestone, however small scale extensions to the existing retail facilities could be appropriate.

Warley Hill

6.21 Warley Hill provides a reasonable range of units, serving local retail needs of surrounding residents, and those using Brentwood Station, primarily providing a convenience retail function. The results of the household survey suggest that these stores attract only a limited amount of top-up spending. This implies that the centre is not currently meeting the day to day needs of local residents, and it may be appropriate to seek to increase retail and service floorspace within Warley Hill. However, development options appear to be limited.

6.22 As with Shenfield, the increased number of passengers travelling through and using the Crossrail station at Warley Hill (Brentwood Station) could lead to a demand for additional or improved retail and service facilities over and above the identified floorspace requirements. There are limited short term opportunities for additional development in the vicinity of the station, but in the longer term, sites could become available to meet anticipated future needs.

6.23 There is a distinct break in retail and commercial frontages between Brentwood Town Centre and Warley Hill District Centre, and the two centres function separately. While we understand that the Council is considering incorporating Warley Hill within the Brentwood Town Centre boundary, in our view the two centres should continue to be defined as separate centres. The NPPF definition of a town centres is the *"area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area."* Given that the main town centre uses in Warley Hill do not adjoin the main town centre uses of Brentwood Town Centre, we consider this is the appropriate approach to take.

Other Local Centres

6.24 Other local centres in the Borough have an important role in providing day to day shops and services that are accessible to residents in villages and rural parts of the Borough. In our view, the Council's policy (LT11 of the Local Plan) seeking to retain local shops and services is appropriate, because it promotes more sustainable shopping/travel patterns.

6.25 If the potential strategic residential development at West Horndon is delivered then a new local centre of around 2,000 sq.m gross would be appropriate to support the new residents. This would need to ensure that it would complement rather than compete directly with the existing local centre.

Future Strategy Implementation and Monitoring

6.26 There are a number of broad areas of possible action the Council could pursue in order to maintain and enhance the role of shopping centres within the Borough, as follows:

- application of guidance within the NPPF, particularly relating to the sequential approach and impact tests for locally set thresholds in determining out-of-centre retail and other development proposals that generate significant numbers of trips;
- improving the range and choice of shops and services in all centres (where appropriate in terms of scale) by encouraging intensification, development and the re-occupation of vacant premises, and continuing to promote the centres;
- maintaining the generally high quality environment within each centre; and
- bring forward development opportunities through the Local Plan process to improve the availability of modern premises suitable for new occupiers.

6.27 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail development in the short – medium term up to 2020, with longer term forecast up to 2025 and 2030. Projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available, in particular longer-term projections up to 2030 should be treated with caution.

6.28 Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);

- existing retail floorspace and average turnover to floorspace densities; and
- implemented development within and around the study area.

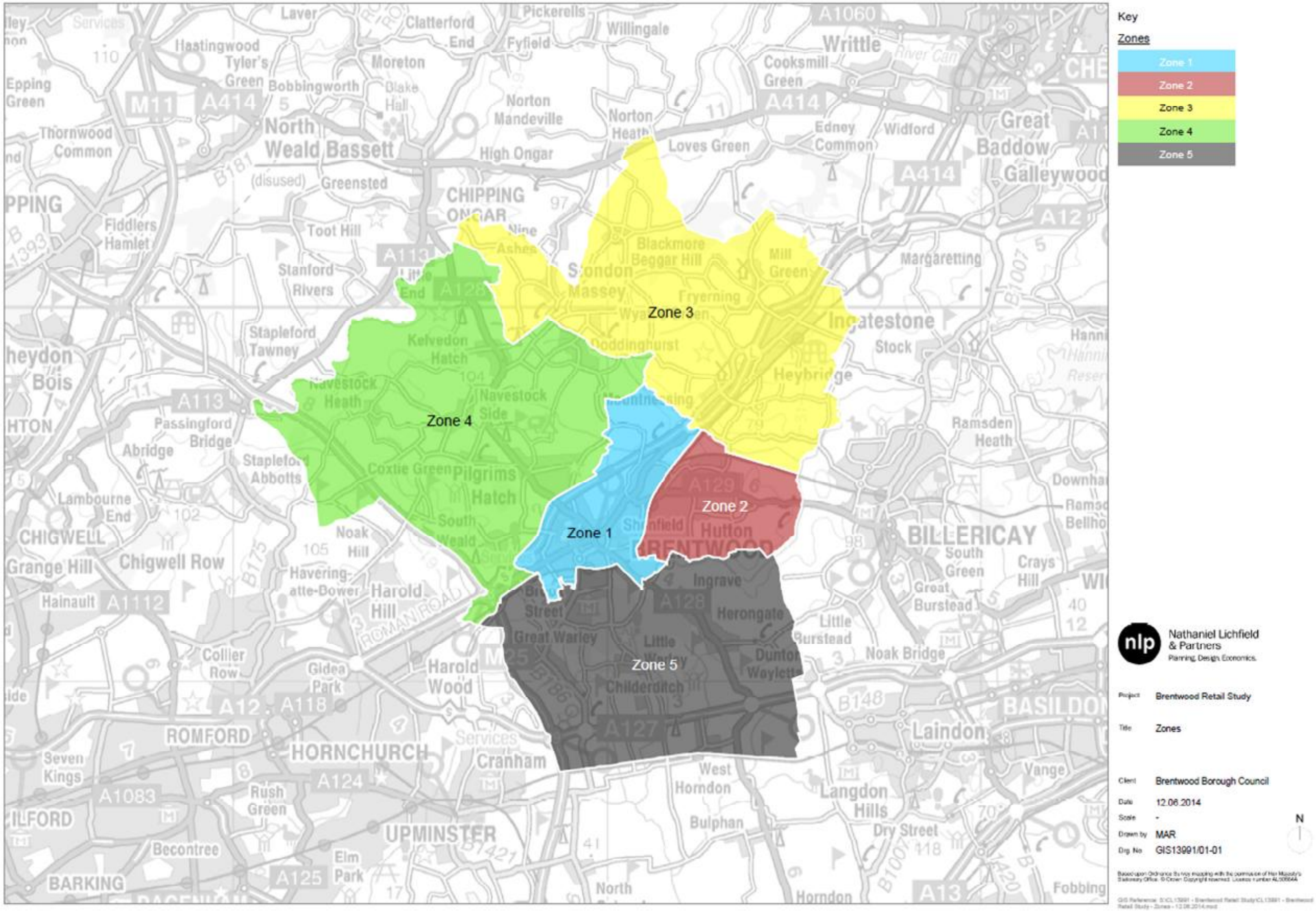
6.29 These key inputs into the retail capacity assessment can be amended to provide revised capacity projections.

Appendix 1 Study Area and Methodology

Brentwood Study Area Zones

Zone		Ward
1	Brentwood/Shenfield	Brentwood North Brentwood South Brentwood West Shenfield
2	Hutton	Hutton Central Hutton East Hutton North Hutton South
3	Ingatestone	Ingatestone Fryerning and Mountnessing Tipps Cross
4	Pilgrims Hatch	Brizes and Doddinghurst Pilgrims Hatch South Weald
5	Herongate/Ingrave	Herongate Ingrave and West Horndon Warley (Brentwood)

Plan 1: Study Area



Retail Capacity Assessment – Methodology and Data

Price Base

1 All monetary values expressed in this study are at 2012 prices, consistent with Experian's base year expenditure figures for 2012 (Retail Planner Briefing Note 11, October 2013) which is the most up to date information available.

Study Area

2 The quantitative analysis is based on the Borough study area, which covers the primary catchment areas of the main shopping destinations in Brentwood Borough. The extent of the study area comprises the Borough, given the influence of existing centres outside the Borough boundary. The study area is sub-divided into five zones based on ward boundaries as shown above.

Retail Expenditure

3 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2012 have been obtained.

4 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 11) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

5 Experian's EBS growth forecast rates for 2012 to 2015 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: -0.6% for 2012-2013, -0.3% for 2013 to 2014 and +0.1% for 2014 to 2015; for comparison goods: 3.2% for 2012-2013, 2.3% for 2013-2014 and 2.8% for 2014-2015).

6 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth average forecasts have been adopted i.e. 0.8% per annum for convenience goods after 2015 and 2.9% per annum growth for comparison goods. These growth rates are relatively cautious when compared with past growth rates, but in our view represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

7 Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store retail sales in 2012 is:

- 7% of convenience goods expenditure; and
- 14% of comparison goods expenditure.

8 Experian predicts that these figures will increase in the future. However, Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2012 are:

- 2.1% of convenience goods expenditure; and
- 10.5% of comparison goods expenditure.

9 The projections provided by Experian suggest that these percentages could increase to 4% and 15.1% by 2019 respectively, and estimated at 5.9% and 15.9% by 2024. These figures have been adopted in this assessment.

10 Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

11 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector, but Experian's projections suggest this growth will level off by 2020.

12 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales

may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

Market Shares/Penetration Rates

13 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the June 2014 household survey.

14 The total turnover of shops within the Borough is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Verdict (UK Food and Grocery Retailers) and Mintel Retail Rankings information, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Benchmark Turnover Levels

15 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

16 The estimated convenience goods sales areas have been derived from a combination of the Institute of Oxford Retail Consultants (ORC) StorePoint database, GOAD plans, Valuation Office data and NLP estimates based on site visits. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.

17 Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within the Borough and our experience of trading levels of small independent shops informed by household shopper surveys elsewhere, we have adopted an average sales density of £5,000 per sq.m net for convenience shops/stores in the study area. This is consistent with NLP's experience of retail studies across the South East and East regions. The total benchmark turnover of identified convenience sales floorspace within Brentwood Borough is £101.16 million (Table 10, Appendix 2).

18 Mintel's Retail Rankings provides company average sales density information for a selection of national comparison retailers. This data suggests a notional average sales density for national high street comparison retailers of around £5,000 per sq.m net. For retail warehouse operators the average sales density is generally lower at around £2,500 per sq.m net.

Appendix 2 Convenience Goods Capacity

Table 1: Study Area Population - Baseline Projections

Zone	2011	2014	2015	2020	2025	2030
Zone 1 - Brentwood/Shenfield	24,753	25,465	25,703	26,890	28,078	29,265
Zone 2 - Hutton	15,578	16,026	16,176	16,923	17,670	18,418
Zone 3 - Ingatestone	9,773	10,054	10,148	10,617	11,086	11,555
Zone 4 - Pilgrims Hatch	13,812	14,210	14,342	15,005	15,667	16,330
Zone 5 - Herongate/Ingrave	9,685	9,964	10,057	10,521	10,986	11,451
Total	**73,601**	**75,720**	**76,426**	**79,957**	**83,487**	**87,018**

Sources:
Experian 2011 (Census data)
Edge Analytics Greater Essex Demographic Forecasts
Population growth assumes 362 dwellings p.a. in Brentwood

Table 2: Convenience Goods Expenditure per person (£)

Zone	2014	2015	2020	2025	2030
Zone 1 - Brentwood/Shenfield	1,991	1,987	2,042	2,107	2,179
Zone 2 - Hutton	2,203	2,199	2,260	2,332	2,411
Zone 3 - Ingatestone	2,293	2,288	2,352	2,427	2,510
Zone 4 - Pilgrims Hatch	2,196	2,191	2,252	2,324	2,403
Zone 5 - Herongate/Ingrave	2,092	2,088	2,146	2,215	2,290

Sources:

Experian Local Expenditure 2012 (2012 prices)

Growth Rates: -0.6% 2012-2013, -0.3% 2013-2014, 0.1% 2014-2015 and 0.8% p.a. from 2015

Excludes Special Forms of Trading

Table 3: Total Convenience Goods Expenditure (£m) – Baseline Population

Zone	2014	2015	2020	2025	2030
Zone 1 - Brentwood/Shenfield	50.71	51.07	54.92	59.17	63.78
Zone 2 - Hutton	35.31	35.57	38.24	41.21	44.41
Zone 3 - Ingatestone	23.05	23.22	24.97	26.90	29.00
Zone 4 - Pilgrims Hatch	31.20	31.42	33.79	36.41	39.24
Zone 5 - Herongate/Ingrave	20.85	21.00	22.58	24.33	26.22
Total	**161.12**	**162.28**	**174.50**	**188.02**	**202.65**

Source: Tables 1 and 2

Table 4: Base Year 2014 Convenience Goods Market Shares (%)

Centre/Facility	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	% Inflow
Sainsbury's, William Hunter Way Brentwood	51.8%	36.8%	21.6%	45.3%	40.4%	10.0%
Co-op, Baytree Centre, Brentwood	1.8%	0.3%	0.3%	0.0%	1.8%	10.0%
M&S, High Street, Brentwood	9.6%	4.1%	2.5%	2.9%	1.8%	10.0%
Iceland, High Street, Brentwood	2.9%	1.8%	0.5%	3.0%	1.6%	10.0%
Tesco, Warley Hill Express	0.3%	0.3%	0.0%	0.0%	7.8%	5.0%
Tesco, Shenfield Express	1.8%	3.9%	0.9%	0.2%	1.2%	5.0%
Co-op, Shenfield	4.0%	4.7%	0.0%	0.3%	0.0%	5.0%
Local Shops - Brentwood/Warley Hill/Shenfield	5.3%	0.8%	1.4%	4.9%	7.0%	5.0%
Zone 1 Sub-Total	**77.5%**	**52.7%**	**27.2%**	**56.6%**	**61.6%**	
Co-op, Hutton	0.8%	11.8%	0.3%	0.1%	1.2%	5.0%
Co-op, Ingatestone	0.0%	0.0%	8.2%	0.0%	0.0%	5.0%
Budgens, Inagatestone	0.0%	0.0%	9.9%	0.0%	0.0%	5.0%
Budgens, Doddinghurst	0.0%	0.0%	8.0%	8.5%	0.0%	5.0%
Other Local Shops Brentwood Borough	1.7%	6.7%	2.0%	5.5%	3.3%	5.0%
Rest of Borough Sub-Total	**2.5%**	**18.5%**	**28.4%**	**14.1%**	**4.5%**	
Brentwood Borough Total	**80.0%**	**71.2%**	**55.6%**	**70.7%**	**66.1%**	
Food Stores in Basildon	3.3%	11.8%	1.4%	4.4%	18.2%	n/a
Food Stores in Billericay	2.1%	6.4%	7.1%	0.4%	0.9%	n/a
Food Stores in Romford/Harold Hill/Harold Wood	7.1%	6.2%	5.9%	13.0%	5.0%	n/a
Food Stores in Chelmsford	1.7%	2.4%	19.5%	5.5%	0.0%	n/a
Food Stores in Chipping Ongar	0.3%	0.0%	7.5%	3.3%	0.0%	n/a
Other	5.5%	2.0%	3.0%	2.7%	9.8%	n/a
Other Sub-Total	**20.0%**	**28.8%**	**44.4%**	**29.3%**	**33.9%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey June 2014

Table 5: Base Year 2014 Convenience Goods Expenditure (£m)

Centre/Facility	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Inflow	Total
Expenditure 2014	**50.71**	**35.31**	**23.05**	**31.20**	**20.85**		
Sainsbury's, William Hunter Way Brentwood	26.27	12.99	4.98	14.13	8.42	7.42	74.22
Co-op, Baytree Centre, Brentwood	0.91	0.11	0.07	0.00	0.38	0.16	1.63
M&S, High Street, Brentwood	4.87	1.45	0.58	0.90	0.38	0.91	9.08
Iceland, High Street, Brentwood	1.47	0.64	0.12	0.94	0.33	0.39	3.88
Tesco, Warley Hill Express	0.15	0.11	0.00	0.00	1.63	0.10	1.98
Tesco, Shenfield Express	0.91	1.38	0.21	0.06	0.25	0.15	2.96
Co-op, Shenfield	2.03	1.66	0.00	0.09	0.00	0.20	3.98
Local Shops - Brentwood/Warley Hill/Shenfield	2.69	0.28	0.32	1.53	1.46	0.33	6.61
Zone 1 Sub-Total	**39.30**	**18.61**	**6.27**	**17.66**	**12.84**	**9.66**	**104.34**
Co-op, Hutton	0.41	4.17	0.07	0.03	0.25	0.26	5.18
Co-op, Ingatestone	0.00	0.00	1.89	0.00	0.00	0.10	1.99
Budgens, Inagatestone	0.00	0.00	2.28	0.00	0.00	0.12	2.40
Budgens, Doddinghurst	0.00	0.00	1.84	2.65	0.00	0.24	4.73
Other Local Shops Brentwood Borough	0.86	2.37	0.46	1.72	0.69	0.32	6.41
Rest of Borough Sub-Total	**1.27**	**6.53**	**6.55**	**4.40**	**0.94**	**1.04**	**20.72**
Brentwood Borough Total	**40.57**	**25.14**	**12.82**	**22.06**	**13.78**	**10.69**	**125.06**
Food Stores in Basildon	1.67	4.17	0.32	1.37	3.79	n/a	11.33
Food Stores in Billericay	1.06	2.26	1.64	0.12	0.19	n/a	5.27
Food Stores in Romford/Harold Hill/Harold Wood	3.60	2.19	1.36	4.06	1.04	n/a	12.25
Food Stores in Chelmsford	0.86	0.85	4.50	1.72	0.00	n/a	7.92
Food Stores in Chipping Ongar	0.15	0.00	1.73	1.03	0.00	n/a	2.91
Other	2.79	0.71	0.69	0.84	2.04	n/a	7.07
Other Sub-Total	**10.14**	**10.17**	**10.24**	**9.14**	**7.07**		46.76
TOTAL	**50.71**	**35.31**	**23.05**	**31.20**	**20.85**		**171.81**

Source: Table 3 and 4

Table 6: Convenience Goods Expenditure 2015 (£m)

Centre/Facility	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Inflow	Total
Expenditure 2015	**51.07**	**35.57**	**23.22**	**31.42**	**21.00**		
Sainsbury's, William Hunter Way Brentwood	26.46	13.09	5.02	14.24	8.48	7.48	74.75
Co-op, Baytree Centre, Brentwood	0.92	0.11	0.07	0.00	0.38	0.16	1.64
M&S, High Street, Brentwood	4.90	1.46	0.58	0.91	0.38	0.91	9.15
Iceland, High Street, Brentwood	1.48	0.64	0.12	0.94	0.34	0.39	3.91
Tesco, Warley Hill Express	0.15	0.11	0.00	0.00	1.64	0.10	2.00
Tesco, Shenfield Express	0.92	1.39	0.21	0.06	0.25	0.15	2.98
Co-op, Shenfield	2.04	1.67	0.00	0.09	0.00	0.20	4.01
Local Shops - Brentwood/Warley Hill/Shenfield	2.71	0.28	0.33	1.54	1.47	0.33	6.66
Zone 1 Sub-Total	**39.58**	**18.74**	**6.32**	**17.79**	**12.94**	**9.73**	**105.09**
Co-op, Hutton	0.41	4.20	0.07	0.03	0.25	0.26	5.22
Co-op, Ingatestone	0.00	0.00	1.90	0.00	0.00	0.10	2.00
Budgens, Inagatestone	0.00	0.00	2.30	0.00	0.00	0.12	2.42
Budgens, Doddinghurst	0.00	0.00	1.86	2.67	0.00	0.24	4.77
Other Local Shops Brentwood Borough	0.87	2.38	0.46	1.73	0.69	0.32	6.46
Rest of Borough Sub-Total	**1.28**	**6.58**	**6.59**	**4.43**	**0.94**	**1.04**	**20.87**
Brentwood Borough Total	**40.86**	**25.32**	**12.91**	**22.22**	**13.88**	**10.77**	**125.96**
Food Stores in Basildon	1.69	4.20	0.33	1.38	3.82	n/a	11.41
Food Stores in Billericay	1.07	2.28	1.65	0.13	0.19	n/a	5.31
Food Stores in Romford/Harold Hill/Harold Wood	3.63	2.21	1.37	4.09	1.05	n/a	12.34
Food Stores in Chelmsford	0.87	0.85	4.53	1.73	0.00	n/a	7.98
Food Stores in Chipping Ongar	0.15	0.00	1.74	1.04	0.00	n/a	2.93
Other	2.81	0.71	0.70	0.85	2.06	n/a	7.12
Other Sub-Total	**10.21**	**10.24**	**10.31**	**9.21**	**7.12**		47.09
TOTAL	**51.07**	**35.57**	**23.22**	**31.42**	**21.00**		**173.05**

Source: Table 3 and 4

Table 7: Convenience Goods Expenditure 2020 (£m)

Centre/Facility	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Inflow	Total
Expenditure 2020	**54.92**	**38.24**	**24.97**	**33.79**	**22.58**		
Sainsbury's, William Hunter Way Brentwood	28.45	14.07	5.39	15.31	9.12	8.04	80.38
Co-op, Baytree Centre, Brentwood	0.99	0.11	0.07	0.00	0.41	0.18	1.76
M&S, High Street, Brentwood	5.27	1.57	0.62	0.98	0.41	0.98	9.83
Iceland, High Street, Brentwood	1.59	0.69	0.12	1.01	0.36	0.42	4.20
Tesco, Warley Hill Express	0.16	0.11	0.00	0.00	1.76	0.11	2.15
Tesco, Shenfield Express	0.99	1.49	0.22	0.07	0.27	0.16	3.20
Co-op, Shenfield	2.20	1.80	0.00	0.10	0.00	0.22	4.31
Local Shops - Brentwood/Warley Hill/Shenfield	2.91	0.31	0.35	1.66	1.58	0.36	7.16
Zone 1 Sub-Total	**42.56**	**20.15**	**6.79**	**19.12**	**13.91**	**10.46**	**113.00**
Co-op, Hutton	0.44	4.51	0.07	0.03	0.27	0.28	5.61
Co-op, Ingatestone	0.00	0.00	2.05	0.00	0.00	0.11	2.16
Budgens, Inagatestone	0.00	0.00	2.47	0.00	0.00	0.13	2.60
Budgens, Doddinghurst	0.00	0.00	2.00	2.87	0.00	0.26	5.13
Other Local Shops Brentwood Borough	0.93	2.56	0.50	1.86	0.75	0.35	6.95
Rest of Borough Sub-Total	**1.37**	**7.07**	**7.09**	**4.76**	**1.02**	**1.12**	**22.44**
Brentwood Borough Total	**43.93**	**27.23**	**13.88**	**23.89**	**14.93**	**11.58**	**135.44**
Food Stores in Basildon	1.81	4.51	0.35	1.49	4.11	n/a	12.27
Food Stores in Billericay	1.15	2.45	1.77	0.14	0.20	n/a	5.71
Food Stores in Romford/Harold Hill/Harold Wood	3.90	2.37	1.47	4.39	1.13	n/a	13.26
Food Stores in Chelmsford	0.93	0.92	4.87	1.86	0.00	n/a	8.58
Food Stores in Chipping Ongar	0.16	0.00	1.87	1.12	0.00	n/a	3.15
Other	3.02	0.76	0.75	0.91	2.21	n/a	7.66
Other Sub-Total	**10.98**	**11.01**	**11.09**	**9.90**	**7.65**		50.64
TOTAL	**54.92**	**38.24**	**24.97**	**33.79**	**22.58**		**186.08**

Source: Table 3 and 4

Table 8: Convenience Goods Expenditure 2025 (£m)

Centre/Facility	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Inflow	Total
Expenditure 2025	**59.17**	**41.21**	**26.90**	**36.41**	**24.33**		
Sainsbury's, William Hunter Way Brentwood	30.65	15.16	5.81	16.49	9.83	8.66	86.61
Co-op, Baytree Centre, Brentwood	1.07	0.12	0.08	0.00	0.44	0.19	1.90
M&S, High Street, Brentwood	5.68	1.69	0.67	1.06	0.44	1.06	10.60
Iceland, High Street, Brentwood	1.72	0.74	0.13	1.09	0.39	0.45	4.53
Tesco, Warley Hill Express	0.18	0.12	0.00	0.00	1.90	0.12	2.31
Tesco, Shenfield Express	1.07	1.61	0.24	0.07	0.29	0.17	3.45
Co-op, Shenfield	2.37	1.94	0.00	0.11	0.00	0.23	4.65
Local Shops - Brentwood/Warley Hill/Shenfield	3.14	0.33	0.38	1.78	1.70	0.39	7.72
Zone 1 Sub-Total	**45.86**	**21.72**	**7.32**	**20.61**	**14.99**	**11.27**	**121.76**
Co-op, Hutton	0.47	4.86	0.08	0.04	0.29	0.30	6.05
Co-op, Ingatestone	0.00	0.00	2.21	0.00	0.00	0.12	2.32
Budgens, Inagatestone	0.00	0.00	2.66	0.00	0.00	0.14	2.80
Budgens, Doddinghurst	0.00	0.00	2.15	3.09	0.00	0.28	5.52
Other Local Shops Brentwood Borough	1.01	2.76	0.54	2.00	0.80	0.37	7.48
Rest of Borough Sub-Total	**1.48**	**7.62**	**7.64**	**5.13**	**1.09**	**1.21**	**24.18**
Brentwood Borough Total	**47.34**	**29.34**	**14.96**	**25.74**	**16.08**	**12.48**	**145.94**
Food Stores in Basildon	1.95	4.86	0.38	1.60	4.43	n/a	13.22
Food Stores in Billericay	1.24	2.64	1.91	0.15	0.22	n/a	6.15
Food Stores in Romford/Harold Hill/Harold Wood	4.20	2.55	1.59	4.73	1.22	n/a	14.29
Food Stores in Chelmsford	1.01	0.99	5.25	2.00	0.00	n/a	9.24
Food Stores in Chipping Ongar	0.18	0.00	2.02	1.20	0.00	n/a	3.40
Other	3.25	0.82	0.81	0.98	2.38	n/a	8.25
Other Sub-Total	**11.83**	**11.87**	**11.95**	**10.67**	**8.25**		54.56
TOTAL	**59.17**	**41.21**	**26.90**	**36.41**	**24.33**		**200.50**

Source: Table 3 and 4

Table 9: Convenience Goods Expenditure 2030 (£m)

Centre/Facility	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Inflow	Total
Expenditure 2030	**63.78**	**44.41**	**29.00**	**39.24**	**26.22**		
Sainsbury's, William Hunter Way Brentwood	33.04	16.34	6.26	17.78	10.59	9.34	93.35
Co-op, Baytree Centre, Brentwood	1.15	0.13	0.09	0.00	0.47	0.20	2.04
M&S, High Street, Brentwood	6.12	1.82	0.72	1.14	0.47	1.14	11.42
Iceland, High Street, Brentwood	1.85	0.80	0.14	1.18	0.42	0.49	4.88
Tesco, Warley Hill Express	0.19	0.13	0.00	0.00	2.05	0.12	2.49
Tesco, Shenfield Express	1.15	1.73	0.26	0.08	0.31	0.19	3.72
Co-op, Shenfield	2.55	2.09	0.00	0.12	0.00	0.25	5.01
Local Shops - Brentwood/Warley Hill/Shenfield	3.38	0.36	0.41	1.92	1.84	0.42	8.32
Zone 1 Sub-Total	**49.43**	**23.41**	**7.89**	**22.21**	**16.15**	**12.15**	**131.23**
Co-op, Hutton	0.51	5.24	0.09	0.04	0.31	0.33	6.52
Co-op, Ingatestone	0.00	0.00	2.38	0.00	0.00	0.13	2.50
Budgens, Inagatestone	0.00	0.00	2.87	0.00	0.00	0.15	3.02
Budgens, Doddinghurst	0.00	0.00	2.32	3.34	0.00	0.30	5.95
Other Local Shops Brentwood Borough	1.08	2.98	0.58	2.16	0.87	0.40	8.07
Rest of Borough Sub-Total	**1.59**	**8.22**	**8.24**	**5.53**	**1.18**	**1.30**	**26.06**
Brentwood Borough Total	**51.02**	**31.62**	**16.12**	**27.74**	**17.33**	**13.45**	**157.29**
Food Stores in Basildon	2.10	5.24	0.41	1.73	4.77	n/a	14.25
Food Stores in Billericay	1.34	2.84	2.06	0.16	0.24	n/a	6.63
Food Stores in Romford/Harold Hill/Harold Wood	4.53	2.75	1.71	5.10	1.31	n/a	15.41
Food Stores in Chelmsford	1.08	1.07	5.65	2.16	0.00	n/a	9.96
Food Stores in Chipping Ongar	0.19	0.00	2.17	1.29	0.00	n/a	3.66
Other	3.51	0.89	0.87	1.06	2.57	n/a	8.90
Other Sub-Total	**12.76**	**12.79**	**12.87**	**11.50**	**8.89**		58.81
TOTAL	**63.78**	**44.41**	**29.00**	**39.24**	**26.22**		**216.10**

Source: Table 3 and 4

Table 10: Convenience Goods Floorspace and Benchmark Turnover 2014

Centre	Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Brentwood/Zone 1	Sainsbury's, William Hunter Way Brentwood	6,102	70%	4,271	£13,619	£58.17
	Co-op, Baytree Centre, Brentwood	446	90%	401	£7,661	£3.08
	M&S, High Street, Brentwood	793	95%	753	£11,253	£8.48
	Iceland, High Street, Brentwood	459	95%	436	£7,295	£3.18
	Other Convenience Shops - Brentwood Town Centre	784	100%	784	£5,000	£3.92
	Tesco, Warley Hill Express	156	95%	148	£11,080	£1.64
	Other Convenience Shops - Warley Hill	420	100%	420	£5,000	£2.10
	Tesco, Shenfield Express	173	95%	164	£11,080	£1.82
	Co-op, Shenfield	248	95%	236	£7,661	£1.80
	Other Convenience Shops - Shenfield	360	100%	360	£5,000	£1.80
	Sub-Total	**9,941**		**7,974**		**£85.99**
Other	Co-op, Ingatestone	326	95%	310	£7,661	£2.37
	Budgens, Inagatestone	279	95%	265	£5,000	£1.33
	Other Convenience Shops - Ingatestone	290	100%	290	£5,000	£1.45
	Co-op, Hutton	119	95%	113	£7,661	£0.87
	Tesco Express, Hanging Hill Lane, Hutton	157	95%	149	£11,080	£1.65
	Budgens, Doddinghurst	293	95%	278	£5,000	£1.39
	Co-op, Pilgrims Hatch	173	95%	164	£7,661	£1.26
	Other Local Convenience Shops	970	100%	970	£5,000	£4.85
	Sub-Total	**2,607**		**2,540**		**£15.17**
Brentwood Total		**12,548**		**10,514**		**£101.16**

Source: NLP Survey June 2014, ORC StorePoint, Goad, VOA and Verdict

Table 11: Summary of Convenience Goods Expenditure 2014 to 2030 - Baseline Population

Centre	2014	2015	2020	2025	2030
Available Expenditure in Brentwood Borough (£m)					
Brentwood	95.41	96.10	103.34	111.35	120.01
Warley Hill	1.98	2.00	2.15	2.31	2.49
Shenfield	6.94	6.99	7.51	8.10	8.73
Ingatestone	4.39	4.42	4.76	5.13	5.52
Other Local Shops Brentwood Borough	16.33	16.45	17.68	19.06	20.54
Total	**125.06**	**125.96**	**135.44**	**145.94**	**157.29**
Turnover of Existing Facilities (£m)					
Brentwood	76.83	76.83	76.83	76.83	76.83
Warley Hill	3.74	3.74	3.74	3.74	3.74
Shenfield	5.43	5.43	5.43	5.43	5.43
Ingatestone	5.15	5.15	5.15	5.15	5.15
Other Local Shops Brentwood Borough	16.33	16.33	16.33	16.33	16.33
Total	**107.47**	**107.47**	**107.47**	**107.47**	**107.47**
Surplus/Defecit Expenditure (£m)					
Brentwood	18.59	19.28	26.51	34.52	43.18
Warley Hill	-1.76	-1.74	-1.59	-1.43	-1.25
Shenfield	1.51	1.56	2.09	2.67	3.30
Ingatestone	-0.76	-0.72	-0.39	-0.02	0.38
Other Local Shops Brentwood Borough	0.00	0.12	1.36	2.73	4.21
Total	**17.59**	**18.49**	**27.97**	**38.47**	**49.82**

Table 12: Convenience Goods Floorspace Capacity 2014 to 2030 - Baseline Population

Centre	2014	2015	2020	2025	2030
Turnover Density New Floorspace (£ per sq.m)	£13,000	£13,000	£13,000	£13,000	£13,000
Floorspace Requirement (sq.m net)					
Brentwood	1,430	1,483	2,039	2,655	3,322
Warley Hill	-135	-134	-123	-110	-96
Shenfield	116	120	161	205	254
Ingatestone	-58	-56	-30	-2	29
Other Local Shops Brentwood Borough	0	9	104	210	324
Total	**1,353**	**1,422**	**2,151**	**2,959**	**3,833**
Floorspace Requirement (sq.m gross)					
Brentwood	2,043	2,118	2,913	3,793	4,746
Warley Hill	-193	-192	-175	-157	-137
Shenfield	166	172	230	294	363
Ingatestone	-83	-80	-43	-2	41
Other Local Shops Brentwood Borough	0	13	149	300	463
Total	**1,933**	**2,032**	**3,074**	**4,227**	**5,475**

Table A: Study Area Population - High Population Projections

Zone	2011	2014	2015	2020	2025	2030
Zone 1 - Brentwood/Shenfield	24,753	25,566	25,837	27,192	28,546	29,901
Zone 2 - Hutton	15,578	16,090	16,260	17,113	17,965	18,818
Zone 3 - Ingatestone	9,773	10,094	10,201	10,736	11,271	11,806
Zone 4 - Pilgrims Hatch	13,812	14,266	14,417	15,173	15,929	16,685
Zone 5 - Herongate/Ingrave	9,685	10,003	10,109	10,639	11,169	11,699
Total	**73,601**	**76,018**	**76,824**	**80,852**	**84,880**	**88,909**

Source:
Experian 2011 (Census data)
Population growth assumes 413 dwellings p.a. in Brentwood

Table B: Summary of Convenience Goods Expenditure 2014 to 2030 - High Population Projections

Centre	2014	2015	2020	2025	2030
Available Expenditure in Brentwood Borough (£m)					
Brentwood	95.79	96.60	104.49	113.20	122.62
Warley Hill	1.99	2.01	2.17	2.35	2.55
Shenfield	6.97	7.02	7.60	8.23	8.92
Ingatestone	4.41	4.45	4.81	5.21	5.64
Other Local Shops Brentwood Borough	16.39	16.53	17.88	19.37	20.98
Total	**125.55**	**126.62**	**136.96**	**148.37**	**160.71**
Turnover of Existing Facilities (£m)					
Brentwood	76.83	76.83	76.83	76.83	76.83
Warley Hill	3.74	3.74	3.74	3.74	3.74
Shenfield	5.43	5.43	5.43	5.43	5.43
Ingatestone	5.15	5.15	5.15	5.15	5.15
Other Local Shops Brentwood Borough	16.39	16.39	16.39	16.39	16.39
Total	**107.53**	**107.53**	**107.53**	**107.53**	**107.53**
Surplus/Defecit Expenditure (£m)					
Brentwood	18.96	19.78	27.67	36.38	45.79
Warley Hill	-1.75	-1.73	-1.57	-1.39	-1.19
Shenfield	1.54	1.60	2.17	2.81	3.49
Ingatestone	-0.74	-0.70	-0.34	0.06	0.50
Other Local Shops Brentwood Borough	0.00	0.14	1.49	2.98	4.59
Total	**18.02**	**19.08**	**29.42**	**40.84**	**53.18**

Table C: Convenience Goods Floorspace Capacity 2014 to 2030 - High Population Projections

Centre	2014	2015	2020	2025	2030
Turnover Density New Floorspace (£ per sq.m)	£13,000	£13,000	£13,000	£13,000	£13,000
Floorspace Requirement (sq.m net)					
Brentwood	1,459	1,521	2,128	2,798	3,522
Warley Hill	-135	-133	-121	-107	-92
Shenfield	118	123	167	216	269
Ingatestone	-57	-54	-26	5	38
Other Local Shops Brentwood Borough	0	11	115	229	353
Total	**1,386**	**1,468**	**2,263**	**3,141**	**4,090**
Floorspace Requirement (sq.m gross)					
Brentwood	2,084	2,173	3,040	3,998	5,032
Warley Hill	-192	-191	-173	-153	-131
Shenfield	169	176	239	308	384
Ingatestone	-81	-77	-37	7	55
Other Local Shops Brentwood Borough	0	15	164	327	504
Total	**1,980**	**2,097**	**3,233**	**4,488**	**5,844**

Appendix 3 Comparison Goods Capacity

Table 1: Study Area Population - Baseline Projections

Zone	2011	2014	2015	2020	2025	2030
Zone 1 - Brentwood/Shenfield	24,753	25,465	25,703	26,890	28,078	29,265
Zone 2 - Hutton	15,578	16,026	16,176	16,923	17,670	18,418
Zone 3 - Ingatestone	9,773	10,054	10,148	10,617	11,086	11,555
Zone 4 - Pilgrims Hatch	13,812	14,210	14,342	15,005	15,667	16,330
Zone 5 - Herongate/Ingrave	9,685	9,964	10,057	10,521	10,986	11,451
Total	**73,601**	**75,720**	**76,426**	**79,957**	**83,487**	**87,018**

Sources:
Experian 2011 (Census data)
Edge Analytics Greater Essex Demographic Forecasts
Population growth assumes 362 dwellings p.a. in Brentwood

Table 2: Comparison Goods Expenditure per person (£)

Zone	2014	2015	2020	2025	2030
Zone 1 - Brentwood/Shenfield	3,326	3,392	3,771	4,329	4,989
Zone 2 - Hutton	3,615	3,686	4,098	4,705	5,421
Zone 3 - Ingatestone	3,780	3,855	4,285	4,920	5,669
Zone 4 - Pilgrims Hatch	3,506	3,576	3,975	4,564	5,259
Zone 5 - Herongate/Ingrave	3,491	3,561	3,958	4,544	5,237

Sources:
Experian Local Expenditure 2012 (2012 prices)
Growth Rates: 3.2% 2012-2013, 2.3% 2013-2014, 2.8% 2014-2015 and 2.9% p.a. from 2015
Excludes Special Forms of Trading

Table 3: Total Comparison Goods Expenditure (£m) – Baseline Population

Zone	2014	2015	2020	2025	2030
Zone 1 - Brentwood/Shenfield	84.70	87.19	101.40	121.56	146.00
Zone 2 - Hutton	57.93	59.63	69.34	83.14	99.85
Zone 3 - Ingatestone	38.00	39.12	45.49	54.54	65.50
Zone 4 - Pilgrims Hatch	49.82	51.29	59.64	71.50	85.88
Zone 5 - Herongate/Ingrave	34.79	35.81	41.64	49.93	59.96
Total	**265.24**	**273.03**	**317.52**	**380.67**	**457.19**

Source: Tables 1 and 2

Table 4: Base Year 2014 Comparison Goods Market Shares (%)

Centre/Facility	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	% Inflow
Brentwood Town Centre	36.0%	28.5%	19.4%	27.9%	32.1%	10.0%
Wickes, Brook Street, Brentwood	0.5%	0.2%	0.2%	0.7%	0.2%	5.0%
Warley Hill, Brentwood Station	0.0%	0.1%	1.2%	0.1%	0.2%	5.0%
Shenfield District Centre	1.0%	1.2%	0.4%	0.1%	0.1%	5.0%
Ingatestone District Centre	0.1%	0.2%	3.1%	0.1%	0.0%	5.0%
Other Brentwood Borough	0.2%	1.0%	0.7%	0.4%	0.2%	5.0%
Brentwood Borough Total	**37.8%**	**31.2%**	**25.0%**	**29.3%**	**32.8%**	
Basildon	3.3%	12.7%	3.1%	3.8%	11.4%	n/a
Billericay	0.2%	2.2%	1.1%	0.0%	0.7%	n/a
Romford/Harold Hill	13.6%	10.7%	10.2%	18.8%	11.5%	n/a
Chelmsford	4.8%	7.8%	29.4%	7.8%	2.4%	n/a
intu Lakeside	26.0%	22.0%	16.2%	28.7%	27.0%	n/a
Other	14.3%	13.4%	15.0%	11.6%	14.2%	n/a
Other Sub-Total	**62.2%**	**68.8%**	**75.0%**	**70.7%**	**67.2%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey June 2014

Table 5: Base Year 2014 Comparison Goods Expenditure (£m)

Centre/Facility	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Inflow	Total
Expenditure 2014	**84.70**	**57.93**	**38.00**	**49.82**	**34.79**		
Brentwood Town Centre	30.49	16.51	7.37	13.90	11.17	8.83	88.27
Wickes, Brook Street, Brentwood	0.42	0.12	0.08	0.35	0.07	0.05	1.09
Warley Hill, Brentwood Station	0.00	0.06	0.46	0.05	0.07	0.03	0.67
Shenfield District Centre	0.85	0.70	0.15	0.05	0.03	0.09	1.87
Ingatestone District Centre	0.08	0.12	1.18	0.05	0.00	0.08	1.50
Other Brentwood Borough	0.17	0.58	0.27	0.20	0.07	0.07	1.35
Brentwood Borough Total	**32.02**	**18.07**	**9.50**	**14.60**	**11.41**	**9.15**	**94.75**
Basildon	2.80	7.36	1.18	1.89	3.97	n/a	17.19
Billericay	0.17	1.27	0.42	0.00	0.24	n/a	2.11
Romford/Harold Hill	11.52	6.20	3.88	9.37	4.00	n/a	34.96
Chelmsford	4.07	4.52	11.17	3.89	0.83	n/a	24.48
intu Lakeside	22.02	12.74	6.16	14.30	9.39	n/a	64.62
Other	12.11	7.76	5.70	5.78	4.94	n/a	36.29
Other Sub-Total	**52.69**	**39.85**	**28.50**	**35.22**	**23.38**		**179.64**
TOTAL	**84.70**	**57.93**	**38.00**	**49.82**	**34.79**		**274.39**

Source: Table 3 and 4

Table 6: Comparison Goods Expenditure 2015 (£m)

Centre/Facility	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Inflow	Total
Expenditure 2015	**87.19**	**59.63**	**39.12**	**51.29**	**35.81**		
Brentwood Town Centre	31.39	16.99	7.59	14.31	11.49	9.09	90.86
Wickes, Brook Street, Brentwood	0.44	0.12	0.08	0.36	0.07	0.06	1.12
Warley Hill, Brentwood Station	0.00	0.06	0.47	0.05	0.07	0.03	0.69
Shenfield District Centre	0.87	0.72	0.16	0.05	0.04	0.10	1.93
Ingatestone District Centre	0.09	0.12	1.21	0.05	0.00	0.08	1.55
Other Brentwood Borough	0.17	0.60	0.27	0.21	0.07	0.07	1.39
Brentwood Borough Total	**32.96**	**18.60**	**9.78**	**15.03**	**11.75**	**9.42**	**97.53**
Basildon	2.88	7.57	1.21	1.95	4.08	n/a	17.69
Billericay	0.17	1.31	0.43	0.00	0.25	n/a	2.17
Romford/Harold Hill	11.86	6.38	3.99	9.64	4.12	n/a	35.99
Chelmsford	4.19	4.65	11.50	4.00	0.86	n/a	25.20
intu Lakeside	22.67	13.12	6.34	14.72	9.67	n/a	66.51
Other	12.47	7.99	5.87	5.95	5.08	n/a	37.36
Other Sub-Total	**54.23**	**41.03**	**29.34**	**36.26**	**24.06**		**184.92**
TOTAL	**87.19**	**59.63**	**39.12**	**51.29**	**35.81**		**282.45**

Source: Table 3 and 4

Table 7: Comparison Goods Expenditure 2020 (£m)

Centre/Facility	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Inflow	Total
Expenditure 2020	**101.40**	**69.34**	**45.49**	**59.64**	**41.64**		
Brentwood Town Centre	36.50	19.76	8.83	16.64	13.37	10.57	105.66
Wickes, Brook Street, Brentwood	0.51	0.14	0.09	0.42	0.08	0.07	1.30
Warley Hill, Brentwood Station	0.00	0.07	0.55	0.06	0.08	0.04	0.80
Shenfield District Centre	1.01	0.83	0.18	0.06	0.04	0.11	2.24
Ingatestone District Centre	0.10	0.14	1.41	0.06	0.00	0.09	1.80
Other Brentwood Borough	0.20	0.69	0.32	0.24	0.08	0.08	1.62
Brentwood Borough Total	**38.33**	**21.64**	**11.37**	**17.48**	**13.66**	**10.95**	**113.42**
Basildon	3.35	8.81	1.41	2.27	4.75	n/a	20.58
Billericay	0.20	1.53	0.50	0.00	0.29	n/a	2.52
Romford/Harold Hill	13.79	7.42	4.64	11.21	4.79	n/a	41.85
Chelmsford	4.87	5.41	13.37	4.65	1.00	n/a	29.30
intu Lakeside	26.36	15.26	7.37	17.12	11.24	n/a	77.35
Other	14.50	9.29	6.82	6.92	5.91	n/a	43.45
Other Sub-Total	**63.07**	**47.71**	**34.12**	**42.17**	**27.98**		**215.05**
TOTAL	**101.40**	**69.34**	**45.49**	**59.64**	**41.64**		**328.47**

Source: Table 3 and 4

Table 8: Comparison Goods Expenditure 2025 (£m)

Centre/Facility	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Inflow	Total
Expenditure 2025	**121.56**	**83.14**	**54.54**	**71.50**	**49.93**		
Brentwood Town Centre	43.76	23.69	10.58	19.95	16.03	12.67	126.68
Wickes, Brook Street, Brentwood	0.61	0.17	0.11	0.50	0.10	0.08	1.56
Warley Hill, Brentwood Station	0.00	0.08	0.65	0.07	0.10	0.05	0.96
Shenfield District Centre	1.22	1.00	0.22	0.07	0.05	0.13	2.69
Ingatestone District Centre	0.12	0.17	1.69	0.07	0.00	0.11	2.16
Other Brentwood Borough	0.24	0.83	0.38	0.29	0.10	0.10	1.94
Brentwood Borough Total	**45.95**	**25.94**	**13.64**	**20.95**	**16.38**	**13.13**	**135.98**
Basildon	4.01	10.56	1.69	2.72	5.69	n/a	24.67
Billericay	0.24	1.83	0.60	0.00	0.35	n/a	3.02
Romford/Harold Hill	16.53	8.90	5.56	13.44	5.74	n/a	50.18
Chelmsford	5.84	6.48	16.03	5.58	1.20	n/a	35.13
intu Lakeside	31.61	18.29	8.84	20.52	13.48	n/a	92.73
Other	17.38	11.14	8.18	8.29	7.09	n/a	52.09
Other Sub-Total	**75.61**	**57.20**	**40.91**	**50.55**	**33.55**		**257.82**
TOTAL	**121.56**	**83.14**	**54.54**	**71.50**	**49.93**		**393.80**

Source: Table 3 and 4

Table 9: Comparison Goods Expenditure 2030 (£m)

Centre/Facility	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Inflow	Total
Expenditure 2030	**146.00**	**99.85**	**65.50**	**85.88**	**59.96**		
Brentwood Town Centre	52.56	28.46	12.71	23.96	19.25	15.21	152.15
Wickes, Brook Street, Brentwood	0.73	0.20	0.13	0.60	0.12	0.09	1.88
Warley Hill, Brentwood Station	0.00	0.10	0.79	0.09	0.12	0.06	1.15
Shenfield District Centre	1.46	1.20	0.26	0.09	0.06	0.16	3.23
Ingatestone District Centre	0.15	0.20	2.03	0.09	0.00	0.13	2.59
Other Brentwood Borough	0.29	1.00	0.46	0.34	0.12	0.12	2.33
Brentwood Borough Total	**55.19**	**31.15**	**16.38**	**25.16**	**19.67**	**15.77**	**163.32**
Basildon	4.82	12.68	2.03	3.26	6.84	n/a	29.63
Billericay	0.29	2.20	0.72	0.00	0.42	n/a	3.63
Romford/Harold Hill	19.86	10.68	6.68	16.15	6.90	n/a	60.26
Chelmsford	7.01	7.79	19.26	6.70	1.44	n/a	42.19
intu Lakeside	37.96	21.97	10.61	24.65	16.19	n/a	111.37
Other	20.88	13.38	9.83	9.96	8.51	n/a	62.56
Other Sub-Total	**90.81**	**68.70**	**49.13**	**60.72**	**40.29**		**309.65**
TOTAL	**146.00**	**99.85**	**65.50**	**85.88**	**59.96**		**472.97**

Source: Table 3 and 4

Table 10: Comparison Goods Floorspace, 2014

Centre	Gross Floorspace (sq.m)	Sales Floorspace (sq.m net)
Brentwood Town Centre	20,437	14,306
Food Store Comparison Floorspace, Brentwood	n/a	1,939
Wickes, Brook Street, Brentwood	2,368	2,131
Warley Hill, Brentwood Station	1,020	612
Shenfield District Centre	1,050	630
Ingatestone District Centre	1,855	1,113
Brentwood Total		**20,731**

Source: NLP Survey June 2014, ORC StorePoint, Goad, VOA and Verdict

Table 11: Summary of Comparison Goods Expenditure 2014 to 2030 - Baseline Population

Centre	2014	2015	2020	2025	2030
Available Expenditure in Brentwood Borough (£m)					
Brentwood (incl. Wickes)	89.36	91.98	106.97	128.24	154.02
Warley Hill, Brentwood Station	0.67	0.69	0.80	0.96	1.15
Shenfield District Centre	1.87	1.93	2.24	2.69	3.23
Ingatestone District Centre	1.50	1.55	1.80	2.16	2.59
Other Brentwood Borough	1.35	1.39	1.62	1.94	2.33
Total	**94.75**	**97.53**	**113.42**	**135.98**	**163.32**
Turnover of Existing Facilities (£m)					
Brentwood (incl. Wickes)	89.36	91.14	100.63	111.10	122.67
Warley Hill, Brentwood Station	0.67	0.68	0.75	0.83	0.92
Shenfield District Centre	1.87	1.91	2.11	2.33	2.57
Ingatestone District Centre	1.50	1.53	1.69	1.87	2.06
Other Brentwood Borough	1.35	1.38	1.52	1.68	1.85
Total	**94.75**	**96.65**	**106.71**	**117.81**	**130.07**
Surplus Expenditure (£m)					
Brentwood	n/a	0.84	6.34	17.14	31.35
Warley Hill, Brentwood Station	n/a	0.01	0.05	0.13	0.23
Shenfield District Centre	n/a	0.02	0.13	0.36	0.66
Ingatestone District Centre	n/a	0.01	0.11	0.29	0.53
Other Brentwood Borough	n/a	0.01	0.10	0.26	0.47
Total	**n/a**	**0.89**	**6.72**	**18.17**	**33.25**

Table 12: Comparison Goods Floorspace Capacity 2014 to 2030 - Baseline Population

Centre	2014	2015	2020	2025	2030
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,100	£5,631	£6,217	£6,864
Floorspace Requirement (sq.m net)					
Brentwood	n/a	164	1,125	2,757	4,568
Warley Hill, Brentwood Station	n/a	1	8	21	34
Shenfield District Centre	n/a	3	24	58	96
Ingatestone District Centre	n/a	3	19	46	77
Other Brentwood Borough	n/a	2	17	42	69
Total	**n/a**	**174**	**1,193**	**2,923**	**4,844**
Floorspace Requirement (sq.m gross)					
Brentwood	n/a	219	1,500	3,676	6,091
Warley Hill, Brentwood Station	n/a	2	11	27	45
Shenfield District Centre	n/a	5	31	77	128
Ingatestone District Centre	n/a	4	25	62	102
Other Brentwood Borough	n/a	3	23	56	92
Total	**n/a**	**232**	**1,591**	**3,898**	**6,458**

Table A: Study Area Population - High Population Projections

Zone	2011	2014	2015	2020	2025	2030
Zone 1 - Brentwood/Shenfield	24,753	25,566	25,837	27,192	28,546	29,901
Zone 2 - Hutton	15,578	16,090	16,260	17,113	17,965	18,818
Zone 3 - Ingatestone	9,773	10,094	10,201	10,736	11,271	11,806
Zone 4 - Pilgrims Hatch	13,812	14,266	14,417	15,173	15,929	16,685
Zone 5 - Herongate/Ingrave	9,685	10,003	10,109	10,639	11,169	11,699
Total	**73,601**	**76,018**	**76,824**	**80,852**	**84,880**	**88,909**

Source:

Experian 2011 (Census data)

Population growth assumes 413 dwellings p.a. in Brentwood

Table B: Summary of Comparison Goods Expenditure 2014 to 2030 - High Population Projections

Centre	2014	2015	2020	2025	2030
Available Expenditure in Brentwood Borough (£m)					
Brentwood (incl. Wickes)	89.71	92.46	108.17	130.38	157.37
Warley Hill, Brentwood Station	0.67	0.69	0.81	0.97	1.17
Shenfield District Centre	1.88	1.94	2.27	2.73	3.30
Ingatestone District Centre	1.51	1.56	1.82	2.19	2.65
Other Brentwood Borough	1.36	1.40	1.64	1.97	2.38
Total	**95.12**	**98.04**	**114.69**	**138.25**	**166.87**
Turnover of Existing Facilities (£m)					
Brentwood (incl. Wickes)	89.71	91.50	101.03	111.54	123.15
Warley Hill, Brentwood Station	0.67	0.68	0.75	0.83	0.92
Shenfield District Centre	1.88	1.92	2.12	2.34	2.58
Ingatestone District Centre	1.51	1.54	1.70	1.88	2.07
Other Brentwood Borough	1.36	1.38	1.53	1.69	1.86
Total	**95.12**	**97.03**	**107.13**	**118.28**	**130.59**
Surplus Expenditure (£m)					
Brentwood	n/a	0.96	7.14	18.84	34.22
Warley Hill, Brentwood Station	n/a	0.01	0.05	0.14	0.26
Shenfield District Centre	n/a	0.02	0.15	0.39	0.72
Ingatestone District Centre	n/a	0.02	0.12	0.32	0.58
Other Brentwood Borough	n/a	0.01	0.11	0.28	0.52
Total	**n/a**	**1.01**	**7.57**	**19.98**	**36.28**

Table C: Comparison Goods Floorspace Capacity 2014 to 2030 - High Population Projections

Centre	2014	2015	2020	2025	2030
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,100	£5,631	£6,217	£6,864
Floorspace Requirement (sq.m net)					
Brentwood	n/a	188	1,268	3,030	4,985
Warley Hill, Brentwood Station	n/a	1	9	23	37
Shenfield District Centre	n/a	4	27	64	104
Ingatestone District Centre	n/a	3	21	51	84
Other Brentwood Borough	n/a	3	19	46	75
Total	**n/a**	**199**	**1,344**	**3,213**	**5,286**
Floorspace Requirement (sq.m gross)					
Brentwood	n/a	250	1,690	4,041	6,647
Warley Hill, Brentwood Station	n/a	2	13	30	50
Shenfield District Centre	n/a	5	35	85	139
Ingatestone District Centre	n/a	4	28	68	112
Other Brentwood Borough	n/a	4	26	61	100
Total	**n/a**	**265**	**1,792**	**4,285**	**7,048**

Appendix 4 Food and Drink Capacity

Table 1: Food and Drink Expenditure per person (£)

Zone	2014	2015	2020	2025	2030
Zone 1 - Brentwood/Shenfield	1,194	1,211	1,298	1,391	1,491
Zone 2 - Hutton	1,223	1,240	1,329	1,425	1,528
Zone 3 - Ingatestone	1,277	1,295	1,388	1,488	1,596
Zone 4 - Pilgrims Hatch	1,160	1,176	1,261	1,351	1,449
Zone 5 - Herongate/Ingrave	1,207	1,224	1,312	1,406	1,508

Sources:

Experian Local Expenditure 2012 (2012 prices)

Growth Rates: -0.2% 2012-2013, 0.7% 2013-2014, and 1.4% from 2014

Table 2: Total Food and Drink Expenditure (£m)

Zone	2014	2015	2020	2025	2030
Zone 1 - Brentwood/Shenfield	30.40	31.12	34.90	39.06	43.65
Zone 2 - Hutton	19.60	20.06	22.50	25.18	28.14
Zone 3 - Ingatestone	12.84	13.14	14.74	16.50	18.44
Zone 4 - Pilgrims Hatch	16.48	16.87	18.92	21.17	23.66
Zone 5 - Herongate/Ingrave	12.03	12.31	13.80	15.45	17.26
Total	**91.35**	**93.50**	**104.86**	**117.37**	**131.14**

Source: Table 1 and Table 1, Appendix 2

Table 3: Base Year 2014 Food and Drink Market Shares (%)

Centre/Facility	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	% Inflow
Brentwood Town Centre	56.7%	39.4%	20.3%	60.6%	40.2%	10.0%
Shenfield District Centre	9.2%	14.8%	4.6%	0.8%	1.0%	5.0%
Ingatestone District Centre	0.3%	2.8%	23.2%	1.1%	1.0%	5.0%
Other Brentwood Borough	4.8%	6.3%	11.7%	11.8%	10.1%	5.0%
Brentwood Borough Total	**71.0%**	**63.3%**	**59.8%**	**74.3%**	**52.3%**	
Basildon	1.7%	3.7%	0.3%	0.0%	1.4%	n/a
Billericay	1.8%	12.0%	1.3%	1.8%	0.4%	n/a
Romford	1.1%	1.3%	1.4%	3.1%	0.0%	n/a
Chelmsford	2.1%	3.0%	17.6%	2.8%	0.0%	n/a
intu Lakeside	3.0%	0.6%	0.8%	0.5%	1.2%	n/a
Other	19.3%	16.1%	18.8%	17.5%	44.7%	n/a
Other Sub-Total	**29.0%**	**36.7%**	**40.2%**	**25.7%**	**47.7%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey June 2014

Table 4: Base Year 2014 Food and Drink Expenditure (£m)

Centre/Facility	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Inflow	Total
Expenditure 2014	**30.40**	**19.60**	**12.84**	**16.48**	**12.03**		
Brentwood Town Centre	17.24	7.72	2.61	9.99	4.83	4.71	47.10
Shenfield District Centre	2.80	2.90	0.59	0.13	0.12	0.34	6.89
Ingatestone District Centre	0.09	0.55	2.98	0.18	0.12	0.21	4.13
Other Brentwood Borough	1.46	1.23	1.50	1.94	1.21	0.39	7.74
Brentwood Borough Total	**21.59**	**12.41**	**7.68**	**12.24**	**6.29**	**5.65**	**65.86**
Basildon	0.52	0.73	0.04	0.00	0.17	n/a	1.45
Billericay	0.55	2.35	0.17	0.30	0.05	n/a	3.41
Romford/Harold Hill	0.33	0.25	0.18	0.51	0.00	n/a	1.28
Chelmsford	0.64	0.59	2.26	0.46	0.00	n/a	3.95
intu Lakeside	0.91	0.12	0.10	0.08	0.14	n/a	1.36
Other	5.87	3.16	2.41	2.88	5.38	n/a	19.70
Other Sub-Total	**8.82**	**7.19**	**5.16**	**4.24**	**5.74**		**31.15**
TOTAL	**30.40**	**19.60**	**12.84**	**16.48**	**12.03**		**97.00**

Source: Table 2 and 3

Table 5: Food and Drink Expenditure 2015 (£m)

Centre/Facility	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Inflow	Total
Expenditure 2015	**31.12**	**20.06**	**13.14**	**16.87**	**12.31**		
Brentwood Town Centre	17.64	7.90	2.67	10.22	4.95	4.82	48.20
Shenfield District Centre	2.86	2.97	0.60	0.13	0.12	0.35	7.05
Ingatestone District Centre	0.09	0.56	3.05	0.19	0.12	0.21	4.22
Other Brentwood Borough	1.49	1.26	1.54	1.99	1.24	0.40	7.92
Brentwood Borough Total	**22.09**	**12.70**	**7.86**	**12.53**	**6.44**	**5.78**	**67.40**
Basildon	0.53	0.74	0.04	0.00	0.17	n/a	1.48
Billericay	0.56	2.41	0.17	0.30	0.05	n/a	3.49
Romford/Harold Hill	0.34	0.26	0.18	0.52	0.00	n/a	1.31
Chelmsford	0.65	0.60	2.31	0.47	0.00	n/a	4.04
intu Lakeside	0.93	0.12	0.11	0.08	0.15	n/a	1.39
Other	6.01	3.23	2.47	2.95	5.50	n/a	20.16
Other Sub-Total	**9.02**	**7.36**	**5.28**	**4.33**	**5.87**		**31.88**
TOTAL	**31.12**	**20.06**	**13.14**	**16.87**	**12.31**		**99.28**

Source: Table 2 and 3

Table 6: Food and Drink Expenditure 2020 (£m)

Centre/Facility	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Inflow	Total
Expenditure 2020	**34.90**	**22.50**	**14.74**	**18.92**	**13.80**		
Brentwood Town Centre	19.79	8.86	2.99	11.46	5.55	5.41	54.06
Shenfield District Centre	3.21	3.33	0.68	0.15	0.14	0.40	7.90
Ingatestone District Centre	0.10	0.63	3.42	0.21	0.14	0.24	4.74
Other Brentwood Borough	1.68	1.42	1.72	2.23	1.39	0.44	8.89
Brentwood Borough Total	**24.78**	**14.24**	**8.82**	**14.05**	**7.22**	**6.48**	**75.59**
Basildon	0.59	0.83	0.04	0.00	0.19	n/a	1.66
Billericay	0.63	2.70	0.19	0.34	0.06	n/a	3.92
Romford/Harold Hill	0.38	0.29	0.21	0.59	0.00	n/a	1.47
Chelmsford	0.73	0.67	2.59	0.53	0.00	n/a	4.53
intu Lakeside	1.05	0.13	0.12	0.09	0.17	n/a	1.56
Other	6.74	3.62	2.77	3.31	6.17	n/a	22.61
Other Sub-Total	**10.12**	**8.26**	**5.93**	**4.86**	**6.58**		**35.75**
TOTAL	**34.90**	**22.50**	**14.74**	**18.92**	**13.80**		**111.34**

Source: Table 2 and 3

Table 7: Food and Drink Expenditure 2025 (£m)

Centre/Facility	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Inflow	Total
Expenditure 2025	**39.06**	**25.18**	**16.50**	**21.17**	**15.45**		
Brentwood Town Centre	22.15	9.92	3.35	12.83	6.21	6.05	60.51
Shenfield District Centre	3.59	3.73	0.76	0.17	0.15	0.44	8.85
Ingatestone District Centre	0.12	0.71	3.83	0.23	0.15	0.27	5.30
Other Brentwood Borough	1.87	1.59	1.93	2.50	1.56	0.50	9.95
Brentwood Borough Total	**27.73**	**15.94**	**9.87**	**15.73**	**8.08**	**7.26**	**84.61**
Basildon	0.66	0.93	0.05	0.00	0.22	n/a	1.86
Billericay	0.70	3.02	0.21	0.38	0.06	n/a	4.38
Romford/Harold Hill	0.43	0.33	0.23	0.66	0.00	n/a	1.64
Chelmsford	0.82	0.76	2.90	0.59	0.00	n/a	5.07
intu Lakeside	1.17	0.15	0.13	0.11	0.19	n/a	1.75
Other	7.54	4.05	3.10	3.71	6.91	n/a	25.31
Other Sub-Total	**11.33**	**9.24**	**6.63**	**5.44**	**7.37**		**40.02**
TOTAL	**39.06**	**25.18**	**16.50**	**21.17**	**15.45**		**124.63**

Source: Table 2 and 3

Table 8: Food and Drink Expenditure 2030 (£m)

Centre/Facility	Zone 1 Brentwood/ Shenfield	Zone 2 Hutton	Zone 3 Ingatestone	Zone 4 Pilgrims Hatch	Zone 5 Herongate/ Ingrave	Inflow	Total
Expenditure 2030	**43.65**	**28.14**	**18.44**	**23.66**	**17.26**		
Brentwood Town Centre	24.75	11.09	3.74	14.34	6.94	6.76	67.61
Shenfield District Centre	4.02	4.16	0.85	0.19	0.17	0.49	9.88
Ingatestone District Centre	0.13	0.79	4.28	0.26	0.17	0.30	5.93
Other Brentwood Borough	2.09	1.77	2.16	2.79	1.74	0.56	11.12
Brentwood Borough Total	**30.99**	**17.81**	**11.02**	**17.58**	**9.03**	**8.11**	**94.54**
Basildon	0.74	1.04	0.06	0.00	0.24	n/a	2.08
Billericay	0.79	3.38	0.24	0.43	0.07	n/a	4.90
Romford/Harold Hill	0.48	0.37	0.26	0.73	0.00	n/a	1.84
Chelmsford	0.92	0.84	3.24	0.66	0.00	n/a	5.67
intu Lakeside	1.31	0.17	0.15	0.12	0.21	n/a	1.95
Other	8.42	4.53	3.47	4.14	7.72	n/a	28.28
Other Sub-Total	**12.66**	**10.33**	**7.41**	**6.08**	**8.23**		**44.71**
TOTAL	**43.65**	**28.14**	**18.44**	**23.66**	**17.26**		**139.25**

Source: Table 2 and 3

Table 9: Summary of Food and Drink Expenditure 2014 to 2030

Centre	2014	2015	2020	2025	2030
Available Expenditure in Brentwood Borough (£m)					
Brentwood	47.10	48.20	54.06	60.51	67.61
Shenfield District Centre	6.89	7.05	7.90	8.85	9.88
Ingatestone District Centre	4.13	4.22	4.74	5.30	5.93
Other Brentwood Borough	7.74	7.92	8.89	9.95	11.12
Total	**65.86**	**67.40**	**75.59**	**84.61**	**94.54**
Turnover of Existing Facilities (£m)					
Brentwood	47.10	47.57	50.00	52.55	55.23
Shenfield District Centre	6.89	6.95	7.31	7.68	8.07
Ingatestone District Centre	4.13	4.17	4.38	4.60	4.84
Other Brentwood Borough	7.74	7.82	8.22	8.64	9.08
Total	**65.86**	**66.51**	**69.91**	**73.47**	**77.22**
Surplus Expenditure (£m)					
Brentwood	0.00	0.63	4.06	7.97	12.38
Shenfield District Centre	0.00	0.09	0.59	1.16	1.81
Ingatestone District Centre	0.00	0.06	0.36	0.70	1.09
Other Brentwood Borough	0.00	0.10	0.67	1.31	2.04
Total	**0.00**	**0.89**	**5.68**	**11.14**	**17.32**

Table 10: Food and Drink Floorspace Capacity 2014 to 2030

Centre	2014	2015	2020	2025	2030
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,050	£5,308	£5,578	£5,863
Floorspace Requirement (sq.m gross)					
Brentwood	n/a	126	766	1,428	2,112
Shenfield District Centre	n/a	18	112	209	309
Ingatestone District Centre	n/a	11	67	125	185
Other Brentwood Borough	n/a	21	126	235	347
Total	**n/a**	**175**	**1,071**	**1,997**	**2,954**

Appendix 5 Audit of Centres

A. Brentwood

Brentwood is the main shopping and commercial centre within Brentwood District and is located approximately 20 miles north-east of central London. Brentwood has a traditional and attractive high street with a mix of multiple and independent outlets. The key roles of Brentwood include:

- **Convenience Shopping**: main and top-up food and grocery shopping facilities. The centre is home to the biggest supermarket within the Borough – Sainsbury's. It also has a number of medium-sized supermarkets such as Co-op and M&S. These food stores are supported by a selection of specialist food stores including bakers.
- **Comparison Shopping**: there is a mix of national multiple retailers and small independent traders. Wilkinson and M&S are the two largest stores. Most national multiples are located on the high street
- **Services**: provides a good range and choice of services including high street banks, estate agents, hairdressers, cafes, restaurants and takeaways.

Mix of Uses and Retailer Occupation

Brentwood has a total of 258 retail/service uses. The diversity of uses present in Brentwood in terms of the number of ground floor units is set out in Table A.1, compared against the national average.

Table A.1 Brentwood Use Class Mix by Unit

Type of Unit	Units 2014	Units 2011 (3)	% of Total Number of Units	
			Brentwood	UK Average (1)
Comparison Retail	110	92	42.6	36.0
Convenience Retail	13	13	5.1	8.1
A1 Services (2)	43	127	16.7	14.1
A2 Services	31		12.0	12.1
A3 Restaurants/Cafes	29		11.2	11.3
A4 Pubs/Bars	7		2.7	2.9
A5 Takeaways	9		3.5	3.4
Vacant	16	19	6.2	12.1
Total	**258**	**251**	**100.0**	**100.0**

Source: Goad and NLP Survey, 2014
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(3) Figures from 2011 Brentwood Retail and Commercial Leisure Study, combined figure for service uses

Brentwood has lower provision of convenience stores than the national average but a higher percentage of comparison stores. The centre has an average provision of services with the exception of A1 services, which is higher than the UK average.

Retailer Representation

Brentwood has a good selection of comparison shops (110) reflecting its size and role in the shopping hierarchy of the Borough. Table A.2 provides a breakdown of comparison shop units by category compared with the national average.

Table A.2 Brentwood Breakdown of Comparison Units

Type of Unit	Brentwood		% UK Average *
	Units	%	
Clothing and footwear	33	30.0	25.0
Furniture, carpets and textiles	10	9.1	7.4
Booksellers, arts, crafts and stationers	7	6.4	10.6
Electrical, gas, music and photography	10	9.1	9.4
DIY, hardware and homewares	5	4.5	6.4
China, glass, gifts and fancy goods	5	4.5	4.6
Cars, motorcycles and motor access	1	0.9	1.3
Chemists, drug stores and opticians	13	11.8	10.0
Variety, department and catalogue	4	3.6	1.6
Florists, nurserymen and seedsmen	1	0.9	2.3
Toys, hobby, cycle and sport	6	5.5	5.2
Jewellers	5	4.5	5.0
Charity/second hand shops	7	6.4	8.4
Other comparison retailers	3	2.7	2.9
Total	**110**	**100.0**	**100.0**

Source: Goad and NLP Survey, 2014
* UK average for all town centres surveyed by Goad Plans (March 2014)

The centre provides all of the GOAD comparison categories. The centre has a good provision of clothing and footwear shops and furniture, carpets and textiles. There is a below average provision of booksellers, arts, crafts and stationers, as well as DIY, hardware and homewares. The centre has a slightly below average provision of charity and secondhand shops.

Service Uses

Brentwood has a good range of non-retail services, with all categories well represented (see Table A.3). The mix of services is similar to the national average, although the centre has a higher proportion of hairdressers/beauty parlours and a lower proportion of fast food/takeaways. There is a mix of food and drink establishments including coffee shops, cafes, pubs and restaurants.

Table A.3 Brentwood Analysis of Selected Service Uses

Type of Unit	Brentwood		% UK Average *
	Units	%	
Restaurants/cafés	29	26.9	23.3
Fast food/takeaways	9	8.3	15.2
Pubs/bars	7	6.5	7.6
Banks/other financial services	12	11.1	12.9
Betting shops/casinos	4	3.7	4.0
Estate agents/valuers	11	10.2	9.5
Travel agents	2	1.9	2.5
Hairdressers/beauty parlours	33	30.6	22.9
Laundries/dry cleaners	1	0.9	2.2
Sub-Total	**108**	**100.0**	**100.0**
Other A1 Retail Services	11		
Total	**119**		

Source: Goad and NLP Survey, 2014
* UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were 16 vacant retail units within Brentwood town centre at the time of the survey in June 2014, giving a vacancy rate of 6.2%, half the national average of 12.1%. This suggests the demand for shop premises is relatively healthy. The number of vacant units has decreased slightly since 2011.

Summary of Brentwood's Strengths and Weaknesses

Strengths

- The centre provides a reasonable range and mix of both national multiple retailers and independent comparison retailers.
- The Sainsbury's supermarket acts as an anchor store, attracting customers to the town centre.
- The centre has a good range and choice of non-retail services. There is a good mix and choice of food and drink establishments.
- The centre's vacancy rate is much lower than the national average, which suggests demand for premises is strong.
- Overall, the attractive shopping environment is well maintained and pleasant.

Weaknesses

- Brentwood has a low proportion of convenience retail units, and the Sainsbury's store suffers from congestion at busy periods.
- The centre experiences some traffic congestion.

B. Warley Hill (Brentwood Station)

Warley Hill is located approximately 1 km to the south of the main town centre in Brentwood and is centred on Brentwood railway station.

The key roles of Warley Hill include:

- **Convenience shopping**: There are a selection of independent convenience shops as well as a small Londis supermarket and an off-licence.
- **Comparison shopping:** Predominantly small independent retailers, including three bridal-wear shops.
- **Services:** provides a reasonable range and choice of services, including hairdressers and takwaways.

Mix of Uses and Retailer Occupation

Warley Hill has a total of 58 retail/service uses. The diversity of uses present in Warley Hill in terms of the number of ground floor units is set out in Table B.1, compared against the national average.

Table B.1 Warley Hill Use Class Mix by Unit

Type of Unit	Units 2014	Units 2011 [3]	% of Total Number of Units	
			Warley Hill	UK Average [1]
Comparison Retail	15	14	25.8	36.0
Convenience Retail	8	7	13.8	8.1
A1 Services [2]	12	35	20.7	14.1
A2 Services	4		6.9	12.1
A3 Restaurants/Cafes	3		5.2	11.3
A4 Pubs/Bars	3		5.2	2.9
A5 Takeaways	8		13.8	3.4
Vacant	5	7	8.6	12.1
Total	**58**	**63**	**100.0**	**100.0**

Source: NLP Survey, 2014
[1] UK average for all town centres surveyed by Goad Plans (March 2014)
[2] incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
[3] Figures from 2011 Brentwood Retail and Commercial Leisure Study, combined figure for service uses

The mix of uses has not changed considerably since 2011. Warley Hill continues to have a lower proportion of comparison shops compared with the national average, and a higher proportion of convenience shops and Class A1 services (e.g. hairdressers). This mix of uses is characteristic of small centres that serve local shopping/service needs.

Retailer Representation

Warley Hill has a small selection of comparison shops (14) compared with Brentwood, reflecting its role as a local shopping area. Table B.2 provides a breakdown of comparison shop units by category. The number of comparison shops has remained broadly the same since 2014, but this sector continues to be dominated by bridal-clothing shops and florists.

Table B.2 Warley Hill Breakdown of Comparison Units

Type of Unit	Warley Hill		% UK Average *
	Units	%	
Clothing and footwear	3	20.0	25.0
Furniture, carpets and textiles	1	6.7	7.4
Booksellers, arts, crafts and stationers	0	0.0	10.6
Electrical, gas, music and photography	2	13.3	9.4
DIY, hardware and homewares	2	13.3	6.4
China, glass, gifts and fancy goods	1	6.7	4.6
Cars, motorcycles and motor access	0	0.0	1.3
Chemists, drug stores and opticians	0	0.0	10.0
Variety, department and catalogue	0	0.0	1.6
Florists, nurserymen and seedsmen	3	20.0	2.3
Toys, hobby, cycle and sport	0	0.0	5.2
Jewellers	1	6.7	5.0
Charity/second hand shops	0	0.0	8.4
Other comparison retailers	2	13.3	2.9
Total	**15**	**100.0**	**100.0**

Source: NLP Survey, 2014
* UK average for all town centres surveyed by Goad Plans (March 2014)

The centre does not provide outlets within all Goad Plan comparison categories, with six of the 13 categories not represented. The choice of shop units within the other categories is limited.

Service Uses

Warley Hill has a reasonable range of non-retail service uses, with all categories represented, with the exception of travel agents. The provision of hairdressers/beauty parlours and fast food/takeaways is especially good, but banks and restaurants are under-provided.

Table B.3 Warley Hill Analysis of Selected Service Uses

Type of Unit	Warley Hill		% UK Average *
	Units	%	
Restaurants/cafés	3	10.7	23.3
Fast food/takeaways	8	28.6	15.2
Pubs/bars	3	10.7	7.6
Banks/other financial services	1	3.6	12.9
Betting shops/casinos	1	3.6	4.0
Estate agents/valuers	2	7.1	9.5
Travel agents	0	0	2.5

Type of Unit	Warley Hill		% UK Average *
	Units	%	
Hairdressers/beauty parlours	8	28.6	22.9
Laundries/dry cleaners	2	7.1	2.2
Sub-Total	**28**	**100.0**	**100.0**
Other A1 Retail Services	2		
Total	**30**		

Source: NLP Survey, 2014
* UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

The centre has five vacant units, representing 8.6% which is lower than the national average of 12.1%.

Summary of Warley Hill's Strengths and Weaknesses

Strengths

- There is a good provision of convenience retailing within the centre.
- The centre has a reasonable range of services that meet the day to day needs of residents.
- The vacancy rate is lower than the national average.
- The centre has very good transport links, including Brentwood Railway Station.
- The centre provides a range of specialist bridal shops.

Weaknesses

- The centre has a very limited range of comparison retailers.
- The proportion of clothing retails is bolstered by the three bridal shops. There are no other clothing shops represented.
- The centre is located on a busy main road, making it difficult to cross and not a very pleasant environment to spend a lot of time.

C. Shenfield

Shenfield is within the wider Brentwood urban area, located north east of Brentwood town centre.

The key roles of Shenfield include:

- **Convenience shopping:** including a Tesco Express providing a top-up shopping role.
- **Comparison shopping:** the centre comprises a small range of independent retailers.
- **Services:** provides a range and choice of hairdressers, cafes, restaurants and takeaways.

Mix of Uses and Retailer Occupation

Shenfield has a total of 58 retail/service units. The diversity of uses present in Shenfield in terms of the number of ground floor units is set out in Table C.1, compared against the national average.

Table C.1 Shenfield Use Class Mix by Unit

Type of Unit	Units 2014	Units 2011 (3)	% of Total Number of Units	
			Shenfield	UK Average (1)
Comparison Retail	13	26	22.4	36.0
Convenience Retail	8	14	13.8	8.1
A1 Services (2)	11	45	19.0	14.1
A2 Services	9		15.5	12.1
A3 Restaurants/Cafes	8		13.8	11.3
A4 Pubs/Bars	1		1.7	2.9
A5 Takeaways	5		8.6	3.4
Vacant	3	5	5.2	12.1
Total	**58**	**90**	**100.0**	**100.0**

Source: NLP Survey, 2014
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(3) Figures from 2011 Brentwood Retail and Commercial Leisure Study, combined figure for service uses

It should be noted that the 2011 Retail and Commercial Leisure Study covered a wider area than the defined frontages within the Local Plan, which accounts for the difference in the total number of units.

The centre's mix of units varies quite substantially from the national average. It has a much lower proportion of comparison retail and a higher proportion of convenience retail compared with the national average. It has a much lower vacancy rate than the national average (5.2%).

Retailer Representation

Shenfield has a small selection of comparison shops (13), consistent with its overall size and its service centre role within the retail hierarchy. Table C.2 provides a breakdown of comparison shop units by category.

Table C.2 Shenfield Breakdown of Comparison Units

Type of Unit	Shenfield		% UK Average *
	Units	%	
Clothing and footwear	2	15.4	25.0
Furniture, carpets and textiles	0	0	7.4
Booksellers, arts, crafts and stationers	0	0	10.6
Electrical, gas, music and photography	1	7.7	9.4
DIY, hardware and homewares	1	7.7	6.4
China, glass, gifts and fancy goods	3	23.1	4.6
Cars, motorcycles and motor access	0	0	1.3
Chemists, drug stores and opticians	3	23.1	10.0
Variety, department and catalogue	0	0	1.6
Florists, nurserymen and seedsmen	0	0	2.3
Toys, hobby, cycle and sport	0	0	5.2
Jewellers	1	7.7	5.0
Charity/second hand shops	2	15.4	8.4
Other comparison retailers	0	0	2.9
Total	**13**	**100.0**	**100.0**

Source: NLP Survey, 2014
* UK average for all town centres surveyed by Goad Plans (March 2014)

The centre does not provide any furniture/carpets/textiles, booksellers/arts/crafts/stationers, cars/motorcycles/motor access, variety/department/catalogue, florists/nurserymen/seedsmen and toys/hobby/cycle/sport. There is a high proportion of china/glass/gifts/fancy goods and chemists/drugstores/opticians when compared to the national average. The proportion of clothing/footwear is well below the national average.

Service Uses

Shenfield has a reasonable range of non-retail service uses, with all categories represented (Table C.3), reflecting the size and role of Shenfield within the shopping hierarchy.

Table C.3 Shenfield Analysis of Selected Service Uses

Type of Unit	Shenfield		% UK Average *
	Units	%	
Restaurants/cafés	7	21.9	23.3
Fast food/takeaways	5	15.6	15.2
Pubs/bars	1	3.1	7.6

Type of Unit	Shenfield		% UK Average *
	Units	%	
Banks/other financial services	5	15.6	12.9
Betting shops/casinos	1	3.1	4.0
Estate agents/valuers	3	9.4	9.5
Travel agents	1	3.1	2.5
Hairdressers/beauty parlours	7	21.9	22.9
Laundries/dry cleaners	2	6.3	2.2
Sub-Total	**32**	**100.0**	**100.0**
Other A1 Retail Services	2		
Total	**34**		

Source: NLP Survey, 2014
* UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were only three vacant units within Shenfield at the time of the NLP survey, giving a vacancy rate of 5.2%, significantly below the national average of 12.1%.

Summary of Shenfield's Strengths and Weaknesses

Strengths

- There is a good provision of convenience retail for top-up shopping.
- The centre has a good range of non-retail service uses.
- The vacancy rate is very low.

Weaknesses

- There is a small range of comparison retailers with limited choice.
- Food stores are small and do not attract a significant proportion of main and bulk food shopping trips.

D. Ingatestone

Ingatestone is located approximately 3 km to the northeast of Shenfield.

The key roles of Ingatestone include:

- **Convenience shopping:** including a Budgens and Co-op supermarket. These provide a top-up shopping role;
- **Comparison shopping:** the centre comprises a good range of independent retailers;
- **Services:** provides a range of services including estate agents, hairdressers, restaurants, cafes and takeaways.

Mix of Uses and Retailer Occupation

Ingatestone has a total of 59 retail/service uses. The diversity of uses present in Ingatestone in terms of the number of ground floor units is set out in Table D.1, compared against the national average.

Table D.1 Ingatestone Use Class Mix by Unit

Type of Unit	Units 2014	Units 2011 [3]	% of Total Number of Units	
			Ingatestone	UK Average [1]
Comparison Retail	27	25	45.7	36.0
Convenience Retail	6	7	10.2	8.1
A1 Services [2]	8	27	13.5	14.1
A2 Services	7		11.9	12.1
A3 Restaurants/Cafes	6		10.2	11.3
A4 Pubs/Bars	2		3.4	2.9
A5 Takeaways	1		1.7	3.4
Vacant	2	3	3.4	12.1
Total	**59**	**62**	**100.0**	**100.0**

Source: NLP Survey, 2014
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(3) Figures from 2011 Brentwood Retail and Commercial Leisure Study, combined figure for service uses

The centre's mix of units is broadly similar to the national average although it has a much higher proportion of comparison retail units when compared to the national average. The vacancy rate is very low – there are only two vacant units, giving a vacancy rate of 3.4%, much lower than the national average, suggesting the centre is healthy.

Retailer Representation

Ingatestone has a higher proportion of comparison retail units when compared with the national average but a limited range, with five of the Goad categories not represented. Table D.2 provides a breakdown of comparison units by category.

Table D.2 Ingatestone Breakdown of Comparison Units

Type of Unit	Ingatestone		% UK Average *
	Units	%	
Clothing and footwear	9	33.3	25.0
Furniture, carpets and textiles	2	7.4	7.4
Booksellers, arts, crafts and stationers	2	7.4	10.6
Electrical, gas, music and photography	0	0.0	9.4
DIY, hardware and homewares	3	11.1	6.4
China, glass, gifts and fancy goods	3	11.1	4.6
Cars, motorcycles and motor access	0	0.0	1.3
Chemists, drug stores and opticians	2	7.4	10.0
Variety, department and catalogue	0	0.0	1.6
Florists, nurserymen and seedsmen	3	11.1	2.3
Toys, hobby, cycle and sport	0	0.0	5.2
Jewellers	2	7.4	5.0
Charity/second hand shops	0	0.0	8.4
Other comparison retailers	1	3.7	2.9
Total	**27**	**100.0**	**100.0**

Source: NLP Survey, 2014
* UK average for all town centres surveyed by Goad Plans (March 2014)

The centre does not provide any electrical/gas/music/photography, cars/ motorcycles/motor access, variety/department/catalogue and charity/ second hand shops. There is a high proportion of clothing and footwear shops when compared with the national average, but a low proportion of chemists/ drug stores/opticians.

Service Uses

Ingatestone has a good range of non-retail service uses, with all categories represented.

Table D.3 Ingatestone Analysis of Selected Service Uses

Type of Unit	Ingatestone		% UK Average *
	Units	%	
Restaurants/cafés	6	27.3	23.3
Fast food/takeaways	1	4.5	15.2
Pubs/bars	2	9.1	7.6
Banks/other financial services	2	9.1	12.9
Betting shops/casinos	1	4.5	4.0
Estate agents/valuers	4	18.2	9.5
Travel agents	1	4.5	2.5
Hairdressers/beauty parlours	4	18.2	22.9
Laundries/dry cleaners	1	4.5	2.2
Sub-Total	**22**	**100.0**	**100.0**

Type of Unit	Ingatestone		% UK Average *
	Units	%	
Other A1 Retail Services	2		
Total	**24**		

Source: NLP Survey, 2014
* UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were only two vacant units within Ingatestone at the time of NLP's survey, giving a vacancy rate of 3%, significantly below the national average of 12.1%.

Summary of Ingatestone's Strengths and Weaknesses

Strengths

- There is a good provision of clothing and footwear shops.
- Convenience shops are well represented.
- The vacancy rate is significantly lower than the national average.
- The centre is attractive and historic as well as being well maintained and pleasant.

Weaknesses

- Food stores are quite small and do not attract a significant proportion of main and bulk food shopping trips.
- The range of comparison retailers is fairly limited.
- The road through the centre is quite busy.

Appendix 6 Household Survey Results

Household Survey Results

Survey Structure

NEMS Market Research carried out a telephone survey of 800 households across the Brentwood Borough study area in June 2014. The study area was split into five zones, based on ward boundaries.

The number of interviews undertaken reflects the population in each zone in order to provide statistically reliable sub-samples. The main aims of the survey were to establish patterns for the following:

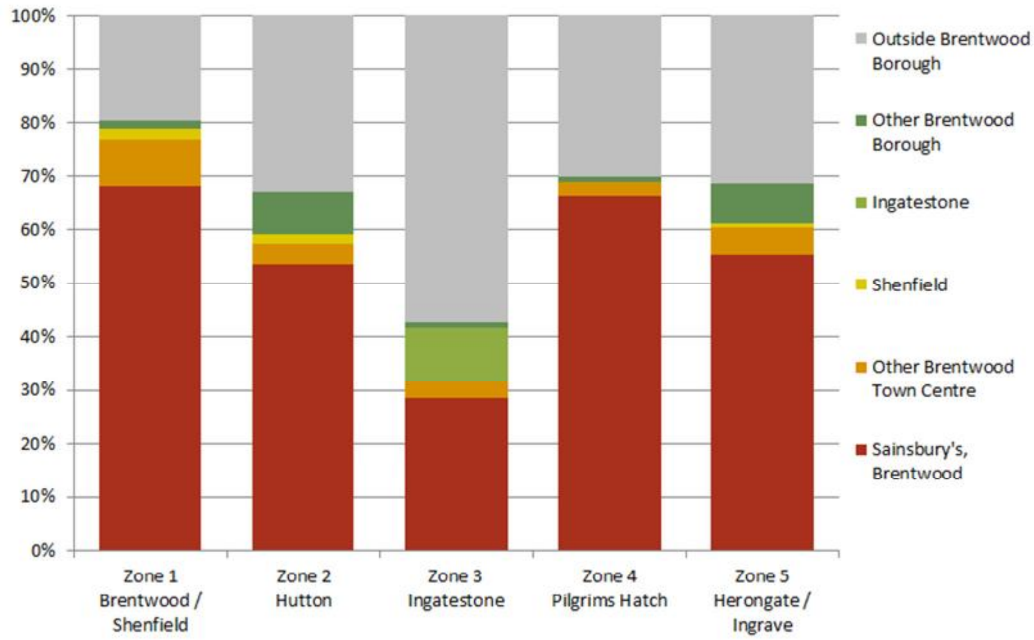
- Main food and top up grocery shopping;
- Non-food shopping, including:
  - clothing and footwear;
  - domestic electrical appliances;
  - other electrical goods (TV, Hi-Fi and computers);
  - furniture, soft furnishing or carpets;
  - DIY/hardware items and garden items;
  - chemist, health and beauty items; and
  - other non-food items (e.g. books, CDs, DVDs, toys and gifts).

Main Food Shopping

Respondents were asked where they last undertook their main food and grocery shopping. The Sainsbury's store on William Hunter Way, Brentwood was by far the most popular destination within Brentwood Borough, attracting over 58% of main food shopping trips for the Borough as a whole. The internet was used by 7.6% of respondents. The market share of main food shopping for the Sainsbury's store and the main centres is shown in Figure A below.

Zone 1 (Brentwood/Shenfield) retains the highest proportion of main food shopping within the Borough (80%). Zone 4 (Pilgrims Hatch) retains 70% of main food shopping within the Borough, followed by Zone 5 (Herongate/Ingrave – 69%) and Zone 2 (Hutton – 67%). Zone 3 (Ingatestone) retains the lowest proportion (43%), with spending leaking to stores and centres outside, in particular Chelmsford. The influence of stores and centres outside of Brentwood Borough is evident in Figure A below.

Figure A Main Food Shopping



Source: NEMS Household Survey June 2014

Mode of Travel for Main Food Shopping

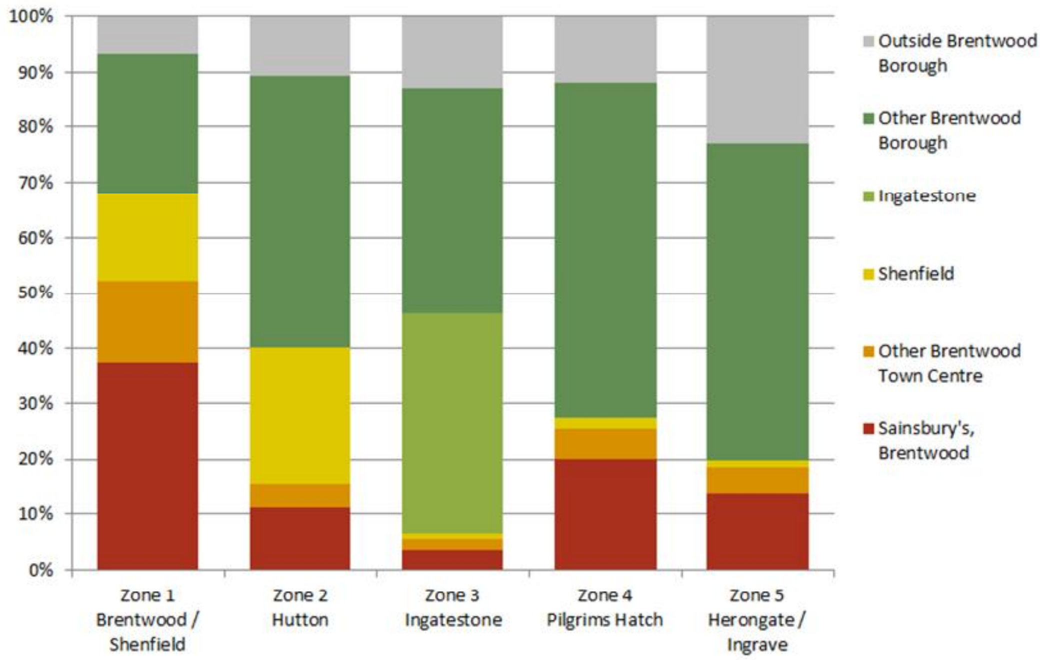
In the whole study area, 82.3% of respondents indicated that they travel to do their main food shopping by car (both driver and passenger) which is higher than the NLP average derived from similar surveys across the country (74.6%). This is typical for a rural borough. A lower proportion walk to their main food shopping destination (6.5%) compared to the NLP average of 11.7%, and a lower proportion of households travel by bus (3.9%) compared to the NLP averages derived from other surveys of 8.6%.

Top-Up Food Shopping

Top-up food shopping trips are normally made to supplement main food shopping trips and are undertaken on a more frequent basis for staples such as bread and milk. Around 78% of households across the catchment area indicated that they undertake small-scale or top-up shopping trips in addition to their main food shopping trips. The market share of top-up food shopping for each centre is shown in Figure B below.

While the Sainsbury's in Brentwood remains a popular destination, the patterns of top-up food shopping are more diverse, with smaller, local stores within the Borough capturing a higher proportion of the market share. Each zone retains a higher proportion of top-up spending within the Borough than for main food shopping. Zone 1 retains around 93% of top-up spending in the Borough, with the lowest proportion retained in Zone 5 (77%).

Figure B Top Up Food Shopping



Source: NEMS Household Survey June 2014

Non-Food Shopping

Respondents were asked in which location they buy most of their household's non-food shopping. For the study area as a whole, Brentwood town centre was the most popular destination with 39.1% of all respondents shopping there, followed by intu Lakeside (18.2%). 10.1% do most of their non-food shopping in Chelmsford and 5.4% in Romford. This demonstrates that while Brentwood is the most popular destination, 60% of non-food shopping is carried out outside the Borough. Overall 6.4% of respondents buy most of their non-food shopping on the internet or have it delivered. The Hutton zone has the highest proportion of respondents who buy most of their non-food shopping on the internet/by mail order (7.6%), followed by the Ingatestone zone (7.5%) and the Brentwood/ Shenfield zone (6.3%).

Mode of Travel for Non-Food Shopping

The predominant mode of travel for non-food shopping was the car (both driver and passenger) with 76.4% of respondents indicating that they use this form of travel. The second most popular mode of transport for travelling to non-food shopping destinations was by bus/coach (6.7%) followed by walking (4.9%).

Non-Food Shopping Destinations

The household survey asked specific questions to probe which destinations respondents last visited to undertake particular types of non-food shopping. The market share for each non-food goods category within Brentwood Borough is shown in the graphs below and overleaf. The influence of intu Lakeside, Chelmsford and other centres outside the Borough is clearly evident.

Figure C Clothing and Shoes

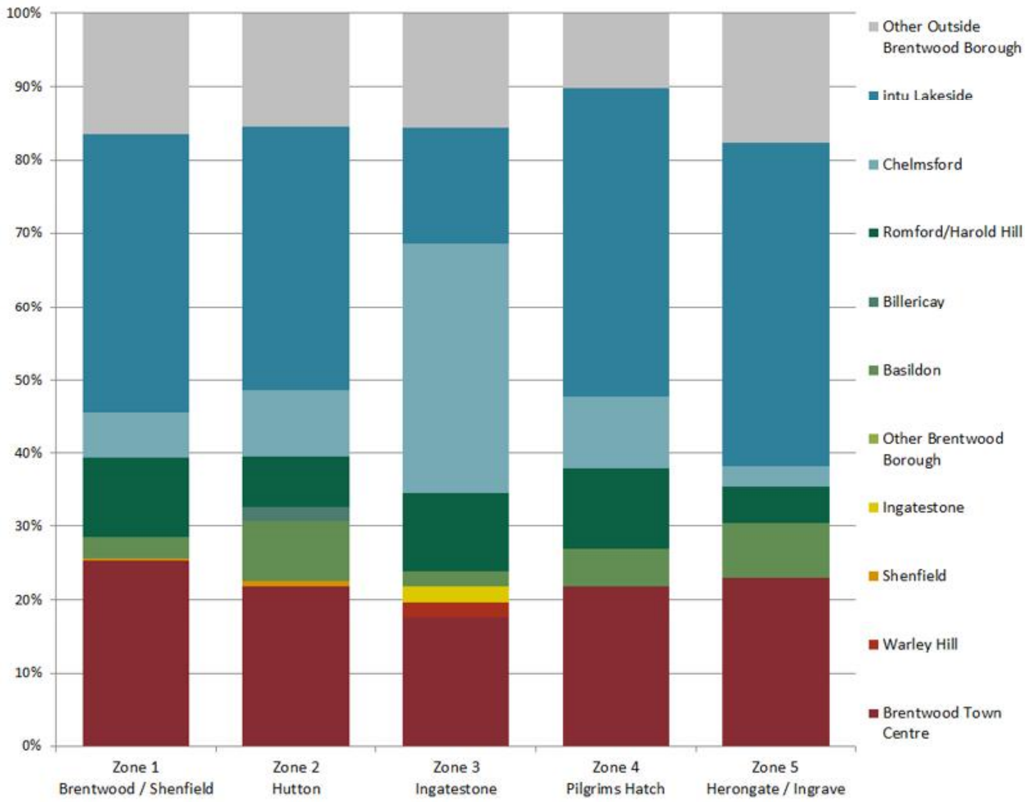
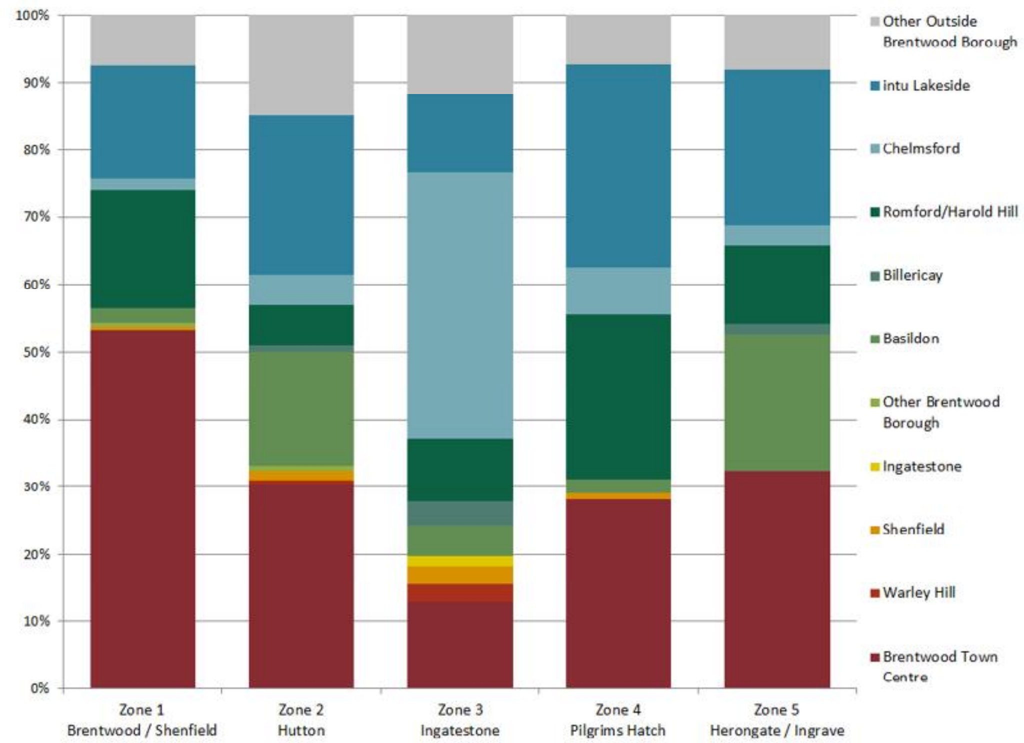


Figure D Domestic Electrical Appliances



Source: NEMS Household Survey June 2014

Figure E Other Electrical Goods

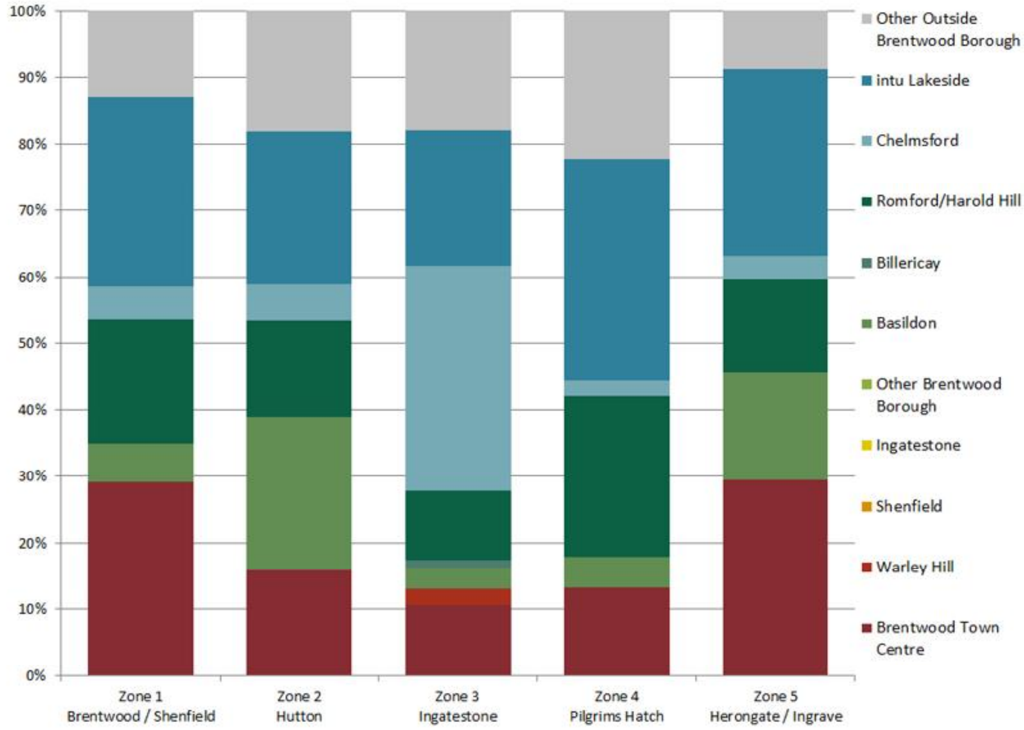
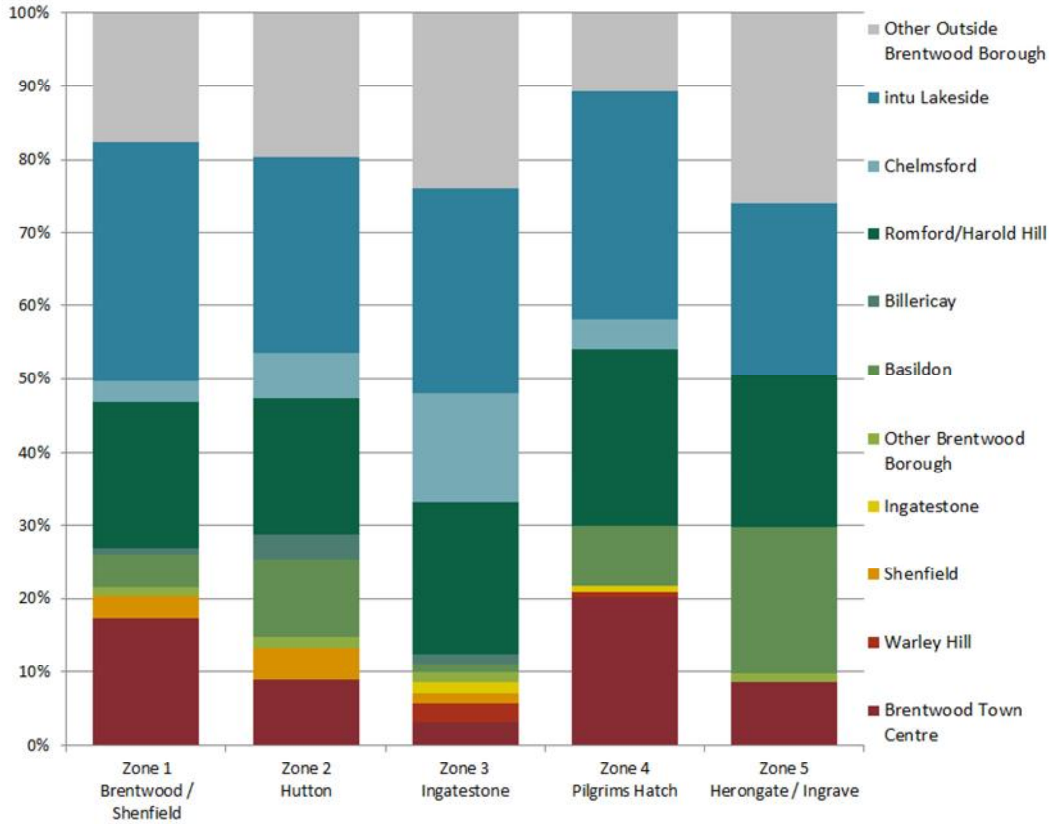


Figure F Furniture, Soft Furnishings and Floor Coverings



Source: NEMS Household Survey June 2014

Figure G DIY, Hardware and Garden Items

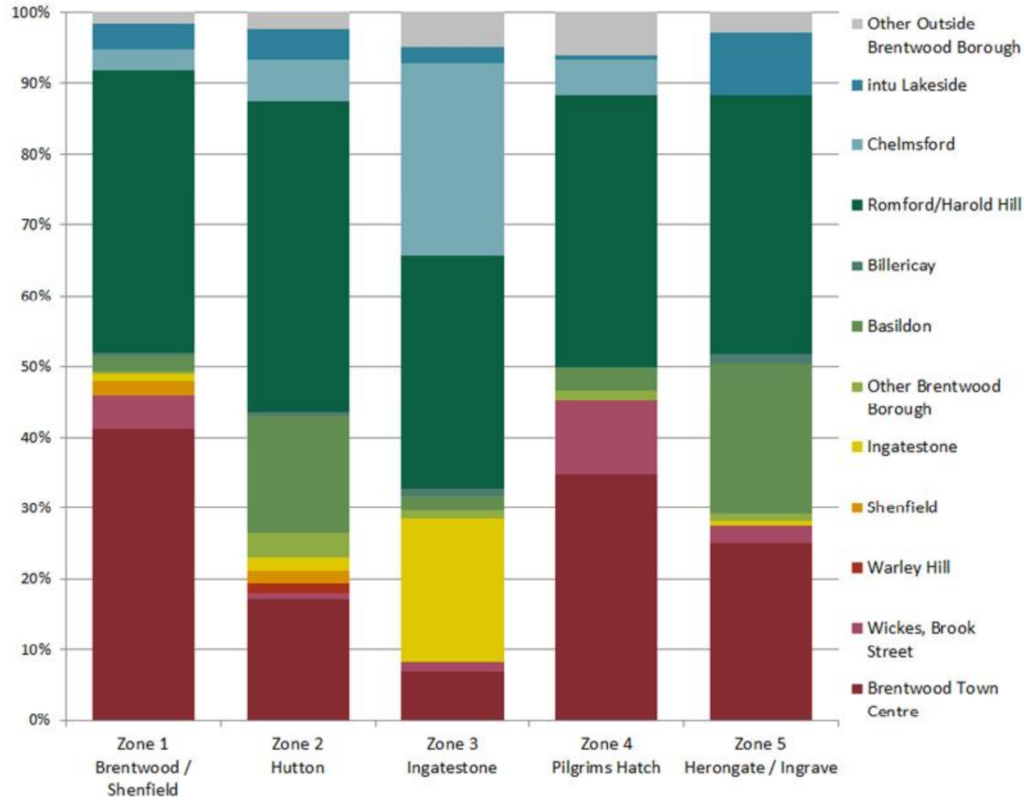
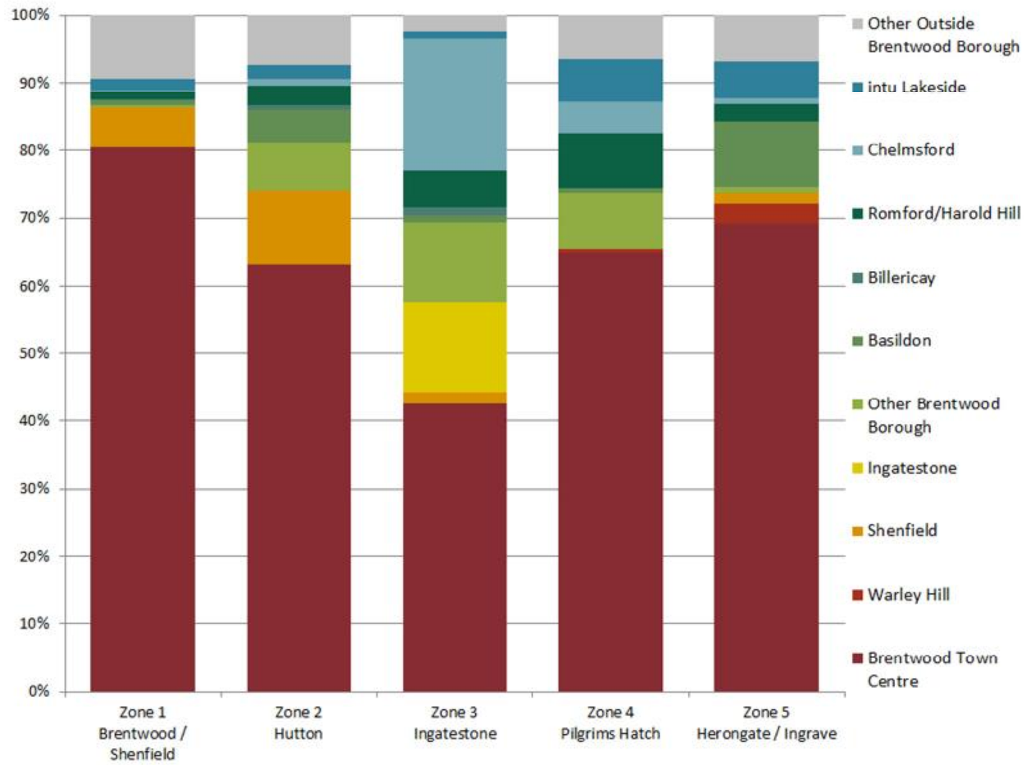
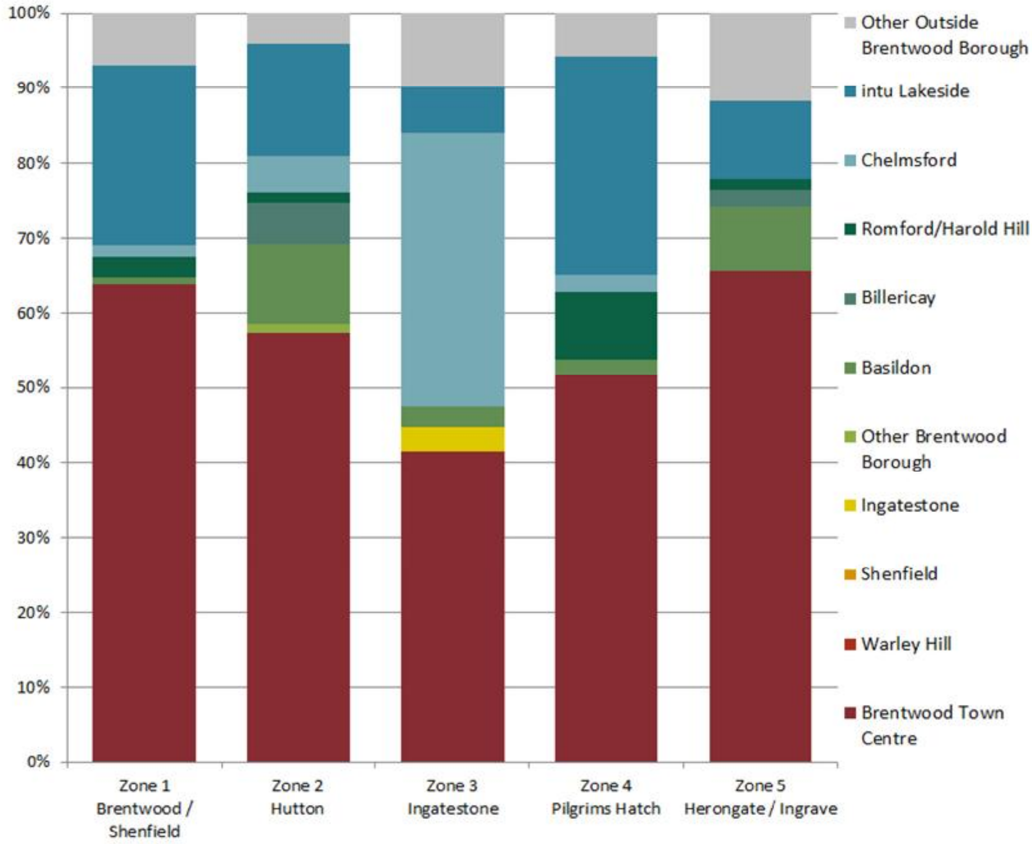


Figure H Health, Beauty and Chemist



Source: NEMS Household Survey June 2014

Figure I Books, CDs, Toys and Gifts



Source: NEMS Household Survey June 2014

Internet Shopping

Respondents were asked what goods they regularly buy on the internet. 39.0% stated that they did not regularly buy items on the internet. The most popular response was books and CDs (41.6%), clothes and shoes (20.8%) and electrical goods (13.1%). 9.2% regularly bought groceries via the internet.

Shoppers' Views

The household survey asked respondents what they liked and disliked above the main centres in the Borough.

Brentwood Town Centre: 81.6% of respondents stated that they regularly visit Brentwood town centre to use shops or services. Of those who regularly visit the centre, 25.4% responded that they liked "nothing" about the town centre. 30.9% responded that they liked the fact that the centre was convenient/close to home. Other factors that respondents liked included a good range of shops in general (18.7%) and accessibility (11.9%). In response to questions about what people disliked about Brentwood town centre, the most popular responses were "nothing" (27.8%), followed by a "poor range of shops in general" (23.4%), "not enough car parking" (14.1%) and "not enough free car parking" (13.5%). The results to these two questions are shown in Figures J and K below.

Figure J "Likes" about Brentwood Town Centre

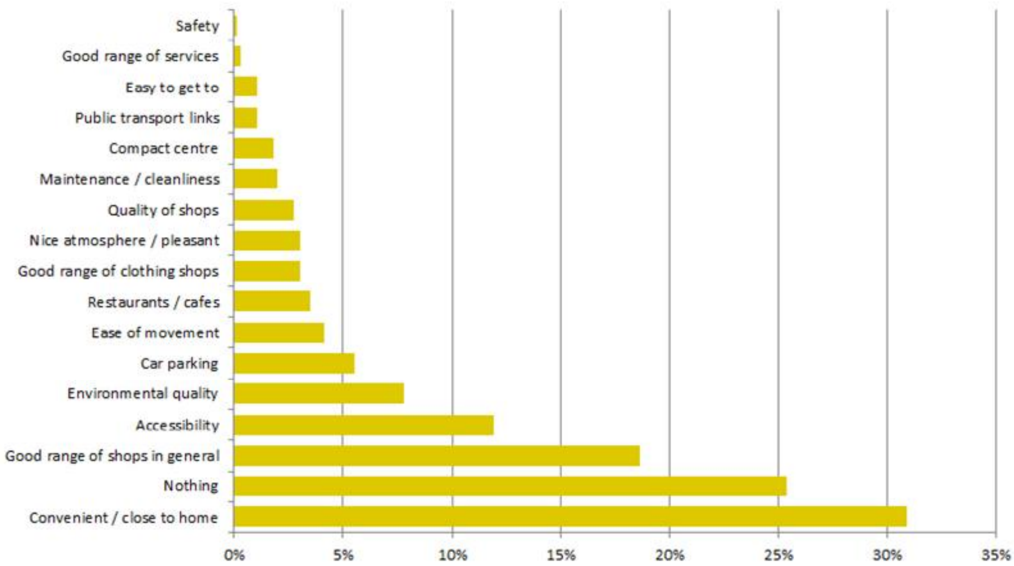
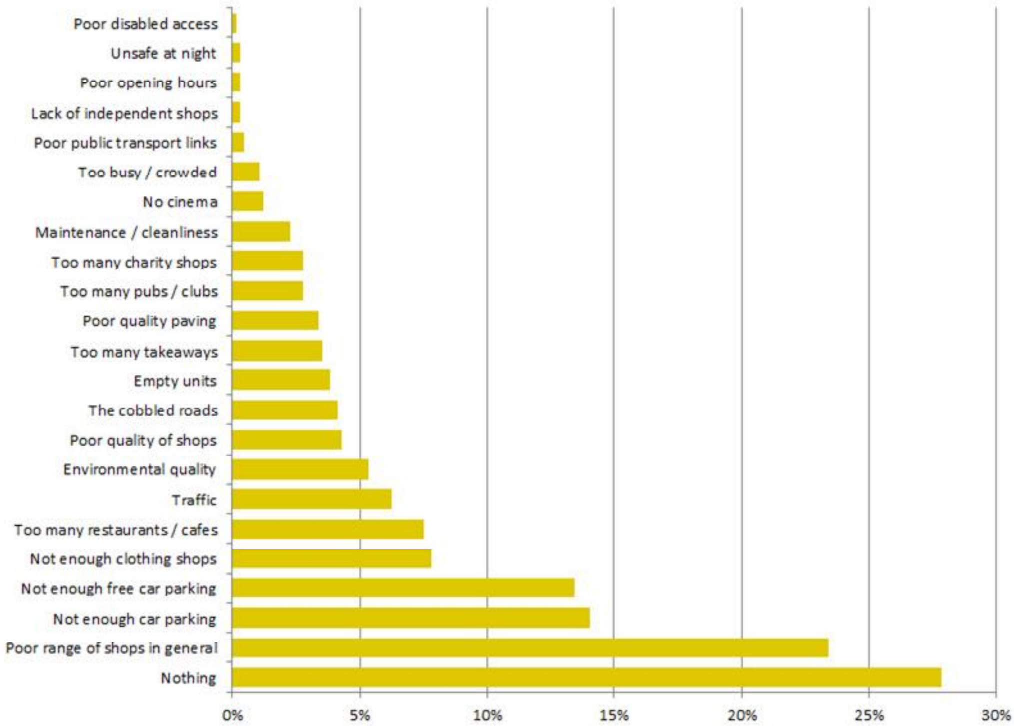


Figure K "Dislikes" about Brentwood Town Centre



Source: NEMS Household Survey June 2014

Shenfield District Centre: 41.9% of respondents stated that they regularly visit Shenfield district centre to use shops or services. Of those who regularly visit the centre, 17.6% responded that they liked "nothing" about the district centre. 23.2% responded that there was a good range of shops in general, and 21.1% liked the fact that the centre was convenient/close to home. In response to questions about what people disliked about Shenfield district centre, the most popular responses were “nothing” (42.9%), followed by “not enough car parking” (33.0%) and “not enough free car parking” (10.1%). The results to these two questions are shown in Figures L and M below.

Figure L “Likes” about Shenfield District Centre

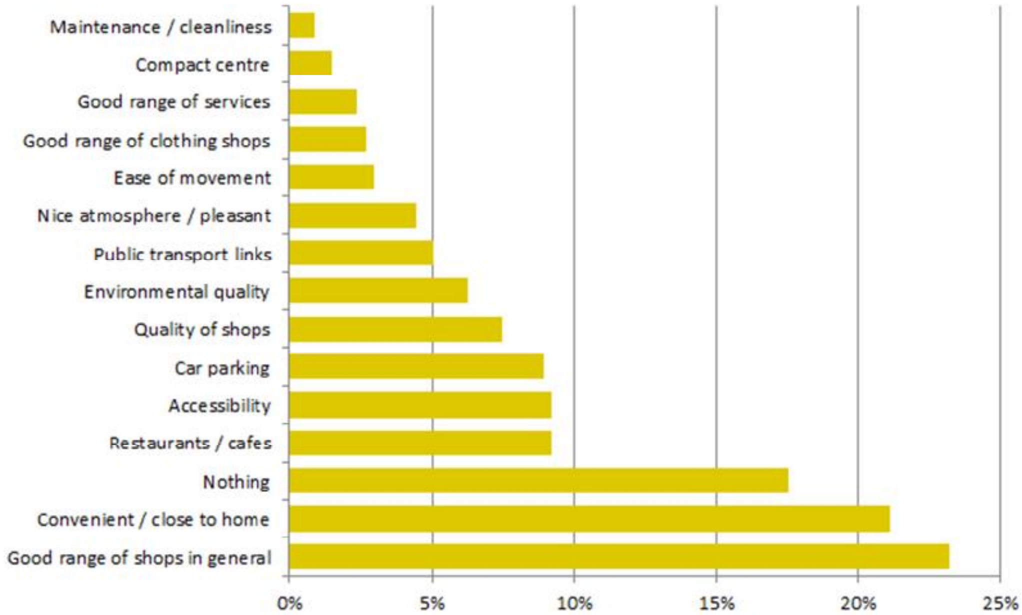
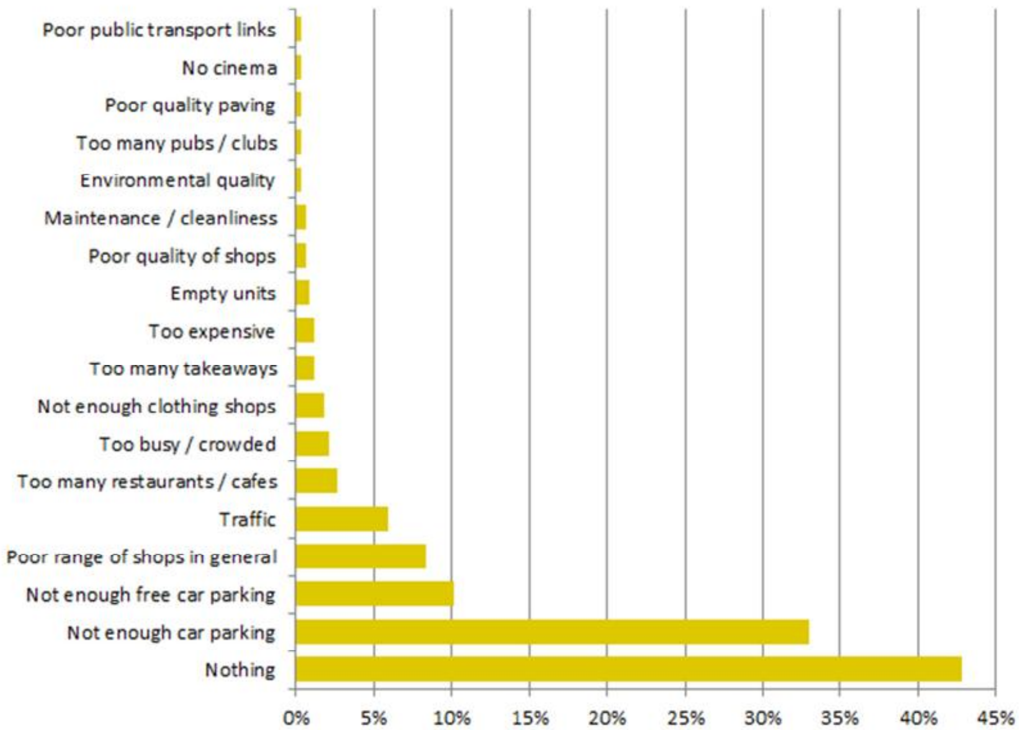


Figure M “Dislikes” about Shenfield District Centre



Source: NEMS Household Survey June 2014

Ingatestone District Centre: 15.9% of respondents stated that they regularly visit Ingatestone district centre to use shops or services. Of those who regularly visit the centre, 13.4% responded that they liked "nothing" about the district centre. 25.2% stated that they liked the environmental quality of the centre, and 23.6% responded that there was a good range of shops in general. Its convenient/close to home location was mentioned by 16.5%, and 14.2% stated that the quality of shops was good and there is a nice atmosphere. In response to questions about what people disliked about Ingatestone district centre, the most popular responses were "nothing" (70.9%), followed by "not enough car parking" (13.4%). The results to these two questions are shown in Figures N and O below.

Figure N "Likes" about Ingatestone District Centre

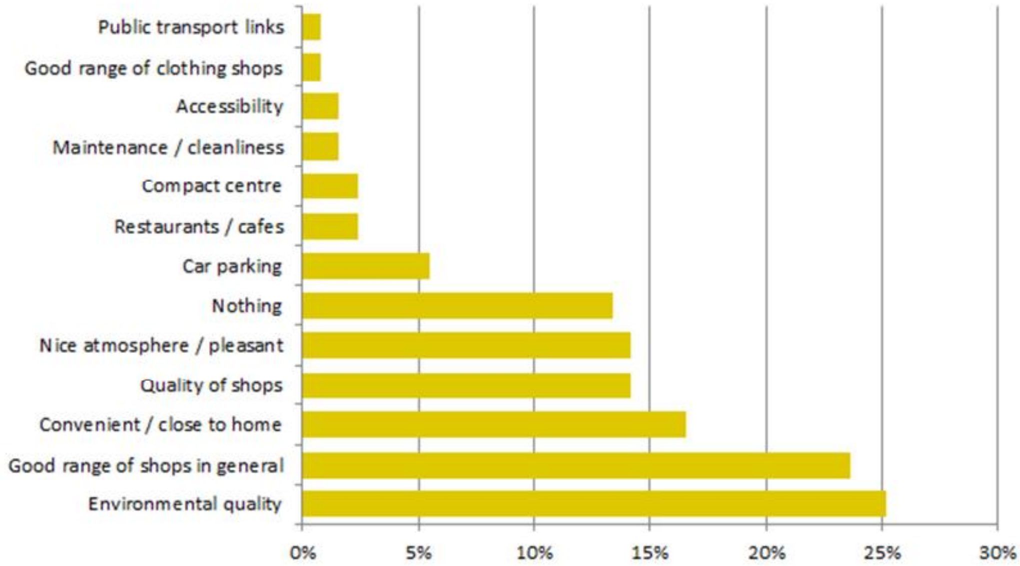
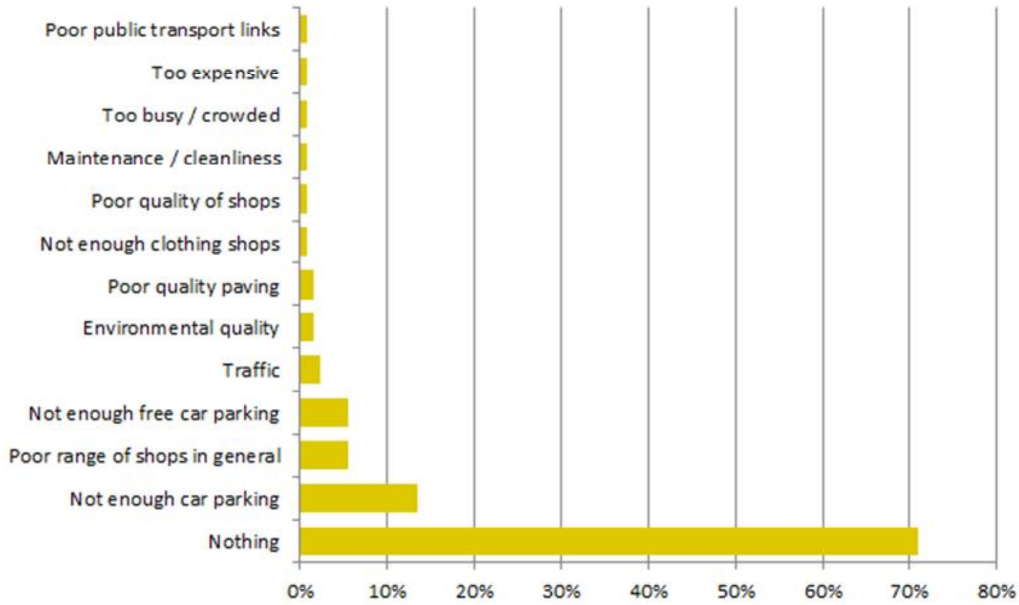


Figure O "Dislikes" about Ingatestone District Centre



Source: NEMS Household Survey June 2014

Warley Hill District Centre: 14.9% of respondents stated that they regularly visit Warley Hill district centre to use shops or services. Of those who regularly visit the centre, 29.4% responded that they liked “nothing” about the district centre. 23.5% responded that they liked the fact that the centre was convenient/close to home. Other factors that respondents liked included a good range of shops in general (17.6%) and its accessibility (13.4%). In response to questions about what people disliked about Warley Hill district centre, the most popular responses were “nothing” (58.8%), followed by “not enough car parking” (11.8%). The results to these two questions are shown in Figures P and Q below.

Figure P “Likes” about Warley Hill District Centre

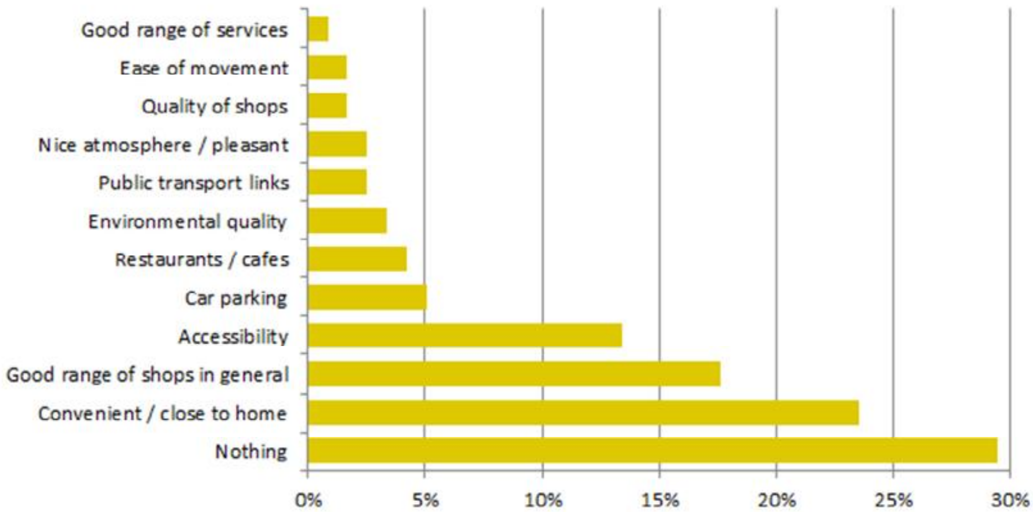
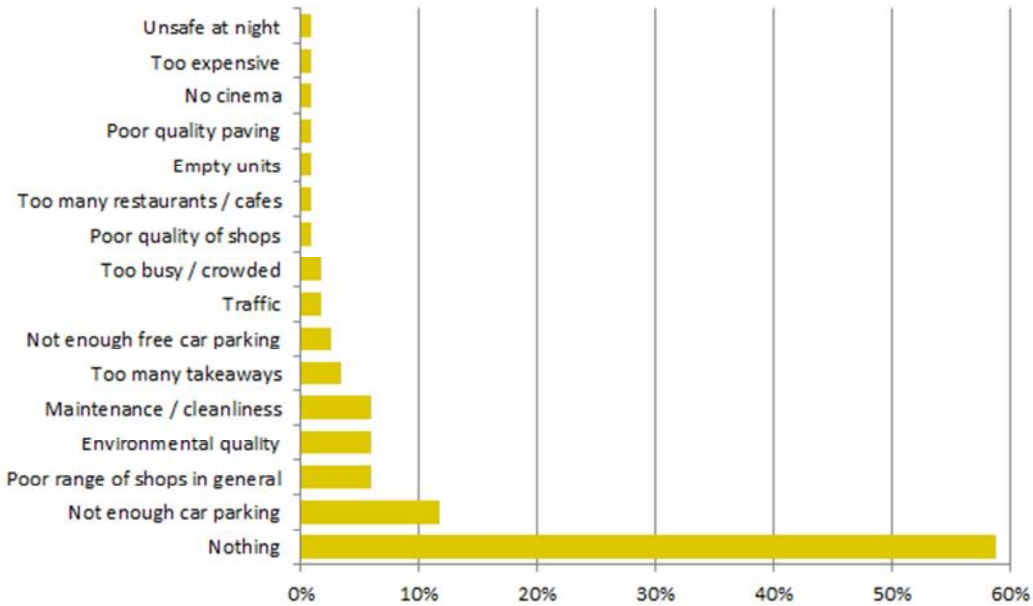


Figure Q “Dislikes” about Warley Hill District Centre



Source: NEMS Household Survey June 2014

Leisure Activities

The household survey asked respondents what leisure activities they or their family participate in in their spare time. The figures below show the most popular destinations, for those who responded that they partook in the various leisure activities.

Figure R Visits to Cinemas

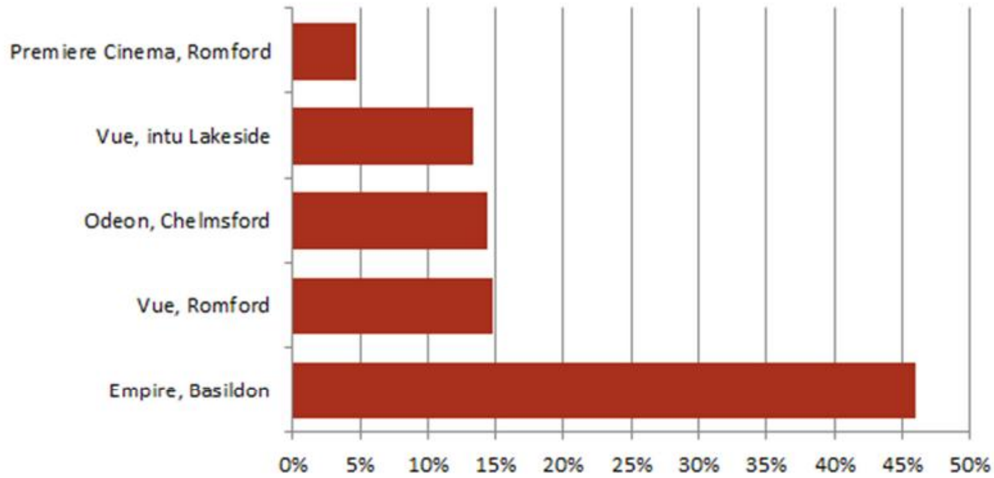
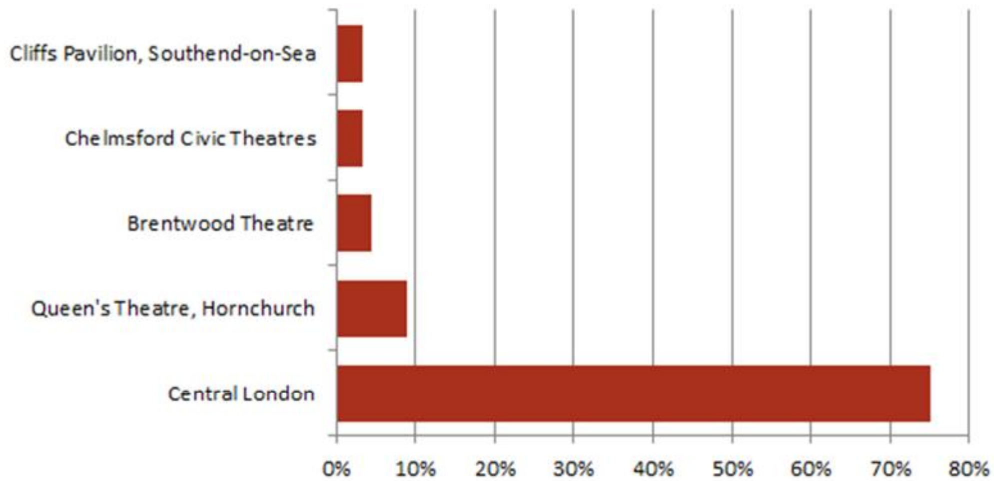


Figure S Visits to Theatre



Source: NEMS Household Survey June 2014

Figure T Visits to Pubs/Bars

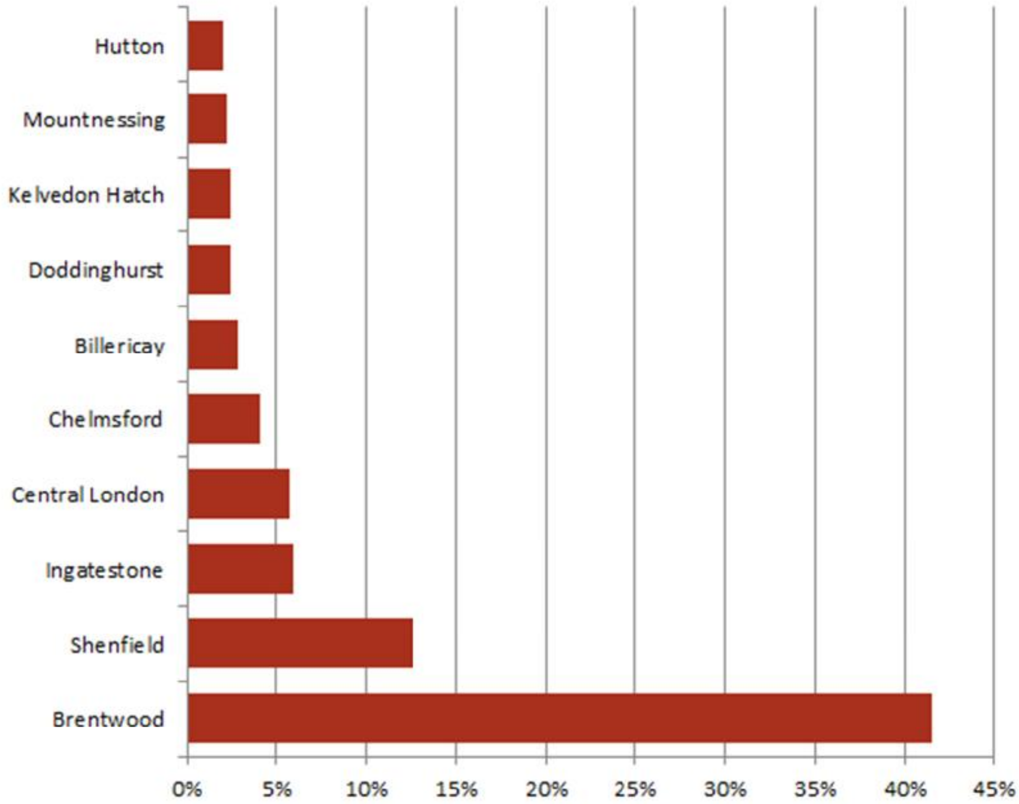
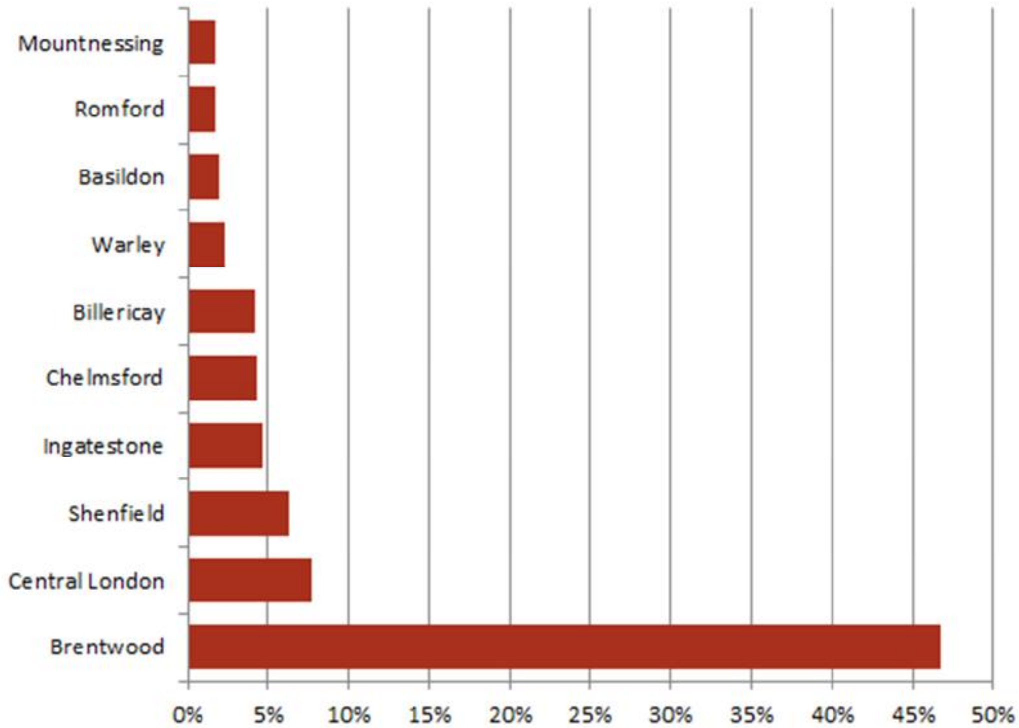


Figure U Visits to Restaurants



Source: NEMS Household Survey June 2014

Figure V Visits to Nightclubs

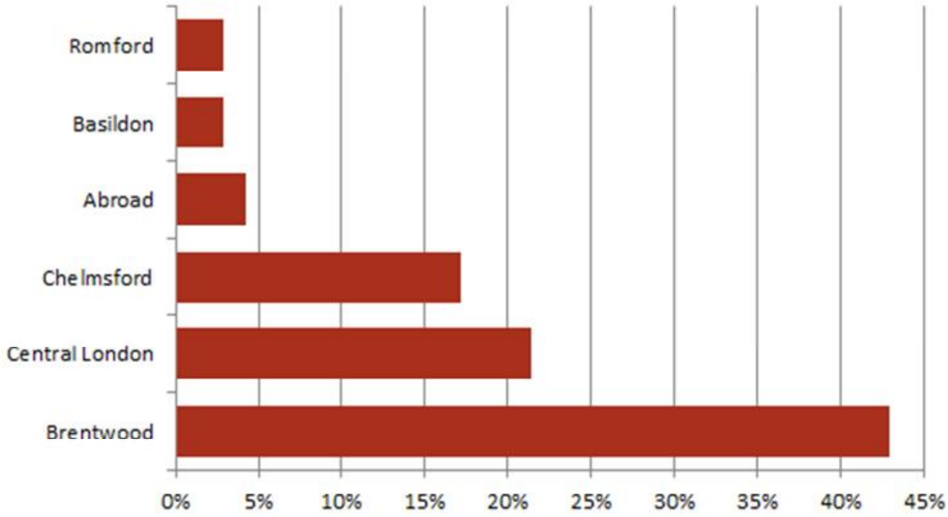


Figure W Visits to Bingo

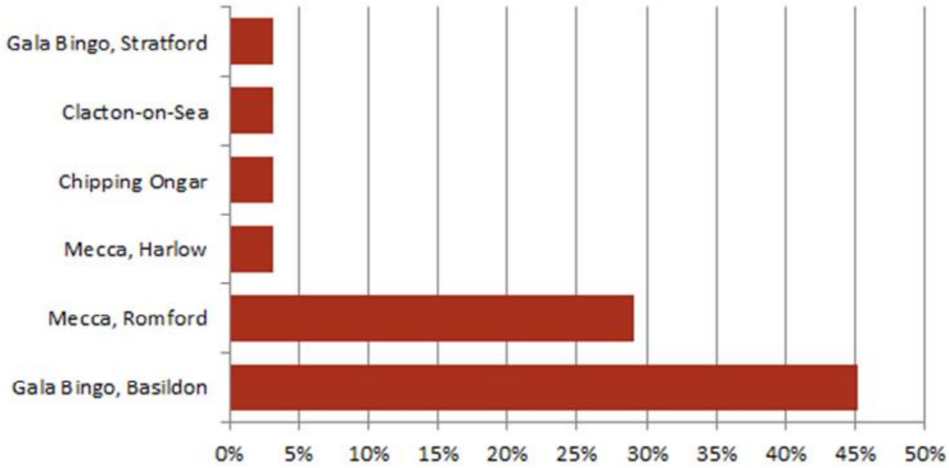
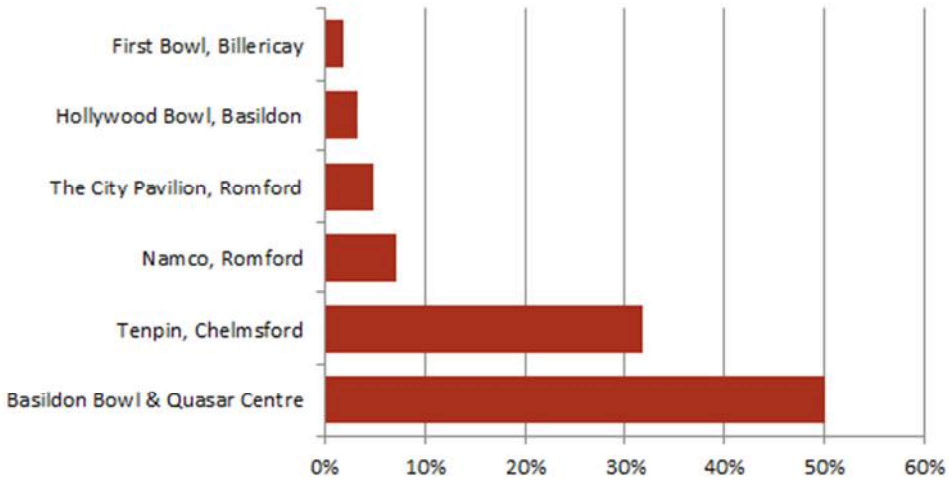
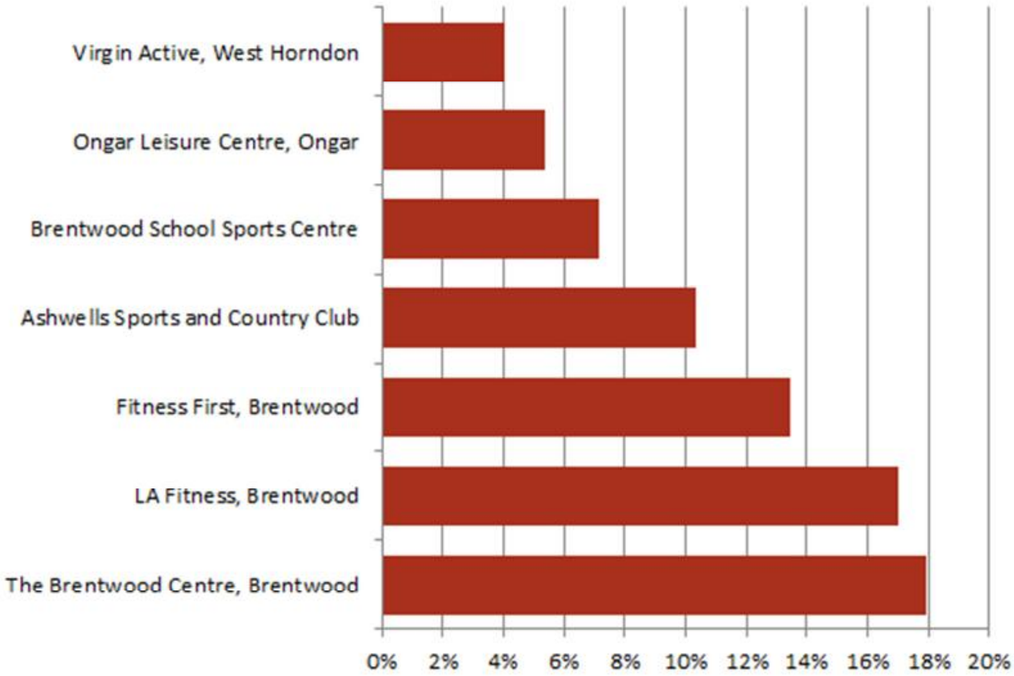


Figure X Visits to Ten Pin Bowling



Source: NEMS Household Survey June 2014

Figure Y Visits to Healthclubs/Gyms



Source: NEMS Household Survey June 2014

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