Uttlesford Retail Capacity Study
Updated March 2014

On Behalf of Uttlesford District Council

Draft

7 April 2014

Savills (UK) Limited
Embassy House
Queens Avenue
Bristol
BS8 1SB

CONTENTS

APPENDICES

1. Detailed Town Centre Appraisals & Health Checks
    a. Saffron Walden
    b. Great Dunmow
    c. Thaxted
    d. Stansted Mountfitchet
2. Report Plans detailing:
    a. 4 Zone Study Area
    b. 7 Zone Study Area
    c. Main Foodstores
    d. Main Centres
    e. Major Competing Centres by Floorspace
    f. Retail Warehouses
    g. Major Centre Floorspace Breakdown Schedule
3. NEMS Survey Results including
    a. Convenience Expenditure Flow Tables
    b. Comparison Expenditure Flow Tables
    c. Survey Questionnaire (short version)
    d. NEMS Survey Results – Shopping Patterns and Behaviour
4. Bus Services Schedule and Plans
5. Town and District Centre Plans including town centre boundary.
6. Quantitative Capacity Assessment
    a. Convenience Assessment
    b. Comparison Assessment including Retail Warehousing Assessment
7. Minutes of Meetings with:
    a. Saffron Walden Business Forum
    b. Great Dunmow Chamber of Trade
    c. Retail Agents
8. FOCUS Retail Requirements

1.0 INTRODUCTION

1.1 A Retail Capacity Study was prepared in 2010 for Uttlesford District Council and we are now instructed to update that earlier Report. Much of what was contained in the 2010 Study has remained unchanged, it being considered that that material continues to provide a reliable basis for the analysis and assessment of retailing provision in the district. However, there are key areas demanding modification which can be summarised as follows:

- Review of the Planning Policy context;
- Key health checks of the main centres;
- Update of the retail facilities both within the main towns of the Borough and surrounding towns;
- Review of the population and retail expenditure data underpinning the capacity exercises and carrying the data horizon through to 2031.

1.2 The purpose of the Study is to examine the existing shopping patterns in the area, the nature and content of the shopping facilities within the district and the need for additional facilities, if any, over the period until 2031. In order to fully appreciate shopping behaviour, a broad appraisal was also made of the major retail facilities beyond the district since it was evident that significant proportions of convenience and, in particular, comparison expenditure, was being attracted to those facilities. An important objective of the Study is to assess whether, for sustainable and other planning reasons, the existing patterns should be modified and, if so, to determine the consequences in terms of additional retail floorspace within the defined centres. We have been instructed to look particularly at the main centres of Saffron Walden and Great Dunmow and to a lesser extent Stansted Mountfitchet and Thaxted.

1.3 The Updated Study will provide an evidence base for the emerging Local Plan for the district concerning retail matters. To assist that process the Study will provide assessments at 2016, 2021, 2026 and 2031. The Council has asked that the Study embraces an appraisal of the policy options. Should the Study indicate a need for a significant increase in retail floorspace over the plan period, consideration as to where such facilities might be provided will also need to be examined given that both Saffron Walden and Great Dunmow are historic centres hemmed in by existing development. That exercise will examine the nature of the retail floorspace requirements and how it might be accommodated, and give consideration to the general locations which might be employed to give effect to those options. It does not examine specific site solutions.

1.4 The report structure has been framed to provide a logical sequence of inputs to the Study to ensure that all the relevant considerations have been taken into account in evaluating and reaching conclusions on the retail need. We have had particular regarding to the advice contained in the National Planning Policy Framework (NPPF), the recently published National Planning Practice Guidance – Planning for Town Centres - the emerging Local Plan for the District and the Practice Guidance for Town Centres issued in association with PPS4 which is still extant, even though the policy document itself has been withdrawn. These policy documents are summarised in Section 2.

1.5 The Study Area and Retail Zones employed in the Study are explained in **Section 3** to include the interrelationship with the telephone household survey which was conducted by North East Market Surveys (NEMS).

1.6 **Section 4** contains a comprehensive analysis of the retail expenditure flows running through the area and beyond as revealed by the household survey. In conjunction with other questions related to consumer behaviour and the information feeding in from our appraisals of the various levels and types of shopping facilities, this section provides an understanding of why people shop where they do and provides the basis for assessing any desirable changes to those patterns.

1.7 There are a number of other factors influencing retail movements – rates of expenditure and their year on year growth, floorspace efficiency ratios and Special Forms of Trading (SFT) which is the phenomenon of purchases undertaken outside of shops, e.g. TV purchases, on line sales, and these are examined in **Section 5**. The inputs rely upon published data from recognised economic forecasters, in this instance Pitney Bowes Business Insight and Oxford Economics.

1.8 **Section 6** looks at the need for additional floorspace. The assessment of convenience floorspace looks firstly at need based upon the continuation of the existing pattern but then goes on to consider the implications of introducing sustainable retail planning objectives to underpin future requirements. In relation to comparison floorspace the study examines requirements based upon an extension of the existing patterns of shopping.

1.9 The final **Section 7** broadly considers the implications of the quantitative and qualitative retail exercise for Saffron Walden and Great Dunmow and the nature and scale of facilities to meet future requirements. Initial conclusions are reached as to the practicality of accommodating such floorspace within or outside the centres. **Section 8** refers to the need to regularly monitor the study.

1.10 The Retail Study is accompanied by an extensive set of appendices set down on the contents page which will be cross referenced with the text.

2.0 THE POLICY FRAMEWORK

2.1 The capacity assessment is heavily influenced by the policy backcloth in that the need for different types of retail floorspace and their location are conditioned by the planning, retail planning and sustainable objectives of the various policy documents. There have been marked changes in the policy backcloth since 2010 although not necessarily the direction of travel.

National Planning Policy Framework (NPPF)

2.2 The Framework was published in March 2012 and is the principle Government planning policy guidance. It replaces the majority of the Planning Policy Guidance notes.

2.3 Paragraph 6 of the Framework refers to the purpose of the planning system to contribute to the achievement of sustainable development and this is a continuing theme throughout the whole of the document. Paragraph 7 refers to three dimensions to sustainable development – economic, social and environmental – which collectively seeks to provide wide ranging and appropriate facilities and services to the community so as not to prejudice the environment. The implications for plan making in paragraph 14 is that local planning authorities should positively seek opportunities to meet the development meets of their area and also meet objectively assessed needs with sufficient flexibility to adapt to rapid change.

2.4 Section 1 advises upon Building a Strong and Competitive Economy. Paragraph 19 recalls that the Government is committed to ensuring that the planning system does everything it can to support sustainable economic growth. It continues in paragraph 21 towards support for existing business sectors and plan for new and emerging sectors likely to locate in an area.

2.5 Section 2 is entitled Ensuring the Viability of Town Centres. Paragraph 23 advises planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres. It continues by stating that planning authorities should, inter-alia, recognise that town centres are the heart of communities and pursuit policies to support their viability and vitality. The town centres should be competitive, provide customer choice and a diverse retail offer.

2.6 Where suitable and viable town centre sites are not available for town centre uses, appropriate edge-of-centre sites should be identified well connected to the centre. In the absence of edge-of-centre sites policies should be set for meeting retail needs in other accessible locations well connected to the town centre.

2.7 Planning applications for retail developments are subject to a sequential test with priority being given to town centre sites before edge-of-centre, or finally, out-of-centre. The latter opportunities should have good access to the town centre

2.8 Section 4 is Promoting Sustainable Transport. Paragraph 29 notes that transport policies have an important role to play in facilitating sustainable development. Choice of mode of travel is an important objective but the Government recognises that urban and rural communities require different policies and measures.

2.9 The reduction of greenhouse gases is considered in paragraph 30 and Local Plans should support a pattern of development which, where reasonable to do so, facilitates the use of sustainable modes of transport. Paragraph 34 continues the theme by advising that plans should ensure that developments that generate significant movements are located where the need to travel is minimised. Paragraph 37 states that plans should aim for a balance of land uses so that people can be encouraged to minimise journey lengths for, inter-alia, shopping.

2.10 The section Local Plans notes that such plans are key to delivering sustainable development. Amongst the priorities identified in paragraph 156 is the strategic priority to deliver the provisions of retail developments.

2.11 Under the heading Using a Proportionate Evidence Base, the Framework advises in paragraph 161 that the evidence base should be used to assess the need for economic development, including both the qualitative and quantitative needs for all foreseeable types of activity over the plan period including retail development. This should include consideration of the role and function of town centres and the relationship between them.

National Planning Practice Guidance (NPPG)

Ensuring the Vitality of Town Centres

2.12 In March 2014 the final version of this document was published which sets out Government policy towards ensuring the vitality of town centres.

2.13 The Guidance sets down the key elements of policy to achieve such objectives and continues with an appreciation of how such policies should be employed in both plan making and decision taking. We consider the relevance for this report is the advice relating to plan making.

2.14 The Guidance commences with a short review of the NPPF relating to planning of town centres. It draws attention to the need to promote town centres, beneficial competition within and between centres and to create an attractive environment for living, working and visiting. Local authorities should assess and plan to meet the needs of main town centres uses in full, adapting a 'town centre first' approach. The amount and quality of parking is seen as an important consideration in contributing to the vitality of town centres.

2.15 The NPPF sets two key tests which should be applied when planning for town centre uses, which are not in an existing town centre, namely the Sequential Test and the Impact Test. They are relevant for determining individual applications and maybe useful in informing the preparation of Local Plans.

2.16 The Sequential Test should be considered first as this may identify that there are preferable sites in the town centres for accommodating main town centres uses and, therefore, avoid the need to undertake an Impact Test. The Sequential Test will identify development that cannot be located in town centres and which would then be subject to the Impact Test.

The Importance of a Strategic Vision for Town Centres

2.17 The Guidance advocates a positive vision or strategy for town centres, articulated through the Local Plan; it is key to ensuring a successful town centre enabling sustainable economic growth and a wide range of social and economic benefits.

The Content of a Town Centre Strategy

2.18 Further advice is provided upon the content of a town centre strategy, often expressed as a series of questions. What is the appropriate and realistic role, function and hierarchy of town centres and potential to accommodate new development. Such an assessment should cover three 5 year periods but also take into account the lifetime of the Plan. Where there is need for main town centre uses consideration should be given to expanding a centre or identifying redevelopment opportunities. It should involve evaluating different policy options, for example expanding the market share of a particular centre.

2.19 Strategy should identify changes in the hierarchy of centres including where a centre is in decline and policies to manage such circumstances.

2.20 Market signals are an important input in formulating plans for town centres.

Town Centre Health Indicators

2.21 The Guidance sets down a schedule of indicators that should be used to determine the health of town centres. They include diversity of uses, vacancy rates, retailer representation and the quality of the town centre management.

Town Centre Development Capacity

2.22 Where the required development cannot be accommodated in the town centre, the planning authority should plan positively to identify the most appropriate alternative strategy for meeting such needs. It should ensure that any proposed main town centre uses which are not in an existing centre are in the best location to support the vitality and vibrancy of the centre and that no likely significant adverse impacts upon that centre will arise.

2.23 Tourism is seen as an important element of the Local Plan including examining its economic implications.

The Sequential Test

2.24 The use of the Sequential Test in plan making requires a thorough assessment of the suitability, viability and availability for main town centre uses and clearly explained reasons if more central opportunities for locating such uses are rejected.

2.25 The Guidance provides a checklist of matters that should be considered when taking a sequential approach to plan making. The checklist of matters to be considered when taking a sequential test approach to plan making includes:-

- Has the need for main town centre uses been assessed to include future need?
- Can the identified need be met on town centre sites?
- If the additional main town centre uses cannot be accommodated on town centre sites, what are the next sequentially preferable sites?

2.26 The Guidance recognises that certain main town centres uses have particular market and locational requirements, which mean they may only be accommodated in specific locations. Robust justification must be provided where this is the case.

2.27 It is accepted that the 'town centre first' approach may well lead to the promotion of more expensive, complicated and unviable solutions than building elsewhere and planning authorities need to be realistic and flexible in terms of their expectations.

The Impact Test in Plan Making

2.28 The Impact Test becomes relevant when determining whether proposals in certain locations outside town centres would impact upon existing committed and planned public and private investment or on the role of a centre.

The Emergent Core Strategy

2.29 The first draft of the Core Strategy went through its consultation process in 2012 and the Council has supplied us with the Final Draft Core Strategy and this section summarises its retail policies and proposals.

Retail Policies

<u>**Introduction**</u>

2.30 The strategy proposed to be adopted by the Council is one of providing a broad range of retail and other facilities in the town centres in order to minimise travel to more distant centres. This objective has to be achieved whilst preserving and enhancing the historic nature of the local town centres in order to maintain their attraction.

2.31 The two main centres in the District are Saffron Walden and Great Dunmow. The former is the largest with a wide range of comparison and service shops and with the benefit of a town centre Waitrose supermarket. A Tesco store is located outside but close to the centre. There is a Homebase store and a Ridgeons builder's merchants on the edge of the town.

2.32 Great Dunmow has a far more limited range of shops and services, including a small Co-op store in the town centre. There is an out-of-centre Tesco supermarket.

2.33 Stanstead Mountfitchet is a far smaller centre, having a few comparison shops, but a Tesco Express and small Co-op store. Its close proximity to Bishops Stortford leads to a substantial exodus of expenditure to that centre. Thaxted village has a small range of shops, a number related to the tourist trade.

2.34 The large centres within reasonable travel distance of Uttlesford – Cambridge, Bishops Stortford and Chelmsford – and to a lesser extent Haverhill and Braintree, offer a far wider range of shopping facilities and attract a large proportion of expenditure away from the local area.

Saffron Walden

2.35 The centre exhibits good economic health. It comprises a relatively wide range of comparison shops and there is interest from both retailers and shoppers for expanded and improved facilities. Considerable additional floorspace is required over the plan period.

2.36 Additional supermarket representation is needed, either in the form of a main supermarket trader or a discounter. Local provision would assist in keeping expenditure in the area.

2.37 There is a requirement for an additional retail warehouse provision over the plan period.

Great Dunmow

2.38 It is considered unlikely that there is a need for any significant additional comparison floorspace in the town centre. In the longer term there is justification for a major supermarket facility.

Stansted Mountfitchet

2.39 Most expenditure in the area finds its way into Bishops Stortford but there is a requirement for a new small store to meet mainly day-to-day convenience needs.

Policy SP5 Retail Strategy

2.40 The Policy is directed to encouraging additional shopping floorspace and leisure facilities into the town centres. The scale of development will need to be consistent with a hierarchy where Saffron Walden and Great Dunmow are the principle centres and Stanstead Mountfitchet and Thaxted are local centres.

2.41 Tourism is seen as an important economic activity which supports town centre development and activities.

2.42 Policy RET3 provides for a flexible approach towards the provision of convenience retail facilities in rural villages.

3.0 STUDY AREA AND RETAIL ZONES

3.1 For the purposes of assessing the retail needs of the Uttlesford area a wide ranging household survey was undertaken by NEMS to gauge existing flows of different types of shopping expenditure, why they took place and the likelihood of change as part of meeting future requirements. The analysis of the nature and location of the shopping facilities assisted in the consideration of this study. A key consideration in securing a full appreciation of these factors as they bear upon the local shopping facilities at Uttlesford is to define a Study Area which embraces all, or most, of the shopping patterns generated by these centres. In undertaking this exercise regard was had to the advice contained in Appendix B of the Practice Guidance which is concerned with the appropriate definition of the Study Area.

The Uttlesford Area

3.2 Appendix 1 summarises the main content of shopping facilities both within Uttlesford and over the wider sub-region. It comprises a number of plans showing the location of the shopping centres including the main supermarkets, convenience and comparison floorspace and the main retail warehouse facilities. A schedule is also included which summarises the floorspace of various centres.

Convenience Shopping

3.3 All the main centres have major supermarket representation - Saffron Walden (2), Great Dunmow (1), Bishops Stortford (5), Cambridge (5), Chelmsford (5) and Harlow (5).

3.4 It is an accepted phenomenon of convenience shopping, and one referred to in the Practice Guidance (Appendix B), that customers will generally gravitate to facilities closest to home to meet their main food shopping needs and do so more intensively if there are a range of supermarkets in a particular centre providing increased choice. However, long distance "irrational" trips take place either because of the desire to shop at a particular retailer, perhaps in association with employment in the area, or other regular visits for another purpose. By far the greater proportion of such expenditure, however, would be drawn from the immediate catchment zone.

3.5 The major supermarkets identified above and the review of likely expenditure patterns, suggest that Uttlesford would be largely served by the facilities in Saffron Walden, Great Dunmow and beyond the district to the immediate south-west Bishops Stortford / Harlow. Chelmsford would be expected to attract expenditure from the south-east of the district, and Cambridge from the north and west via the M11 motorway link.

Comparison Shopping

3.6 It is apparent from the preliminary review of the shopping facilities that the Uttlesford area is dominated by the major comparison centres of Cambridge, Chelmsford and Bishops Stortford which lie outside the study area. These centres have a wide representation of national traders and include a number of large retail warehouse parks.

3.7 Saffron Walden is a much smaller centre with a reasonably wide representation of comparison traders, most of which are independent. Great Dunmow is considerably smaller with a limited range of comparison outlets, mainly independent traders.

3.8 The location of these facilities and their shopping characteristics led us to conclude that the main centres were likely to extend their sphere of influence over much of the district with the sub-regional centre of Cambridge drawing from across the whole of the area. The adjoining centres of Chelmsford and Harlow will also have a significant bearing on the shopping patterns. Within this trading framework Saffron Walden was likely to attract lower order sales from its immediate catchment area and its wide rural hinterland.

The Study Area and Catchment Zones Defined

3.9 The analyses of the previous section were used to begin to plot the extent of the Study Area, the main purpose of which was to ensure that the catchment areas of the main towns of Saffron Walden and Great Dunmow were largely embraced by those boundaries. Subsequent retail assessments could then be undertaken in the knowledge that practically all expenditure flows had been captured. The Study Area Plans are shown in Appendix 2a and Appendix 2b.

Convenience Expenditure

3.10 Given the strong tendency for main food shopping to gravitate to the nearest large supermarket facilities, catchment zones were constructed based upon journey time isochrones relating to main foodstores situated within and immediately adjoining the district. These primarily focused on the towns of Saffron Walden, Great Dunmow, Bishops Stortford / Harlow, Cambridge and Chelmsford.

3.11 However, two recent surveys indicated that main food trade was also being drawn into the Saffron Walden area from north of Zone 1. Indigo Planning had undertaken a district wide assessment of such expenditure flows as part of their evidence supporting a Sainsbury's supermarket proposal in Saffron Walden which showed that a significant amount of trade was being attracted into the area from outside the Study Area, and by inference, from the north. A household survey conducted by G L Hearn in support of a proposal to extend the Tesco supermarket in Saffron Walden revealed a similar picture. A more accurate indication of trade draw is revealed by a street survey of shoppers in central Saffron Walden by Indigo Planning which shows that significant custom is drawn into the town from the north. In the light of these considerations and the results of the Savills in-house shopping model for Saffron Walden, the Study Area employed in the household survey underpinning this Study embraced a further area to the north of Zone 1, considered to account for all or the greater part of the balance of main food expenditure entering the Study Area. That became Zone 4.

3.12 The household survey undertaken by NEMS (see Appendix 3a) confirms these anticipated expenditure patterns. Section 4 of this Study and related appendices show that within the particular zones, a substantial proportion of potential expenditure is captured by those nearby facilities but falls away very rapidly beyond. This pattern can be graphically demonstrated using the Combined Main Food data:-

Zone	**Retained Main Food Expenditure by Main Supermarkets %**	**Retained Main Food Expenditure by Other Convenience Stores %**
Zone 1	72	1
Zone 2	51	6
Zone 3	80	0

3.13 The survey results also demonstrate that a significant proportion of main food convenience expenditure – some 17% - is attracted into the Saffron Walden supermarkets from the area to the immediate north of Zone 1 (Zone 4 and the identical Zone A). These survey zones are shown in Appendix 2a and 2b.

3.14 The surveys confirms in our view that the Study Area – embracing all four zones takes into account virtually all the main food expenditure flows affecting the main towns in the district. However, Zone 4 reveals a more complex pattern of expenditure movements with the trade flowing into Cambridge (30%), Haverhill (28%), Saffron Walden (17%) and Harlow (3%). Such patterns reflect the zone's location at the point of overlapping spheres of influence and without any stores within the Zone itself.

It is to be noted that the new Tesco store in Haverhill which opened in September 2009 did not register in the NEMS survey and it is assumed that it had not fully established its trading operation by the time of the survey some 5 months later. As a major facility we would expect it to exert an influence comparable to the Sainsbury's in Haverhill, with it attracting a large proportion of main food expenditure from Zone 4 and significant trade from Zone 1. These considerations are examined in more detail in Section 6, which defines the catchment areas for the purposes of assessing floorspace requirements.

3.15 The material provided by the 7 survey zones shown in Appendix 2B permits a more refined analysis of expenditure flows. These zones straddle the boundaries between the main zones 1 to 4 and their analysis serves to show whether the catchment zones defined to gauge future main food shopping requirements robustly reflect the core catchment areas of the supermarket facilities. The 7-zone information has not been used in the quantitative floorspace assessments.

Comparison Expenditure

3.16 Our earlier analyses suggest that much of the comparison expenditure in the Study Area leaks to Cambridge and, to a lesser extent, Bishops Stortford and Chelmsford, with more modest proportions of such sales being retained by the two local centres of Saffron Walden and Great Dunmow.

3.17 In contemplating the appropriate extent and configuration of the Study Area to be employed, assistance was obtained from Retail Vision a Savills model which plots the sphere of influence of shopping centres using a number of attraction indices. The model for Saffron Walden indicated that the centre was likely to attract comparison expenditure from a band along the northern boundary of the district within South Cambridgeshire as well as Zones 1, 2 and 3. Accordingly the Study Area employed for the purposes of the household survey resulted in an enlarged Zone 1 (comprising Zone 1 and Zone 4), Zones 2 and Zone 3. Within that territory it was considered the survey would lock onto most, if not all, of the comparison expenditure being drawn into the Uttlesford District's shopping facilities.

3.18 The subsequent survey conducted by NEMS confirmed that virtually all comparison expenditure finding its way into Saffron Walden and Great Dunmow was derived from the Study Area. The expenditure flows in Appendix 3b shows the following draw pattern of all non-food expenditure:-

Shopping Centre	Total % Draw
Saffron Walden Zone 1	12
Great Dunmow Zone 2	2.36

3.19 The Study Area Plan shown in Appendix 2a is, therefore, considered a reliable platform for assessing the comparison shopping requirements of the district.

<u>The Household Survey</u>

3.20 The household survey was undertaken by NEMS, a specialist survey company with substantial experience of conducting investigations of this nature.

<u>Methodology</u>

3.21 The purpose of the survey was to capture a representative sample of residents in and around the Uttlesford District Council area to assess their convenience and comparison goods shopping habits and, to some extent, their use of services. Respondents' demographic details were also captured.

3.22 A total of 750 telephone interviews were conducted between Thursday 13 May 2010 and Thursday 20 May 2010. Interviews were conducted using NEMS' in-house CATI (Computer Assisted Telephone Interviewing) unit. Respondents were contacted during the day and in the evening. All respondents were the main shopping householder, determined using a preliminary filter question.

3.23 A random sample of live interviews were listened in to and assessed by the company's CATI Team Leaders to verify that the quality of interviewing was being maintained.

3.24 Selection was done using random stratified sampling from all available telephone numbers within the defined survey area.

3.25 The survey area was segmented into the seven zones shown on the second table of the plan in Appendix 2b, focusing on the three main population centres of Saffron Walden, Great Dunmow and Bishops Stortford.

3.26 The sample selection was random within each zone to make it as representative as possible of the overall survey area and each individual zone. To achieve appropriate population weightings the area surveyed was segmented into three primary survey zones, which were defined using postcodes. The zones were not sampled in proportion to the population within those zones and as such it was necessary to apply weightings to give appropriate weight to the responses from each of the four zones, in other words to make the responses representative of the population of the total survey zone. Where a zone had more interviews as a proportion of the total interviews done than it had proportion of the population, it was necessary to decrease the value of each interview. The inverse is also true.

3.27 Expenditure weightings were also employed in order to chart what percentage of the total expenditure each location was pulling away from the survey area, a first necessary step being to know how much money was being spent by the residents of the survey area.

3.28 By grossing the mean spend per household for each type of shopping carried out up to the number of households in the survey area, it was possible to chart the overall spend on each type of convenience and comparison shopping by all the households in each zone. Using these figures the overall spends could then be calculated for the survey area and percentages generated.

3.29 For convenience shopping the mean spend was calculated from each respondent's actual spend. For comparison shopping the mean spend was the mean spend from the general household survey conducted by the Office of National Statistics. The survey was constructed to ensure statistical reliability.

3.30 As with any data collection, where a sample is being drawn to represent a population, there is potentially a difference between the response from the sample and the true situation in the population as a whole. Many steps have been taken to help minimise this difference (e.g. random sample selection, questionnaire construction, etc.) but there is always potentially a difference between the sample of population - this is known as the "standard error". With a total sample of 750 interviews the survey results would normally be regarded as robust enough to allow sufficient investigation into typical subsamples, with a 95% confidence interval of ±3.6%.

<u>The Questionnaire</u>

3.31 A copy of the Questionnaire is attached at **Appendix 3c**.

3.32 In broad terms the objective of the household survey is to determine the expenditure flows across the Study Area and thereby the sales of various types of merchandise going into particular centres / facilities and the reasons why shoppers behave in this way. The former information provides a platform for assessing future retail requirements by combining the outputs with other data relating to the status and content of the centre and possible changes thereto to reflect more efficient and sustainable retail structures.

3.33 To assist with the understanding of shopping behaviour, interviewees were specifically asked why they visited a particular retail facility for the purchase of convenience and comparison goods. The answers provide clues as to what drives customers to shop in the way they do and the extent to which quality of facility – as opposed to proximity – affects choice. Such information assists in assessing the extent to which patterns might change as a consequence of improvements to facilities.

3.34 Specific questions are directed to the use of Saffron Walden and Great Dunmow town centres and what improvements might encourage customers to use the facilities more often or intensively, or at all. The Questionnaire considers this issue in terms of two broad responses, whether improvements to the shopping content of the centre would promote greater use, e.g. more clothes and fashion shops, and / or if the infrastructure supporting the centre might be improved to provide a more attractive and user-friendly environment, e.g. better / more car parking and reduced congestion. In association with the town centre health check data, the outputs assist in resolving the issue as to whether the centre is capable of raising its profile relative to competing facilities.

3.35 Further socio-economic data has been collected by the survey relating to employment status and occupation, family size and car ownership. In association with other information drawn from the Council's District Profile: A Summary Profile of Uttlesford, published in February 2010, it feeds into growth rate considerations examined in Section 5 and an understanding of expenditure flows.

3.36 The results of the household survey are key to the quantitative and qualitative needs assessments conducted in Section 6. The public's perception of the deficiencies of particular facilities and how centres might be improved are important considerations in deciding whether additional floorspace is justified going beyond that emerging from the quantitative need exercise. It is particularly important in relation to the role of Saffron Walden as a comparison shopping facility.

4.0 THE EXISTING PATTERNS OF RETAIL SPENDING

4.1 Shopping patterns represent a highly complex aspect of human behaviour based upon many individual decisions, but broad patterns can be discerned from the household survey. Those patterns are clearly dependent upon the nature and location of shopping facilities serving the support population, but also the socio-economic profile of that population and the transportation infrastructure providing access to the centres. It is, therefore, relevant to appraise that context and possible changes which might alter the shopping behaviour.

The Character of the Area

4.2 The District of Uttlesford occupies the north-west sector of the County of Essex, flanked to the north by South Cambridgeshire District Council and to the west by East Herts District Council. The District of Braintree abuts the area to the east, and to the south lies Chelmsford Borough Council.

4.3 Except for the market towns of Saffron Walden and Great Dunmow, the area is mainly rural in character with an undulating, agricultural landscape dotted with villages, small hamlets and occasional individual houses. However, to the south it accommodates Stansted Airport, an extensive complex comprising the airport itself and support facilities. Saffron Walden (population 14,659 in 2007) dominates this structure in the northern part of the district (Zone 1) and the smaller town of Great Dunmow (population 8,007 in 2007) occupies a similar position in the south-east of the district (Zone 2). Zone 3 is situated to the west of the catchment area and is heavily influenced by facilities outside of the District due to its close proximity to Bishops Stortford and Harlow.

4.4 There are a number of larger villages with shopping facilities at Stansted Mountfitchet (population 5,883 in 2007), Felsted (population 4,735 in 2007), Thaxted (population 3,257 in 2007) and Newport (population 3,214 in 2007).

4.5 In addition to the main shopping facilities located within the District, Stansted Airport also has a considerable retail offer including retailers such as Clarkes Shoes, WH Smith, La Senza, Monsoon, Clare's Accessories and Accessorize. However, the household survey reveals no expenditure flows into the airport, shoppers probably being dissuaded by the relatively high parking costs. The centre would appear to operate as an independent retail offer based upon sales generated by airport passengers.

The Transportation Network

Highways

4.6 The rural nature of the area is reflected in its limited transportation infrastructure, particularly Zone 1 but accessibility improves as a consequence of the road network serving Bishops Stortford / Harlow, Cambridge and Chelmsford.

4.7 The M11 motorway runs north/south along the western flank of the district, junction 8 providing direct access into Bishops Stortford and junctions 9 and 9A to the north-west of the district linking with the B1383 and B184. The latter provides access to Saffron Walden some 7.5 km to the south-east. Saffron Walden is served by a radial network of B roads and minor roads across the whole of Zone 1. The B1052 and B1383 provide a fairly direct route into Bishops Stortford.

4.8 Great Dunmow is located off the A120 running between Bishops Stortford and Braintree to the east. It is a dual carriageway, primary route providing speedy access across Zones 2 and 3, and just south of Great Dunmow the A130 diverts south-east towards Chelmsford. The southern extremity of Zones 2 and 3 are crossed by the A1060 Bishops Stortford to Chelmsford road, the B183 providing a link to Harlow.

4.9 The south-western sector of the Study Area, Zone 3, encircles and abuts the north and east side of Bishops Stortford. The B1383 and B1051 give direct access to the ring road surrounding the town and the town centre.

4.10 Enquiries have been made of Essex County Highways to ascertain whether there have been any significant changes to this route network. They have advised not and there is therefore, no justification for disturbing the expenditure patterns revealed by the Household Survey.

4.11 Data from the household survey shows that over the whole of the Study Area, 89% of main food shopping customers travel by car to their normal supermarket (10% as passengers), Zone 2 showing the highest dependence at 93%. Predictably the more localised nature of top-up shopping gives rise to 50% of customers travelling by car, with those from Zone 1 at 42% being less reliant on the car and shoppers from Zone 3 being the most dependent at 63%.

4.12 As a measure of the use of the car for undertaking non-food shopping trips, some 71% of customers from the Study Area travel by car on trips to buy clothes, footwear and fashion goods. There are marked differences between zones and between expeditions for different types of comparison goods.

4.13 The use of taxis, motorcycles and bicycles for shopping trips collectively amount to less than 0.5% of shopping trips.

Public Transport

4.14 Reliance upon the bus for shopping trips is limited. Throughout the Study Area less than 2% of customers travel by this means for main food shopping: for clothing and fashion goods it is 10.7% (including minibus or coach).

Bus Services

4.15 The bus services provided within the District are considered important as they demonstrate the ability of those who are less mobile (young people, those without access to a car and the elderly) to move between centres within the District to other larger settlement beyond.

Saffron Walden

4.16 In addition to the bus services serving the town itself, Saffron Walden town centre also offers a number of services providing links to nearby settlements. The main services are summarised below.

4.17 The No. 5 Service provides hourly services between Bishops Stortford and Saffron Walden. The route includes stops at Debden, Thaxted, Broxted, Stansted Airport, Takeley and Hatfield Health. The service operates from the early morning until late evening Monday to Saturday. In addition to servicing the town centre, it also calls at the Tesco supermarket. A more limited service is operated on Sundays.

4.18 The Citi7 Service also provides a similar service as the above during peak hours Monday to Saturday between Saffron Walden and Cambridge via Little Chesterford, Great Chesterford, Sawston, Great Shelford and Addenbrookes, Again, this service, also operates from early morning to late evening and on a hourly basis. A more limited service is operated on Sundays.

4.19 The 301 Service offers a public transport link between Saffron Walden and Great Dunmow. The hourly service calls at Audley End, Newport, Widdington, Quendon, Stansted Mountfitchet, Birchanger and the Tesco supermarket. A more limited service is offered on Sundays.

4.20 In addition to the above routes, there are also a number of other less frequent services to various hamlets within the District and beyond which run every 2 hours on average during peak hours.

Great Dunmow

4.21 The main bus routes serving Great Dunmow is the 313 and 133 Service which calls at Duton Hill, Thaxted, Debden, Carver Barracks and Saffron Walden (313) and Braintree, Great Dunmow and Stansted Airport (133). In addition to these services, the 315 service offers a more localised service to the immediate surrounding villages. The 133 and 313 services runs hourly and two hourly respectively during peak times. The 42A Service between Stansted Airport and Chelmsford which calls at Great Dunmow also offers an hourly service to Chelmsford for the residents of Great Dunmow.

4.22 This is a relatively poor service for a centre the size of Great Dunmow. The services do not provide residents with a realistic alternative to the car and do not provide good transport links to other larger settlements outside the District.

Stansted Mountfitchet

4.23 The bus services within Stansted Mountfitchet are considered to be good for a centre of this size. During peak hours Monday to Saturday, the 301 bus provides a frequent service between Bishops Stortford and Saffron Walden calling at Stansted Mountfitchet. Services to other nearby centres are more limited.

4.24 For further information on the bus services, see **Appendix 4**.

Thaxted

4.25 The bus services within Thaxted are considered to be good for a centre of this size. During peak hours Monday to Saturday, there are hourly services linking Thaxted with Saffron Walden, Great Dunmow, Stansted airport and Bishops Stortford.

4.26 For further information on the bus services, see **Appendix 4**.

Railway

4.27 The London / Bishops Stortford / Cambridge railway runs along the western boundary of the Study Area. Within the study area, there are stations at Great Chesterford, Audley End, Newport, Elsenham, Stansted Mountfitchet, and Stansted Airport. These stations provide rail links to Cambridge to the north and Bishops Stortford, Harlow and London to the south.

4.28 The household survey barely registers this mode of travel for any type of shopping trip.

Walking

4.29 Given the nature of main food shopping, it is unsurprising that only 5% of shoppers in the Study Area used this mode of travel for their trip. Some 2% of expenditure for the purchase of clothes, footwear and fashion goods were undertaken on foot.

4.30 Walking is far more important for top-up shopping with 38% of those who undertake such trips employing this means of travel. There are significant differences between the zones – 41.2% in Zone 1 and 33.3% in Zone 3 – with car use correspondingly higher where travel on foot is least important.

The Retail Structure and Expenditure Flows

4.31 The detailed appraisal of the shopping centres is contained in **Appendix 1**, but in order to better understand the expenditure flows from the various parts of the Study Area to those centres, this section reviews the key elements of those facilities. For convenience shopping the analysis is conducted in terms of the catchment areas represented by Zones 1, 2, 3 and 4, but the review of comparison shopping is based upon the Study Area.

The Surrounding Shopping Centres outside the Study Area

4.32 Over the wider area the district is surrounded by major convenience and comparison shopping facilities which both serve to constrain the sphere of influence of the centres within the Study Area and attract expenditure away from local facilities. **Appendix 2c – 2g** contains plans and schedules illustrating the location and content of those centres.

Major Convenience Shopping Facilities

4.33 4The main centres of Cambridge, Bishops Stortford / Harlow and Chelmsford are all located within twenty minutes' drive time of that part of the Study Area closest to them and thus within reasonable travel time.

4.34 Bishops Stortford has five major supermarket outlets – Sainsbury's, Jackson Square [1,657 m2 sales], Sainsbury's, The Thorley Centre [2,315 m2 sales], Tesco, Lancaster Way [3,311 m2 sales], Waitrose, Northgate End [1,672 m2 sales] and Marks & Spencer [1,700 m2 sales]. The Tesco and Sainsbury's are located within the western suburbs of the town close to the ring road.

4.35 Chelmsford accommodates five major stores – Tesco, Springfield Road [3,032 m^2 sales], Asda, Chelmer Village [3,209 m^2 sales], Morrisons, North Melbourne [2,081 m^2 sales], Sainsbury's, White Hart Lane [5,600 m^2 sales] and Tesco, Princes Road [4,667 m^2 sales].

4.36 There are four large supermarkets in Cambridge – Asda, Coldhams Lane [3,716 m^2 sales], Sainsbury's, Brooks Road [4,265 m^2 sales], Tesco, Cheddars Lane [4,995 m^2 sales], and Waitrose, Trumpington [2,976 m^2 sales]. In addition to these, there are also a number of smaller stores including a Sainsbury's and M&S. Apart from the Waitrose, all the outlets are embedded in the suburbs of the city, away from the southern access points closest to the Study Area.

4.37 Large supermarkets are also situated in Royston – Tesco [3,956 m2 sales], Haverhill – Sainsbury's [4,621 m2 sales], Haverhill Tesco [3,948 m2 sales] and Braintree – Tesco Market Place [4,318 m2 sales]. In addition to the Tesco, Braintree also accommodates several smaller stores including Sainsbury's, Tofts Walk [2,485 m2 sales], Tesco, Great Notley [1,667 m2 sales] and Tesco, Coggelshall Road, [2,219 m2 sales].

4.38 Within Harlow there are a number of large supermarkets comprising of Asda, Watergardens, [6,725 m2 sales], Tesco, Edinburgh Way [3,840 m2 sales]. Sainsbury's, Fifth Avenue [4,748 m2 sales], Tesco, Charles Langley Centre, [3,434 m^2 sales] and Tesco, Harvey Centre [1,870 m^2 sales].

Major Comparison Shopping Facilities

4.39 It will be appreciated from **Appendix 2g** that the sub-regional shopping centre of Cambridge dominates the comparison shopping structure, with town centre sales floorspace devoted to such traders amounting to approximately 92,500 m2 sales. The centre has a very wide range of national retail outlets and multiples. The retail attraction of the city is supplemented by the Cambridge and Beehive Retail Parks collectively comprising approximately 28,000 m2.

4.40 Chelmsford and Bishops Stortford are smaller in scale with approximately 41,000 m2 sales and 19,000 m2 sales of comparison floorspace respectively, occupied by a comparatively wide representation of national traders. The Riverside Retail Park adds to the attraction of Chelmsford for comparison shopping.

4.41 London and the Lakeside Retail Park are long distance attractions but on a very substantial scale and exert influence over the Study Area.

Shopping Centres within the Study Area

Zone 1

<u>The Shopping Facilities</u>

<u>Saffron Walden</u>

4.42 The area is dominated by Saffron Walden, a market town located centrally to Zone 1. Its historic nature is reflected in an incoherent but nonetheless compact and attractive town centre where many of the retail units are housed in small premises, many Listed, the whole being embraced by a Conservation Area (see **Appendix 5**).

4.43 Saffron Walden contains a wide range of shopping floorspace and is summarised in the table below.

Category	Number of Outlets	Net Sales Floorspace m^2	Total Floorspace %
Convenience	14	2,313	12.8
Comparison	105	8,912	49.3
Service	62	5,693	31.5
Vacant	13	1,171	6.5
Totals	**194**	**18,089**	**100**

Source: GOAD Town Centre Report date Nov 09

Calculated by using a gross to net ratio of 75% to the GOAD floorspace figures.

4.44 The convenience provision is dominated by a Waitrose supermarket (1,527 m2 sales) together with other local / largely independent food shops for example Londis etc. Planning consent has been granted for an extension to the Waitrose Store which will increase the sales areas further by 431 m2. The comparison offer is extensive, but with only a limited representation of national retailers including Curry's, Digital, New Look, Laura Ashley, W H Smith, Boots, Monsoon and Clarks. A high proportion of comparison traders are fashion outlets. The independent traders account for the majority of the comparison goods shops.

4.45 Saffron Walden has an extensive service offer comprising banks, financial and other services, with a wide range of restaurants and public houses. The vacancy rate at the time of survey was 6.5% compared with a national average of 10.9%. Since the GOAD report was published, 2 large vacant units have been taken up (former Eden store and Woolworths). As a result, the vacancy rates have further reduced to approximately 4% (as of Feb 2010) which is significantly below the national average.

4.46 There is a street market selling a wide range of goods twice a week.

4.47 The centre is supported by five car parks, including one adjacent to the Waitrose supermarket, with a combined capacity of 873 spaces. Four of these car parks are pay and display.

4.48 Within the suburbs of Saffron Walden is a large Tesco supermarket of 2,330 m2 sales supported by a petrol filling station and 378 parking spaces. This has been granted planning permission for an extension which will increase its sales area. There is a large Homebase unit with a gross floor area of 1,267 m2 and a Ridgeons extending to some 2,100 m2. Planning permission (Reference: UTT/13/0268/FUL) has also been granted for a new discount foodstore and retail warehousing at Thaxted Road and this is under construction.

4.49 The detailed appraisal of the town centre is contained in **Appendix 1a**.

Newport

4.50 Newport is a large village situated on the B1383 between Saffron Walden and Stansted Mountfitchet. The village offers a number of retail units situated sporadically along the linear High Street. The retail offer includes a Four Seasons deli convenience store selling local fresh produce including meats and fresh fruit and vegetables, a small Costcutter convenience store, post office, pharmacy, Indian restaurant, petrol filling station, health and beauty shop, public house, barbers, home interiors, carpets shops and garden store

4.51 Although the centre would principally serve its immediate hinterland, there are some more specialised shops which may draw from a wider area such as the Deli, home interiors and carpet shops. The limited convenience offer would serve a grocery top up function only.

Expenditure Flows

4.52 The household survey provides information as to the flows of different types of expenditure into the existing shopping facilities and in doing so demonstrates the sphere of influence of the particular outlets and centres.

Combined Main Food Expenditure

4.53 By far the most important centre in Zone 1 is Saffron Walden, and close by to the south-west is the large village of Newport with a range of local facilities. **Appendix 3a** includes the Convenience Goods Expenditure Flows from Zone 1 and also Zones 2 and 3.

4.54 The table shows that the two Saffron Walden stores – Tesco and Waitrose – account for 38.58% and 33.59% respectively of combined Main Food expenditure from the zone. Thereafter the trade draw tails off dramatically, Tesco attracting 2.91% of the sales of Zone 2 and 1.09% of Zone 3: the corresponding figures for Waitrose are 4.04% and 1.09%. However, it is to be noted that the Tesco and Waitrose attract 8.49% and 8.17% respectively from Zone 4 to the immediate north.

4.55 The Sainsbury's, Haverhill supermarket lying on the edge of the zone attracts 4.89% of potential sales, and the Cambridge stores collectively account for 4.84% of the expenditure, of which Asda, Coldhams Lane, attracts 2.18%. We would expect the new Tesco store in Haverhill to attract trade from the zone.

4.56 Overall the Bishops Stortford stores account for 5.55% of purchases, the Sainsbury's in Jackson Square being the most important at 1.75%. Harlow attracts just over 1%, and the Tesco at Royston 1.69%. Local shops in Zone 1 account for less than 0.5% of such potential sales.

4.57 Zone 4 lies to the immediate north of Zone 1 and is clearly an area where, because of the distribution of supermarkets facilities, there is no dominant discernable main attractors for the type of shopping, save perhaps the Sainsbury's in Haverhill which accounts for 27.94% of expenditure from that Zone. For similar reasons the Tesco in Haverhill is likely to be a major attractor of trade.

4.58 Collectively the Cambridge stores draw 30.23% of such expenditure from the zone. The Tesco and Waitrose supermarkets attract 8.48 and 8.17% respectively. Some 13.26% of expenditure from the outside of Zone 1 is drawn from this zone.

4.59 A range of other stores outside Zone 1 represent 1.69% of expenditure, but Chelmsford attracts no custom. Internet and home delivery sales equate to 4.16% of purchases.

4.60 The more detailed area breakdown provided by the Seven Zone Survey Analysis throws further light upon the spheres of influence. Those lying within Zone 1 are Zones B, C and D and are shown on the plan in Appendix 2b.

4.61 Zone B is broadly centred on Saffron Walden and, as might be expected, the Tesco store at 45.8% and the Waitrose supermarket at 34.9% dominate combined main food sales. The Sainsbury's, Haverhill accounts for 2.6% of expenditure showing limited influence in Saffron Walden inner catchment area. The Bishops Stortford and Cambridge stores represent 2.6% and 3.0% respectively of the custom. The Tesco, Great Dunmow supermarket draws just 0.5% of sales from this zone.

4.62 Zone C spans Zones 1 and 3 in the western sector of the Study Area.

4.63 Given the locational circumstances, one might expect a break-even situation in terms of influence between Saffron Walden and Bishops Stortford, and that is borne out by the data. The Bishops Stortford supermarkets collectively attract 38.7% of trade from this zone – with the Tesco being most important at 17.1%, followed by the Sainsbury's at Jackson Square at 10.2% - whereas the Tesco and Waitrose supermarkets in Saffron Walden account for 36.4% of expenditure, both accounting for 18.2% of custom.

4.64 Collectively the Cambridge stores represent just over 2% of sales, and Harlow a similar draw. The Tesco in Great Dunmow attracts 2.3% of expenditure.

4.65 Zone D embraces the southern part of Zone 1 and the northern sector of Zone 2. Locationally one might expect the attraction between the zones to be roughly equal, but the data suggests otherwise. The dominating supermarkets in this area are the local Tesco in Great Dunmow accounting for 24.6% of expenditure, the Tesco in Saffron Walden representing 23.5% of sales and the Waitrose in the same town drawing 19.5% of sales. It is highly likely that this disparity is due to the presence of two major supermarkets in the one town, and one in the other.

4.66 The Sainsbury's in Haverhill exerts some influence, accounting for 3.9% of sales and interestingly the Sainsbury's in Brooks Road, Cambridge attracts 1.3% of sales, despite the presence of a large Sainsbury's fairly close by in Haverhill. Other factors, e.g. employment, may well be an influence. The Bishops Stortford supermarkets collectively attract 6.5% of custom, and a limited amount of trade is drawn to Chelmsford. The Braintree supermarkets account for 2.6% of expenditure.

Top-up Expenditure

4.67 It is to be noted that across the whole of the Study Area 26.5% of respondents' state that they do not undertake top-up shopping.

4.68 The convenience goods expenditure flows in **Appendix 3a** illustrates the flow of expenditure relating to small scale / top-up food and grocery purchases. It is apparent that this type of shopping gives rise to a more diffuse pattern of trips than for main food shopping.

4.69 Within Zone 1 there is still a comparatively high retention rate for this type of expenditure of 66.93% but other shops in Saffron Walden and within Zone 1 account for over 18% of these sales. The main supermarkets in Saffron Walden – Tesco and Waitrose – nonetheless remain important for this type of shopping, collectively accounting for 49.6% of expenditure.

4.70 Interestingly a large number of small amounts of expenditure from Zone 1 find their way into the main supermarkets in Great Dunmow, Bishops Stortford and, to a lesser extent, Cambridge. A significant 5.51% of expenditure takes place outside the survey area. Other influences other than proximity appear to be at work.

4.71 Internet and home delivery account for 3.15% of sales and 8.66% from outside of Zone 3.

Zone 2

The Shopping Facilities

Great Dunmow

4.72 Lying just north of the A120 Bishops Stortford to Braintree road is the historic market town of Great Dunmow. Its linear form is set by the spine of High Street between Market Place and Chelmsford Road. Much of the fabric is historic in nature, many of the buildings are Listed and the entire centre is within a Conservation Area. A plan of the centre is attached in **Appendix 5**.

4.73 The centre comprises the following mix of outlets:-

Category	**Number of Outlets**	**Net Sales Floorspace**	
		m^2	**%**
Convenience	9	1239	22.8
Comparison	34	2021	33.4
Service	49	2341	40.3
Vacant	4	207	3.6
Totals	**96**	**5808**	**100**

Source: Savills Town Centre Survey Feb 2010 & update 2011

4.74 Within the town centre is a small Co-op supermarket of 804 m2 sales and a small number of convenience outlets including a butcher, baker, newsagent, wine merchant and grocer. There are no national retailers. There is a weekly street market selling a range of food and non-food goods.

4.75 A large Tesco supermarket with associated petrol filling station and surface level car park provides a sales floor area of 2,330 m2 and is located on Bishops Stortford Road to the south-west of the town. It received planning permission in September 2013 for an extension comprising 1134 sq m net (663 sq m net comparison floorspace and 447 sq m net convenience floorspace).

4.76 The comparison offer in the town centre comprises a mix of mainly lower order outlets including, inter alia, pharmacies, furniture, jewellery shops, shoe shops, household goods / hardware stores and bookshops. There is very limited national retailer representation and most of the shops are independent traders. The town is an important leisure / service centre which is reflected in those facilities being by far the largest sector in floorspace terms.

4.77 There are four car parks supporting the centre, the largest of which is centrally located next to the Co-op supermarket, with a combined capacity of 285. They are subject to a pay and display charging regime.

4.78 The combined offer of the Tesco and town centre convenience shops suggests the town's primary function is to meet the convenience needs of the population of the catchment area. The range of comparison shopping is very limited and it is apparent that the town provides for day to day lower order needs with the great majority of expenditure leaking to more distant major centres.

4.79 The detailed appraisal of the centre is contained in **Appendix 1b**.

Thaxted

4.80 The village of Thaxted lies midway between Saffron Walden and Great Dunmow and consists of 24 retail units of which 5 are convenience traders including a Nisa convenience store of 170 m2 sales and 8 comparison outlets. The high proportion of service outlets – 11 – representing 49% of the overall floorspace reflects the tourism focus of the village as a historic centre.

4.81 The detailed appraisal of the centre is contained in **Appendix 1c**.

Expenditure Flows

Combined Main Food Expenditure

4.82 Central to this zone is the market town of Great Dunmow and further to the north, on the boundary between Zones 1 and 2, is the village of Thaxted with a limited range of retail outlets. The Tesco supermarket on the edge of Great Dunmow dominates the shopping patterns, accounting for 51.44% of expenditure from the zone, with the Co-op barely registering at 3.26% of sales. The main supermarkets in Saffron Walden draw 6.95% of expenditure, the Waitrose being the most important at 4.04%.

4.83 Whilst some distance from Bishops Stortford, Braintree and Chelmsford, the stores in these towns exert a considerable influence on shopping patterns, in all probability because of the good road access corridor of the A120 and A130, combined with just the single store facility in the town. The Bishops Stortford supermarkets account for 13.02% of expenditure, the Sainsbury's in Jackson Square at 4.82% and the Waitrose, Northgate End, at 4.43% being the most influential. The Chelmsford stores account for 7.7% of expenditure, the Sainsbury's outlet representing 4.86% whilst the three supermarkets and other stores in Braintree attract 4.58% of sales: the Sainsbury's supermarket at 2.87% is the most important.

4.84 The Cambridge outlets barely register, and the Sainsbury's in Haverhill attracts no expenditure. Harlow draws 2.02%.

4.85 Internet / home delivery sales account for 3.72% of expenditure.

4.86 The Tesco in Great Dunmow attracts some 4.75% of sales from Zone 3. The more detail area analyses comprises Zones G, D and F, the former lying wholly within Zone 2 and the latter shared with Zone 1 to the north and Zone 3 to the west – see **Appendix 2b**.

4.87 Reflecting the above analysis, the Tesco supermarket in Great Dunmow accounts for 71.4% of main food expenditure in Zone G, the next most significant outlet being the Sainsbury's in Chelmsford accounting for 3.7% of sales, surpassing the Co-op in Great Dunmow at 3.1%. Some 3.1% of expenditure is drawn to the Sainsbury's in Braintree, other supermarkets within and outside the Study Area having minimal influence.

4.88 Zone D, shared with Zone 1, reveals the influence of the Great Dunmow Tesco falling to 24.6% of expenditure, similar proportions being attracted to Tesco in Saffron Walden at 23.5% and Waitrose in the same town at 19.5%. The zone clearly represents a trading break point between Zones 1 and 2. The Sainsbury's in Haverhill begins to exert influence, accounting for 3.9% of sales.

4.89 Other stores within and outside the Study Area collectively draw in significant trade from the zone.

4.90 Towards the west, shopping patterns in Zone F illustrate the increasing importance of the Bishops Stortford and Harlow supermarkets, collectively accounting for 41.3% of overall expenditure. The Sainsbury's in Jackson Square, Bishops Stortford, at 8.6%, the Tesco in Lancaster Way, Bishops Stortford, also at 8.6%, and the Waitrose in Bishops Stortford at 6.9%, draw the most significant trade. Despite this competition the Tesco in Great Dunmow accounts for 43.0% of sales, confirming that Zone F represents the trading break point between Zones 2 and 3.

4.91 Other stores exert very limited influence, although 5.2% of expenditure is drawn to facilities outside the Study Area.

Top-up Expenditure

4.92 The Co-operative supermarket in Great Dunmow becomes the most important focus of this type of shopping in the zone, accounting for 26.32% of expenditure. The Tesco supermarket is also an important attraction of such expenditure, drawing 24.56% of sales. Other shops in Great Dunmow, the market and local shops within the same zone account for a further 2.63%.

4.93 A considerable number of limited expenditure trips takes place in Bishops Stortford, Braintree, Chelmsford and Harlow.

Zone 3

The Shopping Facilities

4.94 This Zone is dominated by the stores Bishops Stortford and Harlow which lie outside the district and whose facilities were reviewed earlier in the Study. There is only one shopping centre of any significance in this zone.

Stansted Mountfitchet

4.95 The large village of Stansted Mountfitchet is located in the west of the district on the B1383 close by, and to the north-east of Bishops Stortford.

4.96 The centre is made up of two distinct parts, Cambridge Road and Lower Street, and comprises a limited mix of traders:-

Category	**Number of Outlets**	**Net Sales Floorspace**	
		m^2	**%**
Convenience	8	487	15.5
Comparison	11	886	28.2
Service	22	1384	44.1
Vacant	2	380	12.1
Totals	**43**	**3137**	**100**

Source: Savills Town Centre Survey Feb 2010 & update 2011

4.97 There are several small supermarkets in the combined facility. A Tesco Express of approximately 195 m2 sales has recently opened and there is a Co-op supermarket with a sales area of 186 m2. In addition to the above is a Budgens convenience store of about 160 m2 sales located within a petrol filling station to the north of Cambridge Road outside the defined town centre boundary. The convenience offer is supported by a number of independent traders including a bakery, butcher, newsagent and grocer.

4.98 With the exception of a Boot pharmacy, comparison shopping in the centre is very limited, and is somewhat specialised with shops selling antique, mirrors, furniture and soft furnishings.

4.99 Service outlets, and particularly cafes and restaurants, are a disproportionate element of the shopping offer, possibly because of the tourism attraction of the area based upon Mountfitchet Castle.

4.100 Two car parks support the centre together with limited street parking.

4.101 The retail content of the centre suggests that it meets the day to day largely top-up convenience needs of the immediate population and a very limited range of lower order comparison goods.

4.102 The detailed appraisal of the centre is contained in **Appendix 1d.**

Expenditure Flows

Combined Main Food Expenditure

4.103 This zone encircles the western and northern suburbs of Bishops Stortford and with its six major supermarkets it is not unexpected that they would account for the greater part of expenditure in this area. Between them the stores attract 72.71% of such expenditure. The Tesco, Lancaster Way, dominates this pattern at 30.42%, with the Sainsbury's in Jackson Square at 17.17% and the Waitrose at 14.86% accounting for the majority of the remainder.

4.104 The neighbouring town of Harlow is also closely related to the zone and the four main supermarkets in the town attract 7.26% of sales. The Tesco in Great Dunmow accounts for 4.75% of expenditure and the Co-op in Stansted Mountfitchet 2.92%.

4.105 The Tesco and Waitrose in Saffron Walden exert very limited influence in this zone, accounting for just 1.09% respectively of main food expenditure.

4.106 The detailed analysis offered by the Seven Zone data does not throw much further light upon the shopping patterns and, predictably, shows the particular stores exerting more influence within the particular sub-zone, especially the Bishops Stortford supermarkets upon Zone E.

4.107 The trading patterns in Zone C, shared with Zone 1, show considerable influences by the Saffron Walden supermarkets – Tesco and Waitrose at 18.2% each and the Tesco, Lancaster Way, at 17.1% again illustrating this zone as a trading break point between Zones 1 and 3.

Top-up Expenditure

4.108 By far the most important facility in this zone for top-up shopping is Stansted Mountfitchet, which attracts 29.33% of such expenditure. Surprisingly, local shops within Zone 3 attract no such sales but local shops within Zone 2 claim 9.33% (see **Appendix 3a**).

4.109 All the main supermarkets derive expenditure from the zone, the Sainsbury's in Jackson Square accounting for 5.33%. Limited trade finds its way into the Harlow stores.

Zone 4

The shopping facilities

4.110 Within Zone 4 there are a number of small villages offering a limited convenience and top-up function. These include the rural villages of Linton, Horseheath, Abington, Babraham and Pampisford.

4.111 Of these centres, Linton (population of 4,412 in 2001) is by far the largest with shopping facilities situated sporadically along a linear shopping street. The centre comprises approximately 26 retail and service uses including a gift shop, art gallery/photo and picture framing, opticians, pharmacy, a Co-Op (approx 288 m2 gross) selling a good range of foods suitable for top up shopping, newsagents, bakers, public houses, Chinese restaurant and takeaway, hairdressers and a barbers amongst others. In addition to its convenience function, the centre also includes a number of uses which would attract shoppers from further a field.

4.112 Retailing in the remaining centres is very limited with only Great Abington providing a noteworthy top up facility. This comprises of a small Costcutter / Post Office.

4.113 It is apparent from the size of these conveneince stores, that the conveneince offer within Zone 4 provides a limited top up function only.

Expenditure Flows

Combined Main Food Expenditure

4.114 This zone has been incorporated into the analysis because both the Retail Vision and Indigo Planning study demonstrate that some main food expenditure from this area flows into Zone 1. The subsequent NEMS Survey confirmed as the following analysis will illustrate, it is located at the point where a number of facilities have comparable trading influence.

4.115 The convenience goods expenditure flows table in **Appendix 3a** shows that the large Sainsbury's store in Haverhill is the most important facility, accounting for 27.94% of expenditure from within the zone: this falls away to just 4.89% in Zone 1. The new Tesco store in Haverhill is likely to exhibit a similar pattern. Collectively the Cambridge stores attract 30.22% of such expenditure from the zone, the most important being the Sainsbury's in Brooks Road, representing 7.15% of the sales.

4.116 A significant amount of expenditure finds its way into Saffron Walden, the Tesco accounting for 8.49% of sales and the Waitrose 8.17%.

4.117 Since Zone 4 is the same area as Zone A, the detailed Seven Zone analysis adds nothing further of significance.

Top-up Expenditure

4.118 A significant proportion of top-up expenditure is accounted for by the facilities in Haverhill and Sawston which, between them, claim 24.67% of which Sawston accounts for 13.14%. Another 9.14% is represented by the Cambridge supermarkets.

4.119 The Tesco in Saffron Walden attracts some 2.29% of expenditure.

4.120 A very substantial 46.29% of expenditure goes to other facilities outside the survey area, and one must assume these trips are dispersed over a wide area, possibly in association with employment.

Reasons for using the particular supermarket

4.121 The household survey information relating to this issue is contained within **Appendix 3d**.

Combined Main Food Shopping

4.122 By far the most important reason for customers using the main supermarkets within the Study Area was proximity, with convenience to home accounting for 45.3% of trips, easy to get to, 2.5%, and easy access, 1.2%. Quality of goods was cited by 11.4% of interviewees. Range of food products, lower prices, easy parking, habit and preference for retailer individually accounted for around 5% and below.

4.123 There are marked variations between retailers. The Tesco in Saffron Walden is an attraction for 44.5% of customers because of proximity to home, with easy to get to and easy access adding a further 10.2%. The quality of goods elicited no response; however, 10% of customers cited lower prices. Only 28.1% of those visiting Waitrose referred to convenience to home, but 36.8% referred to the quality of the goods and 7.8% preference for the retailer. Only 2.6% of visitors to Waitrose cited range of products, but 6.2% at Tesco's.

4.124 Some 71.1% of visitors to the Tesco in Great Dunmow attributed convenience to home as important, and easy to get to, 3.1%, whilst 6.1% advise they had nowhere else to go.

4.125 The Sainsbury's in Haverhill had a similarly high 69.6% of customers referring to convenience to home and 8.9% to quality of goods.

4.126 The Bishops Stortford supermarkets exhibited quite different reasons for visiting the store. Two of the three stores revealed convenience to home as the main reason – Sainsbury's, Jackson Square 31.5%, Tesco, Lancaster Way, 44.1% - but only 16.7% of the Waitrose shoppers put forward this reason. However, some 26.7% of the Waitrose customers attached importance to quality of goods, and 10% to range of food products. Some 14.3% of those shopping at the Sainsbury's did so out of habit.

<u>Top-up Expenditure</u>

4.127 Of those who undertook top-up shopping, predictably convenience to home – 53.0% - convenience to work – 5.9% - and can walk to store – 3.9%, strongly influenced shopping behaviour. Beyond those reasons are a raft of factors explaining the attraction of the particular store – quality of goods 6.6%, support local businesses 3.3%, range of food products 2.6%, lower prices 1.9%, work there 1.2%, and depends where I am at the time 1.0%, which, collectively, might explain why customers sometimes travel far afield. The disbursed nature of the visits might also be explained by the trip forming part of a primary expedition unrelated to shopping activities.

4.128 The responses in relation to the particular stores revealed some marked variations.

4.129 In relation to the Tesco in Saffron Walden, convenience to home was cited by 63.9% of customers and 26.6% consider proximity to work was the most important. By contrast only 39.4% of Waitrose customers cited proximity to home and convenience to work 9.1%. However, quality of goods was referred to by 15.1% of those surveyed, very substantially higher than for any other store.

4.130 Some 74.4% of customers visiting the Tesco in Great Dunmow referred to proximity to home, and 9.3% closeness to work. The Co-op attracted some 52.3% of those customers because of convenience to home. Both of these stores had significant proportions of customers referring to there being no alternative facilities as a reason for visiting the stores.

<u>Comparison Goods Expenditure</u>

4.131 Comparison shopping tends to be a more diffuse behaviour and very much reliant upon the particular merchandise being sought. It is, therefore, considered more analytically useful to examine expenditure flows largely in terms of movements across the Study Area and the various categories of comparison expenditure.

4.132 **Appendix 3b** sets out the expenditure flows in the Study Area relating to the nine comparison goods groupings used in the survey.

4.133 he schedule demonstrates that Cambridge is by far the most important centre within and beyond the Study Area boundary for these types of expenditure, attracting about 34% of expenditure over the four zones. Bishops Stortford accounts for some 11% of sales, Harlow 8% and Chelmsford 7%. Saffron Walden draws approximately 12% of comparison expenditure.

4.134 It is instructive to note that all the main centres attract trade from across all three zones, but especially from the zone nearest to them. Cambridge, for example, attracts 52.82% of sales from Zone 1 and around 5% - 6% from Zones 2 and 3.

4.135 The expenditure patterns vary dramatically depending upon the type of comparison merchandise.

<u>Clothes, Footwear and Fashion Goods</u>

4.136 For clothing the Cambridge outlets account for 37.8% of overall sales within the Study Area, and the sales travelling from Zone 1 constitute 58.05% of the expenditure of that area. Bishops Stortford and Chelmsford attract 13.4% and 10.3% of overall sales respectively, and Harlow 6.85%. Trade leaking to outside the region represents about 10% of the available expenditure.

4.137 Saffron Walden attracts 9.6% of clothing expenditure from Zone 1 and less than 1% from Zones 2 and 3 respectively. The Great Dunmow trade draw at 2.51% is confined to Zone 2.

4.138 The internet accounts for 6.52% of sales across the study area.

4.139 Individual stores attract very limited shares of expenditure, but John Lewis and Next in Cambridge collectively account for 2.3% of such sales in the Study Area, a somewhat greater proportion being drawn from Zone 1.

Chemists and Personal Care

4.140 Expenditure on health is more locally based. Saffron Walden accounts for 27.54% of sales in the Study Area but Cambridge at 17.83% of sales remains important, followed by Bishops Stortford at 13.04%.

4.141 Within Zone 1 Saffron Walden attracts 43.17% of expenditure and Cambridge 29.25%. Great Dunmow draws 46.63% of such expenditure from Zone 2, and Chelmsford 15.34%. Zone 3 is dominated by Bishops Stortford, which accounts for 55.36% of sales, and Stansted Mountfitchet 21.43%.

4.142 Boots the Chemist plays an especially important role, its branches in centres within and outside the Study Area drawing 23.9% of such custom from the Study Area. Within Zone 1 the Saffron Walden store accounts for 16.6% of such sales, and in Zone 3 the Boots in Bishops Stortford attracts 19.5% of trade from that area. The Stansted Mountfitchet outlet accounts for 11% of expenditure in the zone.

Books, DVDS, CDs and Stationary

4.143 Expenditure on books in the Study Area is shared between Cambridge - 17.21%, Saffron Walden - 13.77% and Bishops Stortford - 13.32%.

4.144 In Zone 1 Cambridge represents 28.66% of sales, but Chelmsford attracts high volumes in Zone 2 at 23.53%. Bishops Stortford attracts a significant proportion from Zone 3 with 51.69%. Saffron Walden draws 21.65% of expenditure from Zone 1, and Great Dunmow 15.44% from Zone 2.

4.145 There are no shops of particular significance for these types of sales.

4.146 Nearly 37% of overall purchases in the Study Area arise from the internet / delivered sales.

Toys, Sports Goods, Bicycles and Hobbies

4.147 Recreational goods are mainly the preserve of Cambridge, which attracts 34.65% of such expenditure from the Study Area. Saffron Walden and Harlow each account for 13.24%.

4.148 Within Zone 1 Cambridge draws 54.55% of such expenditure from Zone 1 and Saffron Walden 19.09%. Chelmsford attracts 35% of such sales from Zone 2, and Harlow 17.5%: some 15% is drawn to Braintree.

4.149 Predictably the trade draw pattern in Zone 3 is dominated by Bishops Stortford and Harlow who, between them, account for 72.23% of sales from the zone.

4.150 The Toys-R-Us retail warehouse in the Queensgate Centre in Harlow is by far the most important trader, accounting for 2.2% of expenditure from the Study Area: within Zone 3 its profile is higher, drawing some 7.3% of sales from that area.

4.151 The internet / delivery accounts for 12.68% of Study Area expenditure.

China, Glassware, Cutlery and Home Textiles

4.152 Cambridge is the leading attraction for this type of expenditure, drawing 49.02% of expenditure from the Study Area: the next most popular destination is Braintree at 12.8% followed by Bishops Stortford at 10.85%. Saffron Walden draws 6.91%.

4.153 Within Zone 1 Cambridge draws 72% of the sales, 15.52% from Zone 2 and 13.69% from Zone 3. Braintree accounts for 43.97% of sales from Zone 2 and 40.28% of expenditure from Zone 3 finds its way into Bishops Stortford. Saffron Walden and Great Dunmow attract very limited sales of this type.

4.154 The John Lewis store in Cambridge is by far the most important retailer for this type of expenditure, accounting for 13% of sales.

4.155 Internet / delivered sales represent 3.4% of expenditure from across the study area.

Audio Visual, DVD players, Computers, Cameras and Hifi Goods

4.156 Over the Study Area, 39.4% of this type of expenditure finds its way into Cambridge and 11.8% each into Saffron Walden and Harlow.

4.157 In Zone 1 Cambridge assumes greater importance, attracting 60.51% of such sales, followed by Saffron Walden at 17.52%. Within Zone 2, Braintree attracts 18.35%, Chelmsford 31.19% and Harlow 16.51%, the latter also drawing 37.6% of the Zone 3 sales. Bishops Stortford is responsible for 29.87% of expenditure from Zone 3.

4.158 John Lewis in Cambridge is by far the most important retailer for this type of expenditure, accounting for 9.1% of sales from the Study Area. Approximately 13% of such sales took place through retail warehouses.

4.159 4.158 Overall internet / delivered purchases amount to nearly 10% of the expenditure within the Study Area.

Washing Machines, Fridges, Dishwashers, Microwaves, Kettles and Ovens

4.160 Some 35.87% of expenditure of this type in the Study Area is directed to Cambridge, the next most important centre being Harlow at 13.96%. Saffron Walden attracts 11.84% of expenditure.

4.161 Cambridge accounts for 52.27% of such sales in Zone 1 and Saffron Walden 17.95%. Braintree attracts 28.8% of expenditure from Zone 2, followed closely by Chelmsford on 24%. Harlow accounts for 19.2% of trade from Zone 2 and 45.98% of potential sales from Zone 3. Bishops Stortford represents 31.03% of expenditure from Zone 3.

4.162 The John Lewis store in Cambridge attracts 10.1% of trade from the Study Area, and the Curry's outlet in the Cambridge Retail Park a further 2.9%. Collectively the Comet stores in Braintree and Harlow draw some 6.2% of expenditure. About 25% of such expenditure from the Study Area finds its way into retail warehouses.

4.163 Within Zone 1 the attraction of the John Lewis store rises to 15.5% and the Curry's outlet to 4.7%. Some 10.4% of expenditure from Zone 2 finds its way into the Comet outlet in Braintree, and the Comet on the Harlow Retail Park accounts for 12.2% of sales from Zone 3.

4.164 Over 10% of sales are affected through the internet / delivered.

Furniture, Furnishings and Carpets

4.165 Cambridge accounts for the greater proportion of such expenditure in the Study Area, attracting 38.19% of expenditure. Some 16.46% is drawn to Saffron Walden and 10.34% to Harlow.

4.166 Within Zone 1 57.29% of sales is attributed to Cambridge and 24.31% to Saffron Walden. In Zone 2 there are four centres attracting significant expenditure in the area: Great Dunmow 17.76%, Braintree 14.02%, Chelmsford 15.89% and Harlow 13.08%. Zone 3 is dominated by Harlow which takes 34.21% of the potential sales, and Bishops Stortford 23.68%. Stansted Mountfitchet accounts for 14.4% of expenditure.

4.167 Sales through retail warehouses account for 14% of expenditure and shopping centres beyond the region set by the existing facilities attract nearly 9% of potential sales.

4.168 One particular store dominates the shopping patterns, John Lewis accounting for 7.7% of expenditure from the Study Area, and within Zone 1 that attraction rises to 10.8% of expenditure.

4.169 The internet / delivered represents 2.53% of expenditure.

DIY, Decorating, Gardening Equipment

4.170 Predictably this type of expenditure is more locally based with Saffron Walden attracting 25.36% of expenditure from the Study Area, closely followed by Bishops Stortford on 21.53% and Cambridge on 18.02%. Haverhill accounts for 10.85% of sales.

4.171 Within Zone 1 Saffron Walden attracts 39.14% of potential sales, followed by Cambridge on 30.03% and Haverhill on 18.23%. Zone 2 sees Braintree as the principal attraction for this type of expenditure at 40.67% of the total: Bishops Stortford draws 20.67% and Chelmsford 16.67%. In Zone 3, 70% of sales are attracted to Bishops Stortford and 23.64% to Harlow.

4.172 The retail warehouses dominate this type of expenditure, those outlets both within and beyond the Study Area accounting for 64% of expenditure. The data indicates the sales are heavily focused within the local area.

4.173 The two dominant outlets are Homebase units, the one in Saffron Walden which accounts for 11.2% of overall Study Area expenditure and the unit in Fitzroy Park, Bishops Stortford, reflecting a similar percentage draw. The B&Q in the Chapel Retail Park, Braintree, draws 6.3% of expenditure. The B&Q on Newmarket Road, Cambridge, attracts 5.3% of expenditure and the Focus unit on the Cambridge Road Retail Park in Haverhill, 6.9%.

4.174 Predictably the stores closest to Zone 1 have increased attractiveness to the residents of that area, with the Homebase in Saffron Walden accounting for 16.7% of expenditure and the Focus in Haverhill 11.4%. The B&Q in Cambridge accounts for 8.8% of sales from this zone.

4.175 The main attraction in Zone 2 is the B&Q in Braintree, which represents 26.6% of such expenditure from that area. The B&Q on the Homelands Retail Park in Chelmsford draws 10.4% of sales from that area, and the Homebase in Bishops Stortford 9.5%. Proximity of Zone 3 to Bishops Stortford leads to the Homebase at Fitzroy Park attracting 39.6% of expenditure from the area, and the Focus outlet on the Goodliffe Park, Bishops Stortford, 9.8%.

4.176 Under 1% of purchases are via the internet or delivered.

Reasons for using the particular centres

4.177 The household survey provides a numerical breakdown of visitors to the various shopping centres and the reason for their travelling to that particular centre (see **Appendix 3d**).

4.178 Over the Study Area the main influence upon travel patterns for non-food shopping trips is convenience to home, which accounts for 40.8% of visits, followed by range of non-food products 12% and quality of goods 4.6%.

4.179 Lower prices, preference for a retailer, other shops and services nearby, easy to get to and close to work, individually account for around 2% to 5% of visits.

4.180 There are considerable differences between the various centres used for the purchase of non-food merchandise, and these distinctions are most clearly illustrated as between the main centres of Cambridge, Chelmsford, Bishops Stortford and Harlow and other smaller centres. Shoppers using those centres cite range and quality of goods as the most important determinant of their visits.

	Cambridge %	Chelmsford %	Harlow %	Bishops Stortford %
Convenience to home	14.0	14.7	23.6	57.0
Range of non-food products	16.2	24.0	21.1	9.7
Quality of goods	12.3	4.0	1.2	1.6

4.181 Bishops Stortford appears to be out of alignment but the convenience to home figure is likely to be heavily inflated because of the close proximity of parts of the Study Area population to the town, particularly Zone 3 and to a lesser extent Zone 2.

4.182 The attraction of the other smaller centres is far more reliant upon convenience to home and less upon range of non-food products and quality of goods. Saffron Walden at 68.9% in respect of convenience to home emphasises this functional difference, and similar relationships apply at Braintree, 44.1%, Great Dunmow, 65.4%, and Haverhill, 34.4%. In the light of the earlier analysis of expenditure flows upon different types of non-food merchandise, the largest centres with their wide range of goods derive their attraction from this factor and customers are relatively less influenced by travel times and distance where choice is critical. The differences in expenditure patterns relating to the other centres is also a reflection of the type of sales that they attract. It is generally recognised that expenditure for clothes, footwear and fashion goods are especially dependent upon the range of products which only a large centre can offer. Across the Study Area trips of this nature are shown to depend upon 28.7% of range of products and quality of goods, which compares with the overall non-food attraction factor of 16.6%. In the light of these considerations one would expect trips for the purchase of those products where standardised products are far more common, such as chemist goods, would be far more heavily influenced by convenience to home, and that is a conclusion which emerged from the earlier analysis.

4.183 The variations in shopping behaviour applying to the different types of shopping trip combined with the proximity or otherwise of the centres will influence the prospect of particular centres raising their comparison shopping status.

4.184 These considerations will be examined further in Section 6 when evaluating whether the main centres, particularly Saffron Walden, have the potential to increase their retention levels for comparison goods expenditure.

5.0 RETAIL TRENDS

5.1 There are a number of retail trends affecting expenditure and retail trading which, collectively, can have significant implications for the assessment of shopping requirements over the medium to longer term. These inputs tend to vary year to year and over prolonged periods can exhibit marked changes, so it is important to secure a tolerably reliable fix on such parameters.

Expenditure Rates – Nationally and Locally

5.2 This Study relies upon expenditure data compiled by Oxford Economics in association with Pitney Bowes Business Insight Corporation, both recognised economic research companies producing information and analysis for retail and market planners. The most recent Retail Expenditure Guide is that for 2013 / 2014 embracing the 2010 official ONS estimates of consumer spending in the United Kingdom.

5.3 Consumer retail spending estimates are available for several hundred individual categories, but the Retail Study employs the main categories based upon the COI COP classification, one based upon consumption by purpose, used by ONS and internationally. The broad classifications are:

Convenience Goods

To include food and non-alcoholic beverages, off-licence alcoholic drink, tobacco, non-durable household goods and newspapers and magazines.

Comparison Goods

To include, inter alia, books, clothing and footwear, furniture, audio-visual equipment and other durable goods, hardware, chemists, jewellery, watches and clocks, bicycles and recreational goods.

5.4 All estimates are inclusive of VAT and Special Forms of Trading.

5.5 It will be noted from Section 4 of the Study that the comparison categories used in the Uttlesford assessment vary slightly from the above listings because it was considered that our groupings better reflected the different ways in which shoppers went about these types of purchases.

5.6 Regional expenditure can be markedly different from the national pattern as a consequence of age, economic status, occupation and different income levels. Local Area Expenditure Estimates based upon these differences have, therefore, been obtained for the Study Area as follows:-

<u>Convenience Expenditure</u>
Zones 1, 2, 3 and 4.

<u>Comparison Expenditure</u>
Zones 1, 2, 3 and 4 combined.

5.7 The expenditure data reflects the comparison groupings used in the Retail Study. These groupings are used for the purposes of analysing expenditure flows for given types of goods but the quantitative and qualitative forecast exercises rely upon combined comparison sales, although separating out sales in stores, retail warehouses and Special Forms of Trading.

5.8 The price base used in the Retail Study is 2009 prices.

<u>Growth in Retail Expenditure</u>

5.9 The Oxford Economics Forecast model is a means of calculating growth in retail expenditure which is based upon spend per head at constant prices. Page 30 of the Retail Expenditure Guide explains that the model is based upon expected changes in economic variables and will take into account likely periods of high unemployment and a severe fiscal squeeze. Countering these will be low interest rates which will benefit those holding tracker mortgages, although interest rates on consumer credit are high. Weak consumer confidence and a desire to limit borrowings in a period of economic uncertainty will put limits on any renewed growth and in consequence Oxford Economics are forecasting weak consumer spending growth, particularly during 2011, before more rapid growth resumes.

5.10 This analysis led Oxford Economics to forecast growth of UK based retail expenditure over the period 2010 to 2021 of 0.5% per annum for convenience goods and 4% per annum for comparison goods. It is relevant to note that the model does not take into account the possible consequences of anti-inflationary interest rates rises mooted for 2011 / 2012. Largely as a result of revisions to official data, the November 2011 Guide suggests significant changes. In respect of convenience goods it advises an average annual growth rate between 2010 and 2021 of 0.3% per annum and for comparison goods 4.2% per annum. Because of the volatility of the figures in the immediate past and as anticipated over the next year or so, Oxford Economics have advised that a more accurate assessment of expenditure growth rates, especially for the period 2010 to 2016, would be obtained by use of the year on year figures in Table 3.5 of that document. This particularly effects the growth over the period 2010 to 2016 where some years show negative growth. The convenience and comparison analyses in Appendix 6 are, therefore, based upon this table.

5.11 In the same way that local retail expenditure data varies from the national figures, it is to be questioned whether the socio-economic profile of Uttlesford is better placed or not to resist these economic constraints. The Council's report, A Summary Profile of Uttlesford, prepared by the local Futures Group February 2010, contains a range of economic and social parameters comparing the district with the Great Britain average.

5.12 The positive features of the district comprise, inter alia:-

- Being in the top 40% of districts in terms of economic growth
- Being in the top 40% of districts as regards employment in knowledge-driven production and services
- Being in the top 40% of districts as regards self-employment
- A very high skills level, with the district ranking in the top 20% in terms of the population qualified to NVQ Level 4 and above
- Ranking in the top 20% of districts as regards employment in Uttlesford at 84% compared with 74% nationally
- Some 55% of the working population classified as professional, managerial or technical compared with 44% nationally
- Being in the top 20% of districts in terms of income, with the local average being £38,900 per annum compared with the national figure of £25,360 per annum
- The district ranks in the 20% least deprived districts
- The proportion of working population unemployed is very low with 2.1% of people claiming Job Seekers Allowance compared with 4.09% nationally

5.13 The negative features of the district include, inter alia:-

- The public sector can act as an important driver of the knowledge economy, but Uttlesford has a very small public sector with 17.5% of this sector compared with 27% nationally
- The new business formation rate is low, Uttlesford lying in the bottom 40% of districts

- The 24 months survival rate of businesses in Uttlesford is average by national standards
- Average annual incomes increased at a very low rate between 2000 and 2007, growing by 19.3% in comparison with the national increase of 30%, placing Uttlesford in the bottom 20% of districts

5.14 The overall indications of this profile would suggest the area is less vulnerable to economic impacts likely to be experienced over the next five years with a working population better placed to keep or find employment, with a relatively low proportion of public sector workers where job cuts will be high, and the protection afforded by the relatively high proportion of the workforce employed in knowledge-based industries and services.

5.15 The review of the socioeconomic characteristics of the Uttlesford area confirms the relative strength of the local economy and its ability to weather the current recession. However, the current economic situation is particularly volatile and we have taken the view that it would be prudent to adhere to the national advice on expenditure growth rates and perhaps pick up any possible uplift when circumstances become clearer.

5.16 There is no advice for expenditure growth rates for the post 2023 period and for projections beyond that date to 2031 we have, therefore, adopted the average for the period 2018 to 2023 of 1% per annum for convenience goods and 3.8% per annum for comparison goods.

Special Forms of Trading

5.17 In essence Special Forms of Trading (SFT) is that part of retail expenditure which does not pass through shops and/or create a need for retail floorspace. It has long been an adjustment in retail studies to reflect markets, door-to-door sales etc, but in recent years the introduction of the internet and other IT communications has considerably expanded the opportunity for this type of shopping. It is obviously essential that this Retail Capacity Study is confined to the need for actual floorspace.

5.18 SFT has been particularly volatile in recent years and as the latest Pitney Bowes study demonstrates (2012 based data) is complex because of many different ways people shop and the overlapping data sources. The Pitney Bowes report highlights a number of these issues.

Measurement	Shortcomings
ONS non store retail sales	• Includes only sales by wholly internet companies, e.g. Amazon, and no internet sales by companies also operating conventional stores, e.g. Tesco and John Lewis. • This means the ONS based figures hugely underestimate the impact of the growth of internet sales. • This database is called the 'Narrow Definition' of non retail sales. • The ONS also produce a second set of figures – Internet Sales – which covers all internet sales including those already included in the non store sales, e.g. Amazon and internet sales by predominately store based operations e.g. John Lewis. The resolution of this issue is not straight-forward as the two data series overlap.

Source	Compatibility
ONS internet Sales	• Includes sales of wholly internet based stores. • Internet sales of companies also operating conventional stores.
Narrow Definition	• Wholly internet based stores.

5.19 The Pitney Bowes report notes that there are no official estimates of the extent of this overlap, but a statistical modelling exercise carried out by Oxford Economics indicates that approximately 50% of all internet sales are already included in the ONS Narrow Definition of Non Store Retail Sales. The adoption of this approach allows the report to construct a 'Broad Definition' of Non Store Retail Sales in 2012, illustrated in Figure 3.2 of that report.

5.20 Over the 10 years to 2012 the Broad Definition of market share has increased more slowly than that of the ONS Internet Sales estimate, because the former contains the non internet elements of retail stores – mail order, door-to-door selling etc – that have suffered from the growth of the internet. The ONS internet sales estimate increased its share of total sales from 3.4% in 2007 to 9.3% in 2012, while the Oxford Economics Broad Definition of Non Store Retail Sales increased from 6.4% in 2007 to 11.1% in 2012. Figure 3.3 of that report illustrates.

5.21 Using ONS data and additional data from Datamonitor (UK E.Retail 2011) the report estimates that in 2012 the 11.1% of market share of the Broad Measure breaks down into 6.2% market share for convenience goods and 14.3% for comparison goods.

5.22 Projecting such figures into the future is a problematic exercise. At present the UK exhibits higher internet sales than either Europe or the USA, but there is no indication of the saturation point. The recent rapid growth in such sales makes it very difficult to gauge the levelling off point, although recognising that it will happen in due course. In the Central Case option it is assumed there will be a gradual slow down in the rate of increase of the Broad Measure of the Non Store Retail Sales market share, resulting in the market share for comparison goods flattening out at 17.6% for comparison goods and that for convenience goods levelling off at 7.8% by 2023.

5.23 A High Case option envisages a more gradual slow down of the rate of increase in internet penetration and under that assumption that 2023 forecasts become 20.2% for comparison goods and 7.9% for convenience goods.

5.24 The projected market shares of the Broad Definition – Non Store Retail Sales – over the period to 2012 – 2023 are forecast as:

	Central Case % of Total Spending Convenience	**Central Case % of Total Spending Comparison**
2012	6.2	14.3
2013	6.6	15.1
2014	6.9	15.8
2015	7.1	16.3
2016	7.3	16.7
2017	7.5	16.9
2018	7.6	17.1
2019	7.6	17.3

2020	7.7	17.4
2021	7.7	17.5
2022	7.8	17.6
2023	7.8	17.6

5.25 The above figures conceal the fact that many stores service their online sales from supermarket shelves, e.g. Tesco, and the report estimates that the difference between the Broad and Narrow estimates of convenience sales erred in favour of the former. The adjustment for this phenomenon is contained in Table 3.2 of the report.

	Non Store Convenience Goods – Adjusted Market Share **Non Store Sales of Convenience Goods (% of total spending on goods)**	
	Total	**Adjusted**
2012	6.2	2.7
2013	6.6	2.7
2014	6.9	2.8
2015	7.1	2.8
2016	7.3	2.8
2017	7.5	2.9
2018	7.6	2.9
2019	7.6	2.9
2020	7.7	3.0
2021	7.7	3.0
2022	7.8	3.0

2023	7.8	3.0

5.26 The Pitney Bowes Report includes no comparable information relating to sales of comparison goods, but we have obtained unpublished data from Oxford Economics relating to this sector.

5.27 Similar considerations apply to comparison goods sales as convenience goods sales in respect of internet sales being serviced from conventional stores. The following table reveals the effect upon sales taking this phenomenon into account.

	Non Store Comparison Sales – Adjusted Market Share **Non Store Sales of Comparison Goods (% of total spending on goods)**	
	Total	**Adjusted**
2012	14.3	9.6
2013	15.1	10.5
2014	15.8	11.1
2015	16.3	11.6
2016	16.7	11.9
2017	16.9	12.1
2018	17.1	12.3
2019	17.3	12.4
2020	17.4	12.5
2021	17.5	12.6
2022	17.6	12.6
2023	17.6	12.6

5.28 The tabulations in the Pitney Bowes report conclude at 2023. In order to provide some guidance as to net sales through retail floorspace over the plan period, Oxford Economics have provided us with unpublished data for the period to 2031.

	Adjusted Non Store Sales of Convenience Goods (% of total spending)	**Adjusted Non Store Sales of Comparison Goods (% of total spending)**
2024	3.1	12.6
2025	3.1	12.6
2026	3.1	12.7
2027	3.1	12.7
2028	3.2	12.7
2029	3.2	12.7
2030	3.2	12.7
2031	3.2	12.8

5.29 There is clearly a decline in the rate of growth of Special Forms of Trading for both convenience and comparison goods sales. However, projections at these distances must be viewed with caution and whilst permitting current floorspace assessments, as we have pointed out elsewhere in this study, the volatility of these figures demands regular reviews to ensure floorspace targets are based upon up to date analysis of spending patterns.

Sales Density Growth

5.21 Increasing sales density on retail floorspace increases the trading capacity of that floorspace to accommodate turnover and, therefore, the application of such an efficiency ratio reduces the need for floorspace.

5.22 There is no information upon this issue in the Retail Expenditure Guide, but the draft Briefing Note contains an explanatory analysis and advice on future trends.

5.23 The authors of the report took the view that the forecasting exercise should be based upon the growth rates over the period 1987 to 2000 rather than the unsustainable boom conditions of more recent years, with the result of sales densities of 0.6% per annum for convenience goods and 2.2% per annum for comparison goods. However, these were considered an over-estimate if used in local needs assessments, partly because of the "one-off" effect of Sunday trading and partly because of the use made of the weighting effect. In the light of these considerations the brief took the view that projected sales density increases could be justified at 0.4% per annum for convenience goods and 1.8% per annum for comparison goods.

5.24 The Study shows that within the main centres of Saffron Walden and Great Dunmow there are several relatively modern supermarkets where increases in efficiency might be anticipated. However, the centres of those towns, which accommodate practically the whole of the existing comparison floorspace in the district, are characterised by old, historic fabric, many listed buildings and embraced by Conservation Areas. The ability of such units to increase their efficiency is considered to be very limited. For the purposes of the existing retail capacity exercise a growth rate of 1.4% has been adopted for comparison goods floorspace.

6.0 RETAIL FLOORSPACE NEED

6.1 This section of the Study examines the need for shopping floorspace in the Uttlesford District over the period 2011 to 2031. The analysis is conducted in terms of expenditure upon and sales of combined main food, top-up food, comparison goods, retail warehousing and service floorspace. The detailed convenience and comparison capacity assessment are included in **Appendix 6a & 6b** respectively.

6.2 Whilst this study is obliged to carry the floorspace calculations through to 2031 to accord with the horizon of the Core Strategy, the ability to accurately predict the various inputs beyond 2023 is heavily constrained, and we would, therefore, caution against using the projected requirements other than as a very broad indication of floorspace need.

6.3 The household survey reveals patterns of expenditure across the Study Area reflecting the influence of the existing shopping facilities of varying scale, content and quality in relation to the size and distribution of the Study Area population. The quality of the transportation links serving these movements, especially roads, clearly has a part to play in the shape of the patterns.

6.4 The review of policy objectives point to the importance of the planning system being able to influence the distribution, inter alia, of shopping facilities to achieve sustainable planning and transportation objectives, particularly in relation to journeys by car.

6.5 In the light of these considerations it is appropriate to question whether the shopping patterns exhibited by the household survey should be maintained as a basis of future retail planning and whether the scale and distribution of retail floorspace should be manipulated to better achieve sustainable planning objectives. As part of that analysis, market and other considerations (dealt with later in the report) come into play in determining the appropriate strategies.

6.6 Markedly different considerations apply to food and comparison expenditure and, therefore, the retail floorspace needs are conducted upon these separate bases.

Main Food Requirements

The Strategy

6.7 The analyses of the expenditure flows in Section 4, based upon the four survey zones, demonstrates that zones 1 to 3 represent the core catchment areas for the three main centres of Saffron Walden, Great Dunmow and Bishops Stortford / Harlow. Since the boundaries of those zones broadly represent equal journey time break points between the centres, the expenditure flows confirm the accepted phenomenon that main food shopping is heavily influenced by the "closest to home" facilities. The more detailed analyses employing the seven zone survey material confirm that conclusion and leaves us comfortable with using those three zones as the basis for assessing future floorspace requirements to provide a sustainable retail strategy.

6.8 The current retention rates for main food shopping confirm support for this conclusion:-

	Zone 1	**Zone 2**	**Zone 3**
Retained Combined Main Food Expenditure	72%	54%	80%(1)

[1] This figure reflects the close physical interrelationship between Zone 3 and the centres of Bishops Stortford and Harlow.

6.9 Given the level of main food expenditure leakage, examination is required to establish whether the basis of the core catchment zones is flawed or whether the explanation supports the case for using those zones for assessing future requirements.

6.10 The relatively high retention rate in Saffron Walden is a reflection of the choice provided by two major supermarkets serving that catchment area, although there is some leakage to Cambridge (4.84%), Bishops Stortford (5.54%) and the large Sainsbury's supermarket in Haverhill attracts a further 4.89%. Some trade is likely to be drawn to the new Tesco in Haverhill.

6.11 Zone 2 based upon the town of Great Dunmow retains just 54% of its main food expenditure. There is considerable leakage to Bishops Stortford (13%) and Chelmsford (8%). The Co-op store in the town centre barely registers as a main food shopping facility. We take the view that the single store provision in the town is not sufficient to compete with the combined attraction of the major facilities in Bishops Stortford and Chelmsford assisted by the good road links between these two towns and

Great Dunmow. Despite its lack of facilities, Great Dunmow still manages to retain a considerable proportion of its main food expenditure.

6.12 Further evidence is brought to bear by the shopping patterns in Zone 3. The population of that zone is located abutting the eastern flanks of Bishops Stortford and Harlow, which between them offer shoppers ten major supermarkets. Given this interrelationship, it is unsurprising that this zone exhibits such a high retention rate and we consider it unlikely that increased retention is a realistic possibility. It is to be noted that the zone does not include any part of the built up area of Bishops Stortford or Harlow and were it to do so the retention rate would almost certainly be higher.

6.13 This assessment leads us to the conclusion that the three zones provide a sound basis for assessing future floorspace convenience needs. At present the retention rate is heavily influenced by the number, size and quality of the major supermarkets serving the area, in descending order of attraction depending upon the number of stores. Given that analysis, it would seem likely that the provision of additional supermarket facilities would create greater attraction for customers within the particular zones and increase the local retention rate. Such a change would represent a greater concentration of main shopping trips locally with considerable sustainable planning benefits. However, as the latest sections of the report demonstrates, the potential for increasing the retention rate in any particular zone is constrained by the minimum floorspace required to support a main food offer. The conclusions of the floorspace capacity exercises are that the floorspace need is well short of that which would support such an outlet until the latter stages of the plan period.

The Appropriate Retention Rates

6.14 A key consideration is the retention level which might be appropriate. A strong guide in this respect is that generated by the interrelationship between the supermarkets in Bishops Stortford / Harlow and the support population in Zone 3, and a further consideration is the outflow of the population to their place of work. The Uttlesford Economic Study indicates that nearly 50% of the population of the district travel outside the area to their employment, and against this backcloth we consider that the maximum retention level which might be anticipated in Zone 3 is that currently experienced, namely 80%.

6.15 The prospects for increasing the retention level in Zone 1 are similarly affected. As part of the iterative process for assessing requirements we made the judgement that if a third store could be introduced into Saffron Walden it would permit the assumption that the retention level for main food shopping could possibly be raised to 80% as a consequence of increased choice for the support population. This objective could be achieved by the expansion of the existing supermarket facilities but a more effective scenario would be the introduction of a wholly new trader thereby increasing consumer choice.

6.16 The same analytical process has been applied to Zone 2 and Great Dunmow. In this instance the current profile is of a one-store town with considerable leakage to supermarkets in the surrounding towns. In the light of the guidance from Zone 3 and the assumption adopted in relation to Zone 1, we take the view that the introduction of a further new supermarket trader into Great Dunmow could possibly raise the retention rate for main food shopping to a maximum of 75%.

6.17 However, incorporated in the existing commitments in Great Dunmow is the extension to the Tesco store granted permission, originally in 2006 and renewed in September 2013. At 2016 we calculate the extension will equate to convenience goods sales of £6.25m pa and comparison sales of £1.62m pa. We are of the view that such an extension would be less effective in improving the retention rate in Zone 2 because it would represent more of the same rather than increasing choice. At the same time its sales detract from the potential available to Great Dunmow in accommodating a wholly new operator. Accordingly, we consider that renewing the consent would prejudice achieving a more sustainable strategy of seeking to maximise the retention of expenditure within the area thereby reducing the extent and length of shopping trips.

6.18 The retention rates suggested reflect what we consider are the maximum likely to be achievable. They are aspirational, not targets. We would counsel against a strategy which assumed retention rates above those indicated. Given the evidence, we consider that those maximum targets would promote developments to improve local facilities without trading impact tensions, because the capacity would be available to support retail proposals. Beyond those limits it is our view that increased retention levels would not be achieved, with any surplus expenditure / sales having to be shared amongst the existing facilities with consequent unnecessary impacts and wastage of land resources.

Other Considerations

Other Expenditure through Supermarkets

6.19 In assessing the need for supermarket floorspace we have taken into account main food expenditure drawn into the facilities from surrounding zones but maintained at the level pertaining in 2011. These expenditure flows may well be affected by the improvement of facilities in those neighbouring zones, but since the amounts are small and we have no means of assessing such potential changes, no adjustments have been made. Similar considerations would also apply to expenditure outflows with consequent reverse effects.

6.20 A significant amount of top-up expenditure finds its way into the main supermarkets, largely from within the local zone but some trade crosses the borders between the zones. Because of the local nature of such shopping behaviour and a variety of influences upon the way in which people shop for this type of merchandise, we have assumed these patterns will continue to prevail whatever the influence of the strategy for increasing the retention rate for main food shopping.

Top-up Shopping Requirements

6.21 The previous section has examined main food and top-up expenditure through supermarkets and there remains a balance of expenditure comprising residual main food turnover and top-up sales through conventional shops. Throughout the Study Area as a whole this expenditure counts for 4.5% of overall convenience sales and is an element which requires consideration as part of floorspace requirements.

6.22 The pattern of expenditure representing this type of purchase is diffuse with perhaps, surprisingly, lesser allegiance to the local zone in terms of retention rates than for main food shopping. These flows would suggest that a significant influence upon shopping habits for this type of trip are employment and other activities taking the shopper away from the home zone during which such expenditure takes place. Predictably, some of the smaller outlets which did not register for main food shopping appear in the analysis, with the local facilities in Stansted Mountfitchet and the Other Shops in Zones 1 and 2 assuming relatively greater importance. Given the inherent nature of this type of shopping, there is no obvious locational strategy for determining floorspace requirements and we take the view that the pattern of expenditure revealed by the household survey is a reliable basis for defining the future growth and distribution of retail floorspace for supporting this type of shopping. Accordingly, the assessment for each of the zones incorporates the retained top-up expenditure and the inflows and outflows from those zones in determining the shopping floorspace to be accommodated by local shops to meet those requirements.

Methodology

6.23 The translation of the strategy for main food and top-up expenditure into floorspace requirements is undertaken in relation to the three zones which best define the shopping patterns of the support population. The methodology comprises the following steps:-

- Assessing the potential main food expenditure by reference to the population in a particular zone, multiplied by the expenditure per head figure. For 2016 – 2031 these inputs are uplifted by the population figures in Table 1 (**Appendix 6a**) and the expenditure levels raised to reflect the growth multiplier advised in Section 4.
- For 2011 adoption of the expenditure retention rate for each zone as determined by the household survey for 2010. It is assumed that the increased retention rates will come into effect over the period to 2031 during which time the policy would have led to the provision of additional facilities to give effect to that strategy. It is possible the increased retention rate will not have been achieved until towards the end of the plan period. It remains an aspiration to achieve sustainable planning objectives.
- The retained expenditure is converted into equivalent floorspace by applying a benchmark turnover to the sales figures in 2011. The benchmark figures are regarded as a proxy for neither under- or over-trading levels. They are adjusted in accord with the increasing efficiency ratios for retail floorspace set out by the analysis in Section 4 in the assessments for 2016, 2021,2026 and 2031.
- The requirement for additional supermarket floorspace in 2011 is calculated by deducting the existing floorspace from the overall retail need based upon benchmark turnovers. The capacity of the existing floorspace is assessed through the application of appropriate benchmark turnovers to that floorspace. Similar exercises are undertaken for 2016, 2021, 2026 and 2031, the existing benchmark levels being increased to reflect the efficiency ratios within those calculations.
- Where floorspace commitments have been identified these are located at the appropriate time horizons and deducted from the calculated need for additional facilities.

Requirements by Zone

6.24 The floorspace requirements for each zone reflect the different strategic objectives and programming as highlighted in the previous section.

Zone 1

6.25 **Table 8** provides an assessment of the need for additional supermarket floorspace over the period 2011, 2016, 2021, 2026 and 2031. It shows for 2011 a total spend going into Zone 1 supermarkets, mainly from Zone 1 residents, but also from other zones, of £60.15 mpa. Deduction of the benchmark turnovers of the existing Tesco and Waitrose supermarkets of £45.01 mpa and the Tesco in Haverhill of £1.24 mpa leaves residual sales of £15.14 mpa. The introduction of the committed Tesco and Waitrose extensions and the recently permitted Aldi supermarket at Thaxted Road absorbs capacity in 2016.

6.26 **Table 8** illustrates that convenience floorspace capacity in 2021, assuming that existing shopping facilities maintain their current market shares, will be 561 - 949 m^2. In 2026 it is 1073 – 1816 sq m. By 2031 the figure would have risen to 1553 - 2630 m^2.

6.27 Inputs from the marketing advisors suggest that the additional floorspace could be accommodated in a number of forms. As calculated the floorspace capacity in 2021 is equivalent to a small store operated by one of the major traders or a large discount supermarket. Market demand should be the determining factor, but to meet strategic objectives it should be located in Saffron Walden.

6.28 Table 12 (**Appendix 6a**) sets out the need for additional top-up floorspace in Zone 1 amounting to 108 m^2 in 2016 rising to 291 m^2 in 2021, 458 m^2 in 2026 and 622 m^2 in 2031. For reasons canvassed earlier no attempt is made to identify the preferred locations for these facilities and the floorspace should be treated as an advisory backdrop to future retail planning proposals; it is likely that part of the allocation would be represented by expansion within the town centre, but it would also support additional provision in suburban estate development, Thaxted and rural communities within the zone.

Zone 2

6.29 The supermarket floorspace requirement in this zone is assessed by Table 9 (**Appendix 6a**).

6.30 In 2011 it shows that the retained combined main and top-up food expenditure in Zone 2 supermarkets from Zone 2 and inflow from other zones amounted to £35.74 mpa compared with existing benchmark of £32.33 mpa. There is therefore a small amount of capacity in 2011 of 268 – 454 m^2.

6.31 In 2016 after allowing for the Tesco extension having become operational, there is no additional floorspace needed. In 2021 it rises to 278 – 471 m^2, in 2026 it is 589 – 998 m^2 and by 2031 to 807 – 1366 m^2 for main food and discount operators.

6.32 There is not surplus capacity to support a discount supermarket or a small main trader store until 2021. By 2031 we anticipate that a small foodstore or a discount store could be accommodated. It is important to note that marketing advice suggests that discount traders would be interested in such an opportunity. Whatever proposal comes forward, its location should be in the Great Dunmow area. A different trader would offer the best prospects of attracting back into the area combined food sales leaking to distant facilities particularly in Bishops Stortford and Harlow.

6.33 The residual top-up expenditure through shops in Zone 2 is estimated at £2.81mpa in 2016, £3.18 mpa in 2021, £3.61 mpa in 2026 and £3.89 mpa in 2031 (see Table 12 **Appendix 6a**).

6.34 The equivalent floorspace areas of 82 m^2, 222 m^2, 376 m^2 and 475 m^2 provide, in part, for expansion of small shop facilities in Great Dunmow centre and in part limited provision within rural communities.

Zone 3

6.35 The earlier analysis demonstrates that the residents of Zone 3 have reasonably convenient access to ten supermarkets in Bishops Stortford and Harlow offering extensive choice of trader. As may be anticipated, the retention rate is high at 80%.

6.36 This pattern of expenditure is ideal in promoting sustainable transport objectives and keeping leakage (and journeys) to the minimum. In the light of this shopping scenario we see no reason to suggest changes which undermines this strategy.

6.37 Whilst the growth in expenditure over the plan period would generate a need for additional supermarket floorspace in Bishops Stortford and Harlow, that is not a matter of concern to Uttlesford Council. However, the large settlement of Stansted Mountfitchet lies within the northern sector of Zone 3. In terms of the factors underpinning the strategy – closest to home facilities, achieving sustainable planning and transportation objectives – it is relevant to consider whether additional retail facilities are justified in Stansted Mountfitchet.

6.38 In terms of the main convenience provision within the zone, there are three small supermarkets in Stansted Mountfitchet with a combined floorspace of 510 m2. Table 10 (**Appendix 6a**) shows it is likely that these facilities attract the bulk of the £2.29 mpa in 2011 (of which £1.27 mpa is attributed to top-up sales) of spend from Zone 3. The residual expenditure amounts to £29.54 mpa in 2011 and it is apparent that a substantial proportion finds its way into Bishops Stortford and Harlow as main food expenditure.

6.39 The 80% retention rate applying to Zone 3 is a reflection of ease of travel time to these facilities and the extensive choice. There is an argument for employing a higher retention rate in respect of the immediate hinterland of Stansted Mountfitchet, but significantly tempering that figure given the overwhelming attraction of Bishops Stortford and Harlow for this type of shopping.

6.40 The settlement has a population of 5,900 and given that the population of the zone is approximately 18,600 it is reasonable to assume that the settlement and its immediate hinterland has a support population of at least 7,000. This would generate main food and top-up sales in 2011 of £14.76 mpa. Table 11 (**Appendix 6a**) illustrates the application of a 60% retention rate to the residual expenditure resulting in £8.86 mpa of available expenditure which anticipates the need for a store of some 697 m^2 sales area if occupied by one of the major traders, or 1181 m^2 if a discount operator. It is considered provision of that general order would be justified by retail need in the immediate area and the objective of reducing travel, particularly by car.

6.41 Table 12 (Appendix 6a) shows that the top-up shopping requirements amount to 88 m^2 in 2016, 238 m^2 in 2021, 375 m^2 in 2026 and 510 m^2 in 2031. The provision provides the backcloth for development proposals in Stansted Mountfitchet and other rural settlements.

<u>Comparison Shopping Requirements</u>

<u>The Catchment Zone</u>

6.42 It is apparent from the expenditure analyses conducted in Section 5 that shopping for comparison goods is made up of a far more complex series of decisions as compared with convenience trips. The patterns are a series of overlays of spheres of influence which are derived from proximity to a particular centre or facility, the nature of the merchandise being sought and the scale and content of the shopping centres and, thereby, their ability to meet the demands of the shopping expedition. Generally, the larger the centre with its extensive range of trading outlets, the greater its relative importance in accommodating the requirements of those merchandise lines where extensive range of choice is critical. The example most commonly used is fashion.

6.43 Where choice is less critical because products are more standardised, proximity becomes the more important. For the same reason, the trading areas of the smaller centres are able to meet the needs of a more localised support population. A much used example of this type of shopping expedition is chemists and personal care.

6.44 The review of the comparison expenditure patterns in Section 4 demonstrates this complex pattern with the larger centres such as Cambridge exerting their trading influence over the whole of the Study Area for certain types of comparison goods, but with far less penetration in respect of what are normally defined as lower order comparison merchandise. Conversely, the smaller centres of Saffron Walden and Great Dunmow are relatively more important for meeting the shopping needs for certain types of comparison goods over a more local area.

6.45 For the purposes of assessing retail floorspace requirements in the local centres, therefore, one cannot employ self-contained zones but must conduct the analysis in terms of the extent of penetration over an area which wholly or largely embraces the entirety of the sphere of influence of those centres. We are aware from the results of the household survey and Savills Shopping Model that the Study Area represents an area from which Saffron Walden and Great Dunmow draw almost the entirety, if not the whole, of their comparison expenditure. It is the Study Area which the Retail Study, therefore, uses for its assessment of potential sales and comparison floorspace requirements.

6.46 This section incorporates the assumption that the trade draw pattern into the centres, as revealed by the household survey, is maintained over the plan period to 2031. The later qualitative assessment examines whether this pattern warrants modification.

6.47 The quantitative assessment is based upon the combined comparison sales generated in the Study Area. Apart from the illusory accuracy of a sector by sector analysis, the planning system cannot control what trader occupies a particular unit. **Appendix 6b** illustrates the pattern of comparison expenditure and the draw of such goods into Saffron Walden, Great Dunmow, Stansted Mountfitchet, and Thaxted from the Study Area. The figures for Cambridge, Bishops Stortford, Harlow and Chelmsford are included to provide context.

Centres	Total %
Saffron Walden	11.99
Local shops within Zone 1	0.01
Great Dunmow	2.36
Stansted Mountfitchet	0.74
Thaxted	0.02
Cambridge	34.23
Bishops Stortford	10.77
Harlow	8.04
Chelmsford	7.2
Internet / Delivered	8.81

6.49 The application of the Local Expenditure Data to the percentage draw figures for Saffron Walden and Great Dunmow reveals the extent of comparison sales drawn into those centres in 2011.

Centres	Comparison Turnover in 2011 % Retention of Potential Expenditure	£mpa
Saffron Walden	12%	42.73
Great Dunmow	2.36%	8.41
Stansted Mountfitchet	0.74%	2.64
Thaxted	0.02%	0.07

6.50 For the purposes of the preliminary quantitative assessment of floorspace requirements the assumption is made that the retention rates of the various centres over the period to 2028 remain the same. We will return to this issue when considering any potential qualitative changes. Over the plan period the expenditure figures need to be adjusted to reflect the population changes and the real increases in comparison expenditure examined in Section 5. Similarly, the projected expenditure has to be adjusted at 2016, 2021 and 2026 and 2031 to take into account the increasing proportion of SFT within that expenditure to ensure the resultant capacities represent sales through shops. Those exercises are set down in Tables 5a, 5b, 6 and 7 (**Appendix 6b**) and are summarised below:-

Centre	**Turnover 2011 £mpa**	**Turnover 2016 £mpa**	**Turnover 2021 £mpa**	**Turnover 2031 £mpa**
Saffron Walden	42.73	53.86	70.21	112.52
Great Dunmow	8.41	10.32	13.4	21.38
Stansted Mountfitchet	2.64	3.23	4.21	6.66

6.51 The turnover forecasts are subject to several further adjustments in order to quantify floorspace requirements. The 2011 turnover figure is translated into floorspace by the application of a benchmark sales factor for that year, representing what might be regarded as an equilibrium situation i.e. neither under nor over trading. Those benchmarks vary, being based upon the average for the comparison floorspace in the particular centre but in respect of certain individual outlets below company average where appreciation of its trading profile suggests appropriate. This is particularly relevant for Saffron Walden which is regarded as trading somewhat over benchmark levels. The resultant floorspace requirements for 2011 are then compared with the existing comparison floorspace, the differences indicating whether there is currently an over or under provision of retail floorspace.

6.52 The benchmark figure have to be projected forward to 2016, 2021, 2026 and 2031, adjusted to reflect the increasing floorspace efficiency ratios from Section 5, and the above process repeated to determine retail sales requirements.

6.53 Shopping scheme commitments are deducted from the floorspace targets at the appropriate stage of the evaluation process depending on the likely date for them to begin trading. Tables 5, 6 and 7 (**Appendix 6b**) provides the detailed analysis of the above processes. The results for each of the centres is summarised below:-

Centre	Floorspace need 2016 m^2	Floorspace need 2021 m^2	Floorspace need 2026 m^2	Floorspace need 2031 m^2
Saffron Walden	-1932	652	3362	6,392
Great Dunmow	-807	-70	702	1565
Stansted Mountfitchet	127	346	555	739

Thaxted has not been considered due to its present retention rate equating to a negligible floorspace requirement.

Qualitative Assessment

6.54 The quantitative assessment is based upon the current attractions of the main comparison goods retail centres

6.55 Policy R2 of the Local Plan allows for retail and commercial development in Saffron Walden, Great Dunmow, Stansted Mountfitchet and Thaxted such as to maintain or enhance their role as retail and service centres and contribute to the diversity of activity.

6.56 Saffron Walden is a principal shopping centre which Policy seeks to sustain and enhance. The household survey shows it performing a main food shopping role and attracting a significant proportion of comparison expenditure.

6.57 Great Dunmow has a similar role, although its comparison goods function is limited.

6.58 Stansted Mountfitchet is described in the Local Plan as a local centre and the household survey reveals it has a very limited role as a comparison facility. We consider it is unrealistic for the centre to significantly expand its comparison sales function. Thaxted has a much smaller draw of £0.07m and as such any floorspace requirement would be negligible in floorspace terms.

Past Floorspace Changes and Commitments in the Uttlesford Centres and the Main Surrounding Centres

6.59 A measure of the relative functional positions of the shopping centres is to examine the growth (or contraction) of the comparison shopping facilities in recent years and establish the extent of major retail commitments. Such movements provide a clue to the relative growth or decline of a centre and, thereby, the need for remedial measures to restore its status. Such movements are, of course, taking place continuously so that, at any one time, a centre will be ahead of or behind the norm. It is when those floorspace movements depart seriously from what might be generally anticipated by growth in comparison expenditure that significant floorspace additions may be called for in order to maintain the centre's appropriate position in the hierarchy. A comparative analysis is, therefore, required showing the extent of these changes in Saffron Walden and Great Dunmow as compared with the major competing centres of Cambridge, Bishops Stortford and Chelmsford.

6.60 Floorspace material has been obtained from the various planning authorities relating to increases over the past decade and development commitments within the town centres. Unfortunately the material could not be provided over consistent periods, but nonetheless an appreciation can be gained of the relative growth rates in the recent past.

Comparison Retail Floorspace Changes and Commitments

Shopping Centres		Town Centre Retail Floorspace sq m	Town Centre Retail Floorspace sq m in 2014	Growth to 2014	Commitments sq m gross
Cambridge In Centre	Convenience	4,100[1]	5,206[2]	1,106	
	Comparison	92,479	109,596	17,117	
Cambridge Out of Centre	Convenience	22,306	22,306	0	8,401
	Comparison	48,035	48,035	0	2,777
Bishops Stortford In Centre	Convenience	3,418[3]	7,350[4]	3,932	637
	Comparison	19,263	18,399	-864	16,113
Bishops Stortford Out Centre	Convenience			0	
	Comparison			0	

[1] Cambridge City & South Cambridgeshire Study 2008
[2] Cambridge City Annual Monitoring Report 2013
[3] East Herts Retail Study 2008
[4] East Herts Retail Study Update, November 2013

Chelmsford In Centre	Convenience	6,869[5]	6,151[6]	-718	5,249
	Comparison	40,950	0	-40,950	26,217
Chelmsford Out Centre	Convenience			0	
	Comparison			0	
Saffron Waldon In Centre	Convenience	2,310[7]	3,300[8]	990	929
	Comparison	8,910	11,066	2,156	254
Saffron Waldon Out of Centre	Convenience			0	2,132
	Comparison			0	4,797
Great Dunmow In Centre	Convenience	1,323[9]	1,890[10]	567	
	Comparison	1,937	2,421	484	40
Great Dunmow Out of Centre	Convenience			0	
	Comparison			0	452

6.61 The floorspace figures illustrate that the local centres of Saffron Walden and Great Dunmow have experienced markedly different growth profiles as compared with the main centres of Cambridge, Bishops Stortford and Chelmsford. Behind the figures are a number of important considerations:-

- The sub-regional centre of Cambridge has seen considerable increases in comparison floorspace in recent years with further floorspace in the pipeline. There has been a tendency for the major centres to attract an increasing share of the comparison sales market, and Cambridge's status as a growth area has assisted this process. Despite the historic nature of the central area of the city the recently opened Grand Arcade provides a wide range of comparison shopping outlets including a large department store. Cambridge has undoubtedly increased its trading attraction over the recent past.

[5] Chelmsford Retail Study 2005
[6] 12/00838/FUL Retail and Planning Statement Evidence and 12/01058/FUL Planning Statement
[7] Saffron Waldon and Great Dunmow: Uttlesford Retail Capacity Study, January 2012
[8] Saffron Waldon and Great Dunmow: Uttlesford Retail Monitoring 2012-2013 and Retail Floorspace Approved between 1.4.13 and 25.2.14
[9] Saffron Waldon and Great Dunmow: Uttlesford Retail Capacity Study, January 2012
[10] Saffron Waldon and Great Dunmow: Uttlesford Retail Monitoring 2012-2013 and Retail Floorspace Approved between 1.4.13 and 25.2.14

- Less growth has taken place in Bishops Stortford and Chelmsford, but a number of town centre schemes have ensured that those centres have kept pace with the real increases in comparison goods expenditure by their support populations.
- Saffron Walden has experienced a reduction in comparison retail floorspace in the past ten years largely due to a number of fringe, poorly located shop units succumbing to the pressure of high residential land values and changed use.
- Evidence from our town centre appraisal demonstrates that Saffron Walden has a preponderance of small units, a reflection of the historic nature of the fabric, and our consultations with retail agents and the Chamber of Trade (**Appendix 7**) confirms our view that this has placed a strong fetter upon the ability of some national traders from securing accommodation, including Marks & Spencer. There have been no sites readily available for development and the only town centre scheme in the pipeline anticipates a modest increase in comparison floorspace.
- Similar considerations apply to Great Dunmow where there has been a substantial reduction in comparison floorspace. However, this is a comparatively small centre with very limited attraction as a comparison facility, and one suspects will not easily resist the tendency for comparison expenditure to increasingly depart to the larger centres. Like Saffron Walden it comprises historic fabric with very limited opportunity to provide for the larger unit, although there is a redevelopment site on the fringe of the central area. The household survey does not reveal particular support from local customers for an extension of its comparison goods offer.

6.62 This review of the growth of the comparison goods offer at those centres which account for the greater proportion of such expenditure in the Study Area confirms that Cambridge will continue to dominate, if not expand its role. Bishops Stortford and Chelmsford will at least keep pace with the needs of their hinterlands.

6.63 The lack of growth in comparison floorspace in Saffron Walden suggests that the relative attraction of the centre has diminished when compared with competing centres. Had that been due to development opportunities not being taken up, it would have been reasonable to assume that the situation was one of a natural adjustment in the hierarchy but, as noted, the lack of investment has been very largely due to there being no redevelopment sites available and, in particular, ones which could accommodate the larger comparison outlets which represent a major deficiency in the profile of the town. Our view, confirmed by the marketing advisors, is that if development opportunities are provided in Saffron Walden town centre, there is likely to be a strong response from the market to recapture that lost influence.

6.64 Great Dunmow has a similar profile, but it is evidently a centre with limited attraction for this type of shopping and one suspects the step change necessary to significantly improve its relative attraction is unlikely given the proximity of Chelmsford and Bishops Stortford. The marketing advisor confirms that analysis and it is noted that the household survey demonstrates no significant support for improved and expanded facilities in the town from the local population

Retailer Requirements

6.65 A retailer requirements search was carried out using FOCUS who are one of the UK's most comprehensive database of verified commercial property information. Due to the proximity of large neighbouring centres such as Cambridge, Harlow and Chelmsford, the search was based on those requirements which relate to Saffron Walden and Great Dunmow. All national / regional requirements were omitted as they could artificially inflate the results.

6.66 The search of Saffron Walden requirements identified a total of five traders including three from fashion retailers Edinburgh Wollen Mill, Phase Eight and Mistral Clothing. The actual floorspace requirement varied between retailers but ranged between 65 – 140 m^2 sales. The remaining two requirements were from Lloyds Pharmacy and Card Factory.

6.67 In addition to the town specific requirements, there are also a number of requirements for the region and County. Although many of these are likely to be directed towards the major centre's of Cambridge, Chelmsford and Bishops Stortford, it still remains a possibility that Saffron Walden could also be a target destination. It is important to note that a number of national retailers only identify national / regional requirements as opposed to town specific requirements.

6.68 No requirements were identified for Great Dunmow.

The Household Survey

6.69 When interviewees were asked why they visited the main centres for non-food shopping there was a marked distinction between the answers relating to Cambridge, Chelmsford and Bishops Stortford as compared with the other facilities. Convenience to home was cited by some 14% of respondents as to why they visited Cambridge and Chelmsford, whilst the range and quality of goods and preference for retailer was regarded by 35% of shoppers as the key factor in using the particular centre.

6.70 Predictably the close proximity of Bishops Stortford to the Study Area gave rise to 57% of shoppers recording this as a determining factor in making the trip.

6.71 To further demonstrate the importance of range and choice of goods in influencing comparison goods shopping patterns, the major facility of Thurrock revealed 35% of customers thought those factors were determining, whereas convenience to home was referred to by just 7% of those interviewed. It is to be noted that the number of survey answers relating to Thurrock was small and, therefore, arguably less reliable.

6.72 Some 62% of non-food shoppers visiting Saffron Walden considered convenience to home the most important influence, whereas the range and quality of goods accounted for 10%. Great Dunmow is also heavily reliant upon convenience to home – 65% - but the range and quality of products was cited by 7% of those questioned.

6.73 There appeared to be a strong requirement on the part of the shopping public for improved facilities in Saffron Walden. When asked what improvements would encourage them to use the facilities more often or more intensively, 30% referred to the importance of more independent shops (9.1%), more clothes and fashion shops (8.4%), more department stores (7.7%), more quality / designer shops (2.5%), more discount shops (2%) and better ranges of stores (1.1%). These same factors were, collectively, referred to by 16% of interviewees not presently using the centre, as an encouragement to using the facility.

6.74 There is less pressure from the shopping public for improved comparison shopping facilities in Great Dunmow, with those same factors being cited by 16% of those who are at present using the centre. That proportion drops to 6% in relation to shoppers who currently do not use Great Dunmow.

6.75 Better and more car parking was seen by 14% of visitors to Saffron Walden as promoting more intensive use: the figure rises to 18% in respect of Great Dunmow.

6.76 Whilst shoppers' intentions do not necessarily translate to on the ground changes, there are strong indicators that customers who purchase comparison goods in Saffron Walden town centre would use those facilities more intensively if the retail offer was improved in the manner suggested by the Questionnaire. Those same shoppers are presently using the more distant centres of Cambridge, Chelmsford and Bishops Stortford for this type of shopping.

Tourism Expenditure

6.77 Tourism is a major sector of the national economy generating considerable retail expenditure by both foreign tourists and local visitors.

6.78 Uttlesford has an attractive countryside area close to London and a considerable number of recognised tourist attractions – Audley End near Saffron Walden, the historic village of Thaxted, the historic centres of Saffron Walden and Great Dunmow and Stansted Mountfitchet Castle.

6.79 In order to assess the implications for the local economy, Uttlesford Council commissioned a study in 2005 – Economic Impact of Tourism – which was undertaken by East of England Tourism (EET) using the Cambridge Economic Impact Model. The report advises that the results of the exercise should be regarded as indicative and are best used as a snapshot in time, and cautioned against year on year comparisons.

6.80 The survey revealed that out of total tourism expenditure of £119m at that time, £33m is related to staying visits and £86m to day visits. Within that total, shopping accounted for £36m with staying visitors spending £6m and day visitors £30m.

6.81 There is nothing in the report to indicate the breakdown in expenditures between convenience and comparison goods and where those sales took place. Further investigations of the EET provided no clarification.

6.82 We would judge that whilst some visitors, particularly day visitors, buy provisions, by far the greater proportion of expenditure is likely to be upon comparison goods. Later in the Study we make a value judgement as to what the tourist element might imply for sales in the main centres and resultant floorspace requirements, but the foregoing expenditure figures suggest tourism brings very considerable comparison expenditure into the area. It is to be noted that Venuescore identify Saffron Walden as a centre attracting tourist expenditure.

Venuescore

6.83 Venuescore is a system for ranking shopping centres and for assessing whether, given their size and status, their content is in line with comparable shopping centres. It is based upon a number of indices with a particular emphasis upon fashion. The analysis of Saffron Walden town centre within this context assists in deciding whether the centre has potential for raising its offer and, thereby, relative trading status.

6.84 The retail offer of each shopping venue in the UK is evaluated using a straightforward scoring system which takes account of the presence of each location of multiple retailers – including anchor stores, fashion operators, non-fashion multiples.

6.85 The score attached to each operator is weighted to reflect their overall impact on shopping patterns, thus anchor stores such as John Lewis, M&S and Debenhams receive a higher score than other unit stores such as Next and River Island.

6.86 Saffron Walden is ranked towards the top end of the Minor District (MD) classification. For this reason, we also included District (D) classification centres within our search, as it is more likely that the comparable centres would fall within this classification. Only 13% of all centres within Venuescore fall within the MD classification, but 56% fall within the Local classification, which is by far the greatest number of the classifications.

Fashion Orientation Index

6.87 Indexed measure of the degree to which the Javelin venues offer is biased towards fashion (high = bias towards fashion, low = bias away from fashion). On average fashion contributes towards approximately 40% of the total Venuescore for all centres.

6.88 Saffron Walden scores a FOI of only 69 (average being 100). This means that the fashion orientation is significantly below the UK average (represented by 100). However, it is important to note that of all the D and MD centres, only 6% score higher than the 100 average. Of the total D and MD centres, only 26% score higher than Saffron Walden and of the comparable centres (similar population) only 38% score higher. This suggests that in terms of fashion offer, Saffron Walden's offer is good / above average when compared to other similar centres (top 70% for both D and MD centres and within the top 40% for similarly sized centres). This points to the offer not being good in comparison to the national average, but it is not abnormally low.

Market Position Index

6.89 Indexed measure of the degree to which the Javelin venue's offer has a high end or discount focus (high = bias towards high end retailers, low = bias towards discount orientated retailers). The scoring system ranks the centres by Upper, Upper Middle, Middle, Lower Middle and Down.

6.90 Saffron Walden scores 112, which means that the offer is above the national average. The centre's offer is considered to be in the Upper Middle classification, suggesting the offer is more upscale. Saffron Walden sits within the top 10% of all D and MD centres in terms of its market position, suggesting that the centre's offer is higher end. In terms of comparison with other similar sized centres, Saffron Walden is within the top 25%.

Fashion Position Index

6.91 Indexed measure of the degree to which the Javelin venue's offer has a fashion forward or traditional focus (high = bias towards fashion forward retailers, low = bias towards traditional retailers). The fashion forward centres are considered to be the more fashionable shopping venues.

6.92 Saffron Walden scores 72, which means that it is biased towards traditional retailers. Saffron Walden falls within the bottom 10% for both D and MD centres, suggesting the offer is very much focused towards the more traditional offer.

Age Position Index

6.93 Indexed measure of the degree to which the Javelin venue's offer is biased towards retailers with a young or old focus (high = bias towards older focus retailers, low = bias towards younger focus retailers).

6.94 Saffron Walden Is described as a centre catering for the older focused retailers. This was fairly normal, given that the 85% of the D and MD centres fell within this classification.

Tourist Orientation Index

6.95 Indexed measure of the degree to which the Javelin venue's offer is biased towards retailers with a tourist focus (high = bias towards tourist focused retailers, low = bias away from tourist focused retailers).

6.96 Saffron Walden scores 136, suggesting the centre is biased towards tourist focused retailers. It also falls within the top 10% of all D and MD centres.

Fashion Offer Conclusions

6.97 Based upon the above, we conclude that Saffron Walden is fairly typical of other MD and D centres in terms of the amount of fashion retailers as a proportion of its total offer. Although it is considerably below the UK average, Saffron Walden is on a par with the bulk of other MD and D ranked centres. Only 6% of the D and MD centres scored above the UK average. When comparing Saffron Walden with centres of similar population, Saffron Walden falls within the top 40%, demonstrating that, when compared with comparable centres, its low fashion offer is normal.

6.98 In addition to the limited fashion offer within Saffron Walden town centre, Venuescore also identifies the type of fashion retailers present as being "traditional" retailers. Traditional retailers such as Laura Ashley sit at one end of the spectrum, whereas progressive fashion retailers such as American Apparel sit at the other end. This, coupled with the lack of offer, would suggest that the centre is geared towards more traditional shoppers and also explains why so many shoppers choose to use Cambridge for their clothing and footwear shopping.

6.99 Whilst the analyses reveal an apparent significant opportunity to improve the fashion offer, it must be tempered by the fact that the main competition is the wide range of fashion outlets in Cambridge city centre, including those meeting the demands of the younger market.

Summation of the Qualitative Considerations and Retail Floorspace Requirements

6.100 The purpose of the qualitative considerations is to establish whether, collectively, there is justification for making any changes to the retention level for this type of expenditure and, thereby, the need for retail floorspace.

6.101 In relation to Great Dunmow we consider the circumstances do not warrant any modification to the level of attraction revealed by the household survey. Whilst the town centre comparison offer has reduced over the past six years and the centre is constrained by its historic fabric, none of the factors represent a strong argument for reviewing the retention levels. We attach importance to the fact that several sites within the town centre have been available for a considerable time without generating action, when real increases in comparison expenditure of the support population within the last decade has been considerable. This suggests the market has come to its own conclusions about the status of Great Dunmow for this type of shopping and it would be unrealistic to plan for additional floorspace beyond that level suggested by the household survey. The marketing advisors concur with this analysis.

6.102 The evidence for basing retail floorspace requirements in Saffron Walden on a higher retention rate is far more compelling. It is an important centre for this type of shopping, particularly in its immediate catchment area, and whilst it will never dislodge Cambridge as the focus for purchases requiring wide choice, it already attracts significant sales of lower order merchandise. The loss of comparison floorspace over the past decade is attributable to poorly located outlets on the fringe of the town centre being redeveloped for housing, a situation compounded by the lack of any redevelopment sites to accommodate the increasing need for comparison floorspace. Floorspace growth stagnated, and with it, almost certainly influence as a shopping destination. There is considerable interest by retailers to secure representation in the town and from customers for expanded and improved facilities. The marketing advisors confirm off-list interest is strong.

6.103 No figures are available relating to retail tourist expenditure, but the EET Study suggests it is substantial across the district. The Venuescore data points to Saffron Walden town centre shops attracting sales from this sector, but the household survey can provide no information in this regard. Clearly some expenditure of this nature leaks out of the area through local residents undertaking retail tourism whilst visiting more distance places but given the wealth of tourist attractions in the area, we consider there is likely to be a positive balance of such expenditure in the Saffron Walden area. The statistical inputs to the retail assessment tables can make no reliable estimate of expenditure from this source.

6.104 As at 2011 the total available spend in the town, based upon the existing retention level of 12%, is £42.76 mpa. That figure includes the sales going into other comparison facilities outside the town centre, namely the Homebase, Ridgeons and the comparison goods element in the Tesco store. Their combined benchmark turnovers of £3.85 mpa are deducted from the overall sales leaving town centre comparison sales of £38.91 mpa. The resultant average benchmark turnover of the town centre floorspace is £4,293 m^2, which is within what might be regarded as the collective range of town centre facilities. Discussions with the retail agents and the Chamber of Trade (**Appendix 8**) suggest that the town centre is neither under nor over trading and we have therefore assumed a benchmark figure of £4,200 m^2 to assess future requirements.

6.105 The calculations are carried forward using the expenditure growth rates and efficiency ratios advised in Section 5. The comparison floorspace commitments contained in the Tesco extension, Waitrose extension, the Thaxted Road Retail warehouse scheme and the Emsom Close scheme are deducted from the capacity exercise at 2016. The need for additional comparison floorspace in the town centre is calculated at -1,932 m^2 in 2016, 652 m^2 at 2021, 3,362 m^2 at 2026 and 6,3924 m^2 at 2031.

6.106 Table 5a sets out the floorspace requirements for Saffron Walden assuming maintenance of the retention rate shown by the survey and reveals a requirement in 2031 of 6,392 m^2. An expansion of floorspace below this level would represent a further diminution of the influence of Saffron Walden as a comparison goods shopping centre.

Programming

6.109 It will be appreciated from the later review of the sequential test sites that there is insufficient identified capacity to meet floorspace requirements over the planned period to 2031. There will be a need to undertake a continuous review of development opportunities in order to achieve capacity for that retail floorspace. These circumstances point to choice having to be exercised in the promotion of retail development, particularly in the early stages of the plan period, in order to most effectively meet the identified floorspace need and avoid further loss of market share. This applies particularly to the requirements for Saffron Walden.

Saffron Walden

6.110 Table 8 shows the convenience floorspace requirement of the town assuming the main food retention rate is confined to that revealed by the household survey of 72%, and demonstrates that at 2016 there is no requirement for additional floorspace and this is 561 - 949 m^2 in 2021. On the same basis, in 2026 a need for 1073 m2 sales (big 4 retailer) and 1816 m^2 sales (discounter) arises. By 2031 the figure would have risen to 1553 - 2630 m^2.The later sections of this chapter advise that the retention rate or market share for comparison expenditure in the town based upon its profile and the comparative and marked loss of status against the competing centres should be at least maintained. In 2031 this manifests itself in table 5 as a need for an additional 6,392 m^2 in comparison retail floorspace.

6.111 It is apparent that the preliminary assessment of floorspace capacity in Saffron Walden town centre falls well short of the requirement for convenience, comparison and service floorspace as at 2031 of some 8,000 m^2, although for working purposes one might adopt a 50% figure for service floorspace within the retail core of 4,000 m^2 and it is possible that the convenience requirement would be met by a discount operator located outside the town centre. At 2021 the figure embracing just the comparison and convenience floorspace is substantially lower at 1,200 m^2 which suggests much of the requirement could be accommodated. However, we take the view that priority should be given to remedying the reduced influence of Saffron Walden town centre for comparison shopping and that any floorspace that comes on stream in the earlier phase of the Plan should be reserved, through judicious use of master planning and development briefs, to comparison and service shopping activities.

6.112 Over the longer term it is clear that that the Local Plan process will need to take on board the requirement for a further increase in retail floorspace, and we would expect that exercise to include the emerging requirement for a modest size supermarket by 2031.

Great Dunmow

6.113 There is no requirement in the immediate future for a supermarket in Great Dunmow, although we favour the introduction of a new operator in place of an expansion of the Tesco's offer.

6.114 The Council depot / former sorting office site may provide the opportunity for introducing a supermarket adjacent to the town centre.

6.115 The shopping analysis suggests that towards the end of the plan period there could be a requirement or a small supermarket or discount store which would contribute to maintaining expenditure retention in the area. The civic amenity / Smiths Farm site could potentially meet this need, but we consider such a proposal should be evaluated within the context of the emerging LDF strategy.

Retail Warehouse Provision

Operational Considerations

6.116 The display and purchase of certain types of merchandise requires a large floorspace format. Known as "bulky goods", they comprise large and heavy products and the most notable examples are within the DIY, furniture / carpets and electrical goods sectors.

6.117 Not all the goods are bulky or require extensive floorspace. Some furniture products and a considerable proportion of electrical goods are comparatively small scale and can be readily accommodated in conventional unit shops. By contrast, DIY products are generally larger in scale and, as importantly, often attract a considerable number of different types of purchases on the same visit: without offering an extensive range of products, the attraction of such a store would be much diminished. The majority of DIY expenditure falls into this category. The consequence of these patterns is that a proportion of the expenditure in these sectors finds its way into town centre shops with the larger products being accommodated in retail warehouses. On the ground, the offer in the retail warehouse is less demarcated.

6.118 Because of their format, it is unusual to find such a large store within or on the edge of a centre, and most are located outside the town centre. Many are stand alone, particularly DIY stores, but the benefits of trading as a complex, especially as collectively they offer the customer a "home improvement" service, means that the most successful provision is in a warehouse park format.

6.119 Predictably, they tend to be located where there is sufficient spending power in an area to support the particular retail warehouse. As they are very much self-contained in terms of their offer and unlike town centre traders do not need the presence of other outlets to provide customers with extensive choice, they are far less dependent upon an extensive support population. They are, therefore, found in both the large centres of population and the smaller settlements with a critical level of expenditure.

6.120 The pattern of provision in the Uttlesford area broadly accords with this analysis. There are major retail warehouse park facilities in Cambridge, Bishops Stortford and Chelmsford which the review of expenditure flows in Section 4 illustrates, draw significant trade out of the Study Area. More limited provision is located in Haverhill and Braintree which also attract significant expenditure away from the Uttlesford area.

6.121 There is no retail warehouse provision within the Uttlesford district except for two DIY outlets – the Homebase and Ridgeons in Saffron Walden. Our own surveys indicated that neither stores were trading particularly well as a result we have make an adjustment to their benchmark turnovers.

Locational Strategy

6.122 These considerations clearly demonstrate that there is an apparent unjustifiable shortfall in the provision of warehouse facilities in the Uttlesford area. The support population is, at times, making long distance journeys to meet their requirements for this type of shopping although, in part, their needs are being met by facilities closer to home in Haverhill and Braintree. The residents in Zone 3 are within a reasonable travelling distance of the retail warehouse parks in Bishops Stortford and Harlow. Table 4f (Appendix 6b) records that expenditure upon bulky goods in the Study Area at 2011 amounted to £14.13 mpa and approximately 88% of this is attributable to the sales generated by the population in Zones 1 and 2.

6.123 Apart from the general analysis of retail planning need, advice from the marketing agents is that there is considerable demand from retail warehouse operators for facilities in the Uttlesford area, and they further suggest that, because of the concentration of population – Zone 1 accounts for about half the population in the Study Area – the market would seek to meet floorspace provision in Saffron Walden, which is the focus of that potential expenditure. It is relevant to note that planning permission was granted for a retail warehouse park on a site in Thaxted Road for a scheme comprising 3,058 m^2 gross of retail warehousing in September 2007 and a subsequent has been granted more recently in September 2013 that comprises a discount foodstore and retail warehousing of 2843 m^2 net.

6.124 Sustainable planning objectives would be achieved if retail warehouse provision was made locally by permitting local residents to access facilities nearby rather than travelling to more distant facilities.

Floorspace Need

6.125 The preliminary broad brush analysis of the location of retail warehouse facilities suggests they are heavily influenced by the proximity and scale of the support population rather than extent of choice. This profile has been employed to broadly gauge the likely attraction of retail warehouse development in Saffron Walden to the population in the various parts of the Study Area, also taking into consideration the existing retail warehouse facilities. We have used the three zones employed in the household survey as the basis of this exercise.

6.126 We consider it realistic to gauge the catchment as follows:-

- That the proximity of Bishops Stortford and Chelmsford would ensure retention of the greater part of the expenditure from Zone 3 into those facilities. Given the proximity of the northern sector of the zone to Saffron Walden we have assumed 10% of such sales could potentially be drawn from this area.

- That Zone 1 would continue to experience some loss of retail warehouse expenditure to the Cambridge retail warehouse parks and that the facilities in Haverhill would maintain a limited draw upon the zone, given proximity. We conclude that 80% of retail warehouse sales could realistically be reclaimed within the zone.
- Given that parts of Zone 2 are more readily accessible to facilities in Chelmsford, Braintree and to a lesser extent Bishops Stortford, we conclude that no more than 50% of such expenditure could to be attracted to Saffron Walden.

6.127 Tables 8a and 8b (Appendix 6b) shows the extent of bulky goods expenditure currently entering retail warehouse outlets from the three zones, and the application of the above percentages suggests that the potential sales of bulky goods sales available to a retail warehouse development in Saffron Walden is of the order of £9.48 mpa in 2011.

6.128 Using an appropriate benchmark multiplier, we have estimated that the existing Homebase and Ridgeons DIY stores account for some £2.37 mpa of turnover. The resultant surplus of £7.11 mpa is available to retail warehouse floorspace, in the main electrical and furniture / carpet traders.

6.129 Adopting a composite benchmark turnover of £3,250 m^2 the equivalent floorspace requirement in 2011 amounts to 2186 m^2.

6.130 The increase in retail warehouse floorspace requirements over the plan period amounts to 2,697 m^2 sales in 2016, 3,436 m^2 sales in 2021, 4,097 m^2 sales in 2026 and 5,080 m^2 in 2031. It assumes the same growth in expenditure as for comparison goods, and makes similar allowances for increasing floorspace efficiency.

6.131 Allowing for possible requirements from such traders as toy, pet, motor accessories and mail order retail warehouse operators, we consider the strategy should plan for some 13,000 m^2 of comparison retail floorspace by 2031.

6.132 This exercise does not purport to be other than a broad assessment of need as indicated by retail planning and marketing considerations and the likelihood of such expenditure being retained and retrieved in various sectors of the Study Area to support provision in Saffron Walden.

Service Floorspace

6.133 An integral part of any shopping centre is its service facilities, ranging from restaurants and cafes through to banks, other financial services and estate agents. Some of these activities, in particular the banks, post office, restaurants and cafes have a strong functional link with the shopping expedition, whereas others, such as estate agents and insurance offices, have a far more tenuous relationship with the visit to a centre to meet shopping needs. In relation to the former categories they very often form part of the shopping expedition and their presence assists in contributing to the retail attraction and functioning of a centre. A retail capacity exercise must necessarily take into consideration the requirements of this sector.

6.134 The household survey revealed that services contributed substantially to the attraction of the centres – some more than others – and the data also illustrated that customers undertaking shopping expeditions combine their trips with visits to service outlets. However, the survey did not provide any information which could contribute to a quantitative assessment of floorspace requirements.

6.135 In order to produce a broad indication of service floorspace needs the Study has undertaken an examination of the interrelationship between retail and service floorspace in each of the centres. The analysis has been conducted in terms of comparison floorspace. Main food shopping tends to be more of a self-contained expedition associated with a requirement to return the goods to home as quickly as possible. By contrast the trip for comparison goods is less constrained and provides greater opportunity for also embarking upon visits to service outlets.

6.136 The assumption has been made that the comparative relationship between the comparison floorspace and the service floorspace is a reflection, albeit an approximate one, between the relative usage and, therefore, need for the two types of facility. Accordingly, the following quantitative assessment is based upon this functional relationship.

6.137 The methodology employed is, firstly, to identify the extent of comparison and service floorspace in the various centres as at 2011 assuming that, at that date, the relationship is in balance. The growth in comparison shopping requirements is then assessed over the plan period, and this profile used to calculate the service floorspace need to the end of the plan period in 2031.

6.138 The interrelationship is not a straightforward one in that the projected increase in retail floorspace in the various centres is an amalgam of increases in the town centre and facilities within the town but outside the centre. Whilst there is bound to be some linkage between out of centre facilities and the town centre, it is unlikely to be as strong as between shopping and service units in the centre. That disassociation may imply service expenditure leaking to more distant centres. In order to reflect these different circumstances, different multipliers are used in assessing the services need generated by in centre and out of centre comparison floorspace. To assist clarity, the comparison floorspace inputs employ the in centre and out of centre comparison turnovers derived from Tables 5b, 6 and 7.

6.139 The application of the approach produces different results for the main centres.

Saffron Walden

6.140 In 2010 the service floorspace in Saffron Walden town centre was 5,693 m^2 net compared with comparison sales floorspace of 8,912 m^2. Over the period to 2031 the potential increase in comparison turnover entering the town rises from £42.76 mpa to £112.52 mpa (see Table 5). Of that total, town centre trade accounts for an increase from £38.91 mpa to £86.69 mpa.

6.141 In order to reflect the retained service expenditure it has been assumed that this is a direct correlation between the growth in town centre turnover and service floorspace, but a reduced one in respect of out of centre comparison facilities.

Comparison Turnover Change

IN CENTRE		
2011 £mpa	**2031 £mpa**	**Change £mpa**
38.91	86.59	+47.78
OUT OF CENTRE		
3.85	25.83	(at 50%) +10.99
	INCREASE:	**+58.77**

6.142 The increase of £58.77 mpa is treated as the growth factor for related town centre service floorspace. It represents a 137% increase from 2011 and as applied to the 5,693 m^2 of service floorspace suggests an increase for such town centre floorspace be an additional 7,824 m^2 sales area.

Great Dunmow

6.143 The service floorspace in Great Dunmow in 2010 amounted to 2,341 m^2 compared with a comparison area of 2,021 m^2 sales. Over the period to 2031 the potential increase in comparison sales entering the town is expected to rise from £8.41 mpa to £22.13 mpa (see Table 6). Of that total the town centre's trade accounts for a change of £6.9 mpa to £14.44 mpa.

6.144 In order to reflect the retained service expenditure a similar exercise has been undertaken with differential multipliers attached to the town centre and out of centre comparison turnover.

Comparison Turnover Change

IN CENTRE		
2011 £mpa	**2031 £mpa**	**Change £mpa**
6.90	14.44	7.54
OUT OF CENTRE		
1.51	7.69	(at 50%) +3.09
	INCREASE:	**+10.63**

6.145 The increase represents an 125% uplift between 2011 and 2031 and is regarded as a proxy for related town centre service floorspace. As applied to the service floorspace of 2,341 m^2 it anticipates a requirement of an additional 2,927 m^2 of floorspace over the plan period.

Stansted Mountfitchet

6.146 The additional service provision for Stansted Mountfitchet can be directly related to the increase in comparison turnover / floorspace as all the uplift in retail floorspace is anticipated to take place in the centre.

6.147 The increase in comparison turnover over the plan period is 152% (see Table 7) and as applied to the service floorspace at 2011 of 1,384 m^2 would justify further service floorspace of 2,107 m^2.

Thaxted

6.148 The increase in comparison sales are such as to suggest a very limited requirement for additional service floorspace.

Summary

6.149 Given the nature of the calculation the forecasts can only be regarded as broad brush indications of the growth in service floorspace requirements. Of equal importance in terms of identifying area is the ability of many service activities to successfully occupy other than ground floor retail accommodation and one would expect a substantial proportion of the calculated need to be housed on upper floors, to the rear of premises, or occupy fringe central area locations.

7.0 ACCOMMODATING THE RETAIL REQUIREMENTS

7.1 The quantitative and qualitative analyses of retail floorspace requirements over the period to 2031 have identified a range of different types of accommodation in various locations. Given the imprecise nature of shopping capacity studies the floorspace figures should be regarded as approximate guide and not specific targets. The retail market will be an important influence in determining actual figures and the nature of the accommodation to meet requirements. In summary the significant additional requirements are:-

Centres	**Sales Area m^2**
Saffron Walden	
Comparison Sales	6,392
Convenience Sales	1,553 – 2,630
Service Sales	7,824
Retail Warehousing	5,080
Great Dunmow	
Comparison Sales	1565[1]
Convenience Sales	807-1366[2]
Service Sales	2,927
Stansted Mountfitchet	
Comparison Sales	739
Convenience Sales	697 – 1181
Service Sales	2107

7.2 The previous Table has identified the broad extent of retail facilities required to meet the demands of Uttlesford District over the Local Plan period to 2031. The Council will be embarking upon exercises to establish how they might accommodate the facilities and this Section of the report is devoted to a broad brush appreciation of the nature of the shopping facilities which might meet those demands, their location and the appropriate time period. Unlike our earlier report we do not attempt to identify specific development sites and their ability to accommodate those facilities.

7.3 It probably assists understanding if our review examines the shopping needs upon the basis of the three areas used in the study.

Saffron Walden

Comparison Good Facilities

7.4 The study has concluded that Zone 1 of the Uttlesford survey area, centred on Saffron Walden, will generate a requirement for 6,392 m sq of net additional floor space by 2031. That figure represents the totality of comparison expenditure likely to be attracted into Zone 1 from the whole of the study area and unsurprisingly by far the great majority is derived from Zone 1. As by far the most important centre, the requirement is focussed on Saffron Walden.

7.5 The need for additional floorspace begins to make itself felt towards the end of the decade and rises comparatively quickly from 652 m sq net in 2021 to the 6,392 m sq net in 2031.

7.6 Given the results of the Household Survey, and their employment in the analysis of need, it is anticipated that by far the greater proportion of floorspace will be in the nature of town centre facilities, although an element might be taken up by additional comparison shops in local centres. The provision of the floorspace should, therefore, be directed to developments within / extensions to the central shopping area of Saffron Walden town centre.

Convenience Goods Facilities

7.7 The study reveals that substantial additional convenience floorspace facilities will be required by 2031. As with the comparison expenditure this begins to manifest itself towards the end of the decade, with supermarket floorspace need defined as between 561 sq m net and 949 sq m net in 2021, rising to between 1,553 sq m net and 2,630 sq m net in 2031.

7.8 The figures are expressed either in terms of the required capacity assuming it is all directed to a store operated by one of the main supermarket traders, or in the alternative by discount supermarket operation.

7.9 It is not anticipated that the provision will be either one or other form. In retail planning terms the provision of additional facilities should reflect any shortfall prevailing at the time. The supermarket offer in 2031 is likely to be the extended Waitrose store in the town centre, the extended Tesco outlet and the discount store for which planning consent has recently been granted on Thaxted Road. In order to provide a wide choice of facilities the additional floorspace might be in the form of a large supermarket or a somewhat smaller unit and an additional discount unit. Whilst the floorspace capacity exercise can offer a guide to the nature of the additional outlets, the determination of this issue should be heavily influenced by demand expressed through the retail market.

7.10 The Household Survey demonstrated the focus of such facilities in Saffron Walden and demonstrated the desirability of focussing such facilities in Saffron Walden and we consider any additional outlets should be located within the town.

7.11 A separate exercise explored the need for top-up expenditure into smaller units. A considerable proportion of expenditure leaks to more distant centres and the amount of trade retained is very limited in the early stages of the plan period, rising to 291 m sq net in 2021 and 622 m sq net in 2031. We would expect this provision to be scattered over a wide range of small centres, e.g. villages within Zone 1 as market demand manifests itself.

<u>Service Facilities</u>

7.12 Service facilities comprise an extensive range of trading types, including banks, insurance outlets, opticians, post offices, estate agents, pubs, cafes and restaurants. The study has not sought to distinguish between the very needs of those sectors but to assess a global requirement using a broad brush relationship between service and comparison goods floorspace. The growth in service facilities is, therefore, aligned with comparison floorspace growth.

7.13 It is assumed as at 2011 the need and supply is equilibrium. Over the period to 2031, the floorspace requirement is calculated to rise by 7,824 sq m net, at a progression over the period reflecting the growth in comparison floorspace.

7.14 The greater part of this requirement is expected to take place in Saffron Walden town centre, especially those services having a strong operational link with the shopping expedition, such as restaurants and banking. Activities like estate agents and insurance brokers are less dependant upon association with shopping and might well be located outside the defined central area. For similar reasons many of those service uses may well be satisfactorily accommodated in 'backroom' locations or on upper floors of premises.

7.15 In the light of these considerations we are of the view the allocation of service floorspace will in part be in association with retail scheme proposals with a balance being maintained between retail and service frontages. More peripheral developments may have a preponderance of service activities.

Great Dunmow

Comparison Goods Facilities

7.16 The study has demonstrated that the proportion of comparison trade from the study area drawn into Zone 2, based upon Great Dunmow in 2011, is a very modest 2.36%, equivalent to expenditure of £8.41 mpa. Given the retail nature of the centre and the results of the Shopper Survey, we consider it most unlikely that there will be an increase in this retention rate.

7.17 The study anticipates no additional comparison floorspace being required at 2011 and because of commitments, negative requirements at 2016 and 2021. A need of 702 m sq net emerges in 2026 rising to 1,565 m sq net in 2031. We would expect that floorspace to be very largely confined to development within or adjacent to the central shopping area.

Convenience Good Facilities

7.18 Zone 2, based upon Great Dunmow, attracts just over 50% of convenience sales from the study almost entirely derived from Zone 2 expenditure. Nearly all of such trade is accounted for by the out-of-centre Tesco store. The Co-op store attracts under 4% of Zone 2 expenditure.

7.19 As at 2011, it is calculated that there is a requirement for between 268 m sq net and 454 m sq net of additional convenience floorspace, rising steadily to between 807 sq m net and 1,366 sq m net in 2031.

7.20 The former figure is representative of a small supermarket operated by one of the main operators .... the smaller area equivalent a discount store. We take the view that the Co-op might be regarded as a proxy for a discount store and that in order to remedy, at least in part, the substantial leakage of such expenditure to more distant facilities an additional small supermarket would be justified within the plan period. Market evidence will be important in deciding retail strategy.

7.21 The assessment of the need for top-up shopping facilities revealed no requirement at 2011, rising to 475 m sq net in 2031. Such facilities will be located in the smaller settlements within Zone 2 and will take the view that these figures should be regarded as a guide and greater reliance placed upon market demand.

Service Facilities

7.22 The same methodology as previously described has been employed in assessing service floorspace requirements in Great Dunmow. That exercise demonstrates that service provision should rise from 2,341 m sq in 2011 to 5,268 m sq in 2031. An increase of 2,927 m sq net. The rate of growth would broadly follow that of comparison shopping floorspace.

7.23 Our view is that by far the greater proportion of this floorspace should be directed into or adjacent to Great Dunmow town centre. Those uses often fall in part of the shopping expedition – cafes, restaurants, banks, hairdressers – would be expected to be located within the shopping frontages. In primary shopping frontages, consideration will need to be given to an appropriate balance between retail of service activities. The service uses having a less direct relationship with the shopping expedition, such as insurance brokers and employment agencies might readily occupy non retail backroom or upper floor accommodation.

Stansted Mountfitchet

Comparison Goods Facilities

7.24 Stanstead Mountfitchet is a large village and it is, therefore, unsurprising that it attracts less than 1% of expenditure from the study area. This limited influence is most unlikely to change.

7.25 Over the period to 2031, the requirement for additional comparison floorspace rises slowly to 739 m sq net in 2031, equivalent to a number of shop units. We would expect these to occupy a location within the centre.

Convenience Goods Facilities

7.26 The supermarket representation within Zone 3 is confined to a number of small stores in Stanstead Mountfitchet and other villages and the trade retained by these facilities and other shops is about 6% of total convenience expenditure. All of these sales are top-up in nature.

7.27 The pattern of trade is heavily dictated by the presence of Bishops Stortford with its many supermarkets and, to a lesser extent, Harlow which between them attract over 75% of sales. However, Stanstead Mountfitchet and its immediate hinterland has a population of about 7,000 persons and that degree of spending power leads us to conclude that a proportion of sales – 60% - might be retained by a modest size supermarket. The study calculated a provision of between 697 m sq net and 1,181 m sq net which could justify a medium size store. The market evidence should be the main determinate of the nature and scale of the outlet.

Retail Warehouse Facilities

7.28 An assessment was undertaken relating to the study area as a whole, a different set of assumptions employed as to the degree to which expenditure could be retained within the three Zones comprising the study area. The trading sectors were based upon the most common of the retail operations – DIY, furniture and electrical. The results showed a requirement for some 2,186 m sq net of floorspace in 2011, rising to 5,080 m sq net in 2031.

7.29 Advice from the marketing agents involved in the analyses is that Saffron Walden is the only centre with the market credentials to attract the retail warehouse operators. We would expect provision to be made on a site within or on the fringes of the town with good road access to the study area.

8.0 MONITORING

8.1 The shopping study embraces a lengthy period which implies that many of the assumptions relating to retail expenditure and shopping behaviour could well experience significant departures from those inputs. The current recession and the immediate future have been and are likely to be particularly volatile periods. Accordingly, we would recommend the underlying retail data is examined annually over the next five years to ensure that the basic conclusions of the study maintain their integrity. Thereafter, the study should be reassessed every five years particularly in relation to the post 2021 period where current forecasts should be treated as estimates rather than precise requirements.

8.2 The lack of sufficient sites to meet the retail floorspace requirements demands a continuous research programme to identify locations appropriate to the particular shopping facility and in accordance with policy.