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Uttlesford
District Council

Chief Executive: Peter Holt

Local Plan Leadership Group
Remote Meeting

Date: Wednesday, 9th February, 2022

Time: 7.00 pm

Venue: Zoom

Chair: Councillor G Bagnall
Members: Councillors M Caton, R Freeman, M Lemon, B Light, J Lodge, S Merifield, R Pavitt (Vice-Chair), N Reeve, M Sutton and M Tayler

Public Participation

At the start of the meeting there will be an opportunity for up to 10 members of the public to ask questions and make statements subject to having given notice by 2pm the working day before the meeting. Each speaker will have 4 minutes to make their statement. Please write to committee@uttlesford.gov.uk to register your intention to speak with Democratic Services.

Public speakers will be offered the opportunity for an officer to read out their questions or statement at the meeting, or to attend the meeting over Zoom to readout their questions or statement themselves

Members of the public who would like to watch the meeting live can do so here. The broadcast will be made available as soon as the meeting begins.

AGENDA
PART 1

Open to Public and Press

For information about this meeting please contact Democratic Services
Telephone: 01799 510369, 510548, 510410 or 510467
Email: Committee@uttlesford.gov.uk

General Enquiries
Council Offices, London Road, Saffron Walden, CB11 4ER
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Website: www.uttlesford.gov.uk

LOCAL PLAN LEADERSHIP GROUP held at ZOOM, on MONDAY, 29 NOVEMBER 2021 at 7.00 pm

Present:	Councillor G Bagnall (Chair) Councillors M Caton, R Freeman, P Lees, M Lemon, B Light, S Merifield, R Pavitt (Vice-Chair), N Reeve, M Sutton and M Tayler
Guest (non-voting):	Councillor J Evans
Officers in attendance:	T Coleman (Interim Director of Planning and Buiding Control), C Edwards (Democratic Services Officer), J Hill (Planning Policy Officer), S Miles (Local Plans and New Communities Manager) and L Mills (New Communities Senior Planning Officer)

Also present: M Kingham, J Chillingworth and K Davies

Public speakers: A Dodsley and R Haynes.

1 **APOLOGIES FOR ABSENCE AND DECLARATIONS OF INTEREST**

There were no apologies for absence or declarations of interest.

2 **MINUTES OF THE PREVIOUS MEETING**

The minutes of the meeting held on 28 October 2021 were approved.

3 **PUBLIC SPEAKERS**

Andy Dodsley spoke about the Landscape Sensitivity report. He had some questions about Easton Park and whether a listed building and a heritage asset needed to be added to the assessment. He also had concerns about the former Dunmow Airfield and Highwood Quarry in terms of intervisibility and a missing reference to the Local Wildlife Site, register reference ufd 194.

He asked for clarification from Officers regarding the drawn potential settlement boundary on page 17 of Appendix C.

The Chair thanked the speaker and said that the questions raised would be addressed fully at a later date.

The Local Plans and New Communities Manager said that the boundary drawn in the assessment of the landscape phase 2 work did not match the proposed sites and was determined with the Consultant taking into account the landscape in conjunction with the sites put forward. He also clarified that large sites had been grouped when they were in close proximity, and this was for ease of working and did not mean one or both would necessarily be chosen.

Richard Haynes spoke about the landscape study carried out by LUC and the Oxford Archaeology study on heritage. He was concerned that these were not effective as a tool to determine appropriate areas for development. The LUC had said that there would be no assessment of views which would be devasting for places like Thaxted. He said the Oxford Archaeology study did not consider the setting of heritage assets.

He said that neighbourhood plans needed to be considered in the technical assessments as well as the Local Plan from 2005.

The Local Plans and New Communities Manager said he would go back to the consultants and would consider the points made.

The New Communities Senior Planning Officer said that the neighbourhood plans would be considered in the broader site assessments.

4 **UTTLESFORD EMPLOYMENT NEEDS & ECONOMIC DEVELOPMENT EVIDENCE**

The Planning Policy Officer said that the report looked at the economic growth and employment need of the district, and that it followed on from 3 working papers presented earlier in the year. She said it looked at the employment structure of the district, a commercial market review, a business survey, the growth of Stansted Airport, the employment land supply and floor space required.

Matt Kingham from Iceni Projects presented the report.

Councillor Caton asked what the skills and income levels would be at the Northside development as he was concerned that although it would provide jobs, the majority of employees would not be able to afford to live in the district. He was concerned about the additional pressure on affordable housing stock.

Mr Kingham said that it was likely to be low skill and low wage jobs with some managerial positions. He said he could circulate income details on projects of a similar style.

Members were concerned about Live/Work spaces as mentioned in the report as these had been unsuccessful in the past.

Mr Kingham said he could provide details of some successful schemes in North London, but agreed to revisit that emphasis in the report.

Councillor Light asked about Chesterford Retail Park (CRP) and the statement made that it was a key economic driver, she thought there was no real evidence behind this. She asked how many local people were employed at CRP and how much it contributed to the local economy.

The Chair asked the Planning Policy Officer to circulate some statistics after the meeting.

Councillor Pavitt said that apart from CRP there was nowhere else in the district that would benefit from the life sciences and bio tech companies' sector. He was concerned that this was because of the Council's interest in the research park.

The Local Plans and New Communities Manager said that CRP had a great deal of capacity for further growth. He said that the companies worked closely together and would benefit from the conglomeration.

The Chair said that the rationale for why other areas were not being considered needed to be clear within the report.

Councillor Reeve said that there was a good argument for start-up hubs to be built throughout the district not only for the life science industry but also for others including the emerging green economy. He said a second CRP should be considered,

In reply to a question from Councillor Reeve, the Local Plan and New Communities Manager said that there would be further work on establishing the need for extra housing in terms of the growth of jobs in the district, but the paper on housing requirements that came to the group in the Spring/Summer did start to cover this.

Councillor Merifield raised the large number of mobile businesses within the report and said if this increased there would be a lot of cars on the road. She said that CRP needed to encourage apprenticeships within the district. She said it was the whole district that was a draw for the visitor economy.

Mr Kingham said there was likely to be more of an emphasis on people working from home within the district which was driven by the pandemic and would be likely to continue and increase. He said that it was a good idea for CRP to link with local schools and Essex universities and the Southeast Local Enterprise Partnership (LEP).

Councillor Sutton said that the majority of jobs that were forecast were likely to be focused on the bigger sites like Stansted Airport and CRP and that should be taken into consideration when deciding where to build new houses.

Councillor Tayler said that more people were building home offices in the garden, and this would continue to increase. He said that the high levels of growth in science and bio tech companies in Cambridge would have an effect on the Uttlesford area and this needed to be considered and the opportunities that this brought to the district recognised.

Councillor Evans said that there was potential for the Northside development to have some scientific workspaces built.

The Planning Policy Officer said that the issue with building science laboratories was the large difference in cost as they would need to be of a high specification and only suitable for certain locations.

The Group noted the report.

5 STRATEGIC FLOOD RISK ASSESSMENT UPDATE

The New Communities Senior Planning Officer said the report had been compiled by consultants JBA and highlighted all types of flood risk throughout the district. This provided evidence to make informed decisions as to where and how developments took place.

Jo Chillingworth from JBA Consultants presented the report. She set out the next steps which involved looking at the flood risk percentages compiled using data from the 'call for sites' boundaries. Once the sites had been shortlisted a decision would be made as to whether a more detailed Level 2 Strategic Flood Risk Assessment (FRA) needed to be carried out.

Councillor Pavitt said the report highlighted the need for policies in order to better understand where the development sites should be situated. He said there was a case for excluding development near main waterways because of flood displacement, to protect the function of rivers to be natures corridor and because of the Council's function as a custodian to protect and restore chalk streams. He said the report focused on enabling development but did not cover these points.

He said that page 280, 5.1 Historical Flooding was missing data he said that this needed to be captured from the Parishes and Members as it was important to have as accurate data as possible.

Ms Chillingworth agreed but said there was more detailed information on historical flooding events in Appendix F.

There was further discussion as the report data in appendix F only went up to 2016 and although further data was awaited from Essex County Council it was agreed that the Parish Councils would be able to provide more information on historical flooding. It was also acknowledged that this would rely on responses from the Parishes and consistency of data provided.

Councillor Pavitt also raised the Cam and Ely Ouse on page 300 which was a duplication of the data above.

He finally asked if the areas in flood zone 3B, functional flood plains had been assessed recently to consider climate change. Ms Chillingworth said that they had been mapped but it was the Council's decision whether to develop on these sites which were not too widespread within Uttlesford's district.

In response to a question from Councillor Merifeld who asked if a policy could be developed in terms of flooding from street drains which were not cleared properly. The Local Plans and New Communities Manager said that a policy could be developed but it would need to be proportionate to the development and could not fix past problems.

The Group noted the report.

6 LANDSCAPE SENSITIVITY - PHASE 2

The Local Plans and New Communities Manager said that the phase 2 report looked at the landscape around new settlements.

Katrina Davies from LUC presented the report. She said the aim of the study was to assess the 12 potential new settlement locations in the context of the rural character of the district on a strategic level. It provided a commentary on the sites without comparing them to each other.

Areas of discussion included: -

- The parcels of land had been submitted by different promotors and were therefore assessed according to what had been submitted.
- The consultants had not been asked to look at other districts.
- Carver Barracks had been included because it was the largest brown field site in the district, there was no indication from the Ministry of Defence that they wanted to sell the land.
- The visual representations did not reflect the differences in topography throughout the district.
- Councillor Caton raised a concern about the inconsistency of sites, for example, at Ugley, which was immediately adjacent to Stansted the coalescence of the site was not being taken into consideration. The Local Plans and New Communities Manager agreed to provide a response after the meeting.
- Councillor Tayler said that the views from the perspective of walkers were important alongside the private views of residents and asked if he could have further discussion with the Local Plans and New Communities Manager and the New Communities Senior Planning Officer, this was agreed.

Councillor Freeman left the meeting at 9:06pm

7 DEVELOPMENT OPTIONS PROCESS

The Local Plans and New Communities Manager presented the report. He said it detailed the next step of the process for identifying development options for appraisal, which was an important stage of the Local Plan process.

He said that therefore the next meeting on the 9th December would be a workshop for evaluation and discussion of the generation of reasonable alternatives. This would be restricted to Local Plan Leadership Group Members. The Chair said he would have discussions after the meeting regarding Members who were unable to attend and wanted to send substitutions.

The meeting ended at 9.21 pm

Agenda Item 3

Committee:	Local Plan Leadership Group	**Date:**
Title:	National Farmers Union – Agricultural issues to consider for the Local Plan	Wednesday 9 February 2022
Report Author:	Joanna Hill, Planning Policy Officer jhill@uttlesford.gov.uk	

Summary

1. Rob Wise, Environment Adviser of National Farmers Union (NFU) East Anglia has been invited to present to the LPLG on agricultural issues for consideration in the Local Plan.

Recommendations

2. To reflect on agricultural issues that require policy development in the emerging Local Plan.

Financial Implications

3. The approved budget for the Local Plan in 2021-22 includes sufficient provision for the work needed through to the end of March 2022.

Background Papers

4. The following briefing documents on the Levelling up and working towards net zero are appended:
   - Levelling up rural Britain (NFU)
   - Net Zero & Agriculture – A guide for Local Authorities (click on the pages for further details on each topic)

Impact

5.

Communication/Consultation	N/a
Community Safety	N/a
Equalities	Forthcoming policies will be subject to an Equalities and Healthy Impact Assessment (EqHIA).
Health and Safety	N/a
Human Rights/Legal	Preparation of a local plan is a statutory

Implications	duty. It needs to meet legal tests and comply with regulations.
Sustainability	Forthcoming policies will need to meet the sustainability objectives of the Council and the Local Plan will be subject to a Sustainability Appraisal.
Ward-specific impacts	All
Workforce/Workplace	N/a

Situation

6. 97% of the district is agricultural land, mostly arable. 379 holdings farm 51,152 hectares employing 988 people [Defra 2016]. There is a need to understand how changes to the Environment Bill and agricultural diversification will impact Uttlesford; and how to address agriculture in policy terms in the emerging Local Plan.
7. The Department for Environment, Food & Rural Affairs (DEFRA) are responsible for improving and protecting the environment. Their aim is to grow a green economy; sustain thriving rural communities; and support our world-leading food, farming and fishing industries. There is a need to consider how planning policies can support changes in Agriculture.

Risk Analysis

8.

Risk	Likelihood	Impact	Mitigating actions
That legislative changes in agriculture are not ready on time to inform the reg 18 Local Plan	3	That legislative changes in agriculture are not taken into account in the reg 18 Local Plan	Ensure consideration and engagement on agricultural issues as a strand of work in Local Plan preparation

1 = Little or no risk or impact
2 = Some risk or impact – action may be necessary.
3 = Significant risk or impact – action required
4 = Near certainty of risk occurring, catastrophic effect or failure of project.

NET ZERO & agriculture

A guide for local authorities

NFU

NFU SUPPORTED BY NFU Mutual

Working together **to achieve Net Zero**

Farmers and growers are central to a zero carbon economy.

We ask that local authorities work with farmers and growers, to include the measures outlined here in their Climate Change Emergency plans, local plans, economic development strategies, own procurement strategies and how they develop funding bids with LEPs.

National predictions are for the low carbon economy to grow four times faster than the rest of the economy. Farmers and the land they manage can play a part in this clean growth through decarbonising agricultural production, as well as delivering products and services which replace fossil fuels and remove or store carbon.

The NFU is committed to achieving net zero agriculture by 2040. The UK can enhance its status as a world leader in climate-friendly food production, ensuring a sustainable food supply within the UK, and at the same time strengthening the economy. To do this agriculture needs the support of all policymakers to provide an enabling environment in which farms can provide GHG mitigation and other services.

Our aim is for a productive, profitable and sustainable agriculture sector, with skilled, capable and innovative farmers accelerating our national transition to a net zero economy.

Stuart

**Stuart Roberts,
Deputy President NFU**

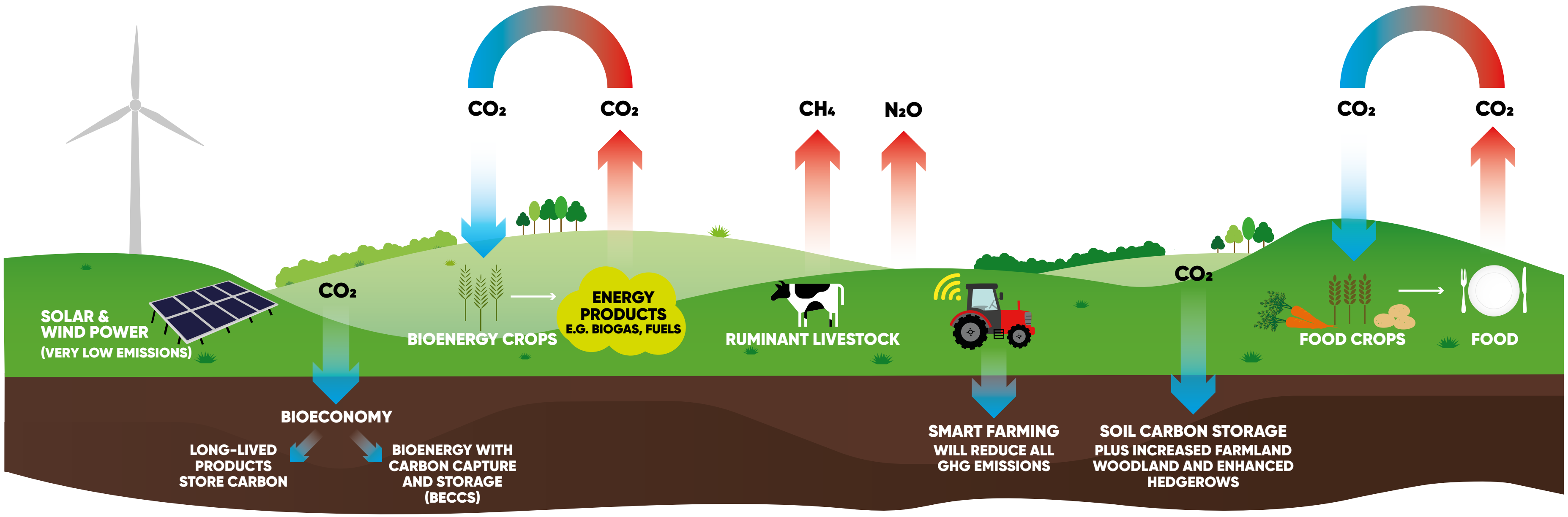
Part of the solution

Agriculture is uniquely placed as both the source of 10% of UK emissions as well as a sink. Farming captures carbon dioxide (CO2) from the air and turns it into a wide range of foods, fibres, and fuels. By capturing and storing carbon, we can generate negative emissions – actively removing CO2 from the atmosphere to balance the CH4 and N2O emissions from food production. Farmers also manage substantial carbon reserves already present in soils and vegetation.

Local authorities

Local authorities have an essential role in supporting agriculture with strategic policies for clean growth in the rural economy. An agile planning approach linked to funding opportunities will help farmers and growers plan, innovate and deliver a net zero future.

Helpful resources



The NFU's net zero aspiration in three pillars:

Pillar 1

Boosting productivity to reduce emissions:

Improving farming's productive efficiency will enable farmers to produce the same quantity of food, or more, with less inputs, in smarter ways. This, in turn, will reduce greenhouse gas emissions.

Pillar 2

Storing of carbon on farmland:

By conserving what's already there and changing land management and use we can capture more carbon – in soils, bigger hedgerows and trees.

Pillar 3

Renewables and the bioeconomy:

To displace greenhouse gas emissions from fossil fuels and to create GHG removal through photosynthesis and carbon capture.

PILLAR 1 Reducing emissions through productivity

Actions for net zero and where the Local Authority can help

- Reduce emissions in the food chain
- Increase efficiency with farm building modernisation
- Digitalisation
- Transport infrastructure
- Invest in technologies and best practice
- Research and development

Click the links to find out more...

Agriculture
£10.4bn
bedrock of food and drink sector
£121bn to UK economy

£261bn
rural economy
3.6m employees, 550,000 registered rural businesses (549,000 are SMEs)

PILLAR 2 Carbon storage

Actions for net zero and where the Local Authority can help

- Managing and planting trees and hedgerows
- Carbon trading and offset

Click the links to find out more...

65% of UK farmland is best suited for growing grass for animals to eat

71% of the UK land area is managed by the agricultural sector

PILLAR 3 Renewables and the bioeconomy

Actions for net zero and where the Local Authority can help

Clean energy

Bio-based products

District heating

Click the links to find out more...

65% of farm businesses have diversified

Around **1/3** of farms have solar energy (rooftop or ground-mounted)

Local solutions for a green recovery

The agricultural sector is facing change from every side driven by forthcoming changes in the post-Brexit policy and support environment for the industry, disruption in the food and drink marketplace, the accelerating pace of technology development, the fallout of COVID-19 and climate change.

A green recovery should be through place-based actions, addressing climate change at the same time as levelling-up inequalities across regions with innovative thinking to scale solutions. Food production is essential to the local and national economy and must be the focus of supportive policies.

A new funding environment

The phase out of the European Common Agricultural Policy (CAP) from this year, including the direct payment to farmers will mean on average, approximately 60% of the total farm business income will be lost by the end of the agricultural transition. This will restrict cash flow as well as opportunities for investment in net zero measures. Previous forms of rural development funding such as LEADER and EFRD have been phased out, and new forms of rural development funding are uncertain but likely to be linked to the Local Industrial Strategies administered through LEPs. To address this, **funding for agricultural and rural projects needs to be ring-fenced and maintained at least at existing levels**, or we need proportionate funding to be made available to rural areas. There needs to be a legally binding guarantee that rural communities and farms will get their fair share of funding. LEPs have an obligation to deliver the UK Industrial Strategy which is about maximising UK productivity in cities, towns, and rural areas through the distinctive strengths of each area. To achieve this, funding must reach rural areas. The rural economy is rich and diverse but cannot flourish without sufficient resource investment.

Farmers and land managers will continue to need access to capital funding and grant aid to secure business change. In the longer term, private capital investment may become available for carbon credits and offsetting. Existing forms of economic activity within each local authority area will need to find mechanisms to offset and reduce carbon.

The main replacement scheme, Environmental Land Management Scheme (E.L.M.s), from 2024, will provide public money for public goods. E.L.M.s is still in development. Until the scheme detail is available it remains unclear whether E.L.M.s will be accessible to farmers to support a reduction in their GHG footprint.

Skills and training

We estimate that agricultural emissions can be reduced by approximately 25% through introducing better agronomic practices. To do this, new technology and new skills are needed in the rural economy.

But farmers are busy people and may find it difficult to access training and business change advice. Where some colleges provide relevant training, this can be expensive and hard to reach from remote rural locations. Most farmers tend to develop an understanding about new ideas from their friends, family, peers, trusted advisers and any clusters or groups that they are involved with. They also attend agricultural events to learn about new technology and new opportunities.

There are many ways local authorities can support farmers and growers:

- Support net zero champions in your local authority area – farmers and advisers – who can build consensus around low carbon and net zero approaches.
- Work in partnership with existing training providers to create training and educational opportunities for existing rural businesses.
- Hold and support farmer focused events to share knowledge, understanding and local buy-in for new technologies and new ways of working.
- Fund and promote demonstration sites and initiatives throughout your local authority area.

Tourism

Domestic tourism has the potential to increase as people take fewer international flights and focus on domestic holidays. In 2017, the UK received **31 million** visits from international visitors, while almost **47 million British citizens** went abroad for their holiday. If more people remain in the UK for holidays, the benefit to rural areas would be greatly felt through tourism and increased purchasing of local goods and foods, and reduction in GHG contributions from planes. In 2017, there were **433m day trips** to the British countryside, worth £11.7bn to the rural economy. Farming and land management provide the iconic British countryside which tourists enjoy.

Progress together

We have an unprecedented chance to embrace a green recovery to ensure the best transition to a net zero economy. There are ample localised opportunities for rural communities and farmers which will need mechanisms in place to level up.

NET ZERO
& agriculture

A guide for local authorities

For further enquiries: netzero@nfu.org.uk

National Farmers Union
NFU HQ, Agriculture House,
Stoneleigh Park, Stoneleigh,
Warwickshire, CV8 2TZ.

www.nfuonline.com

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Levelling up rural Britain

NFU SUPPORTED BY NFU Mutual

Introduction

If 2020 signalled the start of great change, 2021 offers us all – every part of the country, every community, every person – the chance to level up our country and ensure we build back better. We now have the opportunity to work together to create a new vision for the future of Britain that values and involves everybody, wherever they live.

Rural Britain – and the farm businesses that lie at its heart – has a crucial role to play in developing, implementing and making a success of the new green agenda. There are huge opportunities in rural areas to create jobs; to generate green economic growth; to showcase "Brand Britain" on the world stage through increased exports; and to improve the health and wellbeing of the entire nation.

We are embarking on a new era for farming following the passing into law of the Agriculture Act last year. COVID-19 has shone the brightest of lights on what we as a country have to offer as a food-producing nation and the importance of rural Britain. Farmers and growers were proud to be part of the key workforce, providing food for the nation and helping ensure that shelves remained stocked, and it was fantastic to see the British public respond so supportively to our efforts.

In a survey by OnePoll, 86% of people said they believed British farms should grow as much food as they can to provide national food security. Currently, our self-sufficiency in food production is at 64%. The same survey also showed public support for British farming is at an all-time high.

The food we produce is some of the highest quality in the world. We have seen a significant commitment to short, safe, secure farm-to-fork supply chains which, for 20 years, have been independently audited by Red Tractor Assurance – delivering, in the words of Professor Chris Elliott, the founder of the Institute for Global Food Security, one of the safest food systems in the world. Yet, remarkably, our food is also among the most affordable in the world.

In the eyes of other agricultural exporting countries, the UK is globally renowned for being one of the most prized food markets on the planet. This is reflected in the fact that, in 2019, total foreign direct investment in UK agriculture, forestry and fishing stood at £1.65 billion. And the central reason for this is the quality raw ingredients of our food are produced here and the high value market we provide for.

We want British agriculture to be the number one supplier of choice to shoppers in the UK and across the world. To achieve this, we stand ready to partner with government to build the British food brand at home and abroad and to ensure that, wherever possible, our schools, hospitals and military have access to fresh, high quality British food.

More than any other sector on earth, agriculture has the opportunity to help bring greater changes to everyday life beyond producing the food we eat more sustainably. Natural fibres like wool can be used for a range of things, from insulating homes and buildings to replacing the plastic guards used to protect young trees; tomatoes are now being packed using the vine they are grown on, removing the need for any other packaging; new opportunities are being created through home grown and produced proteins for animal feed. Through investment and innovation, we can improve our food resilience at home and play a leading part in a revolution of sustainable food around the world.

With the hosting of the COP26 climate change summit in Glasgow later this year, we must grasp the opportunity for the UK to lead a global recovery – to be at the forefront of a race to the top on food standards, animal welfare, environmental protection and food safety. An integrated approach to water management is crucial, so droughts and floods are not treated as separate issues. This work can be driven by new technologies and innovation that can pioneer policies on how to produce carbon neutral food.

In 2019 the NFU set an ambition for British agriculture to achieve net zero greenhouse gas emissions by 2040. We are ready to become a global leader in climate friendly farming, working with government to provide a global blueprint for sustainable food production, underpinning the principles of the G7 – which is due to meet in Cornwall in June – and its priorities on trade, climate change and health.

By working together to make the most of the opportunities that we have – by creating jobs, boosting green economic growth, increasing exports and improving the wellbeing of the population – we can build a better Britain and level up the entire country, so no one is disadvantaged by where they live or where their business is based.

Farming – and rural Britain – can provide solutions to many of the challenges we face, and I hope this report will inspire, invigorate and empower a new, ambitious and revolutionary approach to rural Britain and maximise the economic and social potential of the living, breathing economy that underpins 70% of our country.

Minette Batters
NFU President

Building a world class British food brand at home and abroad

We produce some of the highest quality, safest, most nutritious food in the world in this country. We can work together to reconnect people with their diets and ensure everyone has the opportunity to eat great British food, regardless of where they live or their income.

Support for, and promotion of, the Red Tractor Assurance scheme can play a central role in helping people buy British wherever they can and seeing more British food on more British plates – a widely recognised scheme that shoppers know stands for high quality, safe, traceable food produced with care and to high environmental and animal welfare standards.

Championing our great British food at home is a great start. The massive success of the procurement work done during the 2012 London Olympics to celebrate the fantastic diversity and quality of British food shows how it can work. Serving more local British food in our hospitals, our schools and in the armed forces would be a huge vote of support for British food. We want to engage with government departments and work with them to open up all routes to market for British food. Not only can this benefit the economy, but reconnecting people with where the raw ingredients of their food comes from could also have an impact on their health.

Making the most of overseas markets post-Brexit is also crucial. The food and drink sector is already working closely with the government to grow export markets. There is more than £60 million of farmer investment in the Agricultural and Horticultural Development Board through levies. Industry is ready to partner with government to build our global ambition and increase the British food brand identity across the world, and government should be investing time and effort overseas and showing global leadership to help us achieve this.

> *We want to engage with government departments and work with them to open up all routes to market for British food because this can help benefit the country*

RED TRACTOR CERTIFIED STANDARDS

Climate smart farming leading the world

The new Agriculture Act means we now have a clear opportunity for British farming to become a global leader in sustainable, climate-friendly food production.

The new Agriculture Act means we now have a clear opportunity for British farming to become a global leader in sustainable, climate-friendly food production.

Agriculture and horticulture are dynamic, forward-looking industries. Farmers and growers are ready to adopt new technology to become more productive while reducing environmental impact and contributing to the country's collective ambition to become net zero.

The ability to use all the tools available to us to increase our food production, while reducing our impact, will have economic as well as environmental benefits and reinforce our ambition as a global leader. This includes new breeding techniques, which have the potential to play an important role in the challenge of issues like improving disease resistance. Such innovations will not be the answer to all the challenges we face but could help improve productivity and drive green growth in the rural economy and beyond.

Working in partnership on integrated water management is also central to this – ensuring the agri-food sector is recognised as an essential user of water and has secure access to supplies in times of drought, making sure productive agricultural farmland is properly valued and protected from floods, and ensuring any natural flood management initiatives are appropriately incentivised and that farmers are involved at every stage of their development.

To ensure our farmers can utilise advances and become world leaders in climate friendly farming we want to support the government's progressive approach to the adoption of new technologies, and its pro-science agenda. Maintaining Britain's agricultural science base through research and development facilities and education will ensure Britain's food and farming sector continues to be world-leading.

Opening up rural Britain for business

While farming is at the core of the countryside, rural Britain provides so much more for the country through tourism and diversified farm businesses.

Around 65% of all farm businesses in England also run other enterprises – such as farm shops, wedding venues and B&Bs – which generated £740 million for the UK economy in 2018/19, while in 2019, 18.5% of all money spent on holiday trips in England was spent in the countryside – just over £2 billion[1].

Funding from the EU played an important role in helping farmers develop enterprises which contribute to local value-added food production, tourism, rural infrastructure development and diversification activities which, in turn, drive regional green economic growth. The announcement that funding from the UK Shared Prosperity Fund will at least match that funding is welcome, as is the commitment that a portion of the fund will go the areas that will benefit most, including rural communities.

The role of domestic food production and the development of local agri-food businesses has to be a key component for any approach to a green recovery and any future structural funding should be designed together with rural businesses to ensure they too can mobilise that replacement funding.

To enable farm businesses to achieve their potential it is vital that they can maximise the value of raw ingredients they produce. The dairy sector is a prime example of this, with cheese, cream and yogurt all value-added products, with fantastic export opportunities as well as delivering more for the home market. The growth in microbreweries is another example, providing opportunities for barley and hops growers.

Creating business conditions that make financial commitments in processing plants in rural areas attractive would help to drive further green economic growth and support the potential of the food and farming sectors to contribute more as well as provide more employment opportunities for people living in rural Britain.

1. SOURCE: *The GB Tourist 2019 Annual Report, VisitEngland/Kantar*

AROUND
65%
OF ALL FARM BUSINESSES IN ENGLAND ALSO RUN OTHER ENTERPRISES WHICH GENERATED
£740 MILLION
FOR THE UK ECONOMY IN 2018/19

SOURCE: Farm Accounts In England: Results from the Farm Business Survey 2018/19, Defra/National Statistics, December 2019

Green growth for all via country-wide connectivity

The coronavirus pandemic has fundamentally changed the way many people work. The ability to be able to do business wherever you are no matter what business you are in has only served to highlight the importance of quality broadband and mobile phone coverage across the whole country.

Poor connectivity has put rural areas at a disadvantage. Reliable coverage and connections will benefit farming, British food production, and wider rural businesses. Better broadband will increase the potential of people being able to run other successful businesses in rural areas, which will attract more people to live and work there and boost rural economies.

A high standard of rural connectivity is essential to take full advantage of new technologies. Lack of digital connectivity acts as a constraint to capital investment. If British farming is to become more competitive in an increasingly uncertain and turbulent time, then access to this essential infrastructure is of paramount importance.

Almost every respondent to the 2020 NFU Digital Technology Survey said access to reliable broadband and a mobile signal was essential for their business, yet less than half felt their mobile signal was sufficient for their business needs, while only 40% of farmers felt their broadband speeds were sufficient.

To help rural communities get access to broadband, we want the Shared Rural Network to remain a priority and to be completed by 2025. This would mean all communities can have access to good mobile signal, which can also be used for mobile broadband while communities wait for fibre broadband.

> *The ability to be able to do business wherever you are no matter what business you are in has only served to highlight the importance of quality broadband and mobile phone coverage across the whole country.*

ONLY 40%
OF FARMERS
FELT THEIR BROADBAND SPEEDS WERE SUFFICIENT.

SOURCE: NFU 2020 Digital Technology Survey, February 2021

A safer, cleaner, greener rural Britain

Farms, and wider rural communities, have increasingly become the targets of criminals in recent years and this has left rural residents feeling more vulnerable. Crimes like hare coursing, fly-tipping on farmland, dog attacks on livestock and theft of large and small machinery have much wider knock-on effects on the farm business.

NFU Mutual's theft claim figures for 2019 revealed that rural crime cost the UK £54.3 million – the highest cost recorded in eight years. Meanwhile, local authorities dealt with over one million fly-tipping incidents in 2018/19.

The National Rural Crime Network's Fair Funding for Rural Policing report, published in June 2016, said fixed costs were higher among rural police forces which cannot benefit from economies of scale because they serve more dispersed, low density populations. It stated this equated to £32.1 million across the ten smallest forces (by population) – the equivalent of over 600 officers. Meanwhile, the Rural Services Network estimated that in 2018/19 rural areas received £167.01 per head of population in police funding compared to £206.20 in urban areas – equivalent to a 23.5% difference.

Rural crime must be treated as a priority issue for rural communities. A cross-departmental rural crime task force would support a co-ordinated governmental approach to ensure coordination between government departments, government agencies, Police & Crime Commissioners, Chief Constables and local authorities to address the failures in dealing with rural crime.

So far, 170 councils have banned the release of sky lanterns on their land and there should be an ambition to make this a nationwide ban. These objects pose a large fire risk and can cause suffering for, or even kill, farm animals and wildlife.

NFU MUTUAL'S THEFT CLAIM FIGURES FOR 2019 REVEALED THAT

RURAL CRIME COST THE UK £54.3 MILLION

SOURCE: NFU Mutual Rural Crime Report 2020, August 2020

SO FAR,

170 COUNCILS

HAVE BANNED THE RELEASE OF SKY LANTERNS ON THEIR LAND.

SOURCE: Join our campaign to ban sky lanterns, NFU Countryside website, December 2020

> *Crimes like hare coursing, fly-tipping on farmland, dog attacks on livestock and theft of large and small machinery have much wider knock-on effects on the farm business.*

Enjoying and celebrating the wellbeing benefits of rural Britain

People have always enjoyed visiting rural Britain. For the last 12 months, visiting the countryside has been the only recreation and exercise many people have been able to do.

Connecting people with rural areas on their doorstep that they may never have visited before can have a long-term legacy of greater appreciation, valuing and use of the countryside, as well as boosting health and wellbeing.

Many popular rural tourist spots are working farmland, an iconic patchwork of food and farming landscapes with many farmers working hard to maintain footpaths and public rights of way so visitors can enjoy our beautiful, iconic countryside.

As part of a two-way levelling up agenda, we recognise and continue to actively promote the enormous benefits to people's wellbeing of getting out and enjoying the countryside and farmed landscapes. We know access to rural areas for exercise and enjoyment, and the opportunities provided by rural tourism, are something the whole country can benefit from and we continue to work closely with Defra and Natural England (NE) to ensure the safety of everyone using public access rights in the countryside.

Farmers want people to engage with where their food comes from. It remains of huge importance that this access and engagement is achieved in a responsible way and the fact that much of this land is a working environment is recognised, and respected, by the public and decision-makers alike.

One of the key lessons learned from the COVID-19 outbreak has been the importance of people adhering to the Countryside Code when they visit the countryside for exercise or recreation and for the Code itself to be updated so it remains relevant to a 21st century audience.

Because of the contribution green access makes to the physical and mental wellbeing of the nation, farmers' efforts to maintain, create or enhance public rights of way as part of a modern network should be rewarded as part of new government farm funding schemes, provided they recognise the value, and preserve the integrity, of land used for food production.

Connecting people with rural areas on their doorstep that they may never have visited before can have a long-term legacy of greater appreciation, valuing and use of the countryside, as well as boosting health and wellbeing.

Making a positive difference through planning reform

Farming provides local food and supports local food chains, provides jobs and supports people to live and work locally, and to use local services. Thriving farm businesses are at the heart of many rural communities.

But too often the planning system can act to make the rural economy less sustainable – preventing farm modernisation, diversification and home building for farm workers. In some cases, blanket environmental requirements mean that development is refused: a perverse outcome when development would make a farm business more sustainable, reduce its environmental footprint, create jobs, and promote green growth across the sector.

A sympathetic and symbiotic relationship is crucial. If farm businesses are allowed to build the right buildings, and do it in a way that is sympathetic to the local environment, it can reduce the impacts of production and help in our collective goal to achieve net zero. Newer glasshouses could help to produce more of our own fruit and veg, at a time when the nation's health and wellbeing has never been more important.

The government's planning White Paper provides the perfect opportunity to introduce reform that makes a difference, cuts costs and complexity, and allows much needed farm development to be delivered on the ground. It also gives government the chance to demonstrate how it can ensure renewal and growth can be sustained in rural areas in the long term.

A new direction of travel for our planning system is very welcome. We want to work with government to help develop a new framework that promotes more economic and social activity. Encouraging people to live and work locally, and building more affordable rural housing, will ensure people can integrate into rural communities signalling a Britain growing more diverse local economies, and in turn helping to boost the local and national economy.

> *The government's planning White Paper provides the perfect opportunity to introduce reform that makes a difference, cuts costs and complexity, and allows much needed farm development to be delivered on the ground.*

Inspiring STEM learning through agriculture

Agriculture has a unique ability to engage children in STEM (Science, Technology, Engineering and Maths) learning outside the classroom and inspire children who prefer a more hands-on approach to learning.

NFU Education was established in 2017 as part of the NFU's drive to reconnect children with rural life, develop their understanding of farming, and increase their awareness of their food from field-to-fork. Its bespoke education initiatives and free teaching resources use farming as a topic to teach these core subjects in an innovative way.

The NFU's two competitions focused around STEM learning – Farmvention and Farming STEMterprise – have proved hugely popular with pupils and teachers alike. This has demonstrated that food and farming can help to bring the core STEM subjects to life for many children. Resources have been adapted to a virtual model to help parents and teachers with learning during lockdown, with more than 75,000 pupils taking part in NFU Education's Science Week lessons.

This is just the beginning. It is crucial to engage children in these subjects, which will become even more important in the future. As well as inspiring a generation of children to learn vital STEM subjects and reconnecting young people with where their food comes from, it could also create the next generation of Britain's farmers and growers.

Government has the opportunity to recognise and promote the role that farming can play in teaching vital STEM subjects for the benefit of the next generation and also in inspiring interest in working in Britain's all-important food industry and future generations of scientists, engineers and mathematicians.

> *Government has the opportunity to recognise and promote the role that farming can play in teaching vital STEM subjects*

Empowering a British workforce

Farming as an industry is continually changing. It is a dynamic sector where new technologies are being adopted all the time. These new technologies offer a range of exciting career opportunities for young people from both rural and urban areas.

The seismic changes of the past 12 months ably demonstrate the farming sector's ability to flex and adapt. Working hand in hand with government we have created and promoted jobs and opportunities for people in agriculture. Pick for Britain, which saw a fantastic response from the public giving people the chance to work on farms, and the government's KickStart scheme, which is designed to get young people into long-term employment by funding six-month work placements with the aim of creating fully funded new jobs, are just two examples. More collaboration like this has the potential to open up careers and job opportunities in the food and farming sector to a home audience like never before.

> *More collaboration like this has the potential to open up careers and job opportunities in the food and farming sector to a home audience like never before.*

Agricultural colleges also play a crucial role in developing the farmers of tomorrow. Focused funding and facilities will enable farming and food production to develop and grow.

As new technologies become available, it is also crucial that there is a professional skills pathway available that recognises, and addresses, the skills and training and development needs of the sector and its workforce. The NFU is part of the project group that is developing the Institute for Agriculture and Horticulture, a body being set up to attract and retain talent from a wide range of backgrounds. It will act as an umbrella, co-ordinating existing skills and training provision across England.

It is also vital that rural businesses are able to attract and retain the workforce they need. Levelling up rural services, like public transport, access to services, including high speed internet and medical provision, will give greater scope for people to live and work in both urban and rural areas, relieving pressure on our cities and offering a greater sense of well-being.

Rural proofing global Britain

Policy areas should be viewed through many lenses, but the rural lens is an important one. Rural areas – and the communities and businesses within them – have much to contribute to the economic and physical wellbeing of the country.

Empowering rural areas to be part of discussions and decision making, developing policy and major national capital spend projects, will lead to a true levelling up of rural and urban Britain.

This rural voice must be expressed by people who are living and working in the countryside and know what the real impact will be on homes, livelihoods and services. They must also be engaged at an early stage in the process so they feel valued and that their voices can have genuine influence on decisions. While projects may well provide an overall benefit for the national economy, it is important that any impact on rural areas is not marginalised or ignored to ensure real value can be added by the people and businesses in these areas.

As decision-making becomes more localised it is important that rural communities are close to, and involved in, those decision-making processes. Small and medium sized businesses are the backbone of our food industry and innovation is their lifeblood. Empowering rural areas will also have economic benefits by enabling them to take advantage of opportunities to develop.

Rural proofing all primary legislation will help to ensure it has a positive effect on rural life, the rural economy, and help contribute to our shared goals of national prosperity and a greener economy.

> *Rural areas – and the communities and businesses within them – have much to contribute to the economic and physical wellbeing of the country.*

Rural Britain – and the farm businesses that lie at its heart – has a crucial role to play in developing, implementing and making a success of the new green agenda. There are huge opportunities in rural areas to create jobs; to generate green economic growth; to showcase "Brand Britain" on the world stage through increased exports; and to improve the health and wellbeing of the entire nation.

LEVELLING UP RURAL BRITAIN

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NFU

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Agenda Item 4

Committee:	Local Plan Leadership Group	**Date:**
Title:	Retail Capacity Study	Wednesday, 9 February 2022
Report Author:	Stephen Miles, Local Plans and New Communities Manager smiles@uttlesford.gov.uk	

Summary

1. This report sets out the retail evidence base to inform the emerging Uttlesford Local Plan.

Recommendations

2. To note the findings of the work and to utilise it in the development of the emerging Local Plan.

Financial Implications

3. This work is within the 2021/22 budget.

Background Papers

4. N/a

Impact

5.

Communication/Consultation	The timetable builds in three stages for people to make representations on the draft Local Plan.
Community Safety	N/a
Equalities	Forthcoming policies will be subject to an Equalities and Healthy Impact Assessment (EqHIA).
Health and Safety	N/a
Human Rights/Legal Implications	Preparation of a local plan is a statutory duty. It needs to meet legal tests and comply with regulations.
Sustainability	Forthcoming policies will need to meet the sustainability objectives of the Council and

	the Local Plan will be subject to a Sustainability Appraisal.
Ward-specific impacts	All
Workforce/Workplace	N/a

Situation

6. The emerging Local Plan will allocate land to meet the development needs of the district. The study examines the latest retail trends, and draws on empirical research in order to advise the Council on an appropriate policy basis for the plan period to 2040.

7. The Study incorporates a series of health-checks across the District's four main centres of Saffron Walden, Great Dunmow, Stansted Mountfitchet and Thaxted. It also incorporates the findings of a household telephone survey of 1,002 households. The survey findings enable a detailed assessment of current shopping patterns, as well as a qualitative assessment of the strengths and weaknesses of each centre

8. The Study concludes that, broadly speaking, the centres of the District are in reasonably good health. It also shows that the District has retained a broadly similar percentage of its own residents spending since the last surveys were carried out in 2016. This means that there is little evidence of any increase in 'leakage' to destinations elsewhere. What is evident though, is that there has been some switching away from town centre destinations in the District, to out-of-centre destinations in the District, particularly in Saffron Walden.

9. The Study concludes that there is quantitative capacity for new convenience goods floorspace in the District. This is largely as a result of the over-trade of existing foodstores. The Study concludes that the Council may wish to consider a further foodstore in Great Dunmow to meet this identified capacity. Importantly though, any proposals should follow the sequential test and notwithstanding the capacity identified, applicants would need to provide justification for the impact of the proposals on existing centres in line with both local and national guidance.

10. The Study finds very limited capacity for comparison goods floorspace, and only then, towards the end of the Plan period.

11. A series of recommendations are provided for meeting growth, preparing development management policy, and monitoring retail health.

Risk Analysis

12.

Risk	Likelihood	Impact	Mitigating actions

If the Council does not have an NPPF compliant evidence base the plan could be found unsound	2	4 – delays in adopting the Local Plan	Professional evidence developed in line with the NPPF and PPG

1 = Little or no risk or impact
2 = Some risk or impact – action may be necessary.
3 = Significant risk or impact – action required
4 = Near certainty of risk occurring, catastrophic effect or failure of project.

Uttlesford Retail Capacity Study

Final Report

On behalf of Uttlesford District Council

November 2021

Contents

Appendices:

1 Executive Summary

1.1 This Study has been produced by Nexus Planning in support of Uttlesford District Council's emerging Local Plan. It examines the latest retail trends, and draws on empirical research in order to advise the Council on an appropriate policy basis for the plan period to 2040.

1.2 The Study incorporates a series of health-checks across the District's four main centres of Saffron Walden, Great Dunmow, Stansted Mountfitchet and Thaxted. It also incorporates the findings of a household telephone survey of 1,002 households. The survey findings enable a detailed assessment of current shopping patterns, as well as a qualitative assessment of the strengths and weaknesses of each centre.

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1.5 The Study finds very limited capacity for comparison goods floorspace, and only then, towards the end of the Plan period.

1.6 Drawing on the findings of the Study, a series of recommendations are provided for meeting growth, preparing development management policy, and monitoring retail health.

2 Introduction

Instruction

2.1 Nexus Planning (Nexus), alongside NEMS Market Research (NEMS), were commissioned by Uttlesford District Council in July 2021 to produce a Retail Capacity Study for the District. The Council are currently preparing the Local Plan for the plan period up to 2040. As such, this 2021 Study will form part of the evidence base upon which the emerging Local Plan will be based.

2.2 The approach adopted by Nexus and the project team has been refined to reflect the latest Government guidance provided in the National Planning Policy Framework (NPPF) (July 2021), Planning Practice Guidance (PPG), and the Use Classes Order (2020 amendments).

2.3 Accordingly, a fundamental objective of the Study is to produce a NPPF and NPPG compliant Study, which provides the Council with an up-to-date objective assessment of retail needs and provision, the health of Saffron Walden, Great Dunmow, Stansted Mountfitchet and Thaxted, and a consideration of possible strategic policy responses to any prevalent or emerging issues in those centres.

Scope of Works

2.4 The tender specification identifies the following key elements to be completed as part of the Study:

- Updated assessment of the latest retail trends and the impacts of these;
- A review of the latest government policy on retail and other town centre uses, as well as previous relevant studies;
- Retail capacity assessment, including:
  - Undertaking primary research in the form of a consumer survey (household telephone survey);
  - Consideration of shopping patterns and market share analysis, (including how these may have changed since the 2018 Retail Study);
  - Assessment of the retail performance of the District's centres in the context of the wider sub-region and the influence of competing centres; and

  - A consideration of food and beverage spending.

- Health check assessments, in line with the requirements of the PPG, including an assessment of the following:

  - Ground floor town centre composition surveys;

  - Strengths, weaknesses, opportunities and threats for retaining and encouraging footfall and commercial sustainability;

  - The town centre offer, including the range of multiple retailers, independent retailers, services, facilities and attractions compared to its competitors;

  - The physical appearance, public realm, image and environment;

  - The ease of access (including car parking) and legibility by different transport modes and by people of different ages and abilities;

  - The levels of customer service and the overall customer experience/expectations; and

  - The barriers that would need to be addressed in order to facilitate improved economic conditions.

- Policy recommendations, including the following:

  - Provision of advice on options to meet floorspace requirements and accommodating growth;

  - Provision of advice on existing retail policies; and

  - Provision of advice on future retail monitoring.

2.5 The project team has worked with officers of the Council and reported the initial findings during the Study process, and in this report we set out the assessment and key findings as a consolidated report.

2.6 Neighbouring authorities have been consulted under the Duty to Co-operate in the early stages of this Study.

2.7 In working through the scope of works, the project team have been mindful of the impact of the Covid-19. While the Study was undertaken and drafted subsequent to any major lockdown or restrictions, the reality is that the impacts of the pandemic are still materialising. References to temporary closures of various retail facilities may have changed following publication, particularly as Government legislation responds to the constantly evolving picture presented by the pandemic.

Remainder of Report

2.8 In addressing the above scope of works, this report is comprised of the following chapters:

- **Chapter 3** provides an assessment of the latest retail and other town centre uses trends and the impacts of these;
- **Chapter 4** sets the policy context for the study, including providing a review of the latest government policy on retail and other town centre uses and town centres;
- **Chapter 5** provides a summary of the retail capacity projections for the District;
- **Chapter 6** sets out a health check assessment of each of the main centres within the District; and
- **Chapter 7** sets out our policy recommendations.

3 Retail Trends

Introduction

3.1 In order to provide a context for this Study and help identify the sectors that are more likely to be the subject of additional development proposals, we provide an overview of current retail trends below. In reading the review, it should be noted that the retail sector is dynamic and, whilst online shopping has impacted on the retail sector, new retailers and new formats continue to evolve to meet shoppers' needs.

3.2 The commentary should therefore be taken as a 'snapshot' in respect of current market conditions; it will be necessary to judge future development proposals for main town centre uses with reference to the prevailing conditions at the time of a proposal's determination. This is particularly the case given the current commercial circumstances arising from the Covid-19 pandemic, and the impact of the lockdown measures on our high streets and operators (both local and nationally). We reflect on this in more detail below.

The Current State of the UK Economy

3.3 The UK economy has experienced a significant shock over the past 18 months as a result of the Covid-19 pandemic and subsequent restrictions on movement and behaviour which have sought to mitigate its impact. This uncertain background has caused business investment and expenditure to decline. Household spending fell by over 20% quarter-on-quarter in the second quarter of 2020 following the imposition of national lockdown measures. This is the largest quarterly contraction on record. Retail sales volumes also suffered double-digit falls in April 2020 as all but essential stores closed during the height of the lockdown.

3.4 However, as a result of the gradual reopening of businesses over summer 2020, the economy returned to growth, with this gathering momentum as a greater number of sectors reopened, including hospitality and leisure services followed by the full reopening of schools. A more pronounced resurgence in the number of case of Covid-19 resulted in the Government reinstating a nationwide lockdown in early 2021.

3.5 In October 2020, Experian published its Retail Planner Briefing Note 18 ('ERPBN18'), which provides comprehensive and up-to-date information on retail developments and short, medium and long term forecasts for retail planning decisions.

3.6 ERPBN18 sets out Experian's best estimate of the retail sector and future changes in expenditure at the time of its publication. Experian anticipates that the post-Covid-19 recovery will be subdued over the coming months and that the economy will not recover to pre-Covid levels until at least 2022. In this regard, Experian consider that due to the unprecedented nature of the global pandemic, there is great uncertainty over the scale and duration of the outbreak and the resulting economic consequences. An orderly transition and adjustment to a new trading relationship resulting from Brexit is also assumed, and any uncertainty arising from this is likely to further weigh on the economy.

3.7 Although the medium term outlook for GDP will be shaped by the course of the pandemic, the long term outlook for GDP remains unchanged, with growth expected to remain below historic averages due to slower population rises and productivity.

3.8 The overall retail sales are projected to be volatile in the near term, but growth is less impacted over the medium and longer terms. The outlook for special forms of trading (i.e. internet sales, mail order) has been revised upwards. The prospects for retail floorspace has been revised down in line with weaker projections for spending and stronger projections for internet sales.

3.9 In terms of inflation, Office for National Statistics data[1] indicates that the rate of inflation (as measured by the consumer price index) increased from 0.5% at June 2016 to a high of 3.1% at November 2017, before reducing to 0.6% at December 2020. The rate of inflation in 2021 has then increased back up to 2.4% in June 2021. Retail has been an industry under significant stress, as many retailers find themselves squeezed between rising costs and the increasing volume of sales over the internet. This has of course, been pressurised further with the impact of the Covid-19 pandemic.

3.10 There will still be the need and demand for physical stores, despite the increase in shopping online. This is particularly the case for convenience sales in light of the fact that the online shopping orders are still, in the majority, being picked from shelves in physical stores. In terms of comparison shopping, there will also still be the requirement for physical stores as shoppers enjoy the experience of viewing items in person, but this shopping experience will need to evolve and diversify, and seek to engage shoppers at a level which has not been explored before.

[1] ONS 'Consumer price inflation tables' dataset, May 2021

3.11 In terms of the grocery market, the ONS[2] reports that the food and non-alcoholic beverage inflation rate as of May 2021 was -1.3% when compared to 12 months previous, with the inflation rate on alcoholic beverages and tobacco was 1.7% when compared to 12 months previous.

3.12 The long-term impacts of this period are yet to be determined, and as such it is almost impossible to predict with any meaningful certainty what effects short-term business closures and significantly reduced levels of activity will have.

3.13 However, as may be expected, ONS[3] has reported that retailers which predominantly rely on customers visiting their stores recorded a big drop after they were ordered to close their doors. Dispensing chemists sold consistently more since the pandemic began than they did before, with their sales increasing strongly in March 2020, and continued to grow in June even after restrictions were eased and other non-essential stores were allowed to reopen. Non-specialised foodstores, which include supermarkets, also traded consistently above their pre-pandemic levels. However, for furniture retailers, customers returned in the summer with trade returning to pre-pandemic levels and growing further, boosted by people still spending more time at home than they used to.

3.14 In terms of online retailing, ONS has reported "*…online sales reaching higher than usual levels over the course of the pandemic*". Although these levels dropped off after shops reopened in June, the proportion of online retailing began to increase in October and continued to do so into November following the reintroduction of lockdown measures. However, with the gradual reopening of the economy in Spring/Summer 2021, ONS has reported a decrease in the overall proportion of retail spending online.

Available Expenditure and the Impact of the Internet

3.15 Experian forecasts fairly turbulent growth in per capita convenience and comparison goods expenditure over the short term. In this regard, Experian forecasts that per capita expenditure growth in the convenience goods sector will increase substantially to 8.4% at 2020 (from -0.9% at 2019), with this growth largely attributed to consumers spending more on such goods as a result of lockdown measures. However, Experian forecasts a 6.2% decrease in per capita expenditure growth in 2021, with very limited forecast growth thereafter.

[2] ONS 'Detailed Figures by Division' dataset, May 2021
[3] ONS analysis titled 'The impact of the coronavirus so far: the industries that struggled or recovered', published on www.ons.gov.uk on 9 December 2020

3.16 As Figure 1 indicates, forecast increases in comparison goods spending are more optimistic following a substantial decrease of 8.5% in 2020, but it is evident that per capita comparison goods expenditure increases going forward will be below the level apparent at the turn of the millennium. Experian identifies that per capita comparison goods expenditure growth dropped from 5.4% at 2017 to 3.4% at 2018, and forecasts that it will remain between 2.9% to 3.0% per annum in the medium to long term. The exception to this is the decrease noted above in 2020, which is largely a result of lockdown measures closing all but essential stores, and an anticipated growth of 6.5% in per capita expenditure in 2021 under the expectation that lockdown measures will be gradually eased and expenditure will pick up (as has occurred).

Figure 1. Experian's Identified and Forecast Convenience and Comparison Goods Per Capita Expenditure Growth

Volume Growth Per Head (%)	2016	2017	2018	2019	2020	2021	2022	2023-27	2028-40
Convenience goods	3.3	1.9	1.0	-0.9	8.4	-6.2	0.2	0.0	0.1
Comparison goods	4.8	5.4	3.4	4.3	-8.5	6.5	3.8	3.0	2.9

Source: Figure 1a and Figure 1b of Experian Retail Planner Briefing Note 18

3.17 Whilst the above figures relate to a level of growth which is significantly below that which has historically been available to retailers, the situation for high street stores is exacerbated through the increasing amount of expenditure which is committed through special forms of trading[4] and, in particular, online.

3.18 In this regard, Appendix 3 of ERPBN18 indicates that special forms of trading accounted for just under 27% of total retail sales at 2020 as a consequence of Covid-19 and subsequent to very strong growth in online retailing over the past decade. Although the growth in special forms of trading is anticipated to drop back slightly in 2021, Experian believes that special forms of trading will account for almost 30% of retail sales by 2026, increasing to around 32% by 2031.

3.19 The below Figure 2 sets out Experian's identified and forecast level of special forms of trading as a proportion of overall convenience and comparison goods expenditure. Experian estimates that special forms of trading will account for over a third of comparison goods expenditure and over a fifth of convenience goods expenditure at 2031.

[4] Including internet sales, mail order, stalls and markets, door-to-door and telephone sales

Figure 2. Experian's Identified and Forecast Market Share of Non-Retail Sales for Convenience and Comparison Goods Sectors

Volume Growth Per Head (%)	2016	2017	2018	2019	2020	2021	2026	2031
Convenience goods	10.0	11.6	12.8	14.1	21.1	18.1	21.2	22.8
Comparison goods	18.5	20.8	22.4	23.4	30.6	29.1	33.7	36.2

Source: Figure 5 of Experian Retail Planner Briefing Note 18

3.20 The ongoing popularity of internet shopping continues to have clear implications in respect of the viability of some 'bricks and mortar' retailers. However, it is important to note that changes in how people shop also bring about some opportunities for retailers trading from the high street. In particular, many stores sell online but fulfil orders from regular stores rather than warehouses[5], with purchases therefore helping to sustain tangible retail floorspace. As a consequence, Experian also provides an 'adjusted' estimate of special forms of trading, which relates to expenditure which is not available to actual stores.

Convenience Goods

3.21 Recent socio-economic conditions have led to significant shifts in convenience goods retailing, which have resulted in the 'big four' supermarket operators' market share being cut. Mintel[6] finds that the decline of the food superstore is well established and that this can be attributed to two issues.

3.22 Firstly, people are undertaking food shopping in different ways. More people are living in town and city centres and more people are having difficulties financing the purchase of their own home. Mintel indicates that such people are more likely to undertake food shopping on an 'as needs' basis and are more likely to eat out or use takeaways. As such, they are less likely to have need to undertake a 'main food shop'.

3.23 Secondly, the current uncertainty in the economy has made hard discounters (namely Aldi and Lidl) a more attractive proposition, and are particularly thriving given that shoppers are currently having to be 'money savvy'. Discounters have also made efforts to try to compete more directly with the 'big four' supermarket operators, with larger stores, greater ranges of goods, fresh foods and premium products becoming increasingly prevalent. It is clear that the likes of Aldi and Lidl are no longer

[5] This is particularly the case with food shopping and speciality comparison goods purchases, where retailers often try to tap into a wider market through an online presence
[6] 'UK Retail Rankings', Mintel, April 2018

'discount retailers' as they once were, and have better met a wider range of customers' needs through the increase in a supply of more premium products.

3.24 The move towards the middle ground has allowed discounters to secure market share from both superstores and smaller convenience stores. In addition, we note that discount retailers are often happy to trade alongside more upmarket convenience goods retailers (such as Marks & Spencer Foodhall) as, collectively, the two stores can meet many food shopping needs.

3.25 The shifts in the sector are illustrated with reference to changes in retailers' market share in recent years, as shown in Figure 3.

Figure 3. Market Share of convenience goods operators

Operator	December 2016	December 2017	December 2018	December 2019	December 2020
Tesco	28.4	28.1	27.8	27.4	27.3
Sainsbury's	16.5	16.5	16.1	16.0	15.9
Asda	15.3	15.3	15.2	14.8	14.3
Morrisons	10.8	10.8	10.6	10.3	10.4
Aldi	6.2	6.8	7.4	7.8	7.4
Co-op	6.3	5.8	5.9	6.1	6.0
Lidl	4.6	5.0	5.3	5.9	6.1
Waitrose	5.1	5.2	5.0	5.0	5.0
Iceland	2.2	2.2	2.2	2.3	2.5
Symbols & Independent	1.8	1.7	1.5	1.6	1.7
Other Outlets	1.7	1.6	1.7	1.6	1.8
Ocado	1.1	1.1	1.2	1.3	1.6

Source: KANTAR Grocery Market Share. Figures shown are for the final reporting period in each calendar year

3.26 Over the past couple of years, the market has witnessed the closure of unprofitable foodstores, particularly operated by Tesco and Morrisons but a substantial investment plan from the likes of Aldi and Lidl over the coming years, which will likely further shift the grocery market in the short and medium term.

Comparison Goods

3.27 The comparison goods sector is currently being squeezed by a number of factors, the most substantial being the effects of Covid-19 and the efforts to contain it. Other factors include reduced expenditure growth, the ability of internet shopping to plug gaps in retailer representation, increases in the minimum wage, and business rates changes.

3.28 This 'perfect storm' has resulted in changes in the structure of retailing on the UK high street and a generally lesser reliance on comparison goods retail. To underscore this, the Centre for Retail

Research reported that 2020 was the worst year for the retail job losses in more than 25 years. Around 180,000 retail jobs were lost in total, with this figure representing a rise of almost a quarter on 2019[7].

3.29 Whilst the sector is continually evolving and there are a number of ongoing success stories (including Primark, Zara, Jack Wills, Joules and Hotel Chocolat), recent headlines have focussed on failing retailers and store closures. High profile retailers that have struggled include Debenhams, which announced the closure of all 124 stores in December 2020[8] and the Arcadia Group, which owned Topshop, Topman and Dorothy Perkins, which in February 2021 announced the closure of around 500 stores[9]. Furthermore, Intu Properties, one of Britain's biggest shopping centre owners, fell into administration in June 2020 after failing to secure an agreement with its creditors[10].

3.30 Whilst the loss of the some of the above names will have significant repercussions for certain towns (particularly those that lose Debenhams, Marks & Spencer or House of Fraser from their high street in very quick succession), some well-known retailers have failed to 'move with the times' and update their offer, accommodation and online presence. This is partly a consequence of retailers struggling to reinvest in their business when margins are tight (or non-existent).

3.31 It will be interesting to see whether any permanent change in working from home may act to counterbalance the polarisation trend, given the prospect of fewer commuters in larger centres and greater numbers of people spending the working day in and around their home. The impact on larger centres may be to reduce footfall, particularly within the weak, and result in the shift in expenditure being directed to the smaller town, district and local centres. Whilst this will be a positive for the smaller centres, the city centre may suffer as a result.

3.32 Whilst structural changes have had a material impact on the vitality and viability of many UK high streets, there are some beneficiaries. In particular, household discount operators, such as B&M Bargains, Poundland and Wilko, have reoccupied a number of medium to large retail units. However, as evidenced by the failure of Poundworld, there are some indications that this market may be approaching capacity.

3.33 It remains to be seen what additional long-term impacts will eventuate from retail closures resulting from Covid-19 containment measures. However, prior to the implementation of lockdown measures,

[7] Article headlined 'Retail sales in 2020 'worst for 25 years', BBC, 12 January 2021
[8] Article headlined 'Debenhams set to close putting 12,000 jobs at risk', BBC, 1 December 2020
[9] Article headlined 'After Topshop owner Arcadia's demise, what now for UK clothes shopping?' The Guardian, 13 February 2021
[10] Article headlined 'Shopping centre owner Intu collapses into administration', The Guardian, 26 June 2020

trading conditions for retailers were challenging and many retailers were struggling to meet costs, including rents, resulting in a higher proportion of retailers restructuring or entering administration. As has been seen throughout 2020 and 2021, the conditions have only become more challenging.

Leisure and Food & Drink

3.34 The greater availability of high street units appears to have helped stoke an entrepreneurial spirit in recent years, with a number of centres beginning to benefit from a greater focus on independent retailers and also modern markets, which are frequently focussed around food and drink operators.

3.35 More generally, the food and drink sector has also been buoyed in recent years by the success of mid-market national multiples, which expanded quickly across the UK. However, there are signs that the market is becoming saturated in some locations and a number of high profile operators have been in financial difficulty. Given the problems suffered by such operators, the market has become more cautious and mid-market operators are picking new sites carefully as a result. Instead, we have seen a number of independent operators flourish, both before and throughout the pandemic, and a desire of shoppers to choose local operators over the bigger, regional and national brands. This is particularly the case for the smaller centres in the authority area.

3.36 A further significant recent high street success story has been the resurgence of the town centre leisure sector, which has resulted in new cinemas being developed close to the shopping core and 'competitive socialising' concepts, which include bowling, crazy golf, table tennis, darts, axe-throwing and other seemingly niche pursuits.

3.37 Cinema openings have been on the up in recent years and 'boutique' cinema operators – including Curzon, Everyman and The Light – are able to operate from smaller sites in town centres (partly as a consequence of digital technology). Town centre cinema development has successfully underpinned wider mixed-use developments, as food and drink operators are typically keen to locate in close proximity to benefit from spin-off custom. New, innovative leisure operators have been particularly beneficial both in re-using existing difficult to let premises, and in driving the evening economy.

3.38 More generally, the gym market continues to perform well, with the Leisure Database Company identifying that there are now more than 7,000 gyms across the UK, with the fitness market having an estimated value of more than £5bn. The Leisure Database Company suggests that this is a 'golden age of fitness', with around one in every seven Britons having a gym membership. Budget gyms are currently particularly popular, with operators such as Pure Gym, the Gym Group and easyGym utilising a format that is based on low costs and high volume.

3.39 There is a concern that the implications of the pandemic will be particularly felt on the leisure sector, with some facilities not being allowed to reopen until July 2021. The full impact on the leisure sector as a whole will really evolve throughout the remainder of 2021 and into 2022, and it is clear that the industry is not 'in the clear' yet.

The Uttlesford Context

3.40 Reports in May 2021 suggested that Uttlesford's shops and centres had experienced a 29% reduction in footfall when contrast to like-for-like assessment pre-pandemic[11]. There have been some high profile closures, including the likes of Laura Ashley, Carphone Warehouse and Prezzo in Saffron Walden and TSB Bank in Great Dunmow.

3.41 However, the retail sector, and those who oversee it, have been resilient. There has been great success in launching a 'Click it Local' scheme, which provides a platform for local independent businesses to trade online and have their goods delivered to people's homes. As we will go on to examine in Section 5, this is likely to have contributed to lower vacancy levels than those experienced in many other parts of the country. The largely independent nature of trading (especially outside of Saffron Walden) is likely to have contributed to resilience over the pandemic.

3.42 The District is also largely free of local out-of-centre competition (again, outside of Saffron Walden), which assists its town centres in meeting the day-to-day demands of its residents. However, as we will go on to examine under our market share assessment in Section 4, this does not preclude significant numbers of residents from travelling further afield, especially for their comparison goods shopping.

[11] Google Mobility Report, May 2021

4 National and Local Policy Context

Introduction

4.1 Prior to discussing the floorspace capacity and vitality and viability of the centres within Uttlesford District, it is important to set out the prevailing national planning policy context for retail in the UK, as well as setting the scene for the Uttlesford District Development Plan.

4.2 The following chapter of this Study sets out the recent updates to the planning policy context, including updates to the National Planning Policy Framework (2021), hereafter, referred to as the NPPF; the National Planning Practice Guidance (NPPG), as well as the recent changes to the Town and Country Planning (Use Classes) Order and Town and Country Planning (General Permitted Development Order).

National Planning Policy Framework

4.3 The NPPF was initially adopted on 27 March 2012, and the Government published the updated version on 24 July 2018, which was further revised in July 2021.

4.4 The NPPF remains pro-growth with a 'presumption in favour of sustainable development'. It effectively instructs decision makers to support development unless there are clear negative environmental, social and/or economic impacts. The NPPF provides the national guidance against which all planning applications should be considered.

4.5 At paragraph 8, the NPPF asserts that the planning system must help build a strong, responsive and competitive economy. This overarching economic objective is supported by Chapter 6, which emphasises that significant weight must be given to supporting economic growth and productivity, and that local business needs and wider opportunities for development must be taken into account.

4.6 Chapter 7 of the NPPF seeks to ensure the ongoing vitality of town centres. In particular, within this chapter, Paragraphs 86 to 91 promote and support new development and investment within the defined boundaries of town centres, recognising that town centres are the heart of communities. Where town centres are in decline, the NPPF directs local planning authorities to plan positively for their future to encourage economic activity. The NPPF recognises the need for local authorities to promote the vitality and viability of their towns and cities through the promotion of competition and growth management.

4.7 Specifically, Paragraph 87 requires local planning authorities (LPAs) to enforce a sequential approach when assessing planning applications for main town centre uses located outside of existing centres or not in accordance with an up-to-date Local Plan. To do this, local authorities should require applications for main town centre uses to be located in town centres, then in edge of centre locations and only if suitable sites are not available should out-of-centre sites be considered. When reviewing edge of centre and out-of-centre proposals, they should give preference to accessible locations well connected to the town centre.

4.8 Paragraph 90 specifies that LPAs should require an impact assessment for retail and leisure development outside of town centres that are not in accordance with an up-to-date Local Plan and if the development is over a proportionate, locally set threshold. Where there is no locally defined threshold, the default threshold will be 2,500 sq m. The impact assessment should assess:

i the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal, and

ii the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made.

4.9 In summary, the NPPF endorses a 'town centre first' approach to all retail activity (including leisure). It stipulates that where retail and leisure proposals cannot be accommodated within, or, adjacent to the town centre, applicants have to demonstrate, through the dual application of the impact test and the sequential test, which the development will not affect negatively upon the vitality and viability of town centres.

National Planning Policy Guidance

4.10 The NPPG for 'Town Centres and Retail' (last updated 18 September 2020) sets out further practical details of the Government's aspirations on town centres. The NPPG:

- Encourages a wide range of complementary uses in town centres, such as residential, employment, entertainment/leisure, healthcare and education uses, as well as temporary activities such as 'pop ups'.
- Recognises the potential for evening and night-time activities to increase economic activity, employment and diversification and to develop the 'unique brand' of a town centre.

- Promotes stakeholder engagement and involvement in shaping town centres, including the activities of Business Improvement Districts (BIDs), Local Economic Partnerships (LEPs), landowners and private sector businesses.
- Recommends Town Centre Strategies which are realistic based on the likely role and function of the centre, and which identify an appropriate mix of uses, the likely scale of need, and opportunities for improvement, including to the historic and natural environment.

4.11 In July 2019, additional indicators were added to the NPPG's list for planning for town centres and high streets, including balance between independent and multiple stores, barriers to new businesses opening and existing businesses expanding, and opening hours and extent to which there is an evening and night time economy offer.

The Town and Country Planning (Use Classes) & (General Permitted Development) Orders

4.12 In recent years, the Government has focussed considerable effort on trying to promote town centres through Permitted Development Rights. In addition to traditional 'rights' to switch between Use Classes within Use Class A in accordance with the General Permitted Development Order 2015 (GPDO), more recent rights have been granted in order to help diversify town centres and in order to reflect changing economic pressures. These include, subject to Prior Approval, the ability to convert a large number of uses to residential. Uses can include shops, financial and professional services, amusement arcades and casinos. There is also the commonly utilised ability to change office premises to residential.

4.13 To support new ventures and pop-ups and avoid buildings being left empty, a separate permitted development right allows a range of uses (such as offices, shops, financial and professional services, restaurants and cafes, hot food takeaways, assembly and leisure uses) to convert temporarily to another use (such as office, shop, financial and professional service, restaurant) for a single continuous period of up to three years. This right allows start-ups to test a new business model, and then to seek planning permission for the permanent change of use on that or another site. The same right now allows for the temporary change of use to specified community uses (health centre, art gallery, museum, public library, public hall or exhibition hall) to provide a greater mix of uses on the high street and increase footfall, and bring community uses closer to communities.

4.14 These permitted development rights are an important component in the re-shaping of a number of town centres throughout the UK. Symptomatic of this, the Government announced in June 2020 plans to introduce a new use class for 'commercial, service and business' in town centres. This proposal would simplify the process of switching between such uses in town centres. Consequently, The Town and Country Planning (Use Classes) Order 1987 was amended on 22 July 2020, and came into force in England on 1 September 2020 as the Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020. The amendments to the Use Classes Order included revoking Parts A and D and introducing three new use classes (Class E, F1 and F2).

4.15 These amendments mean that uses previously falling into Use Class A1, A2 and A3 (such as shops, and restaurants), Use Class B1 (including offices), and specific uses within Use Classes D1 and D2 (such as gyms, doctors' surgeries and nurseries) are now combined within a single Use Class (Class E: 'Commercial, Business and Service').

4.16 Additional Use Classes F1: 'Learning and non-residential institutions' and F2: 'Local community' have also been created, amalgamating a number of previous Use Classes. In particular, new Use Class F1 covers any use (not including residential) for the provision of education, display of works of art, museum, public library, public reading room, public hall, exhibition hall, for or in connection with public worship or religious instruction or as a law court. New Use Class F2 covers a shop selling mostly essential goods, including food, no larger than 280 sq m and where there is no other such facility within 1,000m radius of the shop's location; a hall or meeting place for the local community; an area or place for outdoor sport or recreation, not involving motorised vehicles or firearms; and an indoor or outdoor swimming pool or skating rink.

4.17 In practice, because changes within a single Use Class would not constitute development, this means a number of new changes of use can be carried out without the need for planning permission, notwithstanding any amendments to frontages and signage. Most notably, within Class E, a large shop can now freely change to a gym, an office, a restaurant, a nursery and any combination thereof.

4.18 The amendments also took a number of uses (such as pubs and bars, takeaways, music venues and cinemas) out of the Use Class Order, categorising them as 'Sui Generis' uses. Each of these uses now need planning permission for any changes to their use, providing further protection to valued local facilities (such as pubs) and further controls for town centres against potentially unwanted uses (such as takeaways).

4.19 In March 2021, an update was made to the GPDO setting out the Permitted Development Rights associated with Class E. Class MA allows for the change of use of these Class E properties to residential from August 2021 (extending a right that had previously been restricted to office uses using Class O). This permitted development right is subject to maximum size requirements, the property having been in use as Class E for 2 years and vacant for 3 months, as well as an application to the Council for 'Prior Approval' for limited consideration of impacts related to transport, contamination, flood risk, noise, the provision of natural light, and the potential effect of providing residential accommodation within an industrial area. Further limitations apply in Conservation Areas and for nurseries, as well as in areas covered by 'Article 4 directions' where the rights do not apply.

4.20 Article 4 directions are issued under article 4 of the GPDO, and allow for Councils to withdraw permitted development rights from defined areas. However, after notifying the Secretary of State of their intention to make an Article 4 directions, the Secretary of State can intervene and modify or cancel an Article 4 if the direction is not considered to be justified.

4.21 In July 2021, paragraph 53 the NPPF was updated setting out updated limitations for the use of Article 4 directions:

The use of Article 4 directions to remove national permitted development rights should:

- *where they relate to change from non-residential use to residential use, be limited to situations where an Article 4 direction is necessary to avoid wholly unacceptable adverse impacts (this could include the loss of the essential core of a primary shopping area which would seriously undermine its vitality and viability, but would be very unlikely to extend to the whole of a town centre)*
- *in other cases, be limited to situations where an Article 4 direction is necessary to protect local amenity or the well-being of the area (this could include the use of Article 4 directions to require planning permission for the demolition of local facilities)*
- *in all cases, be based on robust evidence, and apply to the smallest geographical area possible.*

4.22 It should be noted that any existing Article 4 directions that currently restrict office-to-residential changes under the old GPDO Class O will still 'bite' until July 2022, so Councils have the opportunity to propose new article 4 directions.

Uttlesford District Council Development Plan

4.23 The Uttlesford Local Plan was adopted in 2005. Since its adoption, there have been a series of side documents which update the Local Plan, including updated advice on Conservation Areas and Parking Standards, but there have been no material updates to retail policies. The Local Plan is read in conjunction with the supporting Proposals Maps.

4.24 A replacement plan was submitted for examination but subsequently withdrawn in May 2020, in light of the Examiners comments on the soundness of the Plan.

4.25 The Council are therefore currently preparing a new Local Plan, and this Study will form part of the evidence base for that plan. A 'call for sites and strategic land availability assessment' was launched earlier in 2021 and this forms the first stage of making the new Plan.

Uttlesford District Local Plan (2005)

4.26 The adopted Local Plan pre-dates the National Planning Policy Framework. Its retail policies are therefore largely outdated and will need a thorough overhaul under the Plan Review. We consider this matter in more detail in Section 6.

4.27 Those policies of the 2005 Plan which are most relevant to retail matters include:

- Policy RS1 – Access to Retailing and Services – which sought to make properties accessible to all, in order to ensure social inclusion;
- Policy RS2 – Town and Local Centres – which permitted the development of town centre uses in the centres of Saffron Walden, Great Dunmow, Stansted Mountfitchet and Thaxted, provided those developments do not harm the role of the centres, their historic character, other commercial activity, the supply of homes, or prejudice the use of upper floors for living or business accommodation; and
- Policy RS3 – Retention of Retail and other Services in Rural Areas – which sought to resist the loss of community facilities in rural locations.

Neighbourhood Plans

4.28 Uttlesford District has four 'made' Neighbourhood Plans, which are as follows:

- Felsted - adopted 2020;
- Great Dunmow – adopted 2016;
- Newport and Quendon & Rickling – adopted 2021; and
- Thaxted – adopted 2019.

4.29 This Study is primarily concerned with the four centres of Saffron Walden, Great Dunmow, Stansted Mountfitchet and Thaxted. We therefore examine the Great Dunmow and Thaxted Neighbourhood Plans below.

Great Dunmow Neighbourhood Plan

4.30 The Great Dunmow Neighbourhood Plan considers general strategy as well as detailed policies for 'the High Street and Town Centre'. The Plan specifically notes that whilst the town centre forms the "*backbone of the town*", the fact that most of its car parks carry car parking charges "*is seen by local residents and High Street businesses as very damaging to efforts to support the Town Centre*".

4.31 The detailed 'positions' and policies of the Plans seek to achieve the following:

- HSTC-A – High Street Retail Character – to ensure the High Street is a genuine market town with a supporting range of independent shops and services.
- HCTC1 – Uses and Variety – 35% of the frontage must remain in Class A1 use. Only up to 5% of the primary shopping frontage and 10% of the secondary shopping frontage shall he dedicated to Class A5 (hot food takeaway) use. The conversion of ground floor units to residential in the High Street will not be permitted.
- HCTC-B – Accessibility – Good access by a range of modes of transport will be encouraged, as well as the maintenance and signposting of all routes.
- HCTC2 – Coach Park – Development proposals which support the Coach Park site will be encouraged provided they offer easy and safe access to the Town Centre and are not detrimental to the environmental character of the area.
- HSTC-D – Market – the market is an important part of the shopping experience and will be supported in every way possible.

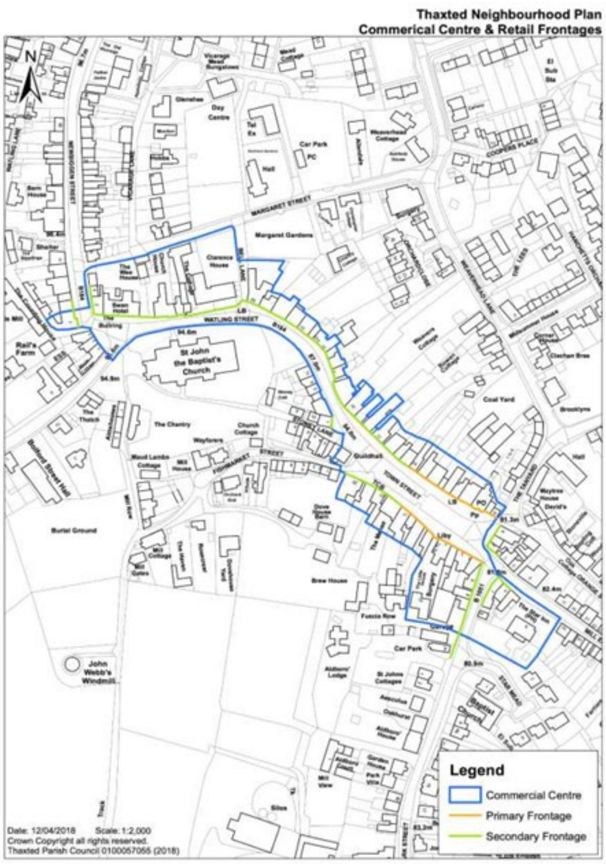
- HCTC-E – Town Centre Development – development and improvement in general will be actively promoted. The Neighbourhood Plan will be reviewed and updated as strategies develop.

Thaxted Neighbourhood Plan

4.32 The Thaxted Neighbourhood Plan considers a series of town centre focussed policies, which are accented towards protecting the Town Centre Conservation Area, as follows:

- Policy TX HC3 – Shop Fronts – should contribute to the character and appearance of the Conservation Area.
- Policy TX HC4 – Protection of Retail Uses – Supports the diversification and enhancement of shops, services and community facilities, where they preserve or enhance the Conservation Area.

4.33 The Plan includes a "Map of the Commercial Centre" (MAP 4) which designates the boundary of the Commercial Centre, as well as Primary and Secondary Frontage.



Local Plan Evidence Base

4.34 This Retail Capacity Study will supersede the relevant existing evidence base documents for Uttlesford District, including the Uttlesford Retail Study (2016) and Retail Study Update (2018), prepared by Savills.

Uttlesford Retail Study Update 2018

4.35 The Retail Study Update was underpinned by a household telephone survey of 1,000 samples and was carried out by NEMS Market Research in March/April 2016. The survey covered 6 Zones. Savills then extrapolated market share findings from those surveys to calculate the capacity for convenience and comparison goods through to 2033.

4.36 The findings of the Uttlesford Retail Study Update 2018 can be summarised as follows:

- Convenience Goods – There was very little leakage of expenditure outside of the District identified and Uttlesford is relatively well served in terms of main food shopping facilities. However, by the end of the horizon considered (2033), capacity might exist for large foodstore in Great Dunmow, as well as a small to medium sized foodstore in Saffron Walden. Preference in both cases would be for a sites in, or on the edge of, the town centres.

- Comparison Goods – Capacity exists by 2033 to support a further c4,500 sq m net of new floorspace in Saffron Walden, ideally to be located in the Town Centre. No capacity exists for additional comparison goods floorspace in any of the other centres through to 2033.

5 Capacity Assessment

Introduction

5.1 This section defines the Study Area and describes the Household Survey undertaken to inform this study. It summarises the key findings on internet shopping patterns, and delves into the survey-derived market share analysis for convenience and comparison goods spending at 'bricks and mortar' locations.

5.2 We also set out the results of our quantitative capacity assessment for new retail (comparison and convenience goods) floorspace in Uttlesford District, covering the period from 2021 to 2040. This section also considers the future capacity for food and beverage floorspace over the same timeframe.

Household Telephone Survey & Study Area

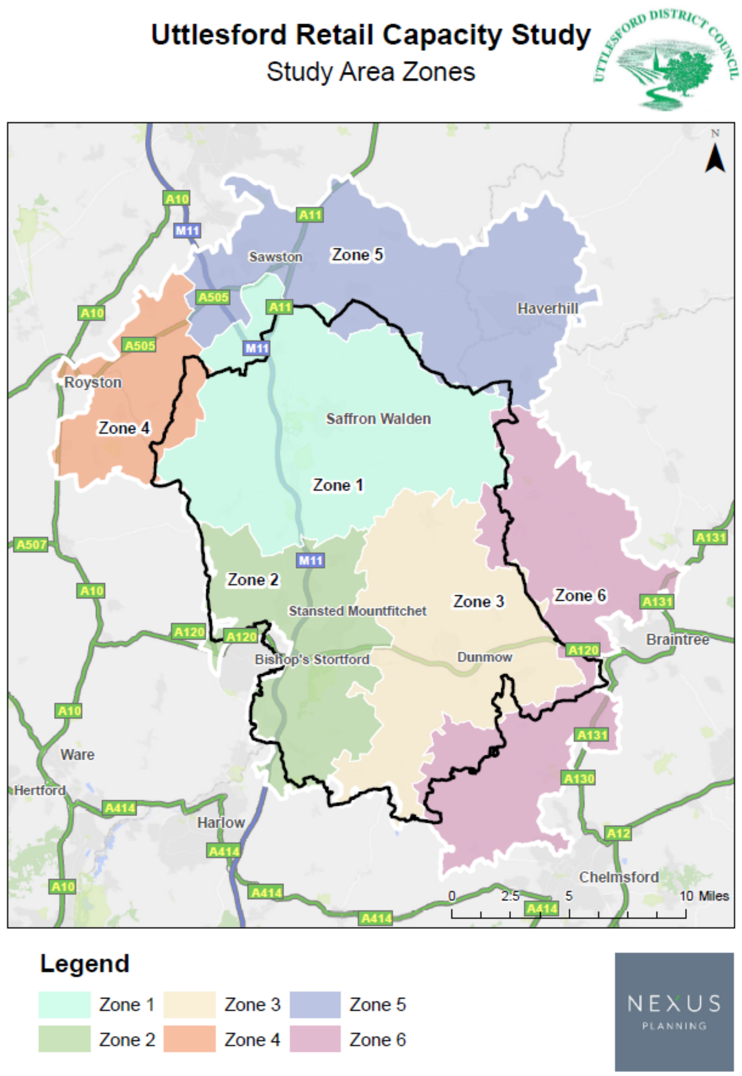
5.3 Household Surveys are recognised across the retail industry, and within planning policy guidance, as an excellent means of understanding where people within a specified area carry out their retail and leisure expenditure. We have therefore commissioned a new Household Telephone Survey and utilise the results to inform our quantitative analysis of the turnover of specific retailers, towns and other destinations, as well as its qualitative findings on attitudes and perceptions of different centres.

5.4 It is important to identify a Study Area that covers the key area of interest. It is usually the area within which you would expect the resident population of the District to carry out the majority of its retail spending.

5.5 This Study Area is shown on the plan in Figure 5 below, and at **Appendix A**. The Study Area is defined by postal sector geography in order to allow analysis by sub-areas (or 'Zones'), and to allow NEMS to obtain accurate samples.

5.6 In this instance, we have utilised the same Study Area as the Uttlesford Retail Study 2016 (as updated in 2018). This enables us to directly compare and contrast the results gained in 2016 with those found in 2021. Savills adopted a naming convention of Zones 1a, 1b, 2a, 2b, 3 and 4 in their Study. Zones 1a, 2a and 3 were those which broadly comprised the Uttlesford District Area. The only difference between the Savills study, and our own Study in this respect, is that we have simplified the naming conventions, so that our Zones read 1-6, with Zones 1-3 broadly comprising the Uttlesford District area (see Figure 4).

Figure 4. Study Area Zonal Plan



5.7 Accordingly, the Study Area comprises 6 Zones and a total of 1,002 household surveys interviews took place across the 6 Zones. This is corroborated for its statistical accuracy, relative to population, by NEMS in their report in **Appendix B**. Figure 5 below sets out the postcode sectors which comprise each Zone.

5.8 The wording of the questions was also cognisant of the Covid-19 pandemic, as can be seen by the full questionnaire results in **Appendix B**. Respondents were asked where they 'usually' shop to avoid, as far as possible, the recording of any unusual travel patterns, and a number of additional questions were asked about how people changed their shopping and leisure patterns as a result of Covid-19.

5.9 A full description of the research methodology, sampling size, weightings and sample profiles is contained at the beginning of the NEMS report. NEMS quote their work as being within a 95% confidence range.

Figure 5. Study Area Postal Sectors

Zone	Postal Sectors	Household Survey Interviews
1 | Uttlesford North	CB10 1, CB10 2, CB11 3, CB11 4	169
2 | Uttlesford West	CM22 6, CM22 7, CM23 1, CM24 8	129
3 | Uttlesford East	CM6 1, CM6 2, CM6 3, CM6 4	147
4 | Western Fringe	SG8 7, SG8 8	101
5 | Northern Fringe	CB21 4, CB21 6, CB22 3, CB22 4, CB9 0, CB9 7, CB9 8, CB9 9	277
6 | Eastern Fringe	CM1 4, CM3 1, CM7 4, CM7 5, CM77 6	179
Study Area Total		1,002

Source: Appendix B

Study Area Population

5.10 The population for each zone in 2021, 2025, 2030 and 2035 is sourced from Experian MMG3 data (2020 report). Population figures for 2040 have been projected by Nexus Planning by using the Experian MMG3 (2020 report) population trends. We present the population projections on a Zone-by-Zone basis in Figure 6 below.

Figure 6. Population Projections

Zone	2021	2025	2030	2035	2040	Growth 2021-2040
Zone 1	35,214	36,537	37,927	39,064	40,103	13.9%
Zone 2	27,042	28,319	29,733	30,876	31,935	18.1%
Zone 3	30,692	32,004	33,381	34,486	35,518	15.7%
Zone 4	11,527	11,843	12,119	12,331	12,579	9.1%
Zone 5	57,269	58,256	59,230	60,212	61,273	7.0%
Zone 6	37,036	37,769	38,608	39,424	40,168	8.5%
Total Study Area	**198,780**	**204,728**	**210,998**	**216,393**	**221,576**	**11.5%**

Source: Table 1, Appendix C

Non-Store Retailing or Special Forms of Trading

5.11 Special forms of trading (SFT) are defined by Experian as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies.

Convenience Goods Online Shopping

5.12 The household survey asked residents of the Study Area where they normally undertake their main food and grocery shopping.

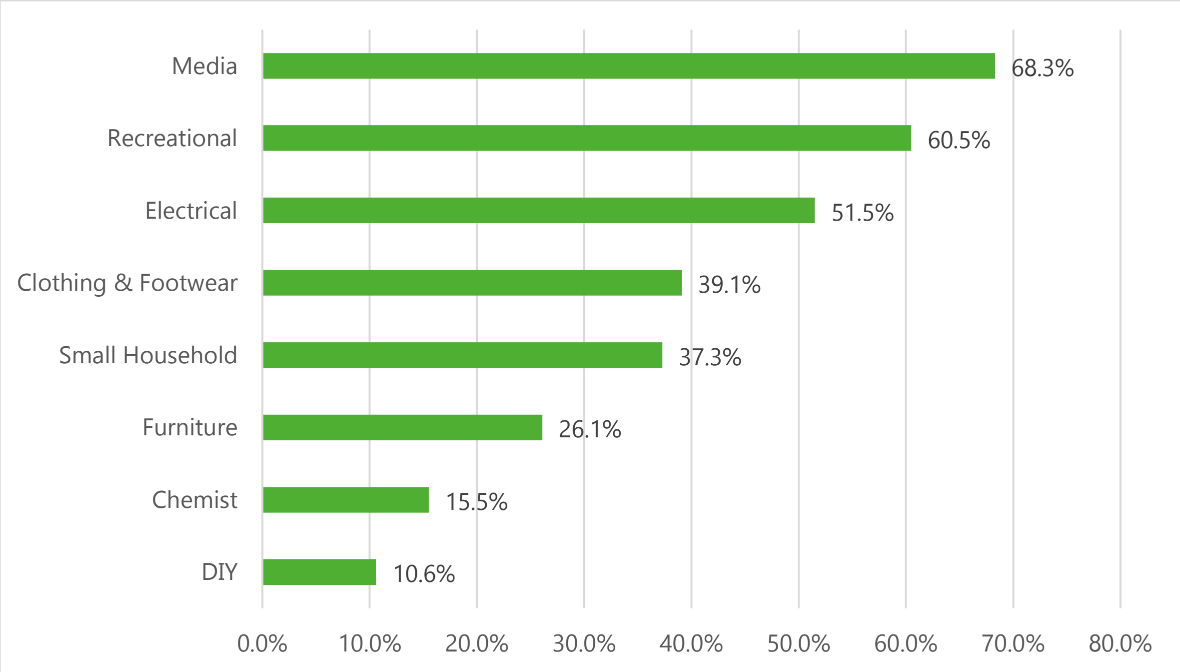
5.13 Across the Study Area, 14.8% of respondents usually shop online for their main food shop (Question 1 of the Household Survey). As set out in Section 2, the UK average for online convenience shopping in 2021 is 18.1%. As such, the take-up of online convenience shopping in the Study Area is lower than the UK average. The online trade across the Study Area is dominated by Tesco (53.2%), Ocado (24.4%), and Sainsbury's (17.1%), who together account for 94.7% of all online convenience goods spending.

5.14 The household survey also asked residents of the Study Area about how their online convenience shopping habits have been affected by Covid-19. Before the first lockdown, 31.0% of Study Area residents had shopped for groceries online at some point. During the lockdowns, this number increased to 46.4%. Since the lockdown has been lifted, the number using online services has decreased slightly to 40.0%, but remains significantly higher than before lockdowns. This suggests that Covid-19, and in particular the lockdowns, had resulted in a lasting habitual change in the Study Area, whereby a preference for online grocery shopping has increased.

Comparison Goods Online Shopping

5.15 The household survey asked where respondents usually shop for different types of comparison goods. The findings are presented in Figure 7 which shows the take-up for online shopping varying across the categories from 10.6% (DIY) to 68.3% (Media). On average, within the Study Area, 37.7% of respondents shop online for comparison goods, compared with a UK average of 29.1%.

Figure 7. Online Comparison Goods Spending in the Study Area, 2021



Source: NEMS Household Survey

5.16 The household survey also asked residents of the Study Area about how their online comparison-shopping habits have been affected by Covid-19. Before the first lockdown, 84.1% of Study Area residents shopped for comparison goods online. During the lockdowns, this number increased slightly to 85.5%. Since the lockdowns have been lifted, this figure has risen slightly again to 87.2%. Whilst the differences are marginal, and significantly less pronounced than the increase in convenience goods spending online, the base figures were already substantially higher with online comparison goods spend. The fact that online spend has increased since the lockdown was lifted is also notable, and confirms the general upwards trend in online comparison goods spend forecast by Experian (see Section 2).

5.17 Overall, when comparing pre-lockdown and post-lockdown frequency of online shopping, 15.9% of Study Area residents now shop online more often; 69.9% shop with the same frequency; and 6.2% shop online less often (8.0% were not able to give an answer). As would be expected, as the overall preference for online shopping has increased, the frequency of online shopping has also increased.

Retail Expenditure Forecasts

5.18 Having examined where online spending is focused, we now examine that proportion of spending which is carried out at 'bricks and mortar' stores.

5.19 Retail expenditure data has been sourced from our in-house Experian MicroMarketer G3 system. We obtain separate data for convenience and comparison goods, which in turn are broken down into multiple goods categories, as set out in our full statistical assessment in **Appendix C.**

5.20 The data takes account of the socio-economic characteristics of the local population to provide local consumer expenditure calculations. Experian is a robust source of population and expenditure data that is widely used for calculating retail capacity across the industry.

5.21 Expenditure data from Experian is provided per capita in 2019 prices, as is every subsequent monetary value. Using the growth rates presented in Table 6 of Experian Retail Planner Briefing Note 18 (October 2020), which are reproduced in Figure 8 below, the per capita expenditure is then projected forward to the base year (2021) and the relevant assessment years. Adjustments are made at every step to account for the growth in special forms of trading (SFT).

5.22 There are two elements that should be noted here:

- Experian notes that long-term forecasts should be treated with caution, and that they should be subject to regular reviews given the wide range of factors that can influence the broader national economy. Experian produces annual updates to reflect this, and as we go on to discuss in our recommendations later in the report, we would advise that some of the expenditure data inputs (e.g. growth rates and base per capita spending figures) to this report be re-visited ahead of the Plan Examination in recognition of the exceptionally turbulent economic times surrounding both Covid-19 and Brexit, the full implications of which have yet to be realised at the time of writing.
- Special forms of trading (SFT) are defined by Experian as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies. As we have mentioned previously. Experian Retail Planner Briefing Note 18 (October 2020) provides estimated year-on-year forecasts of internet and other SFT, which allows us to 'strip out' any expenditure that is, either now or in the future, diverted to SFT. This ensures that the increasing propensity to

shop by SFT is accounted for in our modelling. These increasing deductions for SFT have the effect of off-setting some of the growth in expenditure in the Study Area derived from population increases. Furthermore, many brands offer online sales, but source the goods from their own stores' shelves. This is often the case for food stores where employees will pick online orders from stores' shelves before, during or after opening hours. These orders are then delivered by dedicated vans from each store and as such, the online expenditure is attributed to tangible stores. Experian provides 'adjusted' figures to account for this.

Figure 8. 'Adjusted' Special Forms of Trading Market Share Forecasts

Year	Convenience growth rates (%)	Comparison growth rates (%)
2021	-5.3	8.1
2022	0.2	2.9
2023	-0.3	2.7
2024	-0.2	2.0
2025	-0.1	1.9
2026	-0.2	2.0
2027	-0.2	2.1
2028	-0.1	2.3
2029	-0.1	2.4
2030	-0.2	2.5
2031	-0.1	2.5
2032	0.0	2.5
2033	0.0	2.6
2034	0.0	2.6
2035	0.1	2.7
2036	0.0	2.7
2037	0.0	2.7
2038	0.1	2.8
2039	0.1	2.7
2040	0.0	2.7

Source: Figure 6, Experian Retail Planner Briefing Note 18, October 2020

5.23 The expenditure per capita figures are then multiplied by the population of each zone at each of the assessment years. Figure 9 below sets out the resultant outcome of the total 'brick and mortar' comparison and convenience expenditure in the Study Area at the base and assessment years.

Figure 9. Retail Expenditure Forecasts in the Study Area (£m)

Zone	2021	2025	2030	2035	2040	Growth 2021-2040
Convenience	451.2	462.9	473.4	485.5	498.2	10.4%
Comparison	647.6	733.0	845.1	984.7	1,153.3	78.1%

Source: Tables 2a & 8, Appendix C

Convenience Goods Findings

Market Shares

5.24 Before considering the capacity for new convenience goods floorspace, we firstly examine the overall convenience goods spend by residents across the Study Area. Figure 10 specifically examines where Study Area residents are spending their money.

5.25 The results show that destinations in Uttlesford District account for 39.7% (£179.2m) of the spending of all Study Area residents in 2021 (£451.2 m per annum). The remaining 60.3% (£272.0m) of spending carried out by residents of the Study Area, takes place at destinations beyond Uttlesford District.

Figure 10. Convenience Goods Market Share by Destination

Destination	Total Market Share Convenience (%)	Total Market Share Convenience (£m at 2021)
Saffron Walden Town Centre	6.7%	£30.2m
Stansted Mountfitchet Local Centre	1.5%	£6.7m
Great Dunmow Town Centre	1.1%	£4.9m
Thaxted Local Centre	0.2%	£1.1m
Other Local Centres/Villages	2.7%	£12.2m
In-centre Sub-total	12.2%	£55.0m
Saffron Walden out-of-centre	16.0%	£72.0m
Great Dunmow out-of-centre	11.6%	£52.3m
Uttlesford District Total	**39.7%**	**£179.2m**
Haverhill	18.2%	£80.2m
Elsewhere in the Study Area	2.5%	£11.0m
Chelmsford	6.2%	£28.1m
Royston	5.8%	£26.1m
Harlow	1.1%	£5.1m
Cambridge	3.6%	£16.3m
Bishops Stortford	10.4%	£46.9m
Braintree	9.7%	£43.7m
Others outside the Study Area	2.8%	£12.7m
Total	**100.0%**	**£451.2m**

Source: Figure 6, Experian Retail Planner Briefing Note 18, October 2020

5.26 Uttlesford attracts 39.7% of all convenience goods spending in the Study Area (£179.2m). The majority of convenience goods spending in Uttlesford is carried out in out-of-centre locations in Saffron Walden and Great Dunmow (£124.3m).

5.27 Of the £179.2m per annum spent in Uttlesford, its town centres and villages account for £54.8m of spend. This equates to 30.6% of all spend carried out in the District.

5.28 The most popular destinations within the District are Tesco in Great Dunmow (£52.3m per annum), Tesco in Saffron Walden (£42.5m), Aldi in Saffron Walden (£29.2m) and Waitrose in Saffron Walden (£27.8m).

5.29 In terms of destinations outside the District, the highest collective attractors of convenience goods spend from residents of the Study Area are foodstores in Haverhill (£82.3m per annum), Bishops Stortford (£46.9m) and Braintree (£43.7m).

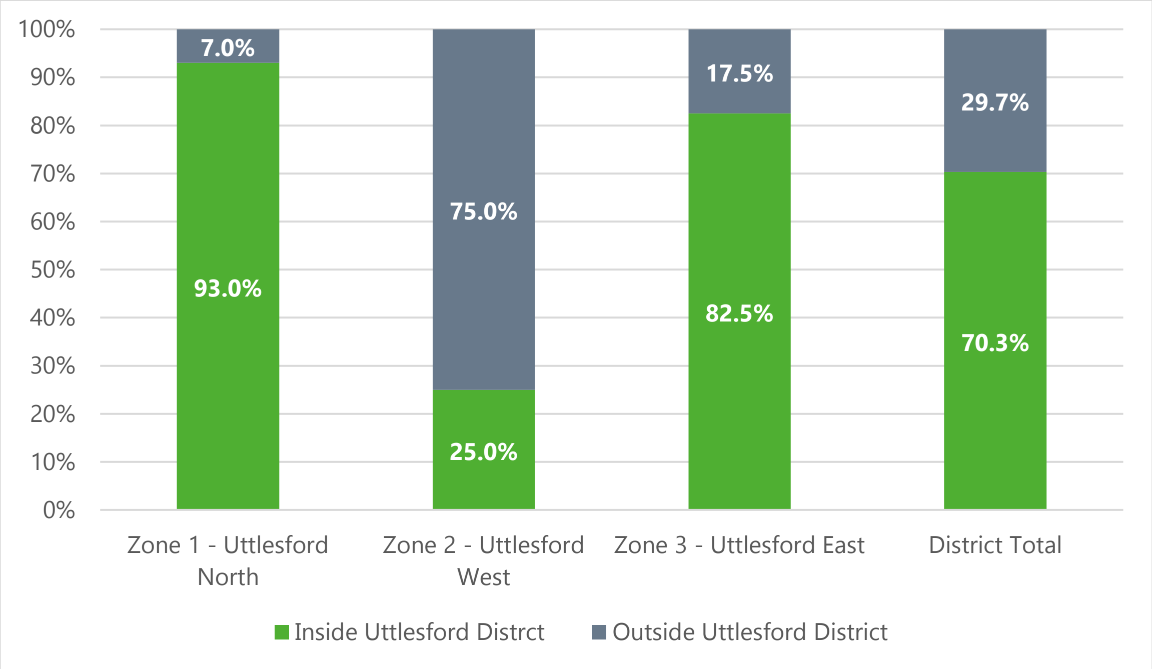
5.30 Importantly, we can also examine the destination of convenience goods spend within each Zone of Uttlesford District. This is a key indicator and shows the amount of Uttlesford District residents spend which is 'retained' within the District, and the amount which is 'leaked' elsewhere.

5.31 This District very closely aligns with Zones 1, 2 and 3 of the survey. Figure 11 examines the amount of convenience goods spending carried out inside Uttlesford District by residents of each Zone.

5.32 The results show that there are healthy levels of retention in both Zones 1 and 3 (Uttlesford North and Uttlesford East), with 93.0% and 82.5% retention respectively. There is though a different picture in Zone 2 (Uttlesford West), where only 25.0% of convenience goods spend is retained within the District. The results in Table 4 at Appendix C highlight that 66.3% of all convenience goods spend by residents of Zone 2 is carried out in Bishops Stortford.

5.33 Overall, the District retains 70.3% of the convenience goods spend of its residents (£150.4m out of £214.1m per annum).

Figure 11. Convenience Goods Market Share by Destination



Source: Appendix C, Table 3

5.34 Turning to individual retail destinations, where national company averages are available for benchmarking purposes, we are able to compare local turnover to the turnover of an average store of that size in order to identify where facilities may be trading over or below expectations. This is summarised at Figure 12, including assumptions for the inflow of trade.

Figure 12. Convenience Goods Turnover Benchmarking

Destination	Benchmark Turnover (£m)	Survey Turnover inc. inflow (£m)	Trading Position against Benchmark (£m)	Trading Position against Benchmark (%)
Saffron Walden Town Centre	£31.2m	£31.7m	£0.5m	1.7%
Great Dunmow Town Centre	£8.3m	£4.9m	-£3.4m	-41.6%
Stansted Mountfitchet LC	£8.8m	£6.7m	-£2.1m	-23.9%
Thaxted Local Centre	£1.1m	£1.1m	£0.0m	0.0%
Other Local Centres/Villages	£10.8m	£12.0m	£1.2m	10.9%
Saffron Walden Out-of-centre	£43.1m	£72.0m	£28.9m	67.1%
Great Dunmow Out-of-centre	£28.5m	£52.3m	£23.8m	83.5%
Uttlesford District	**£131.8m**	**£180.7m**	**£48.9m**	**36.0%**

Source: Table 5, Appendix C

5.35 The results show that the convenience floorspace in Uttlesford District is performing well when considered cumulatively. Facilities in the District are trading at an average of 36.0% above benchmark. This is driven by the very strong performance of the out-of-centre Aldi store in Saffron Walden, and the Tesco stores in Great Dunmow and Saffron Walden. These three stores are trading at 146.3%, 83.5% and 37.3% above company average trading levels respectively.

5.36 Of the Town Centres, Saffron Walden is performing at around benchmark, whilst the smaller stores in Great Dunmow and Stansted Mountfitchet appear to be trading at below average levels. The lack of national multiple retailers in Thaxted means that it is not possible to prepare a meaningful benchmark exercise.

5.37 We summarise below the performance of individual stores in Uttlesford, with Figure 13 setting out the 'Top 3' best and worst performing stores.

Figure 13. Best and Worst Performance Benchmarking

Destination	Benchmark Turnover (£m)	Survey Turnover inc. inflow (£m)	Trading Position against Benchmark (£m)	Trading Position against Benchmark (%)
Best Performing				
Aldi, Saffron Walden	£11.9m	£29.2m	£17.4m	146.3%
Tesco, Great Dunmow	£28.5m	£52.3m	£23.8m	83.5%
Tesco, Saffron Walden	£31.0m	£42.5m	£11.6m	37.3%
Worst Performing				
Co-op, Great Dunmow	£7.4m	£4.0m	-£3.4m	-45.7%
Co-op, Stansted Mountfitchet	£4.5m	£2.7m	-£1.8m	-39.4%
Nisa, Saffron Walden	£1.7m	£1.4m	-£0.3m	-19.3%

Source: Table 5, Appendix C

Local Market Share Trends – Convenience Goods

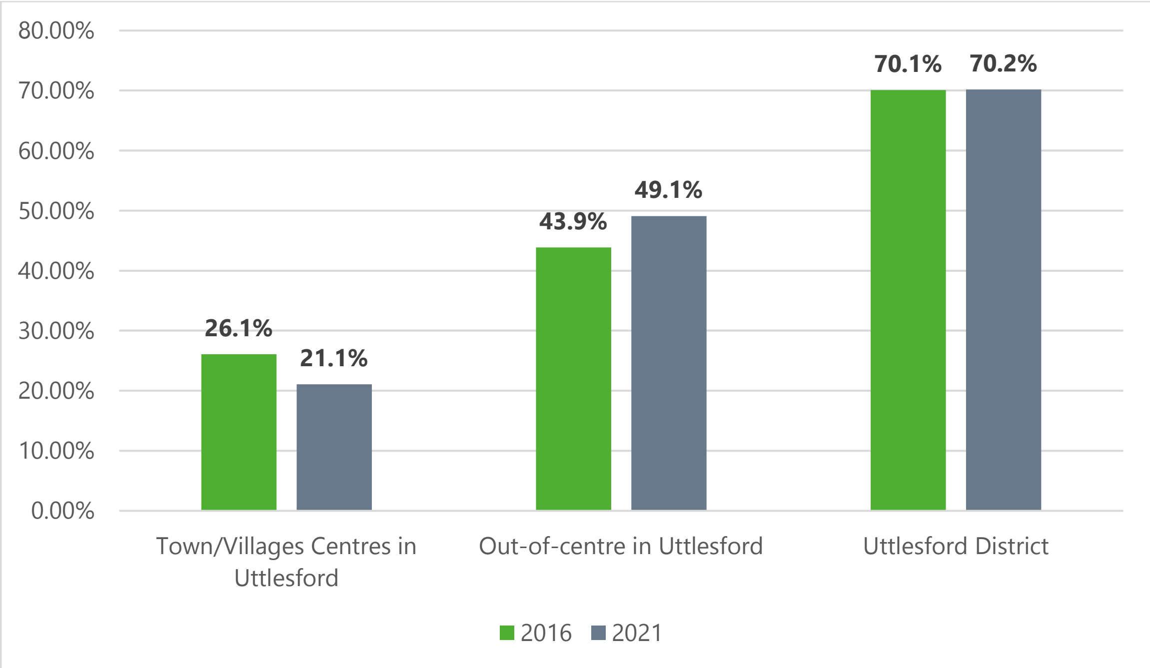
5.38 Figure 14 sets out a comparison of 2021 market share data against the findings of the 2018 Uttlesford Retail Study Update (informed by 2016 survey data). This data consider the spending of residents in Zones 1-3 only, which broadly comprises the area of Uttlesford District.

5.39 Overall, we identify a relatively consistent position over the past 5 years (2016-2021). There has been a very slight increase in the 'retention' of Uttlesford residents' convenience goods spend, from 70.1% in 2016 to 70.2% in 2021. This has been driven by an increase in market share to out-of-centre foodstores, which now have a 49.1% market share, compared to 43.9% in 2016.

5.40 By contrast, there has though been a reduction on the market share of Uttlesford residents' convenience goods spending in its town and villages centres (21.1% of trade, down from 26.1% in 2016).

5.41 The overall picture is therefore mixed. Whilst the District has retained an equivalent proportion of its own residents' spend as a whole, that spend is increasingly being carried out in out-of-centre locations, to the likely detriment of town centre locations.

Figure 14. Convenience Goods Market Share from Uttlesford Residents (2016-2021)



Source: Appendix C & Uttlesford Retail Study 2018 (Appendix 7, Table 6)

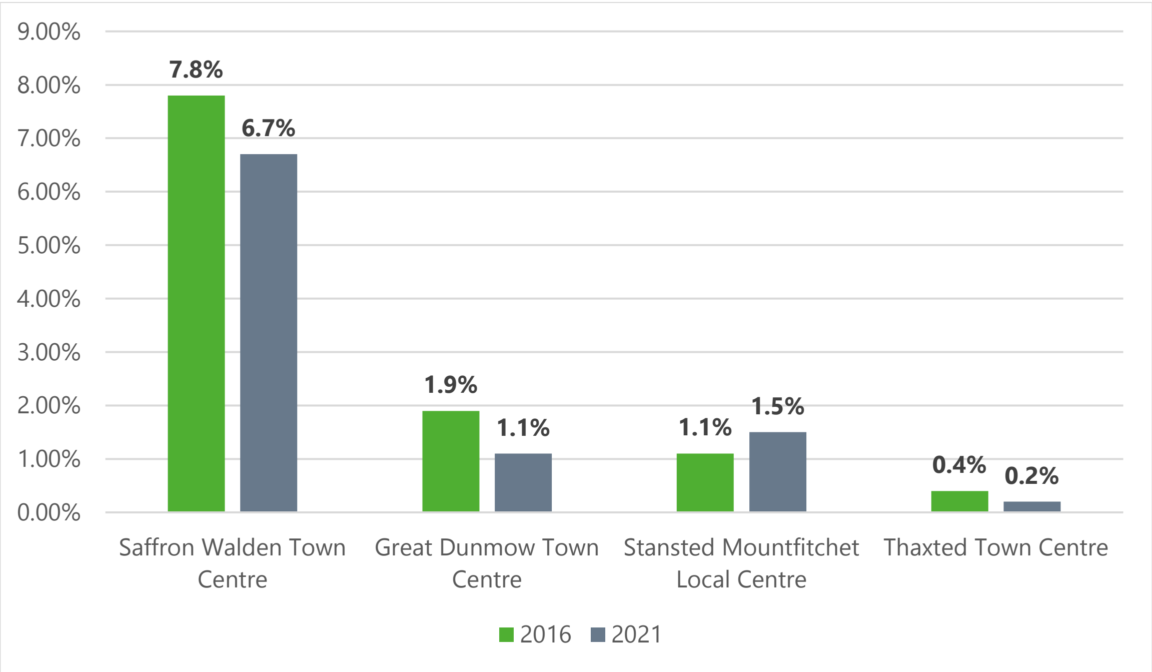
5.42 Building on this, Figure 15 examines the market shares attracted to individual centres in 2021, against the comparative assessment in 2016. The results show that there has been a reduction in convenience goods market share over this period in Saffron Walden, Great Dunmow and Thaxted Town Centres. In contrast, there has been an increase in convenience goods market share in Stansted Mountfitchet Town Centre.

5.43 Looking at the larger foodstores which underpin Saffron Walden Town Centre and Great Dunmow Town Centre, it is notable that the Waitrose in Saffron Walden has experienced a decrease in market share from 7.4% of Study Area spend in 2016, to 6.2% in 2021, whilst the Co-op store in Great Dunmow has experienced a fall from 1.5% of Study Area spend in 2016, to 0.9% in 2021.

5.44 This in quite sharp contrast to the performance of out-of-centre competitors over the same period. The Tesco and Aldi stores in Saffron Walden have seen their market shares increase from 6.3% and 5.2% in 2016, to 9.4% and 6.5% respectively by 2021. There is therefore evidence to suggest a transfer of market share from in-centre to out-of-centre stores in the Saffron Walden area.

5.45 There is a slightly different picture in Great Dunmow, where the Tesco store has held its market share (11.7% in 2016, and 11.6% in 2021). Set against the falling market share of the Town Centre, this suggests that there has been an overall increase in the amount of spend which is being 'leaked' from the local area to destinations elsewhere. We consider this point further in our recommendations in Section 6.

Figure 15. Convenience Goods Market Share from the Study Area by Destination (2016-2021)



Source: Appendix C & Uttlesford Retail Study 2018, Appendix 7, Table 6

Convenience Goods Capacity

5.46 One of the key aims of this Study is to provide recommendations on the capacity for new retail floorspace over the plan period to 2040. The use of long-term projections should be treated with caution and reviewed regularly in order to test the accuracy of the forecasts against emerging datasets. External national and international factors can influence the wider performance of the economy, which can have trickle down effects on local shopping patterns. As discussed in Section 2, one such example has been the economic implications of the United Kingdom leaving the European Union and the social distancing and lockdown measures necessitated current Covid-19 pandemic.

5.47 Importantly, we also note that any quantitative retail capacity that we may identify across the Study Area does not necessarily equate to justification for new retail floorspace in itself (especially in out-of-centre locations), and any such development would be required to be assessed in line with NPPF policy in terms of impacts on the vitality and viability of town centres, the potential to prejudice emerging town centre developments, and the 'town centre first' sequential approach to site selection. Equally, the converse also applies and a lack of identified capacity should not specifically rule out retail developments, where other material factors support such development.

5.48 Detailed quantitative retail capacity tables are enclosed at **Appendix C**.

5.49 Retail capacity modelling follows a consistent, robust methodology which incorporates a number of datasets and informed assumptions which we describe further below, but broadly speaking:

Available Expenditure (£m) - Turnover of existing & proposed (£m) = Surplus or Deficit (£m)

5.50 Experian MMG3 census software is used to provide localised expenditure per capita per annum for various forms of retail spending. These figures are then projected forwards based on population growth, changes in expenditure over time and Special Forms of Trading (SFT) such as internet shopping.

5.51 The turnover of existing retailers across the Study Area is calculated based on average sales densities, or turnover, per square metre. Various retail planning sources provide average (or benchmark) sales densities for all national multiple retailers.

5.52 The surplus or deficit equates to the difference between the available retail expenditure across the Study Area and the turnover of existing facilities within the Study Area. If the total turnover is greater than the available expenditure, then the model would identify an oversupply of existing retail floorspace, whilst a surplus of expenditure would suggest capacity for additional retail floorspace.

5.53 Once the surplus or deficit of expenditure is calculated, it is then presented in floorspace figures (using average sales density assumptions) in order to demonstrate the findings within a 'real world' context. Often surplus figures are presented under a number of different scenarios representing various retailers. For example, discount retailers (such as Aldi and Lidl amongst others) continue to operate at a lower sales density than the 'big 4' (Sainsbury's, Tesco, Asda, and Morrisons). Given the same available 'pot of expenditure', a higher sales density would result in a lower floorspace capacity than a lower sales density, which would result in a higher floorspace capacity.

5.54 Turning now to our detailed findings for Uttlesford, as detailed in Figure 10 above, the household survey results show that facilities within the District have a 39.7% convenience goods market share of all spending carried out by residents of this Study Area.

5.55 In keeping with standard retail study methodology, when assessing the capacity for new convenience retail floorspace we adopt a constant market share in line with findings of the latest household survey (i.e. that stores within the District will continue to draw 39.7% of all convenience goods spending from the Study Area). We consider maintaining a constant market share a sensible basis for analysis given the relative lack of planned developments across the Study Area. In coming to this view, we have analysed the level of commitments identified through correspondence with Council officers of both Uttlesford and neighbouring authorities

5.56 Based on a constant market share, we then allow for growth in retail expenditure over the period to 2040, as well as utilising data provided within the latest Experian Retail Planner Briefing Note 18, in order to take account of forecast growth in retail efficiencies (for example, through the adoption of new technologies and more efficient use of available floorspace). Floorspace efficiencies are estimated to have a greater impact on comparison retailers than convenience retailers over the plan period as the rise of food discounting and disruptions to logistics continue to subdue projected efficiencies in turnover of existing convenience retail floorspace.

5.57 We go on to make a number of statistical assumptions through the quantitative capacity exercise in order to account for the following variables. These are contained at Table 5 of **Appendix C** and can be summarised as:

- Utilising a 'goods based' approach, we strip out expenditure for non-food comparison goods such as clothing, household goods, CDs, DVDs and other media that are now commonly sold at major foodstores so that only the convenience goods floorspace is being considered (i.e. on a like-for-like basis with available convenience expenditure). These deductions are made in line with floorspace figures sourced from publicly available databases or, where data is not available, Nexus' professional judgement based on site visits.

- We also make assumptions as to the gross to net convenience goods sales floorspace of each store, again utilising online planning records where available, national rates databases or Nexus' professional judgement.

- Finally, we consider whether foodstores are likely to attract any additional 'inflow' from outside of the Study Area. In this instance, we have included an assumption that town centre foodstores in Saffron Walden will experience a 5% inflow from beyond the Study Area in recognition of the Town Centre's wider draw of custom and tourist trade. All other Uttlesford centres are assumed to draw their convenience goods custom from within the Study Area.

5.58 We then go on to calculate the anticipated turnover of all major convenience goods operators based on the published company sales data, referred to as 'benchmark' turnover. 'Benchmark' turnover is calculated from national average 'sales densities' (turnover per square metre). By comparing the turnover estimates derived from the findings of the household survey (total available expenditure distributed on the basis of each destinations market share) to the benchmark turnovers, we are able to establish where stores are trading above (overtrading) or below (under-trading) company averages.

5.59 Based on the household survey, we identify in Tables 3-5 of **Appendix C** that Uttlesford's convenience retailers within the Study Area turnover an estimated £179.2m of Study Area residents spend at 2021.

5.60 Accounting for inflow in terms of convenience spending (£1.5m), this equates to an initial surplus of £48.9m against benchmark performance (see Table 5, **Appendix C**).

5.61 Figure 16 below sets out the resultant surplus convenience goods expenditure at each assessment date. This increases from £48.9m in 2021, to £56.7m by 2030, and to £62.7m by 2040 (see Table 6a).

Figure 16. Gross Convenience Goods Surplus Expenditure in Uttlesford

Year	Benchmark Turnover (£m)	Survey Turnover (£m)	Inflow (£m)	Surplus Expenditure (£m)
2021	131.8	179.2	1.5	48.9
2025	132.8	183.8	1.5	52.5
2030	132.8	188.0	1.6	56.7
2035	132.8	192.8	1.6	61.6
2040	136.8	197.8	1.7	62.7

Source: Table 6a, Appendix C

5.62 We then go on to consider committed and extant permissions for new convenience retail floorspace. This includes any developments that have not been built, are currently under construction, or have opened or would not have been operating at the time of the household survey. We do not take into account proposed allocations for retail floorspace, but consider development proposals for which a formal planning application has either been submitted or approved. A complete list of the commitments considered in our capacity assessment is provided at Table 6c of the statistical tables presented at **Appendix C**.

5.63 In total, these committed developments equate to a net convenience floorspace of 583 sq m and an estimated turnover of £4.7m.

5.64 Taking account of committed turnover, we identify a negative residual expenditure of £44.2m at 2021, rising to £52.0m by 2030 and £58.0m by 2040. A significant proportion of this residual expenditure is made up over-performance against benchmark in the District in the earlier years of the assessment, though over time, population and expenditure growth become more of a factor.

5.65 Using average sales densities to calculate a minimum floorspace scenario (a large supermarket operator) and a maximum floorspace scenario (a combination of discount foodstores operators), we go on to calculate the net additional convenience goods capacity for Uttlesford District.

Figure 17. Net quantitative 'capacity' for new convenience goods facilities in Uttlesford

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Minimum Floorspace Capacity (sq m net)	Maximum Floorspace Capacity (sq m net)
2021	48.9	4.7	44.2	3,900	5,700
2025	52.5	4.7	47.8	4,200	6,100
2030	56.7	4.7	52.0	4,500	6,600
2035	61.6	4.7	56.9	4,900	7,200
2040	62.7	4.7	58.0	5,000	7,300

Source: Table 6d, Appendix C

5.66 This quantitative capacity is calculated to grow from a positive capacity of between 3,900 and 5,700 sq m in 2021, to between 4,500 and 6,600 sq m by 2030. In purely quantitative terms, this capacity is sufficient to support the provision of extensive new convenience retail floorspace over the plan period.

5.67 However, as we have previously identified, there is evidence of reducing market shares in the District's Town Centres, and so there are important qualitative considerations before allocating and/or permitting new foodstore floorspace. We examine the opportunities for growth in more detail in Section 6.

Comparison Goods Findings

Market Shares

5.68 Turning to consider comparison goods, we examine market shares across the range of categories defined by Experian. These eight categories cover all ranges of bulky and non-bulky items. The full results of our market shares analysis are set out in Tables 9-26 of **Appendix C**.

5.69 To begin with, we look at the overall comparison goods spend by residents across the Study Area. The results show that destinations in Uttlesford District account for 13.3% (£85.8m) of the spending of all Study Area residents in 2021 (£647.6m per annum). The remaining 86.7% (£561.8m) of spending carried out by residents of the Study Area is spent at destinations beyond Uttlesford District.

5.70 Figure 18 specifically examines where residents of the Study Area are carrying out their comparison goods spending. The results show that, in contrast to the convenience goods findings, town centre locations are the most popular destination in Uttlesford (accounting for 10.5% of the 13.3% market share). Within that grouping, Saffron Walden (8.9% market share) is, by some margin, the most popular comparison goods destination within Uttlesford District. Out-of-centre facilities in Saffron Walden account for a 2.0% market share, with Great Dunmow Town Centre the third most popular destination (1.2%).

5.71 Outside the District, a number of higher-order centres attract large proportions of comparison goods spend. Cambridge leads the way (26.4%), followed by Chelmsford (17.5%) and Braintree (9.1%).

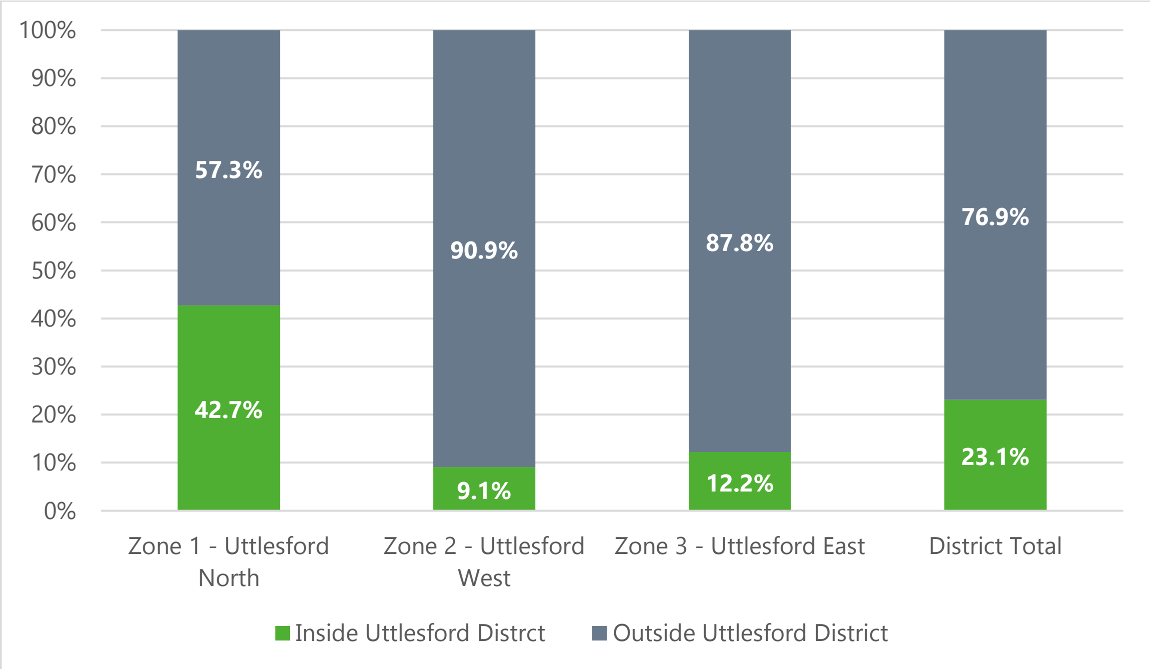
Figure 18. Comparison Goods Market Share from the Study Area, by Destination

Destination	Total Market Share Comparison (%)	Total Market Share Comparison (£m at 2021)
Saffron Walden Town Centre	8.9%	£57.6m
Stansted Mountfitchet Local Centre	0.3%	£1.7m
Great Dunmow Town Centre	1.2%	£7.7m
Thaxted Local Centre	0.1%	£0.6m
Other Local Centres/Villages	0.1%	£0.7m
In-centre Sub-total	10.5%	£68.3m
Saffron Walden out-of-centre	2.0%	£13.2m
Stansted Mountfitchet Out-of-centre	0.1%	£0.7m
Great Dunmow out-of-centre	0.6%	£3.6m
Uttlesford District Total	**13.3%**	**£85.8m**
Haverhill	9.4%	£60.9m
Elsewhere in the Study Area	0.5%	£3.6m
Chelmsford	17.5%	£113.1m
Royston	2.4%	£15.3m
Harlow	5.6%	£36.1m
Cambridge	26.4%	£170.7m
Bishops Stortford	6.3%	£40.9m
Braintree	9.1%	£58.9m
Bury St Edmunds	2.4%	£15.8m
Others outside the Study Area	7.2%	£46.5m
Total	**100.0%**	**£647.6m**

Source: Tables 25 & 26, Appendix C

5.72 As with our previous assessment of convenience goods, we are also able to examine the degree of comparison goods spend within each Zone. Figure 19 examines the amount of comparison goods spending carried out inside Uttlesford District by residents of the District itself.

Figure 19. Comparison Goods Market Share by Destination (Uttlesford Residents)



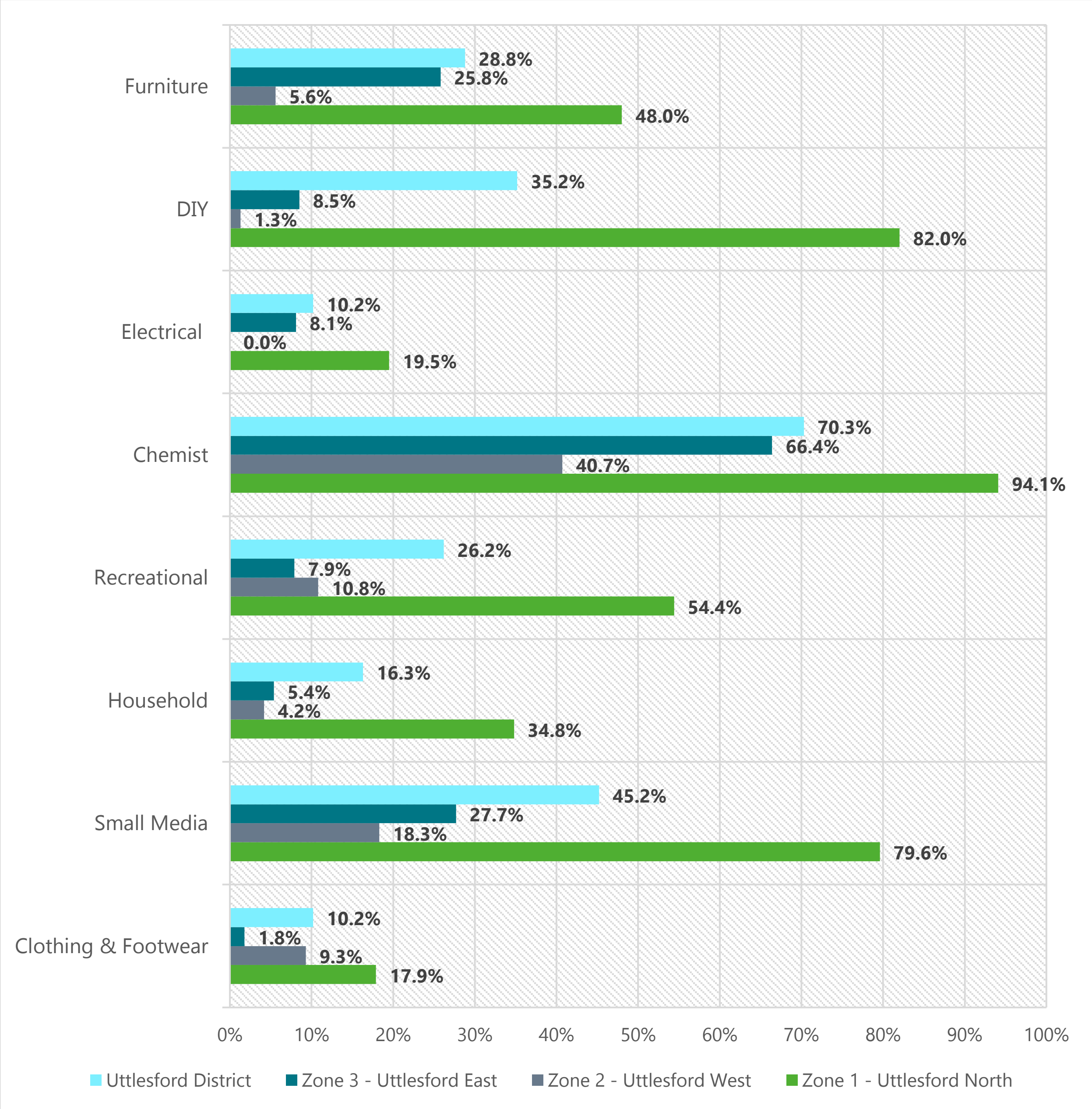
Source: Tables 25 & 26, Appendix C

5.73 The survey findings for comparison goods show that, whilst the majority of trade across all Zones is leaked outside of the District, residents of Zone 1 have a noticeably higher proportion of spending within Uttlesford District, than either of the other two Zones which comprise the District. This is reflective of proximity to Saffron Walden, which offers the District's only substantial comparison goods offer.

5.74 Overall, residents of the District carry out 23.1% of their comparison goods spending within the District itself, with 76.9% of spending carried out elsewhere. In terms of the latter, the survey evidence shows that residents in Zone 1 lean heavily towards Cambridge (39.1% of all spending), whilst residents in Zone 2 visit a mixture of locations including Bishops Stortford (31.3%) and Harlow (27.6%). Residents in Zone 3 gravitate towards Chelmsford, which accounts for 41.8% of all its residents' spending.

5.75 In Figure 20, we also analyse the market share of different types of comparison goods, considering which items are purchased from stores and centres inside Uttlesford District, and what the propensity is to travel further afield for certain items.

Figure 20. Comparison Goods Market Share by Goods Category (Uttlesford residents)



Source: Tables 25 & 26, Appendix C

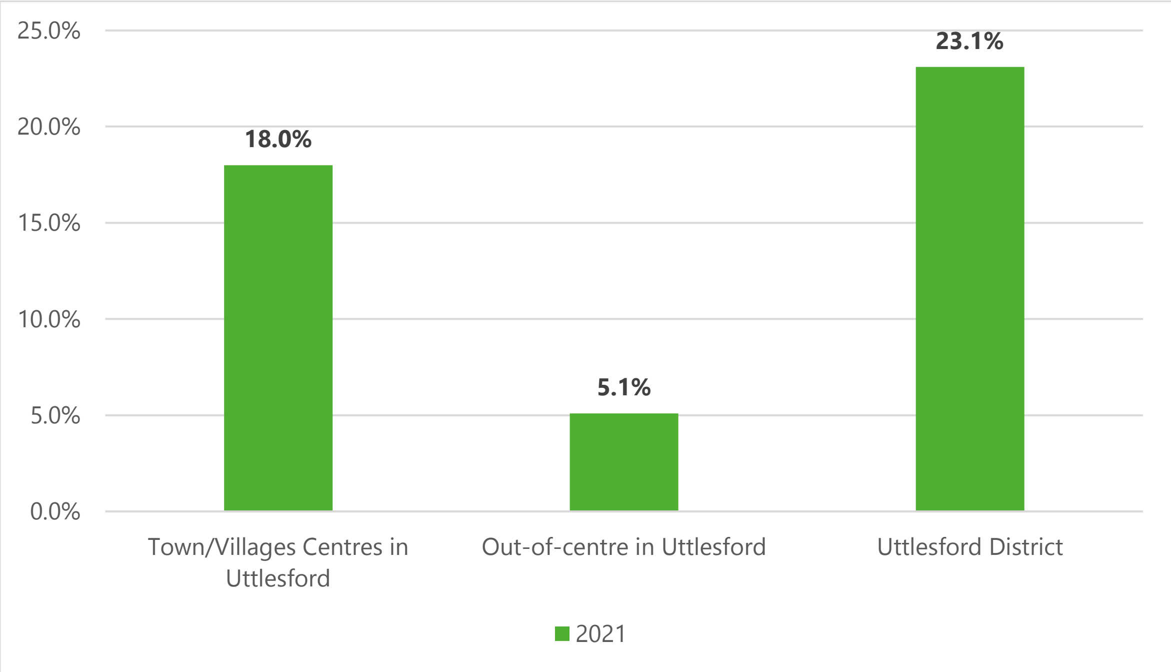
5.76 The survey results show that there is a considerable variance between spending on different goods categories, as well as between different Zones. Looking firstly at the figures for the whole of the District, the amount of spend retained within the District varies from 70.3% of spending on chemist goods, to just 10.2% of spending on both clothing and footwear, as well as electrical goods.

5.77 Turning then to consider the differences between Zones, it is evident that residents of Zone 1 (Uttlesford North) have a much higher propensity to shop for comparison goods within the District than residents of either Zones 2 or 3. This is due to the fact that Saffron Walden has the District's only substantial comparison goods offer.

Local Market Share Trends – Comparison Goods

5.78 In Figure 21 below, we examine the comparison goods spending of Uttlesford residents (Zones 1-3) within the District itself. Unfortunately, the 2018 Retail Study was not presented in such a way that makes it possible for us to compare and contrast the market share data between the two dates on a District-only basis (as we earlier did for convenience goods).

Figure 21. Comparison Goods Market Share from Uttlesford Residents (2021)

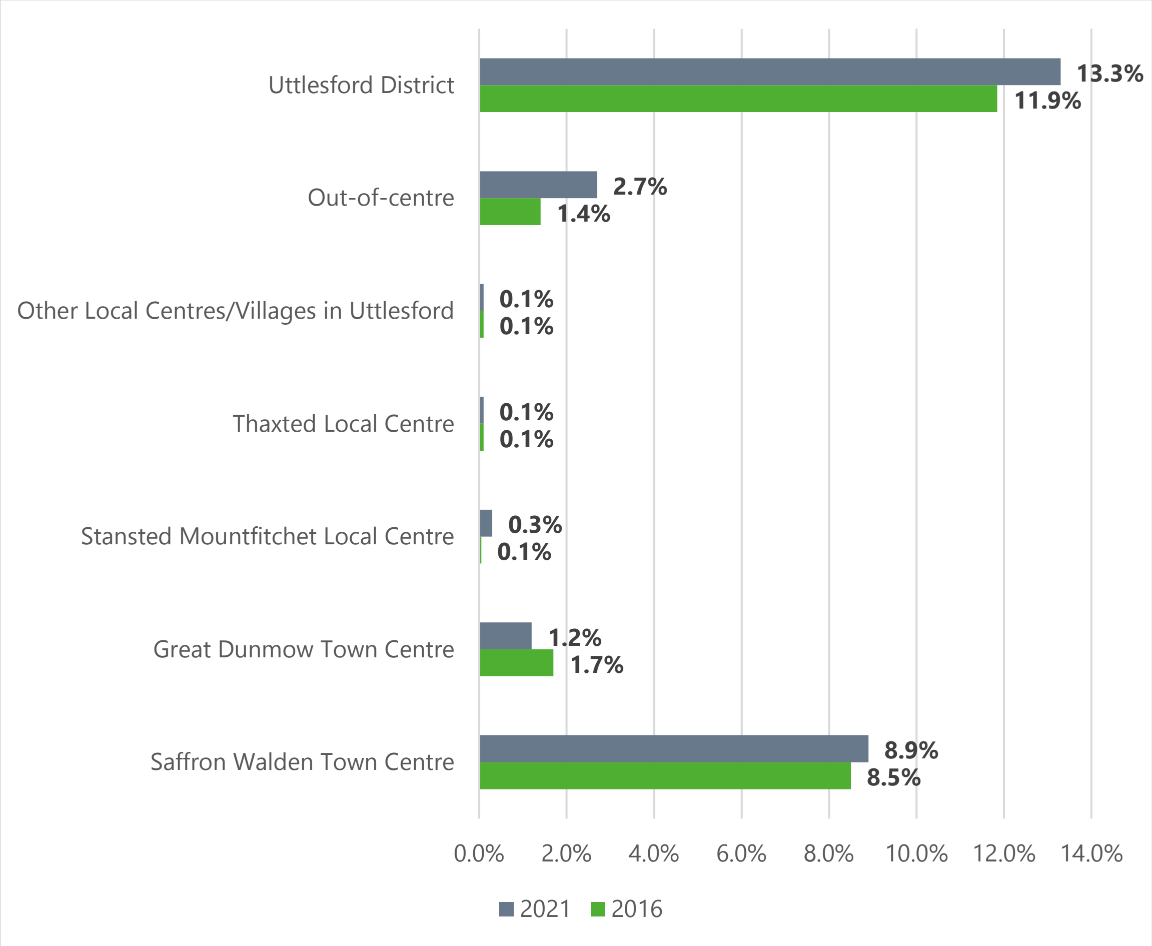


Source: Appendix C, Table 26

5.79 We are though able to compare and contrast the District's market share within the wider Study Area. In Figure 22 below, the results show that the District has increased its market share of comparison goods spend from 11.9% in 2016 to 13.3% in 2021. Both in-centre and out-of-centre facilities in Saffron Walden have experienced an increase in market share, as has Stansted Mountfitchet Town Centre. There has though been a reduction in comparison goods market share in Great Dunmow

Town Centre.

Figure 22. Comparison Goods Market Share by Destination (2016-2021)



Source: Appendix C & Uttlesford Retail Study 2018

5.80 In light of the above, our comparison goods market share analysis shows that the District has, overall, fared reasonably well over the period 2016-2021. The likelihood is that the District has retained its market share, despite sizable regional competitors, because of minimal internal competition from out-of-centre destinations within Uttlesford District. However, the findings clearly show that only Saffron Walden provides any significant comparison goods offer in its own right, and highlights the importance of convenience and service uses to support the District's other centres.

Comparison Goods Capacity

5.81 The methodology for calculating capacity for comparison goods floorspace differs from that used to model capacity for convenience goods floorspace. The principal reason for this is that there are no robust, industry standard benchmark sales densities for calculating the turnover of smaller independent retailers that typically make up the majority of the comparison provision of town centres (although it is noted that sales densities are published for national multiple comparison retailers). Moreover, the trading levels of comparison retailers can fluctuate significantly depending on a number of localised variables, most notably the location of the retailer relative to similar providers (as customers are more likely to link multiple comparison goods trips to retailers in close proximity to each other).

5.82 As such, we adopt a standard approach that comparison goods retailers across the Study Area are trading 'at equilibrium' at 2021, meaning that we adopt the survey derived turnover of each facility, and examine capacity by measuring the growth in available expenditure to 2040. For the purposes of our assessment, we have assumed that the District's attraction to Study Area residents will remain constant at 13.3% of all spending proportionate to population growth (Table 27a). Based on the limited scale of planned developments inside and nearby the District, we consider this a robust basis for analysis.

5.83 Figure 23 sets out the resultant gross comparison goods capacity forecasts over time. The early years forecast shows negative capacity. This is because Experian forecasts show that the near-term sales efficiency of existing retailers will actually grow faster than the forecast growth in spending, meaning that the limited expenditure generated by the growth in local population will be consumed by existing retailers, rather than being made available to support new floorspace. Only by 2035 does a positive surplus expenditure arise.

Figure 23. Gross Comparison Goods Surplus Expenditure in Uttlesford

Year	Benchmark Turnover (£m)	Survey Turnover (£m)	Inflow (£m)	Surplus Expenditure (£m)
2025	101.4	97.2	3.4	-0.9
2030	116.2	112.0	3.8	-0.3
2035	132.1	130.5	4.4	2.8
2040	150.5	152.9	5.0	7.4

Source: Table 27a, Appendix C

5.84 We then consider committed and extant planning permissions for new comparison retail floorspace across the Study Area that are likely to come forward over the plan period, again informed by our discussions with Council officers. This includes any developments that are currently under construction, or would not have been operating at the time of the household survey. In the same way as we viewed convenience goods, we do not take into account proposed allocations for retail floorspace that are not likely to come forward over the plan period.

5.85 In total, these committed developments are minor and equate to a net 260 sq m of comparison goods floorspace and an estimated turnover of £1.6m (see Table 26c at Appendix C). The commitments are then projected forwards and deducted from the surplus expenditure. Once accounted for, we are able to calculate the net comparison goods capacity.

Figure 24. Net quantitative 'capacity' for new comparison goods facilities in Uttlesford

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Minimum Floorspace Capacity (sq m net)	Maximum Floorspace Capacity (sq m net)
2025	-0.9	1.6	-2.4	-300	-500
2030	-0.3	1.8	-2.1	-300	-400
2035	2.8	2.0	0.8	100	100
2040	7.4	2.3	5.1	500	800

Source: Table 26d, Appendix C

5.86 Taking account of committed turnover, we identify an initial negative residual expenditure of -£2.4m at 2025, rising to -£2.1m at 2030, and £5.1m by 2040. Even at 2040 though, this equates to a very small floorspace equivalent of between 500-800 sq m net.

Food and Beverage Capacity

5.87 We have undertaken an assessment of the potential capacity for additional food and beverage floorspace across the District, utilising current market shares as identified through the household survey, population and spending growth rates and benchmarking against current levels of provision.

5.88 This exercise identifies the future spending available to support additional food and beverage floorspace (in the form of restaurants, pubs, bars, café etc.) over the plan period to 2040. This approach is not prescriptive, but instead provides an indication of the scope for future development to be supported, in addition to the findings of the assessments of the key centres.

5.89 Experian provides localised data on spending on restaurants and cafés per capita, which includes spending on alcoholic drinks (away from home) and take-away meals. This spending was shown to be £1,390 per annum for residents in the Study Area (2019 prices).

5.90 Taking into account the population growth, and anticipated leisure spending growth rates (Experian Retail Planner 18, Figure 1a[12]), we calculate in Figure 25 a total spend across the District (defined as Zones 1-3) of £129.2m at 2021, increasing to £153.1m by 2030, and to £179.3m by 2040.

5.91 This spending is then attributed to the restaurant, café and bar facilities across the District. Our experience of surveying similarly rural Districts elsewhere across the UK is that around 50% of all restaurant, pub, bar and café expenditure is retained within the District. We have applied this assumption.

5.92 Growing the 'benchmark' turnover of facilities from current levels on the basis of 1% per annum[13] to account for growth through extensions and trading efficiencies over the plan period, we find the anticipated spending surplus (or deficit) as follows.

Figure 25. Restaurants, Pubs, Bars and Café Spending

Year	District Population	Spend Per Capita	Total Spend (£m)	Retention Rate @ 50%	Growth in Spending (£m)	Benchmark Growth (£m)	Residual Spending (£m)
2021	92,948	£1,390	£129.2m	£64.6m	-	-	-
2025	96,860	£1,446	£140.0m	£70.0m	£5.4m	£2.6m	£2.8m
2030	101.041	£1,515	£153.1m	£76.6m	£12.0m	£5.8m	£6.2m
2035	104,426	£1,585	£165.5m	£82.8m	£18.2m	£9.0m	£9.2m
2040	107,556	£1,667	£179.3m	£89.7m	£25.1m	£12.3m	£12.8m

Source: Nexus analysis

[12] Note that this accounts for a substantial short-term decline in leisure spending as a result of the Covid pandemic
[13] We are not aware of any published data for restaurant, pub, bar and café sales efficiency growth and so have assumed a figure of 1%.

Figure 26. Restaurants, Pubs, Bars and Café Capacity

Year	Residual Spending	Sales Density	Floorspace (sq m)
2025	£2.8m	£5,200	540
2030	£6.2m	£5,450	1,140
2035	£9.2m	£5,700	1,610
2040	£12.8m	£5,950	2,150

Source: Nexus analysis

5.93 We find a total food and beverage spending surplus across Uttlesford District of £6.2m by 2030, and £12.8m by 2040.

5.94 Adopting an average sales density of £5,000 per sq m at 2021 (again, projected to grow in line with a 1% sales efficiency) we calculate the typical restaurant, pub and café floorspace that could be supported by the identified surplus expenditure. This is shown as being up to 1,140 sq m by 2030, and 2,150 sq m by 2040. This should be treated only as a rough guide.

5.95 We are also highly cognisant of the fact that the recent pandemic will have resulted in the closure of a large amount of restaurant, bar and café floorspace across the District. Whilst our figures show that there is likely to be a substantial pent-up consumer demand for additional spending in this area, this does not mean that all of that demand should be met through new floorspace. The potential re-occupation of vacant floorspace should be accounted for in the first instance.

6 Town Centre Health Check Assessments

6.1 This section of the report sets out our health check assessment to assess the vitality and viability of Uttlesford's Centres including: Saffron Walden and Great Dunmow Town Centres and the Local Centres of Thaxted and Stanstead Mountfitchet.

6.2 The extent of our assessments of the centres have been determined by the extent of Experian Goad Plans (where available), in order to provide consistency and allow for comparison against national averages and the findings of the previous 2016 Study. Where Goad Plans are not available, the Council's base mapping has been used. Full sized composition plans are contained at **Appendix D**.

Methodology

6.3 This town centre assessment builds on the consultant teams' analysis of market trends as outlined in Chapter 2. We supplement this analysis with two sources of new empirical evidence; consultation and stakeholder engagement, and our town centre health checks. By combining the findings of our engagement with local groups, residents and businesses, and our on-the-ground observations, we are able to build a picture of the current health of the centres, based on performance against the range of health check indicators set out in the NPPF / PPG.

6.4 We describe our methodology for the health check exercise below, before going on to examine each of the Town and Local Centres in Uttlesford. We utilise the categorisations employed by Experian. These are mostly commonplace, but for the avoidance of doubt, 'Retail Services' include the likes of dry cleaners, health & beauty, opticians and travel agents, whilst 'Leisure Services' include bars, cafes, fast-food, nightclubs and cinemas.

6.5 Nexus carried out the town centre health check survey exercises in June and August 2021, which were completed after the resumption of trading for retail stores following the Covid-19 'lockdown' and the resumption of in-store trading from April 2021, and trading for the hospitality industry in May 2021.

6.6 Health checks are both a physical exercise in walking the town centres to understand their make-up, constraints, and opportunities, as well as an exercise in understanding the views of local stakeholders.

6.7 While the NPPF does not provide a precise list of criterions to be used to assess the health of a centre, the Government's 'Town Centres and Retail' National Planning Practice Guidance (NPPG) of March 2014, updated in July 2019, offers a helpful set of indicators. The NPPG explains these indicators should be monitored on a regular basis in order to judge the health of a centre and its performance over time:

- **Diversity of Uses** | Data on the diversity of uses in Uttlesford's centres was collated during the health check completed by Nexus in August 2021. The collected data includes the number, type and quantum of floorspace provided in these locations.
- **Proportion of Vacant Street Level Property** | Vacant properties were also identified during the 2021 health check. The volume of vacant floorspace within a centre can provide an indication of how well the centre is performing. However, it is important to acknowledge that a degree of vacancy is inevitable and indeed desirable. Some churn is expected in the market as units alter and change, as new businesses come in, and others leave. In this context, vacant units can be found in even the strongest of town centres. Equally, a low vacancy rate does not necessarily mean a centre is performing well; as the quality and performance of the occupied units may be relatively poor.
- **Commercial Yields on Non-Domestic Property** | Whilst this can be an indicator of town centre performance over time, data on commercial yields for Uttlesford's centres is not publically available at this time, as it is now only produced by ONS for major cities. Commercial rents provide a suitable alternative indication of the relative attractiveness of the area.
- **Customers' Views and Behaviour** | Information on customers' views is based on the results of the household survey data. Importantly, and as described at Chapter 4, the household survey undertaken by NEMS represents a demographically accurate sample of the population.
- **Retailer Representation and Intentions to Change Representation** | Information on the current strength of centres and retailer representation have been derived from Experian Goad Category Reports and other published sources.
- **Commercial Rents** | An examination of average prime rents to facilitate an understanding of shopping rents and investment yields.
- **Pedestrian Flows** | General footfall and pedestrian flows were observed by Nexus during site visits to the Centres. Nexus was able to obtain a comprehensive understanding of pedestrian flows through observation at varying times.
- **Accessibility** | Consideration of access to and around each centre was informed by the Nexus site visits. This was in addition to stakeholder engagement, and a desktop review of data pertaining to access to public transport and parking facilities. The accessibility of a centre is determined by the ease

and convenience of access by a variety of transport means including pedestrians, cyclists and disabled people.

- **Perceptions of Safety and Occurrence of Crime** | General perceptions of safety were gathered by Nexus during the site visits and supplemented by a review of existing data.
- **State of Town Centre Environmental Quality** | Consideration of the quality of the buildings and public realm in each of the centres was informed by Nexus' site visits to the centres.
- **Balance between independent and multiple stores** | Consideration of the balance of retailer representation was informed by Nexus' site visits to the centres, as well as Goad mapping.
- **Barriers to Entry** | Consideration of the extent to which there is evidence of barriers to new businesses opening and existing businesses expanding. Attention was given to the length of unit vacancies as per Goad Reports, as well as the size of units available to let, and insights provided through engagement with relevant stakeholders operating businesses within the centres.
- **Opening Hours / Availability / Evening Economy** | General understanding of the night time economy was informed by Nexus' site visits to the centres, stakeholder engagement, and a desktop review of various local businesses' opening hours.

Saffron Walden Town Centre

Description

6.8 Saffron Walden is the primary retail and leisure destination in the District, providing a range of services and amenities that are not widely available within the smaller settlements. The centre is located 12 miles north of Bishops Stortford.

6.9 Due the historic nature of this centre, the layout is informal and interesting, with several narrow side streets which add to its character. The main shopping streets are located on High Street, King Street, Hill Street and around Market Place, which acts as a focal point of the centre. The centre is entirely within a Conservation Area. Saffron Walden is classed as a 'Town Centre' within the Uttlesford Local Plan (2005).

The Corner Cupboard, King Street

View across Market Square

Public Realm, Hill Street

View along Market Row

Overall Composition

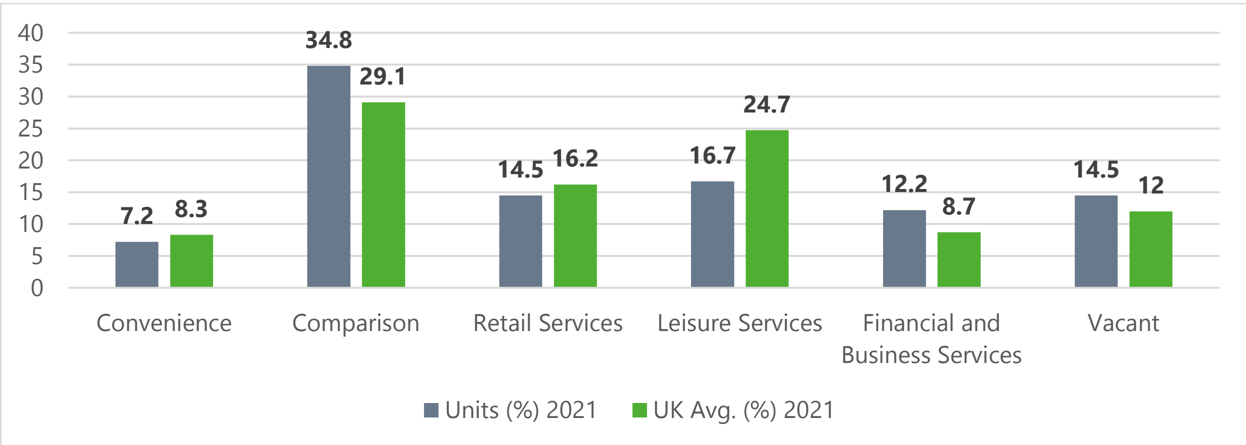
6.10 Saffron Walden is the largest centre in the District comprising of 221 units. The centre has a good mix of uses largely comprising independent retailers with a number of national multiples including Boots, Superdrug, Monsoon and Phase Eight, primarily located in King Street. Waitrose is the largest convenience store located to the south of the centre. Figure 27 provides an overview of Saffron Walden's composition at the time of the site visits in August 2021, compared to the UK averages (2021). It also contrasts the findings to the last health checks carried out for the Council in 2010.

Figure 27. Saffron Walden Town Centre Composition

Categories					UK Average Jun-21	UK Average Jun-21
	Units 2010 (%)	Units 2021 (#)	Units 2021 (%)	Floorspace 2021 (%)	Units (%)	Floorspace (%)
Convenience	7.2	16	7.2	10.8	8.3	15.3
Comparison	54.1	77	34.8	37.3	29.1	33.4
Retail Services		32	14.9	8.6	16.2	8.6
Leisure Services		37	16.7	19.9	24.7	25.7
Financial & Business Services		27	12.2	12.9	8.7	7.3
Services	32.0	-	-	-	-	-
Vacant	6.7	32	14.5	10.7	12.0	10.7
Total	**100**	**221**	**100**	**100**	**100**	**100**

Source: Nexus Planning 2021, Goad Experian 2021
Note: Data analysed for 2021 uses the current Goad category definitions to allow comparison with UK averages
Note: Data analysed for 2010 using superseded Goad category definitions to allow comparison with historic data.

Figure 28. Saffron Walden Town Centre - composition comparison chart (%)



6.11 Figure 29 maps the range of uses in the Town Centre. A larger version is contained at **Appendix D**.

Figure 29. Saffron Walden Composition Map

Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

Convenience

6.12 The proportion of convenience goods units (7.2%) has remained consistent since 2010, and is marginally below the UK average of 8.3%. The centre also has a lower proportion of convenience floorspace (10.8%) compared to the UK average of 15.3%.

6.13 Qualitatively, the centre has a wide range of convenience units including butchers, bakers, and health food shops. The majority of these units are independent stores. The centre also features a Waitrose store (2,501 sq m net) to the south of the town centre. The town has two out-of-centre foodstores; a Tesco on Radwinter Road (3,196 sq m net) to the south east of the town, and an Aldi store (1,218 sq m net) on Thaxted Road to the south of the town.

Comparison

6.14 Comparison units account for the largest proportion of stores within Saffron Walden Town Centre, with 77 units (34.8%), which exceeds the UK average of 29.1%. This suggests that the centre is still performing well in terms of comparison goods offer, and this is borne out by the survey results highlighted in Section 4. Notwithstanding, in keeping with many town centres across the UK, Saffron Walden has seen a significant decrease in the number of comparison goods retailers since 2010, when they accounted for 54.1% of units in the centre.

6.15 The centre comprises largely independent stores with some national comparison retailers located primarily on King Street., including Boots, Superdrug, New Look, Phase Eight and Clintons.

6.16 The centre features a wide selection of different comparison units, including fashion, jewellers and homeware and charity shops, which would all be expected in the largest town centre in the District.

Services

6.17 The service sector (retail, leisure, financial and business services) has increased in presence since the 2010 health checks. Overall, services now account for 43.8% of units within the centre, compared to 32.0% in 2010.

6.18 Retail services account for 14.9% of the units in Saffron Walden, slightly below the UK average of 16.2%. Of the retail services provided in Saffron Walden Town Centre, it is notable that nearly two-thirds provide 'health and beauty' services.

6.19 The centre features a lower proportion of leisure units (16.7%) compared to the UK average of 24.7%. The leisure services currently present in the centre include a range of cafes, along with several public houses, two hotels, restaurants and takeaway units. Notably, Saffron Walden does not currently offer any increasingly popular 'experience-based' leisure activities such as indoor golf or escape rooms.

6.20 Financial and business services account for 12.2% of the centre's units and 12.9% of the floorspace. These figures are above the UK averages of 8.7% and 7.3% respectively. The centre's offer includes a wide range of banking options, as well as a number of estate agents.

Vacancies

6.21 At the time of the site visits in August 2021, there were 32 vacant units (14.5%), a higher proportion than the UK average (12.0%). However, it should be noted that there was evidence of several units being under alteration.

6.22 This figure has risen significantly since the health check undertaken in 2010 when 6.7% of units were observed to be vacant. The vacancies are spread throughout the centre, suggesting that there are no particular areas of concern.

Pedestrian Flows

6.23 During the site visits high pedestrian flows were observed throughout the centre, with no particularly quiet areas observed. The historic street pattern and highly walkable nature of the centre contributes to this. King Street and Hill Street were noted as having the greatest pedestrian flows.

Accessibility

6.24 There are a number of car parks available in Saffron Walden, all of which are located on the outskirts of the centre. These include:

- Fairycroft Road (incl. Waitrose) – 294 spaces
- The Common – 109 spaces
- Rose and Crown– 36 spaces
- Swan Meadow – 394 spaces

6.25 All car parks are charged at £1.20 for a maximum of 3 hours. Further parking was also witnessed on Market Place at the time of the Nexus site visit. Car parks appeared to be well utilised.

6.26 High levels of traffic were noted along High Street, particularly at the Junction with King Street, although no congestion was noted at the time of the Nexus visit.

6.27 There is no train station in Saffron Walden. The closest station is 2 miles away at Audley End with a number of bus services connecting it to the centre.

6.28 A number of bus services link Saffron Walden to locations elsewhere in the sub-region, including Cambridge, Haverhill and Stansted Airport, as well as many other local towns.

6.29 Parts of the centre are pedestrianised. However, narrow pavements make navigating the centre by foot difficult in some places. Measures were noted on Hill Street to widen the pedestrian area using cones.

6.30 The results of the household survey found that 82.5% of respondents travelled to the town centre using private vehicles, whilst 13.9% had walked to the centre. 1.5% of respondents used the bus.

Perception of Safety

6.31 The centre was relatively busy at the time of the site visits, providing significant natural surveillance across the centre. The perception of crime in Saffron Walden is low. This is corroborated by data from crimerate.co.uk which notes that the incidence of crime in Saffron Walden was 63% lower than the Essex average in 2020.

Opening Hours

6.32 Saffron Walden benefits from a number of public houses and restaurants throughout the centre which ensures that an evening economy is in operation within this centre. With the exception of some convenience units, such as Waitrose, the remainder of the centre operates traditional opening hours.

Environmental Quality

6.33 Saffron Walden is a pleasant centre which appears to be well maintained and no litter evident at the time of the visits. A number of planters with attractive floral displays were witnessed throughout the centre along with heritage signage.

6.34 Attractive shopfronts and buildings were noted throughout the visit, in particular the Cross Keys Hotel, the Library in Market Place and the Corner Cupboard. Shop frontages throughout the centre were of good quality. However, a more consistent approach to shop frontages would be beneficial throughout the centre.

6.35 The street furniture was largely uncluttered and the pavements in relatively good condition, albeit very narrow in places as would be expected in a centre of its historic nature. Measures were noted on Hill Street to widen the pedestrian area using cones, though a more permanent solution should be sought to widen these areas.

Barriers to Entry

6.36 The majority of the centre is designated as a Conservation Area (designated 1968) and includes a number of listed buildings. Whilst this is undoubtedly a positive in terms of visitor attraction, it could also potentially act as a barrier to entry for new businesses as any alterations will have to demonstrate the preservation of the Conservation Area.

6.37 There are a number of vacant units in the Town Centre (32 no.). These are not concentrated in any particular area, which is a positive. However, it is notable that a number of vacant units were previously occupied by national multiple retailers. This could be considered a barrier to entry to other national multiples who may be concerned with the viability of the centre.

Customer Views & Behaviour

6.38 When asked what they most liked about Saffron Walden Town Centre, the most common responses from the NEMS household survey (Q29) were 'choice and range of shops' (35.0%), the 'environmental quality of the centre' (19.9%) and 'the market' (6.1%).

6.39 The top three responses as to what would encourage respondents to visit the centre more often (Q30) were, 'improved choice and range of shops' (15.2%), 'more parking' (11.7%) and 'cheaper parking' (9.0%).

Summary

6.40 In summary, our health-check of Saffron Walden Town Centre indicates that:

- The provision of convenience goods units is slightly below the UK average, whilst the provision of comparison goods units is well above the UK average.
- The centre is increasingly accented towards independent retail.
- There has been a notable increase in service provision in the town centre. Services account for 43.8% of units within the centre, compared to 32.0% in 2010. Financial services and health and beauty services are especially prominent.
- The centre has a higher number of vacant units (14.5%) compared to the UK average (12.0%). There are though no areas of concentrated vacancies, and there was evidence of a number of units being refurbished at the time of our surveys.

- In terms of improvements, improved visitor signposting to the car parks would be beneficial, and whilst measures were noted on Hill Street to widen the pedestrian area using cones, a more permanent solution should be sought. A shopfront strategy could be implemented to assist in bringing all shopfronts up to the high standards set in general.

Great Dunmow Town Centre

Description

6.41 Great Dunmow is an historic market town located equidistant between Braintree and Bishops Stortford. The retail provision in the centre is primarily located along High Street and Stortford Road.

6.42 Great Dunmow is classed as a 'Town Centre' within the Uttlesford Local Plan (Adopted 2005).

The Old Town Hall, Market Place

Attractive shopfronts, High Street

View north from War Memorial on High Street

View along High Street

Overall Composition

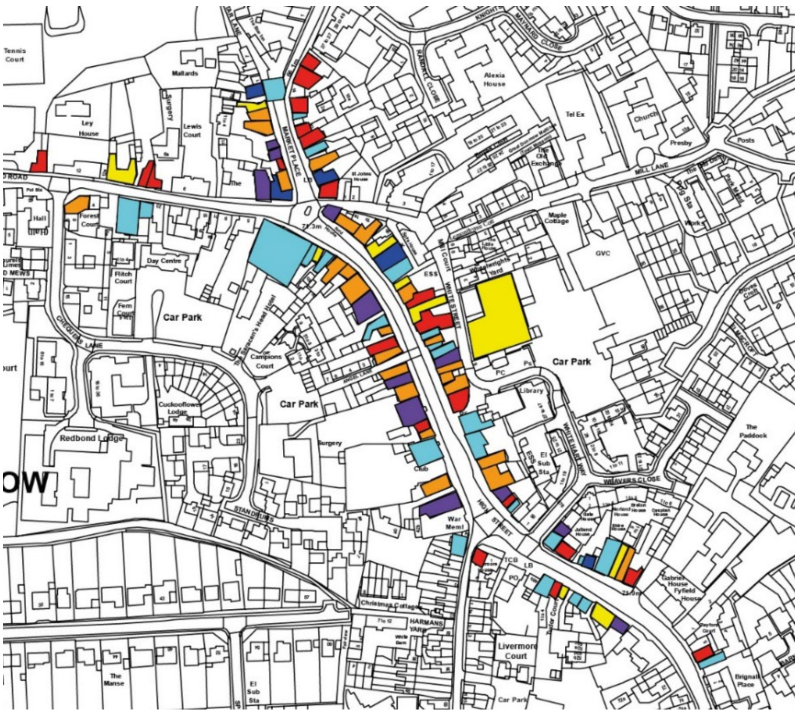
6.43 Figure 30 provides an overview of Great Dunmow's composition at the time of the site visits in August 2021, compared to the UK averages (2021), as well as a comparison to previous centre surveys carried out in 2010.

Figure 30. Great Dunmow Town Centre Composition

Categories					UK Average Jun-21
	Units 2010 (#)	Units 2010 (%)	Units 2021 (#)	Units 2021 (%)	Units 2021 (%)
Convenience	9	9.4	8	8.3	8.3
Comparison	34	35.4	24	25.0	29.1
Retail Services	-	-	23	24.0	16.2
Leisure Services	-	-	23	24.0	24.7
Fin. / Bus. Services	-	-	13	13.5	8.7
Services	49	51.0	-	-	-
Vacant	4	4.2	5	5.2	12.0
Total	**96**	**100**	**96**	**100**	**100**

Source: Nexus Planning 2021
Note: Data analysed for 2021 uses the current Goad category definitions to allow comparison with UK averages
Note: Data analysed for 2010 using superseded Goad category definitions to allow comparison with historic data.

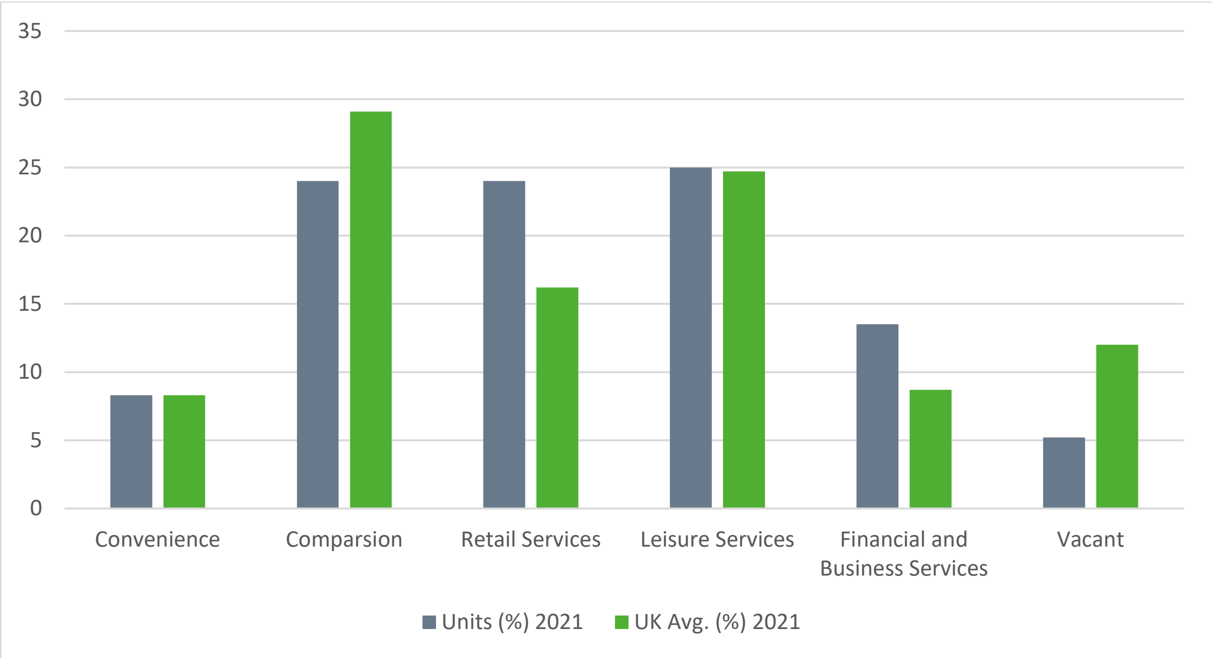
Figure 31. Great Dunmow Composition Map



Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

6.44 Great Dunmow comprises 96 units, and is the second largest centre in the District. The centre predominately comprises independent retailers with a limited number of national multiples including Boots, as well as William Hill and Coral in terms of betting shops, and Barclays and Nationwide for financial services. Services account for almost two-thirds of the units in the centre.

Figure 32. Great Dunmow - Centre Composition Comparison Chart



Convenience

6.45 The provision of convenience goods units in Great Dunmow is in line with the UK average of 8.3%. The main offer is a Co-Operative foodstore, located behind the high street (725 sq m net). The convenience offer also includes a One Stop along with other smaller, independent convenience units including 2 butchers and 2 delicatessens.

Comparison

6.46 The centre has seen a significant decrease in the number of comparison units since 2010, at which point, there were 34 units (35.4%). In 2021 comparison units accounted for 24 units (25.0%), which is now lower than the UK average of 29.1%.

6.47 The majority of the comparison units are independent retailers offering a range of goods. The comparison offer comprises a mix of charity shops, sports goods, chemists, carpet and flooring shop, as well as antiques and gift shops. However, the centre lacks in fashion and footwear stores.

Services

6.48 Services account for 62.5% of units within Great Dunmow, which significantly exceeds the UK average of 49.6%. The services provision for the centre has increased since the previous health-check, when they accounted for 51.0% of units in the centre.

6.49 Retail services make up 24% (23) of the units, higher than the UK average of 16.2%. A majority of the retail services are made up of the 'health and beauty sector', which account for 60.8% of the retail services.

6.50 Leisure services account for 24.0% of the centre, which is comparable with the UK average of 24.7%. The leisure services within the centre comprise cafes, fast food and takeaways, as well as restaurants, public houses and hotels.

6.51 The centre has a higher percentage of financial and business services (13.5%) compared to the UK average of 8.7%. The financial and business services include a number of estate agents, as well as financial advisors and banks.

Vacancies

6.52 The number of vacant units within the centre has increased marginally since 2010. However, the vacancy rate in the centre remains low at only 5.3%. This is significantly lower than the UK average of 12.0% and is positive in terms of the vitality and viability of this centre. The few vacancies there are, are spread throughout the centre, and as a result, there are no particular areas of concern in Great Dunmow.

Pedestrian Flows

6.53 The highest areas of pedestrian flow were witnessed along High Street, primarily between New Street and Market Place.

Accessibility

6.54 Great Dunmow Town Centre does not benefit from a dedicated train station; the nearest station being in Stansted Mountfitchet.

6.55 There are a number of car parks in Great Dunmow, all of which charge for parking. On-street parking is limited throughout the centre.

- Angel Lane – 31 spaces (maximum stay 3 hours for £1.20)
- Chequers Lane – 64 Spaces (maximum stay 3 hours for £1.20)
- New Street – 11 Spaces (maximum stay 3 hours for £1.20)
- White Street – 172 spaces (up to £3.50 for 9 hours, with monthly, quarterly, bi-annually or annual rates are also available).

6.56 The centre also benefits from several bus services, connecting local residents to a number of locations including Saffron Walden, Braintree, Chelmsford and Stanstead Airport. In addition to these services, the 315 service offers a more localised service to the immediate surrounding villages.

6.57 Continuous traffic was noted on High Street at the time of the Nexus site visits, although no congestion was witnessed. Car parks appeared to be well utilised, with the availability of more parking stated as something that would encourage more visits to the centre in the household survey (see below).

6.58 The results of the household survey showed that a 79.0% of people questioned travelled to the centre by private vehicle as either the driver or passenger. A significant number of people stated that they walked into the town centre (19.1%). Less than 1% of people though accessed the centre using public transport.

Perception of Safety

6.59 The centre was relatively busy at the time of the site visits, providing significant natural surveillance across the centre. The perception of crime in Great Dunmow was low when the site visits were carried out. A small amount of graffiti was witnessed on High Street.

6.60 This is verified by crimerate.co.uk who recorded that the prevalence of crime in Great Dunmow in 2020 was 33% below the Essex average.

Opening Hours

6.61 The evening economy comprises several restaurants, hotels and drinking establishments. A number of takeaways are also located in the centre. The supermarkets in the centre are open beyond conventional opening hours of 9am - 5pm, with Co-Op and One Stop open until 10pm.

Environmental Quality

6.62 Great Dunmow is an attractive centre and has a large number buildings of notable quality, including the Old Town Hall, Square 1 restaurant and the Saracens Head Hotel, which enhance the character of the area and result in a pleasant visitor experience. A large number of the shop frontages are of good quality.

6.63 Heritage wayfinding signage was noted at the time of the visit. However, the centre was lacking green relief in parts and improvements within the centre could include planting/hang baskets and inclusion of seating where the pavement width allows, in particular, the area by the War Memorial, which could act as more of a focal point for the centre. Pavements, although largely free from litter at the time of visits, were noted to be in need of improvement.

Barriers to Entry

6.64 The centre offers a number of car parks, but lacks on street parking for short stay visits. This was raised as a significant barrier to entry in the Great Dunmow Neighbourhood Plan (see Section 2).

6.65 Whilst the low vacancy rate in the town centre is good news, it may also mean that a lack of available space (by unit size) could be seen as a barrier to entry. Planning applications seeking amalgamations or sub-divisions to reflect market demand should be considered carefully on their merits.

6.66 Similar to Saffron Walden, the centre in its entirety is designated as a conservation area (designated 2007) and includes a number of listed buildings. Whilst this helps protect its attractive nature, this could potentially represent a barrier to entry for new businesses as any alterations will have to demonstrate a lack of harm to the historic environment.

Customer Views & Behaviour

6.67 When asked what they most liked about Great Dunmow Town Centre, the most common responses from the NEMS household survey were 'choice and range of shops' (30.2%), 'environmental quality of the centre' (11.4%), and 'friendly atmosphere' (4.8%).

6.68 The top three responses to what would encourage respondents to visit the centre more often asked during the household survey were 'improved choice and range of shops' (31.5%), 'more parking' (12.2%) and 'improved non-food shops in the town centre' (11.3%).

Key Issues

6.69 In summary, our health-check of Great Dunmow Town Centre indicates that:

- The composition of the Town Centre is broadly in line with UK averages.
- There are a very low number of vacant units (5.3%). This is a feature of health, but can also mean that it is difficult for new entrants to find an appropriate unit. The Council should listen to market signals on whether amalgamations or sub-divisions are appropriate.
- The centre would benefit from public realm improvements, including a general 'greening' of the centre, and perhaps creating a focal area by the War Memorial.
- The lack of availability of fee car parking is clearly an issue for traders and local residents, and is a feature of the made Neighbourhood Plan. If the town centre started to exhibit features of decline, then no doubt the focus would sharpen on this issue.
- Great Dunmow is an attractive, characterful centre with a pleasant shopping environment.

Stansted Mountfitchet Local Centre

Description

6.70 Stansted Mountfitchet is located to the west of the District and is under 10 miles from Saffron Walden. The centre provides a range of services and is predominantly surrounded by residential dwellings. The majority of the units can be found in two locations; between the east end of Chapel Hill and the south western side of Grove Hill and also along the B1383 between Chapel Hill and Clarence Road.

6.71 Stansted Mountfitchet is classed as a 'Local Centre' within the Uttlesford Local Plan (Adopted 2005).

View of Kings Arms Public House from Mountfitchet Castle Street

Stansted Mountfitchet Social Club, Lower Street

Modern development, Lower Street

Restaurant, Cambridge Road

Overall Composition

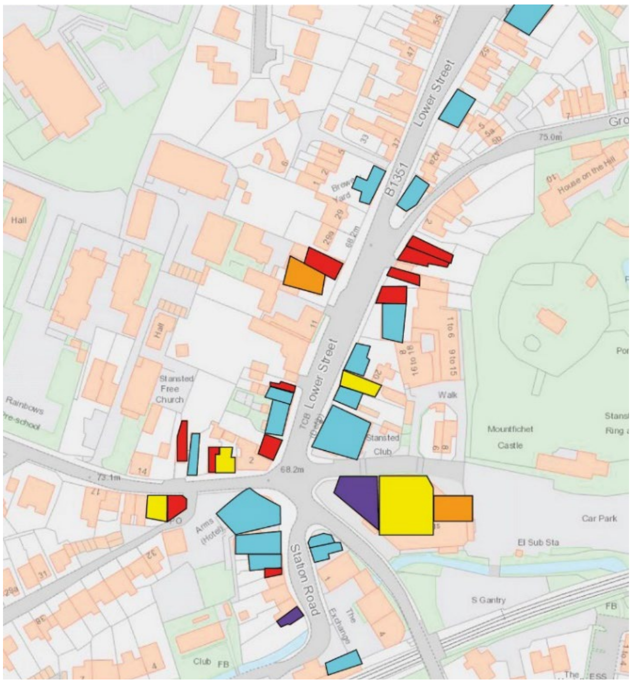
6.72 Figure 33 provides an overview of Stansted Mountfitchet's composition at the time of the site visits in August 2021, compared to the UK averages (2021), as well as a comparison to previous health checks carried out in July 2010.

Figure 33. Stansted Mountfitchet Local Centre Composition

Categories					UK Average Jun-21
	Units 2010 (#)	Units 2010 (%)	Units 2021 (#)	Units 2021 (%)	Units 2021 (%)
Convenience	8	18.6	6	11.8	8.3
Comparison	11	25.6	6	11.8	29.1
Retail Services			14	27.5	16.2
Leisure Services			20	39.2	24.7
Fin. / Bus. Services			4	7.8	8.7
Services	22	51.2		-	-
Vacant	2	4.7	1	2.0	12.0
Total	**43**	**100**	**51**	**100**	**100**

Source: Nexus Planning 2021
Note: Data analysed for 2021 uses the current Goad category definitions to allow comparison with UK averages
Note: Data analysed for 2010 using superseded Goad category definitions to allow comparison with historic data.

Figure 34. Stansted Mountfitchet (Lower Street) Composition Map



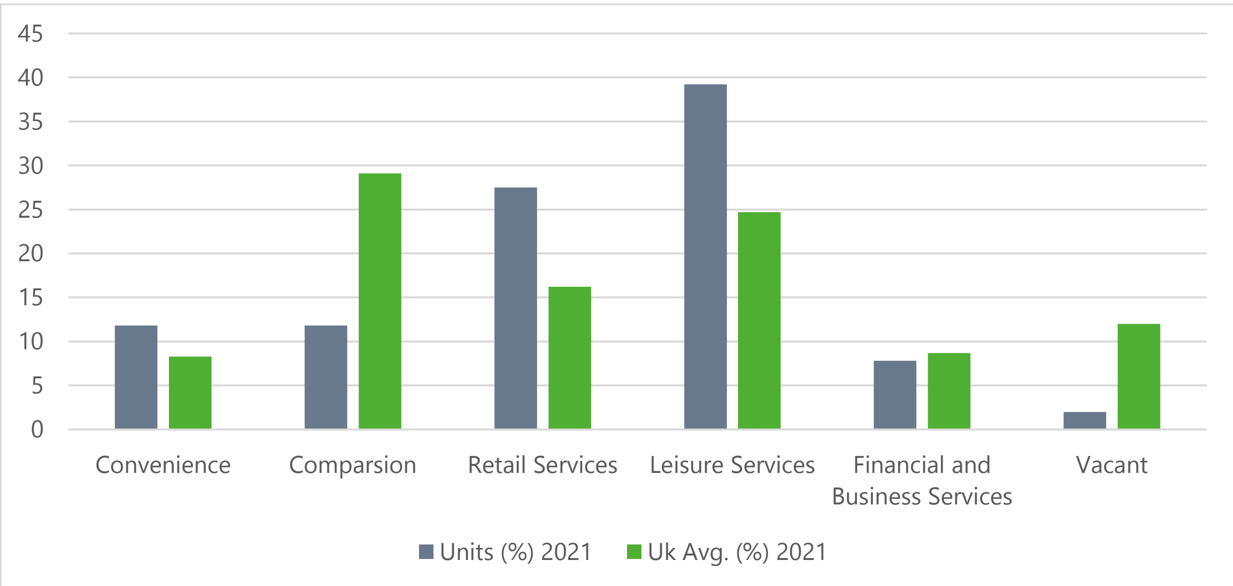
Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

Figure 35. Stansted Mountfitchet (Cambridge Road) Composition Map

Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

6.73 Stansted Mountfitchet is a Local Centre comprising 51 units split between two locations as identified above. The first location is anchored by the junction linking Chapel Hill and Grove Hill, which features The Kings Arms public house and mixed use convenience store, pharmacy and estate agent with a large car park to the rear. This is also positioned within close proximity to the train station. The second location is relatively linear in structure with a range of unit types positioned along the main road.

Figure 36. Centre Composition Comparison Chart



Convenience

6.74 There are 6 convenience units within Stansted Mountfitchet, making up 11.8% of all units, which is slightly higher than the UK average of 8.3%. The number of convenience units within the centre has dropped by two units (6.8%) since 2010.

6.75 The centre features a small Co-op supermarket by the car park to the north east of the train station, as well as a Tesco Express on Cambridge Road. The centre also features an independent bakery, butchers, petrol station, and greengrocers.

Comparison

6.76 There are 6 comparison units within the centre, which make up 11.8% of all units, lower than the UK average of 29.1%. The number of comparison units within the centre has fallen from 25.6% in 2010 to 11.8% in 2021. As such, Stansted Mountfitchet now has a lower percentage of units compared to the UK averages.

6.77 The comparison units comprise largely independent retailers and with the range of shops, including: florists, printing shop and design shop.

Services

6.78 Overall, services equate to 74.5% of units within Stansted Mountfitchet. This has increased by 23.3% since the 2010 survey. There are 14 retail units (27.5%), 20 leisure services (39.2%) and 4 financial and business services (7.8%) within the centre.

6.79 There are numerous health and beauty units within the centre and a number of barber shops. Stansted Mountfitchet has a greater proportion of retail services (27.5%), compared to the UK average (16.2%).

6.80 The centre also has a higher proportion of leisure services (39.2%) compared to the UK average (24.7%). The leisure offer includes the Kings Arms public house, a social club, bars and restaurants as well as a large number of takeaways. For a centre of its size, the centre has an extensive service offer, which is no doubt linked to commuter custom to/from the mainline train station.

6.81 Financial and business services equate to 7.8% of the centre, which is slightly lower than the UK average (8.7%).

Vacancies

6.82 Stansted Mountfitchet has seen a reduction in vacant units (2.0%), compared to the previous 2010 survey (4.7%). The proportion of vacant units in the centre is significantly below the UK average of 12%.

Pedestrian Flows

6.83 During the Nexus site visits, it was observed that that both parts of the centre were quiet during daytime hours. The Tesco Express on Cambridge Road attracted the highest footfall.

Accessibility

6.84 Stansted Mountfitchet has a train station just outside the first town centre boundary near the Kings Arms public house. The train line connects Stansted Mountfitchet to London Liverpool Street and numerous other locations. It is also located approximately 5 miles from Stansted Airport.

6.85 Parking is available in the centre at the locations below. There are also on street parking spots throughout the centre, although there are extensive 'resident permit' zones. At the time of the visit sufficient parking was observed to be available.

- Lower Street - 163 spaces (maximum stay 3 hours for £1.20)
- Crafton Green – 36 spaces (maximum stay 3 hours for £1.20)
- Station car park – 68 spaces (£5 for 2 hours)

6.86 A regular bus service links the centre to the train station and the nearby airport.

6.87 At the time of the visits, traffic was not considered to be heavy and there was no significant congestion.

6.88 The results of the household survey showed that only half of respondents travel to the centre by private vehicle (50.6%), whilst 47.6% had last walked to the centre. Public transport is seldom used.

Opening Hours

6.89 The centre has numerous public houses, bars and brasseries and a social club as well as restaurants catering for a number of cuisines. With the exception of the two small supermarkets, the remainder of the town maintains relatively traditional opening hours.

Environmental Quality

6.90 Stansted Mountfitchet (Lower Street) is an attractive centre; with many attractive buildings throughout including the Stanstead Mountfitchet Social Club, the Kings Arms Public House and a number of dwellings. This area of the centre is within a Conversation Area.

6.91 In comparison, the environmental quality of the Cambridge Road portion of the centre does not benefit from the same historic character.

6.92 There was a noticeable lack of trees or green infrastructure throughout the centre as it is mainly comprised of rows of terraced units. However, some hanging baskets attached to attractive heritage lampposts along Lower Street were noted. Improved signage in both centres would also enhance the character of the area.

6.93 Pavements were found to be litter free at the time of the visit. However, the overall quality of the paving would benefit from improvement.

6.94 The height and size of storefront fascia boards was relatively consistent throughout the centre, and condition of the shopfronts relatively good.

Barriers to Entry

6.95 The lack of clear development sites and available premises may be factors that may reduce the potential for new traders to enter the centre.

6.96 It is evident that the centre is also heavily reliant on its train station, which serves the extensive service economy. It will be important to monitor the health of the centre now that working patterns have changed following the pandemic in order to ascertain whether there has been any significant impact on trade.

Customer Views & Behaviour

6.97 When asked what they most liked about Stansted Mountfitchet Local Centre, the most common responses from the NEMS household survey were ‘choice and range of shops’ (24.0%), and ‘environmental quality of the centre’ (8.7%), and ‘friendly atmosphere’ (8.3%).

6.98 The top three responses to what would encourage respondents to visit the centre more often asked during the household survey stated ‘improved choice and range of shops’ (12.7%), ‘improved food shops in the town centre’ (10.2%), and ‘cheaper parking (7.7%).

Summary

6.99 In summary, our health-check of Stansted Mountfitchet Local Centre indicates that:

- The centre has two small foodstores, but is very accented towards the provision of services which account for 74.5% of all units within Stansted Mountfitchet.
- Stansted Mountfitchet has seen a reduction in vacant units just 2.0% which is an indicator of very good health. However, the centre is likely to be reliant on commuters utilising the train station, and this should be carefully monitored in light of changed working patters following the pandemic.
- Environmental improvements could be made to the centre, including opportunities for greenery and pavement improvements.

Thaxted Local Centre

Description

6.100 Thaxted is located to the east of the District and is approximately seven miles from Saffron Walden. The centre provides a range of services and is surrounded by predominantly residential dwellings. The majority of the units are located along Town Street and Watling Street. The focal point of the centre is the Guildhall (pictured below).

6.101 Thaxted is classed as a 'Local Centre' within the Uttlesford Local Plan (Adopted 2005).

View towards Thaxted Guildhall along Town Street

Gift shop, Town Street

Attractive shop fronts, Town Street

View south east along Town Street

Overall Composition

6.102 Figure 37 provides an overview of Thaxted's composition at the time of the site visits in August 2021, compared to the UK averages (2021). Thaxted was not subject to health-check as part of previous Retail Studies and so there is no comparable composition data form earlier years.

Figure 37. Thaxted Local Centre Composition

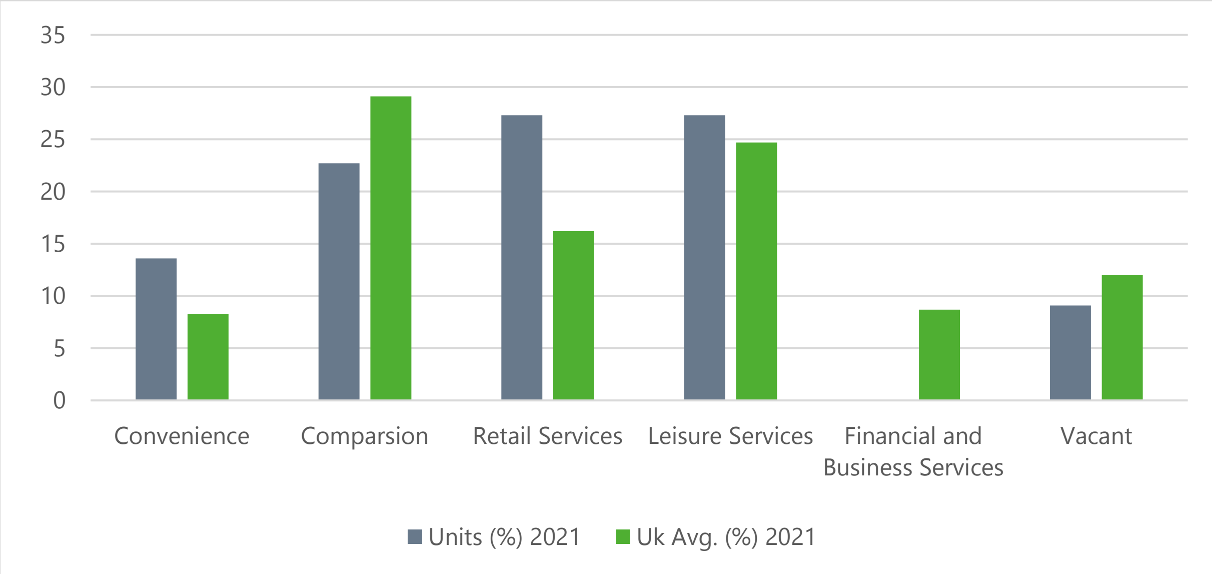
Categories			UK Average Jun-21
	Units 2021 (#)	Units 2021 (%)	Units 2021 (%)
Convenience	3	13.6	8.3
Comparison	5	22.7	29.1
Retail Services	6	27.3	16.2
Leisure Services	6	27.3	24.7
Fin. / Bus. Services	0	0.0	8.7
Vacant	2	9.1	12.0
Total	**22**	**100**	**100**

Source: Nexus Planning 2021

Figure 38. Thaxted Composition Map

Key = Yellow (convenience), Orange (comparison), Red (retail services), Light blue (leisure services), Purple (financial and business services), Dark blue (vacant).

Figure 39. Centre Composition Comparison Chart



Convenience

6.103 There are 3 convenience units within Thaxted, making up 13.6% of all units. This is higher than the UK average of 8.3%.

6.104 The centre features a Nisa Local, a butchers and a tobacconist.

Comparison

6.105 There are 5 comparison units within the centre, which make up 22.7% of all units. As such, Thaxted has a lower percentage of units compared to the UK average of 29.1%.

6.106 The comparison units comprise largely independent retailers. Considering its modest size, it contains a good range of shops, including hardware stores, a pharmacy, charity shop and household goods shop.

Services

6.107 Overall, services equate to 54.6% of units within Thaxted. There are 6 retail units (27.3%) and 6 leisure service units (27.3%) within the centre. There are no financial or business service units within the centre.

Vacancies

6.108 Thaxted has a total of 2 vacant units, equating to 9.1% of the total units in the centre. The proportion of vacant units in the centre is below the UK average of 12%.

Pedestrian Flows

6.109 During the Nexus site visits, it was observed that there was a steady flow of footfall along Town Street. However, this tailed off towards the north of Town Street where the pavements became narrower.

Accessibility

6.110 Thaxted does not have a train station.

6.111 There is a short stay car park located to the rear of Town Street. There is also space for some on street parking along Town Street and Watling Street.

6.112 A regular bus service passes through the town, linking it with nearby towns and centres.

6.113 At the time of the visit, no heavy traffic was noted.

6.114 The results of the household survey showed that 71.1% of people usually travel to the centre by private vehicle, while 23.7% had walked to the centre. A further 5.2% travelled to the centre by bus.

Opening Hours

6.115 The centre has a public house which operates longer hours. However, the remainder of the Local Centre maintains traditional daytime opening hours.

Environmental Quality

6.116 Thaxted is a small and attractive centre. However, there was a noticeable lack of trees or green infrastructure throughout the centre. There is some greenspace adjacent to the St Johns Baptist Church at the top of Town Street, however this is positioned on the edge of the centre.

6.117 Pavements were found to be in relatively good condition, although narrowed near the top of Town Street.

6.118 The height and size of storefront fascia boards was relatively consistent throughout the centre, and the shopfronts were well kept or restored to their historical state.

Barriers to Entry

6.119 The centre in its entirety is designated as a Conservation Area (designated 1968) and includes a number of listed buildings. As a result, whilst the quality of the environment in Thaxted features heavily in its overall attraction, this could potentially represent a barrier to entry for new businesses as any alterations will have to demonstrate a lack of harm to the historic environment.

Customer Views & Behaviour

6.120 When asked what they most liked about Thaxted Local Centre, the most common responses from the NEMS household survey were 'environmental quality of the centre' (33.0%), 'choice of leisure facilities' (12.1%), and 'choice and range of shops' (3.6%).

6.121 There were very few dislikes mentioned in Thaxted. The top three responses to what would encourage respondents to visit the centre more often asked during the household survey stated 'more parking' (6.0%), 'improved leisure facilities' (3.6%) and 'better environment' (3.5%).

Summary

6.122 In summary, our health-check of Thaxted Local Centre indicates that the centre caters very well for its local catchment area. The range of goods offered is limited, but the household survey indicates that there is little discontent with any aspects of the centre.

7 Policy Recommendations

7.1 In this section of the report, and based on our findings in the preceding sections, we provide commentary on the following:

- A summary of what **floorspace capacity** might exist in terms of meeting Uttlesford's convenience goods, comparison goods and food/beverage goods requirements to 2040;
- Drawing on a range of qualitative factors evidenced by this Study, how that capacity might translate into a **strategy for accommodating growth**;
- A review of existing **retail policies** and how those might require updating in the next iteration of the Plan; and
- Recommendations in terms of the **future monitoring** of retail matters across the District.

Identified Retail and Food/Beverage Capacity

7.2 Section 4 of this Study described the empirical survey work undertaken and summarised the market share findings in terms of where residents of the Study Area (Zones 1-6) and the District (Zones 1-3) carry out their convenience and comparison goods shopping. Applying those market shares to census-based population and expenditure estimates for the Study Area geography, capacities for additional convenience, comparison and food/beverage floorspace over the Plan period to 2040 were estimated. These are summarised in Figure 40.

Figure 40. Uttlesford District – Floorspace Capacity Projections to 2040 (Sq m net)

Year	Convenience Goods	Comparison Goods	Food/Beverage
2025	4,200 – 6,100	-300 - -500	540
2030	4,500 – 6,600	-300 - -400	1,140
2035	4,900 – 7,200	100	1,610
2040	5,000 – 7,300	500 - 800	2,150

Strategy for Accommodating Growth

7.3 At the outset, given current economic uncertainties and, more relevantly, pressures on the retail sector, we would stress the need to treat long-term forecasts with caution. As highlighted within the PPG[14]: *"Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (<u>such as the next five years</u>) but will also need to take the lifetime of the plan into account and be regularly reviewed."* (our emphasis)

7.4 Additionally, capacity does not equate to need. Need is more than just a quantitative measure; it should also involve qualitative considerations around issues such any residents' dissatisfaction with the current level of provision, and the potential impacts of realising capacities on the ground from our health check work. Fundamentally, capacity modelling should not be seen as an absolute; it is a guide to a Plan-led approach.

7.5 Any consideration of allocations for new retail floorspace should take into account an assessment of the performance and vitality and viability of a centre in order to ensure that any identified capacity meets both a quantitative and qualitative need, and does not harm existing businesses.

7.6 Taking each of the above factors into account, we consider that the District might benefit from a further main foodstore. The capacity analysis indicates that, even taking the advisory approach of looking to the short-term, there is capacity for between 4,200 – 6,100 sq m of net convenience floorspace over the period to 2025. This capacity is largely generated by the over-trade of existing out-of-centre foodstores within the District itself.

7.7 In terms of where a new foodstore might be located, we consider it unlikely that there will be market demand (nor likely a suitable site) for a large foodstore in either Stansted Mountfitchet or Thaxted. Saffron Walden is well provided for in terms of the combined offer of Waitrose in the Town Centre and Tesco and Aldi outside of the Town Centre.

7.8 The most obvious location is therefore Great Dunmow. The town relies heavily on the out-of-centre Tesco, which trades extremely well. The Town Centre has though shown evidence of decline in terms of both convenience and comparison goods market share (see Figures 15 and 22) and, even if qualitative improvements were made to the small Co-op store in its Town Centre, this would be unlikely to address the capacity we have identified.

[14] (Town Centres and Retail) Planning Practice Guidance, Paragraph: 004, Reference ID: 2b-004-20190722

7.9 We therefore recommend that the Council seeks to identify a suitable site in, or on the edge of, Great Dunmow Town Centre for the provision of a foodstore in order to address the needs of the resident population over the period to 2025 and beyond. Discussions may also be advisory with the Co-op over whether they want to expand their presence.

7.10 Any remaining convenience goods floorspace capacity should be used to bolster existing or proposed stores within existing centres in the retail hierarchy, as well as the planned locations of residential and employment allocations in the development strategy in the emerging Local Plan.

7.11 Turning to comparison goods, it is evident that macro-economic conditions in general, and retail trends towards online shopping, have re-shaped the viability of the sector. As a result, our forecasts show negative floorspace capacity up to 2030. On this basis, we do not recommend that the Council seeks to allocate any floorspace for additional comparison goods over the short-medium term, and instead formulates a policy base on which to preserve and enhance existing floorspace in its town centres.

7.12 The food/beverage sector has been hard-hit by the pandemic and there have been a number of vacancies created as national multiple chains have been forced to close. Our observation is that Uttlesford has not seen the brunt of this, as much of its food-beverage offer is independent. Notwithstanding, our expectation is that there will be a quantum of vacant floorspace in this sector which can be used to accommodate new start-ups. This should be examined by any applicant seeking new floorspace outside of town centres before the Council seeks to approve any such space outside of town centres. Taking this into account, the relatively small quantum of floorspace capacity we have identified (1,140 sq m by 2030) does not, in our view, warrant any specific allocations in the emerging Plan.

Retail Policy Recommendations

7.13 As summarised in Section 3, the current Local Plan (2005) pre-dates the NPPF and its retail policies will need a thorough overhaul under the emerging Local Plan.

7.14 Based on the findings of our report, we would recommend that emerging policies consider each of the following:

- Retail Hierarchy – Paragraph 86 of the NPPF invites local authorities to define a network and hierarchy of town centres in order to promote their long-term vitality and viability. There is no retail hierarchy set out in the 2005 Plan and so it will be necessary to set out a hierarchy for the District in the emerging Plan. This should be evidence-based and should contain a description of the anticipated role and function of each tier of the hierarchy. It is clear from the withdrawn Regulation 19 Plan in 2019 that detailed thought has already been given to a retail hierarchy under draft Policy RET1, which would have seen the creation of a three-tier hierarchy featuring Saffron Walden and Great Dunmow as 'Town Centres', Stansted Mountfitchet and Thaxted as 'Local Centres' and a number of 'proposed local centres' elsewhere. The empirical findings of this Study, and in particular the relative market shares attracted to each destination, should be utilised to support that suggested hierarchy.

- Retail Impact Assessment – The sequential test forms part of the NPPF and we would suggest that any future town centre policies reflect the requirements of the NPPF on the sequential test; namely that it should only apply to applications which are neither in an existing centre nor in accordance with an up-to-date plan; and to reflect the fact that it is not applied to applications for small scale rural offices or other small scale rural development.

  In accordance with the NPPF, retail, office and leisure developments greater than 2,500 sq m proposed in edge-of-centre and out-of-centre locations will be subject to the assessment of the impact criteria set out by Paragraph 90.

  Where appropriate, Local Authorities are entitled to identify local thresholds in accordance with the following considerations identified within the PPG ('Town centres and retail', Paragraph 15):

  - scale of proposals relative to town centres;
  - the existing viability and vitality of town centres;
  - cumulative effects of recent developments;
  - whether local town centres are vulnerable;
  - likely effects of development on any town centre strategy; and
  - impact on any other planned investment.

  Given the smaller size of Uttlesford's town centres, and the large quantum of independent retailers, we consider it likely that the Council may wish to consider implementing an impact threshold at below the NPPF standard of 2,500 sq m. In doing so, the Council would need an appropriate evidence base. The findings of this Study should be used in this regard and the Council may wish to consider a specific exercise in re-examining a suitable threshold. To this end, we note that emerging Policy RET2 under the withdrawn Regulation 19 Plan in 2019 had a suggested threshold of 1,000 sq m. This looks sensible in our estimation, though this threshold should be re-tested for its soundness under a re-consideration of the Plan policies. Such an assessment would incorporate the market share and health-check findings of this Study, alongside any other economic or market considerations at that point in time, and consider whether the 1,000 sq m threshold remained appropriate.

We would stress that whilst a locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the recommended thresholds, national guidance dictates that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed.

The level of detail would typically be agreed with Council officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

- Town Centre Boundaries – In order to enact the sequential and impact test set out in the NPPF, it is necessary to appropriately define Town Centre boundaries. A boundary is defined for Thaxted in its Neighbourhood Plan, as set out at Section 2. The Council had also defined Town Centre boundaries for its Town Centres and Local Centres under the withdrawn Regulation 19 Plan. This Study can be utilised to examine the composition of each centre (see Section 5, and also Appendix D) in order to establish whether any adjustments should be made to the previously proposed boundaries.

  It may also be appropriate to define Primary and Secondary Shopping Frontages. The context for these definitions has changed since the introduction of Class E, as previously such definitions were used to categorise the range of former 'A-class' uses which were permissible or otherwise. This was the approach being take under Policy RET3 of the withdrawn Regulation 19 Plan. We explore below further thoughts on how Primary and Secondary Frontages may still be relevant to consideration of uses/sub-division/amalgamation.

- <u>Class E and 'meanwhile' uses</u> – As highlighted in Section 2, flexible working practices and new formats should be encouraged through planning policies supporting the amalgamation or sub-division of existing town centre units and workspace (where such development results in little loss of net floorspace, but results in a better standard of retail or office accommodation etc.) to encourage investment. Where developments within the town centre are to be carried forward, we would suggest a flexible approach to the provision (or re-provision) of retail floorspace, reflecting the fact that changes of use across Class E are no longer defined as development.

  Nonetheless, Class E of the Use Class Order introduces a situation that will enable retail uses to occupy non-retail Class E premises in out of centre locations, circumventing any relevant 'town centre first' policies. As such, and where there is a risk that an alternative use within Class E (such as retail) would impact on the health of surrounding centres, the Council should attach conditions to the grant of planning permission in <u>out of centre</u> locations to restrict the use to that applied for.

  The Council may also wish to identify aspects of this Study that would form part of an evidence base for any Article 4 directions for future Permitted Development Rights that would result in the loss of Class E floorspace, particularly in the town centres.

  We would also suggest that the Council considers the suitability of adopting a policy that would assist in enabling the re-occupation of longstanding vacant units in the centres that may no longer be fit-for-purpose as retail units, and would benefit from change of use to an alternative town centre use that would support the overall vitality and viability of the centre (including those outside of Class E, such as pubs, bars cinemas and music venues). Such a policy could require evidence of a continuous period of vacancy and marketing (in our experience, an 18-month period is often required) demonstrating that the unit does not have a realistic prospect of being occupied in its current use and would benefit from occupation as an alternative main town centre or residential use. This would have the added benefit of consolidating the retail provision where it is most in demand, ensuring that the town centre remains competitive.

  Policy support should also be provided for 'meanwhile' uses to temporarily occupy vacant units by occupiers seeking to test new business concepts, pop-up stores and event spaces where they support the vitality and viability of the town centre. Other complimentary initiatives that could benefit from policy support could include the construction of click and collect 'hubs' or lockers, and the use of outdoor space for public events (as recently consulted on as a Permitted Development right[15]).

It would be important that any policies aimed at re-occupying vacant units, alongside encouraging meanwhile units, worked appropriately in tandem. Our anticipation would be that meanwhile uses (presumably secured by Planning Condition) would not constitute a use which would re-start the clock on the 18 month vacancy period, in order to ensure that property owners were nor discouraged from exploring such uses.

Monitoring Retail Health

7.15 Nexus carried out town centre health checks across Uttlesford in June and August 2021. These exercises were completed following the resumption of trading retail stores following successive 'lockdowns' across 2020 and 2021 and social distancing measures associated with the Covid-19 pandemic.

7.16 Notwithstanding our up-to-date empirical evidence, the global and UK economy is undergoing a significant change at the time of writing, on the back of the Covid-19 pandemic, and the impact of Brexit, which is not yet fully known. Due to the changing circumstances affecting both retail and leisure markets during the course of 2020 and 2021, we recommend that the Council seeks to monitor the overall situation regarding its retail centres carefully. Specifically, we have noted that the heavily accented service-economy of Stansted Mountfitchet may be vulnerable to changes in commuter working patterns, and that the centre should therefore be carefully monitored.

7.17 The Council may seek to put in place a further 'light touch' review of the health of its centres, and the prevailing economic data available, to support the emerging Local Plan ahead of an Examination in Public.

[15] Government launches public consultation to make outdoor measures for high streets permanent, September 2021

Glossary of Terms

Bulky goods: Goods of a large physical nature (for example DIY, furniture, carpets) that sometimes require large areas for storage or display.
Source: Planning Portal

Capacity: Forecast resident spending within the catchment area, with which to support existing and additional retail floorspace.
Source: Planning Portal

Comparison Goods: Retail items not bought on a frequent basis, for example televisions and white goods (fridges, dishwashers etc.)
Source: Planning Portal

Convenience Goods: Everyday essential items, such as food.
Source: Planning Portal

Edge-of-Centre: For retail purposes, a location that is well connected to, and up to 300 metres from, the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances.
Source: NPPF

Expenditure per Capita: The amount of money spent on retail goods per person in each Zone across the Study Area.

Expenditure: Average annual expenditure levels for various forms of goods, multiplied by the population within the defined Study Area.

Experian Goad: Experian Goad is a retail property intelligence system that helps retail developers, property investors, planning professionals, and commercial agents to identify profitable locations for retail property development and investment projects. It offers comprehensive retail location plans and easy to use reports covering over 3,000 shopping areas in the UK and Ireland.

Experian (MMG3): A population, expenditure and socio-demographic dataset that utilises the 2011 Census release, projected forward by using growth rates derived from Office for National Statistics projections and current age and gender estimates.

Financial & Business Services: An Experian Goad category comprising the likes of banks, building societies, employment agencies, legal services, estate agents and business services.
Source: Experian Goad

Floorplate: Defined as the physical rentable area over a single floor; sometimes called the footprint.

Goad Plans: A plan showing a bird's eye view of a retail centre including the exact location of all retail outlets and vacant premises, fascia name, retail category, and floor space. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured, allowing you to instantly assess the site quality of existing or prospective store locations.
Source: Experian

Independent Retailers: Retailers with less than ten outlets/ stores.
Source: Experian

Leisure Services: An Experian Goad category for town centre leisure units which includes bars, cafes, cinemas, nightclubs, takeaways, hotels, public houses and restaurants. For clarity, it does not include facilities for leisure pursuits e.g. sports centres, swimming pools or health & fitness clubs.
Source: Experian Goad

Main Town Centre Uses: Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).
Source: NPPF

Market Share: The proportion of residents that visit a particular retail destination, derived from household survey results.

National Multiple: Defined as retailers with ten or more outlets/ stores.
Source: Experian

Prime Unit: 'Prime' is a widely used term within real estate investment circles to describe building and location quality. There are no universally agreed definition, however, and no consistency in the distinctions applied to prime or non-prime property.
Source: Colliers

Primary shopping area: Defined area where retail development is concentrated.
Source: NPPF

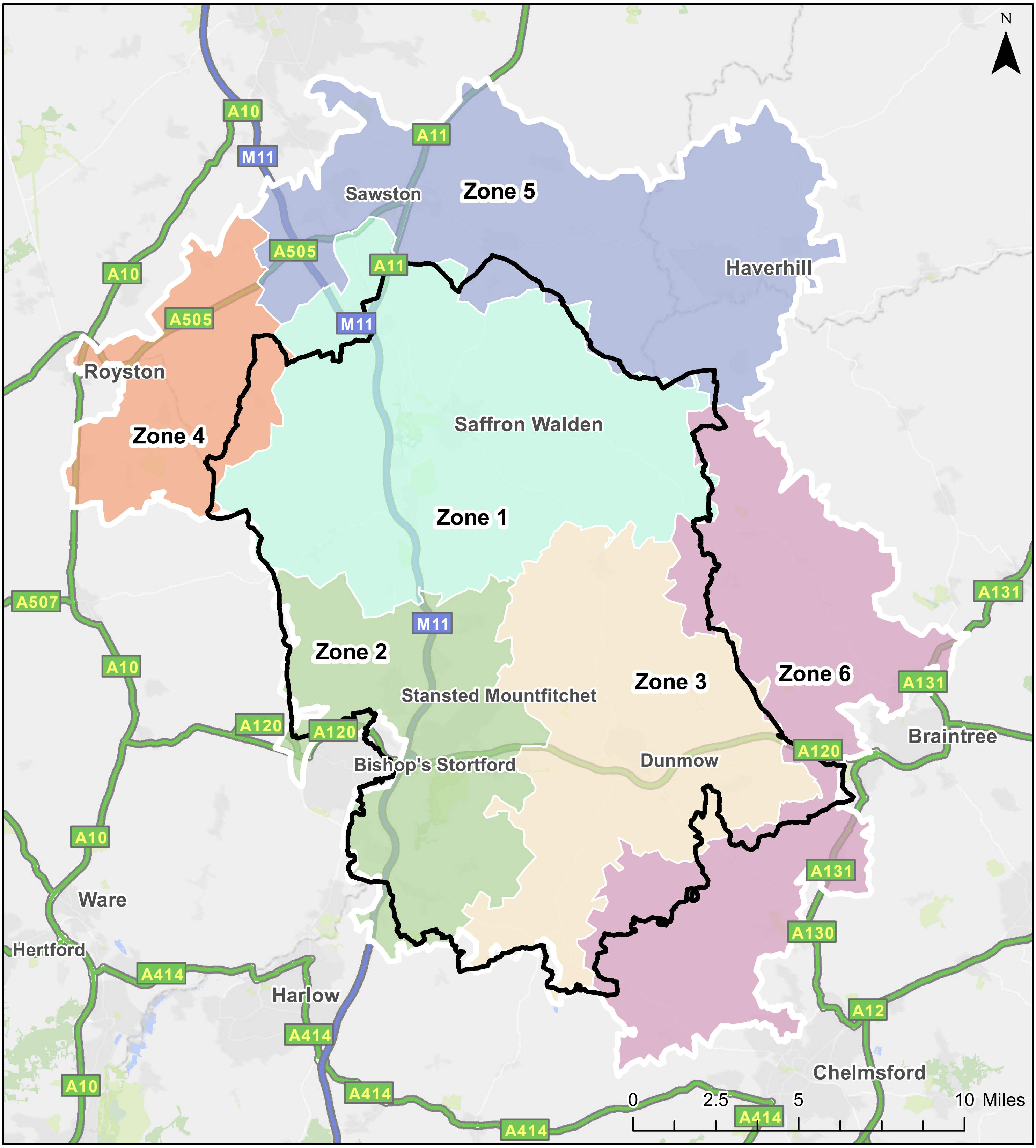
Retail Floorspace: Total floor area of the property that is associated with all retail uses in square metres. May be expressed as a net figure (the sales area) or in gross (including storage, preparation and staff areas).
Source: Planning Portal

Retail Impact:	The potential effects of proposed retail development upon existing shops. *Source: Planning Portal*
Retail Services:	An Experian Goad category comprising the likes of dry cleaners, health & beauty, opticians, photo processing, post offices and travel agents. *Source: Experian Goad*
Sequential Approach:	A planning principle that seeks to identify, allocate or develop certain types or locations of land before others. For example, brownfield housing sites before greenfield sites, or town centre retail sites before out-of-centre sites. *Source: Planning Portal*
Sales Density:	Turnover, per square metre. Various retail planning sources such as GlobalData UK Food & Grocery Company Briefing Reports and Mintel Retail Rankings provide average (or 'benchmark') sales densities for national multiple convenience retailers.
Special Forms of Trading:	Special forms of trading (SFT) are defined as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies. *Source: Experian*
Study Area:	The geographical area where the household survey is carried out, based on postal sectors that make up the 6 Zones that cover Uttlesford District and its surrounding hinterland.
Trade draw:	The proportion of trade that a development is likely to receive from customers within and outside its catchment area. It is likely that trade draw will relate to a certain geographic area (i.e. the distance people are likely to travel) and for a particular market segment (e.g. convenience retail). The best way of assessing trade draw where new development is proposed is to look at existing proxies of that type of development in other areas. *Source: PPG Paragraph: 018 Reference ID: 2b-018-20190722*
Turnover:	Amount of sales per unit area of retail floorspace *Source: Planning Portal*
Town Centre:	Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres. *Source: NPPF*

Appendix A: Study Area Plan

Uttlesford Retail Capacity Study

Study Area Zones



Legend

Zone 1	Zone 3	Zone 5
Zone 2	Zone 4	Zone 6

NEXUS PLANNING

Appendix B: NEMS Household Survey Results

NEMS market research
22 Manor Way
Belasis Hall Technology Park
Billingham
TS23 4HN
Tel 01642 37 33 55
www.nemsmr.co.uk

Uttlesford Household Survey
for
Nexus Planning

August 2021

Job Ref: 080821

Table of Contents

Introduction

1.1 Research Background & Objectives

To conduct a survey amongst residents in and around the Uttlesford District Council area to assess shopping habits for main food and grocery, top-up food, non-food shopping and leisure activities.

1.2 Research Methodology

A total of 1002 interviews were conducted between Friday 6th and Wednesday 25th August 2021. Interviews were conducted using NEMS in-house CATI (Computer Assisted Telephone Interviewing) Unit and Face to Face interviewing to ensure the sample is as representative as possible. Respondents were contacted during the day and in the evening. All respondents were the main shopper in the household, determined using a preliminary filter question.

1.3 Sampling

1.3.1 Survey Area

The survey area was segmented into 6 zones defined by postcode sector. The zone details were:

Zone	Postcode Sectors	Number of Interviews
1	CB10 1, CB10 2, CB11 3, CB11 4	169
2	CM22 6, CM22 7, CM23 1, CM24 8	129
3	CM6 1, CM6 2, CM6 3, CM6 4	147
4	SG8 7, SG8 8	101
5	CB21 4, CB21 6, CB22 3, CB22 4, CB9 0, CB9 7, CB9 8, CB9 9	277
6	CM1 4, CM3 1, CM7 4, CM7 5, CM77 6	179
Total		**1002**

1.3.2 Telephone Numbers

The landline numbers are generated through a process known as Random Digit Dialling (RDD), whereby we start with known ‘seed’ numbers and then generate all possible number combinations around these. Known business numbers are removed and the remaining numbers are randomly sorted to give each number the same and equal chance of being selected.

The benefit of using RDD numbers (as opposed to those generated from pre-existing lists such as telephone directories and Electoral Register entries) is that ex-directory numbers are also included in the survey sample. In practice, this means that the sample provided is in no way preselected, and that consumers who had opted-out of providing their telephone contact details to directory operators had the opportunity to take part in the research, thereby removing potential bias in the sample.

Mobile numbers were also included in the survey sample to further increase the inclusivity of the survey, given the increase in the number of mobile-only households amongst certain demographic groups (especially younger people and lower income households). These numbers are generated from a variety of commercial sources, where permission has been given to use such contact information for research and marketing purposes.

We don’t screen against the TPS (Telephone Preference Service) database, again because the demographic profile of TPS registered numbers is slightly different to the rest of the population. In addition, there is no legal requirement to screen against TPS registered numbers; market research is not classified as unsolicited sales and marketing.

1.3.3 Time of Interviewing

Approximately two-thirds of all calls are made outside normal working hours.

1.3.4 Sample Profile

It should be noted that as per the survey's requirements, the profile of respondents is that of the main shopper / person responsible for most of the food shopping in the household. As such it will always differ from the demographic profile of all adults within the survey area. With any survey among the main shopper / person responsible for most of the food shopping in the household the profile is typically biased more towards females and older people. The age of the main shopper / person responsible for most of the food shopping in the household is becoming older due to the financial constraints on young people setting up home.

A number of measures are put in place to ensure the sample is representative of the profile of the person responsible for most of the food / shopping in the household.

First of all, interviewing is normally spread over a relatively long period of time, certainly longer than the theoretical minimum time it would take. This allows us time to call back people who weren't in when we made the first phone call. If we only interview people who are at home the first time we call, we over-represent people who stay at home the most; these people tend to be older / less economically active.

We also control the age profile of respondents; this is a two-stage process. First of all, we look at the age profile of the survey area according to the latest Census figures. Using a by-product from additional data we collect from a weekly telephone survey of a representative sample of all adults across the country we know the age profile of the main shopper in any given area. This information is from data based on in excess of 100,000 interviews and is regularly updated and is therefore probably the most accurate and up to date information of its kind.

Stratified random sampling helps ensure that the sample is as representative as possible. While the system dials the next randomly selected number for interviewers, all calls are made by interviewers; no automated call handling systems are used.

1.3.5 Monitoring of Calls

At least 5% of telephone interviews are randomly and remotely monitored by Team Leaders to ensure the interviewing is conducted to the requisite standard. Both the dialogue and on-screen entries are monitored and evaluated. Interviewers are offered re-training should these standards not be met.

1.4 Weightings

To correct the small differences between the sample profile and population profile, the data was weighted. The population is of the main shopper in the household. Weightings have been applied to age bands based on an estimated age profile of main shoppers (see section 1.3.3 for details). The weighted totals differ occasionally from the adjusted population due to rounding error. Details of the age weightings are given in the table below:

Age	Main Shopper Profile (%)	Interviews Achieved	Age Weightings
18-34	19.04%	101	1.8889
35-44	18.12%	119	1.5253
45-54	19.40%	169	1.1500
55-64	19.37%	194	1.0005
65+	24.07%	419	0.5757
Total		**1002**	

Further weightings were then applied to the zone date, to adjust zone samples to be representative by population. Details of those weightings are given in the table below:

Zone	Population *	Interviews Achieved	Interviews Achieved (Weighted by Age)	Zone Weightings
1	34,516	169	177	0.9118
2	26,319	129	135	1.0887
3	29,997	147	154	1.0009
4	11,375	101	58	0.7367
5	56,660	277	290	1.0534
6	36,593	179	188	1.0688
Total	**195,460**	**1002**	**1002**	

* Source: 2011 Census

1.5 Statistical Accuracy

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 and population – this is known as the standard error.

The standard error can be estimated using statistical calculations based on the sample size, the population size and the level of response measured (as you would expect you can potentially get a larger error in a 50% response than say a 10% response simply because of the magnitude of the numbers).

To help understand the significance of this error, it is normally expressed as a confidence interval for the results. Clearly to have 100% accuracy of the results would require you to sample the entire population. The usual confidence interval used is 95% - this means that you can be confident that in 19 out of 20 instances the actual population behaviour will be within the confidence interval range.

For example, if 50% of a sample of 1002 answers "Yes" to a question, we can be 95% sure that between 47.9% and 53.1% of the population holds the same opinion (i.e., +/- 3.1%). The following is a guide showing confidence intervals attached to various sample sizes from the study:

%ge Response	95% confidence interval
10%	±1.9%
20%	±2.5%
30%	±2.8%
40%	±3.0%
50%	±3.1%

1.6 Data Tables

Tables are presented in question order with the question number analysed shown at the top of the table. Those questions where the respondent is prompted with a list of possible answers are indicated in the question text with a suffix of [PR].

The sample size for each question and corresponding column criteria is shown at the base of each table. A description of the criteria determining to whom the question applies is shown in italics directly below the question text; if there is no such text evident then the question base is the full study sample. If the tabulated data is weighted (indicated in the header of the tabulations), in addition to the sample base, the weighted base is also shown at the bottom of each table.

Unless indicated otherwise in the footer of the tabulations, all percentages are calculated down the column. Arithmetic rounding to whole numbers may mean that columns of percentages do not sum to exactly 100%. Zero per cent denotes a percentage of less than 0.05%.

Percentages are calculated on the number of respondents and not the number of responses. This means that where more than one answer can be given to a question the sum of percentages may exceed 100%. All such multi-response questions are indicated in the tabulated by a suffix of [MR] on the question text.

Where appropriate to the question, means are shown at the bottom of response tables. These are calculated in one of two ways: if the data is captured to a coded response a weighted mean is calculated and the code weightings are shown as a prefix above the question text; if actual specific values were captured from respondents these individual numbers are used to calculate the mean.

Appendix 1:

Data Tabulations

By Zone Filtered Nulls & SFT

(Weighted)

Q01 At which store do you usually undertake your main food and grocery shopping?
Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Zone 1														
Aldi, (Thaxted Road), Knight Park, Saffron Walden	7.4%	63	22.3%	36	1.5%	2	7.2%	10	0.0%	0	2.5%	6	6.6%	10
Local shops, Saffron Walden Town Centre, CB10 1HD	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Tesco Express, Pleasant Valley, Saffron Walden	0.4%	3	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	2	0.0%	0
Tesco Superstore, Radwinter Road, Saffron Walden	11.0%	93	45.9%	73	1.5%	2	3.2%	4	0.0%	0	5.3%	13	0.7%	1
Waitrose, Hill Street, Saffron Walden	6.3%	54	24.2%	39	2.1%	2	0.9%	1	0.9%	0	4.7%	11	0.0%	0
Zone 2														
Clifford's Country Grocers and Farm Shop, Pledgdon Hall Cottages, Henham, CM22 6BJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Church Road, Stansted Mountfitchet	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, The Heath, Hatfield Heath, Bishop's Stortford, CM22 7EB	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Cambridge Road, Stansted Mountfitchet	0.1%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3														
A J Coulson, High Street, Great Dunmow, Dunmow, CM6 1AE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Budgens, The Post Office, Station Road, Felsted, CM6 3DG	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, White Street, Great Dunmow	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Thaxted Town Centre, CM6 2PL	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Stortford Road, Great Dunmow	12.9%	109	0.0%	0	8.4%	9	66.9%	89	0.0%	0	0.0%	0	6.9%	11
Zone 4														
Barley Stores and Post Office, Church End, Barley, Royston, SG8 8JW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local market, Royston Town Centre, SG8 7XB	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Zone 5														
Aldi, Lordscroft Lane, Haverhill	5.2%	44	0.3%	1	0.0%	0	0.0%	0	0.0%	0	18.3%	44	0.0%	0
Co-op, High Street, Linton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Co-op, High Street, Sawston	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	3	0.0%	0
Iceland, High Street, Haverhill	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0
Lidl, Ehringshausen Way, Haverhill	1.5%	13	0.7%	1	0.0%	0	0.4%	1	0.0%	0	4.7%	11	0.0%	0
Sainsbury's, Haycocks Road, Haverhill	5.0%	42	0.7%	1	0.0%	0	0.0%	0	0.0%	0	17.4%	41	0.0%	0
Spar, High Street, Sawston, Cambridge, CB22 3BG	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Tesco Superstore, Cangle Road, Haverhill	7.6%	64	0.0%	0	0.0%	0	0.0%	0	0.0%	0	27.0%	64	0.0%	0
Zone 6														
Co-op, Brook Street, Great Bardfield	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Dickens Place, Copperfield Road, Chelmsford	2.4%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.1%	20
Outside Survey Area														
Aldi, Clock Tower Retail Park, Westway, Chelmsford, CM1 3FJ	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Aldi, Durham Road, Royston	1.0%	9	0.0%	0	0.0%	0	0.0%	0	13.3%	7	1.0%	2	0.0%	0
Aldi, First Avenue, Harlow,	0.3%	2	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
CM20 3FA														
Aldi, Histon Road, Arbury, Cambridge, CB4 3JD	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Aldi, London Road, Bishop's Stortford	4.0%	34	0.0%	0	26.6%	30	3.1%	4	0.0%	0	0.0%	0	0.0%	0
Aldi, Parkway, Chelmsford, CM2 7FS	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Aldi, Springfield Road, Springfield, Chelmsford	1.1%	10	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	5.2%	8
Asda, Coldhams Lane, Cambridge	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	2	0.0%	0
Asda, Watergardens, Harlow	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Western Way, Bury Saint Edmunds, IP33 3SP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Co-op, Colchester Road, Halstead, CO9 2DY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Co-op, Havengore, Springfield, Chelmsford, CM1 6JP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Iceland, Bank Street, Braintree	0.5%	4	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	1.6%	2
Lidl, Newmarket Road, Cambridge	0.2%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Rayne Road, Braintree	1.6%	14	0.0%	0	0.0%	0	2.4%	3	0.0%	0	0.0%	0	7.0%	11
Local shops, Swaffham Town Centre, PE37 7AB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Marks & Spencer Simply Food, Braintree Retail Park, Braintree	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2
Marks & Spencer, Durham Way, Royston	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0
Marks & Spencer, South Street, Bishops Stortford	0.2%	2	0.0%	0	1.0%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Westway, Clock Tower Retail Park, Chelmsford, CM1 3FJ	0.1%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Morrisons, Amwell Street, Hoddesdon, EN11 8UD	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Baldock Street, Royston	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0
Morrisons, Braintree Road, Witham, CM8 2GD	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Morrisons, Broad Street, Cambridge	0.3%	3	0.0%	0	0.0%	0	0.0%	0	3.6%	2	0.4%	1	0.0%	0
Morrisons, Limebrook Way, Maldon, CM9 6GG	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Sainsbury’s, Birchanger Motorway Services, Bishops Stortford	0.2%	2	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s, Brooks Road, Cambridge	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	2	0.0%	0
Sainsbury’s, Fifth Avenue, Harlow	0.3%	3	0.0%	0	2.1%	2	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s, Jackson Square, Bishops Stortford	1.2%	10	1.2%	2	6.5%	7	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s, The Thorley Centre, Bishops Stortford	0.5%	4	0.0%	0	2.0%	2	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s, Tofts Walk, Braintree	1.3%	11	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	6.4%	10
Sainsbury’s, White Hart Lane, Chelmsford	1.2%	10	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	5.8%	9
Sainsbury's Superstore, Banson's Lane, Chipping Ongar, Ongar, CM5 9AR	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Eddington Avenue, Cambridge, CB3 1SE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Sainsbury's Superstore, Third Avenue, Letchworth Garden City, SG6 2HX	0.2%	2	0.0%	0	0.0%	0	0.0%	0	3.2%	2	0.0%	0	0.0%	0
Tesco Express, Rectory Terrace, High Street, Cherry Hinton, Cambridge, CB1 9HU	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	3	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Tesco Extra, Fordham Road, Newmarket, CB8 7AH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Tesco Extra, Old North Road, Royston	4.7%	40	2.2%	3	0.0%	0	0.0%	0	66.0%	33	1.4%	3	0.0%	0
Tesco Extra, Viking Way, Bar Hill, Cambridge, CB23 8EL	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Tesco Superstore, Bishops Park Centre, Lancaster Way, Bishops Stortford	3.9%	33	0.0%	0	28.6%	32	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Church Langley Centre, Harlow	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, East Road / Edinburgh Way, Harlow	0.4%	3	0.0%	0	2.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Great Notley, Braintree	3.2%	27	0.0%	0	0.0%	0	3.2%	4	0.0%	0	0.0%	0	15.1%	23
Tesco Superstore, Market Place, Braintree	0.4%	3	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	1.5%	2
Tesco Superstore, Marks Farm, Braintree	2.2%	18	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	11.6%	18
Tesco Superstore, Princes Road, Chelmsford	1.6%	14	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	7.8%	12
Tesco Superstore, Springfield Road, Chelmsford	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	3
Tesco Superstore, Yarrow Road, Fulbourn, Cambridge	1.3%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	11	0.0%	0
Waitrose, Fred Archer Way, Newmarket, CB8 8NY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Waitrose, Hauxton Road, Trumpington, Cambridge	1.3%	11	0.0%	0	0.0%	0	0.0%	0	4.5%	2	3.8%	9	0.0%	0
Waitrose, Northgate End, Bishops Stortford	1.8%	15	0.0%	0	10.5%	12	0.0%	0	0.0%	0	0.0%	0	2.0%	3
Others														
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		846		160		112		133		50		238		154
Sample:		852		154		108		128		85		228		149

Q02 Which retailer do you purchase your main food internet / home delivery shopping from?
Internet / delivery at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Asda	2.6%	4	0.0%	0	5.5%	1	6.0%	1	0.0%	0	0.0%	0	5.0%	2
Iceland	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s	17.1%	25	25.2%	4	29.6%	6	16.2%	3	5.0%	0	18.3%	9	7.0%	2
Tesco	53.2%	79	47.7%	8	43.8%	9	45.9%	9	40.0%	3	55.9%	28	65.5%	22
Morrisons	0.3%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	0	0.0%	0	0.0%	0
Ocado	24.4%	36	17.2%	3	21.2%	4	31.9%	6	50.0%	4	22.1%	11	22.5%	7
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hello Fresh	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
(Don't know / varies)	2.0%	3	10.0%	2	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0
Weighted base:		148		17		20		19		8		50		33
Sample:		142		15		17		18		16		47		29

Q03 What is the main reason you choose …. (STORE MENTIONED AT Q01) for your main food and grocery shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Accessibility by public transport	0.2%	2	0.5%	1	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.3%	1
Car parking prices	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Car parking provision	1.5%	15	2.1%	4	2.3%	3	0.4%	1	4.4%	3	0.4%	1	2.2%	4
Choice of food goods available	7.6%	76	5.9%	10	8.4%	11	10.7%	16	8.1%	5	6.4%	19	7.7%	14
Choice of shops nearby selling non-food goods	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Choice of shops selling food goods	0.4%	4	1.0%	2	0.5%	1	0.4%	1	1.3%	1	0.0%	0	0.0%	0
Cleanliness	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Delivery service	2.0%	20	1.6%	3	1.3%	2	2.6%	4	0.0%	0	0.6%	2	4.9%	9
Easy to get to by car	1.9%	19	3.2%	6	2.7%	4	1.4%	2	3.7%	2	0.4%	1	2.3%	4
Entertainment / events	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good internal layout	0.3%	3	0.0%	0	0.9%	1	0.0%	0	0.7%	0	0.4%	1	0.0%	0
Good service / friendly staff	0.6%	6	0.3%	1	0.9%	1	1.0%	2	0.0%	0	0.9%	3	0.0%	0
Habit / always use it / preference for retailer	7.6%	77	6.4%	11	8.3%	11	3.8%	6	2.9%	2	8.9%	26	11.1%	21
Internet shopping is convenient	8.8%	88	7.1%	13	9.2%	12	7.3%	11	9.5%	6	11.2%	33	7.5%	14
Lower prices	13.7%	137	14.7%	26	17.8%	24	9.1%	14	6.3%	4	15.4%	45	13.1%	25
Loyalty card / points scheme	2.0%	20	2.2%	4	2.0%	3	1.0%	2	1.3%	1	3.5%	10	0.7%	1
Near to home	29.0%	290	24.0%	42	24.5%	33	42.7%	66	26.0%	15	29.2%	85	26.3%	49
Near to work	1.2%	12	0.6%	1	1.3%	2	0.7%	1	0.0%	0	1.3%	4	2.3%	4
Nice shopping environment	0.6%	6	1.5%	3	1.3%	2	0.0%	0	0.0%	0	0.4%	1	0.6%	1
Only one in the area / no other choice	3.3%	33	4.8%	8	0.5%	1	9.7%	15	11.1%	6	0.0%	0	1.2%	2
Provision of leisure facilities nearby	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	2	0.0%	0
Provision of services nearby, such as banks and other financial services	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Public information, signposts and public facilities	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Quality of food goods available	5.4%	54	7.2%	13	3.6%	5	2.5%	4	6.5%	4	5.7%	17	6.4%	12
Quality of shops selling food goods	0.6%	6	1.3%	2	0.0%	0	1.2%	2	0.0%	0	0.6%	2	0.0%	0
Safety (during the day)	0.6%	6	2.1%	4	1.2%	2	0.0%	0	0.0%	0	0.2%	1	0.0%	0
Safety (during the evening / night time)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Staff discount / work there	1.8%	18	0.5%	1	3.7%	5	1.6%	2	0.7%	0	1.4%	4	2.7%	5
Value for money	5.3%	53	8.1%	14	2.8%	4	1.0%	2	9.4%	5	7.2%	21	3.6%	7
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Close to family	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2
Covid related reasons	1.4%	14	0.8%	1	0.5%	1	1.0%	2	2.2%	1	2.1%	6	1.8%	3
Good opening hours	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	2	0.0%	0
(Don't know / no reason in particular)	3.5%	35	3.9%	7	6.2%	8	1.9%	3	3.1%	2	2.6%	8	4.2%	8
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

Q04 What, if anything, is the one thing you most dislike about …. (STORE MENTIONED AT Q01) ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Change layout too often	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.7%	0	1.1%	3	0.3%	1
Expensive parking	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Difficult to get to	0.2%	2	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Expensive	5.6%	56	5.2%	9	5.4%	7	14.4%	22	1.5%	1	4.4%	13	2.0%	4
Lack of cycle parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Difficult to park / lack of parking	1.4%	14	0.6%	1	3.4%	5	0.0%	0	0.0%	0	2.6%	8	0.6%	1
Lack of public transport	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Limited range of goods	9.4%	95	11.4%	20	4.6%	6	12.6%	19	5.8%	3	10.9%	32	7.3%	14
No petrol station	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	1	0.0%	0
Poor internal layout	0.9%	9	3.2%	6	0.0%	0	0.7%	1	1.5%	1	0.4%	1	0.0%	0
Poor quality	3.1%	31	1.7%	3	0.5%	1	4.6%	7	1.5%	1	4.6%	13	3.4%	6
Preference for retailer	0.3%	3	0.0%	0	0.0%	0	1.0%	2	0.0%	0	0.0%	0	0.7%	1
Staff rude / unhelpful	1.6%	16	0.8%	1	0.5%	1	0.4%	1	0.7%	0	2.6%	7	2.7%	5
Too busy	2.5%	25	1.3%	2	5.3%	7	1.1%	2	2.0%	1	1.6%	5	4.4%	8
Too far away	1.1%	11	1.0%	2	0.5%	1	0.0%	0	2.0%	1	1.6%	5	1.5%	3
Too small	2.9%	29	5.2%	9	3.9%	5	4.2%	7	2.0%	1	0.0%	0	3.9%	7
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet related reasons (Can't choose own produce, delivery fees, substitutions etc.)	3.6%	36	1.8%	3	4.2%	6	2.1%	3	2.9%	2	5.9%	17	2.6%	5
Not a nice shopping environment	0.8%	8	1.3%	2	0.0%	0	0.7%	1	2.0%	1	1.3%	4	0.0%	0
Not an ethical company	0.4%	4	0.0%	0	0.0%	0	0.7%	1	0.7%	0	1.0%	3	0.0%	0
(Don't know)	2.0%	20	2.5%	4	1.7%	2	0.7%	1	2.5%	1	2.3%	7	2.3%	4
(Nothing)	63.5%	636	63.7%	113	69.0%	93	56.7%	87	74.2%	43	59.4%	172	68.1%	128
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

Mean score [Times a month]:

Q05 How often do you normally do your main food shopping at …. (STORE MENTIONED AT Q01?)

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Daily	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.2%	1	0.0%	0
At least two times a week	12.2%	123	15.0%	27	7.3%	10	11.2%	17	9.3%	5	12.6%	36	14.4%	27
At least once a week	70.6%	708	74.2%	131	71.1%	96	66.0%	102	71.3%	42	69.9%	203	71.6%	134
At least once a fortnight	12.5%	125	10.2%	18	18.2%	25	13.6%	21	9.1%	5	11.6%	34	12.0%	22
At least once a month	3.4%	34	0.0%	0	2.5%	3	5.9%	9	7.3%	4	4.6%	13	2.1%	4
At least every two months	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less often	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	2	0.0%	0
Have only visited once	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.0%	10	0.6%	1	0.5%	1	3.2%	5	3.1%	2	0.6%	2	0.0%	0
Mean:		*4.16*		*4.40*		*3.97*		*4.00*		*3.97*		*4.16*		*4.27*
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

Q06 How do you normally travel to …. (STORE MENTIONED AT Q01)?

Not Internet / delivery at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Car / van (as driver)	82.7%	706	81.7%	130	88.1%	101	80.5%	108	80.2%	40	78.8%	189	88.5%	137
Car / van (as passenger)	9.7%	83	10.8%	17	5.0%	6	12.8%	17	12.9%	6	11.2%	27	6.3%	10
Bus (including the busway or guided bus), minibus or coach	1.0%	8	0.7%	1	0.5%	1	1.1%	2	4.3%	2	0.3%	1	1.6%	2
Motorcycle, scooter or moped	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	4.9%	42	5.5%	9	3.1%	4	4.1%	5	1.7%	1	7.7%	19	3.2%	5
Taxi	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.9%	0	1.3%	3	0.4%	1
Train	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Metro	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bicycle	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Mobility scooter / disability vehicle	0.3%	3	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.7%	6	0.3%	1	2.7%	3	1.6%	2	0.0%	0	0.0%	0	0.0%	0
Weighted base:		854		160		115		135		50		240		155
Sample:		860		154		112		129		85		230		150

Mean score [Minutes]:

Q07 How long did your last journey to …. (STORE MENTIONED AT Q01) take?
Not Internet / delivery at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
1 - 10 minutes	63.2%	540	70.0%	112	48.7%	56	70.1%	94	58.1%	29	66.7%	160	57.5%	89
11 - 20 minutes	31.0%	265	23.8%	38	42.6%	49	25.1%	34	35.1%	18	29.7%	71	35.6%	55
21 - 30 minutes	3.6%	31	4.4%	7	5.1%	6	2.8%	4	3.4%	2	1.3%	3	6.1%	9
31 - 40 minutes	0.8%	7	0.9%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	5	0.0%	0
41 - 50 minutes	0.2%	2	0.0%	0	0.5%	1	0.0%	0	2.6%	1	0.0%	0	0.0%	0
51 - 60 minutes	0.2%	2	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Over an hour	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
(Don't know / can't remember)	0.5%	4	0.7%	1	0.5%	1	0.9%	1	0.9%	0	0.3%	1	0.0%	0
(Refused)	0.5%	4	0.3%	1	1.1%	1	1.1%	2	0.0%	0	0.0%	0	0.4%	1
Mean:		*10.96*		*10.03*		*13.96*		*9.70*		*12.13*		*9.87*		*12.12*
Weighted base:		854		160		115		135		50		240		155
Sample:		860		154		112		129		85		230		150

Mean score [£]:

Q08 How much on average does your household normally spend on main food and grocery shopping in a week?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
£1 - £5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£6 - £10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£11 - £15	0.5%	5	0.9%	2	0.0%	0	0.0%	0	2.4%	1	0.6%	2	0.0%	0
£16 - £20	1.0%	10	1.0%	2	0.0%	0	0.4%	1	0.0%	0	2.2%	6	0.7%	1
£21 - £25	0.9%	9	0.6%	1	0.5%	1	0.4%	1	0.7%	0	0.8%	2	2.0%	4
£26 - £30	2.0%	20	1.5%	3	1.7%	2	1.1%	2	0.0%	0	2.9%	8	2.8%	5
£31 - £35	1.5%	15	0.0%	0	0.9%	1	0.7%	1	2.9%	2	2.0%	6	2.8%	5
£36 - £40	4.0%	40	4.6%	8	2.1%	3	3.7%	6	5.6%	3	5.5%	16	2.1%	4
£41 - £45	2.3%	23	1.7%	3	0.5%	1	2.1%	3	5.1%	3	4.2%	12	0.7%	1
£46 - £50	6.3%	64	7.5%	13	2.8%	4	4.9%	8	9.4%	5	7.8%	23	5.8%	11
£51 - £60	11.5%	116	14.8%	26	9.5%	13	11.0%	17	12.5%	7	11.8%	34	9.6%	18
£61 - £70	6.6%	67	8.4%	15	2.3%	3	4.5%	7	4.4%	3	9.1%	27	6.6%	12
£71 - £80	11.2%	112	7.9%	14	13.7%	18	13.0%	20	12.0%	7	10.3%	30	12.1%	23
£81 - £90	5.7%	58	3.2%	6	10.7%	14	5.0%	8	4.4%	3	5.6%	16	5.8%	11
£91 - £100	15.3%	153	15.2%	27	18.4%	25	16.0%	25	12.3%	7	11.8%	34	18.8%	35
£101 - £110	1.9%	19	1.6%	3	2.0%	3	1.4%	2	2.7%	2	1.7%	5	2.7%	5
£111 - £120	5.9%	59	8.0%	14	4.7%	6	5.0%	8	2.7%	2	6.4%	19	5.6%	10
£121 - £130	2.1%	21	2.5%	4	1.7%	2	5.3%	8	2.4%	1	0.6%	2	1.6%	3
£131 - £140	1.7%	17	1.0%	2	0.5%	1	3.1%	5	1.5%	1	1.5%	4	2.5%	5
£141 - £150	5.8%	58	4.8%	8	5.6%	8	8.2%	13	1.5%	1	5.2%	15	7.3%	14
£151 - £175	1.3%	13	1.1%	2	3.4%	5	1.5%	2	1.3%	1	0.4%	1	1.3%	2
£176 - £200	2.5%	25	3.8%	7	2.2%	3	3.5%	5	7.6%	4	0.0%	0	2.8%	5
£201 - £225	0.3%	3	0.0%	0	2.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£226 - £250	0.8%	8	2.5%	5	1.9%	3	0.0%	0	0.0%	0	0.0%	0	0.6%	1
£251 - £275	0.2%	2	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
£276 - £300	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£301+	0.2%	2	0.0%	0	0.0%	0	0.7%	1	1.5%	1	0.0%	0	0.0%	0
(Don't know / varies)	6.8%	68	4.1%	7	9.5%	13	6.5%	10	7.3%	4	8.5%	25	5.0%	9
(Refused)	1.7%	17	3.3%	6	3.6%	5	0.7%	1	0.0%	0	1.1%	3	1.0%	2
Mean:		*89.33*		*91.57*		*100.28*		*100.50*		*88.50*		*76.27*		*90.60*
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

Q09 When you go main food shopping is your trip linked with any other activity?
Not Internet / delivery at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Yes – NON-FOOD shopping	10.3%	88	16.9%	27	7.2%	8	8.8%	12	7.7%	4	13.5%	33	3.2%	5
Yes – other FOOD shopping	4.8%	41	5.1%	8	0.5%	1	2.1%	3	6.8%	3	8.4%	20	3.6%	6
Yes – visiting services such as banks and other financial institutions	0.6%	5	0.3%	1	0.0%	0	0.0%	0	0.9%	0	1.6%	4	0.0%	0
Yes – leisure activity	2.9%	25	0.9%	1	2.7%	3	1.8%	2	4.0%	2	3.3%	8	5.2%	8
Yes – travelling to/from work	2.5%	21	0.7%	1	0.0%	0	2.4%	3	1.7%	1	3.4%	8	5.3%	8
Yes – travelling to/from school/college/university	0.4%	4	0.7%	1	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Yes – getting petrol	3.6%	30	3.3%	5	2.5%	3	8.4%	11	2.6%	1	2.7%	7	2.0%	3
Yes – visiting café / pub / restaurant	3.3%	28	4.9%	8	4.4%	5	3.6%	5	3.6%	2	2.1%	5	2.4%	4
Yes – visiting family/friends	1.8%	16	0.7%	1	0.0%	0	0.0%	0	1.7%	1	2.9%	7	4.5%	7
Yes – visiting health service such as doctor, dentist, hospital	0.7%	6	0.7%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	3	1.2%	2
Yes – visiting other service such as laundrette, hairdresser, recycling	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Yes – other activity	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(No activity)	66.9%	571	64.4%	103	77.8%	90	70.8%	95	66.0%	33	59.4%	143	69.8%	108
(Don't know / varies)	2.1%	18	1.6%	2	2.6%	3	2.0%	3	4.3%	2	1.4%	3	2.5%	4
Weighted base:		854		160		115		135		50		240		155
Sample:		860		154		112		129		85		230		150

Q10 Where do you do this linked trip?
Non-food, food or services at Q09 AND Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Zone 1														
Aldi, (Thaxted Road), Knight Park, Saffron Walden	0.7%	1	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, Elizabeth Way, Saffron Walden	1.3%	2	4.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Knight Park, Saffron Walden, CB10 2SG	5.0%	7	12.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.3%	2
Saffron Walden town centre	32.5%	43	71.7%	26	20.7%	2	16.3%	2	17.6%	1	19.0%	11	11.3%	1
Tesco Superstore, Radwinter Road, Saffron Walden	0.8%	1	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Hill Street, Saffron Walden	1.5%	2	3.9%	1	7.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2														
Co-op, Church Road, Stansted Mountfitchet	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3														
Co-op, Webb Road, Flitch Green	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Dunmow town centre	4.7%	6	0.0%	0	0.0%	0	39.7%	6	0.0%	0	0.0%	0	6.5%	1
Zone 4														
Royston town centre	2.1%	3	0.0%	0	0.0%	0	0.0%	0	16.1%	1	2.8%	2	0.0%	0
Zone 5														
Aldi, Lordscroft Lane, Haverhill	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0
Cambridge Road Retail Park, Haverhill (B&Q, Halfords, Pets at Homes, Home Bargains)	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	2	0.0%	0
Haverhill town centre	17.2%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	40.0%	23	0.0%	0
Lidl, Ehringshausen Way, Haverhill	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	2	0.0%	0
Sainsbury’s, Haycocks Road, Haverhill	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Sawston village centre	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	2	0.0%	0
Tesco Superstore, Cangle Road, Haverhill	4.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.5%	5	0.0%	0
Zone 6														
Co-op, Brook Street, Great Bardfield	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Outside Survey Area														
A1 Retail Park, London Road, Biggleswade, SG18 8PS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Durham Road, Royston, SG8 5HN	1.1%	1	0.0%	0	0.0%	0	0.0%	0	19.3%	1	0.0%	0	0.0%	0
B&M, Second Avenue, Letchworth, SG6 2HN	0.3%	0	0.0%	0	0.0%	0	0.0%	0	5.9%	0	0.0%	0	0.0%	0
Bishops Stortford town centre	4.4%	6	1.5%	1	49.0%	4	8.2%	1	0.0%	0	0.0%	0	0.0%	0
Braintree town centre	3.4%	4	0.0%	0	0.0%	0	11.2%	2	0.0%	0	0.0%	0	30.7%	3
Bury St Edmunds town centre	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Cambridge city centre	3.1%	4	0.0%	0	0.0%	0	0.0%	0	5.9%	0	6.4%	4	0.0%	0
Chelmsford city centre	3.9%	5	0.0%	0	0.0%	0	24.6%	3	0.0%	0	0.0%	0	17.2%	2
Clock Tower Retail Park, Westway, Chelmsford, CM1 3BH	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.5%	1
Goodlife Park, Stansted Road, Bishop's Stortford, CM23 5PP	0.5%	1	0.0%	0	7.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harlow district centre	0.5%	1	0.0%	0	7.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homelands Retail Park, Cuton Hall Lane, Springfield, Chelmsford (Longacres, Pets Corner, Trade Point, B&Q)	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	2	0.0%	0
Iceland, Histon Road, Arbury, Cambridge, CB4 3JD	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Letchworth Town Centre,	0.3%	0	0.0%	0	0.0%	0	0.0%	0	5.9%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
SG6 3EW														
Marks & Spencer, South Street, Bishops Stortford	0.5%	1	0.0%	0	7.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, York Way, Durham Way, Royston, SG8 5GX	0.6%	1	0.0%	0	0.0%	0	0.0%	0	10.2%	1	0.0%	0	0.0%	0
Newmarket town cente	1.1%	1	0.0%	0	0.0%	0	0.0%	0	19.3%	1	0.0%	0	0.0%	0
Sainsbury's, White Hart Lane, Chelmsford	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.5%	1
Others														
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		132		36		8		14		7		57		9
Sample:		128		35		10		16		10		48		9

Q11 Do you make 'top up' shopping trips in between your main food shopping trip? Top up grocery shopping includes 'basket shops' in foodstores, purchases from speciality retailers such as bakers, butchers and greengrocers, and snacks bought from shops.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Yes	70.6%	708	72.1%	128	80.3%	108	78.0%	120	61.2%	36	67.6%	196	63.7%	119
No	29.4%	294	27.9%	49	19.7%	27	22.0%	34	38.8%	23	32.4%	94	36.3%	68
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

Q12 Where ddo you usually undertake your 'top up' shopping?
Yes at Q11 AND Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Zone 1														
Aldi, (Thaxted Road), Knight Park, Saffron Walden	2.7%	18	10.8%	13	0.0%	0	0.0%	0	0.0%	0	2.0%	4	1.1%	1
B&M, Thaxted Road, Knight Retail Park, Saffron Walden, CB10 2UR	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2
Co-op, Stortford Road, Clavering, Saffron Walden, CB11 4PE	0.2%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costcutter, Church Street, Ickleton, Saffron Walden, CB10 1SL	0.2%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costcutter, High Street, Saffron Walden	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Days Bakery, School Street, Great Chesterford, Saffron Walden, CB10 1NP	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local market, Saffron Walden Town Centre, CB10 1HD	1.0%	6	4.5%	5	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Local shops, Newport Village Centre, CB11 3QY	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Saffron Walden Town Centre, CB10 1HD	1.2%	8	4.4%	5	0.0%	0	0.0%	0	2.5%	1	0.3%	1	1.0%	1
Local shops, Widdington Village Centre, CB11 3SG	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nisa Local, Stortford Road, Clavering, Saffron Walden, CB11 4PE	0.2%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nisa, Cromwell Road, Saffron Walden	1.6%	11	7.5%	9	0.0%	0	0.0%	0	0.0%	0	0.9%	2	0.0%	0
Nisa, High Street, Newport, Saffron Walden, CB11 3QY	0.3%	2	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Old Mill Road, Mini Market, Old Mill Road, Saffron Walden, CB11 3ER	0.2%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Pleasant Valley, Saffron Walden	3.8%	25	17.6%	21	0.0%	0	0.0%	0	0.0%	0	2.1%	4	0.0%	0
Tesco Superstore, Radwinter Road, Saffron Walden	3.9%	25	16.9%	20	0.0%	0	1.0%	1	0.0%	0	0.6%	1	2.6%	3
Waitrose, Hill Street, Saffron Walden	6.0%	40	19.9%	24	2.4%	2	0.5%	1	2.5%	1	6.5%	12	0.0%	0
Zone 2														
Clifford's Country Grocers and Farm Shop, Pledgdon Hall Cottages, Henham, CM22 6BJ	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Church Road, Stansted Mountfitchet	3.4%	23	0.8%	1	20.5%	20	1.7%	2	0.0%	0	0.0%	0	0.0%	0
Co-op, The Heath, Hatfield Heath, Bishop's Stortford, CM22 7EB	0.4%	3	0.0%	0	1.3%	1	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Dorringtons, Cambridge Road, Stansted, CM24 8BZ	0.5%	3	0.0%	0	3.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Hatfield Broad Oak Village Centre, CM22 7HJ	0.6%	4	0.0%	0	3.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Sheering Village Centre, CM22 7ND	0.3%	2	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Londis, Cambridge Road, Stansted Mountfitchet, CM24 8DB	0.2%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Steve Golding, Chapel Hill, Stansted Mountfitchet, CM24 8AG	0.2%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Ambrose Corner, Elsenham,	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Bishop's Stortford, CM22 6EH														
Tesco Express, Cambridge Road, Stansted Mountfitchet	3.9%	26	2.9%	3	23.4%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3														
A J Coulson, High Street, Great Dunmow, Dunmow, CM6 1AE	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Budgens, The Post Office, Station Road, Felsted, CM6 3DG	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Webb Road, Flitch Green	1.4%	9	0.0%	0	0.0%	0	8.4%	9	0.0%	0	0.0%	0	0.0%	0
Co-op, White Street, Great Dunmow	4.3%	28	0.0%	0	0.0%	0	21.9%	25	0.0%	0	1.1%	2	1.5%	2
Country Shop, Dunmow Road, Leaden Roding, Dunmow, CM6 1QB	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Dorringtons, High Street, Great Dunmow, CM6 1AB	0.2%	2	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Guildhall Stores, Town Street, Thaxted, Dunmow, CM6 2LA	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Linsell's of Felsted, Station Road, Felsted, CM6 3DG	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Local market, Great Dunmow Town Centre, CM6 1DG	0.3%	2	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0
Local shops, Felsted Village Centre, CM6 3DJ	0.5%	3	0.0%	0	0.0%	0	3.1%	3	0.0%	0	0.0%	0	0.0%	0
Local shops, Great Dunmow Town Centre, CM6 1DG	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Stebbing Village Centre, CM6 3SQ	0.2%	2	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Local shops, Thaxted Town Centre, CM6 2PL	0.5%	3	0.0%	0	0.0%	0	2.6%	3	0.0%	0	0.0%	0	0.6%	1
Nisa Local, Town Street, Thaxted, Dunmow, CM6 2LA	0.4%	3	0.0%	0	0.0%	0	2.4%	3	0.0%	0	0.0%	0	0.0%	0
Priors Hall Farm, Lindsell, Great Dunmow, CM6 3QR	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Sweetlands, Stortford Road, Freat Dunmow, CM6 1DA	0.2%	2	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Priors Green Local Centre, Bennet Canfield, Dunmow, CM6 1YE	1.9%	13	0.0%	0	8.3%	8	4.3%	5	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Stortford Road, Great Dunmow	6.6%	43	0.0%	0	4.6%	4	33.7%	38	0.0%	0	0.0%	0	1.1%	1
Zone 4														
Barley Stores and Post Office, Church End, Barley, Royston, SG8 8JW	0.5%	3	0.0%	0	0.0%	0	0.0%	0	8.6%	3	0.0%	0	0.0%	0
Dhesi Mini Market, Icknield Walk, Royston, SG8 7JX	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0
Icknield Stores, Icknield Walk, Royston, SG8 7JX	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0
Local market, Royston Town Centre, SG8 7XB	0.2%	1	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0
Local shops, Barley Village Centre, SG8 8JW	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0
Local shops, Royston Town Centre, SG8 7XB	0.9%	6	0.0%	0	0.0%	0	0.0%	0	12.9%	4	0.9%	2	0.0%	0
Local shops, Thriplow Village Centre, SG8 7RD	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0
Londis, Doggetts Barn, Church End, Barley, Royston, SG8 8JW	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0
McColl's, Queens Road, Royston, SG8 7AP	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0
Thriplow Village Shop, Middle Street, Thriplow, Royston, SG8 7RD	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Zone 5														
Aldi, Lordscroft Lane, Haverhill	2.2%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.8%	15	0.0%	0
Balsham Post Office, High Street, Balsham, Cambridge, CB21 4DJ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Budgens, Sturmer Road, Haverhill, CB9 7UU	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	2	0.0%	0
Co-op, High Street, Linton	1.2%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	8	0.0%	0
Co-op, High Street, Sawston	3.5%	23	1.2%	1	0.0%	0	0.0%	0	0.0%	0	11.5%	22	0.0%	0
Home Bargains, Ehringshausen Way, Haverhill, CB9 8QJ	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0
Iceland, High Street, Haverhill	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	5	0.0%	0
Jamie's Meat, High Street, Haverhill, CB9 8AR	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
JET, Manor Road, Haverhill, CB9 0EP	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Kedington Butchers, The Parade, Kedington, CB9 7PR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Lidl, Ehringshausen Way, Haverhill	1.3%	9	0.8%	1	0.0%	0	0.0%	0	0.0%	0	4.2%	8	0.0%	0
Local market, Haverhill Town Centre, CB9 8AD	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Local shops, Balsham Village Center, CB21 4DJ	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Local shops, Haverhill Town Centre, CB9 8AD	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	0.0%	0
Local shops, Kedington Village Centre, CB9 8QG	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	2	0.0%	0
Local shops, Sawston Village Centre, CB22 3BG	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	4	0.0%	0
Local shops, Steeple Bumpstead Village Centre, CB9 7DG	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0
Marks & Spencer, BP, Whittlesford, Bridge, Cambridge, CB22 3HD	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	2	0.0%	0
Nisa Local, High Street, Abington, Cambridge, CB21 6AB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Premier, Queen Street, Haverhill, CB9 9DZ	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	4	0.0%	0
Sainsbury's, Haycocks Road, Haverhill	3.5%	23	0.4%	1	0.0%	0	0.0%	0	0.0%	0	12.1%	23	0.0%	0
Tesco Superstore, Cangle Road, Haverhill	4.9%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.4%	33	0.0%	0
Zone 6														
Co-op, Brook Street, Great Bardfield	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	5
Co-op, Church Street, Bocking, Braintree	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Finchingfield Post Office and Stores, Bardfield Road, Finchingfield, CM7 4LS	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gemco News, Queens Road, Braintree, CM7 5UA	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Great Leighs Post Office, Main Road, Great Leighs, Chelmsford, CM3 1NN	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Local shops, Great Waltham Village Centre, CM3 1DF	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Local shops, Rayne Village Centre, CM77 6RQ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Local shops, Wethersfield Village Centre, CM7 4BY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Morrisons, Dickens Place, Copperfield Road, Chelmsford	1.8%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.6%	12
Nisa Local, Woodhall Parade, Woodhall Road,	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Chelmsford, CM1 4BA														
One Stop, Coldnailhurst Avenue, Braintree, CM7 5PZ	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	3
Tesco Express, Broomfield Road, Chelmsford, CM1 4DP	1.5%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.7%	10
Walthambury Stores, Barrack Lane, Great Waltham, Chelmsford, CM3 1ET	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2
Outside Survey Area														
Aldi, Clock Tower Retail Park, Westway, Chelmsford, CM1 3FJ	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Aldi, Durham Road, Royston	0.2%	1	0.0%	0	0.0%	0	0.0%	0	3.7%	1	0.0%	0	0.0%	0
Aldi, First Avenue, Harlow, CM20 3FA	0.3%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, London Road, Bishop's Stortford	0.8%	5	0.0%	0	5.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Newmarket Road, Cambridge, CB5 8JL	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Aldi, Parkway, Chelmsford, CM2 7FS	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	3
Aldi, Springfield Road, Springfield, Chelmsford	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2
Asda, Monkswood Way, Stevenage, SG1 1LA	0.2%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Watergardens, Harlow	0.2%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Beaumont's Butchers, Bank Street, Braintree, CM7 1UR	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
C Humphrey & Sons, Blixes Farm, Rank's Green, Chelmsford, CM3 2BH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Co-op, Adkins Corner, Cambridge, CB1 3RU	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	2	0.0%	0
Co-op, Bridge Street, Writtle, Chelmsford, CM1 3EY	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2
Co-op, High Street, Great Shelford, Cambridge, CB22 5EH	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	3	0.0%	0
Co-op, Kings Road, Chelmsford, CM1 2BB	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Co-op, Main Road, Chelmsford, CM3 4NQ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Co-op, Ness Road, Burwell, Cambridge, CB25 0AA	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Fieldgate Nurseries, Station Road, Meldreth, Royston, SG8 6JP	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0
Iceland, Bank Street, Braintree	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2
Leech & Sons, Station Road, Melbourn, Royston, SG8 6DU	0.2%	1	0.0%	0	0.0%	0	0.0%	0	3.7%	1	0.0%	0	0.0%	0
Lidl, Jubilee Road, Letchworth Garden City, SG6 1WG	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0
Lidl, Rayne Road, Braintree	1.2%	8	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	6.0%	7
Little Waitrose as Shell, South Road, Bishop's Stortford, CM23 3LA	0.3%	2	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local market, Bishops Stortford Town Centre, CM23 3XH	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local market, Chelmsford City Centre, CM1 1GN	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Local shops, Bishops Stortford Town Centre, CM23 3XH	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Braintree Town Centre, CM7 1RB	0.3%	2	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	1.1%	1

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Local shops, Melbourn Village Centre, SG8 6DB	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0
Local shops, Whittlesford Village Centre, CB33 4NE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Marks & Spencer Simply Food, Braintree Retail Park, Braintree	0.9%	6	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	4.7%	5
Marks & Spencer Simply Food, Roxwell Road, Writtle, Chelmsford, CM1 3RU	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, BP, Notley Cross, Great Notley, Braintree, CM77 7AB	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Durham Way, Royston	0.6%	4	0.0%	0	0.0%	0	0.0%	0	9.2%	3	0.3%	1	0.0%	0
Marks & Spencer, Sidney Street, Cambridge, CB2 3HH	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0
Marks & Spencer, South Street, Bishops Stortford	0.6%	4	1.3%	2	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Westway, Clock Tower Retail Park, Chelmsford, CM1 3FJ	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2
Morrisons, Baldock Street, Royston	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0
Morrisons, Braintree Road, Witham, CM8 2GD	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Morrisons, Needingworth Road, St Ives, PE27 4NB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0
Royston Food Centre, High Street, Royston, SG8 9YY	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0
Sainsbury’s, Brooks Road, Cambridge	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Sainsbury’s, Jackson Square, Bishops Stortford	0.4%	3	0.0%	0	2.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s, The Thorley Centre, Bishops Stortford	0.3%	2	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Sainsbury’s, Tofts Walk, Braintree	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	4
Sainsbury’s, White Hart Lane, Chelmsford	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Sainsbury's Local, High Street, Buntingford, SG9 9AE	0.3%	2	0.0%	0	0.0%	0	0.0%	0	6.5%	2	0.0%	0	0.0%	0
Sainsbury's Superstore, Eddington Avenue, Cambridge, CB3 1SE	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Sidney Street, Cambridge, CB2 3HX	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Savers, High Street, Royston, SG8 9AW	0.2%	1	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0
Stonefields Farm Shop, Kelvedon Road, Colchester, CO5 9SH	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Woollards Lane, Great Shelford, Cambridge, CB22 5EY	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Tesco Extra, Old North Road, Royston	0.9%	6	0.0%	0	0.0%	0	0.0%	0	17.8%	6	0.0%	0	0.0%	0
Tesco Superstore, Bishops Park Centre, Lancaster Way, Bishops Stortford	0.7%	4	0.0%	0	4.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Cambridge Road Industrial Estate, Cambridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Tesco Superstore, East Road / Edinburgh Way, Harlow	0.5%	3	0.0%	0	3.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Great Notley, Braintree	3.2%	21	0.9%	1	0.0%	0	1.9%	2	0.0%	0	0.0%	0	16.2%	18
Tesco Superstore, Market Place, Braintree	0.3%	2	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	1.0%	1

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Tesco Superstore, Marks Farm, Braintree	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	4
Tesco Superstore, Yarrow Road, Fulbourn, Cambridge	0.8%	5	0.9%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	4	0.0%	0
Waitrose, Hauxton Road, Trumpington, Cambridge	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	2	0.0%	0
Waitrose, Northgate End, Bishops Stortford	0.3%	2	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Others														
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		661		120		96		112		35		187		111
Sample:		643		113		88		103		62		172		105

Mean score [Times a month]:

Q13 How often do you make 'top up' shopping trips to …. (STORE MENTIONED AT Q12)?
Yes at Q11

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Daily	3.2%	23	0.0%	0	6.2%	7	5.7%	7	7.5%	3	1.5%	3	3.2%	4
At least two times a week	32.0%	226	33.9%	43	32.9%	36	35.9%	43	16.9%	6	32.9%	65	28.2%	34
At least once a week	48.4%	342	51.3%	66	48.8%	53	40.2%	48	51.0%	18	50.0%	98	49.7%	59
At least once a fortnight	9.8%	69	12.0%	15	7.5%	8	8.2%	10	11.6%	4	10.4%	20	9.8%	12
At least once a month	3.4%	24	1.5%	2	2.3%	3	5.8%	7	10.7%	4	2.9%	6	2.6%	3
At least every two months	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less often	0.3%	2	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0
Have only visited once	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.8%	20	0.8%	1	2.3%	3	2.7%	3	2.4%	1	2.4%	5	6.6%	8
Mean:		*5.80*		*5.07*		*6.64*		*6.47*		*5.96*		*5.40*		*5.75*
Weighted base:		708		128		108		120		36		196		119
Sample:		689		121		100		111		64		181		112

Mean score [£]:

Q14 Thinking more generally, how much does your household spend on average on 'top up' food and grocery shopping in a week? Once again, top up grocery shopping includes 'basket shops' in foodstores, purchases from speciality retailers such as bakers, butchers and greengrocers, and snacks bought from shops.
Yes at Q11

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
£1 - £5	10.0%	71	13.9%	18	9.7%	11	8.1%	10	15.5%	6	9.9%	19	6.4%	8
£6 - £10	20.5%	145	19.3%	25	19.0%	21	13.4%	16	13.9%	5	26.3%	52	22.8%	27
£11 - £15	11.4%	80	5.3%	7	13.9%	15	13.3%	16	10.4%	4	11.2%	22	14.1%	17
£16 - £20	16.4%	116	19.9%	25	15.4%	17	13.6%	16	16.9%	6	17.8%	35	14.2%	17
£21 - £25	9.6%	68	8.1%	10	9.0%	10	9.7%	12	12.1%	4	9.1%	18	11.9%	14
£26 - £30	11.1%	78	14.4%	18	8.1%	9	18.3%	22	8.0%	3	6.7%	13	11.0%	13
£31 - £35	1.7%	12	1.9%	2	0.0%	0	1.9%	2	1.2%	0	2.3%	4	1.7%	2
£36 - £40	3.6%	26	2.5%	3	3.3%	4	5.8%	7	4.4%	2	3.5%	7	3.0%	4
£41 - £45	1.3%	9	2.2%	3	2.2%	2	0.0%	0	0.0%	0	1.2%	2	1.4%	2
£46 - £50	3.5%	25	3.9%	5	2.6%	3	8.0%	10	4.4%	2	0.8%	2	3.4%	4
£51 - £60	1.7%	12	2.1%	3	1.0%	1	2.3%	3	0.0%	0	0.8%	2	3.1%	4
£61 - £70	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£71 - £80	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
£81 - £90	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
£91 - £100	0.4%	3	0.0%	0	1.2%	1	1.0%	1	1.2%	0	0.0%	0	0.0%	0
£101 - £110	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£111 - £120	0.4%	3	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.5%	1
£121 - £130	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£131 - £140	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£141 - £150	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£151 - £175	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£176 - £200	0.2%	1	0.0%	0	0.0%	0	0.0%	0	3.9%	1	0.0%	0	0.0%	0
£201 - £225	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£226 - £250	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£251 - £275	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£276 - £300	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£301+	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	6.6%	47	3.3%	4	12.0%	13	4.2%	5	6.8%	2	7.1%	14	6.6%	8
(Refused)	1.3%	9	1.9%	2	2.7%	3	0.5%	1	1.2%	0	1.4%	3	0.0%	0
Mean:		*21.54*		*21.63*		*20.19*		*24.53*		*27.94*		*19.17*		*21.44*
Weighted base:		708		128		108		120		36		196		119
Sample:		689		121		100		111		64		181		112

Mean score [Times a week]: Daily = 7, 4-6 days a week = 5, 2-3 days a week = 2.5, One day a week = 1, Every two weeks = 0.5, Every three weeks = 0.333, Monthly = 0.25, Once every two months = 0.125, Three-four times a year = 0.071, Twice a year = 0.042, Once a year = 0.021, Less often = 0.014, Never = 0

LOCK1 Before the Covid-19 lockdowns, how often did undertake your main food shop online?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Daily	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
4-6 days a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-3 days a week	0.8%	8	1.9%	3	0.0%	0	1.5%	2	1.5%	1	0.4%	1	0.3%	1
One day a week	11.8%	118	9.4%	17	15.9%	21	12.9%	20	12.4%	7	10.9%	32	11.4%	21
Every two weeks	4.1%	41	2.2%	4	7.9%	11	3.4%	5	1.5%	1	5.3%	15	2.9%	5
Every three weeks	0.2%	2	0.0%	0	0.0%	0	1.0%	2	0.7%	0	0.0%	0	0.0%	0
Monthly	4.1%	41	5.2%	9	4.7%	6	3.3%	5	2.5%	1	2.9%	8	5.7%	11
Once every two months	1.2%	12	1.3%	2	2.5%	3	0.0%	0	1.3%	1	1.8%	5	0.0%	0
Three-four times a year	1.8%	18	2.3%	4	2.0%	3	2.7%	4	0.7%	0	0.8%	2	2.5%	5
Twice a year	2.8%	28	3.2%	6	1.3%	2	5.7%	9	2.0%	1	1.5%	4	3.4%	6
Once a year	0.5%	5	1.3%	2	0.0%	0	0.0%	0	1.3%	1	0.4%	1	0.7%	1
Less often	2.5%	25	3.2%	6	4.6%	6	2.0%	3	1.3%	1	3.1%	9	0.0%	0
Never	69.0%	691	70.1%	124	60.6%	82	66.2%	102	71.9%	42	71.4%	207	71.3%	134
(Don't know)	0.6%	6	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.4%	1	1.6%	3
(Varies)	0.6%	6	0.0%	0	0.5%	1	1.2%	2	0.7%	0	0.7%	2	0.3%	1
Mean:		*0.19*		*0.17*		*0.22*		*0.20*		*0.19*		*0.19*		*0.16*
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

Mean score [Times a week]: Daily = 7, 4-6 days a week = 5, 2-3 days a week = 2.5, One day a week = 1, Every two weeks = 0.5, Every three weeks = 0.333, Monthly = 0.25, Once every two months = 0.125, Three-four times a year = 0.071, Twice a year = 0.042, Once a year = 0.021, Less often = 0.014, Never = 0

LOCK2 During the Covid-19 lockdowns, how often did you undertake your main food shop online?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Daily	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
4-6 days a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-3 days a week	2.0%	20	3.7%	7	1.2%	2	3.3%	5	2.2%	1	0.7%	2	1.7%	3
One day a week	25.9%	259	24.1%	43	26.7%	36	23.5%	36	26.7%	16	27.2%	79	26.7%	50
Every two weeks	6.8%	68	3.6%	6	7.7%	10	9.2%	14	2.7%	2	8.1%	24	6.4%	12
Every three weeks	0.4%	4	0.0%	0	1.5%	2	0.7%	1	0.7%	0	0.0%	0	0.3%	1
Monthly	4.1%	41	6.0%	11	3.7%	5	4.7%	7	1.5%	1	1.8%	5	6.6%	12
Once every two months	0.6%	6	1.1%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	3	0.3%	1
Three-four times a year	2.1%	21	1.6%	3	5.4%	7	1.7%	3	2.0%	1	1.2%	3	1.9%	3
Twice a year	1.9%	19	1.3%	2	0.0%	0	6.7%	10	0.0%	0	0.9%	3	1.9%	3
Once a year	0.3%	3	1.6%	3	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less often	1.1%	11	2.4%	4	2.6%	4	0.4%	1	0.0%	0	0.9%	3	0.3%	1
Never	53.6%	537	54.6%	97	50.3%	68	49.6%	76	60.6%	35	55.8%	162	52.9%	99
(Don't know)	0.3%	3	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.4%	1	0.3%	1
(Varies)	0.7%	7	0.0%	0	0.5%	1	0.0%	0	1.3%	1	1.4%	4	0.7%	1
Mean:		*0.37*		*0.37*		*0.36*		*0.38*		*0.36*		*0.37*		*0.37*
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

Mean score: More = 1, Same = 0, Less = -1

QA Online grocery shopping DURING lockdowns compared to BEFORE lockdowns:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
More	28.3%	284	29.4%	52	25.8%	35	32.0%	49	21.4%	13	26.8%	78	30.5%	57
Same	62.4%	626	64.4%	114	61.8%	83	58.9%	91	66.7%	39	63.8%	185	60.5%	114
Less	7.8%	78	6.2%	11	11.8%	16	7.9%	12	7.4%	4	7.6%	22	6.8%	13
(Don't know / varies)	1.4%	14	0.0%	0	0.5%	1	1.2%	2	4.4%	3	1.8%	5	2.2%	4
Mean:		*0.21*		*0.23*		*0.14*		*0.24*		*0.15*		*0.20*		*0.24*
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

Mean score [Times a week]: Daily = 7, 4-6 days a week = 5, 2-3 days a week = 2.5, One day a week = 1, Every two weeks = 0.5, Every three weeks = 0.333, Monthly = 0.25, Once every two months = 0.125, Three-four times a year = 0.071, Twice a year = 0.042, Once a year = 0.021, Less often = 0.014, Never = 0

LOCK3 After the Covid-19 lockdowns have completely ceased, how often will you carry out your main food shop online?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Daily	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
4-6 days a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-3 days a week	1.0%	10	1.9%	3	0.0%	0	0.7%	1	2.2%	1	0.9%	3	0.7%	1
One day a week	15.2%	152	7.6%	13	15.6%	21	14.2%	22	16.0%	9	15.5%	45	22.0%	41
Every two weeks	6.4%	64	7.6%	13	6.6%	9	7.1%	11	4.2%	2	5.3%	15	7.0%	13
Every three weeks	0.4%	4	0.0%	0	1.5%	2	0.4%	1	1.5%	1	0.2%	1	0.0%	0
Monthly	6.1%	61	6.4%	11	7.4%	10	7.3%	11	2.0%	1	5.5%	16	6.2%	12
Once every two months	1.7%	17	1.5%	3	2.8%	4	1.4%	2	1.3%	1	2.4%	7	0.7%	1
Three-four times a year	2.0%	20	1.5%	3	2.8%	4	1.6%	3	0.0%	0	1.5%	4	3.5%	7
Twice a year	2.1%	21	0.5%	1	3.0%	4	4.6%	7	1.3%	1	1.8%	5	1.5%	3
Once a year	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less often	1.9%	19	2.2%	4	3.1%	4	1.9%	3	0.0%	0	1.4%	4	2.3%	4
Never	60.0%	601	67.1%	119	55.7%	75	58.6%	90	65.4%	38	60.8%	177	54.6%	102
(Don’t know)	1.8%	18	2.1%	4	0.9%	1	2.1%	3	5.6%	3	1.5%	4	1.3%	2
(Varies)	1.1%	11	0.8%	1	0.5%	1	0.0%	0	0.7%	0	2.6%	8	0.3%	1
Mean:		*0.25*		*0.19*		*0.23*		*0.23*		*0.26*		*0.27*		*0.30*
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

Mean score: More = 1, Same = 0, Less = -1

QB Online grocery shopping AFTER lockdowns compared to DURING lockdowns:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
More	6.3%	63	4.8%	9	7.1%	10	7.0%	11	4.0%	2	4.8%	14	9.6%	18
Same	69.8%	700	63.1%	112	68.8%	93	66.9%	103	74.1%	43	74.2%	215	71.3%	134
Less	20.5%	205	29.2%	52	22.7%	31	24.0%	37	14.4%	8	15.8%	46	17.1%	32
(Don't know / varies)	3.4%	34	2.9%	5	1.4%	2	2.1%	3	7.6%	4	5.3%	15	2.0%	4
Mean:		*-0.15*		*-0.25*		*-0.16*		*-0.17*		*-0.11*		*-0.12*		*-0.08*
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

Mean score: More = 1, Same = 0, Less = -1

QC Online grocery shopping AFTER lockdowns compared to BEFORE lockdowns:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
More	16.6%	167	12.8%	23	15.1%	20	16.5%	25	16.2%	9	14.3%	41	25.2%	47
Same	71.8%	719	73.4%	130	70.9%	96	70.7%	109	68.7%	40	74.9%	218	67.8%	127
Less	8.2%	82	10.8%	19	12.6%	17	9.5%	15	8.9%	5	6.2%	18	4.1%	8
(Don't know / varies)	3.4%	35	2.9%	5	1.4%	2	3.3%	5	6.3%	4	4.6%	13	2.9%	5
Mean:		*0.09*		*0.02*		*0.03*		*0.07*		*0.08*		*0.09*		*0.22*
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

Q15 Where do you usually buy clothing or footwear goods?
Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Zone 1														
Aldi, (Thaxted Road), Knight Park, Saffron Walden	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Saffron Walden town centre	5.1%	29	16.3%	14	7.1%	6	0.0%	0	1.1%	0	4.8%	8	0.9%	1
Zone 2														
Co-op, Church Road, Stansted Mountfitchet	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stansted Airport, Bassingbourn Road, Stansted, CM24 1QW	0.2%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Cambridge Road, Stansted Mountfitchet	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3														
Co-op, Webb Road, Flitch Green	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Dunmow town centre	0.4%	2	0.0%	0	1.3%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Stortford Road, Great Dunmow	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Zone 4														
Royston town centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	6.4%	2	0.0%	0	0.0%	0
Zone 5														
Aldi, Lordscroft Lane, Haverhill	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haverhill town centre	3.1%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.9%	18	0.0%	0
Sainsbury’s, Haycocks Road, Haverhill	1.8%	10	0.6%	1	0.0%	0	0.0%	0	0.0%	0	5.9%	10	0.0%	0
Sawston village centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Tesco Superstore, Cangle Road, Haverhill	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0
Zone 6														
Co-op, Brook Street, Great Bardfield	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Outside Survey Area														
A1 Retail Park, London Road, Biggleswade, SG18 8PS	0.2%	1	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0
Beehive Centre Retail Park, Cambridge (Asda, Go Outdoors, Next Home, TK Maxx)	0.8%	5	2.8%	2	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0
Biggleswade Town Centre, SG18 8AQ	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0
Bishops Stortford town centre	7.5%	44	6.0%	5	37.9%	31	4.8%	4	0.0%	0	2.0%	3	0.0%	0
Bluewater Shopping Centre, Greenhithe (Apple, Boots, Clarks, Costa, Superdry)	0.3%	2	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0
Braintree town centre	1.5%	9	2.0%	2	0.0%	0	2.3%	2	0.0%	0	0.0%	0	4.1%	5
Braintree Village (Freeport Outlet), Charter Way, Braintree (Armani, Calvin Klein, Clarks, Costa, M&S Outlet)	12.2%	70	7.5%	7	8.6%	7	20.9%	20	0.0%	0	4.1%	7	26.5%	31
Bristol City Centre, BS1 6EU	0.2%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bury St Edmunds town centre	3.8%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.6%	22	0.0%	0
Cambridge city centre	30.0%	174	51.8%	45	11.6%	9	9.3%	9	57.7%	22	51.6%	84	3.7%	4
Cambridge Retail Park, Cambridge (Nando's, Boots, Homebase, Starbucks)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0
Central London / West End	1.5%	9	1.2%	1	5.0%	4	0.6%	1	0.0%	0	1.2%	2	1.1%	1
Chelmer Village Retail Park, Chelmsford (Currys PC World, Next & Next Home, Boots, JD Sport, TK Maxx)	1.2%	7	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	4.5%	5
Chelmsford city centre	17.4%	101	0.0%	0	1.3%	1	40.5%	38	0.0%	0	0.0%	0	53.4%	62

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Colchester town centre	0.6%	4	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2
Dobbies Garden Centre, Dunsbridge Turnpike, Royston	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0
Great Yarmouth Town Centre, NR30 3LJ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Harlow district centre	3.5%	20	3.2%	3	14.6%	12	6.0%	6	0.0%	0	0.0%	0	0.0%	0
Harlow Retail Park, Harlow (Argos, Dunelm, Homebase)	0.7%	4	2.0%	2	0.8%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0
John Lewis, Grand Arcade, Cambridge	0.3%	2	0.6%	1	0.0%	0	0.0%	0	3.1%	1	0.0%	0	0.0%	0
Lakeside Retail Park, West Thurrock (Argos, B&M, Currys PC World, The Range)	1.3%	7	1.8%	2	2.1%	2	2.7%	3	0.0%	0	0.0%	0	1.4%	2
Letchworth Town Centre, SG6 3EW	0.6%	3	0.0%	0	0.0%	0	0.0%	0	8.7%	3	0.0%	0	0.0%	0
Marks & Spencer, Brookfield Centre, Halfhide Lane, Cheshunt, Waltham Cross, EN8 0TZ	0.4%	2	0.0%	0	1.3%	1	0.0%	0	3.4%	1	0.0%	0	0.0%	0
Marks & Spencer, South Street, Bishops Stortford	0.7%	4	0.6%	1	3.1%	3	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Newmarket town cente	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.4%	1	0.0%	0
Norwich City Centre, NR1 3DD	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Rivermead Industrial Estate, Chelmsford, CM1 1PD	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Riverside Retail Park, Chelmsford (Decathlon, Sports Direct, Smyths Toys, Matalan, McDonald’s)	0.4%	2	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s, Fifth Avenue, Harlow	0.2%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s, Jackson Square, Bishops Stortford	0.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s, White Hart Lane, Chelmsford	0.2%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.5%	1
Stevenage town centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	4.5%	2	0.0%	0	0.0%	0
Tesco Extra, Old North Road, Royston	0.5%	3	0.0%	0	0.0%	0	0.0%	0	7.3%	3	0.0%	0	0.0%	0
Tesco Superstore, Springfield Road, Chelmsford	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2
Tesco Superstore, Yarrow Road, Fulbourn, Cambridge	0.3%	2	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.7%	1	0.0%	0
TK Maxx, The Water Gardens, Haydens Road, Harlow, CM20 1AR	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Others														
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		579		87		81		93		38		164		116
Sample:		603		89		81		91		66		165		111

Q16 Where do you usually buy books, CDs, DVDs?
Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Zone 1														
Aldi, (Thaxted Road), Knight Park, Saffron Walden	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Saffron Walden town centre	22.2%	53	76.9%	30	18.3%	5	8.3%	3	11.5%	1	16.7%	12	0.0%	0
Tesco Superstore, Radwinter Road, Saffron Walden	0.4%	1	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2														
Co-op, Church Road, Stansted Mountfitchet	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3														
Co-op, Webb Road, Flitch Green	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Dunmow town centre	1.9%	5	0.0%	0	0.0%	0	11.1%	5	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Stortford Road, Great Dunmow	1.5%	3	0.0%	0	0.0%	0	8.3%	3	0.0%	0	0.0%	0	0.0%	0
Zone 4														
Royston town centre	0.8%	2	0.0%	0	0.0%	0	0.0%	0	18.2%	2	0.0%	0	0.0%	0
Zone 5														
Aldi, Lordscroft Lane, Haverhill	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haverhill town centre	8.4%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	27.4%	20	0.0%	0
Sainsbury’s, Haycocks Road, Haverhill	1.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	5	0.0%	0
Sawston village centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Tesco Superstore, Cangle Road, Haverhill	1.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	4	0.0%	0
Zone 6														
Co-op, Brook Street, Great Bardfield	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Outside Survey Area														
A1 Retail Park, London Road, Biggleswade, SG18 8PS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bishops Park Centre, Lancaster Way, Bishop's Stortford, CM23 4DA	0.3%	1	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bishops Stortford town centre	12.8%	30	0.0%	0	79.6%	24	10.7%	4	0.0%	0	0.0%	0	4.8%	2
Braintree town centre	3.8%	9	0.0%	0	0.0%	0	6.5%	3	0.0%	0	0.0%	0	15.0%	6
Bury St Edmunds town centre	2.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	5	0.0%	0
Cambridge city centre	14.9%	35	13.4%	5	0.0%	0	12.5%	5	19.2%	2	31.3%	23	0.0%	0
Central London / West End	1.5%	4	0.0%	0	0.0%	0	5.9%	2	0.0%	0	0.0%	0	2.5%	1
Chelmsford city centre	18.0%	43	0.0%	0	0.0%	0	33.0%	14	0.0%	0	0.0%	0	68.5%	29
Colchester town centre	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	2
Ely City Centre, CB7 4DL	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Great Baddow Village Centre, CM2 7DW	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1
Great Yarmouth Town Centre, NR30 3LJ	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Harlow Retail Park, Harlow (Argos, Dunelm, Homebase)	0.7%	2	4.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lakeside Retail Park, West Thurrock (Argos, B&M, Currys PC World, The Range)	1.1%	3	2.7%	1	0.0%	0	3.7%	2	0.0%	0	0.0%	0	0.0%	0
Letchworth Town Centre, SG6 3EW	0.2%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	0	0.0%	0	0.0%	0
Linton Village Centre, CB21 4HS	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Stevenage town centre	0.2%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	0	0.0%	0	0.0%	0
Tesco Extra, Fordham Road, Newmarket, CB8 7AH	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Tesco Extra, Old North Road, Royston	1.8%	4	0.0%	0	0.0%	0	0.0%	0	39.5%	4	0.0%	0	0.0%	0
Tesco Superstore, Princes Road, Chelmsford	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Tesco Superstore, Yarrow Road, Fulbourn,	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Cambridge														
Waltham Cross Town Centre, EN8 7AL	0.2%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	0	0.0%	0	0.0%	0
Others														
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		237		39		30		42		11		73		42
Sample:		250		42		27		42		22		74		43

Q17 Where do you usually buy small household goods such as home furnishings, jewellery, glass and china items?
Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Zone 1														
Aldi, (Thaxted Road), Knight Park, Saffron Walden	0.4%	2	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, Elizabeth Way, Saffron Walden	0.6%	3	3.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Knight Park, Saffron Walden, CB10 2SG	1.1%	5	6.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Saffron Walden town centre	6.3%	30	19.7%	16	2.1%	1	0.7%	1	2.2%	1	6.9%	10	1.3%	1
Tesco Superstore, Radwinter Road, Saffron Walden	0.8%	4	3.2%	3	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2														
Co-op, Church Road, Stansted Mountfitchet	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3														
Co-op, Webb Road, Flitch Green	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Dunmow town centre	0.4%	2	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Stortford Road, Great Dunmow	0.3%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Zone 4														
Royston town centre	1.2%	6	0.0%	0	0.0%	0	0.0%	0	16.1%	5	0.4%	1	0.0%	0
Zone 5														
Aldi, Lordscroft Lane, Haverhill	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Argos in Sainsbury's, Haycocks Road, Haverhill, CB9 7YL	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0
Cambridge Road Retail Park, Haverhill (B&Q, Halfords, Pets at Homes, Home Bargains)	0.3%	1	0.0%	0	0.0%	0	0.0%	0	4.2%	1	0.0%	0	0.0%	0
Haverhill town centre	4.7%	22	1.7%	1	0.0%	0	0.0%	0	0.0%	0	13.8%	21	0.0%	0
Sainsbury’s, Haycocks Road, Haverhill	2.1%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	10	0.0%	0
Sawston village centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0
Tesco Superstore, Cangle Road, Haverhill	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	3	0.0%	0
Zone 6														
Co-op, Brook Street, Great Bardfield	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Outside Survey Area														
A1 Retail Park, London Road, Biggleswade, SG18 8PS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Turner Rise, Colchester, CO4 5TU	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Asda, Watergardens, Harlow	0.4%	2	0.0%	0	3.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Beehive Centre Retail Park, Cambridge (Asda, Go Outdoors, Next Home, TK Maxx)	3.6%	17	8.8%	7	0.0%	0	0.0%	0	4.8%	2	5.6%	9	0.0%	0
Bishops Stortford town centre	2.1%	10	2.4%	2	10.1%	5	3.7%	3	0.0%	0	0.0%	0	0.0%	0
Bluewater Shopping Centre, Greenhithe (Apple, Boots, Clarks, Costa, Superdry)	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2
Braintree town centre	1.9%	9	0.0%	0	0.0%	0	3.2%	2	0.0%	0	0.0%	0	7.8%	6
Braintree Village (Freeport Outlet), Charter Way, Braintree (Armani, Calvin Klein, Clarks, Costa, M&S Outlet)	4.1%	20	0.0%	0	4.4%	2	8.3%	6	2.6%	1	1.1%	2	10.2%	8
Bury St Edmunds town centre	3.1%	15	2.3%	2	0.0%	0	0.0%	0	0.0%	0	8.5%	13	0.0%	0
Cambridge city centre	23.7%	114	29.9%	25	19.7%	10	12.6%	10	26.8%	9	36.3%	55	6.0%	5
Cambridge Retail Park, Cambridge (Nando's, Boots, Homebase, Starbucks)	1.2%	6	2.3%	2	0.0%	0	0.0%	0	0.0%	0	2.4%	4	0.0%	0
Central London / West End	1.8%	9	1.1%	1	0.0%	0	7.1%	6	0.0%	0	0.0%	0	2.4%	2

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Chelmer Village Retail Park, Chelmsford (Currys PC World, Next & Next Home, Boots, JD Sport, TK Maxx)	2.2%	11	0.0%	0	0.0%	0	5.8%	5	0.0%	0	0.0%	0	7.3%	6
Chelmsford city centre	13.0%	63	0.0%	0	2.4%	1	39.3%	31	0.0%	0	0.0%	0	37.3%	31
Clock Tower Retail Park, Westway, Chelmsford, CM1 3BH	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	4
DFS, Gallows Corner, Colchester Road, Romford, RM3 0AD	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Glasswells, Newmarket Road, Bury Saint Edmunds	1.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	5	0.0%	0
Harlow district centre	1.3%	6	0.0%	0	7.2%	4	3.2%	2	0.0%	0	0.0%	0	0.0%	0
Harlow Retail Park, Harlow (Argos, Dunelm, Homebase)	2.5%	12	0.6%	1	12.6%	7	4.6%	4	3.4%	1	0.0%	0	0.0%	0
Hi Sell Direct, Station Road, Gamlingay, SG19 3HB	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Home Brands, Skippers Lane, West Wickham, CB21 4SF	0.2%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, Fitzroy Park, Bishops Stortford	0.8%	4	0.0%	0	5.3%	3	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Homelands Retail Park, Cuton Hall Lane, Springfield, Chelmsford (Longacres, Pets Corner, Trade Point, B&Q)	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Ikea Tottenham, Glover Drive, London, N18 3HF	0.9%	5	2.1%	2	2.4%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Ikea, Bletcham Way, Bletchley, Milton Keynes, MK1 1QB	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0
John Lewis, Grand Arcade, Cambridge	3.9%	19	7.4%	6	8.3%	4	0.7%	1	9.0%	3	3.2%	5	0.0%	0
Lakeside Retail Park, West Thurrock (Argos, B&M, Currys PC World, The Range)	2.8%	13	1.7%	1	5.6%	3	2.0%	2	0.0%	0	0.8%	1	7.7%	6
Letchworth Town Centre, SG6 3EW	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Marks & Spencer Simply Food, Braintree Retail Park, Braintree	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Marks & Spencer, South Street, Bishops Stortford	0.4%	2	0.0%	0	3.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Moreton Hall Estate, Easlea Road, Bury St Edmunds, IP32 7BY	0.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	4	0.0%	0
Princes Gate Retail Park, Harlow (Dreams, Wickes, B&M)	0.4%	2	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Riverside Retail Park, Chelmsford (Decathlon, Sports Direct, Smyths Toys, Matalan, McDonald’s)	0.3%	2	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	1.3%	1
Roaring Meg Retail Park, Stevenage (Argos Boots, Currys, DFS, Smyths)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0
Romsey Town Centre, SO51 8BW	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Sainsbury’s, Fifth Avenue, Harlow	0.3%	1	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s, White Hart Lane, Chelmsford	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	3
St James Centre, East Road, Harlow, CM20 2SX	0.3%	1	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St.Edmundsbury Retail Park, Bury St Edmunds, IP32 7BT	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Stevenage town centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	5.2%	2	0.0%	0	0.0%	0
Stratford-upon-Avon Town Centre, CV37 6JP	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0
Tesco Extra, Old North Road, Royston	1.2%	6	0.0%	0	0.0%	0	0.0%	0	14.2%	5	0.8%	1	0.0%	0
Tesco Superstore, Great Notley, Braintree	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Tesco Superstore, Yarrow Road, Fulbourn, Cambridge	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	4	0.0%	0
The Oaks Retail Park, Harlow (B&Q, Bath Store, Home Bargains, Halfords)	0.4%	2	0.0%	0	3.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tollgate Shopping Park, Tollgate West, Stanway (Argos, Boots, Dreams, Next, ScS)	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Welwyn Garden City Town Centre, AL8 6JQ	0.2%	1	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Westfield Stratford City, Montfichet Road, London, E20 1EJ	0.3%	1	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Others														
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		481		83		52		78		33		152		83
Sample:		488		84		45		73		58		148		80

Q18 Where do you normally buy goods such as toys, games, bicycles and recreational goods?

Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Zone 1														
Aldi, (Thaxted Road), Knight Park, Saffron Walden	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Knight Park, Saffron Walden, CB10 2SG	1.4%	4	6.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1
Saffron Walden town centre	10.2%	28	48.0%	21	10.8%	3	1.1%	1	10.0%	1	2.9%	2	0.0%	0
Zone 2														
Co-op, Church Road, Stansted Mountfitchet	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3														
Co-op, Webb Road, Flitch Green	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Dunmow town centre	1.2%	3	0.0%	0	0.0%	0	5.8%	3	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Stortford Road, Great Dunmow	0.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Zone 4														
Royston town centre	1.2%	3	0.0%	0	0.0%	0	0.0%	0	25.8%	3	0.0%	0	0.0%	0
Zone 5														
Aldi, Lordscroft Lane, Haverhill	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Argos in Sainsbury's, Haycocks Road, Haverhill, CB9 7YL	1.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	4	0.0%	0
Cambridge Road Retail Park, Haverhill (B&Q, Halfords, Pets at Homes, Home Bargains)	2.2%	6	2.4%	1	0.0%	0	0.0%	0	0.0%	0	6.4%	5	0.0%	0
Civic Industrial Estate, Homefield Road, Haverhill, CB9 8QP	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Haverhill town centre	6.1%	17	2.4%	1	0.0%	0	0.0%	0	0.0%	0	20.4%	16	0.0%	0
Pampisford Village Centre, CB22 3ER	0.7%	2	4.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s, Haycocks Road, Haverhill	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0
Sawston village centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Tesco Superstore, Cangle Road, Haverhill	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Zone 6														
Co-op, Brook Street, Great Bardfield	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Outside Survey Area														
A1 Retail Park, London Road, Biggleswade, SG18 8PS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Argos in Sainsbury's, White Hart Lane, Springfield, Chelmsford, CM2 5PA	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1
Asda, Coldhams Lane, Cambridge	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
B&Q, Chapel Hill Retail Park, Braintree	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Beehive Centre Retail Park, Cambridge (Asda, Go Outdoors, Next Home, TK Maxx)	1.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	4	0.0%	0
Bishops Stortford town centre	4.7%	13	1.2%	1	22.4%	7	10.9%	6	0.0%	0	0.0%	0	0.0%	0
Braintree town centre	3.5%	10	0.0%	0	0.0%	0	3.5%	2	0.0%	0	0.0%	0	13.6%	8
Braintree Village (Freeport Outlet), Charter Way, Braintree (Armani, Calvin Klein, Clarks, Costa, M&S Outlet)	5.1%	14	0.0%	0	0.0%	0	14.2%	8	0.0%	0	0.0%	0	10.8%	6
Bury St Edmunds town centre	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	3	0.0%	0
Cambridge city centre	18.1%	50	26.4%	11	6.5%	2	3.9%	2	20.0%	3	37.8%	29	4.6%	3
Cambridge Retail Park, Cambridge (Nando's, Boots, Homebase,	1.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.6%	5	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Starbucks)														
Central London / West End	0.7%	2	0.0%	0	0.0%	0	3.5%	2	0.0%	0	0.0%	0	0.0%	0
Chapel Hill Retail Park, Charter Way, Braintree, CM77 8YH	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Chelmer Village Retail Park, Chelmsford (Currys PC World, Next & Next Home, Boots, JD Sport, TK Maxx)	2.2%	6	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	8.3%	5
Chelmsford city centre	12.4%	34	0.0%	0	5.7%	2	39.5%	21	0.0%	0	0.0%	0	18.8%	11
Ely City Centre, CB7 4DL	0.2%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	0	0.0%	0	0.0%	0
Halfords, Robert Boby Trading Estate, Robert Boby Way, Bury St Edmunds, IP33 3DH	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Harlow district centre	1.8%	5	4.0%	2	9.5%	3	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Harlow Retail Park, Harlow (Argos, Dunelm, Homebase)	1.7%	5	0.0%	0	13.6%	4	1.1%	1	0.0%	0	0.0%	0	0.0%	0
John Lewis, Grand Arcade, Cambridge	1.3%	3	1.2%	1	7.1%	2	0.0%	0	6.7%	1	0.0%	0	0.0%	0
Lakeside Retail Park, West Thurrock (Argos, B&M, Currys PC World, The Range)	0.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Morrisons, Broad Street, Cambridge	0.5%	1	0.0%	0	0.0%	0	0.0%	0	10.9%	1	0.0%	0	0.0%	0
Newmarket town cente	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0
Princes Gate Retail Park, Harlow (Dreams, Wickes, B&M)	0.7%	2	0.0%	0	6.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Riverside Retail Park, Chelmsford (Decathlon, Sports Direct, Smyths Toys, Matalan, McDonald’s)	8.8%	24	0.0%	0	0.0%	0	9.6%	5	0.0%	0	0.0%	0	33.0%	19
Roaring Meg Retail Park, Stevenage (Argos Boots, Currys, DFS, Smyths)	0.6%	2	0.0%	0	0.0%	0	0.0%	0	13.3%	2	0.0%	0	0.0%	0
Sawbridgeworth Town Centre, CM21 9JN	0.6%	2	0.0%	0	5.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Smyths Toys, Anglia Retail Park, Bury Road, Ipswich, IP1 5QP	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Stowmarket Town Centre, IP14 1AH	0.2%	1	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Old North Road, Royston	0.7%	2	1.2%	1	0.0%	0	0.0%	0	10.0%	1	0.0%	0	0.0%	0
Tesco Superstore, Great Notley, Braintree	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	3
The Oaks Retail Park, Harlow (B&Q, Bath Store, Home Bargains, Halfords)	0.4%	1	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Queensgate Centre, Edinburgh Way, Harlow, CM20 2DA	1.1%	3	0.0%	0	10.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tollgate Shopping Park, Tollgate West, Stanway (Argos, Boots, Dreams, Next, ScS)	0.4%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Others														
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		273		43		29		54		13		77		57
Sample:		255		40		25		46		22		73		49

Q19 Where do you normally buy chemist goods (including health and beauty products)?
Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Zone 1														
Aldi, (Thaxted Road), Knight Park, Saffron Walden	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newport Village Centre, CB11 3PF	0.5%	4	2.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Saffron Walden town centre	21.8%	174	87.5%	134	6.0%	6	5.4%	7	3.4%	2	10.1%	22	2.5%	3
Tesco Superstore, Radwinter Road, Saffron Walden	0.6%	5	1.6%	2	1.0%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Waitrose, Hill Street, Saffron Walden	0.4%	3	0.6%	1	0.0%	0	0.0%	0	1.7%	1	0.7%	2	0.0%	0
Zone 2														
Co-op, Church Road, Stansted Mountfitchet	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, The Heath, Hatfield Heath, Bishop's Stortford, CM22 7EB	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stansted Mountfitchet village centre	3.2%	25	0.7%	1	23.0%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Takeley village centre	0.6%	5	0.0%	0	2.6%	3	1.6%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Cambridge Road, Stansted Mountfitchet	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3														
Co-op, Webb Road, Flitch Green	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Dunmow town centre	7.8%	63	0.0%	0	2.6%	3	40.4%	54	0.0%	0	0.0%	0	4.5%	6
Tesco Superstore, Stortford Road, Great Dunmow	2.9%	23	0.0%	0	4.3%	5	13.0%	17	0.0%	0	0.0%	0	1.2%	2
Thaxted town centre	1.1%	9	1.2%	2	0.0%	0	5.2%	7	0.0%	0	0.0%	0	0.0%	0
Zone 4														
Royston town centre	3.4%	27	0.0%	0	0.0%	0	0.0%	0	55.3%	27	0.0%	0	0.0%	0
Zone 5														
Aldi, Lordscroft Lane, Haverhill	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	2	0.0%	0
Co-op, High Street, Sawston	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
David Holland Pharmacy, Norton Road, Haverhill, CB9 8LU	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Haverhill town centre	11.2%	90	0.7%	1	0.0%	0	0.0%	0	0.0%	0	40.8%	89	0.0%	0
Sainsbury's, Haycocks Road, Haverhill	2.3%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.4%	18	0.0%	0
Sawston village centre	2.2%	17	0.0%	0	0.0%	0	0.0%	0	0.9%	0	7.7%	17	0.0%	0
Tesco Superstore, Cangle Road, Haverhill	2.5%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.1%	20	0.0%	0
Zone 6														
Co-op, Brook Street, Great Bardfield	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Dickens Place, Copperfield Road, Chelmsford	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	6
Shadforths Pharmacy, Broomfield Road, Chelmsford, CM1 4DP	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Outside Survey Area														
A1 Retail Park, London Road, Biggleswade, SG18 8PS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, London Road, Bishop's Stortford	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Beehive Centre Retail Park, Cambridge (Asda, Go Outdoors, Next Home, TK Maxx)	0.5%	4	0.0%	0	0.0%	0	1.2%	2	0.0%	0	1.0%	2	0.0%	0
Bishops Stortford town centre	6.8%	54	0.6%	1	35.7%	38	9.4%	12	0.0%	0	0.7%	2	1.2%	2
Braintree town centre	4.8%	38	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	25.4%	36
Braintree Village (Freeport Outlet), Charter Way, Braintree (Armani, Calvin Klein, Clarks, Costa, M&S	0.2%	2	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Outlet)														
Bury St Edmunds town centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Cambridge city centre	4.3%	34	1.7%	3	0.0%	0	0.0%	0	8.9%	4	12.5%	27	0.0%	0
Cambridge Retail Park, Cambridge (Nando's, Boots, Homebase, Starbucks)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0
Central London / West End	0.4%	3	0.0%	0	1.2%	1	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Chelmer Village Retail Park, Chelmsford (Currys PC World, Next & Next Home, Boots, JD Sport, TK Maxx)	1.5%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.6%	12
Chelmsford city centre	6.8%	54	0.0%	0	1.2%	1	14.9%	20	0.0%	0	0.0%	0	23.5%	33
Great Shelford Village Centre, CB22 5LZ	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Great Yarmouth Town Centre, NR30 3LJ	0.2%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halstead Town Centre, CO0 2DY	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	3
Harlow district centre	0.5%	4	0.0%	0	3.0%	3	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Harlow Retail Park, Harlow (Argos, Dunelm, Homebase)	0.4%	3	1.1%	2	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lakeside Retail Park, West Thurrock (Argos, B&M, Currys PC World, The Range)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2
Linton Village Centre, CB21 4HS	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	4	0.0%	0
Melbourn Village Centre, SG8 6EF	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2
Morrisons, Broad Street, Cambridge	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Morrisons, Needingworth Road, Cambridge, PE27 4NB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Newmarket town cente	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Old Harlow District Centre, CM17 0AA	0.4%	3	0.0%	0	2.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s, Fifth Avenue, Harlow	0.3%	3	0.0%	0	2.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s, Jackson Square, Bishops Stortford	0.3%	2	0.7%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s, Jackson Square, Bishops Stortford, CM23 3XG	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s, Tofts Walk, Braintree	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Sainsbury’s, White Hart Lane, Chelmsford	1.0%	8	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	4.8%	7
Sainsbury's, Third Avenue, Letchworth, SG6 2HX	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Sawbridgeworth Town Centre, CM21 9JN	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Tesco Extra, Old North Road, Royston	1.9%	15	1.1%	2	0.0%	0	0.0%	0	25.7%	13	0.5%	1	0.0%	0
Tesco Extra, Viking Way, Bar Hill, Cambridge, CB23 8EL	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Tesco Superstore, Bishops Park Centre, Lancaster Way, Bishops Stortford	0.8%	6	0.0%	0	6.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, East Road / Edinburgh Way, Harlow	0.2%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Great Notley, Braintree	1.8%	14	0.0%	0	0.0%	0	2.5%	3	0.0%	0	0.0%	0	7.9%	11
Tesco Superstore, Market Place, Braintree	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Tesco Superstore, Marks Farm, Braintree	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	5
Tesco Superstore, Princes Road, Chelmsford	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	4

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Tesco Superstore, Springfield Road, Chelmsford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Tesco Superstore, Yarrow Road, Fulbourn, Cambridge	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	6	0.0%	0
Waitrose, Northgate End, Bishops Stortford	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Writtle Road Pharmacy, Crompton House, Writtle Road, Chelmsford, CM1 3RW	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Others														
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		798		153		105		132		49		217		141
Sample:		805		148		102		128		86		209		132

Q20 Where do you normally electrical items, such as televisions, washing machines and computers?
Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Zone 1														
Aldi, (Thaxted Road), Knight Park, Saffron Walden	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Saffron Walden town centre	2.7%	12	19.5%	11	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0
Zone 2														
Co-op, Church Road, Stansted Mountfitchet	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3														
Co-op, Webb Road, Flitch Green	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Dunmow town centre	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Stortford Road, Great Dunmow	0.8%	3	0.0%	0	0.0%	0	5.3%	3	0.0%	0	0.0%	0	0.0%	0
Zone 4														
Royston town centre	1.4%	6	3.2%	2	0.0%	0	0.0%	0	14.4%	5	0.0%	0	0.0%	0
Zone 5														
Aldi, Lordscroft Lane, Haverhill	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Argos in Sainsbury's, Haycocks Road, Haverhill, CB9 7YL	1.6%	7	2.6%	1	0.0%	0	0.0%	0	0.0%	0	3.4%	5	0.0%	0
Cambridge Road Retail Park, Haverhill (B&Q, Halfords, Pets at Homes, Home Bargains)	0.8%	3	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	3	0.0%	0
Haverhill town centre	12.9%	56	4.5%	2	0.0%	0	0.0%	0	0.0%	0	33.6%	54	0.0%	0
Sainsbury's, Haycocks Road, Haverhill	1.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	5	0.0%	0
Tesco Superstore, Cangle Road, Haverhill	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0
Zone 6														
Co-op, Brook Street, Great Bardfield	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Dickens Place, Copperfield Road, Chelmsford	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2
Outside Survey Area														
A1 Retail Park, London Road, Biggleswade, SG18 8PS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Chapel Hill Retail Park, Braintree	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
B&Q, Newmarket Road, Cambridge	0.6%	3	1.9%	1	0.0%	0	0.0%	0	1.3%	0	0.8%	1	0.0%	0
Beehive Centre Retail Park, Cambridge (Asda, Go Outdoors, Next Home, TK Maxx)	3.7%	16	15.5%	8	0.0%	0	0.0%	0	0.0%	0	4.9%	8	0.0%	0
Bishops Stortford town centre	1.1%	5	1.7%	1	4.4%	2	2.5%	2	1.3%	0	0.0%	0	0.0%	0
Braintree town centre	2.6%	11	0.0%	0	0.0%	0	7.9%	5	0.0%	0	0.0%	0	7.6%	7
Braintree Village (Freeport Outlet), Charter Way, Braintree (Armani, Calvin Klein, Clarks, Costa, M&S Outlet)	1.6%	7	0.0%	0	0.0%	0	4.6%	3	0.0%	0	0.0%	0	4.7%	4
Bury St Edmunds town centre	0.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	4	0.0%	0
Cambridge city centre	19.0%	83	20.0%	11	22.8%	10	5.2%	3	41.3%	13	26.0%	42	5.0%	4
Cambridge Retail Park, Cambridge (Nando's, Boots, Homebase, Starbucks)	8.7%	38	9.8%	5	0.0%	0	0.0%	0	2.7%	1	19.1%	31	1.2%	1
Central London / West End	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Chapel Hill Retail Park, Charter Way, Braintree, CM77 8YH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Chelmer Village Retail Park, Chelmsford (Currys PC World, Next & Next	12.4%	54	0.0%	0	0.0%	0	24.8%	15	0.0%	0	0.0%	0	44.9%	39

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Home, Boots, JD Sport, TK Maxx)														
Chelmsford city centre	7.4%	32	0.0%	0	0.0%	0	30.6%	19	0.0%	0	0.0%	0	15.3%	13
Colchester Retail Park, Sheepen Road, Colchester, CO3 3LE	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Colchester town centre	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	3
Coldhams Road Industrial Estate, Coldhams Road, Cambridge, CB1 3EW	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Costco, Gunnels Wood Road, Stevenage, SG1 2FW	0.4%	2	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dukes Park Industrial Estate, Montrose Road, Chelmsford, CM2 6TE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Great Baddow Village Centre, CM2 7DW	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Harlow district centre	0.9%	4	0.0%	0	9.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harlow Retail Park, Harlow (Argos, Dunelm, Homebase)	5.2%	23	4.3%	2	35.1%	15	9.0%	6	0.0%	0	0.0%	0	0.0%	0
Homelands Retail Park, Cuton Hall Lane, Springfield, Chelmsford (Longacres, Pets Corner, Trade Point, B&Q)	0.5%	2	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	1.2%	1
John Lewis, Grand Arcade, Cambridge	4.0%	17	11.0%	6	11.9%	5	0.9%	1	12.5%	4	1.1%	2	0.0%	0
Lakeside Retail Park, West Thurrock (Argos, B&M, Currys PC World, The Range)	0.2%	1	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Princes Gate Retail Park, Harlow (Dreams, Wickes, B&M)	0.7%	3	0.0%	0	6.3%	3	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Roaring Meg Retail Park, Stevenage (Argos Boots, Currys, DFS, Smyths)	0.6%	3	0.0%	0	0.0%	0	0.0%	0	8.9%	3	0.0%	0	0.0%	0
Sainsbury's, Jackson Square, Bishops Stortford	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, White Hart Lane, Chelmsford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
St.Edmundsbury Retail Park, Bury St Edmunds, IP32 7BT	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	3	0.0%	0
Tesco Extra, Old North Road, Royston	1.2%	5	0.0%	0	0.0%	0	0.0%	0	16.1%	5	0.0%	0	0.0%	0
Tesco Superstore, Market Place, Braintree	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Tesco Superstore, Springfield Road, Chelmsford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Tesco Superstore, Yarrow Road, Fulbourn, Cambridge	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
The Oaks Retail Park, Harlow (B&Q, Bath Store, Home Bargains, Halfords)	0.7%	3	0.0%	0	4.4%	2	1.6%	1	0.0%	0	0.0%	0	0.0%	0
The Queensgate Centre, Edinburgh Way, Harlow, CM20 2DA	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tollgate Shopping Park, Tollgate West, Stanway (Argos, Boots, Dreams, Next, ScS)	2.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	8.8%	8
Welwyn Garden City Town Centre, AL8 6JQ	0.3%	2	0.0%	0	2.6%	1	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Others														
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		438		54		42		62		32		161		86
Sample:		475		62		40		62		56		168		87

Q21 Where do you normally buy DIY or gardening goods?
Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Zone 1														
Aldi, (Thaxted Road), Knight Park, Saffron Walden	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, Elizabeth Way, Saffron Walden	12.2%	94	65.1%	81	0.0%	0	2.8%	3	5.0%	2	1.1%	3	2.9%	4
Knight Park, Saffron Walden, CB10 2SG	0.4%	3	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Ridgeons, Commercial Centre, Ashdon Road, Saffron Walden, CB10 2NQ	0.4%	3	1.9%	2	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0
Saffron Walden town centre	3.3%	25	9.9%	12	0.0%	0	1.9%	2	3.8%	2	3.4%	8	0.7%	1
Shire Hill Industrial Estate, Saffron Walden, CB11 3AQ	0.2%	2	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Springwell Nursery & Garden Centre, Walden Road, Saffron Walden, CB10 1UE	0.5%	3	0.8%	1	0.7%	1	0.0%	0	0.0%	0	0.8%	2	0.0%	0
Waitrose, Hill Street, Saffron Walden	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2														
Co-op, Church Road, Stansted Mountfitchet	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3														
Co-op, Webb Road, Flitch Green	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Langthorns Plantery, High Cross Lane West, Little Canfield, Dunmow, CM6 1TD	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2
S Perry Chapel End Nursery, Broxted, Great Dunmow	0.3%	2	0.0%	0	0.7%	1	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Stortford Road, Great Dunmow	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Thaxted town centre	0.3%	3	0.7%	1	0.0%	0	1.5%	2	0.0%	0	0.0%	0	0.0%	0
Travis Perkins, Chelmsford Road, Dunmow, CM6 1XG	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Zone 4														
Royston town centre	1.5%	12	1.4%	2	0.0%	0	0.0%	0	18.1%	8	0.9%	2	0.0%	0
Zone 5														
Aldi, Lordscroft Lane, Haverhill	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Cambridge Road Retail Park, Haverhill (B&Q, Halfords, Pets at Homes, Home Bargains)	16.0%	123	1.6%	2	0.0%	0	0.0%	0	0.0%	0	51.0%	121	0.0%	0
Haverhill town centre	2.5%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.1%	19	0.0%	0
Hollands Road Industrial Estate, Haverhill, CB9 8PU	0.9%	7	0.8%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	6	0.0%	0
Sawston village centre	2.3%	18	0.7%	1	0.0%	0	0.0%	0	0.0%	0	7.0%	17	0.0%	0
Sturmer Nurseries, Church Walk, Sturmer, Haverhill, CB9 7XD	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Tesco Superstore, Cangle Road, Haverhill	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Zone 6														
Co-op, Brook Street, Great Bardfield	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Dickens Place, Copperfield Road, Chelmsford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Outside Survey Area														
A1 Retail Park, London Road, Biggleswade, SG18 8PS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Chapel Hill Retail Park, Braintree	10.7%	83	0.0%	0	0.0%	0	29.6%	35	0.0%	0	0.0%	0	31.3%	48

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
B&Q, Homelands Retail Park, Chelmsford	6.6%	51	1.4%	2	0.0%	0	4.7%	6	0.0%	0	0.4%	1	27.9%	43
B&Q, London Road, Stevenage	0.3%	3	0.0%	0	0.0%	0	0.0%	0	6.2%	3	0.0%	0	0.0%	0
B&Q, Newmarket Road, Cambridge	1.9%	15	1.1%	1	0.0%	0	1.3%	2	3.0%	1	4.3%	10	0.0%	0
B&Q, The Oaks Retail Park, Harlow	1.4%	11	0.0%	0	6.6%	6	2.6%	3	2.7%	1	0.0%	0	0.0%	0
Beehive Centre Retail Park, Cambridge (Asda, Go Outdoors, Next Home, TK Maxx)	0.8%	6	0.7%	1	0.0%	0	0.0%	0	1.0%	0	1.9%	4	0.0%	0
Bickerdikes Garden Centre, Norton Road, Letchworth, SG6 1AG	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Bishops Stortford town centre	0.7%	6	0.0%	0	3.8%	4	1.8%	2	0.0%	0	0.0%	0	0.0%	0
Braintree Garden Centre, Cressing Road, Cressing, Braintree, CM77 8DH	1.1%	9	0.0%	0	0.0%	0	3.5%	4	0.0%	0	0.0%	0	2.8%	4
Braintree town centre	0.7%	5	0.0%	0	0.0%	0	3.7%	4	0.0%	0	0.0%	0	0.4%	1
Braintree Village (Freeport Outlet), Charter Way, Braintree (Armani, Calvin Klein, Clarks, Costa, M&S Outlet)	5.2%	40	0.0%	0	2.9%	3	19.2%	23	0.0%	0	0.0%	0	9.4%	14
Bury St Edmunds town centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	2	0.0%	0
Cambridge city centre	0.9%	7	0.0%	0	0.0%	0	0.0%	0	3.3%	1	2.2%	5	0.0%	0
Cambridge Retail Park, Cambridge (Nando's, Boots, Homebase, Starbucks)	0.4%	3	0.4%	1	0.0%	0	0.0%	0	1.0%	0	0.8%	2	0.0%	0
Chelmer Village Retail Park, Chelmsford (Currys PC World, Next & Next Home, Boots, JD Sport, TK Maxx)	0.6%	5	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	1.9%	3
Chelmsford city centre	1.6%	12	0.0%	0	0.0%	0	5.3%	6	0.0%	0	0.0%	0	3.9%	6
Cherry Lane, Coggeshall Road, Braintree, CM77 8AE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Clock Tower Retail Park, Westway, Chelmsford, CM1 3BH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Colchester town centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Coldhams Road Industrial Estate, Coldhams Road, Cambridge, CB1 3EW	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Dobbies Garden Centre, Dunsbridge Turnpike, Royston	1.3%	10	0.4%	1	0.0%	0	0.0%	0	23.3%	10	0.0%	0	0.0%	0
Dukes Park Industrial Estate, Montrose Road, Chelmsford, CM2 6TE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Ernest Doe, Rayne Road, Springwood Industrial Estate, Braintree, CM7 2QS	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Fitzroy Park, Bishops Stortford, CM23 5PP	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Goodlife Park, Stansted Road, Bishop's Stortford, CM23 5PP	1.1%	9	0.0%	0	8.0%	8	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Greenbrook Garden Centre, Ongar Road, Chelmsford, CM1 3SN	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Harlow district centre	0.2%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harlow Garden Centre, Canes Lane, Hastingwood, Harlow, CM17 9LD	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Harlow Retail Park, Harlow (Argos, Dunelm, Homebase)	0.7%	5	1.4%	2	1.1%	1	2.1%	2	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Homebase, Cambridge Retail Park, Cambridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Homebase, Edinburgh Road (Harlow Retail Park), Harlow	0.4%	3	0.0%	0	3.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, Fitzroy Park, Bishops Stortford	10.4%	80	4.0%	5	64.1%	61	10.6%	12	0.0%	0	0.0%	0	1.2%	2
Homebase, Waterhouse Business Centre, Baynes Place, Chelmsford, CM1 2QX	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	4
Homelands Retail Park, Cuton Hall Lane, Springfield, Chelmsford (Longacres, Pets Corner, Trade Point, B&Q)	1.2%	9	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	5.3%	8
Lakeside Retail Park, West Thurrock (Argos, B&M, Currys PC World, The Range)	0.2%	2	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Melbourn Village Centre, SG8 6EF	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0
Merlin Mica Hardware, Market Hill, Royston, SG8 9JS	0.2%	2	0.0%	0	0.0%	0	0.0%	0	3.8%	2	0.0%	0	0.0%	0
Perrywood Garden Centre, Kelvedon Road, Tiptree, Inworth, Colchester, CO5 9SX	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Phillimore Garden Centre, Cambridge Road, Melbourn, Royston, SG8 6EY	0.4%	3	0.0%	0	0.0%	0	0.0%	0	7.0%	3	0.0%	0	0.0%	0
Princes Gate Retail Park, Harlow (Dreams, Wickes, B&M)	0.2%	2	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sawbridgeworth Town Centre, CM21 9JN	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Scotsdales Garden Centre, Cambridge Road, Great Shelford, Cambridge	4.9%	38	4.1%	5	0.7%	1	0.0%	0	9.8%	4	11.8%	28	0.0%	0
Screwfix, Chelmsford Trade Park, Westway, Chelmsford, CM1 3BQ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Screwfix, Northumberland Court, Montrose Road, Chelmsford, CM2 6UW	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Screwfix, Raynham Road Industrial Estate, Bishop's Stortford, CM23 5PB	0.3%	3	0.0%	0	1.8%	2	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Old North Road, Royston	0.3%	2	0.0%	0	0.0%	0	0.0%	0	5.3%	2	0.0%	0	0.0%	0
Wickes, Century Drive, Braintree, CM77 8YL	0.5%	4	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	1.1%	2
Wickes, Cotton Brown Park, Letchworth, SG6 1UP	0.2%	1	0.0%	0	0.0%	0	0.0%	0	3.0%	1	0.0%	0	0.0%	0
Wickes, Cuton Hall Lane, Springfield, Chelmsford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Wickes, Monkswood Way, Stevenage	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Wickes, Princes Gate Retail Park, Howard Way, Harlow	0.1%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Others														
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		771		125		95		118		42		238		153
Sample:		764		126		85		111		72		228		142

Q22 Where do you normally buy furniture, carpets and floor coverings?
Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Zone 1														
Aldi, (Thaxted Road), Knight Park, Saffron Walden	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, Elizabeth Way, Saffron Walden	0.4%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Knight Park, Saffron Walden, CB10 2SG	0.4%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Saffron Walden town centre	8.7%	43	38.5%	33	4.2%	2	2.7%	2	2.6%	1	2.9%	4	0.7%	1
Shire Hill Industrial Estate, Saffron Walden, CB11 3AQ	0.5%	3	3.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2														
Co-op, Church Road, Stansted Mountfitchet	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stansted Mountfitchet village centre	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Takeley village centre	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
You're Furnished, Waltham Hall Industrial Estate, Hall Road, Bamber's Green, CM22 6PF	0.8%	4	0.0%	0	0.0%	0	2.9%	2	0.0%	0	0.0%	0	1.3%	1
Zone 3														
Co-op, Webb Road, Flitch Green	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Dunmow town centre	3.9%	19	2.3%	2	1.4%	1	18.8%	16	0.0%	0	0.0%	0	0.7%	1
Zone 4														
Royston town centre	0.5%	3	0.0%	0	0.0%	0	0.0%	0	9.0%	3	0.0%	0	0.0%	0
Zone 5														
Aldi, Lordscroft Lane, Haverhill	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cambridge Road Retail Park, Haverhill (B&Q, Halfords, Pets at Homes, Home Bargains)	1.8%	9	0.6%	1	1.4%	1	0.0%	0	1.5%	0	4.6%	7	0.0%	0
CGS Carpet Warehouse, Boundary Road, Haverhill, CB9 7YH	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0
Haverhill town centre	7.4%	37	1.7%	1	0.0%	0	0.0%	0	0.0%	0	22.7%	35	0.0%	0
Sawston village centre	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	4	0.0%	0
Zone 6														
Co-op, Brook Street, Great Bardfield	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Outside Survey Area														
A1 Retail Park, London Road, Biggleswade, SG18 8PS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Chapel Hill Retail Park, Braintree	0.4%	2	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.7%	1
B&Q, Homelands Retail Park, Chelmsford	0.6%	3	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	2.4%	2
B&Q, Newmarket Road, Cambridge	0.2%	1	0.0%	0	0.0%	0	0.0%	0	3.0%	1	0.0%	0	0.0%	0
B&Q, The Oaks Retail Park, Harlow	0.3%	1	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Beehive Centre Retail Park, Cambridge (Asda, Go Outdoors, Next Home, TK Maxx)	4.3%	21	8.3%	7	0.0%	0	0.0%	0	1.5%	0	9.0%	14	0.0%	0
Bishops Stortford town centre	1.9%	10	0.0%	0	12.2%	5	4.9%	4	0.0%	0	0.0%	0	0.0%	0
Bluewater Shopping Centre, Greenhithe (Apple, Boots, Clarks, Costa, Superdry)	0.5%	2	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	1.1%	1
Braintree town centre	1.9%	9	0.0%	0	0.0%	0	2.9%	2	0.0%	0	0.0%	0	7.2%	7
Braintree Village (Freeport Outlet), Charter Way, Braintree (Armani, Calvin Klein, Clarks, Costa, M&S Outlet)	6.3%	31	2.0%	2	0.0%	0	20.6%	17	0.0%	0	0.0%	0	12.5%	12
Bury St Edmunds town	3.2%	16	1.1%	1	0.0%	0	0.0%	0	0.0%	0	9.5%	15	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
centre														
Cambridge city centre	13.8%	68	20.0%	17	13.7%	6	4.4%	4	21.6%	6	21.7%	34	1.1%	1
Cambridge Retail Park, Cambridge (Nando's, Boots, Homebase, Starbucks)	3.6%	18	2.3%	2	0.0%	0	1.8%	2	4.1%	1	8.5%	13	0.0%	0
Chapel Hill Retail Park, Charter Way, Braintree, CM77 8YH	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0
Chelmer Village Retail Park, Chelmsford (Currys PC World, Next & Next Home, Boots, JD Sport, TK Maxx)	6.4%	31	1.7%	1	0.0%	0	6.6%	6	0.0%	0	0.0%	0	26.1%	24
Chelmsford city centre	6.5%	32	0.0%	0	2.8%	1	12.9%	11	0.0%	0	0.0%	0	21.1%	20
Clock Tower Retail Park, Westway, Chelmsford, CM1 3BH	1.0%	5	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	4.8%	4
Colchester town centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2
Co-op, Corner of Marconi Street and New Street, Chelmsford, CM1 1PP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Country Flooring, Springfield Road, Springfield, Chelmsford, CM2 6JP	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Earls Colne Village Centre, CO6 2PA	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2
Fishpools, High Street, Waltham Cross, EN8 7AL	0.5%	2	0.0%	0	3.7%	2	0.0%	0	2.6%	1	0.0%	0	0.0%	0
Floor Coverings, Dry Drayton Industries, Scotland Road, Dry Drayton, CB23 8AT	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Glasswells, Newmarket Road, Bury Saint Edmunds	2.5%	12	1.2%	1	0.0%	0	0.0%	0	0.0%	0	7.3%	11	0.0%	0
Glasswells, Newmarket Road, Bury St Edmunds, IP33 3TU	0.5%	2	0.0%	0	0.0%	0	0.7%	1	1.5%	0	0.8%	1	0.0%	0
Great Baddow Village Centre, CM2 7DW	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Harlow district centre	0.5%	3	0.0%	0	5.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harlow Retail Park, Harlow (Argos, Dunelm, Homebase)	3.1%	15	0.6%	1	22.1%	10	5.6%	5	0.0%	0	0.0%	0	0.0%	0
Hi Sell Direct, Station Road, Gamlingay, SG19 3HB	0.2%	1	0.0%	0	0.0%	0	0.0%	0	3.0%	1	0.0%	0	0.0%	0
Home Brands, Skippers Lane, West Wickham, CB21 4SF	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Homebase, Edinburgh Road (Harlow Retail Park), Harlow	0.3%	2	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0
Homebase, Fitzroy Park, Bishops Stortford	0.4%	2	0.0%	0	4.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, Waterhouse Business Centre, Baynes Place, Chelmsford, CM1 2QX	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Homelands Retail Park, Cuton Hall Lane, Springfield, Chelmsford (Longacres, Pets Corner, Trade Point, B&Q)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Ikea Tottenham, Glover Drive, London, N18 3HF	0.4%	2	0.0%	0	2.4%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0
John Lewis, Grand Arcade, Cambridge	2.6%	13	7.4%	6	4.2%	2	0.7%	1	10.4%	3	0.8%	1	0.0%	0
Lakeside Retail Park, West Thurrock (Argos, B&M, Currys PC World, The Range)	2.1%	10	2.9%	2	0.0%	0	2.2%	2	0.0%	0	2.2%	3	2.8%	3
Letchworth Town Centre,	0.2%	1	0.0%	0	0.0%	0	0.0%	0	3.0%	1	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
SG6 3EW														
Melbourn Village Centre, SG8 6EF	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0
Moreton Hall Estate, Easlea Road, Bury St Edmunds, IP32 7BY	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0
Phillimore Garden Centre, Cambridge Road, Melbourn, Royston, SG8 6EY	0.3%	2	0.0%	0	0.0%	0	0.0%	0	5.6%	2	0.0%	0	0.0%	0
Princes Gate Retail Park, Harlow (Dreams, Wickes, B&M)	0.7%	3	0.0%	0	5.1%	2	0.0%	0	4.0%	1	0.0%	0	0.0%	0
Ramsden Mills, Chipping Hill Industrial Estate, Braintree Road, Witham, CM8 2TR	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2
Riverside Retail Park, Chelmsford (Decathlon, Sports Direct, Smyths Toys, Matalan, McDonald's)	0.2%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Roaring Meg Retail Park, Stevenage (Argos Boots, Currys, DFS, Smyths)	0.8%	4	0.0%	0	0.0%	0	0.0%	0	13.3%	4	0.0%	0	0.0%	0
Roebuck Retail Park, Stevenage (Halfords, American Golf)	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0
Sainsbury's, Jackson Square, Bishops Stortford	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
St James Centre, East Road, Harlow, CM20 2SX	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St.Edmundsbury Retail Park, Bury St Edmunds, IP32 7BT	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	3	0.0%	0
Stevenage town centre	0.6%	3	0.0%	0	0.0%	0	0.0%	0	10.4%	3	0.0%	0	0.0%	0
The Oaks Retail Park, Harlow (B&Q, Bath Store, Home Bargains, Halfords)	0.7%	3	0.0%	0	5.1%	2	1.2%	1	0.0%	0	0.0%	0	0.0%	0
The Queensgate Centre, Edinburgh Way, Harlow, CM20 2DA	0.6%	3	0.0%	0	6.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tollgate Shopping Park, Tollgate West, Stanway (Argos, Boots, Dreams, Next, ScS)	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	2
Waltham Abbey Town Centre, EN9 1JH	0.2%	1	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waltham Cross Town Centre, EN8 7AL	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Wickes, Monkswood Way, Stevenage	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2
Willingham Village Centre, CB24 5ES	0.3%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Witham Town Centre, CM8 1BH	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2
Others														
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		491		85		45		85		28		155		94
Sample:		488		84		39		79		48		152		86

Mean score [Times a week]: Daily = 7, 4-6 days a week = 5, 2-3 days a week = 2.5, One day a week = 1, Every two weeks = 0.5, Every three weeks = 0.333, Monthly = 0.25, Once every two months = 0.125, Three-four times a year = 0.071, Twice a year = 0.042, Once a year = 0.021, Less often = 0.014, Never = 0

LOCK4 Before the Covid-19 lockdowns, how often did do non-food shopping online?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Daily	1.0%	10	1.4%	2	0.0%	0	2.0%	3	0.0%	0	1.3%	4	0.3%	1
4-6 days a week	0.7%	7	0.5%	1	0.9%	1	0.0%	0	0.0%	0	0.9%	3	1.1%	2
2-3 days a week	8.1%	81	10.5%	19	8.2%	11	8.8%	14	3.4%	2	8.2%	24	6.5%	12
One day a week	18.6%	186	17.7%	31	15.9%	21	21.0%	32	10.1%	6	17.7%	51	23.2%	44
Every two weeks	14.0%	140	16.9%	30	17.5%	24	17.8%	27	10.7%	6	10.6%	31	11.7%	22
Every three weeks	1.4%	15	2.0%	4	1.3%	2	1.4%	2	0.0%	0	1.9%	5	0.9%	2
Monthly	20.5%	206	20.7%	37	20.6%	28	19.0%	29	15.2%	9	23.5%	68	18.7%	35
Once every two months	4.6%	46	0.8%	1	5.0%	7	5.6%	9	4.4%	3	5.9%	17	5.3%	10
Three-four times a year	5.1%	51	5.4%	10	3.0%	4	4.6%	7	10.4%	6	4.9%	14	5.2%	10
Twice a year	2.9%	29	3.9%	7	2.7%	4	3.6%	5	7.0%	4	2.1%	6	1.5%	3
Once a year	0.3%	3	0.0%	0	0.5%	1	0.0%	0	1.5%	1	0.2%	1	0.6%	1
Less often	2.0%	20	3.1%	5	1.9%	3	1.5%	2	0.7%	0	1.8%	5	2.0%	4
Never	15.9%	159	11.1%	20	18.4%	25	11.5%	18	32.6%	19	16.0%	46	16.9%	32
(Don't know)	2.2%	22	2.7%	5	1.5%	2	2.4%	4	2.7%	2	1.7%	5	2.8%	5
(Varies)	2.8%	28	3.2%	6	2.7%	4	0.7%	1	1.5%	1	3.4%	10	3.4%	6
Mean:		*0.67*		*0.77*		*0.60*		*0.76*		*0.31*		*0.69*		*0.64*
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

Mean score [Times a week]: Daily = 7, 4-6 days a week = 5, 2-3 days a week = 2.5, One day a week = 1, Every two weeks = 0.5, Every three weeks = 0.333, Monthly = 0.25, Once every two months = 0.125, Three-four times a year = 0.071, Twice a year = 0.042, Once a year = 0.021, Less often = 0.014, Never = 0

LOCK5 During the Covid-19 lockdowns, how often did do non-food shopping online?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Daily	2.3%	23	3.7%	7	1.2%	2	3.4%	5	0.0%	0	3.2%	9	0.3%	1
4-6 days a week	3.4%	34	1.6%	3	4.1%	6	5.7%	9	1.5%	1	4.1%	12	2.3%	4
2-3 days a week	14.1%	141	14.4%	25	14.4%	19	13.0%	20	6.7%	4	14.2%	41	16.6%	31
One day a week	20.5%	205	21.3%	38	20.8%	28	22.0%	34	18.2%	11	18.5%	54	21.9%	41
Every two weeks	14.5%	145	17.8%	31	16.8%	23	18.5%	28	3.6%	2	12.9%	38	12.3%	23
Every three weeks	2.5%	25	2.2%	4	1.4%	2	2.8%	4	0.0%	0	3.0%	9	3.3%	6
Monthly	13.2%	132	14.3%	25	7.9%	11	9.8%	15	15.4%	9	16.1%	47	13.4%	25
Once every two months	4.2%	42	3.4%	6	5.8%	8	4.5%	7	5.8%	3	4.4%	13	2.5%	5
Three-four times a year	3.0%	30	5.1%	9	0.0%	0	2.4%	4	8.7%	5	2.2%	6	3.1%	6
Twice a year	1.8%	18	0.3%	1	0.5%	1	3.2%	5	7.7%	4	1.0%	3	2.4%	4
Once a year	0.8%	8	1.7%	3	2.0%	3	0.7%	1	0.0%	0	0.0%	0	0.6%	1
Less often	1.4%	14	1.0%	2	2.3%	3	0.7%	1	2.2%	1	1.4%	4	1.3%	2
Never	14.5%	145	8.6%	15	20.5%	28	11.2%	17	27.5%	16	15.0%	44	13.5%	25
(Don't know)	1.7%	17	1.1%	2	0.0%	0	1.6%	3	1.3%	1	2.4%	7	2.4%	5
(Varies)	2.3%	23	3.5%	6	2.2%	3	0.4%	1	1.5%	1	1.6%	5	4.1%	8
Mean:		*1.06*		*1.11*		*1.00*		*1.23*		*0.52*		*1.14*		*0.95*
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

Mean score: More = 1, Same = 0, Less = -1

QD Non-food shopping online DURING lockdowns compared to BEFORE lockdowns:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
More	35.8%	358	35.0%	62	39.9%	54	35.7%	55	27.2%	16	36.5%	106	35.0%	66
Same	52.1%	522	50.3%	89	46.1%	62	54.8%	84	62.8%	37	52.9%	154	51.5%	97
Less	6.1%	61	8.1%	14	9.8%	13	6.3%	10	5.8%	3	3.5%	10	5.5%	10
(Don't know / varies)	6.0%	60	6.5%	12	4.2%	6	3.1%	5	4.2%	2	7.0%	20	8.1%	15
Mean:		*0.32*		*0.29*		*0.31*		*0.30*		*0.22*		*0.36*		*0.32*
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

Mean score [Times a week]: Daily = 7, 4-6 days a week = 5, 2-3 days a week = 2.5, One day a week = 1, Every two weeks = 0.5, Every three weeks = 0.333, Monthly = 0.25, Once every two months = 0.125, Three-four times a year = 0.071, Twice a year = 0.042, Once a year = 0.021, Less often = 0.014, Never = 0

LOCK6 After the Covid-19 lockdowns, how often will you do non-food shopping online?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Daily	1.5%	15	2.2%	4	3.3%	4	1.4%	2	0.0%	0	1.3%	4	0.3%	1
4-6 days a week	1.1%	11	0.0%	0	2.6%	4	1.0%	2	1.5%	1	1.3%	4	0.6%	1
2-3 days a week	10.7%	107	13.8%	24	8.1%	11	10.3%	16	3.4%	2	10.4%	30	12.6%	24
One day a week	18.4%	184	15.2%	27	16.2%	22	19.9%	31	14.3%	8	20.1%	58	20.2%	38
Every two weeks	15.0%	150	19.3%	34	19.1%	26	21.9%	34	9.6%	6	9.9%	29	11.6%	22
Every three weeks	1.3%	13	1.1%	2	0.9%	1	1.4%	2	0.0%	0	1.7%	5	1.6%	3
Monthly	20.6%	207	21.3%	38	15.1%	20	17.8%	27	15.0%	9	24.9%	72	21.5%	40
Once every two months	4.9%	49	1.2%	2	8.4%	11	5.7%	9	7.5%	4	5.5%	16	3.6%	7
Three-four times a year	3.9%	39	5.1%	9	1.3%	2	4.2%	7	9.5%	6	3.5%	10	3.1%	6
Twice a year	1.7%	17	1.9%	3	0.5%	1	2.9%	4	7.0%	4	0.6%	2	1.5%	3
Once a year	0.4%	4	0.8%	1	0.5%	1	0.0%	0	1.5%	1	0.0%	0	0.6%	1
Less often	1.5%	15	2.3%	4	1.9%	3	0.7%	1	2.2%	1	0.8%	2	1.9%	4
Never	12.8%	129	8.0%	14	16.3%	22	9.5%	15	26.0%	15	12.8%	37	13.7%	26
(Don’t know)	2.3%	23	3.2%	6	3.2%	4	1.6%	3	1.3%	1	1.9%	5	2.1%	4
(Varies)	4.0%	40	4.6%	8	2.7%	4	1.5%	2	1.5%	1	5.4%	16	5.1%	10
Mean:		*0.81*		*0.89*		*0.93*		*0.81*		*0.42*		*0.81*		*0.76*
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

Mean score: More = 1, Same = 0, Less = -1

QE Non-food shopping online AFTER lockdowns compared to DURING lockdowns:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
More	5.2%	52	6.1%	11	8.5%	11	5.6%	9	5.8%	3	4.4%	13	2.5%	5
Same	61.9%	621	60.7%	107	56.6%	76	60.1%	92	72.8%	42	61.6%	179	65.6%	123
Less	25.8%	259	24.7%	44	29.0%	39	31.1%	48	18.7%	11	25.8%	75	22.4%	42
(Don't know / varies)	7.1%	71	8.5%	15	5.9%	8	3.1%	5	2.7%	2	8.2%	24	9.6%	18
Mean:		*-0.22*		*-0.20*		*-0.22*		*-0.26*		*-0.13*		*-0.23*		*-0.22*
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

Mean score: More = 1, Same = 0, Less = -1

QF Non-food shopping online AFTER lockdowns compared to BEFORE lockdowns:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
More	15.9%	159	13.1%	23	20.5%	28	10.8%	17	15.8%	9	16.2%	47	19.0%	36
Same	69.9%	701	70.0%	124	64.3%	87	81.2%	125	73.7%	43	70.6%	205	62.5%	117
Less	6.2%	62	7.4%	13	8.8%	12	3.8%	6	6.4%	4	3.9%	11	8.7%	16
(Don't know / varies)	8.0%	80	9.5%	17	6.3%	9	4.3%	7	4.2%	2	9.2%	27	9.8%	18
Mean:		*0.11*		*0.06*		*0.13*		*0.07*		*0.10*		*0.14*		*0.11*
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

Q23 Which of the following forms of shopping do you carry out? [MR/PR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Internet	61.1%	613	69.0%	122	58.6%	79	66.9%	103	47.4%	28	65.5%	190	48.4%	91
Portable internet shopping (through mobile phone)	55.7%	558	59.9%	106	55.1%	74	60.6%	93	38.8%	23	52.6%	153	58.4%	110
TV Shopping	2.8%	28	1.8%	3	3.3%	4	2.4%	4	2.7%	2	2.6%	8	4.2%	8
(None of these)	11.6%	117	7.2%	13	12.3%	17	6.9%	11	30.4%	18	11.8%	34	13.2%	25
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

Q24 Which goods or services do you currently purchase via Internet or TV shopping? [MR]
Those who cary out of the types of shopping at Q23

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Baby items	1.0%	9	2.1%	3	0.0%	0	1.1%	2	0.0%	0	0.6%	2	1.2%	2
Banking / finance	6.8%	60	17.3%	28	3.5%	4	4.8%	7	0.0%	0	6.3%	16	2.9%	5
Books	38.7%	342	35.3%	58	38.9%	46	43.0%	62	40.9%	17	42.1%	108	32.1%	52
CDs, DVDs, Vinyl (physical products)	21.9%	194	25.4%	42	12.8%	15	22.5%	32	19.8%	8	26.1%	67	18.4%	30
Clothes / shoes	51.9%	459	53.9%	89	44.1%	52	52.7%	75	45.3%	18	54.3%	139	52.5%	85
Computer / printer accessories	6.9%	61	14.0%	23	7.6%	9	4.1%	6	3.9%	2	4.4%	11	6.3%	10
Console / PC games	3.8%	33	9.5%	16	1.4%	2	3.0%	4	3.1%	1	4.2%	11	0.0%	0
Cosmetics / health / beauty / chemist goods	9.9%	88	6.9%	11	9.7%	11	11.6%	17	7.0%	3	7.4%	19	16.3%	27
Craft / hobby items (including stationary)	8.3%	74	14.9%	24	3.9%	5	7.9%	11	3.1%	1	9.6%	25	4.6%	8
DIY / hardware goods	7.5%	67	14.2%	23	5.7%	7	9.0%	13	3.1%	1	4.3%	11	7.0%	11
Domestic electrical appliances (white goods)	14.5%	129	14.8%	24	14.0%	17	16.3%	23	16.7%	7	11.7%	30	17.0%	28
Downloadable content (e.g. music / movies / tv / games / apps)	7.0%	62	19.1%	31	6.9%	8	0.8%	1	0.0%	0	6.3%	16	3.3%	5
Food / groceries	17.2%	153	13.8%	23	18.6%	22	18.7%	27	25.6%	10	17.8%	46	15.3%	25
Furniture / soft furnishings / floor coverings / carpets	11.5%	102	7.2%	12	5.9%	7	16.8%	24	13.4%	5	12.8%	33	12.8%	21
Garden items	4.6%	40	6.6%	11	5.0%	6	3.2%	5	6.0%	2	4.9%	13	2.5%	4
Gifts	13.5%	120	23.7%	39	13.2%	16	9.2%	13	11.5%	5	16.5%	42	3.1%	5
Holiday and / or Travel / Event Tickets	6.3%	56	15.8%	26	5.7%	7	2.0%	3	1.0%	0	6.9%	18	1.5%	2
Insurance	5.4%	48	16.7%	27	3.5%	4	0.8%	1	0.0%	0	5.5%	14	0.7%	1
Jewellery	3.3%	29	6.2%	10	1.4%	2	3.2%	5	6.0%	2	3.4%	9	1.0%	2
Mobile phone accessories	2.5%	23	8.3%	14	1.9%	2	0.0%	0	0.0%	0	1.1%	3	2.3%	4
Musical instruments / accessories	1.1%	9	2.7%	5	0.0%	0	0.0%	0	0.0%	0	1.9%	5	0.0%	0
Pet food / products	5.0%	45	8.5%	14	5.9%	7	3.4%	5	2.9%	1	4.6%	12	3.5%	6
Small electrical items (e.g. kettles / toasters / hairdryers etc)	20.7%	183	18.8%	31	16.9%	20	21.2%	30	20.6%	8	24.2%	62	19.4%	32
Small household goods	19.4%	172	15.9%	26	21.7%	26	21.5%	31	21.8%	9	19.9%	51	17.9%	29
Sports goods	6.3%	56	10.5%	17	4.6%	6	4.7%	7	4.9%	2	4.9%	13	7.0%	11
Toys	13.3%	118	18.1%	30	17.3%	21	8.3%	12	16.7%	7	10.5%	27	13.3%	22
TVs, Hi-Fi's, computers	12.4%	110	8.1%	13	8.4%	10	16.3%	23	8.6%	3	14.5%	37	13.7%	22
Vehicle parts	2.0%	18	2.1%	3	0.9%	1	0.7%	1	0.0%	0	2.8%	7	3.1%	5
Vehicles	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	2	1.0%	2
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know)	5.1%	45	4.2%	7	7.2%	9	4.2%	6	1.0%	0	5.4%	14	6.1%	10
Weighted base:		885		164		118		143		41		256		163
Sample:		837		151		108		132		67		233		146

Q25 Excluding what you've already mentioned - Which other goods or services are you likely to purchase in the future via Internet or TV shopping? [MR]
Those who cary out of the types of shopping at Q23

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Baby items	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	2	0.0%	0
Banking / finance	0.8%	7	0.3%	1	0.9%	1	0.0%	0	0.0%	0	1.5%	4	1.0%	2
Books	1.4%	12	1.4%	2	0.0%	0	1.8%	3	0.0%	0	0.7%	2	3.3%	5
CDs, DVDs, Vinyl (physical products)	0.4%	3	0.3%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	2
Clothes / shoes	2.9%	26	2.5%	4	5.8%	7	1.9%	3	4.2%	2	2.2%	6	2.9%	5
Computer / printer accessories	0.6%	5	0.3%	1	0.0%	0	0.4%	1	0.0%	0	1.6%	4	0.0%	0
Console / PC games	0.6%	6	1.0%	2	0.0%	0	0.0%	0	0.0%	0	1.6%	4	0.0%	0
Cosmetics / health / beauty / chemist goods	0.5%	5	1.2%	2	1.4%	2	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Craft / hobby items (including stationary)	1.9%	17	1.7%	3	0.0%	0	1.9%	3	1.0%	0	2.3%	6	3.0%	5
DIY / hardware goods	0.9%	8	0.3%	1	0.0%	0	0.0%	0	1.0%	0	1.0%	3	2.5%	4
Domestic electrical appliances (white goods)	1.1%	10	1.2%	2	1.1%	1	0.0%	0	1.0%	0	0.8%	2	2.5%	4
Downloadable content (e.g. music / movies / tv / games / apps)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Food / groceries	1.0%	9	0.6%	1	2.3%	3	0.4%	1	0.0%	0	0.2%	1	2.6%	4
Furniture / soft furnishings / floor coverings / carpets	1.2%	10	2.3%	4	2.5%	3	0.0%	0	1.8%	1	0.9%	2	0.4%	1
Garden items	0.8%	7	2.7%	5	0.5%	1	0.8%	1	0.0%	0	0.5%	1	0.0%	0
Gifts	5.1%	45	1.7%	3	0.5%	1	2.7%	4	3.1%	1	10.5%	27	6.0%	10
Holiday and / or Travel / Event Tickets	4.6%	41	3.8%	6	3.2%	4	5.1%	7	0.0%	0	6.4%	16	4.3%	7
Insurance	0.6%	6	0.6%	1	0.9%	1	0.0%	0	1.8%	1	1.1%	3	0.0%	0
Jewellery	1.6%	15	1.9%	3	3.1%	4	0.0%	0	0.0%	0	1.7%	4	2.0%	3
Mobile phone accessories	0.6%	6	0.0%	0	1.4%	2	0.0%	0	0.0%	0	1.6%	4	0.0%	0
Musical instruments / accessories	0.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pet food / products	1.3%	11	1.2%	2	0.9%	1	0.0%	0	0.0%	0	1.7%	4	2.4%	4
Small electrical items (e.g. kettles / toasters / hairdryers etc)	2.7%	24	3.8%	6	4.6%	5	3.2%	5	0.0%	0	2.8%	7	0.4%	1
Small household goods	2.9%	25	3.6%	6	6.7%	8	3.1%	4	2.1%	1	1.0%	3	2.2%	4
Sports goods	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0
Toys	1.3%	12	3.8%	6	3.0%	4	0.0%	0	0.0%	0	0.5%	1	0.4%	1
TVs, Hi-Fi's, computers	1.5%	13	3.0%	5	2.8%	3	0.4%	1	0.0%	0	1.6%	4	0.4%	1
Vehicle parts	0.2%	2	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Vehicles	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	16.4%	145	20.8%	34	13.0%	15	14.0%	20	4.9%	2	17.1%	44	18.3%	30
(Nothing new / same goods as I currently am)	60.0%	531	59.7%	98	62.0%	73	67.2%	96	81.0%	33	53.2%	136	58.3%	95
Weighted base:		885		164		118		143		41		256		163
Sample:		837		151		108		132		67		233		146

Q26A For your last Internet or TV order, how did you receive your goods?
Those who cary out of the types of shopping at Q23

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Collection at store	2.4%	22	2.9%	5	2.6%	3	1.9%	3	3.9%	2	1.3%	3	3.8%	6
Home delivery	95.1%	842	95.9%	158	94.0%	111	96.6%	138	95.1%	39	94.2%	241	94.8%	154
Delivery to place of work	0.8%	7	0.6%	1	0.0%	0	0.0%	0	1.0%	0	1.8%	5	0.7%	1
Collection at click and collect hub	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Collection at other location	0.3%	3	0.3%	1	0.0%	0	0.7%	1	0.0%	0	0.5%	1	0.0%	0
(Don't know / varies)	1.4%	12	0.3%	1	3.3%	4	0.8%	1	0.0%	0	2.2%	6	0.8%	1
Weighted base:		885		164		118		143		41		256		163
Sample:		837		151		108		132		67		233		146

Q27 Do you ever visit the following Centres? [MR/PR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Saffron Walden	58.6%	588	96.0%	170	50.3%	68	53.6%	82	60.2%	35	63.0%	183	26.4%	50
Great Dunmow	31.1%	312	16.6%	29	36.6%	49	91.4%	140	1.5%	1	6.0%	18	39.5%	74
Stansted Mountfitchet	16.2%	162	18.2%	32	57.5%	78	14.3%	22	2.2%	1	3.8%	11	9.8%	18
Thaxted	15.2%	152	20.7%	37	6.4%	9	38.8%	60	0.0%	0	5.3%	15	17.0%	32
(Do not visit any of these centres)	25.6%	257	3.1%	6	17.3%	23	3.4%	5	39.8%	23	35.6%	103	51.1%	96
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

Q27A Which of those centres do you visit most often? [PR]
Those who visit at least one of the centres at Q27

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Saffron Walden	59.4%	443	94.5%	162	26.1%	29	8.3%	12	97.6%	34	95.3%	178	29.5%	27
Great Dunmow	27.1%	202	0.0%	0	19.8%	22	82.9%	123	0.0%	0	3.0%	6	56.0%	51
Stansted Mountfitchet	9.0%	67	1.3%	2	52.0%	58	0.0%	0	2.4%	1	0.3%	1	5.6%	5
Thaxted	4.5%	33	4.1%	7	2.1%	2	8.8%	13	0.0%	0	1.4%	3	8.9%	8
Weighted base:		745		171		112		149		35		187		92
Sample:		730		164		109		140		57		177		83

Mean score [Times a month]: Daily = 28, At least two times a week = 8, At least once a week = 4, At least once a fortnight = 2, At least once a month = 1, At least every two months = 0.5, At least every 3 months = 0.333, At least every 6 months = 0.166, Less often than once every 6 months = 0.111

Q28A How often do you visit (CENTRE MENTIONED AT Q27A)?
Those who visit at least one of the centres at Q27

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Daily	9.1%	68	10.8%	18	16.6%	19	14.4%	21	0.0%	0	3.0%	6	4.0%	4
At least two times a week	18.1%	135	36.4%	62	14.0%	16	21.6%	32	5.7%	2	8.3%	16	7.9%	7
At least once a week	21.2%	158	31.3%	54	24.9%	28	28.1%	42	8.8%	3	9.5%	18	15.6%	14
At least once a fortnight	14.1%	105	10.8%	19	10.8%	12	19.6%	29	16.9%	6	13.8%	26	15.1%	14
At least once a month	14.9%	111	6.0%	10	13.7%	15	12.5%	19	22.3%	8	19.7%	37	24.2%	22
At least every two months	6.2%	46	0.0%	0	5.4%	6	0.7%	1	13.9%	5	14.9%	28	6.8%	6
At least every 3 months	5.9%	44	0.6%	1	4.7%	5	2.2%	3	6.9%	2	12.1%	23	10.2%	9
At least every 6 months	3.8%	28	0.0%	0	5.8%	6	0.0%	0	12.1%	4	6.7%	13	5.4%	5
Less often than once every 6 months	3.1%	23	0.0%	0	0.0%	0	0.0%	0	8.1%	3	8.3%	15	5.0%	5
Have only visited once	0.7%	5	1.0%	2	0.0%	0	0.0%	0	1.2%	0	0.6%	1	1.8%	2
(Don't know / varies)	3.0%	23	3.2%	5	4.1%	5	1.1%	2	4.0%	1	3.1%	6	4.0%	4
Mean:		*5.53*		*7.78*		*7.48*		*7.49*		*1.58*		*2.58*		*3.18*
Weighted base:		745		171		112		149		35		187		92
Sample:		730		164		109		140		57		177		83

Q28B How do you usually travel to (CENTRE MENTIONED AT Q27A)?
Those who visit at least one of the centres at Q27

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Car / van (as driver)	71.8%	535	59.8%	103	67.0%	75	62.3%	93	88.8%	31	80.5%	151	91.0%	83
Car / van (as passenger)	6.3%	47	3.1%	5	2.8%	3	6.3%	9	7.3%	3	11.8%	22	5.2%	5
Bus (including the busway or guided bus), minibus or coach	1.4%	10	3.6%	6	0.6%	1	0.0%	0	0.0%	0	0.9%	2	2.0%	2
Motorcycle, scooter or moped	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	18.7%	140	30.5%	52	28.5%	32	30.0%	45	0.0%	0	5.1%	10	1.8%	2
Taxi	0.4%	3	0.0%	0	0.6%	1	0.0%	0	0.0%	0	1.1%	2	0.0%	0
Train	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Bicycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mobility scooter / disability vehicle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.2%	9	3.0%	5	0.0%	0	1.4%	2	4.0%	1	0.0%	0	0.0%	0
Weighted base:		745		171		112		149		35		187		92
Sample:		730		164		109		140		57		177		83

Q29 What do you like most about (CENTRE MENTIONED AT Q27A)?
Those who visit at least one of the centres at Q27

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Choice and range of shops	31.3%	233	27.8%	48	29.8%	33	26.9%	40	45.0%	16	35.2%	66	33.7%	31
Strength of supermarket provision	0.7%	5	0.3%	1	1.1%	1	0.0%	0	0.0%	0	1.7%	3	0.0%	0
Choice of leisure facilities (restaurants, pubs etc)	4.4%	33	2.9%	5	2.2%	3	4.6%	7	1.2%	0	6.8%	13	5.8%	5
Choice of services (hairdressers, banks etc)	2.3%	17	0.0%	0	4.9%	5	4.1%	6	1.2%	0	2.0%	4	1.3%	1
Environmental quality of centre	17.2%	128	14.2%	24	8.8%	10	13.1%	19	23.6%	8	21.2%	40	29.2%	27
Close to home	14.0%	105	18.3%	31	21.3%	24	22.8%	34	1.2%	0	4.5%	8	7.2%	7
Close to work	0.6%	5	0.8%	1	1.0%	1	0.0%	0	2.4%	1	0.0%	0	1.3%	1
Easily accessible by public transport	0.2%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Convenient car parking	2.8%	21	1.6%	3	3.6%	4	1.2%	2	1.2%	0	5.4%	10	2.0%	2
Free car parking	0.2%	1	0.0%	0	0.0%	0	0.4%	1	2.4%	1	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Close to friends / family	1.5%	11	0.0%	0	3.6%	4	1.3%	2	1.2%	0	1.9%	4	1.2%	1
Compact centre / easy to get around	3.1%	23	3.8%	7	0.6%	1	3.2%	5	1.2%	0	2.6%	5	6.0%	6
Familiarity / habit	0.6%	5	0.3%	1	0.0%	0	1.2%	2	3.3%	1	0.6%	1	0.0%	0
Nice atmosphere / friendly people	3.2%	24	3.7%	6	6.0%	7	6.9%	10	0.0%	0	0.3%	1	0.0%	0
Quiet / not too busy	1.8%	14	3.3%	6	2.0%	2	1.0%	2	0.0%	0	1.5%	3	1.3%	1
The market	4.1%	30	5.1%	9	2.7%	3	1.7%	2	4.0%	1	7.3%	14	1.3%	1
The pedestrianisation	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
(Nothing in particular)	12.0%	89	17.9%	31	11.9%	13	11.6%	17	12.1%	4	8.0%	15	9.6%	9
Weighted base:		745		171		112		149		35		187		92
Sample:		730		164		109		140		57		177		83

Q30 Are there any measures that would encourage you to visit (CENTRE MENTIONED AT Q27A) more often?
Those who visit at least one of the centres at Q27

1st mention

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Increased general choice and range of shops	15.0%	112	16.6%	28	9.5%	11	28.4%	42	6.0%	2	8.5%	16	13.9%	13
Improved food shops within the town centre	1.2%	9	0.5%	1	2.1%	2	3.6%	5	0.0%	0	0.3%	1	0.0%	0
Discount foodstores within the town centre	0.6%	4	0.8%	1	0.6%	1	0.4%	1	0.0%	0	0.0%	0	1.8%	2
Improved non-food shops within the town centre	2.7%	20	2.2%	4	2.9%	3	4.7%	7	0.0%	0	1.8%	3	2.5%	2
Improved leisure facilities	3.2%	24	3.9%	7	1.1%	1	7.1%	11	0.0%	0	0.6%	1	4.7%	4
Improved quality of shops	0.5%	4	2.0%	3	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
More parking	8.3%	62	9.8%	17	4.7%	5	8.7%	13	5.4%	2	10.7%	20	5.8%	5
Cheaper parking	5.7%	43	6.1%	10	4.1%	5	5.4%	8	2.1%	1	8.5%	16	3.2%	3
Improved street cleaning	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Increased public transport	1.5%	11	1.1%	2	2.6%	3	2.1%	3	0.0%	0	1.6%	3	0.0%	0
Cheaper public transport	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better environment	2.7%	20	6.2%	11	0.6%	1	3.0%	4	1.2%	0	0.6%	1	3.1%	3
Better security	0.6%	5	0.8%	1	1.5%	2	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Longer opening hours	0.4%	3	0.8%	1	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better disabled access	0.5%	4	0.3%	1	0.0%	0	0.0%	0	2.4%	1	1.2%	2	0.0%	0
Better range of service outlets	1.3%	10	0.3%	1	2.1%	2	1.6%	2	0.0%	0	1.7%	3	1.3%	1
Fewer charity shops	0.2%	2	0.3%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Fewer empty shops	0.3%	2	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Improve congestion / too busy	2.0%	15	4.1%	7	1.1%	1	1.8%	3	3.3%	1	0.6%	1	1.3%	1
More clothes shops	1.7%	12	1.8%	3	5.4%	6	1.0%	2	0.0%	0	0.0%	0	1.8%	2
(Nothing / Nothing else)	46.3%	345	37.7%	65	57.2%	64	27.4%	41	69.8%	25	57.3%	107	48.1%	44
(Don't know)	5.3%	39	4.1%	7	3.9%	4	0.8%	1	9.7%	3	6.4%	12	12.5%	11
Weighted base:		745		171		112		149		35		187		92
Sample:		730		164		109		140		57		177		83

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
2nd mention														
Increased general choice and range of shops	2.9%	22	6.6%	11	3.6%	4	2.2%	3	0.0%	0	1.0%	2	1.3%	1
Improved food shops within the town centre	3.1%	23	2.5%	4	4.0%	4	6.5%	10	0.0%	0	1.1%	2	3.0%	3
Discount foodstores within the town centre	0.2%	2	0.0%	0	0.0%	0	1.0%	2	0.0%	0	0.0%	0	0.0%	0
Improved non-food shops within the town centre	2.1%	16	3.7%	6	1.1%	1	4.8%	7	0.0%	0	0.6%	1	0.0%	0
Improved leisure facilities	1.0%	8	1.9%	3	1.1%	1	1.0%	2	0.0%	0	0.9%	2	0.0%	0
Improved quality of shops	1.8%	13	2.4%	4	0.6%	1	3.5%	5	0.0%	0	1.1%	2	1.2%	1
More parking	1.8%	13	2.5%	4	0.0%	0	4.4%	7	2.1%	1	0.6%	1	0.7%	1
Cheaper parking	2.6%	19	1.6%	3	1.7%	2	6.4%	9	0.0%	0	2.2%	4	1.3%	1
Improved street cleaning	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Increased public transport	0.5%	3	0.8%	1	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Cheaper public transport	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better environment	1.0%	8	2.2%	4	0.0%	0	0.4%	1	0.0%	0	1.0%	2	1.8%	2
Better security	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Longer opening hours	0.7%	5	1.0%	2	0.0%	0	0.8%	1	0.0%	0	1.1%	2	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better range of service outlets	0.6%	4	0.0%	0	0.0%	0	1.5%	2	0.0%	0	0.6%	1	1.2%	1
Fewer charity shops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Fewer empty shops	0.2%	2	1.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improve congestion / too busy	1.1%	8	1.4%	2	2.5%	3	0.7%	1	0.0%	0	1.1%	2	0.0%	0
More clothes shops	0.6%	4	1.9%	3	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
(Nothing / Nothing else)	71.5%	533	66.3%	114	75.9%	85	61.0%	91	88.2%	31	80.4%	150	68.3%	63
(Don't know)	8.3%	62	4.1%	7	9.5%	11	3.8%	6	9.7%	3	8.2%	15	21.2%	19
Weighted base:		745		171		112		149		35		187		92
Sample:		730		164		109		140		57		177		83
3rd mention														
Increased general choice and range of shops	0.8%	6	0.8%	1	0.6%	1	2.9%	4	0.0%	0	0.0%	0	0.0%	0
Improved food shops within the town centre	0.2%	1	0.0%	0	0.6%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Discount foodstores within the town centre	0.1%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Improved non-food shops within the town centre	1.3%	10	0.6%	1	0.6%	1	2.8%	4	0.0%	0	1.7%	3	1.2%	1
Improved leisure facilities	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Improved quality of shops	0.5%	4	0.5%	1	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.7%	1
More parking	0.8%	6	1.0%	2	0.0%	0	0.8%	1	0.0%	0	1.7%	3	0.0%	0
Cheaper parking	0.6%	5	1.1%	2	0.0%	0	0.0%	0	2.1%	1	1.1%	2	0.0%	0
Improved street cleaning	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Increased public transport	0.2%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Cheaper public transport	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better environment	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Better security	0.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Longer opening hours	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better range of service outlets	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fewer charity shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fewer empty shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improve congestion / too busy	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More clothes shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing / Nothing else)	84.0%	626	84.4%	145	88.2%	98	84.1%	125	88.2%	31	85.4%	160	73.6%	67
(Don't know)	10.9%	82	10.8%	18	9.5%	11	5.2%	8	9.7%	3	10.1%	19	24.6%	23
Weighted base:		745		171		112		149		35		187		92
Sample:		730		164		109		140		57		177		83

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	

Any mention

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Increased general choice and range of shops	18.8%	140	24.0%	41	13.7%	15	33.5%	50	6.0%	2	9.5%	18	15.2%	14
Improved food shops within the town centre	4.5%	34	3.1%	5	6.7%	7	10.5%	16	0.0%	0	1.4%	3	3.0%	3
Discount foodstores within the town centre	0.8%	6	0.8%	1	0.6%	1	1.8%	3	0.0%	0	0.0%	0	1.8%	2
Improved non-food shops within the town centre	6.1%	46	6.5%	11	4.6%	5	12.3%	18	0.0%	0	4.2%	8	3.7%	3
Improved leisure facilities	4.4%	33	5.8%	10	2.2%	3	8.8%	13	0.0%	0	1.5%	3	4.7%	4
Improved quality of shops	2.8%	21	5.0%	9	0.6%	1	5.2%	8	0.0%	0	1.1%	2	1.8%	2
More parking	11.0%	82	13.3%	23	4.7%	5	13.9%	21	7.5%	3	13.0%	24	6.5%	6
Cheaper parking	8.9%	67	8.8%	15	5.8%	7	11.8%	17	4.2%	1	11.7%	22	4.5%	4
Improved street cleaning	0.2%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Increased public transport	2.1%	15	1.9%	3	2.6%	3	4.2%	6	0.0%	0	1.6%	3	0.0%	0
Cheaper public transport	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better environment	3.9%	29	8.4%	14	0.6%	1	4.1%	6	1.2%	0	1.6%	3	4.9%	4
Better security	0.8%	6	1.6%	3	1.5%	2	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Longer opening hours	1.1%	8	1.8%	3	0.0%	0	1.9%	3	0.0%	0	1.1%	2	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better disabled access	0.5%	4	0.3%	1	0.0%	0	0.0%	0	2.4%	1	1.2%	2	0.0%	0
Better range of service outlets	1.9%	14	0.3%	1	2.1%	2	3.0%	4	0.0%	0	2.3%	4	2.5%	2
Fewer charity shops	0.3%	2	0.3%	1	0.0%	0	0.7%	1	0.0%	0	0.3%	1	0.0%	0
Fewer empty shops	0.5%	4	1.5%	3	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Improve congestion / too busy	3.0%	23	5.4%	9	3.6%	4	2.5%	4	3.3%	1	1.7%	3	1.3%	1
More clothes shops	2.2%	17	3.7%	6	5.4%	6	1.7%	3	0.0%	0	0.0%	0	1.8%	2
Weighted base:		745		171		112		149		35		187		92
Sample:		730		164		109		140		57		177		83

Q31 Why don’t you visit any of these Town Centres? [MR]
Those who don't visit any of the centres at Q27

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Lack of choice and range of non-food shops	7.6%	19	25.0%	1	9.3%	2	44.4%	2	0.0%	0	6.7%	7	7.0%	7
Lack of choice and range of food shops	4.5%	12	0.0%	0	14.7%	3	55.5%	3	3.2%	1	1.2%	1	3.5%	3
Choice of leisure facilities (cinema, gym, pubs etc)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Choice of services (hairdressers, banks etc)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Environmental quality of centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Too far away from home	34.6%	89	0.0%	0	24.5%	6	22.2%	1	46.5%	11	37.1%	38	34.1%	33
Too far away from work	1.4%	4	0.0%	0	15.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Not accessible by public transport	3.7%	9	0.0%	0	2.7%	1	11.1%	1	3.7%	1	3.4%	3	4.1%	4
Inconveniently located car parking	0.7%	2	0.0%	0	5.4%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Expensive car parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Traffic congestion	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Health reasons / housebound	3.5%	9	0.0%	0	9.8%	2	0.0%	0	3.7%	1	3.2%	3	2.7%	3
(Nothing, no reason to visit)	47.6%	122	40.5%	2	24.2%	6	33.4%	2	43.1%	10	49.2%	51	53.9%	52
(Don't know)	2.4%	6	34.5%	2	5.4%	1	0.0%	0	4.8%	1	1.9%	2	0.0%	0
Weighted base:		257		6		23		5		23		103		96
Sample:		272		5		20		7		44		100		96

Q32 Instead of these Town Centres, which other larger centres do you usually visit? [MR]

Those who don't visit any of the centres at Q27

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Cambridge	43.7%	112	69.0%	4	21.6%	5	33.3%	2	64.9%	15	76.8%	79	7.4%	7
Bury St Edmunds	27.7%	71	44.0%	2	0.0%	0	11.1%	1	4.8%	1	61.5%	64	3.6%	3
Colchester	9.2%	23	9.5%	1	0.0%	0	0.0%	0	0.0%	0	5.0%	5	18.6%	18
Braintree	22.9%	59	25.0%	1	12.5%	3	33.4%	2	0.0%	0	13.9%	14	40.1%	38
Chelmsford	33.2%	85	0.0%	0	20.6%	5	55.6%	3	0.0%	0	2.8%	3	77.8%	75
Harlow	7.8%	20	50.1%	3	47.8%	11	0.0%	0	9.7%	2	0.0%	0	4.0%	4
Hertford	1.3%	3	0.0%	0	0.0%	0	0.0%	0	4.8%	1	1.6%	2	0.6%	1
Stevenage	5.2%	13	0.0%	0	0.0%	0	0.0%	0	44.8%	10	2.8%	3	0.0%	0
Others	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Basildon	1.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	3
Biggleswade	0.2%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	0	0.0%	0	0.0%	0
Bishop's Stortford	0.4%	1	0.0%	0	0.0%	0	22.2%	1	0.0%	0	0.0%	0	0.0%	0
London	1.7%	4	0.0%	0	0.0%	0	0.0%	0	3.7%	1	0.6%	1	3.0%	3
Cheshunt	0.5%	1	0.0%	0	5.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clacton-on-Sea	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Colchester	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Halstead	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Haverhill	5.0%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.3%	12	1.1%	1
Hitchin	0.2%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	0	0.0%	0	0.0%	0
Letchworth	0.9%	2	0.0%	0	0.0%	0	0.0%	0	10.0%	2	0.0%	0	0.0%	0
Maldon	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Newmarket	2.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	2.4%	2
Romford	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(None)	15.9%	41	31.0%	2	32.3%	8	11.1%	1	26.5%	6	10.3%	11	14.8%	14
Weighted base:		257		6		23		5		23		103		96
Sample:		272		5		20		7		44		100		96

Q33 Which of these activities do you participate in? [MR/PR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Restaurants	72.9%	730	73.7%	130	74.5%	101	84.8%	130	59.0%	34	72.0%	209	66.7%	125
Pub / bars / nightclubs	57.4%	575	59.8%	106	54.2%	73	69.8%	107	52.9%	31	54.1%	157	53.7%	101
(None of these)	19.8%	198	18.5%	33	20.7%	28	10.6%	16	26.8%	16	20.5%	59	24.5%	46
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

Q34 Which centre / facility did you last visit to go to a restaurant?
Restaurants at Q33 AND Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Zone 1														
Arkesden Village Centre, CB11 4EX	0.2%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clavering Village Centre, CB11 4QS	0.4%	3	1.2%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Debden Village Centre, CB11 3LL	0.2%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Chesterford Village Centre, CB10 1NU	0.5%	3	2.2%	3	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Great Sampford Village Centre, CB10 2RL	0.2%	1	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Knight Park, Saffron Walden, CB10 2SG	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Little Walden Village Centre, CB10 1XA	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newport Village Centre, CB11 3PF	0.2%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Radwinter Village Centre, CB10 2SN	0.6%	4	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2
Saffron Walden town centre	14.7%	101	50.7%	62	3.5%	3	1.7%	2	3.9%	1	13.2%	26	5.6%	7
Sparrows End Farm Shop, Sparrows Hill House, Newport, Saffron Walden, CB11 3TU	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wicken Bonhunt Village Centre, CB11 3UG	0.2%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wimbish Village Centre, CB10 2XG	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2														
Elsenham Village Centre, CM22 6EH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hatfield Broad Oak Village Centre, CM22 7HN	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hatfield Heath Village Centre, CM22 7DU	0.7%	5	0.0%	0	5.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hazel End Village Centre, CM23 1HB	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henham Village Centre, CM22 6AS	0.4%	3	0.0%	0	2.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Manuden Village Centre, CM23 1EH	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spellbrook Village Centre, CM22 7SE	0.2%	2	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3														
Aythorpe Roding Village Centre, CM6 1RZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Barnston Village Centre, CM6 1LR	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Felsted Village Centre, CM6 3DJ	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Canfield Village Centre, CM6 1JT	0.2%	2	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Great Dunmow town centre	10.2%	70	0.0%	0	3.7%	4	47.0%	59	0.0%	0	0.0%	0	6.2%	7
High Roding Village Centre, CM6 1PP	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lindsell Village Centre, CM6 3QW	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Little Dunmow Village Centre, CM6 3HT	0.3%	2	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Little Easton Village Centre, CM6 2JN	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Thaxted town centre	1.2%	8	2.7%	3	0.7%	1	2.7%	3	0.0%	0	0.0%	0	0.5%	1
Zone 4														
Barley Village Centre, SG8 8JW	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Chrishall Village Centre, SG8 8NP	0.3%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Fowlmere Village Centre, SG8 7SR	0.4%	3	0.0%	0	0.0%	0	0.0%	0	8.7%	3	0.0%	0	0.0%	0
Great Chishill Village Centre, SG8 8SQ	0.5%	3	0.0%	0	0.0%	0	0.0%	0	9.7%	3	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Nuthampstead Village Centre, SG8 8NB	0.4%	3	1.4%	2	0.0%	0	0.0%	0	3.9%	1	0.0%	0	0.0%	0
Royston town centre	1.0%	7	0.0%	0	0.0%	0	0.0%	0	21.6%	7	0.0%	0	0.0%	0
Zone 5														
Babraham Village Centre, CB22 3AT	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Balsham Village Center, CB21 4DJ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Bartlow Village Centre, CB21 4PY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Haverhill town centre	8.1%	56	0.0%	0	0.0%	0	0.0%	0	0.0%	0	28.8%	56	0.0%	0
Horseheath Village Centre, CB21 4WD	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Linton Village Centre, CB21 4HS	0.3%	2	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Sawston village centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	3	0.0%	0
Sturmer Village Centre, CB9 7XD	0.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	4	1.4%	2
Whittlesford Village Centre, CB22 4NE	0.4%	3	0.4%	1	0.0%	0	0.0%	0	1.3%	0	0.9%	2	0.0%	0
Zone 6														
Cornish Hall End Village Centre, CM7 4HD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Finchingfield Village Centre, CM7 4JS	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2
Great Leighs Village Centre, CM3 1NN	0.9%	6	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	4.7%	6
Great Waltham Village Centre, CM3 1DF	0.6%	4	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	4
Howe Street Village Centre, CM3 1BG	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Littley Green Village Centre, CM3 1BU	0.1%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Rayne Village Centre, CM77 6RQ	0.7%	5	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	2.1%	2
Roxwell Village Centre, CM1 4PD	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Outside Survey Area														
Aldeburgh Town Centre, IP15 5BJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Avington Village Centre, SO21 1DD	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Barkham Village Centre, RG40 4PL	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Barrington Village Centre, CB22 7QX	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Barton Village Centre, CB23 7BG	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Bassingbourn District Centre, SG8 5NJ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0
Beehive Centre Retail Park, Cambridge (Asda, Go Outdoors, Next Home, TK Maxx)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0
Birchanger Village Centre, CM23 5QJ	0.2%	2	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birmingham City Centre, B2 5PG	0.2%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bishops Stortford town centre	7.5%	52	4.6%	6	34.4%	33	7.7%	10	0.0%	0	0.3%	1	2.6%	3
Blackpool Town Centre, FY1 5DY	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Bluewater Shopping Centre, Greenhithe (Apple, Boots, Clarks, Costa, Superdry)	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Boreham Village Centre, CM3 3JJ	0.3%	2	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	1.0%	1
Braintree town centre	3.2%	22	0.0%	0	1.7%	2	4.3%	5	0.0%	0	0.5%	1	11.7%	14
Braintree Village (Freeport Outlet), Charter Way, Braintree (Armarni, Calvin Klein, Clarkes, Costa, M&S Outlet)	2.9%	20	1.1%	1	0.0%	0	5.3%	7	0.0%	0	0.8%	2	8.6%	10
Bray Village Centre, SL6	0.2%	2	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
2AR														
Brentwood Town Centre, CM15 8AT	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Broad Oak Village Centre, CT2 0QH	0.5%	3	0.0%	0	3.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bude Town Centre, EX23 8PJ	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bury Lane Farm Shop, A10, Melbourn, Meldreth, Royston, SG8 6DF	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Bury St Edmunds town centre	1.8%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.5%	13	0.0%	0
Cambridge city centre	9.9%	68	9.2%	11	0.7%	1	0.8%	1	9.7%	3	26.4%	51	0.5%	1
Cambridge Leisure Park, Clifton Road, Cambridge, CB1 7DY	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	2	0.0%	0
Cambridge Retail Park, Cambridge (Nando's, Boots, Homebase, Starbucks)	0.4%	3	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Cavendish Village Centre, CO10 8AG	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London / West End	2.5%	17	3.9%	5	3.0%	3	2.7%	3	3.9%	1	1.5%	3	1.4%	2
Chatham Green Village Centre, CM3 3LE	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Chelmer Village Retail Park, Chelmsford (Next & Next Home, Boots, JD Sport, TK Maxx)	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	4
Chelmsford city centre	6.1%	42	0.0%	0	0.0%	0	9.2%	12	0.0%	0	0.5%	1	24.7%	29
Clacton-on-Sea Town Centre, CO15 1QX	0.1%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Colchester town centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Cressing Village Centre, CM77 8JQ	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Dobbies Garden Centre, Dunsbridge Turnpike, Royston, SG8 6RB	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Docking Village Centre, PE31 8LH	0.2%	2	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Duxford Village Centre, CB33 4RE	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	5	0.0%	0
East Hanningfield Village Centre, CM3 8XB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Elsworth Village Centre, CB23 4JS	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Epping Town Centre, CM16 4AG	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Feering Village Centre, CO5 9QQ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Felixstowe Town Centre, IP11 2AB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Fitzroy Park, Bishops Stortford, CM23 5PP	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Galleyend District Centre, CM2 8NJ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Gosfield Village Centre, CO9 1TP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Great Yarmouth Town Centre, NR30 3LJ	0.4%	3	1.1%	1	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0
Hadleigh Town Centre, IP7 5EF	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Halstead Town Centre, CO0 2DY	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Harkness Roses, The Rose Gardens, Cambridge Road, Hitchin, SG4 0JT	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0
Harlow district centre	0.3%	2	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hatfield Peverel Village Centre, CM3 2HW	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Heybridge Village Centre, CM9 4GD	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Huntingdon Town Centre, PE29 3LF	0.2%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Ingatestone Village Centre, CM4 9DW	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Ipswich Town Centre, IP1 1DT	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Lakeside Retail Park, West Thurrock (Argos, B&M, Currys PC World, The Range)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Leed City Centre, LS1 5HU	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Letchworth Town Centre, SG6 3EW	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Lidgate Village Centre, CB8 9PP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Little Waltham Village Centre, CM3 3LL	0.3%	2	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Long Melford Village Centre, CO10 9JQ	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Loughton Village Centre, IG10 2NH	0.2%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maldon Town Centre, CM9 5PF	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Meldreth Village Centre, SG8 6LB	0.2%	1	0.0%	0	0.0%	0	0.0%	0	3.5%	1	0.0%	0	0.0%	0
Moreton Village Centre, CM5 0LF	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Newlyn Town Centre, TR18 5HW	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Newmarket town cente	0.4%	3	0.4%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Newquay Town Centre, TR7 2NE	0.2%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Northrepps Village Centre, NR27 0LB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Norwich City Centre, NR1 3DD	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Notley Cross District Centre, CM7 7PU	0.4%	3	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	1.0%	1
Nottingham City Centre, NG1 6GD	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Old Harlow District Centre, CM17 0AA	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ongar District Centre, CM5 9JA	0.3%	2	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.5%	1
Phillimore Garden Centre, Cambridge Road, Melbourn, Royston, SG8 6EY	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Potton Town Centre, SG19 2LR	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Rayleigh Town Centre, SS6 7EJ	0.1%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Roaring Meg Retail Park, Stevenage (Argos Boots, Currys, DFS, Smyths)	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Sawbridgeworth Town Centre, CM21 9JN	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scratby District Centre, NR29 3NW	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0
Shepreth Village Centre, SG8 6PS	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Sheringham Town Centre, NR26 8JP	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Sicklesmere Village Centre, IP30 0TH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Slaley Village Centre, NE47 0AB	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Soham Town Centre, CB7 5BH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Southend-on-Sea Town Centre, SS2 6ER	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
St Albans City Centre, AL3 5BH	0.2%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Ives Town Centre, TR26 2HE	0.2%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stansted Mountfitchet village	2.7%	19	0.7%	1	18.4%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
centre														
Stevenage town centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	4.7%	2	0.0%	0	0.0%	0
Stisted District Centre, CM77 8AW	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Sudbury Town Centre, CO10 1JG	0.4%	3	0.0%	0	0.7%	1	0.9%	1	0.0%	0	0.6%	1	0.0%	0
Thirsk Town Centre, YO7 1PL	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Upminster Town Centre, RM14 2AJ	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
West Bergholt Village Centre, CO6 3JX	0.3%	2	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Mersea Town Centre, CO5 8BT	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
White Roding Village Centre, CM5 1RF	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Woodditton Village Centre, CB8 9SW	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Writtle Village Centre, CM1 3DU	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Others														
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.4%	3	0.7%	1	0.0%	0	0.0%	0	2.2%	1	0.5%	1	0.0%	0
Weighted base:		690		123		96		126		33		195		118
Sample:		661		111		88		115		59		182		106

Q35 Which centre / facility did you last visit to go to pubs, bars and nightclubs?
Pub / bars / nightclubs at Q33 AND Excl. Nulls & SFT

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Zone 1														
Arkesden Village Centre, CB11 4EX	0.6%	3	2.6%	3	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clavering Village Centre, CB11 4QS	0.8%	4	4.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Debden Village Centre, CB11 3LL	0.3%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Chesterford Village Centre, CB10 1NU	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Great Sampford Village Centre, CB10 2RL	0.2%	1	0.5%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Hinxton Village Centre, CB10 1QY	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Knight Park, Saffron Walden, CB10 2SG	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Little Walden Village Centre, CB10 1XA	0.6%	3	0.5%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Newport Village Centre, CB11 3PF	1.0%	5	4.2%	4	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Radwinter Village Centre, CB10 2SN	0.7%	4	3.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Saffron Walden town centre	13.7%	72	50.9%	50	0.9%	1	1.1%	1	5.9%	2	10.2%	14	4.6%	4
Wendens Ambo Village Centre, CB11 4JX	0.3%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Widdington Village Centre, CB11 3SG	1.0%	5	4.4%	4	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Wimbish Village Centre, CB10 2XG	0.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2														
Elsenham Village Centre, CM22 6EH	0.4%	2	0.0%	0	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hatfield Broad Oak Village Centre, CM22 7HN	0.2%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hatfield Heath Village Centre, CM22 7DU	0.7%	4	0.0%	0	2.4%	2	2.2%	2	0.0%	0	0.0%	0	0.0%	0
Hazel End Village Centre, CM23 1HB	0.1%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henham Village Centre, CM22 6AS	0.7%	4	0.0%	0	5.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Little Hallingbury Village Centre, CM22 7RD	0.1%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Manuden Village Centre, CM23 1EH	0.1%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sheering Village Centre, CM22 7ND	0.3%	2	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Takeley village centre	0.1%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3														
Aythorpe Roding Village Centre, CM6 1RZ	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Broxted Village Centre, CM6 2BU	0.1%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Felsted Village Centre, CM6 3DJ	0.7%	4	0.0%	0	0.0%	0	2.8%	3	0.0%	0	0.0%	0	1.3%	1
Great Dunmow town centre	9.9%	52	0.0%	0	5.9%	4	48.0%	46	0.0%	0	0.0%	0	2.2%	2
Lindsell Village Centre, CM6 3QW	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Stebbing village centre	0.5%	3	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Thaxted town centre	3.3%	18	1.4%	1	0.0%	0	13.2%	13	0.0%	0	0.0%	0	4.0%	4
Zone 4														
Barley Village Centre, SG8 8JW	0.5%	2	0.0%	0	0.0%	0	0.0%	0	8.4%	2	0.0%	0	0.0%	0
Chrishall Village Centre, SG8 8NP	1.5%	8	1.7%	2	0.0%	0	0.0%	0	12.9%	4	1.9%	3	0.0%	0
Fowlmere Village Centre, SG8 7SR	0.5%	2	0.0%	0	0.0%	0	0.0%	0	8.4%	2	0.0%	0	0.0%	0
Great Chishill Village Centre, SG8 8SQ	0.5%	2	0.0%	0	0.0%	0	0.0%	0	8.4%	2	0.0%	0	0.0%	0
Nuthampstead Village Centre, SG8 8NB	0.2%	1	0.0%	0	0.0%	0	0.0%	0	4.4%	1	0.0%	0	0.0%	0
Royston town centre	2.1%	11	0.0%	0	0.0%	0	0.0%	0	36.5%	11	0.4%	1	0.0%	0
Zone 5														

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Babraham Village Centre, CB22 3AT	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Balsham Village Center, CB21 4DJ	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Bartlow Village Centre, CB21 4PY	0.6%	3	1.5%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0
Haverhill town centre	8.2%	43	1.7%	2	0.0%	0	0.0%	0	0.0%	0	29.5%	42	0.0%	0
Kedington Village Centre, CB9 8QG	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Linton Village Centre, CB21 4HS	0.9%	5	0.0%	0	0.9%	1	0.0%	0	0.0%	0	2.8%	4	0.0%	0
Pampisford Village Centre, CB22 3ER	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Sawston village centre	1.6%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	9	0.0%	0
Steeple Bumpstead Village Centre, CB9 7DG	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	3	0.0%	0
Sturmer Village Centre, CB9 7XD	1.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4	1.8%	2
West Wratting Village Centre, CB21 5NQ	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Whittlesford Village Centre, CB22 4NE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Withersfield Village Centre, CB9 7RX	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Zone 6														
Cornish Hall End Village Centre, CM7 4HD	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Finchingfield Village Centre, CM7 4JS	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Great Bardfield Village Centre, CM7 4QG	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Great Leighs Village Centre, CM3 1NN	0.8%	4	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	3.2%	3
Great Waltham Village Centre, CM3 1DF	2.1%	11	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	11.6%	11
Howe Street Village Centre, CM3 1BG	0.3%	2	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0
Littley Green Village Centre, CM3 1BU	0.5%	3	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	1.2%	1
Panfield Village Centre, CM7 5AQ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Pleshey Village Centre, CM3 1HG	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Rayne Village Centre, CM77 6RQ	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4
Roxwell Village Centre, CM1 4PD	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	3
Wethersfield Village Centre, CM7 4BY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Outside Survey Area														
Aldeburgh Town Centre, IP15 5BJ	0.3%	2	0.0%	0	0.9%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Avington Village Centre, SO21 1DD	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Barrington Village Centre, CB22 7QX	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0
Birchanger Village Centre, CM23 5QJ	0.2%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bishops Stortford town centre	5.0%	26	2.7%	3	22.3%	16	6.4%	6	0.0%	0	0.4%	1	1.2%	1
Boreham Village Centre, CM3 3JJ	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Braintree town centre	2.5%	13	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	12.4%	11
Braintree Village (Freeport Outlet), Charter Way, Braintree (Armarni, Calvin Klein, Clarkes, Costa, M&S Outlet)	0.6%	3	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	2.2%	2
Broad Oak Village Centre, CT2 0QH	0.6%	3	0.0%	0	4.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broomfield Village Centre, CM1 7AU	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	4
Bury St Edmunds town centre	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	5	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Cambridge city centre	5.7%	30	5.2%	5	1.8%	1	0.0%	0	1.5%	0	16.5%	23	0.0%	0
Central London / West End	1.1%	6	2.5%	2	2.4%	2	0.0%	0	0.0%	0	0.9%	1	0.7%	1
Chelmsford city centre	5.2%	27	0.0%	0	0.0%	0	7.7%	7	0.0%	0	0.0%	0	21.8%	20
Cherry Hinton District Centre, CB1 9JP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Claygate Village Centre, KT10 0QY	0.2%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coggeshall Town Centre, CO6 1UH	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Colchester town centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2
Danbury Village Centre, CM3 4NQ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Docking Village Centre, PE31 8LH	0.3%	2	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Duxford Village Centre, CB33 4RE	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	3	0.0%	0
Great Notley Village Centre, CM77 7US	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2
Great Shelford Village Centre, CB22 5LZ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Harlton Village Centre, CB23 1EY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0
Hartest Village Centre, IP29 4DH	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Hemingford Grey Village Centre, PE28 9BJ	0.4%	2	0.0%	0	0.0%	0	0.0%	0	2.6%	1	1.1%	2	0.0%	0
Heybridge Village Centre, CM9 4GD	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Heydon Village Centre, NR11 6RE	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0
Hundon Village Centre, CO10 8EE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Little Waltham Village Centre, CM3 3LL	1.1%	6	2.3%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	2	1.8%	2
Long Melford Village Centre, CO10 9JQ	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Matching Green Village Centre, CM17 0QS	0.1%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Meldreth Village Centre, SG8 6LB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0
Moreton Village Centre, CM5 0LF	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Newmarket town cente	0.2%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Peterborough City Centre, PE1 1AY	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Rochford Town Centre, SS4 1AY	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Slaley Village Centre, NE47 0AB	0.2%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Stansted Mountfitchet village centre	4.7%	25	0.5%	1	31.6%	22	0.0%	0	0.0%	0	0.0%	0	2.2%	2
Stapleford Village Centre, NG9 8AD	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Thetford Town Centre, IP24 2DS	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Ware Town Centre, SG12 9AD	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0
Wells-next-the-Sea Town Centre, NR23 1AG	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0
West Bergholt Village Centre, CO6 3JX	0.3%	2	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Windermere Town Centre, LA23 1EA	0.3%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Worthing Town Centre, BN11 1UR	0.2%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wrestlingworth Village Centre, SG19 2EP	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0
Writtle Village Centre, CM1 3DU	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Others														
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.2%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		527		99		71		95		29		141		92
Sample:		489		89		63		82		50		126		79

GEN Gender of respondent.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Male	37.2%	373	39.5%	70	34.8%	47	39.4%	61	38.0%	22	37.0%	107	35.2%	66
Female	62.8%	629	60.5%	107	65.2%	88	60.6%	93	62.0%	36	63.0%	183	64.8%	122
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

AGE Could I ask how old you are please?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
18 – 24 years	8.9%	89	11.7%	21	7.6%	10	11.1%	17	2.4%	1	8.2%	24	8.6%	16
25 – 34 years	10.0%	100	16.5%	29	4.6%	6	8.6%	13	9.5%	6	8.9%	26	10.8%	20
35 – 44 years	18.3%	183	24.4%	43	23.4%	32	19.9%	31	3.9%	2	14.9%	43	17.4%	33
45 – 54 years	19.6%	196	14.8%	26	17.6%	24	24.0%	37	14.5%	8	22.5%	65	19.0%	36
55 – 64 years	19.4%	194	18.0%	32	19.4%	26	16.3%	25	20.2%	12	22.9%	66	17.7%	33
65+ years	23.8%	238	14.5%	26	27.4%	37	20.2%	31	49.5%	29	22.6%	65	26.6%	50
(Refused)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

QUOTA Zone:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
Zone 1	17.7%	177	100.0%	177	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2	13.5%	135	0.0%	0	100.0%	135	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3	15.3%	154	0.0%	0	0.0%	0	100.0%	154	0.0%	0	0.0%	0	0.0%	0
Zone 4	5.8%	58	0.0%	0	0.0%	0	0.0%	0	100.0%	58	0.0%	0	0.0%	0
Zone 5	29.0%	290	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	290	0.0%	0
Zone 6	18.7%	188	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	188
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

PC Postcode sector:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
CB10 1	2.6%	26	14.6%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CB10 2	5.3%	53	29.8%	53	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CB11 3	4.7%	47	26.6%	47	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CB11 4	5.1%	51	29.1%	51	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CB21 4	4.9%	49	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.0%	49	0.0%	0
CB21 6	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	7	0.0%	0
CB22 3	4.6%	46	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.8%	46	0.0%	0
CB22 4	2.3%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.8%	23	0.0%	0
CB9 0	4.1%	41	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.2%	41	0.0%	0
CB9 7	4.5%	45	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.5%	45	0.0%	0
CB9 8	2.6%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.0%	26	0.0%	0
CB9 9	5.3%	53	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.3%	53	0.0%	0
CM1 4	6.5%	65	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	34.8%	65
CM22 6	3.3%	33	0.0%	0	24.5%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CM22 7	3.1%	31	0.0%	0	23.0%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CM23 1	1.1%	11	0.0%	0	8.0%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CM24 8	6.0%	60	0.0%	0	44.4%	60	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CM3 1	3.3%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.5%	33
CM6 1	5.5%	55	0.0%	0	0.0%	0	35.7%	55	0.0%	0	0.0%	0	0.0%	0
CM6 2	3.7%	37	0.0%	0	0.0%	0	24.2%	37	0.0%	0	0.0%	0	0.0%	0
CM6 3	5.6%	56	0.0%	0	0.0%	0	36.5%	56	0.0%	0	0.0%	0	0.0%	0
CM6 4	0.6%	6	0.0%	0	0.0%	0	3.6%	6	0.0%	0	0.0%	0	0.0%	0
CM7 4	2.5%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.5%	25
CM7 5	4.6%	46	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.6%	46
CM77 6	1.8%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.6%	18
SG8 7	3.3%	33	0.0%	0	0.0%	0	0.0%	0	56.2%	33	0.0%	0	0.0%	0
SG8 8	2.5%	26	0.0%	0	0.0%	0	0.0%	0	43.8%	26	0.0%	0	0.0%	0
Weighted base:		1002		177		135		154		58		290		188
Sample:		1002		169		129		147		101		277		179

Appendix 2:

Data Tabulations

By Q27 (Weighted)

Q27A Which of those centres do you visit most often? [PR]
Those who visit at least one of the centres at Q27

	Total		Saffron Walden		Great Dunmow		Stansted Mountfitchet		Thaxted	
Saffron Walden	59.4%	443	100.0%	443	0.0%	0	0.0%	0	0.0%	0
Great Dunmow	27.1%	202	0.0%	0	100.0%	202	0.0%	0	0.0%	0
Stansted Mountfitchet	9.0%	67	0.0%	0	0.0%	0	100.0%	67	0.0%	0
Thaxted	4.5%	33	0.0%	0	0.0%	0	0.0%	0	100.0%	33
Weighted base:		745		443		202		67		33
Sample:		730		441		187		66		36

Mean score [Times a month]: Daily = 28, At least two times a week = 8, At least once a week = 4, At least once a fortnight = 2, At least once a month = 1, At least every two months = 0.5, At least every 3 months = 0.333, At least every 6 months = 0.166, Less often than once every 6 months = 0.111

Q28A How often do you visit (CENTRE MENTIONED AT Q27A)?
Those who visit at least one of the centres at Q27

	Total		Saffron Walden		Great Dunmow		Stansted Mountfitchet		Thaxted	
Daily	9.1%	68	5.9%	26	8.0%	16	29.8%	20	15.6%	5
At least two times a week	18.1%	135	18.9%	84	15.1%	31	22.5%	15	15.9%	5
At least once a week	21.2%	158	20.8%	92	26.2%	53	15.8%	11	7.3%	2
At least once a fortnight	14.1%	105	12.9%	57	18.1%	37	9.5%	6	15.1%	5
At least once a month	14.9%	111	14.1%	63	15.0%	30	12.7%	8	28.3%	9
At least every two months	6.2%	46	8.3%	37	3.9%	8	0.9%	1	1.8%	1
At least every 3 months	5.9%	44	5.7%	25	6.7%	13	3.4%	2	9.1%	3
At least every 6 months	3.8%	28	4.9%	22	3.2%	6	0.0%	0	0.0%	0
Less often than once every 6 months	3.1%	23	4.4%	19	1.4%	3	0.0%	0	1.8%	1
Have only visited once	0.7%	5	1.0%	4	0.0%	0	0.0%	0	1.8%	1
(Don’t know / varies)	3.0%	23	3.0%	13	2.3%	5	5.4%	4	3.1%	1
Mean:		*5.53*		*4.67*		*5.19*		*11.73*		*6.89*
Weighted base:		745		443		202		67		33
Sample:		730		441		187		66		36

Q28B How do you usually travel to (CENTRE MENTIONED AT Q27A)?
Those who visit at least one of the centres at Q27

	Total		Saffron Walden		Great Dunmow		Stansted Mountfitchet		Thaxted	
Car / van (as driver)	71.8%	535	75.5%	334	73.3%	148	48.1%	32	61.5%	20
Car / van (as passenger)	6.3%	47	7.0%	31	5.7%	11	2.5%	2	9.6%	3
Bus (including the busway or guided bus), minibus or coach	1.4%	10	1.5%	7	0.9%	2	0.0%	0	5.2%	2
Motorcycle, scooter or moped	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Walk	18.7%	140	13.9%	61	19.1%	39	47.6%	32	23.7%	8
Taxi	0.4%	3	0.4%	2	0.0%	0	0.9%	1	0.0%	0
Train	0.1%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0
Bicycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mobility scooter / disability vehicle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.2%	9	1.5%	7	1.0%	2	0.0%	0	0.0%	0
Weighted base:		745		443		202		67		33
Sample:		730		441		187		66		36

Q29 What do you like most about (CENTRE MENTIONED AT Q27A)?

Those who visit at least one of the centres at Q27

	Total		Saffron Walden		Great Dunmow		Stansted Mountfitchet		Thaxted	
Choice and range of shops	31.3%	233	35.0%	155	30.2%	61	24.0%	16	3.6%	1
Strength of supermarket provision	0.7%	5	0.9%	4	0.0%	0	1.9%	1	0.0%	0
Choice of leisure facilities (restaurants, pubs etc)	4.4%	33	3.9%	17	3.9%	8	5.6%	4	12.1%	4
Choice of services (hairdressers, banks etc)	2.3%	17	0.9%	4	5.1%	10	3.8%	3	0.0%	0
Environmental quality of centre	17.2%	128	19.9%	88	11.4%	23	8.7%	6	33.0%	11
Close to home	14.0%	105	8.4%	37	17.8%	36	30.4%	20	33.4%	11
Close to work	0.6%	5	0.2%	1	0.0%	0	3.9%	3	3.3%	1
Easily accessible by public transport	0.2%	1	0.1%	1	0.0%	0	0.9%	1	0.0%	0
Convenient car parking	2.8%	21	3.3%	14	2.0%	4	3.4%	2	0.0%	0
Free car parking	0.2%	1	0.2%	1	0.3%	1	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Close to friends / family	1.5%	11	1.0%	4	3.0%	6	0.0%	0	1.9%	1
Compact centre / easy to get around	3.1%	23	2.6%	11	4.3%	9	0.0%	0	8.0%	3
Familiarity / habit	0.6%	5	0.7%	3	0.9%	2	0.0%	0	0.0%	0
Nice atmosphere / friendly people	3.2%	24	1.8%	8	4.8%	10	8.3%	6	1.7%	1
Quiet / not too busy	1.8%	14	1.9%	8	1.7%	3	2.5%	2	0.0%	0
The market	4.1%	30	6.1%	27	1.6%	3	0.0%	0	0.0%	0
The pedestrianisation	0.2%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0
(Nothing in particular)	12.0%	89	12.9%	57	13.2%	27	6.5%	4	3.0%	1
Weighted base:		745		443		202		67		33
Sample:		730		441		187		66		36

Q30 Are there any measures that would encourage you to visit (CENTRE MENTIONED AT Q27A) more often?

Those who visit at least one of the centres at Q27

1st mention

	Total		Saffron Walden		Great Dunmow		Stansted Mountfitchet		Thaxted	
Increased general choice and range of shops	15.0%	112	11.9%	53	26.1%	53	9.9%	7	0.0%	0
Improved food shops within the town centre	1.2%	9	0.3%	2	3.0%	6	2.6%	2	0.0%	0
Discount foodstores within the town centre	0.6%	4	0.3%	1	1.1%	2	0.9%	1	0.0%	0
Improved non-food shops within the town centre	2.7%	20	1.9%	8	4.6%	9	3.3%	2	0.0%	0
Improved leisure facilities	3.2%	24	2.7%	12	5.3%	11	0.0%	0	3.6%	1
Improved quality of shops	0.5%	4	0.8%	3	0.3%	1	0.0%	0	0.0%	0
More parking	8.3%	62	9.2%	41	8.1%	16	4.4%	3	6.0%	2
Cheaper parking	5.7%	43	6.0%	27	6.0%	12	5.8%	4	0.0%	0
Improved street cleaning	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Increased public transport	1.5%	11	1.4%	6	1.5%	3	2.5%	2	0.0%	0
Cheaper public transport	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better environment	2.7%	20	3.0%	13	2.7%	6	0.9%	1	1.7%	1
Better security	0.6%	5	0.3%	1	0.6%	1	2.5%	2	1.7%	1
Longer opening hours	0.4%	3	0.3%	1	0.9%	2	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better disabled access	0.5%	4	0.8%	4	0.0%	0	0.0%	0	0.0%	0
Better range of service outlets	1.3%	10	0.9%	4	1.5%	3	3.5%	2	1.7%	1
Fewer charity shops	0.2%	2	0.1%	1	0.5%	1	0.0%	0	0.0%	0
Fewer empty shops	0.3%	2	0.2%	1	0.5%	1	0.0%	0	0.0%	0
Improve congestion / too busy	2.0%	15	2.4%	11	1.1%	2	1.9%	1	1.7%	1
More clothes shops	1.7%	12	1.1%	5	2.9%	6	2.5%	2	0.0%	0
(Nothing / Nothing else)	46.3%	345	50.2%	222	30.0%	61	54.5%	36	75.6%	25
(Don't know)	5.3%	39	6.1%	27	3.3%	7	4.0%	3	7.9%	3
Weighted base:		745		443		202		67		33
Sample:		730		441		187		66		36

	Total		Saffron Walden		Great Dunmow		Stansted Mountfitchet		Thaxted	
2nd mention										
Increased general choice and range of shops	2.9%	22	3.0%	13	3.3%	7	1.9%	1	1.8%	1
Improved food shops within the town centre	3.1%	23	1.4%	6	6.2%	12	6.7%	4	0.0%	0
Discount foodstores within the town centre	0.2%	2	0.0%	0	0.8%	2	0.0%	0	0.0%	0
Improved non-food shops within the town centre	2.1%	16	1.7%	8	4.2%	8	0.0%	0	0.0%	0
Improved leisure facilities	1.0%	8	1.1%	5	0.8%	2	1.9%	1	0.0%	0
Improved quality of shops	1.8%	13	1.4%	6	3.1%	6	0.9%	1	0.0%	0
More parking	1.8%	13	1.4%	6	3.6%	7	0.0%	0	0.0%	0
Cheaper parking	2.6%	19	2.0%	9	4.7%	9	1.9%	1	0.0%	0
Improved street cleaning	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Increased public transport	0.5%	3	0.3%	1	1.0%	2	0.0%	0	0.0%	0
Cheaper public transport	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better environment	1.0%	8	1.2%	6	0.8%	2	0.0%	0	1.7%	1
Better security	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Longer opening hours	0.7%	5	0.8%	4	0.6%	1	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better range of service outlets	0.6%	4	0.2%	1	1.6%	3	0.0%	0	0.0%	0
Fewer charity shops	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0
Fewer empty shops	0.2%	2	0.4%	2	0.0%	0	0.0%	0	0.0%	0
Improve congestion / too busy	1.1%	8	1.2%	5	0.5%	1	2.5%	2	0.0%	0
More clothes shops	0.6%	4	0.7%	3	0.5%	1	0.0%	0	0.0%	0
(Nothing / Nothing else)	71.5%	533	74.7%	331	60.3%	122	75.8%	51	88.5%	29
(Don't know)	8.3%	62	8.2%	36	8.3%	17	8.5%	6	7.9%	3
Weighted base:		745		443		202		67		33
Sample:		730		441		187		66		36
3rd mention										
Increased general choice and range of shops	0.8%	6	0.3%	1	2.1%	4	0.9%	1	0.0%	0
Improved food shops within the town centre	0.2%	1	0.0%	0	0.3%	1	0.9%	1	0.0%	0
Discount foodstores within the town centre	0.1%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0
Improved non-food shops within the town centre	1.3%	10	1.0%	4	2.6%	5	0.9%	1	0.0%	0
Improved leisure facilities	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Improved quality of shops	0.5%	4	0.2%	1	1.3%	3	0.0%	0	0.0%	0
More parking	0.8%	6	1.1%	5	0.6%	1	0.0%	0	0.0%	0
Cheaper parking	0.6%	5	1.0%	5	0.0%	0	0.0%	0	0.0%	0
Improved street cleaning	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Increased public transport	0.2%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Cheaper public transport	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better environment	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Better security	0.2%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Longer opening hours	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better range of service outlets	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fewer charity shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fewer empty shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improve congestion / too busy	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More clothes shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing / Nothing else)	84.0%	626	84.2%	373	82.0%	166	86.0%	57	90.2%	30
(Don't know)	10.9%	82	11.9%	53	9.4%	19	10.3%	7	9.8%	3
Weighted base:		745		443		202		67		33
Sample:		730		441		187		66		36

	Total		Saffron Walden		Great Dunmow		Stansted Mountfitchet		Thaxted	
Any mention										
Increased general choice and range of shops	18.8%	140	15.2%	67	31.5%	64	12.7%	8	1.8%	1
Improved food shops within the town centre	4.5%	34	1.8%	8	9.4%	19	10.2%	7	0.0%	0
Discount foodstores within the town centre	0.8%	6	0.3%	1	2.1%	4	0.9%	1	0.0%	0
Improved non-food shops within the town centre	6.1%	46	4.5%	20	11.3%	23	4.2%	3	0.0%	0
Improved leisure facilities	4.4%	33	3.8%	17	6.6%	13	1.9%	1	3.6%	1
Improved quality of shops	2.8%	21	2.4%	11	4.7%	9	0.9%	1	0.0%	0
More parking	11.0%	82	11.7%	52	12.2%	25	4.4%	3	6.0%	2
Cheaper parking	8.9%	67	9.0%	40	10.7%	22	7.7%	5	0.0%	0
Improved street cleaning	0.2%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Increased public transport	2.1%	15	1.7%	8	3.1%	6	2.5%	2	0.0%	0
Cheaper public transport	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better environment	3.9%	29	4.3%	19	4.0%	8	0.9%	1	3.5%	1
Better security	0.8%	6	0.6%	3	0.6%	1	2.5%	2	1.7%	1
Longer opening hours	1.1%	8	1.2%	5	1.4%	3	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better disabled access	0.5%	4	0.8%	4	0.0%	0	0.0%	0	0.0%	0
Better range of service outlets	1.9%	14	1.1%	5	3.1%	6	3.5%	2	1.7%	1
Fewer charity shops	0.3%	2	0.3%	1	0.5%	1	0.0%	0	0.0%	0
Fewer empty shops	0.5%	4	0.6%	3	0.5%	1	0.0%	0	0.0%	0
Improve congestion / too busy	3.0%	23	3.6%	16	1.6%	3	4.4%	3	1.7%	1
More clothes shops	2.2%	17	1.8%	8	3.4%	7	2.5%	2	0.0%	0
Weighted base:		745		443		202		67		33
Sample:		730		441		187		66		36

Appendix 3:

Sample Questionnaire

JN 080821
Uttlesford Dictrict Council - Retail Capacity Study

Good morning / afternoon / evening, I am …… from NEMS market research, an independent market research company, and we are conducting a short survey in your area on behalf of Uttlesford District Council about shopping habits. Do you have time to answer some questions please? It will take about 5-6 minutes.

QA **Are you the person responsible for the main food shopping in your household?**

Yes
No

IF 'YES' – CONTINUE INTERVIEW.

IF 'NO' – ASK, COULD I SPEAK TO THE PERSON WHO IS RESPONSIBLE FOR MOST OF THE FOOD SHOPPING, IF NOT AVAILABLE THANK AND CLOSE INTERVIEW

Preface for the Convenience questions

READ OUT: In order to determine typical shopping patterns; on the following questions please EXCLUDE any unusual or special shopping trips you may have made due to the current COVID 19 situation.

Q01 **At which store do you usually undertake your main food and grocery shopping?**
DO NOT READ OUT. ONE ANSWER ONLY.

#Conveni Convenience List — CLOSE IF 'DON'T DO' OR 'DON'T KNOW'

ASKED TO THOSE WHO SAID "INTERNET / DELIVERY" AT Q01

Q02 **Which retailer do you purchase your main food internet / home delivery shopping from?**
DO NOT READ OUT. ONE ANSWER ONLY.

1 Asda
2 Iceland
3 Sainsbury's
4 Tesco
5 Morrisons
6 Ocado
7 Other (PLEASE WRITE IN)
8 (Don't know / varies)

Q03 **What is the main reason you choose …. (STORE MENTIONED AT Q01) for your main food and grocery shopping?**

DO NOT READ OUT. ONE ANSWER ONLY

1 Accessibility by public transport
2 Car parking prices
3 Car parking provision
4 Choice of food goods available
5 Choice of shops nearby selling non-food goods
6 Choice of shops selling food goods
7 Cleanliness
8 Delivery service
9 Easy to get to by car
A Entertainment / events
B Good internal layout
C Good service / friendly staff
D Habit / always use it / preference for retailer
E Internet shopping is convenient
F Lower prices
G Loyalty card / points scheme
H Near to home
I Near to work
J Nice shopping environment
K Only one in the area / no other choice
L Provision of leisure facilities nearby
M Provision of services nearby, such as banks and other financial services
N Public information, signposts and public facilities
O Quality of food goods available
P Quality of shops selling food goods
Q Safety (during the day)
R Safety (during the evening / night time)
S Staff discount / work there
T Value for money
U Other (PLEASE WRITE IN)
V (Don't know / no reason in particular)

Q04 **What, if anything, is the one thing you most dislike about …. (STORE MENTIONED AT Q01) ?**
DO NOT READ OUT. ONE ANSWER ONLY

1	Change layout too often
2	Expensive parking
3	Difficult to get to
4	Expensive
5	Lack of cycle parking
6	Difficult to park / lack of parking
7	Lack of public transport
8	Limited range of goods
9	No petrol station
A	Poor internal layout
B	Poor quality
C	Preference for retailer
D	Staff rude / unhelpful
E	Too busy
F	Too far away
G	Too small
H	Other (PLEASE WRITE IN)
I	(Don't know)
J	(Nothing)

Q05 **How often do you normally do your main food shopping at …. (STORE MENTIONED AT Q01?)**
DO NOT READ OUT. ONE ANSWER ONLY. PROMPT IF NECESSARY

1	Daily
2	At least two times a week
3	At least once a week
4	At least once a fortnight
5	At least once a month
6	At least every two months
7	Less often
8	Have only visited once
9	(Don't know / varies)

NOT ASKED TO THOSE WHO SAID "INTERNET / DELIVERY" AT Q01

Q06 **How do you normally travel to …. (STORE MENTIONED AT Q01)?**
DO NOT READ OUT. ONE ANSWER ONLY.

1	Car / van (as driver)
2	Car / van (as passenger)
3	Bus (including the busway or guided bus), minibus or coach
4	Motorcycle, scooter or moped
5	Walk
6	Taxi
7	Train
8	Metro
9	Bicycle
A	Mobility scooter / disability vehicle
B	Other (PLEASE WRITE IN)
C	(Don't know / varies)

NOT ASKED TO THOSE WHO SAID "INTERNET / DELIVERY" AT Q01

Q07 **How long did your last journey to …. (STORE MENTIONED AT Q01) take?**
DO NOT PROMPT. ONE ANSWER ONLY.

X	Amount of time taken to nearest whole minute (PLEASE WRITE IN)
Y	(Don't know / can't remember)
Z	(Refused)

Q08 **How much on average does your household normally spend on main food and grocery shopping in a week?**
DO NOT PROMPT. ONE ANSWER ONLY.

X	To the nearest £: (PLEASE WRITE IN)
Y	(Don't know / varies)
Z	(Refused)

NOT ASKED TO THOSE WHO SAID "INTERNET / DELIVERY" AT Q01

Q09 **When you go main food shopping is your trip linked with any other activity?**
DO NOT PROMPT. ONE ANSWER ONLY. IF RESPONDENT STATES MORE THAN ONE ANSWER - TAKE THEIR FIRST ANSWER

1	Yes – NON-FOOD shopping	**GO TO Q10**
2	Yes – other FOOD shopping	**GO TO Q10**
3	Yes – visiting services such as banks and other financial institutions	**GO TO Q10**
4	Yes – leisure activity	GO TO Q11
5	Yes – travelling to/from work	GO TO Q11
6	Yes – travelling to/from school/college/university	GO TO Q11
7	Yes – getting petrol	GO TO Q11
8	Yes – visiting café / pub / restaurant	GO TO Q11
9	Yes – visiting family/friends	GO TO Q11
A	Yes – visiting health service such as doctor, dentist, hospital	GO TO Q11
B	Yes – visiting other service such as laundrette, hairdresser, recycling	GO TO Q11
C	Yes – other activity (PLEASE WRITE IN)	GO TO Q11
D	(No activity)	GO TO Q11
E	(Don't know / varies)	GO TO Q11

ASK THOSE WHO SAID YES TO: "NON-FOOD", "OTHER FOOD" OR "SERVICES" AT Q9 OTHERS GO TO Q11

Q10 **Where do you do this linked trip?**
DO NOT PROMPT. ONE ANSWER ONLY. IF IN STORE IN A SUPERMARKET WRITE IN NAME OF SUPERMARKET AND TOWN.

#Compari Comparison List

Q11 **Do you make 'top up' shopping trips in between your main food shopping trip? Top up grocery shopping includes 'basket shops' in foodstores, purchases from speciality retailers such as bakers, butchers and greengrocers, and snacks bought from shops.**
DO NOT READ OUT. ONE ANSWER ONLY.

1	Yes	GO TO Q12
2	No	GO TO LOCK1

ASKED TO THOSE WHO DO TOP UP SHOPPING AT Q11

Q12 **Where ddo you usually undertake your 'top up' shopping?**
DO NOT READ OUT. ONE ANSWER ONLY.

#Conveni Convenience List

ASKED TO THOSE WHO DO TOP UP SHOPPING AT Q11

Q13 **How often do you make 'top up' shopping trips to …. (STORE MENTIONED AT Q12)?**
DO NOT READ OUT. ONE ANSWER ONLY.

1 Daily
2 At least two times a week
3 At least once a week
4 At least once a fortnight
5 At least once a month
6 At least every two months
7 Less often
8 Have only visited once
9 (Don't know / varies)

ASKED TO THOSE WHO DO TOP UP SHOPPING AT Q11

Q14 **Thinking more generally, how much does your household spend on average on 'top up' food and grocery shopping in a week? Once again, top up grocery shopping includes 'basket shops' in foodstores, purchases from speciality retailers such as bakers, butchers and greengrocers, and snacks bought from shops.**
DO NOT READ OUT. ONE ANSWER ONLY.

X To the nearest £: (PLEASE WRITE IN)
Y (Don't know / varies)
Z (Refused)

New questions to see how internet shopping has changed and may change post Covid

READ OUT: Now thinking about online grocery shopping before, during and after the covid lockdown.

LOCK1 **BEFORE the Covid lockdown how often were you shopping online for groceries?**
DO NOT PROMPT. ONE ANSWER ONLY.

1 Daily
2 4-6 days a week
3 2-3 days a week
4 One day a week
5 Every two weeks
6 Every three weeks
7 Monthly
8 Once every two months
9 Three-four times a year
A Twice a year
B Once a year
C Less often
D Never
E (Don't know)
F (Varies)

LOCK2 **DURING the Covid lockdown how often did you shop online for groceries?**
DO NOT PROMPT. ONE ANSWER ONLY.

1 Daily
2 4-6 days a week
3 2-3 days a week
4 One day a week
5 Every two weeks
6 Every three weeks
7 Monthly
8 Once every two months
9 Three-four times a year
A Twice a year
B Once a year
C Less often
D Never
E (Don't know)
F (Varies)

Using the data from LOCK2 compared to LOCK1 we will be able to create the question below:

QA **Online grocery shopping DURING lockdown compared to BEFORE lockdown:**

1 More
2 Same
3 Less
4 (Don't know /varies)

LOCK3 **NOW THAT the lockdown is lifted, how often do you think you will be shopping online for groceries?**
DO NOT PROMPT. ONE ANSWER ONLY.

1	Daily
2	4-6 days a week
3	2-3 days a week
4	One day a week
5	Every two weeks
6	Every three weeks
7	Monthly
8	Once every two months
9	Three-four times a year
A	Twice a year
B	Once a year
C	Less often
D	Never
E	(Don't know)
F	(Varies)

Using the data from LOCK3 compared to LOCK2 we will be able to create the question below:
QB **Online grocery shopping AFTER lockdown compared to DURING lockdown:**

1	More
2	Same
3	Less
4	(Don't know /varies)

Using the data from LOCK3 compared to LOCK1 we will be able to create the question below:
QC **Online grocery shopping AFTER lockdown compared to BEFORE lockdown:**

1	More
2	Same
3	Less
4	(Don't know /varies)

Preface for Comparison questions

READ OUT: We now have a few questions about where you go for non-food shopping. In answering these questions, the location may be a town centre, a retail park, a free-standing store, or it could be facilities such as the internet, TV shopping or catalogue. Again, please EXCLUDE any unusual or special shopping trips you may have made due to the current COVID 19 situation.

Q15 **Where do you usually buy clothing or footwear goods?**
DO NOT PROMPT. ONE ANSWER ONLY. IF IN STORE IN A SUPERMARKET WRITE IN NAME OF SUPERMARKET AND TOWN.

#Compari Comparison List

Q16 **Where do you usually buy books, CDs, DVDs?**
DO NOT PROMPT. ONE ANSWER ONLY. IF IN STORE IN A SUPERMARKET WRITE IN NAME OF SUPERMARKET AND TOWN.

#Compari Comparison List

Q17 **Where do you usually buy small household goods such as home furnishings, jewellery, glass and china items?**

DO NOT PROMPT. ONE ANSWER ONLY. IF IN STORE IN A SUPERMARKET WRITE IN NAME OF SUPERMARKET AND TOWN.

#Compari Comparison List

Q18 **Where do you normally buy goods such as toys, games, bicycles and recreational goods?**
DO NOT PROMPT. ONE ANSWER ONLY. IF IN STORE IN A SUPERMARKET WRITE IN NAME OF SUPERMARKET AND TOWN.

#Compari Comparison List

Q19 **Where do you normally buy chemist goods (including health and beauty products)?**
DO NOT PROMPT. ONE ANSWER ONLY. IF IN STORE IN A SUPERMARKET WRITE IN NAME OF SUPERMARKET AND TOWN.

#Compari Comparison List

Q20 **Where do you normally electrical items, such as televisions, washing machines and computers?**
DO NOT PROMPT. ONE ANSWER ONLY. IF IN STORE IN A SUPERMARKET WRITE IN NAME OF SUPERMARKET AND TOWN.

#Compari Comparison List

Q21 **Where do you normally buy DIY or gardening goods?**
DO NOT PROMPT. ONE ANSWER ONLY. IF IN STORE IN A SUPERMARKET WRITE IN NAME OF SUPERMARKET AND TOWN.

#Compari Comparison List

Q22 **Where do you normally buy furniture, carpets and floor coverings?**
DO NOT PROMPT. ONE ANSWER ONLY. IF IN STORE IN A SUPERMARKET WRITE IN NAME OF SUPERMARKET AND TOWN.

#Compari Comparison List

New questions to see how internet shopping has changed and may change post Covid

READ OUT: Now continuing to think about non-food shopping online before, during and after the covid lockdown.

LOCK4 BEFORE the Covid lockdown how often were you doing non-food shopping online?
DO NOT PROMPT. ONE ANSWER ONLY.

1	Daily
2	4-6 days a week
3	2-3 days a week
4	One day a week
5	Every two weeks
6	Every three weeks
7	Monthly
8	Once every two months
9	Three-four times a year
A	Twice a year
B	Once a year
C	Less often
D	Never
E	(Don't know)
F	(Varies)

LOCK5 DURING the Covid lockdown how often were you doing non-food shopping online?
DO NOT PROMPT. ONE ANSWER ONLY.

1	Daily
2	4-6 days a week
3	2-3 days a week
4	One day a week
5	Every two weeks
6	Every three weeks
7	Monthly
8	Once every two months
9	Three-four times a year
A	Twice a year
B	Once a year
C	Less often
D	Never
E	(Don't know)
F	(Varies)

Using the data from LOCK5 compared to LOCK4 we will be able to create the question below:

QD Non-food shopping online DURING lockdown compared to BEFORE lockdown:

1	More
2	Same
3	Less
4	(Don't know /varies)

LOCK6 NOW THAT the lockdown is lifted, how often do you think you will be doing non-food shopping online?
DO NOT PROMPT. ONE ANSWER ONLY.

1	Daily
2	4-6 days a week
3	2-3 days a week
4	One day a week
5	Every two weeks
6	Every three weeks
7	Monthly
8	Once every two months
9	Three-four times a year
A	Twice a year
B	Once a year
C	Less often
D	Never
E	(Don't know)
F	(Varies)

Using the data from LOCK6 compared to LOCK5 we will be able to create the question below:

QE Non-food shopping online AFTER lockdown compared to DURING lockdown:

1	More
2	Same
3	Less
4	(Don't know /varies)

Using the data from LOCK6 compared to LOCK4 we will be able to create the question below:

QF Non-food shopping online AFTER lockdown compared to BEFORE lockdown:

1	More
2	Same
3	Less
4	(Don't know /varies)

Q23 Which of the following forms of shopping do you carry out?
READ OUT. CAN BE MULTICODED

1	Internet	
2	Portable internet shopping (through mobile phone)	
3	TV Shopping	
4	(None of these)	GO TO Q27

Q24 **Which goods or services do you currently purchase via Internet or TV shopping?**
DO NOT READ OUT. CAN BE MULTICODED

1 Baby items
2 Banking / finance
3 Books
4 CDs, DVDs, Vinyl (physical products)
5 Clothes / shoes
6 Computer / printer accessories
7 Console / PC games
8 Cosmetics / health / beauty / chemist goods
9 Craft / hobby items (including stationary)
A DIY / hardware goods
B Domestic electrical appliances (white goods)
C Downloadable content (e.g. music / movies / tv / games / apps)
D Food / groceries
E Furniture / soft furnishings / floor coverings / carpets
F Garden items
G Gifts
H Holiday and / or Travel / Event Tickets
I Insurance
J Jewellery
K Mobile phone accessories
L Musical instruments / accessories
M Pet food / products
N Small electrical items (e.g. kettles / toasters / hairdryers etc)
O Small household goods
P Sports goods
Q Toys
R TVs, Hi-Fi's, computers
S Vehicle parts
T Vehicles
U Other (PLEASE WRITE IN)
V (Don't know)

Q25 **Excluding what you've already mentioned - Which other goods or services are you likely to purchase in the future via Internet or TV shopping?**
DO NOT READ OUT. CAN BE MULTICODED

1 Baby items
2 Banking / finance
3 Books
4 CDs, DVDs, Vinyl (physical products)
5 Clothes / shoes
6 Computer / printer accessories
7 Console / PC games
8 Cosmetics / health / beauty / chemist goods
9 Craft / hobby items (including stationary)
A DIY / hardware goods
B Domestic electrical appliances (white goods)
C Downloadable content (e.g. music / movies / tv / games / apps)
D Food / groceries
E Furniture / soft furnishings / floor coverings / carpets
F Garden items
G Gifts
H Holiday and / or Travel / Event Tickets
I Insurance
J Jewellery
K Mobile phone accessories
L Musical instruments / accessories
M Pet food / products
N Small electrical items (e.g. kettles / toasters / hairdryers etc)
O Small household goods
P Sports goods
Q Toys
R TVs, Hi-Fi's, computers
S Vehicle parts
T Vehicles
U Other (PLEASE WRITE IN)
V (Don't know)
W (Nothing new / same goods as I currently am)

Q26A	**For your last Internet or TV order, how did you receive your goods?** DO NOT READ OUT. ONE ANSWER ONLY.	
1	Collection at store	GO TO Q27
2	Home delivery	GO TO Q27
3	Delivery to place of work	GO TO Q27
4	Collection at click and collect hub	**GO TO Q26B**
5	Collection at other location	GO TO Q27
6	(Don't know / varies)	GO TO Q27
	ASKED TO THOSE WHO SAID "COLLECTION AT CLICK AND COLLECT HUB" AT Q26A	
Q26B	**Which click and collect hub did you collect your order from?** DO NOT READ OUT. ONE ANSWER ONLY.	
1	Full name and address of collection hub: (PLEASE WRITE IN)	
	Qualitative questions concening the town centres	
	READ OUT: I would now like to ask you some questions about your views on certain Town Centres as a place for shopping, leisure activities, and using other other town centre services. Again please state how you acted before the covid lockdown started.	
Q27	**Do you ever visit the following Centres?** READ OUT. CAN BE MULTICODED.	
1	Saffron Walden	
2	Great Dunmow	
3	Stansted Mountfitchet	
4	Thaxted	
5	(Do not visit any of these centres)	GO TO Q31
	Asked to those who mentioned more than one centre at Q27	
Q27A	**Which of those centres do you visit most often?** READ OUT. ONE ANSWER ONLY.	
1	Saffron Walden	
2	Great Dunmow	
3	Stansted Mountfitchet	
4	Thaxted	
Q28A	**How often do you visit (CENTRE MENTIONED AT Q27A)?** DO NOT READ OUT. ONE ANSWER ONLY.	
1	Daily	
2	At least two times a week	
3	At least once a week	
4	At least once a fortnight	
5	At least once a month	
6	At least every two months	
7	At least every 3 months	
8	At least every 6 months	
9	Less often than once every 6 months	
A	Have only visited once	
B	(Don't know / varies)	
Q28B	**How do you usually travel to (CENTRE MENTIONED AT Q27A)?** DO NOT READ OUT. ONE ANSWER ONLY.	
1	Car / van (as driver)	
2	Car / van (as passenger)	
3	Bus (including the busway or guided bus), minibus or coach	
4	Motorcycle, scooter or moped	
5	Walk	
6	Taxi	
7	Train	
8	Bicycle	
A	Mobility scooter / disability vehicle	
B	Other (PLEASE WRITE IN)	
C	(Don't know / varies)	
Q29	**What do you like most about (CENTRE MENTIONED AT Q27A)?** DO NOT READ OUT. ONE ANSWER ONLY.	
1	Choice and range of shops	
2	Strength of supermarket provision	
3	Choice of leisure facilities (restaurants, pubs etc)	
4	Choice of services (hairdressers, banks etc)	
5	Environmental quality of centre	
6	Close to home	
7	Close to work	
8	Easily accessible by public transport	
9	Convenient car parking	
A	Free car parking	
B	Other (PLEASE WRITE IN)	
C	(Nothing in particular)	

Q30	**Are there any measures that would encourage you to visit (CENTRE MENTIONED AT Q27A) more often?** DO NOT PROMPT. CODE FIRST 3 MENTIONS	
	1st Mention | 2nd Mention | 3rd Mention	
1	Increased general choice and range of shops	GO TO Q33
2	Improved food shops within the town centre	GO TO Q33
3	Discount foodstores within the town centre	GO TO Q33
4	Improved non-food shops within the town centre	GO TO Q33
5	Improved leisure facilities	GO TO Q33
6	Improved quality of shops	GO TO Q33
7	More parking	GO TO Q33
8	Cheaper parking	GO TO Q33
9	Improved street cleaning	GO TO Q33
A	Increased public transport	GO TO Q33
B	Cheaper public transport	GO TO Q33
C	Better environment	GO TO Q33
D	Better security	GO TO Q33
E	Longer opening hours	GO TO Q33
F	Other (PLEASE WRITE IN)	GO TO Q33
G	(Nothing / Nothing else)	GO TO Q33
H	(Don't know)	GO TO Q33
	ASK THOSE WHO DON'T VISIT ANY TOWN CENTRE AT Q27	
Q31	**Why don't you visit any of these Town Centres?** DO NOT READ OUT. CAN BE MULTICODED	
1	Lack of choice and range of non-food shops	
2	Lack of choice and range of food shops	
3	Choice of leisure facilities (cinema, gym, pubs etc)	
4	Choice of services (hairdressers, banks etc)	
5	Environmental quality of centre	
6	Too far away from home	
7	Too far away from work	
8	Not accessible by public transport	
9	Inconveniently located car parking	
A	Expensive car parking	
B	Traffic congestion	
C	Other (PLEASE WRITE IN)	
D	(Nothing, no reason to visit)	
E	(Don't know)	
	ASK THOSE WHO DON'T VISIT ANY CENTRES AT Q27	
Q32	**Instead of these Town Centre's, which other larger centres do you usually visit?** CAN BE MULTICODED.	
1	Cambridge	
2	Bury St Edmunds	
3	Colchester	
4	Braintree	
5	Chelmsford	
6	Harlow	
7	Hertford	
8	Stevenage	
9	Others (PLEASE WRITE IN)	
A	(None)	
	READ OUT: We now have a few questions about food and beverage trips.	
Q33	**Which of these activities do you participate in?** READ OUT. CAN BE MULTICODED.	
1	Restaurants	ASK Q34
2	Pub / bars / nightclubs	ASK Q35
3	(None of these)	GO TO Q36
	ASKED TO THOSE WHO GO TO RESTAURANTS AT Q33	
Q34	**Which centre / facility did you last visit to go to a restaurant?** DO NOT PROMPT. ONE ANSWER ONLY.	
#Social	Social List	
	ASKED TO THOSE WHO GO TO PUB, BARS OR NIGHTCLUBS AT Q33	
Q35	**Which centre / facility did you last visit to go to pubs, bars and nightclubs?** DO NOT PROMPT. ONE ANSWER ONLY.	
#Social	Social List	
Q36	**Thank you very much for taking part, your answers have been very helpful. We have another similar survey coming up in the next month or so, would you be willing to participate again?** DO NOT PROMPT. ONE ANSWER ONLY.	
1	Yes	
2	No	

GEN **Gender of respondent.**
DO NOT READ OUT. CODE FROM OBSERVATION

1 Male
2 Female

AGE **Could I ask how old you are please?**
DO NOT READ OUT. ONE ANSWER ONLY.

1 18 – 24 years
2 25 – 34 years
3 35 – 44 years
4 45 – 54 years
5 55 – 64 years
6 65+ years
7 (Refused)

Thank & close.

Appendix C: Statistical Tables

Uttlesford Retail Capacity Study
Nexus Planning

Table 1: Population and convenience goods expenditure per capita

Zone	Population					Per capita expenditure (£) Convenience						
	2021	2025	2030	2035	2040	*2019 inc SfT*	*2019*	2021	2025	2030	2035	2040
1 | Uttesford North	35,214	36,537	37,927	39,064	40,103	*2,444*	*2,341*	2,352	2,343	2,324	2,324	2,329
2 | Uttlesford West	27,042	28,319	29,733	30,876	31,935	*2,329*	*2,232*	2,242	2,233	2,215	2,215	2,220
3 | Uttlesford East	30,692	32,004	33,381	34,486	35,518	*2,389*	*2,289*	2,300	2,290	2,272	2,272	2,277
4 | Western Fringe	11,527	11,843	12,119	12,331	12,579	*2,482*	*2,378*	2,389	2,380	2,361	2,361	2,366
5 | Northern Fringe	57,269	58,256	59,230	60,212	61,273	*2,248*	*2,154*	2,164	2,155	2,138	2,138	2,142
6 | Eastern Fringe	37,036	37,769	38,608	39,424	40,168	*2,404*	*2,303*	2,314	2,304	2,286	2,286	2,291
Total	**198,780**	**204,728**	**210,998**	**216,393**	**221,576**							

Notes:
a. Zones based on the postal sectors shown on the plan at Appendix A
b. Per capita expenditure derived from Experian MMG3 data (2021 report)
c. Population distribution derived from Experian MMG3 data (2021 report)
d. Projections to 2040 have been projected by Nexus Planning by using the Experian MMG3 (2021 report) population trends.
e. Per capita expenditure projected forward using 'adjusted SFT' forecast growth rates taken from Table 6 of Experian Retail Planner Briefing Note 18
f. Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Figure 5 of Appendix 3 to Experian Retail Planner Briefing Note 18
2019 Prices

Table 2a: Total convenience goods expenditure available

Zone	Expenditure (£m) Convenience					Growth (£m) Convenience		
	2021	2025	2030	2035	2040	2021-2025	2021-2030	2021-2040
1 | Uttesford North	82.8	85.6	88.2	90.8	93.4	2.8	5.3	10.6
2 | Uttlesford West	60.6	63.2	65.9	68.4	70.9	2.6	5.2	10.3
3 | Uttlesford East	70.6	73.3	75.8	78.4	80.9	2.7	5.3	10.3
4 | Western Fringe	27.5	28.2	28.6	29.1	29.8	0.6	1.1	2.2
5 | Northern Fringe	123.9	125.6	126.6	128.7	131.3	1.6	2.7	7.3
6 | Eastern Fringe	85.7	87.0	88.3	90.1	92.0	1.3	2.6	6.3
Total	**451.2**	**462.9**	**473.4**	**485.5**	**498.2**	**11.7**	**22.2**	**47.0**

Table 2b: Convenience goods expenditure split between main food shopping and top-up food shopping spend

Zone	Expenditure (£m) Convenience (2021)		
	Main	Top-up	Total
1 | Uttesford North	67.0	15.8	82.8
2 | Uttlesford West	50.5	10.2	60.6
3 | Uttlesford East	56.7	13.8	70.6
4 | Western Fringe	20.9	6.6	27.5
5 | Northern Fringe	99.0	24.9	123.9
6 | Eastern Fringe	69.3	16.4	85.7
Total	**363.5**	**87.7**	**451.2**

Notes:

a. Figures derived from multiplying per capita expenditure with population within each zone using data provided at Table 1

b. Ratio of main food shopping to top-up food shopping per zone derived directly from QuestIons 8 and 14 of the NEMS Household Survey (2021)

2019 Prices

Table 3: Convenience goods shopping patterns

Destination	Total Main Food (%)	Total Top-up (%)	Total Convenience (%)	Zone 1 Main Food (%)	Zone 1 Top-up (%)	Zone 2 Main Food (%)	Zone 2 Top-up (%)	Zone 3 Main Food (%)	Zone 3 Top-up (%)	Zone 4 Main Food (%)	Zone 4 Top-up (%)	Zone 5 Main Food (%)	Zone 5 Top-up (%)	Zone 6 Main Food (%)	Zone 6 Top-up (%)
Uttlesford District															
Saffron Walden Town Centre															
Local market, Saffron Walden Town Centre	0.0%	1.0%	**0.2%**	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%
Local shops, Saffron Walden Town Centre	0.1%	1.3%	**0.3%**	0.0%	4.9%	0.0%	0.0%	0.0%	0.0%	1.7%	2.5%	0.0%	0.3%	0.0%	1.0%
Waitrose, Hill Street, Saffron Walden	6.3%	6.0%	**6.2%**	24.2%	19.9%	2.1%	2.4%	0.9%	0.5%	0.9%	2.5%	4.7%	6.5%	0.0%	0.0%
Saffron Walden Out-of-Centre															
Aldi, Thaxted Road, Knight Park, Saffron Walden	7.4%	2.7%	**6.5%**	22.3%	10.8%	1.5%	0.0%	7.2%	0.0%	0.0%	0.0%	2.5%	2.0%	6.6%	1.1%
B&M, Thaxted Road, Knight Retail Park, Saffron Walden	0.0%	0.3%	**0.1%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%
Tesco Superstore, Radwinter Road, Saffron Walden	11.0%	3.9%	**9.4%**	45.9%	16.9%	1.5%	0.0%	3.2%	1.0%	0.0%	0.0%	5.3%	0.6%	0.7%	2.6%
Stanested Mountfitchet Town Centre															
Co-op, Church Road, Stansted Mountfitchet	0.1%	3.4%	**0.6%**	0.0%	0.8%	0.6%	20.5%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Stansted Mountfitchet Town Centre	0.0%	0.8%	**0.1%**	0.0%	0.0%	0.0%	5.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Cambridge Road, Stansted Mountfitchet	0.1%	3.9%	**0.8%**	0.0%	2.9%	1.1%	23.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great Dunmow Town Centre															
Co-op, White Street, Great Dunmow	0.1%	4.3%	**0.9%**	0.0%	0.0%	0.0%	0.0%	0.9%	21.9%	0.0%	0.0%	0.0%	1.1%	0.0%	1.5%
Local market, Great Dunmow Town Centre	0.0%	0.3%	**0.1%**	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Great Dunmow Town Centre	0.0%	0.8%	**0.1%**	0.0%	0.0%	0.0%	0.0%	0.0%	4.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great Dunmow Out-of-Centre															
Tesco Superstore, Stortford Road, Great Dunmow	12.9%	6.6%	**11.6%**	0.0%	0.0%	8.4%	4.6%	66.9%	33.7%	0.0%	0.0%	0.0%	0.0%	6.9%	1.1%
Thaxted Town Centre															
Local Shops, Thaxted Town Centre	0.1%	1.0%	**0.2%**	0.0%	0.0%	0.0%	0.0%	0.4%	5.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
Local Centres/Villages															
Nisa, Cromwell Road, Saffron Walden	0.0%	1.6%	**0.3%**	0.0%	7.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%
Mini Market, Old Mill Road, Saffron Walden	0.0%	0.2%	**0.0%**	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Pleasant Valley, Saffron Walden	0.4%	3.8%	**1.0%**	0.7%	17.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	2.1%	0.0%	0.0%
Local Shops, Great Chesterford	0.0%	0.1%	**0.0%**	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Newport	0.0%	0.3%	**0.1%**	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops, Widdington	0.0%	0.1%	**0.0%**	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Clavering	0.0%	0.3%	**0.1%**	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Henham	0.0%	0.1%	**0.0%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Hatfield Heath	0.1%	0.4%	**0.1%**	0.0%	0.0%	0.6%	1.3%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops, Hatfield Broad Oak	0.0%	0.6%	**0.1%**	0.0%	0.0%	0.0%	3.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Elsenham	0.0%	0.1%	**0.0%**	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Felsted	0.1%	0.8%	**0.2%**	0.0%	0.0%	0.0%	0.0%	0.4%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Flitch Green	0.0%	1.4%	**0.3%**	0.0%	0.0%	0.0%	0.0%	0.0%	8.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Leaden Roding	0.0%	0.1%	**0.0%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops, Stebbing	0.0%	0.2%	**0.0%**	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Lindsell	0.0%	0.2%	**0.0%**	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Bennet Canfield	0.0%	1.9%	**0.3%**	0.0%	0.0%	0.0%	8.3%	0.0%	4.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
In-Centre Sub-total	**7.4%**	**35.1%**	**12.2%**	**24.8%**	**64.2%**	**4.3%**	**66.0%**	**2.6%**	**58.0%**	**2.6%**	**4.9%**	**5.5%**	**11.5%**	**0.0%**	**3.0%**
Uttlesford District Sub-total	**38.7%**	**48.6%**	**39.7%**	**93.0%**	**91.9%**	**15.8%**	**70.6%**	**80.0%**	**92.7%**	**2.6%**	**4.9%**	**13.3%**	**14.1%**	**14.2%**	**9.6%**
Others in the Study Area															
Local Shops, Barley	0.0%	0.7%	**0.2%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.2%	0.0%	0.0%	0.0%	0.0%
Local Shops, Thriplow	0.0%	0.2%	**0.1%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.7%	0.0%	0.0%	0.0%	0.0%
Local Shops, Haverhill	0.0%	2.4%	**0.5%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.3%	0.0%	0.0%
Aldi, Lordscroft Lane, Haverhill	5.2%	2.2%	**4.5%**	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	18.3%	7.8%	0.0%	0.0%
Lidl, Ehringshausen Way, Haverhill	1.5%	1.3%	**1.4%**	0.7%	0.8%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	4.7%	4.2%	0.0%	0.0%
Sainsbury’s, Haycocks Road, Haverhill	5.0%	3.5%	**4.6%**	0.7%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	17.4%	12.1%	0.0%	0.0%
Tesco, Cangle Road, Haverhill	7.6%	4.9%	**6.9%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	27.0%	17.4%	0.0%	0.0%
Iceland, High Street, Haverhill	0.3%	0.7%	**0.4%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	2.5%	0.0%	0.0%
Local Shops, Ickleton	0.0%	0.2%	**0.0%**	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Balsham	0.0%	0.4%	**0.1%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%
Co-op, High Street, Linton	0.1%	1.2%	**0.3%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	4.1%	0.0%	0.0%
Co-op, High Street, Sawston	0.4%	3.5%	**1.0%**	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	11.5%	0.0%	0.0%
Local shops, Sawston	0.1%	0.6%	**0.2%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	2.2%	0.0%	0.0%
Local shops, Kedington	0.0%	0.3%	**0.1%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%
Local shops, Steeple Bumpstead	0.0%	0.4%	**0.1%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%
Local Shops, Whittlesford	0.0%	0.3%	**0.1%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%
Local Shops, Abington	0.0%	0.1%	**0.0%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%
Local Shops, Great Bardfield	0.0%	0.8%	**0.2%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.6%
Local Shops, Bocking	0.0%	0.2%	**0.0%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
Local Shops, Finchingfield	0.0%	0.1%	**0.0%**	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Great Leighs	0.0%	0.1%	**0.0%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
Local Shops, Great Waltham	0.0%	0.3%	**0.1%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%
Local Shops, Rayne	0.0%	0.1%	**0.0%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
Local Shops, Wethersfield	0.0%	0.1%	**0.0%**	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
Study Area Sub-total	**58.9%**	**73.1%**	**60.4%**	**94.7%**	**95.9%**	**15.8%**	**70.6%**	**80.4%**	**92.7%**	**2.6%**	**21.8%**	**83.8%**	**89.8%**	**14.2%**	**18.5%**
Other Locations Outside Study Area															
Chelmsford	5.8%	6.2%	**6.2%**	0.0%	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	29.4%	37.1%
Royston	6.1%	3.7%	**5.8%**	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	85.3%	63.8%	2.3%	1.2%	0.0%	0.0%
Harlow	1.2%	0.9%	**1.1%**	0.0%	0.0%	8.3%	6.4%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cambridge	3.9%	2.7%	**3.6%**	0.9%	0.9%	0.0%	0.0%	0.0%	0.0%	9.0%	2.5%	11.6%	8.4%	0.0%	0.0%
Bishops Stortford	11.7%	3.5%	**10.4%**	2.3%	1.3%	75.3%	21.3%	5.9%	0.0%	0.0%	0.0%	0.0%	0.7%	2.0%	0.0%
Braintree	9.4%	8.3%	**9.7%**	0.0%	0.9%	0.0%	0.0%	8.8%	5.8%	0.0%	0.0%	0.0%	0.0%	44.4%	42.9%
Others outside the Study Area	3.0%	1.6%	**2.8%**	0.0%	1.1%	0.6%	1.7%	1.6%	1.5%	3.2%	12.0%	2.3%	0.0%	10.0%	1.5%
Outside Study Area Sub-total	**41.2%**	**26.9%**	**39.6%**	**5.3%**	**4.2%**	**84.2%**	**29.4%**	**19.6%**	**7.3%**	**97.5%**	**78.2%**	**16.2%**	**10.2%**	**85.8%**	**81.5%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:

a. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey (2021)

b. Excludes 'don't know/varies', markets and internet sales

Uttlesford Retail Capacity Study
Nexus Planning

Table 4: Convenience goods expenditure

Destination	Total Main Food (£m)	Total Top-up (£m)	Total Convenience (£m)	Zone 1 Main Food (£m)	Zone 1 Top-up (£m)	Zone 2 Main Food (£m)	Zone 2 Top-up (£m)	Zone 3 Main Food (£m)	Zone 3 Top-up (£m)	Zone 4 Main Food (£m)	Zone 4 Top-up (£m)	Zone 5 Main Food (£m)	Zone 5 Top-up (£m)	Zone 6 Main Food (£m)	Zone 6 Top-up (£m)
Uttlesford District															
Saffron Walden Town Centre															
Local market, Saffron Walden Town Centre	£0.0	£0.8	**£0.8**	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0
Local shops, Saffron Walden Town Centre	£0.4	£1.2	**£1.5**	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.4	£0.2	£0.0	£0.1	£0.0	£0.2
Waitrose, Hill Street, Saffron Walden	£22.6	£5.2	**£27.8**	£16.2	£3.1	£1.1	£0.2	£0.5	£0.1	£0.2	£0.2	£4.6	£1.6	£0.0	£0.0
Saffron Walden Out-of-Centre															
Aldi, Thaxted Road, Knight Park, Saffron Walden	£26.8	£2.4	**£29.2**	£14.9	£1.7	£0.8	£0.0	£4.1	£0.0	£0.0	£0.0	£2.4	£0.5	£4.6	£0.2
B&M, Thaxted Road, Knight Retail Park, Saffron Walden	£0.0	£0.3	**£0.3**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
Tesco Superstore, Radwinter Road, Saffron Walden	£39.1	£3.4	**£42.5**	£30.8	£2.7	£0.8	£0.0	£1.8	£0.1	£0.0	£0.0	£5.3	£0.1	£0.5	£0.4
Stanested Mountfitchet Town Centre															
Co-op, Church Road, Stansted Mountfitchet	£0.3	£2.4	**£2.7**	£0.0	£0.1	£0.3	£2.1	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Shops, Stansted Mountfitchet Town Centre	£0.0	£0.6	**£0.6**	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Express, Cambridge Road, Stansted Mountfitchet	£0.6	£2.8	**£3.4**	£0.0	£0.5	£0.6	£2.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Dunmow Town Centre															
Co-op, White Street, Great Dunmow	£0.5	£3.5	**£4.0**	£0.0	£0.0	£0.0	£0.0	£0.5	£3.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.2
Local market, Great Dunmow Town Centre	£0.0	£0.2	**£0.2**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Shops, Great Dunmow Town Centre	£0.0	£0.6	**£0.6**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Dunmow Out-of-Centre															
Tesco Superstore, Stortford Road, Great Dunmow	£47.0	£5.3	**£52.3**	£0.0	£0.0	£4.3	£0.5	£38.0	£4.7	£0.0	£0.0	£0.0	£0.0	£4.8	£0.2
Thaxted Town Centre															
Local Shops, Thaxted Town Centre	£0.2	£0.8	**£1.1**	£0.0	£0.0	£0.0	£0.0	£0.2	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Local Centres/Villages															
Nisa, Cromwell Road, Saffron Walden	£0.0	£1.4	**£1.4**	£0.0	£1.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0
Mini Market, Old Mill Road, Saffron Walden	£0.0	£0.2	**£0.2**	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Express, Pleasant Valley, Saffron Walden	£1.3	£3.3	**£4.6**	£0.4	£2.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.5	£0.0	£0.0
Local Shops, Great Chesterford	£0.0	£0.1	**£0.1**	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Shops, Newport	£0.0	£0.3	**£0.3**	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local shops, Widdington	£0.0	£0.1	**£0.1**	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Shops, Clavering	£0.0	£0.3	**£0.3**	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Shops, Henham	£0.0	£0.1	**£0.1**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Shops, Hatfield Heath	£0.3	£0.3	**£0.6**	£0.0	£0.0	£0.3	£0.1	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local shops, Hatfield Broad Oak	£0.0	£0.4	**£0.4**	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Shops, Elsenham	£0.0	£0.1	**£0.1**	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Shops, Felsted	£0.2	£0.6	**£0.9**	£0.0	£0.0	£0.0	£0.0	£0.2	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Shops, Flitch Green	£0.0	£1.2	**£1.2**	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Shops, Leaden Roding	£0.0	£0.1	**£0.1**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local shops, Stebbing	£0.0	£0.2	**£0.2**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Shops, Lindsell	£0.0	£0.1	**£0.1**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Shops, Bennet Canfield	£0.0	£1.4	**£1.4**	£0.0	£0.0	£0.0	£0.8	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
In-Centre Sub-total	**£26.3**	**£28.6**	**£54.9**	**£16.6**	**£10.2**	**£2.2**	**£6.7**	**£1.5**	**£8.0**	**£0.5**	**£0.3**	**£5.5**	**£2.9**	**£0.0**	**£0.5**
Uttlesford District Sub-total	**£139.2**	**£40.0**	**£179.2**	**£62.3**	**£14.6**	**£8.0**	**£7.2**	**£45.4**	**£12.8**	**£0.5**	**£0.3**	**£13.2**	**£3.5**	**£9.8**	**£1.6**
Others in the Study Area															
Local Shops, Barley	£0.0	£0.9	**£0.9**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0	£0.0	£0.0	£0.0
Local Shops, Thriplow	£0.0	£0.2	**£0.2**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
Local Shops, Haverhill	£0.0	£2.1	**£2.1**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.1	£0.0	£0.0
Aldi, Lordscroft Lane, Haverhill	£18.3	£1.9	**£20.3**	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£18.1	£1.9	£0.0	£0.0
Lidl, Ehringshausen Way, Haverhill	£5.3	£1.2	**£6.5**	£0.4	£0.1	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£4.6	£1.0	£0.0	£0.0
Sainsbury's, Haycocks Road, Haverhill	£17.6	£3.1	**£20.7**	£0.4	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£17.2	£3.0	£0.0	£0.0
Tesco, Cangle Road, Haverhill	£26.8	£4.3	**£31.1**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£26.8	£4.3	£0.0	£0.0
Iceland, High Street, Haverhill	£1.0	£0.6	**£1.6**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.6	£0.0	£0.0
Local Shops, Ickleton	£0.0	£0.2	**£0.2**	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Shops, Balsham	£0.0	£0.4	**£0.4**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0
Co-op, High Street, Linton	£0.4	£1.0	**£1.5**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£1.0	£0.0	£0.0
Co-op, High Street, Sawston	£1.4	£3.0	**£4.5**	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£2.9	£0.0	£0.0
Local shops, Sawston	£0.3	£0.5	**£0.8**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.5	£0.0	£0.0
Local shops, Kedington	£0.0	£0.3	**£0.3**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0
Local shops, Steeple Bumpstead	£0.0	£0.3	**£0.3**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0
Local Shops, Whittlesford	£0.0	£0.3	**£0.3**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0
Local Shops, Abington	£0.0	£0.1	**£0.1**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0
Local Shops, Great Bardfield	£0.0	£0.8	**£0.8**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8
Local Shops, Bocking	£0.0	£0.2	**£0.2**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Local Shops, Finchingfield	£0.0	£0.1	**£0.1**	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Shops, Great Leighs	£0.0	£0.1	**£0.1**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Local Shops, Great Waltham	£0.0	£0.2	**£0.2**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Local Shops, Rayne	£0.0	£0.1	**£0.1**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Local Shops, Wethersfield	£0.0	£0.1	**£0.1**	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Study Area Sub-total	**£210.4**	**£62.0**	**£272.4**	**£63.4**	**£15.2**	**£8.0**	**£7.2**	**£45.6**	**£12.8**	**£0.5**	**£1.4**	**£83.0**	**£22.4**	**£9.8**	**£3.0**
Other Locations Outside Study Area															
Chelmsford	£22.0	£6.1	**£28.1**	£0.0	£0.0	£0.0	£0.0	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£20.4	£6.1
Royston	£21.6	£4.5	**£26.1**	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£17.9	£4.2	£2.3	£0.3	£0.0	£0.0
Harlow	£4.4	£0.6	**£5.1**	£0.0	£0.0	£4.2	£0.6	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Cambridge	£13.9	£2.4	**£16.3**	£0.6	£0.1	£0.0	£0.0	£0.0	£0.0	£1.9	£0.2	£11.4	£2.1	£0.0	£0.0
Bishops Stortford	£44.3	£2.5	**£46.9**	£1.5	£0.2	£38.0	£2.2	£3.4	£0.0	£0.0	£0.0	£0.0	£0.2	£1.4	£0.0
Braintree	£35.7	£8.0	**£43.7**	£0.0	£0.1	£0.0	£0.0	£5.0	£0.8	£0.0	£0.0	£0.0	£0.0	£30.7	£7.0
Others outside the Study Area	£11.1	£1.6	**£12.7**	£0.0	£0.2	£0.3	£0.2	£0.9	£0.2	£0.7	£0.8	£2.3	£0.0	£6.9	£0.2
Outside Study Area Sub-total	**£153.1**	**£25.7**	**£178.8**	**£3.6**	**£0.7**	**£42.5**	**£3.0**	**£11.1**	**£1.0**	**£20.4**	**£5.2**	**£16.0**	**£2.5**	**£59.5**	**£13.4**
Total	**£363.5**	**£87.7**	**£451.2**	**£67.0**	**£15.8**	**£50.5**	**£10.2**	**£56.7**	**£13.8**	**£20.9**	**£6.6**	**£99.0**	**£24.9**	**£69.3**	**£16.4**

Notes:
a. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey (2021)
b. Excludes 'don't know/varies', markets and internet sales
2019 Prices

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Table 5: Convenience goods turnover benchmarking

Destination	Net Sales Area (sq m)	Net Convenience Sales Area (sq m)	Sales Density (£ per sq m)	Benchmark Turnover (£m)	Survey Turnover (£m)	Inflow from Beyond Study Area (£m)	Trading Position against Benchmark (£m)
Uttlesford District							
Saffron Walden Town Centre							
Local market, Saffron Walden Town Centre				£0.8	£0.8	£0.0	£0.0
Local shops, Saffron Walden Town Centre				£1.5	£1.5	£0.1	£0.1
Waitrose, Hill Street, Saffron Walden	2,501	2,099	£13,718	£28.8	£27.8	£1.4	£0.4
Saffron Walden Out-of-Centre							
Aldi, Thaxted Road, Knight Park, Saffron Walden	1,218	1,065	£11,143	£11.9	£29.2		£17.4
B&M, Thaxted Road, Knight Retail Park, Saffron Walden				£0.3	£0.3		£0.0
Tesco Superstore, Radwinter Road, Saffron Walden	3,196	2,143	£14,447	£31.0	£42.5		£11.6
Stanested Mountfitchet Town Centre							
Co-op, Church Road, Stansted Mountfitchet	438	395	£11,355	£4.5	£2.7		-£1.8
Local Shops, Stansted Mountfitchet Town Centre				£0.6	£0.6		£0.0
Tesco Express, Cambridge Road, Stansted Mountfitchet	272	258	£14,447	£3.7	£3.4		-£0.3
Great Dunmow Town Centre							
Co-op, White Street, Great Dunmow	725	654	£11,355	£7.4	£4.0		-£3.4
Local market, Great Dunmow Town Centre				£0.2	£0.2		£0.0
Local Shops, Great Dunmow Town Centre				£0.6	£0.6		£0.0
Great Dunmow Out-of-Centre							
Tesco Superstore, Stortford Road, Great Dunmow	2,941	1,972	£14,447	£28.5	£52.3		£23.8
Thaxted Town Centre							
Local Shops, Thaxted Town Centre				£1.1	£1.1		£0.0
Local Centres/Villages							
Nisa, Cromwell Road, Saffron Walden	243	231	£7,500	£1.7	£1.4		-£0.3
Mini Market, Old Mill Road, Saffron Walden				£0.2	£0.2		£0.0
Tesco Express, Pleasant Valley, Saffron Walden	224	213	£14,447	£3.1	£4.6		£1.5
Local Shops, Great Chesterford				£0.1	£0.1		£0.0
Local Shops, Newport				£0.3	£0.3		£0.0
Local shops, Widdington				£0.1	£0.1		£0.0
Local Shops, Clavering				£0.3	£0.3		£0.0
Local Shops, Henham				£0.1	£0.1		£0.0
Local Shops, Hatfield Heath				£0.6	£0.6		£0.0
Local shops, Hatfield Broad Oak				£0.4	£0.4		£0.0
Local Shops, Elsenham				£0.1	£0.1		£0.0
Local Shops, Felsted				£0.9	£0.9		£0.0
Local Shops, Flitch Green				£1.2	£1.2		£0.0
Local Shops, Leaden Roding				£0.1	£0.1		£0.0
Local shops, Stebbing				£0.2	£0.2		£0.0
Local Shops, Lindsell				£0.1	£0.1		£0.0
Local Shops, Bennet Canfield				£1.4	£1.4		£0.0
In-Centre Sub-total				**£60.2**	**£54.9**	**£1.5**	**-£3.8**
Uttlesford District Sub-total				**£131.8**	**£179.2**	**£180.7**	**£48.9**

Notes:
a. Gross floorspace derived from Valuation Office Agency (VOA) records.
b. Proportion of net floorspace dedicated to convenience goods sales generally taken from company benchmark average (exceptions relate to small convenience stores, which we have assumed will be 95% convenience goods)
c. Sales densities derived from GlobalData Convenience and Comparison Goods Sales Densities of Major Grocers (2020) and Mintel Retail Rankings (2021)
d. It is assumed that all unnamed convenience stores and independent stores are 'trading at equilibrium' (i.e. their 'benchmark' turnover equates to that ientified by the survey)
e. Survey derived performance of stores calculated by adding together 'main' and 'top up' turnover as set out in Table 4
2019 Prices

Table 6a: Estimated 'capacity' for new convenience goods facilities in Uttlesford District

Year	Benchmark Turnover (£m)[1]	Survey Turnover (£m)[2]	Inflow (£m)	Surplus Expenditure (£m)
2021	131.8	179.2	1.5	48.9
2025	132.8	183.8	1.5	52.5
2030	132.8	188.0	1.6	56.7
2035	132.8	192.8	1.6	61.6
2040	136.8	197.8	1.7	62.7
Study Area Market Share (%)		39.7		

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 18 (Oct 2020)
2. Assumes constant market share claimed by Uttlesford District facilities at 39.7% from the Study Area

2019 Prices

Table 6b: Gross quantitative capacity for additional convenience goods floorspace in Uttlesford District

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq m net)	
		Min[1]	Max[2]
2021	48.9	4,300	6,300
2025	52.5	4,600	6,700
2030	56.7	4,900	7,200
2035	61.6	5,300	7,800
2040	62.7	5,400	7,900

a. Average sales density assumed to be £11,425 per sq m (at 2021), based on the average sales density of supermarket foodstore operators
b. Average sales density assumed to be £7,825 per sq m (at 2021), based on the average sales density of Aldi, Lidl and other discount retail operators
c. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 18 (October 2020)

2019 Prices

Table 6c: Extant convenience goods commitments in Uttlesford District

Destination	Reference	Proposal	Net Convenience Floorspace (sq m)	Estimated Sales Density (£/sq m)	Estimated Convenience Turnover (£m)
Commercial Centre, Ashdon Road, Saffron Walden	UTT/17/3413/OP	Outline permission for the erection of up to 55 dwellings, A1, B1, B2 and or D2 floorspace.	279	8,000	2.2
The Barn Studio, Mill Road, Henham	UTT/20/2093/CLE	Change of use of funciton barn (D2) To use as a case, grocery store and offices.	304	8,000	2.4
Total					4.7

Notes:
a. Sales density assumed to be £8,000 based on Nexus Planning judgement where the format or occupier has not been referenced within the application.
b. Assessed commitments limited to development proposals greater then 200 sq m

2019 Prices

Table 6d: Net quantitative capacity for additional convenience goods floorspace in Uttlesford District

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min[1]	Max[2]
2021	48.9	4.7	44.2	3,900	5,700
2025	52.5	4.7	47.8	4,200	6,100
2030	56.7	4.7	52.0	4,500	6,600
2035	61.6	4.7	56.9	4,900	7,200
2040	62.7	4.7	58.0	5,000	7,300

1. Average sales density assumed to be £11,605 per sq.m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2018
2. Average sales density assumed to be £9,137 per sq.m (rounded) based on the average sales density of discount operators as identified by Verdict 2018
3. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 18 (Ocotber 2020)

2018 Prices

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Table 7a: Population and comparison goods expenditure per capita

Zone	Population				
	2021	2025	2030	2035	2040
1 | Uttesford North	35,214	36,537	37,927	39,064	40,103
2 | Uttlesford West	27,042	28,319	29,733	30,876	31,935
3 | Uttlesford East	30,692	32,004	33,381	34,486	35,518
4 | Western Fringe	11,527	11,843	12,119	12,331	12,579
5 | Northern Fringe	57,269	58,256	59,230	60,212	61,273
6 | Eastern Fringe	37,036	37,769	38,608	39,424	40,168
Total	**198,780**	**204,728**	**210,998**	**216,393**	**221,576**

Table 7b: Population and comparison goods expenditure

Zone	Comparison goods expenditure per capita (£) 2021 with SfT								
	Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	**Total**
1 | Uttesford North	1,058	283	892	710	313	620	301	240	**4,417**
2 | Uttlesford West	1,005	271	867	710	284	597	283	226	**4,243**
3 | Uttlesford East	1,007	273	884	730	292	590	287	223	**4,287**
4 | Western Fringe	1,053	278	907	736	314	601	315	239	**4,441**
5 | Northern Fringe	913	250	797	662	246	550	235	185	**3,838**
6 | Eastern Fringe	1,020	273	843	693	294	581	277	213	**4,193**

Zone	Comparison goods expenditure per capita (£) 2021 without SFT								
	Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	**Total**
1 | Uttesford North	827	222	697	555	244	485	236	188	**3,454**
2 | Uttlesford West	786	212	678	555	222	467	222	177	**3,318**
3 | Uttlesford East	788	214	692	571	228	462	225	174	**3,353**
4 | Western Fringe	823	217	709	576	245	470	246	187	**3,473**
5 | Northern Fringe	714	196	623	518	192	430	184	144	**3,002**
6 | Eastern Fringe	797	214	659	542	230	454	216	166	**3,279**

Zone	Comparison goods expenditure per capita (£) 2025								
	Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	**Total**
1 | Uttesford North	909	243	766	610	268	532	259	207	**3,794**
2 | Uttlesford West	863	232	745	610	244	513	243	194	**3,645**
3 | Uttlesford East	865	235	760	627	251	507	247	192	**3,683**
4 | Western Fringe	904	239	779	632	269	516	270	205	**3,815**
5 | Northern Fringe	784	215	684	569	211	473	202	159	**3,297**
6 | Eastern Fringe	876	235	724	595	252	499	238	183	**3,602**

Zone	Comparison goods expenditure per capita (£) 2030								
	Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	**Total**
1 | Uttesford North	1,016	272	857	682	300	595	289	231	**4,242**
2 | Uttlesford West	965	260	833	682	273	574	272	217	**4,076**
3 | Uttlesford East	967	262	849	701	280	567	276	214	**4,118**
4 | Western Fringe	1,011	267	871	707	301	577	302	230	**4,266**
5 | Northern Fringe	877	240	765	636	236	528	226	177	**3,687**
6 | Eastern Fringe	979	262	810	666	282	558	266	204	**4,027**

Zone	Comparison goods expenditure per capita (£) 2035								
	Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	**Total**
1 | Uttesford North	1,154	309	973	774	341	676	329	262	**4,819**
2 | Uttlesford West	1,097	295	946	774	310	651	309	246	**4,629**
3 | Uttlesford East	1,099	298	965	797	318	644	313	243	**4,677**
4 | Western Fringe	1,148	303	989	803	342	656	343	261	**4,845**
5 | Northern Fringe	996	273	869	723	268	600	257	201	**4,187**
6 | Eastern Fringe	1,112	298	920	756	321	634	302	232	**4,574**

Zone	Comparison goods expenditure per capita (£) 2040								
	Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	**Total**
1 | Uttesford North	1,320	354	1,113	886	390	773	376	300	**5,511**
2 | Uttlesford West	1,254	337	1,082	885	355	745	353	282	**5,294**
3 | Uttlesford East	1,257	341	1,103	911	364	736	358	278	**5,349**
4 | Western Fringe	1,313	346	1,131	918	391	750	393	298	**5,541**
5 | Northern Fringe	1,139	312	994	826	307	686	294	230	**4,789**
6 | Eastern Fringe	1,272	341	1,052	865	367	725	345	265	**5,231**

Notes:

a. Zones based on the postal sectors shown on the plan at Appendix A
b. Per capita expenditure derived from Experian MMG3 data (2021 report)
c. Population distribution derived from Experian MMG3 data (2021 report)
d. Projections to 2040 have been projected by Nexus Planning by using the Experian MMG3 (2021 report) population trends.
e. Per capita expenditure projected forward using 'adjusted SFT' forecast growth rates taken from Table 6 of Experian Retail Planner Briefing Note 18
f. Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Figure 5 of Appendix 3 to Experian Retail Planner Briefing Note 18

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Table 8: Total comparison goods expenditure available

Zone	Comparison goods expenditure (£m) 2021									Comparison goods expenditure (£m) 2025									Comparison goods expenditure (£m) 2030								
	Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total
1 | Uttesford North	29.1	7.8	24.6	19.5	8.6	17.1	8.3	6.6	**121.6**	33.2	8.9	28.0	22.3	9.8	19.4	9.5	7.5	**138.6**	38.5	10.3	32.5	25.9	11.4	22.6	11.0	8.8	**160.9**
2 | Uttlesford West	21.3	5.7	18.3	15.0	6.0	12.6	6.0	4.8	**89.7**	24.4	6.6	21.1	17.3	6.9	14.5	6.9	5.5	**103.2**	28.7	7.7	24.8	20.3	8.1	17.1	8.1	6.4	**121.2**
3 | Uttlesford East	24.2	6.6	21.2	17.5	7.0	14.2	6.9	5.4	**102.9**	27.7	7.5	24.3	20.1	8.0	16.2	7.9	6.1	**117.9**	32.3	8.8	28.4	23.4	9.4	18.9	9.2	7.2	**137.5**
4 | Western Fringe	9.5	2.5	8.2	6.6	2.8	5.4	2.8	2.2	**40.0**	10.7	2.8	9.2	7.5	3.2	6.1	3.2	2.4	**45.2**	12.3	3.2	10.6	8.6	3.7	7.0	3.7	2.8	**51.7**
5 | Northern Fringe	40.9	11.2	35.7	29.7	11.0	24.6	10.5	8.3	**171.9**	45.7	12.5	39.9	33.1	12.3	27.5	11.8	9.2	**192.1**	51.9	14.2	45.3	37.7	14.0	31.3	13.4	10.5	**218.4**
6 | Eastern Fringe	29.5	7.9	24.4	20.1	8.5	16.8	8.0	6.2	**121.4**	33.1	8.9	27.3	22.5	9.5	18.8	9.0	6.9	**136.0**	37.8	10.1	31.3	25.7	10.9	21.5	10.3	7.9	**155.5**
Total	**154.5**	**41.7**	**132.4**	**108.5**	**44.0**	**90.7**	**42.6**	**33.3**	**647.6**	**174.8**	**47.2**	**149.8**	**122.7**	**49.8**	**102.7**	**48.2**	**37.7**	**733.0**	**201.5**	**54.4**	**172.7**	**141.5**	**57.4**	**118.4**	**55.6**	**43.5**	**845.1**

Zone	Comparison goods expenditure (£m) 2035									Comparison goods expenditure (£m) 2040								
	Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	Clothes	CDs etc	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total
1 | Uttesford North	45.1	12.1	38.0	30.2	13.3	26.4	12.8	10.2	**188.2**	52.9	14.2	44.6	35.5	15.6	31.0	15.1	12.0	**221.0**
2 | Uttlesford West	33.9	9.1	29.2	23.9	9.6	20.1	9.5	7.6	**142.9**	40.0	10.8	34.6	28.3	11.3	23.8	11.3	9.0	**169.1**
3 | Uttlesford East	37.9	10.3	33.3	27.5	11.0	22.2	10.8	8.4	**161.3**	44.6	12.1	39.2	32.4	12.9	26.2	12.7	9.9	**190.0**
4 | Western Fringe	14.2	3.7	12.2	9.9	4.2	8.1	4.2	3.2	**59.7**	16.5	4.4	14.2	11.6	4.9	9.4	4.9	3.8	**69.7**
5 | Northern Fringe	60.0	16.4	52.3	43.5	16.2	36.1	15.5	12.1	**252.1**	69.8	19.1	60.9	50.6	18.8	42.1	18.0	14.1	**293.4**
6 | Eastern Fringe	43.9	11.7	36.3	29.8	12.6	25.0	11.9	9.1	**180.3**	51.1	13.7	42.2	34.7	14.7	29.1	13.9	10.7	**210.1**
Total	**234.8**	**63.4**	**201.3**	**164.8**	**66.9**	**137.9**	**64.8**	**50.7**	**984.7**	**275.0**	**74.2**	**235.7**	**193.1**	**78.4**	**161.5**	**75.9**	**59.4**	**1,153.3**

Notes:

a. Zones based on the postal sectors shown on the plan at Appendix A
b. Per capita expenditure derived from Experian MMG3 data (2021 report)
c. Population distribution derived from Experian MMG3 data (2021 report)
d. Projections to 2040 have been projected by Nexus Planning by using the Experian MMG3 (2021 report) population trends.
e. Per capita expenditure projected forward using 'adjusted SFT' forecast growth rates taken from Table 6 of Experian Retail Planner Briefing Note 18
f. Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Figure 5 of Appendix 3 to Experian Retail Planner Briefing Note 18

2019 Prices

Table 9: Clothing & footwear shopping patterns

Destination	Total Clothing (%)	Zone 1 Clothing (%)	Zone 2 Clothing (%)	Zone 3 Clothing (%)	Zone 4 Clothing (%)	Zone 5 Clothing (%)	Zone 6 Clothing (%)
Uttlesford District							
Saffron Walden Town Centre							
Saffron Walden town centre	5.1%	16.3%	7.1%	0.0%	1.1%	4.8%	0.9%
Waitrose, Hill Street, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Saffron Walden Out of Centre							
Aldi, Knight Park, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Elizabeth Way, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Knight Park, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Shire Hill Industrial Estate, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Springwell Nursery & Garden Centre, Walden Road, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Radwinter Road, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stansted Mountfitchet Town Centre							
Stansted Mountfitchet village centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Cambridge Road, Stansted Mountfitchet	0.1%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%
Stansted Mountfitchet Out of Centre							
Stansted Airport, Bassingbourn Road, Stansted	0.2%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%
You're Furnished, Hall Road, Bamber's Green	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great Dunmow Town Centre							
Great Dunmow town centre	0.4%	0.0%	1.3%	1.2%	0.0%	0.0%	0.0%
Great Dunmow Out of Centre							
Langthorns Plantery, High Cross Lane West, Little Canfield, Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Chapel End Nursery, Broxted, Great Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Stortford Road, Great Dunmow	0.1%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%
Travis Perkins, Chelmsford Road, Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Thaxted Town Centre							
Thaxted town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Centres/Villages							
Newport Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ridgeons, Commercial Centre, Ashdon Road, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, The Heath, Hatfield Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Takeley village centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
In-Centre Sub-total	**5.6%**	**16.3%**	**9.3%**	**1.2%**	**1.1%**	**4.8%**	**0.9%**
Uttrlesford District Sub-total	5.9%	17.9%	9.3%	1.8%	1.1%	4.8%	0.9%
Others in the Study Area							
Aldi, Lordscroft Lane, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Argos in Sainsbury's, Haycocks Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cambridge Road Retail Park, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
CGS Carpet Warehouse, Boundary Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Civic Industrial Estate, Homefield Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, High Street, Sawston	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
David Holland Pharmacy, Norton Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Haverhill town centre	3.1%	0.0%	0.0%	0.0%	0.0%	10.9%	0.0%
Hollands Road Industrial Estate, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, Haycocks Road, Haverhill	1.8%	0.6%	0.0%	0.0%	0.0%	5.9%	0.0%
Sturmer Nurseries, Church Walk, Sturmer, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Cangle Road, Haverhill	0.3%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%
Pampisford Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sawston village centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
Study Area Sub-Total	**11.1%**	**18.5%**	**9.3%**	**1.8%**	**1.1%**	**23.0%**	**0.9%**
Other Locations Outside Study Area							
Chelmsford	19.6%	0.0%	1.3%	45.1%	0.0%	0.0%	60.6%
Royston	1.0%	0.0%	0.0%	0.0%	15.9%	0.0%	0.0%
Harlow	4.6%	5.2%	18.3%	8.0%	0.0%	0.0%	0.0%
Cambridge	31.4%	55.2%	11.6%	9.9%	60.8%	54.7%	3.7%
Bishops Stortford	8.4%	6.6%	41.0%	7.1%	0.0%	2.0%	0.0%
Braintree	13.6%	9.5%	8.6%	23.1%	0.0%	4.1%	30.5%
Bury St Edmunds	3.8%	0.0%	0.0%	0.0%	0.0%	13.6%	0.0%
Others outside the Study Area	6.3%	5.0%	9.9%	5.0%	22.2%	2.7%	4.2%
Outside Study Area Sub-total	**88.9%**	**81.5%**	**90.7%**	**98.2%**	**98.9%**	**77.0%**	**99.1%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:
a. Zones based on post code sectors
b. Market shares for shopping derived directly from NEMS Household Survey (2021)
c. Figures may not total due to rounding

Table 10: Clothing & footwear shopping expenditure

Destination	Total Clothing (£m)	Zone 1 Clothing (£m)	Zone 2 Clothing (£m)	Zone 3 Clothing (£m)	Zone 4 Clothing (£m)	Zone 5 Clothing (£m)	Zone 6 Clothing (£m)
Uttlesford District							
Saffron Walden Town Centre							
Saffron Walden town centre	£8.6	£4.7	£1.5	£0.0	£0.1	£2.0	£0.3
Waitrose, Hill Street, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Saffron Walden Out of Centre							
Aldi, Knight Park, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Homebase, Elizabeth Way, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Knight Park, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Shire Hill Industrial Estate, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Springwell Nursery & Garden Centre, Walden Road, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco, Radwinter Road, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Stansted Mountfitchet Town Centre							
Stansted Mountfitchet village centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Express, Cambridge Road, Stansted Mountfitchet	£0.2	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
Stansted Mountfitchet Out of Centre							
Stansted Airport, Bassingbourn Road, Stansted	£0.5	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0
You're Furnished, Hall Road, Bamber's Green	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Dunmow Town Centre							
Great Dunmow town centre	£0.6	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0
Great Dunmow Out of Centre							
Langthorns Plantery, High Cross Lane West, Little Canfield, Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Chapel End Nursery, Broxted, Great Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco, Stortford Road, Great Dunmow	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0
Travis Perkins, Chelmsford Road, Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Thaxted Town Centre							
Thaxted town centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Centres/Villages	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Newport Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Ridgeons, Commercial Centre, Ashdon Road, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Co-op, The Heath, Hatfield Heath	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Takeley village centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
In-Centre Sub-total	**£9.3**	**£4.7**	**£2.0**	**£0.3**	**£0.1**	**£2.0**	**£0.3**
Uttrlesford District Sub-total	£10.0	£5.2	£2.0	£0.4	£0.1	£2.0	£0.3
Others in the Study Area							
Aldi, Lordscroft Lane, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Argos in Sainsbury's, Haycocks Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Cambridge Road Retail Park, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
CGS Carpet Warehouse, Boundary Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Civic Industrial Estate, Homefield Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Co-op, High Street, Sawston	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
David Holland Pharmacy, Norton Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Haverhill town centre	£4.5	£0.0	£0.0	£0.0	£0.0	£4.5	£0.0
Hollands Road Industrial Estate, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sainsbury's, Haycocks Road, Haverhill	£2.6	£0.2	£0.0	£0.0	£0.0	£2.4	£0.0
Sturmer Nurseries, Church Walk, Sturmer, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Cangle Road, Haverhill	£0.4	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0
Pampisford Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sawston village centre	£0.2	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0
Study Area Sub-Total	**£17.6**	**£5.4**	**£2.0**	**£0.4**	**£0.1**	**£9.4**	**£0.3**
Other Locations Outside Study Area							
Chelmsford	£29.1	£0.0	£0.3	£10.9	£0.0	£0.0	£17.9
Royston	£1.5	£0.0	£0.0	£0.0	£1.5	£0.0	£0.0
Harlow	£7.3	£1.5	£3.9	£1.9	£0.0	£0.0	£0.0
Cambridge	£50.2	£16.1	£2.5	£2.4	£5.8	£22.4	£1.1
Bishops Stortford	£13.2	£1.9	£8.7	£1.7	£0.0	£0.8	£0.0
Braintree	£20.9	£2.8	£1.8	£5.6	£0.0	£1.7	£9.0
Bury St Edmunds	£5.6	£0.0	£0.0	£0.0	£0.0	£5.6	£0.0
Others outside the Study Area	£9.2	£1.5	£2.1	£1.2	£2.1	£1.1	£1.2
Outside Study Area Sub-total	**£136.9**	**£23.8**	**£19.3**	**£23.7**	**£9.4**	**£31.5**	**£29.3**
Total	**£154.5**	**£29.1**	**£21.3**	**£24.2**	**£9.5**	**£40.9**	**£29.5**

Notes:
a. Zones based on post code sectors
b. Market shares for shopping derived directly from NEMS Household Survey (2021)
c. Figures may not total due to rounding

Table 11: Small Media Items shopping patterns

Destination	Total Media (%)	Zone 1 Media (%)	Zone 2 Media (%)	Zone 3 Media (%)	Zone 4 Media (%)	Zone 5 Media (%)	Zone 6 Media (%)
Uttlesford District							
Saffron Walden Town Centre							
Saffron Walden town centre	22.2%	76.9%	18.3%	8.3%	11.5%	16.7%	0.0%
Waitrose, Hill Street, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Saffron Walden Out of Centre							
Aldi, Knight Park, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Elizabeth Way, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Knight Park, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Shire Hill Industrial Estate, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Springwell Nursery & Garden Centre, Walden Road, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Radwinter Road, Saffron Walden	0.4%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Stansted Mountfitchet Town Centre							
Stansted Mountfitchet village centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Cambridge Road, Stansted Mountfitchet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stansted Mountfitchet Out of Centre							
Stansted Airport, Bassingbourn Road, Stansted	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
You're Furnished, Hall Road, Bamber's Green	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great Dunmow Town Centre							
Great Dunmow town centre	1.9%	0.0%	0.0%	11.1%	0.0%	0.0%	0.0%
Great Dunmow Out of Centre							
Langthorns Plantery, High Cross Lane West, Little Canfield, Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Chapel End Nursery, Broxted, Great Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Stortford Road, Great Dunmow	1.5%	0.0%	0.0%	8.3%	0.0%	0.0%	0.0%
Travis Perkins, Chelmsford Road, Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Thaxted Town Centre							
Thaxted town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Centres/Villages							
Newport Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ridgeons, Commercial Centre, Ashdon Road, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, The Heath, Hatfield Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Takeley village centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
In-Centre Sub-total	**24.1%**	**76.9%**	**18.3%**	**19.4%**	**11.5%**	**16.7%**	**0.0%**
Uttrlesford District Sub-total	26.0%	79.6%	18.3%	27.7%	11.5%	16.7%	0.0%
Others in the Study Area							
Aldi, Lordscroft Lane, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Argos in Sainsbury's, Haycocks Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cambridge Road Retail Park, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
CGS Carpet Warehouse, Boundary Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Civic Industrial Estate, Homefield Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, High Street, Sawston	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
David Holland Pharmacy, Norton Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Haverhill town centre	8.4%	0.0%	0.0%	0.0%	0.0%	27.4%	0.0%
Hollands Road Industrial Estate, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury’s, Haycocks Road, Haverhill	1.9%	0.0%	0.0%	0.0%	0.0%	6.2%	0.0%
Sturmer Nurseries, Church Walk, Sturmer, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Cangle Road, Haverhill	1.7%	0.0%	0.0%	0.0%	0.0%	5.4%	0.0%
Pampisford Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sawston village centre	0.3%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%
Study Area Sub-Total	**38.3%**	**79.6%**	**18.3%**	**27.7%**	**11.5%**	**56.5%**	**0.0%**
Other Locations Outside Study Area							
Chelmsford	18.2%	0.0%	0.0%	33.0%	0.0%	0.0%	69.9%
Royston	2.7%	0.0%	0.0%	0.0%	57.7%	0.0%	0.0%
Harlow	0.7%	4.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Cambridge	15.2%	13.4%	0.0%	12.5%	19.2%	32.1%	0.0%
Bishops Stortford	13.1%	0.0%	81.7%	10.7%	0.0%	0.0%	4.8%
Braintree	3.8%	0.0%	0.0%	6.5%	0.0%	0.0%	15.0%
Bury St Edmunds	2.2%	0.0%	0.0%	0.0%	0.0%	7.3%	0.0%
Others outside the Study Area	5.8%	2.7%	0.0%	9.6%	11.5%	4.1%	10.3%
Outside Study Area Sub-total	**61.7%**	**20.4%**	**81.7%**	**72.3%**	**88.5%**	**43.5%**	**100.0%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:
a. Zones based on post code sectors
b. Market shares for shopping derived directly from NEMS Household Survey (2021)
c. Figures may not total due to rounding

Uttlesford Retail Capacity Study
Nexus Planning

Table 12: Small Media Items shopping expenditure

Destination	Total Media (£m)	Zone 1 Media (£m)	Zone 2 Media (£m)	Zone 3 Media (£m)	Zone 4 Media (£m)	Zone 5 Media (£m)	Zone 6 Media (£m)
Uttlesford District							
Saffron Walden Town Centre							
Saffron Walden town centre	£9.7	£6.0	£1.0	£0.5	£0.3	£1.9	£0.0
Waitrose, Hill Street, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Saffron Walden Out of Centre							
Aldi, Knight Park, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Homebase, Elizabeth Way, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Knight Park, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Shire Hill Industrial Estate, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Springwell Nursery & Garden Centre, Walden Road, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco, Radwinter Road, Saffron Walden	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
Stansted Mountfitchet Town Centre							
Stansted Mountfitchet village centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Express, Cambridge Road, Stansted Mountfitchet	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Stansted Mountfitchet Out of Centre							
Stansted Airport, Bassingbourn Road, Stansted	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
You're Furnished, Hall Road, Bamber's Green	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Dunmow Town Centre							
Great Dunmow town centre	£0.7	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0
Great Dunmow Out of Centre							
Langthorns Plantery, High Cross Lane West, Little Canfield, Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Chapel End Nursery, Broxted, Great Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco, Stortford Road, Great Dunmow	£0.5	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0
Travis Perkins, Chelmsford Road, Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Thaxted Town Centre	£0.0						
Thaxted town centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
	£0.0						
Local Centres/Villages	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Newport Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Ridgeons, Commercial Centre, Ashdon Road, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Co-op, The Heath, Hatfield Heath	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Takeley village centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
In-Centre Sub-total	**£10.5**	**£6.0**	**£1.0**	**£1.3**	**£0.3**	**£1.9**	**£0.0**
Uttrlesford District Sub-total	£11.2	£6.2	£1.0	£1.8	£0.3	£1.9	£0.0
Others in the Study Area							
Aldi, Lordscroft Lane, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Argos in Sainsbury's, Haycocks Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Cambridge Road Retail Park, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
CGS Carpet Warehouse, Boundary Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Civic Industrial Estate, Homefield Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Co-op, High Street, Sawston	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
David Holland Pharmacy, Norton Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Haverhill town centre	£3.1	£0.0	£0.0	£0.0	£0.0	£3.1	£0.0
Hollands Road Industrial Estate, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sainsbury's, Haycocks Road, Haverhill	£0.7	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0
Sturmer Nurseries, Church Walk, Sturmer, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Cangle Road, Haverhill	£0.6	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0
Pampisford Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sawston village centre	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Study Area Sub-Total	**£15.7**	**£6.2**	**£1.0**	**£1.8**	**£0.3**	**£6.3**	**£0.0**
Other Locations Outside Study Area							
Chelmsford	£7.7	£0.0	£0.0	£2.2	£0.0	£0.0	£5.5
Royston	£1.4	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0
Harlow	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0
Cambridge	£5.9	£1.0	£0.0	£0.8	£0.5	£3.6	£0.0
Bishops Stortford	£5.8	£0.0	£4.7	£0.7	£0.0	£0.0	£0.4
Braintree	£1.6	£0.0	£0.0	£0.4	£0.0	£0.0	£1.2
Bury St Edmunds	£0.8	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0
Others outside the Study Area	£2.4	£0.2	£0.0	£0.6	£0.3	£0.5	£0.8
Outside Study Area Sub-total	**£26.0**	**£1.6**	**£4.7**	**£4.7**	**£2.2**	**£4.9**	**£7.9**
Total	**£41.7**	**£7.8**	**£5.7**	**£6.6**	**£2.5**	**£11.2**	**£7.9**

Notes:
a. Zones based on post code sectors
b. Market shares for shopping derived directly from NEMS Household Survey (2021)
c. Figures may not total due to rounding

Table 13: Small Household Goods shopping patterns

Destination	Total H'hold (%)	Zone 1 H'hold (%)	Zone 2 H'hold (%)	Zone 3 H'hold (%)	Zone 4 H'hold (%)	Zone 5 H'hold (%)	Zone 6 H'hold (%)
Uttlesford District							
Saffron Walden Town Centre							
Saffron Walden town centre	6.3%	19.7%	2.1%	0.7%	2.2%	6.9%	1.3%
Waitrose, Hill Street, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Saffron Walden Out of Centre							
Aldi, Knight Park, Saffron Walden	0.4%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Elizabeth Way, Saffron Walden	0.6%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Knight Park, Saffron Walden	1.1%	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Shire Hill Industrial Estate, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Springwell Nursery & Garden Centre, Walden Road, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Radwinter Road, Saffron Walden	0.8%	3.2%	2.1%	0.0%	0.0%	0.0%	0.0%
Stansted Mountfitchet Town Centre							
Stansted Mountfitchet village centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Cambridge Road, Stansted Mountfitchet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stansted Mountfitchet Out of Centre							
Stansted Airport, Bassingbourn Road, Stansted	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
You're Furnished, Hall Road, Bamber's Green	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great Dunmow Town Centre							
Great Dunmow town centre	0.4%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%
Great Dunmow Out of Centre							
Langthorns Plantery, High Cross Lane West, Little Canfield, Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Chapel End Nursery, Broxted, Great Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Stortford Road, Great Dunmow	0.3%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%
Travis Perkins, Chelmsford Road, Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Thaxted Town Centre							
Thaxted town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Centres/Villages							
Newport Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ridgeons, Commercial Centre, Ashdon Road, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, The Heath, Hatfield Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Takeley village centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
In-Centre Sub-total	**6.7%**	**19.7%**	**2.1%**	**3.4%**	**2.2%**	**6.9%**	**1.3%**
Uttrlesford District Sub-total	9.9%	34.8%	4.2%	5.4%	2.2%	6.9%	1.3%
Others in the Study Area							
Aldi, Lordscroft Lane, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Argos in Sainsbury's, Haycocks Road, Haverhill	0.5%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%
Cambridge Road Retail Park, Haverhill	0.3%	0.0%	0.0%	0.0%	4.2%	0.0%	0.0%
CGS Carpet Warehouse, Boundary Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Civic Industrial Estate, Homefield Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, High Street, Sawston	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
David Holland Pharmacy, Norton Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Haverhill town centre	4.7%	1.7%	0.0%	0.0%	0.0%	13.8%	0.0%
Hollands Road Industrial Estate, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, Haycocks Road, Haverhill	2.1%	0.0%	0.0%	0.0%	0.0%	6.7%	0.0%
Sturmer Nurseries, Church Walk, Sturmer, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Cangle Road, Haverhill	0.6%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%
Pampisford Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sawston village centre	0.3%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%
Study Area Sub-Total	**18.4%**	**36.5%**	**4.2%**	**5.4%**	**6.5%**	**31.8%**	**1.3%**
Other Locations Outside Study Area							
Chelmsford	16.4%	0.0%	2.4%	45.9%	0.0%	0.0%	55.7%
Royston	2.4%	0.0%	0.0%	0.0%	30.4%	1.2%	0.0%
Harlow	4.7%	4.4%	26.1%	7.8%	3.4%	0.0%	0.0%
Cambridge	33.2%	48.4%	28.0%	13.3%	40.7%	47.5%	6.0%
Bishops Stortford	3.3%	2.4%	13.4%	5.2%	0.0%	0.0%	0.0%
Braintree	6.1%	0.0%	4.4%	11.4%	2.6%	1.1%	18.7%
Bury St Edmunds	5.0%	2.3%	0.0%	0.0%	0.0%	15.0%	0.0%
Others outside the Study Area	10.4%	6.1%	21.6%	11.0%	16.5%	3.5%	18.3%
Outside Study Area Sub-total	**81.6%**	**63.5%**	**95.8%**	**94.6%**	**93.5%**	**68.2%**	**98.7%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:
a. Zones based on post code sectors
b. Market shares for shopping derived directly from NEMS Household Survey (2021)
c. Figures may not total due to rounding

Table 14: Small Household Goods shopping expenditure

Destination	Total H'hold (£m)	Zone 1 H'hold (£m)	Zone 2 H'hold (£m)	Zone 3 H'hold (£m)	Zone 4 H'hold (£m)	Zone 5 H'hold (£m)	Zone 6 H'hold (£m)
Uttlesford District							
Saffron Walden Town Centre							
Saffron Walden town centre	£8.3	£4.8	£0.4	£0.2	£0.2	£2.4	£0.3
Waitrose, Hill Street, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Saffron Walden Out of Centre							
Aldi, Knight Park, Saffron Walden	£0.5	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0
Homebase, Elizabeth Way, Saffron Walden	£0.8	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0
Knight Park, Saffron Walden	£1.5	£1.5	£0.0	£0.0	£0.0	£0.0	£0.0
Shire Hill Industrial Estate, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Springwell Nursery & Garden Centre, Walden Road, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco, Radwinter Road, Saffron Walden	£1.2	£0.8	£0.4	£0.0	£0.0	£0.0	£0.0
Stansted Mountfitchet Town Centre							
Stansted Mountfitchet village centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Express, Cambridge Road, Stansted Mountfitchet	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Stansted Mountfitchet Out of Centre							
Stansted Airport, Bassingbourn Road, Stansted	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
You're Furnished, Hall Road, Bamber's Green	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Dunmow Town Centre							
Great Dunmow town centre	£0.6	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0
Great Dunmow Out of Centre	£0.0						
Langthorns Plantery, High Cross Lane West, Little Canfield, Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Chapel End Nursery, Broxted, Great Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco, Stortford Road, Great Dunmow	£0.4	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0
Travis Perkins, Chelmsford Road, Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Thaxted Town Centre	£0.0						
Thaxted town centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Centres/Villages	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Newport Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Ridgeons, Commercial Centre, Ashdon Road, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Co-op, The Heath, Hatfield Heath	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Takeley village centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
In-Centre Sub-total	**£8.9**	**£4.8**	**£0.4**	**£0.7**	**£0.2**	**£2.4**	**£0.3**
Uttrlesford District Sub-total	£13.4	£8.5	£0.8	£1.2	£0.2	£2.4	£0.3
Others in the Study Area							
Aldi, Lordscroft Lane, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Argos in Sainsbury's, Haycocks Road, Haverhill	£0.5	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0
Cambridge Road Retail Park, Haverhill	£0.3	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0
CGS Carpet Warehouse, Boundary Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Civic Industrial Estate, Homefield Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Co-op, High Street, Sawston	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
David Holland Pharmacy, Norton Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Haverhill town centre	£5.4	£0.4	£0.0	£0.0	£0.0	£4.9	£0.0
Hollands Road Industrial Estate, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sainsbury's, Haycocks Road, Haverhill	£2.4	£0.0	£0.0	£0.0	£0.0	£2.4	£0.0
Sturmer Nurseries, Church Walk, Sturmer, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Cangle Road, Haverhill	£0.6	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0
Pampisford Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sawston village centre	£0.4	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0
Study Area Sub-Total	**£23.1**	**£9.0**	**£0.8**	**£1.2**	**£0.5**	**£11.3**	**£0.3**
Other Locations Outside Study Area							
Chelmsford	£23.8	£0.0	£0.4	£9.7	£0.0	£0.0	£13.6
Royston	£2.9	£0.0	£0.0	£0.0	£2.5	£0.4	£0.0
Harlow	£7.8	£1.1	£4.8	£1.7	£0.3	£0.0	£0.0
Cambridge	£41.5	£11.9	£5.1	£2.8	£3.3	£16.9	£1.5
Bishops Stortford	£4.1	£0.6	£2.5	£1.1	£0.0	£0.0	£0.0
Braintree	£8.4	£0.0	£0.8	£2.4	£0.2	£0.4	£4.6
Bury St Edmunds	£5.9	£0.6	£0.0	£0.0	£0.0	£5.4	£0.0
Others outside the Study Area	£14.8	£1.5	£4.0	£2.3	£1.3	£1.2	£4.5
Outside Study Area Sub-total	**£109.3**	**£15.6**	**£17.6**	**£20.1**	**£7.6**	**£24.3**	**£24.1**
Total	**£132.4**	**£24.6**	**£18.3**	**£21.2**	**£8.2**	**£35.7**	**£24.4**

Notes:
a. Zones based on post code sectors
b. Market shares for shopping derived directly from NEMS Household Survey (2021)
c. Figures may not total due to rounding

Table 15: Recreation Goods shopping patterns

Destination	Total Recreation (%)	Zone 1 Recreation (%)	Zone 2 Recreation (%)	Zone 3 Recreation (%)	Zone 4 Recreation (%)	Zone 5 Recreation (%)	Zone 6 Recreation (%)
Uttlesford District							
Saffron Walden Town Centre							
Saffron Walden town centre	10.2%	48.0%	10.8%	1.1%	10.0%	2.9%	0.0%
Waitrose, Hill Street, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Saffron Walden Out of Centre							
Aldi, Knight Park, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Elizabeth Way, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Knight Park, Saffron Walden	1.4%	6.4%	0.0%	0.0%	0.0%	0.0%	1.9%
Shire Hill Industrial Estate, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Springwell Nursery & Garden Centre, Walden Road, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Radwinter Road, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stansted Mountfitchet Town Centre							
Stansted Mountfitchet village centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Cambridge Road, Stansted Mountfitchet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stansted Mountfitchet Out of Centre							
Stansted Airport, Bassingbourn Road, Stansted	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
You're Furnished, Hall Road, Bamber's Green	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great Dunmow Town Centre							
Great Dunmow town centre	1.2%	0.0%	0.0%	5.8%	0.0%	0.0%	0.0%
Great Dunmow Out of Centre							
Langthorns Plantery, High Cross Lane West, Little Canfield, Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Chapel End Nursery, Broxted, Great Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Stortford Road, Great Dunmow	0.2%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%
Travis Perkins, Chelmsford Road, Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Thaxted Town Centre							
Thaxted town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Centres/Villages							
Newport Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ridgeons, Commercial Centre, Ashdon Road, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, The Heath, Hatfield Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Takeley village centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
In-Centre Sub-total	**11.4%**	**48.0%**	**10.8%**	**6.9%**	**10.0%**	**2.9%**	**0.0%**
Uttrlesford District Sub-total	13.0%	54.4%	10.8%	7.9%	10.0%	2.9%	1.9%
Others in the Study Area							
Aldi, Lordscroft Lane, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Argos in Sainsbury's, Haycocks Road, Haverhill	1.4%	0.0%	0.0%	0.0%	0.0%	5.1%	0.0%
Cambridge Road Retail Park, Haverhill	2.2%	2.4%	0.0%	0.0%	0.0%	6.4%	0.0%
CGS Carpet Warehouse, Boundary Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Civic Industrial Estate, Homefield Road, Haverhill	0.4%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%
Co-op, High Street, Sawston	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
David Holland Pharmacy, Norton Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Haverhill town centre	6.1%	2.4%	0.0%	0.0%	0.0%	20.4%	0.0%
Hollands Road Industrial Estate, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, Haycocks Road, Haverhill	0.7%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%
Sturmer Nurseries, Church Walk, Sturmer, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Cangle Road, Haverhill	0.2%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%
Pampisford Village Centre	0.7%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Sawston village centre	0.2%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%
Study Area Sub-Total	**24.9%**	**63.5%**	**10.8%**	**7.9%**	**10.0%**	**40.3%**	**1.9%**
Other Locations Outside Study Area							
Chelmsford	23.8%	0.0%	5.7%	51.2%	0.0%	0.0%	43.1%
Royston	1.9%	1.2%	0.0%	0.0%	35.8%	0.0%	0.0%
Harlow	5.3%	4.0%	39.6%	2.1%	0.0%	0.0%	0.0%
Cambridge	22.3%	27.6%	13.6%	3.9%	37.6%	51.0%	4.6%
Bishops Stortford	4.7%	1.2%	22.4%	10.9%	0.0%	0.0%	0.0%
Braintree	10.1%	0.0%	0.0%	17.6%	0.0%	0.0%	31.6%
Bury St Edmunds	1.0%	0.0%	0.0%	0.0%	0.0%	3.5%	0.0%
Others outside the Study Area	6.0%	2.4%	7.9%	6.4%	16.7%	5.1%	18.8%
Outside Study Area Sub-total	**75.1%**	**36.5%**	**89.2%**	**92.1%**	**90.0%**	**59.7%**	**98.1%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:
a. Zones based on post code sectors
b. Market shares for shopping derived directly from NEMS Household Survey (2021)
c. Figures may not total due to rounding

Table 16: Recreation Goods shopping expenditure

Destination	Total Recreation (£m)	Zone 1 Recreation (£m)	Zone 2 Recreation (£m)	Zone 3 Recreation (£m)	Zone 4 Recreation (£m)	Zone 5 Recreation (£m)	Zone 6 Recreation (£m)
Uttlesford District							
Saffron Walden Town Centre							
Saffron Walden town centre	£12.7	£9.4	£1.6	£0.2	£0.7	£0.9	£0.0
Waitrose, Hill Street, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Saffron Walden Out of Centre							
Aldi, Knight Park, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Homebase, Elizabeth Way, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Knight Park, Saffron Walden	£1.6	£1.3	£0.0	£0.0	£0.0	£0.0	£0.4
Shire Hill Industrial Estate, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Springwell Nursery & Garden Centre, Walden Road, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco, Radwinter Road, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Stansted Mountfitchet Town Centre							
Stansted Mountfitchet village centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Express, Cambridge Road, Stansted Mountfitchet	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Stansted Mountfitchet Out of Centre							
Stansted Airport, Bassingbourn Road, Stansted	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
You're Furnished, Hall Road, Bamber's Green	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Dunmow Town Centre							
Great Dunmow town centre	£1.0	£0.0	£0.0	£1.0	£0.0	£0.0	£0.0
Great Dunmow Out of Centre							
Langthorns Plantery, High Cross Lane West, Little Canfield, Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Chapel End Nursery, Broxted, Great Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco, Stortford Road, Great Dunmow	£0.2	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0
Travis Perkins, Chelmsford Road, Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Thaxted Town Centre							
Thaxted town centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Centres/Villages	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Newport Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Ridgeons, Commercial Centre, Ashdon Road, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Co-op, The Heath, Hatfield Heath	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Takeley village centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
In-Centre Sub-total	**£13.7**	**£9.4**	**£1.6**	**£1.2**	**£0.7**	**£0.9**	**£0.0**
Uttrlesford District Sub-total	£15.5	£10.6	£1.6	£1.4	£0.7	£0.9	£0.4
Others in the Study Area							
Aldi, Lordscroft Lane, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Argos in Sainsbury's, Haycocks Road, Haverhill	£1.5	£0.0	£0.0	£0.0	£0.0	£1.5	£0.0
Cambridge Road Retail Park, Haverhill	£2.4	£0.5	£0.0	£0.0	£0.0	£1.9	£0.0
CGS Carpet Warehouse, Boundary Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Civic Industrial Estate, Homefield Road, Haverhill	£0.5	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0
Co-op, High Street, Sawston	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
David Holland Pharmacy, Norton Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Haverhill town centre	£6.5	£0.5	£0.0	£0.0	£0.0	£6.1	£0.0
Hollands Road Industrial Estate, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sainsbury’s, Haycocks Road, Haverhill	£0.7	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0
Sturmer Nurseries, Church Walk, Sturmer, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Cangle Road, Haverhill	£0.2	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0
Pampisford Village Centre	£0.8	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0
Sawston village centre	£0.2	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0
Study Area Sub-Total	**£28.4**	**£12.4**	**£1.6**	**£1.4**	**£0.7**	**£12.0**	**£0.4**
Other Locations Outside Study Area							
Chelmsford	£18.5	£0.0	£0.9	£9.0	£0.0	£0.0	£8.7
Royston	£2.6	£0.2	£0.0	£0.0	£2.4	£0.0	£0.0
Harlow	£7.1	£0.8	£5.9	£0.4	£0.0	£0.0	£0.0
Cambridge	£26.7	£5.4	£2.0	£0.7	£2.5	£15.1	£0.9
Bishops Stortford	£5.5	£0.2	£3.4	£1.9	£0.0	£0.0	£0.0
Braintree	£9.4	£0.0	£0.0	£3.1	£0.0	£0.0	£6.3
Bury St Edmunds	£1.1	£0.0	£0.0	£0.0	£0.0	£1.1	£0.0
Others outside the Study Area	£9.2	£0.5	£1.2	£1.1	£1.1	£1.5	£3.8
Outside Study Area Sub-total	**£80.0**	**£7.1**	**£13.4**	**£16.1**	**£6.0**	**£17.7**	**£19.7**
Total	**£108.5**	**£19.5**	**£15.0**	**£17.5**	**£6.6**	**£29.7**	**£20.1**

Notes:
a. Zones based on post code sectors
b. Market shares for shopping derived directly from NEMS Household Survey (2021)
c. Figures may not total due to rounding

Uttlesford Retail Capacity Study
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Table 17: Chemist Goods shopping patterns

Destination	Total Chemist (%)	Zone 1 Chemist (%)	Zone 2 Chemist (%)	Zone 3 Chemist (%)	Zone 4 Chemist (%)	Zone 5 Chemist (%)	Zone 6 Chemist (%)
Uttlesford District							
Saffron Walden Town Centre							
Saffron Walden town centre	21.8%	87.5%	6.0%	5.4%	3.4%	10.1%	2.5%
Waitrose, Hill Street, Saffron Walden	0.4%	0.6%	0.0%	0.0%	1.7%	0.7%	0.0%
Saffron Walden Out of Centre							
Aldi, Knight Park, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Elizabeth Way, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Knight Park, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Shire Hill Industrial Estate, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Springwell Nursery & Garden Centre, Walden Road, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Radwinter Road, Saffron Walden	0.6%	1.6%	1.0%	0.8%	0.0%	0.0%	0.0%
Stansted Mountfitchet Town Centre							
Stansted Mountfitchet village centre	3.2%	0.7%	23.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Cambridge Road, Stansted Mountfitchet	0.1%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%
Stansted Mountfitchet Out of Centre							
Stansted Airport, Bassingbourn Road, Stansted	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
You're Furnished, Hall Road, Bamber's Green	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great Dunmow Town Centre							
Great Dunmow town centre	7.8%	0.0%	2.6%	40.4%	0.0%	0.0%	4.5%
Great Dunmow Out of Centre							
Langthorns Plantery, High Cross Lane West, Little Canfield, Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Chapel End Nursery, Broxted, Great Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Stortford Road, Great Dunmow	2.9%	0.0%	4.3%	13.0%	0.0%	0.0%	1.2%
Travis Perkins, Chelmsford Road, Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Thaxted Town Centre							
Thaxted town centre	1.1%	1.2%	0.0%	5.2%	0.0%	0.0%	0.0%
Local Centres/Villages							
Newport Village Centre	0.5%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Ridgeons, Commercial Centre, Ashdon Road, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, The Heath, Hatfield Heath	0.1%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%
Takeley village centre	0.6%	0.0%	2.6%	1.6%	0.0%	0.0%	0.0%
In-Centre Sub-total	**35.6%**	**92.4%**	**35.4%**	**52.6%**	**5.2%**	**10.8%**	**7.0%**
Uttrlesford District Sub-total	39.1%	94.1%	40.7%	66.4%	5.2%	10.8%	8.2%
Others in the Study Area							
Aldi, Lordscroft Lane, Haverhill	0.2%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%
Argos in Sainsbury's, Haycocks Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cambridge Road Retail Park, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
CGS Carpet Warehouse, Boundary Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Civic Industrial Estate, Homefield Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, High Street, Sawston	0.1%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%
David Holland Pharmacy, Norton Road, Haverhill	0.1%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%
Haverhill town centre	11.2%	0.7%	0.0%	0.0%	0.0%	40.8%	0.0%
Hollands Road Industrial Estate, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, Haycocks Road, Haverhill	2.3%	0.0%	0.0%	0.0%	0.0%	8.4%	0.0%
Sturmer Nurseries, Church Walk, Sturmer, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Cangle Road, Haverhill	2.5%	0.0%	0.0%	0.0%	0.0%	9.1%	0.0%
Pampisford Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sawston village centre	2.2%	0.0%	0.0%	0.0%	0.9%	7.7%	0.0%
Study Area Sub-Total	**57.6%**	**94.7%**	**40.7%**	**66.4%**	**6.0%**	**78.1%**	**8.2%**
Other Locations Outside Study Area							
Chelmsford	11.0%	0.0%	1.2%	15.7%	0.0%	0.0%	46.7%
Royston	3.4%	1.1%	0.0%	0.0%	81.0%	0.5%	0.0%
Harlow	1.7%	1.1%	10.5%	0.4%	0.0%	0.0%	0.0%
Cambridge	6.0%	1.7%	0.0%	1.2%	12.1%	17.2%	0.0%
Bishops Stortford	8.2%	1.3%	45.2%	9.4%	0.0%	0.7%	1.2%
Braintree	7.9%	0.0%	0.0%	5.6%	0.0%	0.0%	39.5%
Bury St Edmunds	0.1%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%
Others outside the Study Area	4.2%	0.0%	2.4%	1.4%	0.9%	3.2%	4.4%
Outside Study Area Sub-total	**42.4%**	**5.3%**	**59.3%**	**33.6%**	**94.0%**	**21.9%**	**91.8%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:
a. Zones based on post code sectors
b. Market shares for shopping derived directly from NEMS Household Survey (2021)
c. Figures may not total due to rounding

Uttlesford Retail Capacity Study
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Table 18: Chemist Goods shopping expenditure

Destination	Total Chemist (£m)	Zone 1 Chemist (£m)	Zone 2 Chemist (£m)	Zone 3 Chemist (£m)	Zone 4 Chemist (£m)	Zone 5 Chemist (£m)	Zone 6 Chemist (£m)
Uttlesford District							
Saffron Walden Town Centre							
Saffron Walden town centre	£9.7	£7.5	£0.4	£0.4	£0.1	£1.1	£0.2
Waitrose, Hill Street, Saffron Walden	£0.2	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0
Saffron Walden Out of Centre							
Aldi, Knight Park, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Homebase, Elizabeth Way, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Knight Park, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Shire Hill Industrial Estate, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Springwell Nursery & Garden Centre, Walden Road, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco, Radwinter Road, Saffron Walden	£0.3	£0.1	£0.1	£0.1	£0.0	£0.0	£0.0
Stansted Mountfitchet Town Centre							
Stansted Mountfitchet village centre	£1.4	£0.1	£1.4	£0.0	£0.0	£0.0	£0.0
Tesco Express, Cambridge Road, Stansted Mountfitchet	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Stansted Mountfitchet Out of Centre							
Stansted Airport, Bassingbourn Road, Stansted	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
You're Furnished, Hall Road, Bamber's Green	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Dunmow Town Centre							
Great Dunmow town centre	£3.4	£0.0	£0.2	£2.8	£0.0	£0.0	£0.4
Great Dunmow Out of Centre							
Langthorns Plantery, High Cross Lane West, Little Canfield, Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Chapel End Nursery, Broxted, Great Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco, Stortford Road, Great Dunmow	£1.3	£0.0	£0.3	£0.9	£0.0	£0.0	£0.1
Travis Perkins, Chelmsford Road, Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Thaxted Town Centre							
Thaxted town centre	£0.5	£0.1	£0.0	£0.4	£0.0	£0.0	£0.0
Local Centres/Villages	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Newport Village Centre	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
Ridgeons, Commercial Centre, Ashdon Road, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Co-op, The Heath, Hatfield Heath	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Takeley village centre	£0.3	£0.0	£0.2	£0.1	£0.0	£0.0	£0.0
In-Centre Sub-total	**£15.7**	**£8.0**	**£2.1**	**£3.7**	**£0.1**	**£1.2**	**£0.6**
Uttrlesford District Sub-total	£17.2	£8.1	£2.5	£4.6	£0.1	£1.2	£0.7
Others in the Study Area							
Aldi, Lordscroft Lane, Haverhill	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Argos in Sainsbury's, Haycocks Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Cambridge Road Retail Park, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
CGS Carpet Warehouse, Boundary Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Civic Industrial Estate, Homefield Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Co-op, High Street, Sawston	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
David Holland Pharmacy, Norton Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Haverhill town centre	£4.6	£0.1	£0.0	£0.0	£0.0	£4.5	£0.0
Hollands Road Industrial Estate, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sainsbury's, Haycocks Road, Haverhill	£0.9	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0
Sturmer Nurseries, Church Walk, Sturmer, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Cangle Road, Haverhill	£1.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.0
Pampisford Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sawston village centre	£0.9	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0
Study Area Sub-Total	**£24.7**	**£8.2**	**£2.5**	**£4.6**	**£0.2**	**£8.6**	**£0.7**
Other Locations Outside Study Area							
Chelmsford	£5.1	£0.0	£0.1	£1.1	£0.0	£0.0	£4.0
Royston	£2.4	£0.1	£0.0	£0.0	£2.3	£0.1	£0.0
Harlow	£0.8	£0.1	£0.6	£0.0	£0.0	£0.0	£0.0
Cambridge	£2.5	£0.1	£0.0	£0.1	£0.3	£1.9	£0.0
Bishops Stortford	£3.7	£0.1	£2.7	£0.7	£0.0	£0.1	£0.1
Braintree	£3.8	£0.0	£0.0	£0.4	£0.0	£0.0	£3.4
Bury St Edmunds	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Others outside the Study Area	£1.0	£0.0	£0.1	£0.1	£0.0	£0.4	£0.4
Outside Study Area Sub-total	**£19.3**	**£0.5**	**£3.6**	**£2.4**	**£2.7**	**£2.4**	**£7.8**
Total	**£44.0**	**£8.6**	**£6.0**	**£7.0**	**£2.8**	**£11.0**	**£8.5**

Notes:
a. Zones based on post code sectors
b. Market shares for shopping derived directly from NEMS Household Survey (2021)
c. Figures may not total due to rounding

Uttlesford Retail Capacity Study
Nexus Planning

Table 19: Electrical Goods shopping patterns

Destination	Total Electrical (%)	Zone 1 Electrical (%)	Zone 2 Electrical (%)	Zone 3 Electrical (%)	Zone 4 Electrical (%)	Zone 5 Electrical (%)	Zone 6 Electrical (%)
Uttlesford District							
Saffron Walden Town Centre							
Saffron Walden town centre	2.7%	19.5%	0.0%	1.9%	0.0%	0.0%	0.0%
Waitrose, Hill Street, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Saffron Walden Out of Centre							
Aldi, Knight Park, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Elizabeth Way, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Knight Park, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Shire Hill Industrial Estate, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Springwell Nursery & Garden Centre, Walden Road, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Radwinter Road, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stansted Mountfitchet Town Centre							
Stansted Mountfitchet village centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Cambridge Road, Stansted Mountfitchet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stansted Mountfitchet Out of Centre							
Stansted Airport, Bassingbourn Road, Stansted	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
You're Furnished, Hall Road, Bamber's Green	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great Dunmow Town Centre							
Great Dunmow town centre	0.1%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%
Great Dunmow Out of Centre							
Langthorns Plantery, High Cross Lane West, Little Canfield, Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Chapel End Nursery, Broxted, Great Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Stortford Road, Great Dunmow	0.8%	0.0%	0.0%	5.3%	0.0%	0.0%	0.0%
Travis Perkins, Chelmsford Road, Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Thaxted Town Centre							
Thaxted town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Centres/Villages							
Newport Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ridgeons, Commercial Centre, Ashdon Road, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, The Heath, Hatfield Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Takeley village centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
In-Centre Sub-total	**2.8%**	**19.5%**	**0.0%**	**2.8%**	**0.0%**	**0.0%**	**0.0%**
Uttrlesford District Sub-total	3.6%	19.5%	0.0%	8.1%	0.0%	0.0%	0.0%
Others in the Study Area							
Aldi, Lordscroft Lane, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Argos in Sainsbury's, Haycocks Road, Haverhill	1.6%	2.6%	0.0%	0.0%	0.0%	3.4%	0.0%
Cambridge Road Retail Park, Haverhill	0.8%	1.0%	0.0%	0.0%	0.0%	1.8%	0.0%
CGS Carpet Warehouse, Boundary Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Civic Industrial Estate, Homefield Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, High Street, Sawston	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
David Holland Pharmacy, Norton Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Haverhill town centre	12.9%	4.5%	0.0%	0.0%	0.0%	33.6%	0.0%
Hollands Road Industrial Estate, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury’s, Haycocks Road, Haverhill	1.1%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%
Sturmer Nurseries, Church Walk, Sturmer, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Cangle Road, Haverhill	0.4%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%
Pampisford Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sawston village centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Study Area Sub-Total	**20.3%**	**27.5%**	**0.0%**	**8.1%**	**0.0%**	**42.7%**	**0.0%**
Other Locations Outside Study Area							
Chelmsford	21.1%	0.0%	0.0%	57.3%	0.0%	0.0%	65.5%
Royston	2.6%	3.2%	0.0%	0.0%	30.6%	0.0%	0.0%
Harlow	7.0%	4.3%	52.4%	9.9%	0.0%	0.0%	0.0%
Cambridge	36.3%	58.2%	34.7%	7.1%	57.8%	52.5%	6.2%
Bishops Stortford	1.2%	1.7%	5.9%	2.5%	1.3%	0.0%	0.0%
Braintree	4.6%	0.0%	0.0%	12.6%	0.0%	0.0%	14.4%
Bury St Edmunds	0.6%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%
Others outside the Study Area	6.3%	5.1%	7.0%	2.5%	10.3%	3.1%	13.9%
Outside Study Area Sub-total	**79.7%**	**72.5%**	**100.0%**	**91.9%**	**100.0%**	**57.3%**	**100.0%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:
a. Zones based on post code sectors
b. Market shares for shopping derived directly from NEMS Household Survey (2021)
c. Figures may not total due to rounding

Uttlesford Retail Capacity Study
Nexus Planning

Table 20: Electrical Goods shopping expenditure

Destination	Total Electrical (£m)	Zone 1 Electrical (£m)	Zone 2 Electrical (£m)	Zone 3 Electrical (£m)	Zone 4 Electrical (£m)	Zone 5 Electrical (£m)	Zone 6 Electrical (£m)
Uttlesford District							
Saffron Walden Town Centre							
Saffron Walden town centre	£3.6	£3.3	£0.0	£0.3	£0.0	£0.0	£0.0
Waitrose, Hill Street, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Saffron Walden Out of Centre							
Aldi, Knight Park, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Homebase, Elizabeth Way, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Knight Park, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Shire Hill Industrial Estate, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Springwell Nursery & Garden Centre, Walden Road, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco, Radwinter Road, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Stansted Mountfitchet Town Centre							
Stansted Mountfitchet village centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Express, Cambridge Road, Stansted Mountfitchet	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Stansted Mountfitchet Out of Centre							
Stansted Airport, Bassingbourn Road, Stansted	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
You're Furnished, Hall Road, Bamber's Green	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Dunmow Town Centre							
Great Dunmow town centre	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0
Great Dunmow Out of Centre							
Langthorns Plantery, High Cross Lane West, Little Canfield, Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Chapel End Nursery, Broxted, Great Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco, Stortford Road, Great Dunmow	£0.8	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0
Travis Perkins, Chelmsford Road, Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Thaxted Town Centre							
Thaxted town centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Centres/Villages	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Newport Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Ridgeons, Commercial Centre, Ashdon Road, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Co-op, The Heath, Hatfield Heath	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Takeley village centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
In-Centre Sub-total	**£3.7**	**£3.3**	**£0.0**	**£0.4**	**£0.0**	**£0.0**	**£0.0**
Uttrlesford District Sub-total	£4.5	£3.3	£0.0	£1.1	£0.0	£0.0	£0.0
Others in the Study Area							
Aldi, Lordscroft Lane, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Argos in Sainsbury's, Haycocks Road, Haverhill	£1.3	£0.4	£0.0	£0.0	£0.0	£0.8	£0.0
Cambridge Road Retail Park, Haverhill	£0.6	£0.2	£0.0	£0.0	£0.0	£0.4	£0.0
CGS Carpet Warehouse, Boundary Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Civic Industrial Estate, Homefield Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Co-op, High Street, Sawston	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
David Holland Pharmacy, Norton Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Haverhill town centre	£9.0	£0.8	£0.0	£0.0	£0.0	£8.3	£0.0
Hollands Road Industrial Estate, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sainsbury’s, Haycocks Road, Haverhill	£0.7	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0
Sturmer Nurseries, Church Walk, Sturmer, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Cangle Road, Haverhill	£0.3	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0
Pampisford Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sawston village centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Study Area Sub-Total	**£16.4**	**£4.7**	**£0.0**	**£1.1**	**£0.0**	**£10.5**	**£0.0**
Other Locations Outside Study Area							
Chelmsford	£19.1	£0.0	£0.0	£8.1	£0.0	£0.0	£11.0
Royston	£2.2	£0.5	£0.0	£0.0	£1.7	£0.0	£0.0
Harlow	£8.8	£0.7	£6.6	£1.4	£0.0	£0.0	£0.0
Cambridge	£32.4	£9.9	£4.4	£1.0	£3.1	£12.9	£1.1
Bishops Stortford	£1.5	£0.3	£0.7	£0.4	£0.1	£0.0	£0.0
Braintree	£4.2	£0.0	£0.0	£1.8	£0.0	£0.0	£2.4
Bury St Edmunds	£0.4	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0
Others outside the Study Area	£5.8	£0.9	£0.9	£0.4	£0.6	£0.8	£2.3
Outside Study Area Sub-total	**£74.4**	**£12.4**	**£12.6**	**£13.0**	**£5.4**	**£14.1**	**£16.8**
Total	**£90.7**	**£17.1**	**£12.6**	**£14.2**	**£5.4**	**£24.6**	**£16.8**

Notes:
a. Zones based on post code sectors
b. Market shares for shopping derived directly from NEMS Household Survey (2021)
c. Figures may not total due to rounding

Table 21: DIY and Gardening shopping patterns

Destination	Total DIY (%)	Zone 1 DIY (%)	Zone 2 DIY (%)	Zone 3 DIY (%)	Zone 4 DIY (%)	Zone 5 DIY (%)	Zone 6 DIY (%)
Uttlesford District							
Saffron Walden Town Centre							
Saffron Walden town centre	3.3%	9.9%	0.0%	1.9%	3.8%	3.4%	0.7%
Waitrose, Hill Street, Saffron Walden	0.1%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Saffron Walden Out of Centre							
Aldi, Knight Park, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Elizabeth Way, Saffron Walden	12.2%	65.1%	0.0%	2.8%	5.0%	1.1%	2.9%
Knight Park, Saffron Walden	0.4%	1.4%	0.0%	0.0%	0.0%	0.5%	0.0%
Shire Hill Industrial Estate, Saffron Walden	0.2%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Springwell Nursery & Garden Centre, Walden Road, Saffron Walden	0.5%	0.8%	0.7%	0.0%	0.0%	0.8%	0.0%
Tesco, Radwinter Road, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stansted Mountfitchet Town Centre							
Stansted Mountfitchet village centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Cambridge Road, Stansted Mountfitchet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stansted Mountfitchet Out of Centre							
Stansted Airport, Bassingbourn Road, Stansted	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
You're Furnished, Hall Road, Bamber's Green	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great Dunmow Town Centre							
Great Dunmow town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great Dunmow Out of Centre							
Langthorns Plantery, High Cross Lane West, Little Canfield, Dunmow	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
Chapel End Nursery, Broxted, Great Dunmow	0.3%	0.0%	0.7%	1.3%	0.0%	0.0%	0.0%
Tesco, Stortford Road, Great Dunmow	0.1%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%
Travis Perkins, Chelmsford Road, Dunmow	0.1%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%
Thaxted Town Centre							
Thaxted town centre	0.3%	0.7%	0.0%	1.5%	0.0%	0.0%	0.0%
Local Centres/Villages							
Newport Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ridgeons, Commercial Centre, Ashdon Road, Saffron Walden	0.4%	1.9%	0.0%	0.0%	1.0%	0.0%	0.0%
Co-op, The Heath, Hatfield Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Takeley village centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
In-Centre Sub-total	**4.1%**	**13.2%**	**0.0%**	**3.4%**	**4.8%**	**3.4%**	**0.7%**
Uttrlesford District Sub-total	18.0%	82.0%	1.3%	8.5%	9.8%	5.8%	4.7%
Others in the Study Area							
Aldi, Lordscroft Lane, Haverhill	0.2%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%
Argos in Sainsbury's, Haycocks Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cambridge Road Retail Park, Haverhill	16.0%	1.6%	0.0%	0.0%	0.0%	51.0%	0.0%
CGS Carpet Warehouse, Boundary Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Civic Industrial Estate, Homefield Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, High Street, Sawston	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
David Holland Pharmacy, Norton Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Haverhill town centre	2.5%	0.0%	0.0%	0.0%	0.0%	8.1%	0.0%
Hollands Road Industrial Estate, Haverhill	0.9%	0.8%	0.0%	0.0%	0.0%	2.5%	0.0%
Sainsbury's, Haycocks Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sturmer Nurseries, Church Walk, Sturmer, Haverhill	0.2%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%
Tesco Superstore, Cangle Road, Haverhill	0.2%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%
Pampisford Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sawston village centre	2.3%	0.7%	0.0%	0.0%	0.0%	7.0%	0.0%
Study Area Sub-Total	**40.1%**	**85.1%**	**1.3%**	**8.5%**	**9.8%**	**75.8%**	**4.7%**
Other Locations Outside Study Area							
Chelmsford	11.3%	1.4%	0.0%	12.5%	0.0%	0.4%	45.7%
Royston	3.4%	1.8%	0.0%	0.0%	57.5%	0.9%	0.0%
Harlow	3.1%	1.4%	15.7%	5.2%	2.7%	0.0%	0.0%
Cambridge	9.0%	6.4%	0.7%	1.3%	18.1%	21.7%	0.0%
Bishops Stortford	12.7%	4.0%	77.7%	14.7%	0.0%	0.0%	1.2%
Braintree	18.3%	0.0%	2.9%	57.8%	0.0%	0.0%	45.8%
Bury St Edmunds	0.3%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%
Others outside the Study Area	1.7%	0.0%	1.7%	0.0%	11.9%	0.3%	2.5%
Outside Study Area Sub-total	**59.9%**	**14.9%**	**98.7%**	**91.5%**	**90.2%**	**24.2%**	**95.3%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:
a. Zones based on post code sectors
b. Market shares for shopping derived directly from NEMS Household Survey (2021)
c. Figures may not total due to rounding

Uttlesford Retail Capacity Study
Nexus Planning

Table 22: DIY and Gardening shopping expenditure

Destination	Total DIY (£m)	Zone 1 DIY (£m)	Zone 2 DIY (£m)	Zone 3 DIY (£m)	Zone 4 DIY (£m)	Zone 5 DIY (£m)	Zone 6 DIY (£m)
Uttlesford District							
Saffron Walden Town Centre							
Saffron Walden town centre	£1.5	£0.8	£0.0	£0.1	£0.1	£0.4	£0.1
Waitrose, Hill Street, Saffron Walden	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Saffron Walden Out of Centre							
Aldi, Knight Park, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Homebase, Elizabeth Way, Saffron Walden	£6.1	£5.4	£0.0	£0.2	£0.1	£0.1	£0.2
Knight Park, Saffron Walden	£0.2	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0
Shire Hill Industrial Estate, Saffron Walden	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Springwell Nursery & Garden Centre, Walden Road, Saffron Walden	£0.2	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0
Tesco, Radwinter Road, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Stansted Mountfitchet Town Centre							
Stansted Mountfitchet village centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Express, Cambridge Road, Stansted Mountfitchet	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Stansted Mountfitchet Out of Centre							
Stansted Airport, Bassingbourn Road, Stansted	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
You're Furnished, Hall Road, Bamber's Green	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Dunmow Town Centre							
Great Dunmow town centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Dunmow Out of Centre							
Langthorns Plantery, High Cross Lane West, Little Canfield, Dunmow	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Chapel End Nursery, Broxted, Great Dunmow	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0
Tesco, Stortford Road, Great Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Travis Perkins, Chelmsford Road, Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Thaxted Town Centre							
Thaxted town centre	£0.2	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0
Local Centres/Villages	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Newport Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Ridgeons, Commercial Centre, Ashdon Road, Saffron Walden	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
Co-op, The Heath, Hatfield Heath	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Takeley village centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
In-Centre Sub-total	**£1.9**	**£1.1**	**£0.0**	**£0.2**	**£0.1**	**£0.4**	**£0.1**
Uttrlesford District Sub-total	£8.7	£6.8	£0.1	£0.6	£0.3	£0.6	£0.4
Others in the Study Area							
Aldi, Lordscroft Lane, Haverhill	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Argos in Sainsbury's, Haycocks Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Cambridge Road Retail Park, Haverhill	£5.5	£0.1	£0.0	£0.0	£0.0	£5.4	£0.0
CGS Carpet Warehouse, Boundary Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Civic Industrial Estate, Homefield Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Co-op, High Street, Sawston	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
David Holland Pharmacy, Norton Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Haverhill town centre	£0.9	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0
Hollands Road Industrial Estate, Haverhill	£0.3	£0.1	£0.0	£0.0	£0.0	£0.3	£0.0
Sainsbury's, Haycocks Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sturmer Nurseries, Church Walk, Sturmer, Haverhill	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Tesco Superstore, Cangle Road, Haverhill	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Pampisford Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sawston village centre	£0.8	£0.1	£0.0	£0.0	£0.0	£0.7	£0.0
Study Area Sub-Total	**£16.4**	**£7.1**	**£0.1**	**£0.6**	**£0.3**	**£8.0**	**£0.4**
Other Locations Outside Study Area							
Chelmsford	£4.7	£0.1	£0.0	£0.9	£0.0	£0.0	£3.7
Royston	£1.9	£0.1	£0.0	£0.0	£1.6	£0.1	£0.0
Harlow	£1.5	£0.1	£0.9	£0.4	£0.1	£0.0	£0.0
Cambridge	£3.5	£0.5	£0.0	£0.1	£0.5	£2.3	£0.0
Bishops Stortford	£6.1	£0.3	£4.7	£1.0	£0.0	£0.0	£0.1
Braintree	£7.8	£0.0	£0.2	£4.0	£0.0	£0.0	£3.7
Bury St Edmunds	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Others outside the Study Area	£0.7	£0.0	£0.1	£0.0	£0.3	£0.0	£0.2
Outside Study Area Sub-total	**£26.2**	**£1.2**	**£5.9**	**£6.3**	**£2.6**	**£2.5**	**£7.6**
Total	**£42.6**	**£8.3**	**£6.0**	**£6.9**	**£2.8**	**£10.5**	**£8.0**

Notes:
a. Zones based on post code sectors
b. Market shares for shopping derived directly from NEMS Household Survey (2021)
c. Figures may not total due to rounding

Uttlesford Retail Capacity Study
Nexus Planning

Table 23: Furniture shopping patterns

Destination	Total Furniture (%)	Zone 1 Furniture (%)	Zone 2 Furniture (%)	Zone 3 Furniture (%)	Zone 4 Furniture (%)	Zone 5 Furniture (%)	Zone 6 Furniture (%)
Uttlesford District							
Saffron Walden Town Centre							
Saffron Walden town centre	8.7%	38.5%	4.2%	2.7%	2.6%	2.9%	0.7%
Waitrose, Hill Street, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Saffron Walden Out of Centre							
Aldi, Knight Park, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Elizabeth Way, Saffron Walden	0.4%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Knight Park, Saffron Walden	0.4%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Shire Hill Industrial Estate, Saffron Walden	0.5%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Springwell Nursery & Garden Centre, Walden Road, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Radwinter Road, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stansted Mountfitchet Town Centre							
Stansted Mountfitchet village centre	0.1%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%
Tesco Express, Cambridge Road, Stansted Mountfitchet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stansted Mountfitchet Out of Centre							
Stansted Airport, Bassingbourn Road, Stansted	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
You're Furnished, Hall Road, Bamber's Green	0.8%	0.0%	0.0%	2.9%	0.0%	0.0%	1.3%
Great Dunmow Town Centre							
Great Dunmow town centre	3.9%	2.3%	1.4%	18.8%	0.0%	0.0%	0.7%
Great Dunmow Out of Centre							
Langthorns Plantery, High Cross Lane West, Little Canfield, Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Chapel End Nursery, Broxted, Great Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Stortford Road, Great Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Travis Perkins, Chelmsford Road, Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Thaxted Town Centre							
Thaxted town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Centres/Villages							
Newport Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ridgeons, Commercial Centre, Ashdon Road, Saffron Walden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, The Heath, Hatfield Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Takeley village centre	0.1%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%
In-Centre Sub-total	**12.8%**	**40.8%**	**5.6%**	**22.9%**	**2.6%**	**2.9%**	**1.3%**
Uttrlesford District Sub-total	14.8%	48.0%	5.6%	25.8%	2.6%	2.9%	2.6%
Others in the Study Area							
Aldi, Lordscroft Lane, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Argos in Sainsbury's, Haycocks Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cambridge Road Retail Park, Haverhill	1.8%	0.6%	1.4%	0.0%	1.5%	4.6%	0.0%
CGS Carpet Warehouse, Boundary Road, Haverhill	0.5%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%
Civic Industrial Estate, Homefield Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, High Street, Sawston	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
David Holland Pharmacy, Norton Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Haverhill town centre	7.4%	1.7%	0.0%	0.0%	0.0%	22.7%	0.0%
Hollands Road Industrial Estate, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, Haycocks Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sturmer Nurseries, Church Walk, Sturmer, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Cangle Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Pampisford Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sawston village centre	0.7%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%
Study Area Sub-Total	**25.2%**	**50.3%**	**7.0%**	**25.8%**	**4.1%**	**34.0%**	**2.6%**
Other Locations Outside Study Area							
Chelmsford	15.6%	1.7%	2.8%	22.2%	0.0%	0.0%	58.8%
Royston	0.8%	0.0%	0.0%	0.0%	14.5%	0.0%	0.0%
Harlow	5.5%	1.2%	41.8%	7.4%	4.0%	0.0%	0.0%
Cambridge	24.5%	37.9%	17.9%	6.9%	40.6%	40.0%	1.1%
Bishops Stortford	2.5%	0.0%	16.8%	5.5%	0.0%	0.0%	0.0%
Braintree	8.9%	2.0%	0.0%	24.9%	0.0%	1.0%	20.4%
Bury St Edmunds	7.3%	2.3%	0.0%	0.7%	1.5%	21.2%	0.0%
Others outside the Study Area	9.7%	4.5%	13.7%	6.6%	35.3%	3.8%	17.1%
Outside Study Area Sub-total	**74.8%**	**49.7%**	**93.0%**	**74.2%**	**95.9%**	**66.0%**	**97.4%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:
a. Zones based on post code sectors
b. Market shares for shopping derived directly from NEMS Household Survey (2021)
c. Figures may not total due to rounding

Table 24: Furniture shopping expenditure

Destination	Total Furniture (£m)	Zone 1 Furniture (£m)	Zone 2 Furniture (£m)	Zone 3 Furniture (£m)	Zone 4 Furniture (£m)	Zone 5 Furniture (£m)	Zone 6 Furniture (£m)
Uttlesford District							
Saffron Walden Town Centre							
Saffron Walden town centre	£3.2	£2.5	£0.2	£0.1	£0.1	£0.2	£0.0
Waitrose, Hill Street, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Saffron Walden Out of Centre							
Aldi, Knight Park, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Homebase, Elizabeth Way, Saffron Walden	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Knight Park, Saffron Walden	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
Shire Hill Industrial Estate, Saffron Walden	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
Springwell Nursery & Garden Centre, Walden Road, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco, Radwinter Road, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
		£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Stansted Mountfitchet Town Centre							
Stansted Mountfitchet village centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Express, Cambridge Road, Stansted Mountfitchet	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Stansted Mountfitchet Out of Centre							
Stansted Airport, Bassingbourn Road, Stansted	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
You're Furnished, Hall Road, Bamber's Green	£0.2	£0.0	£0.0	£0.2	£0.0	£0.0	£0.1
Great Dunmow Town Centre							
Great Dunmow town centre	£1.3	£0.2	£0.1	£1.0	£0.0	£0.0	£0.0
Great Dunmow Out of Centre							
Langthorns Plantery, High Cross Lane West, Little Canfield, Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Chapel End Nursery, Broxted, Great Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco, Stortford Road, Great Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Travis Perkins, Chelmsford Road, Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Thaxted Town Centre		£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Thaxted town centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Centres/Villages	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Newport Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Ridgeons, Commercial Centre, Ashdon Road, Saffron Walden	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Co-op, The Heath, Hatfield Heath	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Takeley village centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
In-Centre Sub-total	**£4.6**	**£2.7**	**£0.3**	**£1.2**	**£0.1**	**£0.2**	**£0.1**
Uttrlesford District Sub-total	£5.3	£3.2	£0.3	£1.4	£0.1	£0.2	£0.2
Others in the Study Area							
Aldi, Lordscroft Lane, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Argos in Sainsbury's, Haycocks Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Cambridge Road Retail Park, Haverhill	£0.5	£0.0	£0.1	£0.0	£0.0	£0.4	£0.0
CGS Carpet Warehouse, Boundary Road, Haverhill	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
Civic Industrial Estate, Homefield Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Co-op, High Street, Sawston	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
David Holland Pharmacy, Norton Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Haverhill town centre	£2.0	£0.1	£0.0	£0.0	£0.0	£1.9	£0.0
Hollands Road Industrial Estate, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sainsbury's, Haycocks Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sturmer Nurseries, Church Walk, Sturmer, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Superstore, Cangle Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Pampisford Village Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Sawston village centre	£0.2	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0
Study Area Sub-Total	**£8.1**	**£3.3**	**£0.3**	**£1.4**	**£0.1**	**£2.8**	**£0.2**
Other Locations Outside Study Area							
Chelmsford	£5.1	£0.1	£0.1	£1.2	£0.0	£0.0	£3.6
Royston	£0.3	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0
Harlow	£2.6	£0.1	£2.0	£0.4	£0.1	£0.0	£0.0
Cambridge	£8.0	£2.5	£0.9	£0.4	£0.9	£3.3	£0.1
Bishops Stortford	£1.1	£0.0	£0.8	£0.3	£0.0	£0.0	£0.0
Braintree	£2.8	£0.1	£0.0	£1.3	£0.0	£0.1	£1.3
Bury St Edmunds	£2.0	£0.2	£0.0	£0.0	£0.0	£1.7	£0.0
Others outside the Study Area	£3.4	£0.3	£0.7	£0.4	£0.8	£0.3	£1.1
Outside Study Area Sub-total	**£25.2**	**£3.3**	**£4.4**	**£4.0**	**£2.1**	**£5.5**	**£6.0**
Total	**£33.3**	**£6.6**	**£4.8**	**£5.4**	**£2.2**	**£8.3**	**£6.2**

Notes:
a. Zones based on post code sectors
b. Market shares for shopping derived directly from NEMS Household Survey (2021)
c. Figures may not total due to rounding

Table 25: Compariosn Goods shopping patterns

Destination	Total Comparison (%)	Zone 1 Comparison (%)	Zone 2 Comparison (%)	Zone 3 Comparison (%)	Zone 4 Comparison (%)	Zone 5 Comparison (%)	Zone 6 Comparison (%)
Uttlesford District							
Saffron Walden Town Centre							
Saffron Walden town centre	8.9%	32.2%	5.7%	1.8%	3.7%	5.1%	0.7%
Waitrose, Hill Street, Saffron Walden	0.0%	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%
Saffron Walden Out of Centre							
Aldi, Knight Park, Saffron Walden	0.1%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Elizabeth Way, Saffron Walden	1.1%	5.3%	0.0%	0.2%	0.4%	0.1%	0.2%
Knight Park, Saffron Walden	0.5%	2.5%	0.0%	0.0%	0.0%	0.0%	0.3%
Shire Hill Industrial Estate, Saffron Walden	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Springwell Nursery & Garden Centre, Walden Road, Saffron Walden	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Radwinter Road, Saffron Walden	0.3%	0.9%	0.5%	0.1%	0.0%	0.0%	0.0%
Stansted Mountfitchet Town Centre							
Stansted Mountfitchet village centre	0.2%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Cambridge Road, Stansted Mountfitchet	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%
Stansted Mountfitchet Out of Centre							
Stansted Airport, Bassingbourn Road, Stansted	0.1%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
You're Furnished, Hall Road, Bamber's Green	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.1%
Great Dunmow Town Centre							
Great Dunmow town centre	1.2%	0.1%	0.6%	6.4%	0.0%	0.0%	0.3%
Great Dunmow Out of Centre							
Langthorns Plantery, High Cross Lane West, Little Canfield, Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Chapel End Nursery, Broxted, Great Dunmow	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%
Tesco, Stortford Road, Great Dunmow	0.5%	0.0%	0.3%	2.9%	0.0%	0.0%	0.1%
Travis Perkins, Chelmsford Road, Dunmow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Thaxted Town Centre							
Thaxted town centre	0.1%	0.1%	0.0%	0.5%	0.0%	0.0%	0.0%
Local Centres/Villages							
Newport Village Centre	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Ridgeons, Commercial Centre, Ashdon Road, Saffron Walden	0.0%	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%
Co-op, The Heath, Hatfield Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Takeley village centre	0.0%	0.0%	0.2%	0.1%	0.0%	0.0%	0.0%
In-Centre Sub-total	**10.5%**	**32.9%**	**8.3%**	**8.8%**	**3.9%**	**5.2%**	**1.1%**
Uttrlesford District Sub-total	13.3%	42.7%	9.1%	12.2%	4.3%	5.3%	1.8%
Others in the Study Area							
Aldi, Lordscroft Lane, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
Argos in Sainsbury's, Haycocks Road, Haverhill	0.5%	0.4%	0.0%	0.0%	0.0%	1.7%	0.0%
Cambridge Road Retail Park, Haverhill	1.4%	0.7%	0.1%	0.0%	0.9%	4.7%	0.0%
CGS Carpet Warehouse, Boundary Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
Civic Industrial Estate, Homefield Road, Haverhill	0.1%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%
Co-op, High Street, Sawston	0.00%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
David Holland Pharmacy, Norton Road, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Haverhill town centre	5.5%	1.5%	0.0%	0.0%	0.0%	19.8%	0.0%
Hollands Road Industrial Estate, Haverhill	0.1%	0.1%	0.0%	0.0%	0.0%	0.2%	0.0%
Sainsbury's, Haycocks Road, Haverhill	1.2%	0.1%	0.0%	0.0%	0.0%	4.6%	0.0%
Sturmer Nurseries, Church Walk, Sturmer, Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Superstore, Cangle Road, Haverhill	0.5%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%
Pampisford Village Centre	0.1%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Sawston village centre	0.4%	0.0%	0.0%	0.0%	0.1%	1.5%	0.0%
Study Area Sub-Total	**23.2%**	**46.2%**	**9.2%**	**12.2%**	**5.3%**	**40.1%**	**1.8%**
Other Locations Outside Study Area							
Chelmsford	17.5%	0.2%	2.0%	41.8%	0.0%	0.0%	56.0%
Royston	2.4%	0.8%	0.0%	0.0%	34.2%	0.3%	0.0%
Harlow	5.6%	3.9%	27.6%	6.0%	1.1%	0.0%	0.0%
Cambridge	26.4%	39.1%	16.6%	8.0%	42.3%	45.6%	3.8%
Bishops Stortford	6.3%	2.9%	31.3%	7.5%	0.2%	0.5%	0.5%
Braintree	9.1%	2.4%	3.1%	18.5%	0.5%	1.2%	26.2%
Bury St Edmunds	2.4%	0.6%	0.0%	0.0%	0.1%	8.8%	0.0%
Others outside the Study Area	7.2%	3.9%	10.1%	5.9%	16.3%	3.4%	11.7%
Outside Study Area Sub-total	**76.8%**	**53.8%**	**90.8%**	**87.8%**	**94.7%**	**59.9%**	**98.2%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:
a. Zones based on post code sectors
b. Market shares for shopping derived directly from NEMS Household Survey (2021)
c. Figures may not total due to rounding

Table 26: Comparison Goods shopping expenditure

Destination	Total Comparison (£m)	Zone 1 Comparison (£m)	Zone 2 Comparison (£m)	Zone 3 Comparison (£m)	Zone 4 Comparison (£m)	Zone 5 Comparison (£m)	Zone 6 Comparison (£m)	Inflow Beyond Study Area (£m)	Total Comparison (incl. Inflow) (£m)
Uttlesford District									
Saffron Walden Town Centre									
Saffron Walden town centre	£57.4	£39.2	£5.1	£1.8	£1.5	£8.8	£0.9	£2.9	£60.2
Waitrose, Hill Street, Saffron Walden	£0.2	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.2
Saffron Walden Out of Centre									
Aldi, Knight Park, Saffron Walden	£0.5	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Homebase, Elizabeth Way, Saffron Walden	£7.1	£6.4	£0.0	£0.2	£0.1	£0.1	£0.2	£0.0	£7.1
Knight Park, Saffron Walden	£3.5	£3.0	£0.0	£0.0	£0.0	£0.1	£0.4	£0.0	£3.5
Shire Hill Industrial Estate, Saffron Walden	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
Springwell Nursery & Garden Centre, Walden Road, Saffron Walden	£0.2	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.2
Tesco, Radwinter Road, Saffron Walden	£1.6	£1.1	£0.4	£0.1	£0.0	£0.0	£0.0	£0.0	£1.6
Stansted Mountfitchet Town Centre									
Stansted Mountfitchet village centre	£1.5	£0.1	£1.4	£0.0	£0.0	£0.0	£0.0	£0.1	£1.6
Tesco Express, Cambridge Road, Stansted Mountfitchet	£0.2	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Stansted Mountfitchet Out of Centre									
Stansted Airport, Bassingbourn Road, Stansted	£0.5	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
You're Furnished, Hall Road, Bamber's Green	£0.2	£0.0	£0.0	£0.2	£0.0	£0.0	£0.1	£0.0	£0.2
Great Dunmow Town Centre									
Great Dunmow town centre	£7.7	£0.2	£0.5	£6.6	£0.0	£0.0	£0.4	£0.0	£7.7
Great Dunmow Out of Centre									
Langthorns Plantery, High Cross Lane West, Little Canfield, Dunmow	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
Chapel End Nursery, Broxted, Great Dunmow	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1
Tesco, Stortford Road, Great Dunmow	£3.4	£0.0	£0.3	£3.0	£0.0	£0.0	£0.1	£0.0	£3.4
Travis Perkins, Chelmsford Road, Dunmow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Thaxted Town Centre									
Thaxted town centre	£0.6	£0.2	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.6
Local Centres/Villages									
Newport Village Centre	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Ridgeons, Commercial Centre, Ashdon Road, Saffron Walden	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Co-op, The Heath, Hatfield Heath	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Takeley village centre	£0.3	£0.0	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.3
In-Centre Sub-total	**£68.3**	**£40.0**	**£7.4**	**£9.0**	**£1.6**	**£8.9**	**£1.3**	**£2.9**	**£71.2**
Uttrlesford District Sub-total	£85.8	£52.0	£8.2	£12.6	£1.7	£9.2	£2.2	£2.9	£88.8
Others in the Study Area									
Aldi, Lordscroft Lane, Haverhill	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0		
Argos in Sainsbury's, Haycocks Road, Haverhill	£3.3	£0.4	£0.0	£0.0	£0.0	£2.9	£0.0		
Cambridge Road Retail Park, Haverhill	£9.3	£0.8	£0.1	£0.0	£0.4	£8.1	£0.0		
CGS Carpet Warehouse, Boundary Road, Haverhill	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0		
Civic Industrial Estate, Homefield Road, Haverhill	£0.5	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0		
Co-op, High Street, Sawston	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0		
David Holland Pharmacy, Norton Road, Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0		
Haverhill town centre	£35.9	£1.8	£0.0	£0.0	£0.0	£34.0	£0.0		
Hollands Road Industrial Estate, Haverhill	£0.3	£0.1	£0.0	£0.0	£0.0	£0.3	£0.0		
Sainsbury’s, Haycocks Road, Haverhill	£8.0	£0.2	£0.0	£0.0	£0.0	£7.8	£0.0		
Sturmer Nurseries, Church Walk, Sturmer, Haverhill	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0		
Tesco Superstore, Cangle Road, Haverhill	£3.2	£0.0	£0.0	£0.0	£0.0	£3.2	£0.0		
Pampisford Village Centre	£0.8	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0		
Sawston village centre	£2.7	£0.1	£0.0	£0.0	£0.0	£2.6	£0.0		
Study Area Sub-Total	**£150.3**	**£56.2**	**£8.3**	**£12.6**	**£2.1**	**£69.0**	**£2.2**	**£2.9**	**£88.8**
Other Locations Outside Study Area									
Chelmsford	£113.1	£0.2	£1.8	£43.0	£0.0	£0.0	£68.0		
Royston	£15.3	£1.0	£0.0	£0.0	£13.7	£0.6	£0.0		
Harlow	£36.1	£4.7	£24.8	£6.1	£0.4	£0.0	£0.0		
Cambridge	£170.7	£47.5	£14.9	£8.3	£16.9	£78.5	£4.6		
Bishops Stortford	£40.9	£3.5	£28.1	£7.7	£0.1	£0.9	£0.6		
Braintree	£58.9	£2.9	£2.8	£19.0	£0.2	£2.1	£31.8		
Bury St Edmunds	£15.8	£0.7	£0.0	£0.0	£0.0	£15.1	£0.0		
Others outside the Study Area	£46.5	£4.8	£9.0	£6.1	£6.5	£5.8	£14.3		
Outside Study Area Sub-total	**£497.3**	**£65.4**	**£81.5**	**£90.3**	**£37.9**	**£102.9**	**£119.2**	**£0.0**	**£0.0**
Total	**£647.6**	**£121.6**	**£89.7**	**£102.9**	**£40.0**	**£171.9**	**£121.4**	**£2.9**	**£88.8**

Notes:

a. Zones based on post code sectors

b. Market shares for shopping derived directly from NEMS Household Survey (2021)

c. Figures may not total due to rounding

Uttlesford Retail Capacity Study
Nexus Planning

Table 27a: Estimated 'capacity' for new comparison goods facilities in Uttlesford

Year	Total Survey Turnover (£m)[1]	Borough Turnover (£m)[2]	Inflow (£m)	Surplus Expenditure (£m)
2021	88.8	85.8	2.9	0.0
2025	101.4	97.2	3.4	-0.9
2030	116.2	112.0	3.8	-0.3
2035	132.1	130.5	4.4	2.8
2040	150.5	152.9	5.0	7.4
Study Area Market Share (%)		**13.3**		

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 18 (Oct 2020)
2. Assumes constant market share claimed by Uttlesford facilities at 13.3% from Study Area
2019 Prices

Table 27b: Gross quantitative capacity for additional comparison goods floorspace in Uttlesford

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq m net) Min[1]	Max[2]
2025	-0.9	-100	-200
2030	-0.3	0	-100
2035	2.8	300	400
2040	7.4	700	1,000

a. Average sales density assumed to be £7,000 per sq m, which Nexus Planning considers to be towards the higher end of what would be achieved in Uttlesford District
b. Average sales density assumed to be £5,000 per sq m, which Nexus Planning considers to be towards the lower end of what would be achieved in Uttlesford District
c. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 18 (October 2020)
2019 Prices

Table 27c: Extant comparison goods commitments in Uttlesford

Destination	Reference	Proposal	Net Comparison Floorspace (sq m)	Estimated Sales Density (£/sq m)	Estimated Comparison Turnover (£m)
The Hangar, Freemans Farm, Wimbish	UTT/20/1667/FUL	Change of use to A1 retail	260	6,000	1.6
Total					**1.6**

Notes:
a. Comparison floorspace is assumed to be 2/3 net sales area based on Nexus Planning judgement where the occupier has not been referenced within the application
b. Assessed commitments limited to development proposals greater then 200 sq m
2019 Prices

Table 27d: Net quantitative capacity for additional comparison goods floorspace in Uttlesford

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net) Min[1]	Max[2]
2025	-0.9	1.6	-2.4	-300	-500
2030	-0.3	1.8	-2.1	-300	-400
2035	2.8	2.0	0.8	100	100
2040	7.4	2.3	5.1	500	800

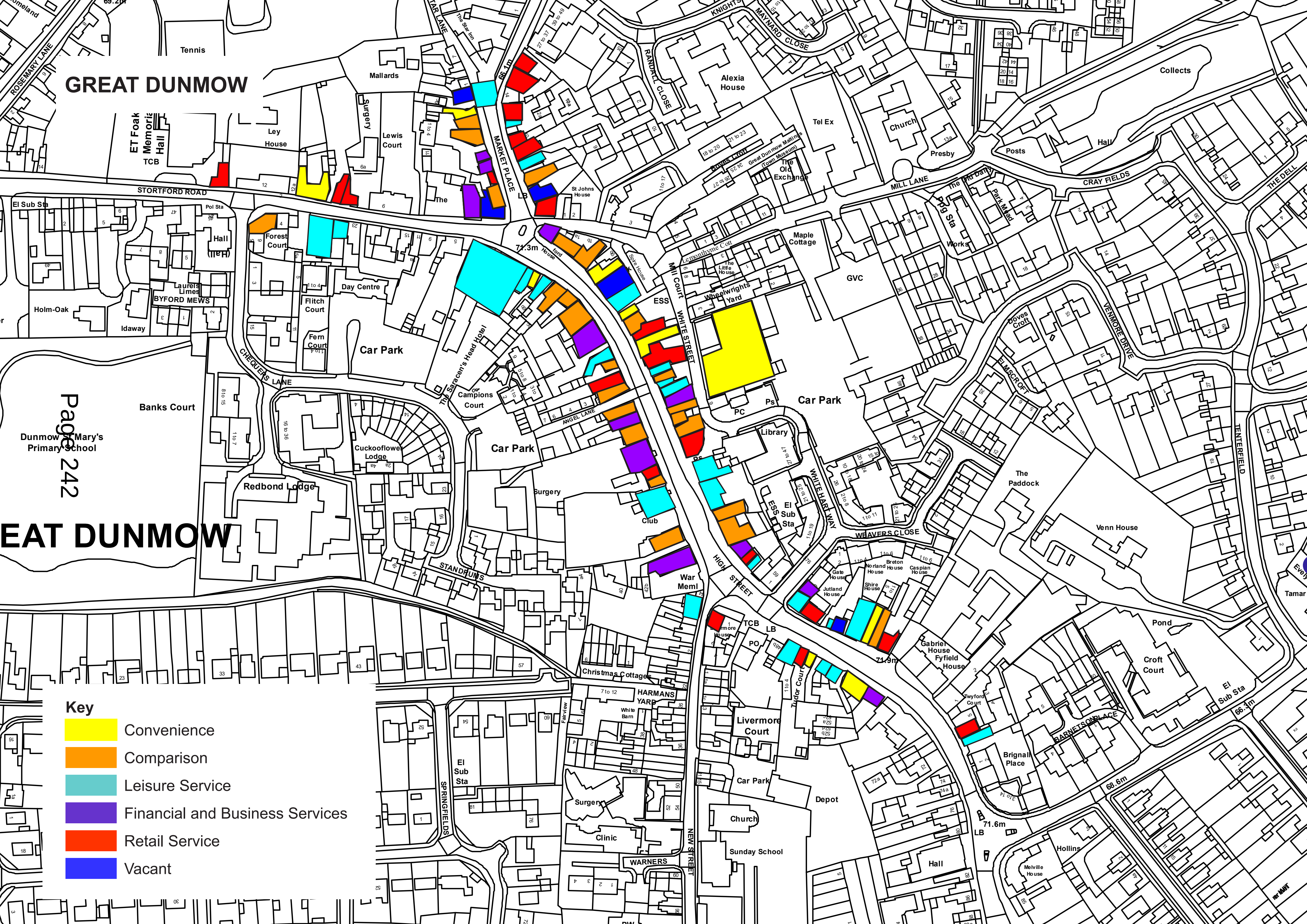
Notes:
a. Average sales density assumed to be £7,000 per sq m, which Nexus Planning considers to be towards the higher end of what would be achieved in Uttlesford District
b. Average sales density assumed to be £5,000 per sq m, which Nexus Planning considers to be towards the lower end of what would be achieved in Uttlesford District
c. Residual calculated by subtracting turnover of commitments (sourced from Table 27c) from surplus expenditure (sourced from Table 27a)
d. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 18 (October 2020)
2019 Prices

Appendix D: Town Centre Composition Plans

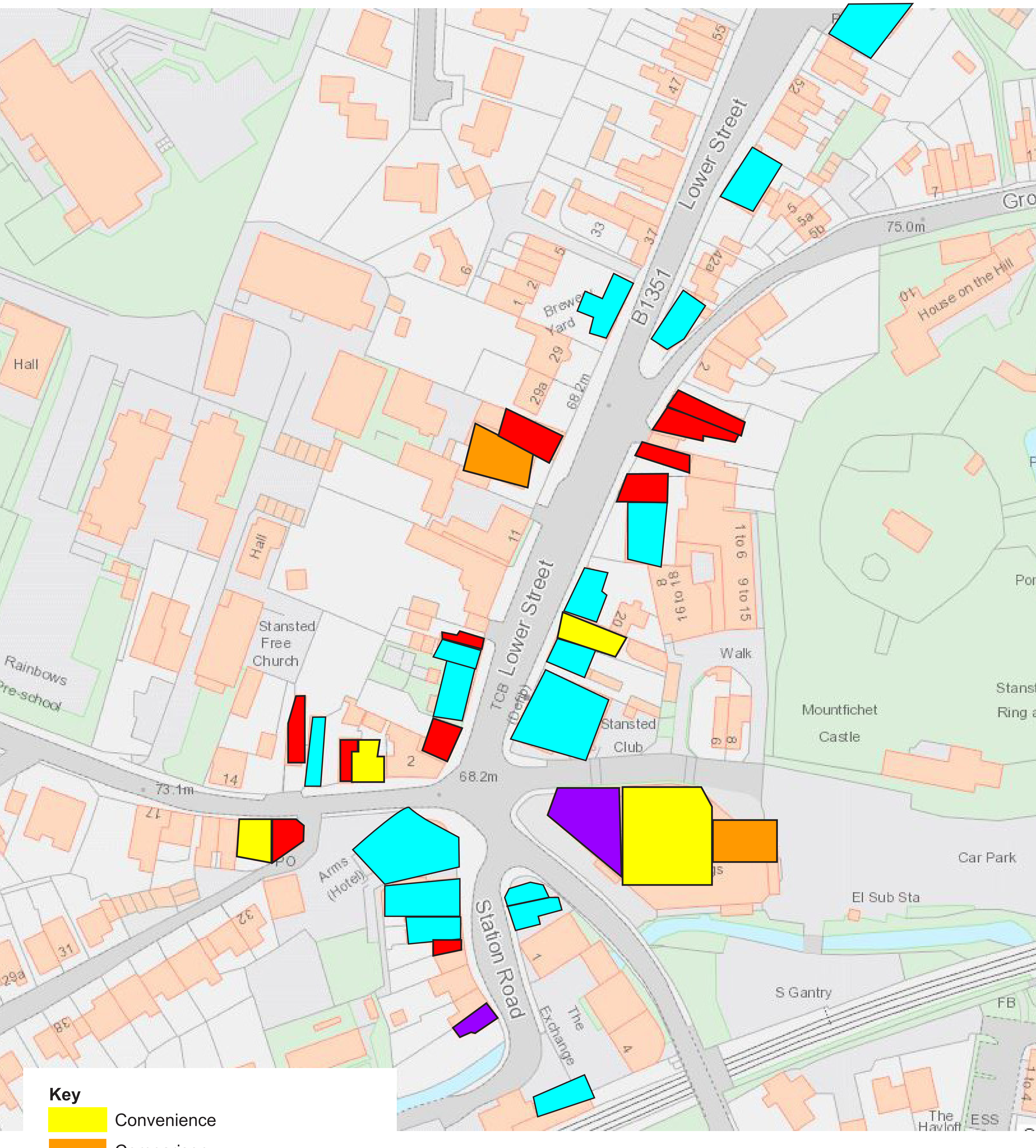
SAFFRON WALDEN

Key

- Convenience
- Comparison
- Leisure Service
- Financial and Business Services
- Retail Service
- Vacant


GREAT DUNMOW
Key
Convenience
Comparison
Leisure Service
Financial and Business Services
Retail Service
Vacant

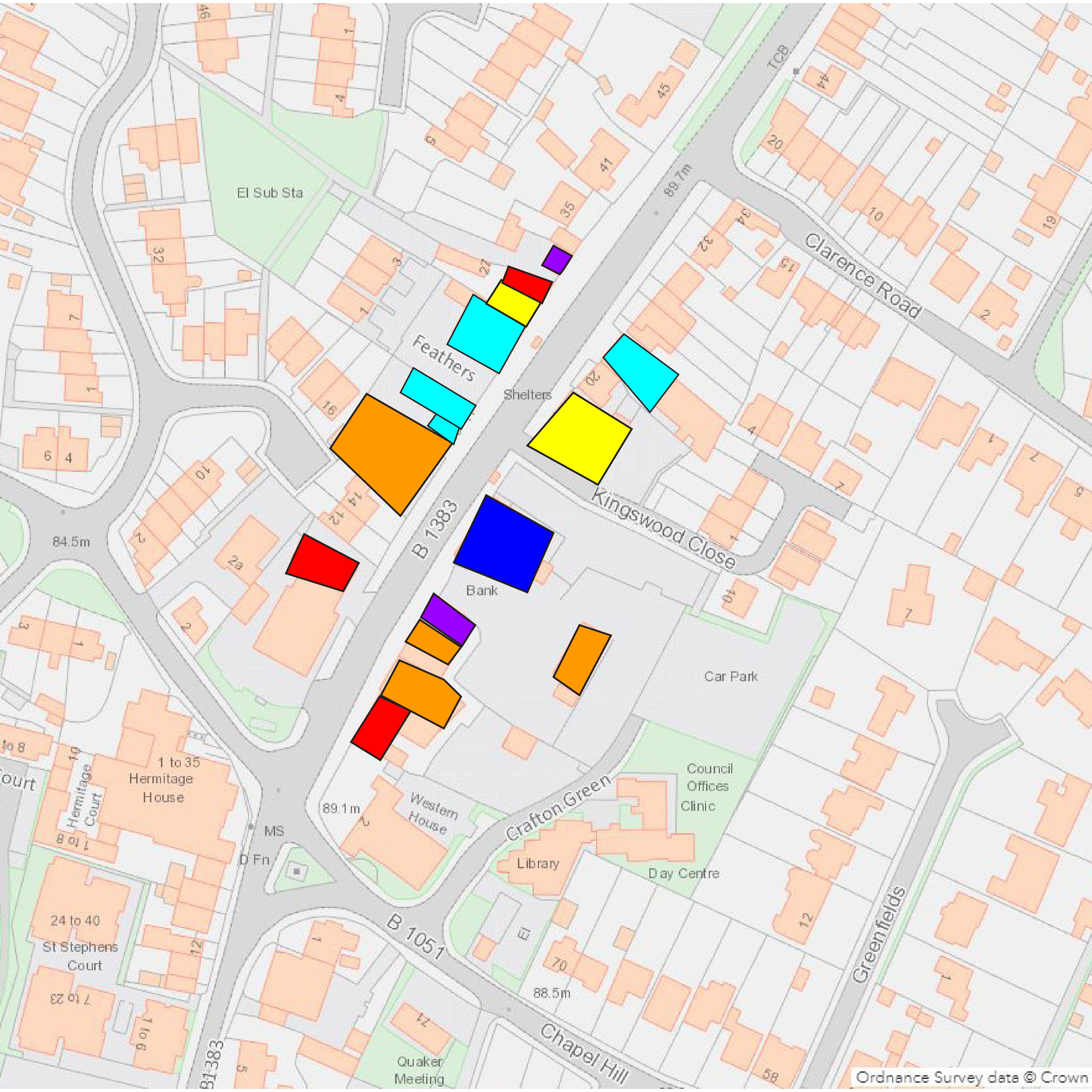
STANSTED MOUNTFITCHET (LOWER STREET)



Key

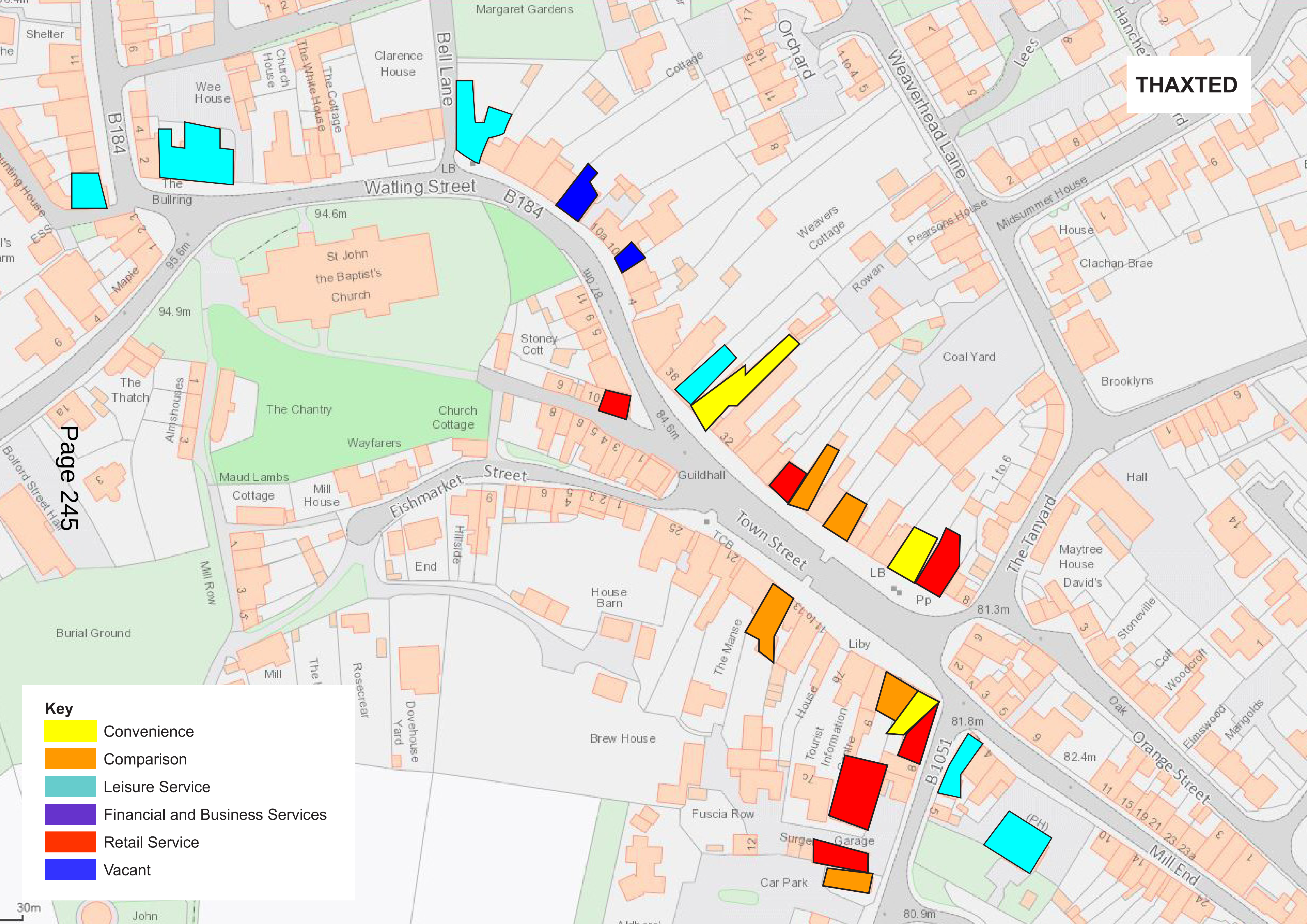
- Convenience
- Comparison
- Leisure Service
- Financial and Business Services
- Retail Service
- Vacant

STANSTED MOUNTFITCHET (CAMBRIDGE ROAD)



Key

- Convenience
- Comparison
- Leisure Service
- Financial and Business Services
- Retail Service
- Vacant


THAXTED
Key
Convenience
Comparison
Leisure Service
Financial and Business Services
Retail Service
Vacant
Watling Street
B184
Bell Lane
Margaret Gardens
Clarence House
Wee House
The Bullring
Church House
The White House
The Cottage
Shelter
St John the Baptist's Church
94.6m
94.9m
95.6m
Stoney Cott
The Chantry
Church Cottage
Wayfarers
Maud Lambs Cottage
Mill House
Fishmarket Street
The Thatch
Almshouses
Bolford Street Hall
Mill Row
Burial Ground
Guildhall
Town Street
84.6m
Orchard
Weaverhead Lane
Weavers Cottage
Pearsons House
Midsummer House
Rowan
Lees
Coal Yard
Clachan Brae
Brooklyns
Hall
The Tanyard
Maytree House
David's
Stoneville
Woodcroft
Elmswood
Marigolds
Orange Street
Mill End
81.3m
81.8m
82.4m
80.9m
B1051
Liby
The Manse
House Barn
Brew House
Tourist Information Centre
Fuscia Row
Garage
Car Park
Hillside
End
Dovehouse Yard
Rosecroft
(PH)
30m

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Agenda Item 5

Committee:	Local Plan Leadership Group	**Date:**
Title:	Infrastructure Delivery Plan - Baseline Report	Wednesday, 9 February 2022
Report Author:	Stephen Miles, Local Plans and New Communities Manager smiles@uttlesford.gov.uk	

Summary

1. An infrastructure baseline report to inform the emerging Local Plan.

Recommendations

2. To note the findings of the work and to utilise it in the development of the emerging Local Plan.

Financial Implications

3. This work is within the 2021/22 budget.

Background Papers

4. N/a

Impact

5.

Communication/Consultation	The timetable builds in three stages for people to make representations on the draft Local Plan.
Community Safety	N/a
Equalities	Forthcoming policies will be subject to an Equalities and Healthy Impact Assessment (EqHIA).
Health and Safety	N/a
Human Rights/Legal Implications	Preparation of a local plan is a statutory duty. It needs to meet legal tests and comply with regulations.
Sustainability	Forthcoming policies will need to meet the sustainability objectives of the Council and the Local Plan will be subject to a

	Sustainability Appraisal.
Ward-specific impacts	All
Workforce/Workplace	N/a

Situation

6. One of the key documents in the preparation of the Local Plan is the Infrastructure Delivery Plan (IDP). This will set out the range and scope of infrastructure required to support the growth in the District to 2040, informed by the context of achieving net zero in the district by 2030, tackle the health and ecological crises and address the levelling up agenda. Without an agreed plan to demonstrate how the essential infrastructure can be delivered in a timely and viable way the new housing and employment growth risks being found unsound at examination. This key document will accompany the pre-submission draft of the Local Plan in Spring next year.
7. Uttlesford District Council commissioned LUC and Navigus Planning consultants to prepare the IDP. They have produced a baseline report which sets out the infrastructure planning context, which is relevant for the consideration of the spatial strategy options. It is based on national planning policy and consultation with key infrastructure providers including the County Council, health, utility providers and emergency services. The IDP will set out the principal considerations for the capacity, funding and delivery of infrastructure improvements across the District that will be required to respond to growth pressures and the climate, health and ecological emergencies over the plan period and beyond. Where deficiencies are identified, the Local Plan's policies will set out how they and any other national or strategic infrastructure requirements will be addressed. To ensure deliverability, the infrastructure requirements identifies within the IDP, along with the local plan policies, will be taken into account in the viability assessment of the Local Plan.
8. The National Planning Policy Framework (NPPF 2021)[1] states that plans should promote a sustainable pattern of development, emphasising that they must "align growth and infrastructure" along with improving the environment and helping to mitigate climate change. Local Plans should include strategic policies which make sufficient provision for the range of infrastructure required.
9. The principal findings of the IDP Baseline Report are summarised below. It should be noted that the document will be updated as more information comes available or as infrastructure providers develop their own plans that impact on the District. The main topics covered to date are:
    - Transport including road, rail, walking and cycling
    - Education including early years and childcare, schools (primary and secondary, further and higher education

[1] https://www.gov.uk/government/publications/national-planning-policy-framework--2

- Green infrastructure, open space and sports including all areas of green infrastructure such as nature reserves, open spaces as well as indoor and outdoor sports provision
- Health and social wellbeing including healthcare such as GPs, hospitals, adult social care and health centres
- Utilities including - electricity, gas, water supply and treatment as well as telecommunications including broadband
- Waste management including collection and disposal
- Flooding and drainage including any need for flood defence and surface water drainage infrastructure
- Community including cultural and community infrastructure e.g. village halls, libraries and performance spaces
- Emergency Services including Ambulance, Fire and Police.

10. The main issues highlighted are:

    i. The rural nature of the district leads to a dispersed settlement pattern with the consequent need to travel to access services and employment; due to a lack of suitable alternatives for many, this results in the significant number of journeys being undertaken by private car. To address the impact of carbon emissions arising from this need to travel, the local plan will need to aim to reduce this through alignment of growth, infrastructure, employment opportunities, and improved internet, as well as a review of bus services and the safe cycling network;

    ii. Growth will be influenced by strategic policies in adjoining counties and district including London Stansted Cambridge Innovation corridor; Ox-Cam Arc Spatial Plan; the A120 Haven Gateway growth corridor; South West Herts Strategic Plan; Greater Cambridge growth plans; major developments planned around Harlow and north of Bishop's Stortford;

    iii. Strategic infrastructure proposals such as: Cambridge South station; A10 improvements; Anglian Water's South Lincolnshire Reservoir and new pipeline that will also serve Uttlesford; A120 improvements around Braintree; enhancements required to the Water Recycling Centre (WRC) at Great Leighs; new unction 7a n the M11 and consideration of upgrades to J8; potential East Herts Rapid Transport System from Hemel Hempstead and potentially to Stansted Airport; growth in passenger capacity at the airport; West Anglia Mainline plan to increase service frequency and capacity;

    iv. There is significant pressure on primary school places due to both new development and demographic pressures, where increasing numbers of births in recent years increases the need for pupil places. New schools are already being planned at Saffron Walden (developer contributions have secured the site for this) and Great Dunmow (a new two-form entry school will be required). Primary school expansion will also be required at Elsenham and Helena Romanes (Great Dunmow). Expansion at Bishop's Stortford may increase demand at Forest Hall School;

v. Pressure in Hatfield Forest as the main provision of strategic open space compounded by growing impact on protected nature areas arising from increasing visitor pressure; relatively low public access to other open spaces, parks, and gardens because of the predominance of private ownership. The requirements for biodiversity net gain at 10% following the enactment of the Environment Bill may lead to an increased provision of (multifunctional) green infrastructure within development sites;

vi. GP practices are at capacity. Health and social care services are due to be reformed from this year under the new Integrated Care Systems (ICSs); emerging technologies to enable people to access healthcare via the internet could help free up capacity over the plan period;

vii. The over-abstraction of ground and surface water result in negative effects on chalk streams in the district and surrounding area, and the water company plans to transport water from elsewhere; these issues are addressed in the current Water Cycle Study which is nearing completion;

viii. Pressure on the electricity grid and sub-stations arising from increased use of electricity which will grow as the grid capacity and storage needs to accommodate the reduction in use of gas in new building from 2025, growth in electric vehicles and anticipated more people working from home

11. Although the IDP baseline sets out the current position for infrastructure, highlighting particular issues as above, as the spatial options are developed and the preferred locations of principal growth and expansion areas determined, more detailed infrastructure analysis will be undertaken. This will include assessments of the timing of the need for enhanced provision in different locations across the district, the availability of funding, and the impact on viability and deliverability as a whole. These issues are currently being explored and will be addressed as the preferred spatial option is developed over the next few months.

Risk Analysis

12.

Risk	Likelihood	Impact	Mitigating actions
If the Council does not have an NPPF compliant evidence base the plan could be found unsound	2	4 – delays in adopting the Local Plan	Professional evidence developed in line with the NPPF and PPG

1 = Little or no risk or impact
2 = Some risk or impact – action may be necessary.
3 = Significant risk or impact – action required
4 = Near certainty of risk occurring, catastrophic effect or failure of project.

LUC

Uttlesford District Council

Infrastructure Delivery Plan
Baseline Review of Infrastructure Context

Final report
Prepared by LUC
December 2021

Uttlesford District Council

Infrastructure Delivery Plan

Baseline Review of Infrastructure Context

Project Number
11539

Version	Status	Prepared	Checked	Approved	Date
1.	Draft for client review	S Langer S Newman H Briggs	S Langer	P Smith	03.10.2021
2.	Final Report	S Langer S Newman H Briggs	S Langer	P Smith	08.11.2021
3.	Minor amendments to Final Report	S Langer	S Langer	P Smith	01.12.2021

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ISO 14001:2015 Environmental Management EMS566057
OHSAS 18001 Occupational Health and Safety Management OHS627041

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Contents

Chapter 1
Introduction

This chapter sets out the purpose and structure of this report and summarises national policy for infrastructure planning.

Purpose of this report

1.1 Uttlesford District Council has commissioned LUC and Navigus Planning to prepare an Infrastructure Delivery Plan (IDP) which will support the council's emerging Local Plan. The Local Plan is at an early stage, with the quantum growth and the spatial strategy yet to be defined.

1.2 This document provides the baseline context for infrastructure in Uttlesford District Council, based on literature review and initial consultation with infrastructure providers at workshops.

Structure of this report

1.3 **Chapter one** (this chapter) sets out the scope of the IDP, how it relates to national planning policy and guidance and the way in which it supports the local plan process.

1.4 **Chapter two** sets out the development context of Uttlesford, including a review of planned development and strategic infrastructure proposals in the surrounding areas.

1.5 **Chapter three** sets out the infrastructure baseline on a topic-by-topic basis. This includes a review of the current context, key delivery organisations, funding and critical issues and implications emerging from the climate change and ecological crises, responding to growth pressures and the Covid-19 Pandemic.

1.6 **Appendix A** includes a settlement-based facilities assessment undertaken by Uttlesford District Council.

National policy and guidance

National policy

1.7 The National Planning Policy Framework (NPPF)[1] sets out that the purpose of the planning system is to contribute to the achievement of sustainable development. It goes on to describe what this means in terms of plan making, setting out that all plans should "*promote a sustainable pattern of development that seeks to: meet the development needs of their area;* ***align growth and infrastructure****; improve the environment; mitigate climate change (including by making effective use of land in urban areas) and adapt to its effects*" (our emphasis in bold text).

1.8 Further to this, the NPPF states at paragraph 20 that local planning authorities should include strategic policies which make sufficient provision for:

"*b)* ***infrastructure*** *for* ***transport, telecommunications, security, waste management, water supply, wastewater, flood risk and coastal change management****, and the provision of minerals and energy (including heat);*

c) ***community facilities (such as health, education and cultural infrastructure)****.*

d) conservation and enhancement of the natural, built and historic environment, including landscapes ***and green infrastructure****, and* ***planning measures to address climate change mitigation and adaptation****.*" (our emphasis in bold text).

National Guidance

1.9 Further advice is contained in the National Planning Practice Guidance (NPPG):

"At an early stage in the plan-making process strategic policy-making authorities will need to work alongside infrastructure providers, service delivery organisations, other strategic bodies such as Local Enterprise Partnerships, developers, landowners and site promoters. A collaborative approach is expected to be taken to identifying infrastructure deficits and requirements, and opportunities for addressing them. In doing so they will need to:

- assess the quality and capacity of infrastructure, and its ability to meet forecast demands. Where deficiencies are identified, policies should set out how those deficiencies will be addressed; and
- take account of the need for strategic infrastructure, including nationally significant infrastructure, within their areas"[2].

1.10 This IDP brings together the key infrastructure baseline in relation to all of the relevant matters as set out in the paragraphs of the NPPF and NPPG quoted above. As the Uttlesford Local Plan develops and spatial options are considered and eventually determined, this IDP will be further developed to consider the infrastructure needs of proposed growth, how these will be delivered and by when.

Scope of this assessment

1.11 The assessment covers the following types of infrastructure:

Transport and the Public Realm

Including road, rail, walking and cycling

Education

Including early years and childcare, schools (primary and secondary, further and higher education

Green infrastructure, open space and sports

Including all areas of green infrastructure such as nature reserves, open spaces as well as sports indoor and outdoor provision

[1] Ministry of Housing, Communities and Local Government (2021) National Planning Policy Framework [online]. Available at: https://www.gov.uk/government/publications/national-planning-policy-framework--2

[2] Ministry of Housing, Communities and Local Government (2019) National Planning Practice Guidance Paragraph: 059 Reference ID: 61-059-20190315 [online]. Available at: https://www.gov.uk/guidance/plan-making

Health and social wellbeing

Including healthcare such as GPs, hospitals, adult social care and other health centres

Utilities

Electricity, Gas, Water supply and treatment as well as telecommunications including broadband

Waste management

Including collection and disposal

Flooding and Drainage

Including flood defence and surface water drainage infrastructure

Community

Including cultural and community infrastructure, including community and youth centres and libraries

Emergency Services

Including Ambulance, Fire and Police

Methodology

1.12 This IDP document has been produced following a literature review and two workshops with stakeholders, which took place on 23 June and 1 July 2021.

Supporting the emerging Uttlesford local plan

1.13 This document supports the emerging local plan by setting out the current baseline and the critical issues and implications which are likely to emerge over the plan period (to 2040) and beyond.

1.14 It is important to note that this document has been prepared at an early stage of the local plan development, and there are numerous topic specific evidence bases which have been commissioned (but not completed) which will inform future iterations of this report. As such, future iterations of the IDP will take account of these evidence bases, allowing a more detailed analysis and explanation of infrastructure issues and proposals.

1.15 As the spatial distribution of development emerges, specifically the sites which are likely to come forward and their scale, future iterations of the infrastructure delivery plan will set out the infrastructure requirements, how these will be funded, delivered and by what timescale.

Chapter 2

The Uttlesford IDP Context

This chapter outlines the context, including anticipated growth, a review of the emerging development strategy and a strategic overview of growth proposed in the surrounding areas, including key cross-border infrastructure projects.

2.1 Uttlesford is a rural district with a dispersed settlement pattern. Saffron Walden is the largest settlement in the district, with a population of approximately 17,000. The next most populated settlements are Great Dunmow (10,000 residents) Stansted Mountfitchet (6,500 residents) and Takeley (5,000 residents). Stansted Airport in the southwest of the district and is of local, regional and international significance. Takeley makes best use of these due to its close proximity.

2.2 Uttlesford District Council Officers have undertaken a facilities assessment which sets out the number of facilities available in each settlement. This is included at Appendix A.

2.3 The dispersed nature of the existing population and development in Uttlesford influences infrastructure provision and how people access facilities. Many settlements do not have the critical mass to sustain a large number of facilities and this is evidenced from the facilities assessment included at Appendix A. The implications of this are that people must travel outside the settlements where they live to access services, facilities and also employment opportunities. Due to the rural and dispersed nature of Uttlesford and the current infrastructure provision, the quickest and most convenient way to do this is by private car.

2.4 In order to help address the zero carbon and health emergencies, it is recommended that the focus must be shifted away from the private car to more active and sustainable modes of travel. Reducing the need to travel through alignment of growth and infrastructure and employment opportunities, and provision of higher internet speeds is strongly recommended. For the journeys that must be made, switching to more sustainable modes will be key. Within the larger settlements and those along the A120, public transport has the greatest potential to deliver this shift. In the smaller settlements, cycling, particularly with the use of e-bikes, is likely to offer the greatest potential to achieve the switch to more sustainable modes.

2.5 It is therefore considered that focussing growth to settlements with existing facilities and services, plus a significant shift towards funding internet connectivity, new public transport and long-range cycle routes which are mostly traffic free will be required to deliver the zero-carbon agenda.

Growth within Uttlesford

2.6 Current commitments (sites which have at least attained outline planning permission) provide for a total of 3,284 dwellings between 2020/21 and 2032/33[3]. As these have permission, infrastructure contributions have already been agreed in relevant legal agreements and as such further contributions cannot be taken. A further 700 dwellings are anticipated to come forward as windfall over this time (70 dwellings per year), although this is anticipated to be increased to 2,280 (114 dwellings per year)[4]. The location of these is uncertain as, by its nature, windfall development is not strategically planned for and happens spontaneously within an area. The majority of this is likely to be smaller schemes rather than strategic provision. Infrastructure needs and development contributions will therefore be calculated on a case by case basis through the development management process.

2.7 The new local plan will review and update the total amount of growth required within the district. A paper setting out the draft housing requirement for the district was taken to Uttlesford District Council's Local Plan Leadership Group on 24 June 2021[5]. This sets out that in accordance with the Governments Standard Methodology on housing requirement calculation[6], a minimum housing need of 706 dwellings per annum would be required in Uttlesford. It is important to note that this figure may change as a result of new evidence and information. An increase to this figure by 15-20% is recommended by officers to provide a buffer so that the plan is able to flexibly react to changing circumstances. The Council's latest five-year supply statement demonstrates that as of April 2020 there was a supply of 4,020 homes expected to be delivered post 2020. This means that the Council is likely to be required to identify around a further 12,900 homes to meet the potential housing requirement. It will be vital that growth in the emerging local plan is accompanied by infrastructure that not only underpins a high quality of life and wellbeing, but that plays a central role in meaningfully tackling 21st century challenges.

The emerging development strategy

2.8 A paper setting out the preliminary outline spatial strategy (POST) was taken to the Local Plan Leadership Group on 29 July 2021[7]. The POST is largely informed by the current context of Uttlesford and recognises that in order to make sure that new development in Uttlesford can be best served by infrastructure, it should be focussed around the existing infrastructure networks – making use of what is there already.

2.9 The POST sets out that the spatial strategy should support sustainable development (including economic growth) concentrated on existing town centres, larger villages and in the vicinity of Stansted Airport and Chesterford Research Park. It sets out that new communities may need to form an element of the growth strategy and that if provided they should also seek opportunities to maximise links to existing infrastructure (including sustainable transport infrastructure). These opportunities are best realised in proximity to transport hubs and networks that would best be able to handle large numbers of trips – including the most well-used stations on the West Anglia Line railway, Stansted Airport, M11, A120, and to a lesser extent the B1383 and B1256.

2.10 This distribution of growth, specifically in relation to the sites which will come forward will be considered in future iterations of the IDP once more information is available in relation to sites.

Strategic overview of growth in the surrounding areas and key cross border infrastructure projects

Surrounding context

2.11 Infrastructure capacity and requirements within Uttlesford will be affected by housing and economic growth in surrounding areas. Strategically, this includes:

[3] Based on Uttlesford District Council Monitoring dated April 2020
[4] Based on discussions with Uttlesford District Council Officers and https://uttlesford.moderngov.co.uk/documents/g5809/Public%20reports%20pack%2024th-Jun-2021%2019.00%20Local%20Plan%20Leadership%20Group.pdf?T=10
[5] https://uttlesford.moderngov.co.uk/documents/g5809/Public%20reports%20pack%2024th-Jun-2021%2019.00%20Local%20Plan%20Leadership%20Group.pdf?T=10
[6] https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments
[7] https://uttlesford.moderngov.co.uk/documents/s24603/Local%20Plan%20Preliminary%20Outline%20Strategy.pdf

- the influence and reach of the London City Region, especially along the London Stansted Cambridge Innovation corridor;
- the Ox-Cam Spatial Plan, currently in preparation. This will set out growth requirements and strategic infrastructure provision for this area (to the north of Uttlesford), including the proposed East-West rail link; A strategic plan is also being drawn up between South Cambridgeshire and Cambridge City, reflecting the interrelationship between these districts. Significant growth is likely to come forward south of Cambridge, close to the Uttlesford boundary;
- the A120 Haven Gateway growth corridor and within this the preparation of a strategic 'section one' plan for the North Essex Authorities, setting out significant growth ambitions;
- the South West Herts Strategic Plan – a joint spatial plan covering Dacorum District, St Albans City and District, Three Rivers District and Watford Borough. This plan is at a very early stage but given it covers such a significant area, will include a number of strategically significant developments. This will be informed by the Hertfordshire infrastructure planning partnership – a partnership of planning/transport portfolio holders and heads of planning from the eleven councils in Hertfordshire as well as representation from Herts Local Enterprise Partnership.
- major developments planned in the Gilston area north of Harlow and major developments planned north of Bishop's Stortford.

Growth in neighbouring councils

2.12 The neighbouring district councils are at different stages of local plan preparation, with some councils having local plans which are more recently adopted than others. A summary of the neighbouring District Councils' local plans is provided in **Table 2.1**.

Table 2.1: Summary of growth requirements in surrounding districts

Local authority / Relevant plan	Extant housing requirement	Emerging housing requirement (if there is an emerging plan)	Extant employment requirement	Emerging employment requirement (if there is an emerging plan)
Braintree – North Essex Section 1 Local plan (2021). Plan period: 2013-2033.	14,320		Between 20.9 and 43.3 Hectares (Ha) of employment land	
South Cambridgeshire - The South Cambridgeshire Local Plan[8] (2018). Plan period: 2011-2031.	19,500		22,000 jobs	
Cambridge - The Cambridge Local Plan[9] (2018). Plan period: 2011-2031.	35,773		22,100 jobs	
Emerging Greater Cambridge Shared Plan (South Cambridgeshire and Cambridge Joint Spatial Plan)[10]. Plan period: to 2040		44,400		58,500 jobs
East Hertfordshire - East Hertfordshire Local Plan[11] (2018). Plan period: 2011-2033.	18,458		10,800 jobs	
Epping Forest – Epping Forest Local Plan 1998[12] as amended by Local Plan Alterations (2006). Plan period: 1996-2011. Likely to be replaced by Epping Forest District Local Plan Submission Version (2017)[13].	2,400	11,400		10,800 jobs

[8] https://www.scambs.gov.uk/planning/local-plan-and-neighbourhood-planning/the-adopted-development-plan/south-cambridgeshire-local-plan-2018/

[9] https://www.cambridge.gov.uk/local-plan-2018

[10] https://consultations.greatercambridgeplanning.org/greater-cambridge-local-plan-first-proposals

[11] https://www.eastherts.gov.uk/planning-building/planning-policy/east-herts-district-plan-2018

[12] https://www.efdclocalplan.org/wp-content/uploads/2017/12/Combined-Policies-of-Epping-Forest-District-Local-Plan-1998-and-Alternations-2006-published-2008.pdf

[13] https://www.efdclocalplan.org/local-plan/consultation-on-main-modifications/

Local authority / Relevant plan	Extant housing requirement	Emerging housing requirement (if there is an emerging plan)	Extant employment requirement	Emerging employment requirement (if there is an emerging plan)
Plan period: 2011-2033.				
Chelmsford Local Plan[14] (2020). Plan period: 2016 – 2036.	180,000 (8,980 per annum)		16,675 new jobs	
Emerging North Hertfordshire – Local Plan[15]. Plan period: 2011-2031.		13,000		32,000 Ha of employment land
Harlow - Harlow Local Plan[16] (2020). Plan period: 2011-2033.	9,200		18 to 20 Ha of employment land	

[14] https://www.chelmsford.gov.uk/planning-and-building-control/planning-policy-and-new-local-plan/new-local-plan/adopted-local-plan/

[15] https://www.north-herts.gov.uk/home/planning/planning-policy/local-plan including 2016 Proposed submission local plan for economic figures and Schedule of Further Proposed Modifications to the North Hertfordshire Local Plan 2011-2031 for housing requirements.

[16] https://www.harlow.gov.uk/planning-and-building-control/planning-policy/harlow-local-development-plan/harlow-local

Key infrastructure coming forward in neighbouring districts

The infrastructure plans in surrounding districts have been reviewed in relation to strategic infrastructure which may have cross boundary implications affecting Uttlesford. This is summarised in **Table 2.2**. This is not an exhaustive list but includes the most strategic, high level schemes which have the greatest potential to affect residents and employees in Uttlesford.

Table 2.2: Infrastructure projects in neighbouring areas with potential implications for Uttlesford

District or shared plan area (if larger than one district)	Infrastructure Topic	Infrastructure projects with potential cross-boundary implications
Greater Cambridge (a joint plan being prepared by South Cambridgeshire and Cambridge City Councils)	Transport	**Cambridge South station** The new station is proposed to be located adjacent to the Guided Busway and will provide a new transport choice available to patients, visitors and employees when travelling to and from the Cambridge Biomedical Campus[17]. The station will improve Uttlesford residents access to south Cambridge.
Greater Cambridge (a joint plan being prepared by South Cambridgeshire and Cambridge City Councils)	Transport	**A10 improvements** The A10 is located near the north-western boundary of Uttlesford and may be used by some residents for journeys north. It is subject to two projects, the Cambridge and Peterborough Combined Authority's (CPCA) A10 dualling and the Greater Cambridge Partnership's Waterbeach to Cambridge Better Public Transport project. The CPCA has consulted on the options for dualling the A10 and submitted a strategic outline business case in August 2020[18]. Improvements to this route may result in less demand on routes which are likely to be used by Uttlesford residents travelling northbound including the M11, A1301, A1307.
Greater Cambridge (a joint plan being prepared by South Cambridgeshire and Cambridge City Councils)	Transport	**Cambridge South East Transport** This project aims to provide better public transport, walking and cycling options for those who travel in the A1307 and A1301 area, improving journey times and linking communities and employment sites in the area south east of Cambridge. Following consultation of the Phase 2 proposals, a preferred route and location for a Travel Hub has been agreed. This is project is now subject to preparation of a full EIA for its next stage[19]. This is likely to improve journey times for those travelling between Cambridge and Uttlesford.
Greater Cambridge (a joint plan being prepared by South Cambridgeshire and Cambridge City Councils)	Water supply	**South Lincolnshire Reservoir and new pipeline** In order to address water scarcity issues in Cambridgeshire and the East of England more generally Anglian Water are developing proposals to construct a new reservoir in South Lincolnshire and 500km of pipeline linking this to Uttlesford and other destinations in east Essex[20].

[17] https://greatercambridgeplanning.org/media/1426/gclp-strategic-spatial-options-assessment-infrastructure-delivery-plan-nov2020.pdf
[18] https://greatercambridgeplanning.org/media/1426/gclp-strategic-spatial-options-assessment-infrastructure-delivery-plan-nov2020.pdf
[19] https://greatercambridgeplanning.org/media/1426/gclp-strategic-spatial-options-assessment-infrastructure-delivery-plan-nov2020.pdf

[20] https://greatercambridgeplanning.org/media/1426/gclp-strategic-spatial-options-assessment-infrastructure-delivery-plan-nov2020.pdf

District or shared plan area (if larger than one district)	Infrastructure Topic	Infrastructure projects with potential cross-boundary implications
Braintree	Transport	**A120 Braintree to A12** In 2018, ECC announced its favoured route option (D) for an upgraded dualled A120 between Galleys Corner on the south-eastern edge of Braintree, to a junction with the A12 south of Kelvedon. The scheme is identified as a 'pipeline project' in RIS2 (2020 – 2025) and will undergo more analysis and design work by National Highways ahead of being considered for potential future investment and inclusion in RIS3 (2025 – 2030). This will provide additional capacity and improve safety and resilience along the A120 and will reduce journey times and congestion when travelling between Uttlesford and destinations to the east such as Kelvedon, Witham, Colchester and Clacton on Sea.
Braintree	Transport	**A120 Millennium Way Slips** A planning application was approved in August 2020 to provide a pair of slip roads to connect the A120 eastbound carriage to Millennium Way (B1018) northbound; and Millennium Way northbound and southbound to the A120 westbound carriage. These will provide direct access on and off the A120 to and from the west removing the need to utilise Galleys Corner Roundabout (as existing). The development is designed to relieve traffic congestion at Galleys Corner Roundabout as a medium-term solution, in advance of a longer-term and separate improvement scheme for the A120 that National Highways are currently progressing. The scheme has also been designed to work alongside both the existing and wider vision for the A120. Subject to the completion of detailed design construction could commence in 2023.
Braintree, Colchester and Chelmsford	Transport	**A12 Chelmsford to A120 widening scheme** This is a committed and funded scheme in RIS 1 and 2 involving the widening the A12 between Chelmsford (junction 19) and the A120 Marks Tey interchange (junction 25) to three lanes including new and upgraded junctions[21]. This project will reduce traffic congestion by increasing capacity; improve safety and resilience and make improvements for walkers, cyclists, horse riders and public transport. The scheme is likely to improve journey times when travelling between Uttlesford and destinations to the east, by reducing congestion affecting the A120 with local traffic using the A12. Surveys and ground investigations are currently being undertaken and, subject to funding, work is due to begin in 2023-24. The road is planned to be open for traffic in 2027/2028. The scheme takes into account evolving proposals for the A120 Braintree to the A12 scheme.
Braintree	Transport	**Improvements to the Mark Farm Roundabout on the A120/A131 junction east of Braintree**[22] This will increase capacity at the junction and significantly reduce queues and delays on the A131. The existing delay at Marks Farm results in vehicles diverting through Braintree urban area. The proposed improvement at Marks Farm roundabout will lead to the principal road network being more attractive than Broad Road and lead to the re-distribution of traffic currently using Broad Road as a 'rat-run'. This scheme will improve journey times for travel between Uttlesford and destinations in east Braintree.

[21] https://www.braintree.gov.uk/downloads/file/3260/bdc058-infrastructure-delivery-plan-update-june-2021
[22] https://www.braintree.gov.uk/downloads/file/3260/bdc058-infrastructure-delivery-plan-update-june-2021

District or shared plan area (if larger than one district)	Infrastructure Topic	Infrastructure projects with potential cross-boundary implications
Braintree	Education	**Secondary education** The removal of the anticipated 'West of Braintree' garden community will require a new strategy for the provision of secondary education in Braintree[23]. The Braintree IDP sets out that the growth proposed in the Section 1 plan can be accommodated, however this only goes only to 2033, so this issue is likely to arise in the longer term. The flow of pupils between Uttlesford and Braintree may be a factor worth considering in terms of planning new provision.
Braintree	Health	**Great Notley Health Centre** A new health facility is proposed to serve the needs of Great Notley, but will also serve the needs of Chelmsford – the location of which is undecided and may be in either Great Notley or Chelmsford City Council area[24]. It is likely given the geographic relationship that residents in south Uttlesford may also use this facility.
Chelmsford	Transport	**Radial Distributor Road (RDR1) and junction improvements** As part of the approved development at Beaulieu Park and Channels a new link road (RDR1) is being built between Essex Regiment Way (A130) and junction 19 of the A12 and is expected to be completed around Autumn 2022[25]. As part of this project the following additional improvements are also being undertaken: ■ Improvements along Essex Regiment Way (the A130) to create a sustainable transport corridor largely funded by the new Chelmsford Garden Community. ■ Capacity improvements along Colchester Road, between White Hart Lane roundabout and Drovers Way roundabout, have been implemented. This project will improve connectivity between Chelmsford, Braintree and destinations along the A12.

[23] https://www.braintree.gov.uk/downloads/file/3260/bdc058-infrastructure-delivery-plan-update-june-2021
[24] https://www.braintree.gov.uk/downloads/file/3260/bdc058-infrastructure-delivery-plan-update-june-2021
[25] https://www.chelmsford.gov.uk/EasySiteWeb/GatewayLink.aspx?alId=1124102

District or shared plan area (if larger than one district)	Infrastructure Topic	Infrastructure projects with potential cross-boundary implications
Chelmsford	Transport	**Chelmsford North East Bypass** This will provide a key strategic missing link in the Essex road network on the A131, and will increase highway capacity and reduce journey times from Chelmsford to Braintree and onwards to Uttlesford. Phase 1 is planned to be operational in 2024. Additional highway infrastructure is also required associated with this project[26]. This includes: - Phase 1 involves the online dualling of the existing A131 Braintree Road between Deres Bridge and a new roundabout at Chatham Green. A new single carriageway will connect to the Beaulieu Park Radial Distributor Road (RDR1), which has largely been completed. An intermediate roundabout for future connection into the Chelmsford Garden Community (CGC) and second distributor road (RDR2) will be provided along with the construction of new roundabout at Chatham Green and CGC RDR2 junction. - Phase 2 involves the future creation of the southbound dual carriageway created by adding additional southbound carriageway. Chelmsford Garden Community junction will be upgraded and expanded creating slip roads with new dual carriageway below. Extended dual carriageway towards the A12 at Boreham Interchange with an additional new junction near Beaulieu Station. This project will provide a strategic link between Chelmsford, Braintree, London Stansted Airport and the wider area including easier access to the upgraded A12
Chelmsford	Transport	**Beaulieu Park rail station** A new railway station directly serving the Beaulieu Park development in North Chelmsford[27]. This will help to reduce the need to travel to, and alleviate pressure at the current Chelmsford and Witham stations. The scheme will include a passing loop enabling trains to pass each other at the station to improve reliability of the whole GEML. A transport interchange will connect to new and existing bus, footway and cycling networks, encouraging sustainable travel to the station and for onward travel. This work will be undertaken by Network Rail and is estimated to be operational by 2025/26.

[26] https://www.chelmsford.gov.uk/EasySiteWeb/GatewayLink.aspx?alId=1124102
[27] https://www.chelmsford.gov.uk/EasySiteWeb/GatewayLink.aspx?alId=1124102

District or shared plan area (if larger than one district)	Infrastructure Topic	Infrastructure projects with potential cross-boundary implications
Chelmsford	Transport	**Great Eastern Mainline Investment Programme** The Great Eastern Main Line Study (July 2019) further endorsed the Anglia Route Study (2016) recommendations regarding the need for the following projects to be further investigated to potentially provide railway capacity improvements[28], including: - upgrading overhead cables; - Bow Junction reconfiguration; - increase of line speeds between London Liverpool Street and Norwich; - replacement of existing rolling stock to increase capacity (including on the Southminster Line); - increases to track capacity north of Chelmsford. This work is being undertaken by Network Rail at a cost of £476m and will also improve the infrastructure for Uttlesford residents accessing London Liverpool Street.
Chelmsford	Water treatment	**The Water Recycling Centre (WRC) at Great Leighs** This has been identified as requiring enhancement to treatment capacity and/or site related mitigation measures[29]. This will impact on development at Great Leighs/Moulsham Hall in north Chelmsford. Costs are unknown at present, but it is likely that it will be funded through the Asset Management Plan (AMP).
Epping Forest	Transport	**Creation of a new Junction on the M11 (junction 7a)** Construction began in 2020 and will be complete by 2022[30]. A new link road is also provided as part of this project, linking to Harlow. This will improve journey times for vehicles travelling between Uttlesford and Harlow.
Epping Forest	Transport	**Increased Rail Capacity** Additional rail capacity through longer carriages (funded by Network Rail) are to be provided for journeys into London[31]. This will also improve capacity for Uttlesford residents travelling to London and destinations nearby.
East Hertfordshire	Transport	**East Herts Rapid Transport System** A new rapid transport system linking Hemel Hempstead in the west to Harlow and then potentially on to Stansted Airport. This will improve connectivity westwards through Harlow and into Hertfordshire[32].

[28] https://www.chelmsford.gov.uk/EasySiteWeb/GatewayLink.aspx?alId=1124102
[29] https://www.chelmsford.gov.uk/EasySiteWeb/GatewayLink.aspx?alId=1124102
[30] Essex Highways (2021) M11 Junction 7a [online]. Available at: https://essexhighways.org/m11-junction-7a
[31] Epping Forest (2017) Infrastructure Delivery Plan [online]. Available at: https://www.eppingforestdc.gov.uk/wp-content/uploads/2019/05/6Jun17-Report-on-IDP.pdf
[32] Hertfordshire County Council (2021) Introducing the Hertfordshire - Essex Rapid Transit (HERT) [online]. Available at: https://www.hertfordshire.gov.uk/about-the-council/news/news-archive/hertfordshire-essex-rapid-transit

District or shared plan area (if larger than one district)	Infrastructure Topic	Infrastructure projects with potential cross-boundary implications
East Hertfordshire	Education	**Expanded and new secondary schools in Bishop's Stortford** The permitted development to the north of Bishop's Stortford includes a new secondary school (6FE). The Bishop's Stortford South development includes land for a 6FE secondary school that can be expanded to 8FE when there is demand[33]. Whilst the cross-boundary movements between Uttlesford and Bishop's Stortford are not known this may affect high school provision requirements in the west of Uttlesford, particularly at Forest Hall School in Stansted Mountfitchet.
East Hertfordshire	Education	**Secondary school expansion in Leventhorpe** Leventhorpe School in Sawbridge is currently considering a project to expand by 2FE[34]. Whilst the cross-boundary movements between Uttlesford and Bishop's Stortford are not known this may affect high school provision requirements in the west of Uttlesford, particularly at Forest Hall School in Stansted Mountfitchet.

2.13 As can be seen, there are a significant amount of infrastructure projects coming forward in the surrounding area which have the potential to benefit residents and employees in Uttlesford.

[33] East Herts Council (2017) Infrastructure Delivery Plan [online]. Available at: https://cdn-eastherts.onwebcurl.com/s3fs-public/documents/IDM.001_Infrastructure_Delivery_Plan.pdf
[34] East Herts Council (2017) Infrastructure Delivery Plan [online]. Available at: https://cdn-eastherts.onwebcurl.com/s3fs-public/documents/IDM.001_Infrastructure_Delivery_Plan.pdf

Chapter 3
Infrastructure Baseline

This chapter describes the current infrastructure provision within Uttlesford.

3.1 This chapter covers the following topics:

- Transport and the public realm;
- Education;
- Green infrastructure, open space and sports;
- Health and Wellbeing;
- Utilities;
- Waste management;
- Flooding and drainage;
- Community; and
- Emergency services;

3.2 A summary of the critical issues and implications arising in relation to climate change and the ecological crisis is also provided.

Transport and the public realm

Overview

3.3 As set out in chapter two, the district has a dispersed settlement pattern, with a network of relatively small settlements. The need to travel between settlements to access a range of services and employment opportunities results in higher levels of car ownership and use compared to the national average[35,36]. Residents in Uttlesford also travel further to work, compared to the residents of other districts in Essex[37].

3.4 The district's main transport corridor runs north / south, and includes the M11 motorway and West Anglia Rail Line.

[35] WYG (2016) Uttlesford Local Plan Transport Study [online]. Available at: https://uttlesford.moderngov.co.uk/Data/Planning%20Policy%20Working%20Group/201706221900/Agenda/Document%204.pdf

[36] Uttlesford District Council (2014) Uttlesford cycling strategy [online]. Available at: https://www.uttlesford.gov.uk/media/4604/Uttlesford-Cycling-Strategy-October-2014/pdf/The_Uttlesford_Cycle_Strategy_PDFA.pdf?m=637031088129270000

[37] Aecom (2017) Greater Essex Growth and Infrastructure Framework 2016-2036 [online]. Available at: https://data.essex.gov.uk/dataset/20kr8/greater-essex-growth-and-infrastructure-framework-20162036

These provide access to Cambridgeshire, Peterborough and Bury St Edmunds to the north and Harlow and London to the west and South. Settlements in the east of the district are more remote from this main transport corridor, with access to the M11 being only available in the south-west of the district and beyond the north-west extremities of the District. The B3183 also provides a key north-south link in the district.

3.5 In the south of the district the A120 trunk road is the main strategic east-west highway corridor and provides access to and intersects with the M11 at Junction 8. This route provides dual carriageway access to Braintree to the east and single carriageway access further eastwards towards Colchester, Harwich and Felixstowe via the A12.

3.6 Stansted Airport lies at the junction of the M11, West Anglia Rail Line and A120, and as such benefits from a high level of strategic accessibility. As the third busiest airport in the UK it is a destination for a significant amount of people, both passengers and workers, and is therefore a significant trip generator.

Topic specific context

Air travel

3.7 London Stansted is located in the south west of the district and is a major international gateway to the UK. The airport brings significant economic opportunity to the district and surrounding areas. The airport has recently been granted planning permission to expand to 43 million passengers a year (an increase of 8 million over the previously consented position).

3.8 Audley End and Rayne airfields provide for aviation activities but do not serve commercial passenger services.

The rail network

3.9 The existing Essex rail network is primarily radial from London, with no direct east-west link. Passenger services are provided by private sector operators, under franchises agreed with the Strategic Rail Authority and the Department for Transport[38].

3.10 Services currently run from six railway stations on the West Anglia Rail Line which are all managed by Abellio, the Train Operating Company (TOC) for the Greater Anglia Franchise[39]. The line runs north-south and stations serve Great Chesterford, Audley End, Newport, Elsenham, Stansted Mountfitchet and Stansted Airport. Service frequencies differ between stations, with Audley End providing faster, less frequently stopping trains between Cambridge and Liverpool Street Station in London. Rail stations just outside the district are also important such as Whittlesford Parkway and Bishop's Stortford, as these also offer faster train services.

3.11 The line facilitates three routes: the Stansted Express which connects London Liverpool Street directly with Stansted Airport; the West Anglia route which connects all stations in Uttlesford (except for Stansted Airport) to London, Cambridge and Bury St Edmunds; and the Regional route which runs between Stansted Airport and towns such as Peterborough and Norwich to the north. The Anglia Route Study[40] examines options to improve the railway in East Anglia, setting out a long term strategy to meet growing passenger and freight demand on the railway from 2019 and beyond. This strategy sets out that there will be a need to provide further capacity for approximately 1,000 passengers by 2023 and 2,100 by 2043 in the peak hour on the Cambridge and Stansted Airport services into London Liverpool Street. On suburban services further capacity for 1,700 passengers by 2023 and an additional 4,200 passengers by 2043 will be required. In an Uttlesford context, this means that by 2023, in the morning peak for journeys into London Liverpool Street, all seats are full south of Audley End. New capacity is proposed to relieve this pressure, the strategy sets out that by 2043 seats will be available (albeit up to 85% taken) in 2043 due to the capacity increases.

3.12 From 2023 the management of railways will be undertaken by a new public body called Great British Railways[41]. This body will integrate the railways, owning the infrastructure, collecting fare revenue, running and planning the network, and setting most fares and timetables. The purpose of this reform is to deliver improvements to ticketing, timetables and capacity. As this change has been announced recently it is unclear at this stage what the direct implications will be in Uttlesford.

The bus network

3.13 ECC is the local transport authority covering Uttlesford. In Uttlesford, the commercial operators decide in the first instance which routes to operate. ECC's role is to commission services to fill any gaps in provision not provided by the

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[38] Essex County Council (2006) Essex Rail Strategy [online] Available at: https://assets.ctfassets.net/knkzaf64jx5x/1rBdsfuF3TqDrl0nZL7YGB/1c517d20ad394a0b32f8fef2d3808242/rail-strategy.pdf

[39] HM Government (2016) East Anglia Rail Franchise Agreement [online]. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1007702/east-anglia-franchise-agreement-v5-8.pdf

[40] [40] Network Rail (2016) West Anglia Main Line Long Term Study [online] Available at: https://www.networkrail.co.uk/wp-content/uploads/2016/12/Anglia-Route-Study-March-2016.pdf

[41] HM Government (2021) Great British Railways: for the passenger [online]. Available at: https://www.gov.uk/government/news/great-british-railways-for-the-passenger

market. Bus services in Uttlesford are provided both commercially and with financial support from the councils and developer contributions, however it is important to note that bus services have been seriously affected by the pandemic and have received significant public funding to maintain the financial position of operators.

3.14 The fact that the majority of the District is very rural makes it difficult to deliver commercially viable and attractive bus services to all settlements where there is currently less demand. It also means that many residents have to make less direct bus journeys, with interchanges.

3.15 The presence of Stansted Airport creates demand for high frequency rail and bus services in the south of the District. However, the frequency of bus services is comparatively much lower in other areas of the District, as would be expected in the mostly rural hinterland. Aside from London Stansted Airport, Saffron Walden and Great Dunmow offer the greatest potential for interchange. Cost of bus travel also varies significantly.

3.16 The UK Government published the national bus strategy 'Bus Back Better' in March 2021[42]. This makes it clear that better bus services are seen as a key part of the Government's 'levelling up' agenda by improving public transport outside London. Amongst other things the strategy asks local transport authorities to commit either to setting up 'enhanced quality bus partnerships' or adopt bus franchising and to make a statement to that effect.

3.17 In response to Bus Back Better, and following ECC Cabinet discussions[43], ECC has prepared a Bus Service Improvement Plan[44] (BSIP), setting out standards for the bus industry in the ECC area. This is a working document which will be improved over time in accordance with the requirements of Bus Back Better. The plan sets out funding for improvements to key bus services across Essex. In Uttlesford, the key services include 'Thrive', a programme set out to improve access to services in rural centres, and 'Reach', which considers the potential to provide improved demand - responsive public transport solutions, in particular looking at the role of digital tools for this. The BSIP also proposes the upgrading of park and ride services to 'park and choose' sites, which will offer more options for other (non-bus transport measures including e-bikes and e-scooter rental). The BSIP also proposes a bus services audit and review, which will consider the current provision of routes and whether this could be improved for users.

3.18 In order to help deliver the BSIP, ECC sets out the intention to create an Enhanced Quality Partnership Scheme (one for each district). This is a statutory partnership between ECC and the bus operators that sets out how they will identify and deliver improvements to bus services. Given this is a statutory agreement, this arrangement will provide more control to ECC over the management of the bus network in the ECC area, compared to the previous situation.

3.19 Furthermore, ECC is developing a new North West Essex Bus Network, which will seek to improve timetables and reduce costs in Uttlesford and surrounding area. Also, a recent consultation by the Greater Cambridge Partnership proposes a fast (40 minutes quicker than current time) and frequent (every ten minutes) service between Cambridge and Saffron Walden via the Biomedical Campus[45].

3.20 In addition, the Sustainable Modes of Travel Strategy (SMoTS)[46] outlines the steps ECC is taking to enable accessibility for all to places of employment and education, including other neighbourhood services such as retail, leisure and health services and delivering health, social and economic benefits to individuals and their communities. A Community Travel System[47] provides transportation to those unable to access normal public transport. Further to this, as

[42] HM Government (2021) Bus back Better: national bus strategy for England [online]. Available at: https://www.gov.uk/government/publications/bus-back-better

[43] Essex County Council (2021) Report to Cabinet Committee [online]. Available at: https://cmis.essex.gov.uk/essexcmis5/Document.ashx?czJKcaeAi5tUFL1DTL2UE4zNRBcoShgo=mDr9WU9dzY1JXgMYASeqXL6QPvXA0Rx7xFJ1iN7QszS4Y7JebTLGrQ%3d%3d&rUzwRPf%2bZ3zd4E7Ikn8Lyw%3d%3d=pwRE6AGJFLDNlh225F5QMaQWCtPHwdhUfCZ%2fLUQzgA2uL5jNRG4jdQ%3d%3d&mCTIbCubSFfXsDGW9IXnlg%3d%3d=hFflUdN3100%3d&kCx1AnS9%2fpWZQ40DXFvdEw%3d%3d=hFflUdN3100%3d&uJovDxwdjMPoYv%2bAJvYtyA%3d%3d=ctNJFf55vVA%3d&FgPlIEJYlotS%2bYGoBi5olA%3d%3d=NHdURQburHA%3d&d9Qjj0ag1Pd993jsyOJqFvmyB7X0CSQK=ctNJFf55vVA%3d&WGewmoAfeNR9xqBux0r1Q8Za60lavYmz=ctNJFf55vVA%3d&WGewmoAfeNQ16B2MHuCpMRKZMwaG1PaO=ctNJFf55vVA%3d

[44] Essex County Council (no date) The Essex County Council Bus Service Improvement Plan 2021 to 2026 [online]. Available at: https://cmis.essex.gov.uk/essexcmis5/Document.ashx?czJKcaeAi5tUFL1DTL2UE4zNRBcoShgo=jrBwz35oQLFfwom8%2fAJ6I%2bTokm%2bu98V%2bNIRTINxD9cedWidLWoqz%2bw%3d%3d&rUzwRPf%2bZ3zd4E7Ikn8Lyw%3d%3d=pwRE6AGJFLDNlh225F5QMaQWCtPHwdhUfCZ%2fLUQzgA2uL5jNRG4jdQ%3d%3d&mCTIbCubSFfXsDGW9IXnlg%3d%3d=hFflUdN3100%3d&kCx1AnS9%2fpWZQ40DXFvdEw%3d%3d=hFflUdN3100%3d&uJovDxwdjMPoYv%2bAJvYtyA%3d%3d=ctNJFf55vVA%3d&FgPlIEJYlotS%2bYGoBi5olA%3d%3d=NHdURQburHA%3d&d9Qjj0ag1Pd993jsyOJqFvmyB7X0CSQK=ctNJFf55vVA%3d&WGewmoAfeNR9xqBux0r1Q8Za60lavYmz=ctNJFf55vVA%3d&WGewmoAfeNQ16B2MHuCpMRKZMwaG1PaO=ctNJFf55vVA%3d

[45] Greater Cambridge Partnership (2021) Making Connections [online]. Available at: https://consultcambs.uk.engagementhq.com/making-connections-2021

[46] Essex County Council (2020) Sustainable Modes of Travel Strategy [online]. Available at: https://assets.ctfassets.net/knkzaf64jx5x/5T3h7kDuqTwZg7tzYY21E0/ab09f8690bbf33459832cfb59f89100c/ECC_Sustainable_Modes_of_Travel_Strategy_2020.pdf

[47] Essex County Council (no date) Community Based Transport Schemes in Essex [online] Available at: https://www.essex.gov.uk/accessible-transport

outlined in the ECC Education Transport Policy[48], free school to home transport is also available to some children of compulsory school age in the County.

The road network

3.21 The M11 and A120 are managed by National Highways. All other roads in Uttlesford are managed and maintained by ECC as the Local Highways Authority – apart from those at Stansted as these roads are managed as part of the airport. Transport East is the Sub-national Transport Body for Norfolk, Suffolk, Essex, Southend-on-Sea and Thurrock. As a partnership of key transport organisations, this provides leadership and strategy about regional transport matters.

3.22 As set out above, the M11 Motorway comprises the main north-south highway corridor in Uttlesford and connects London to the south with Cambridge to the north. Junctions 9 and 9a are located along the northern boundary of the District and connect users with the A11 towards Norwich and provides strategic access for settlements such as Saffron Walden and Great Chesterford. Junction 8 is located to the south of Uttlesford and provides connections to Bishop’s Stortford and Stansted Airport. As set out above the location of the M11 junctions results in poorer accessibility to the strategic road network for those in the north east of the district.

3.23 Important smaller inter-urban roads in Uttlesford include the B1383 which provides local north-south connections between Bishop’s Stortford and Great Chesterford, the B184 which connects Great Dunmow with Thaxted, Saffron Walden and Junction 9a of the M11, as well as the A1060 which connects Bishop’s Stortford with Hatfield Heath and onto Chelmsford to the south-east, the B1008 between Dunmow and Chelmsford, and the B1256 (the old A120) between J8 and Rayne/Braintree. Outside the district the A505, A131 are also key routes providing access to wider strategic links or to other key attractors (e.g. Chelmsford).

3.24 There are peak period highway congestion issues in the west and south-west of the district, both on the strategic network of the A120 and at Junction 8, as well as on the A505 beyond the north of the district. The B1383 also experiences significant peak period congestion, particularly through the settlements of Newport (particularly at the pinch point at Newport rail bridge in the High Street due to height restrictions and flooding) and Stansted Mountfitchet and on its approach to the A120 north of Bishop’s Stortford. The B184 experience peak hour congestion, particularly in Thaxted. The historic street layout of settlements in the District means that there are also peak period congestion issues in Great Dunmow and Saffron Walden. Planned developments in the north of Bishop’s Stortford and local growth planned in East Herts and Uttlesford will lead to an increasing amount of traffic using the junctions in the years ahead as London Stansted Airport continues to grow. ECC plan to improve Junction 8 of the M11 and A1250 West by[49] :

- Improving access between the M11 and A1250 with London Stansted Airport, Bishop's Stortford, Birchanger Services and Takeley
- Reducing congestion and improve capacity on the M11 Junction 8 exit slips and the A120
- Supporting future plans for housing, employment and business developments.

3.25 The above improvements are considered to be an interim solution in advance of a more significant upgrade, subject to funding.

3.26 A route corridor study of the A505 between its junction with the A10 at Royston in Hertfordshire and the A11 at Abington in Cambridgeshire is currently being undertaken to ascertain if capacity improvements are required and how these can be delivered.

Walking and cycling

3.27 The two routes on the National Cycle Network that run through Uttlesford are NCR11 and NCR16. NCR11 runs north-south through the District and connects Harlow to Cambridge via Stansted Mountfitchet and Strethall, with a link to Saffron Walden via Audley End Station. NCR16 is mainly off-road, utilising the former railway track bed (although does use roads in Great Dunmow). This is also known as the Flitch Way and runs east-west broadly in the same area as the A120, connecting Birchanger in the West with Braintree in the east and then travels southwards towards Witham.

3.28 Just 1% of the journeys to work in Uttlesford are made by bicycle, lower than the Essex average of 2.1%[50]. A key reason for this may be that, other than the above, there is very little dedicated cycling infrastructure in Uttlesford, which has resulted in in low levels of participation when compared with other Essex Boroughs / Districts[51]. It may also be due to the

[48] Essex County Council (no date) Education Transport Policy [online] Available at: https://assets.ctfassets.net/knkzaf64jx5x/4eTjOc335IeWasUfvCkJrP/7a59e29546f855f397eba8906cb24086/Education_Transport_Policy.pdf
[49] Essex Highways (no date) M11 Junction 8 Scheme Updated [online] Available at: https://www.essexhighways.org/highway-schemes-and-developments/highway-schemes/m11-junction-8-improvement-scheme
[50] Uttlesford District Council (2014) Uttlesford cycling strategy [online]. Available at: https://www.uttlesford.gov.uk/media/4604/Uttlesford-Cycling-Strategy-October-2014/pdf/The_Uttlesford_Cycle_Strategy_PDFA.pdf?m=637031088129270000
[51] Essex County Council (2016) Essex Cycling Strategy [online] Available at: https://www.essexhighways.org/uploads/downloads/ecc-cycling-strategy-novemeber-2016.pdf

topography of settlements, which are relatively hilly compared to other areas where cycling is a more popular way of getting around. This said, recreational cycling is popular in Uttlesford (there appears to be more persons cycling at least once per month in Uttlesford than in other Essex districts apart from Chelmsford), and the increasing popularity of e-bikes can help to overcome the implications of hills.

3.29 The Essex and Uttlesford Cycle Strategies seek to promote a sustained increase of cycling in Uttlesford, establishing it in the public's mind as a 'normal' mode of travel, especially for short a-to-b trips.

Key delivery organisations

- Transport East
- National Highways
- Network Rail
- Sustrans
- ECC – Local Transport Authority / Local Highway Authority
- MAG (Stansted)
- Abellio Buses
- Arriva Buses
- Uttlesford Community Travel

Funding

3.30 Funding for aviation improvements at Stansted are raised by MAG through their business plans. Aviation is generally commercially operable and therefore development contributions are not collected for improvements to airport infrastructure (although may be for other forms of travel that link to Stansted, such as buses).

3.31 Funding for rail improvements is provided by the UK government and is allocated based on the priorities identified in The Anglia Route Study[52].

3.32 Funding for highways comes from a range of sources. Strategic highways such as the M11 and A120 are maintained by National Highways and new schemes are funded generally by government grants or loans, whilst developer contributions are also put towards these if there is sufficient justification. Local highways (i.e. those managed by ECC) are funded through the council's maintenance budget (which is largely funded by the government) and Local Transport Plan budget. Developer contributions are also an important element of funding for highway improvements.

3.33 Funding for buses comes from a mixture of sources but the predominant sources include the bus operators as part of their business model, ECC's local transport plan allocation and developer contributions.

3.34 Funding for new cycling and walking infrastructure predominantly comes from ECC Local Transport Plan funding and developer contributions.

3.35 As set out above, developer contributions are required for transportation improvements in Uttlesford where these can be justified in accordance with the relevant tests for planning obligations[53], and are secured through Section 106 and section 278 agreements[54]. The Essex developer's guide to infrastructure contributions[55] sets out that developers are expected to contribute towards the following types of transport infrastructure:

- Highway improvements to facilitate access or anticipated road safety implications of development;
- Supporting public transport by funding diversions to existing routes (if this can be achieved whilst maintaining the overall attractiveness of the service) or new services. For developments of 1,000 or more new homes a full integrated travel package is required;
- Diversions to public rights of way, if necessary and acceptable in accordance with relevant legislation.

Critical issues and implications

3.36 The following critical issues and implications arise as a result of the current provision, growth context, Covid-19, climate change and the ecological crisis.

3.37 The transport key issue for district is to reduce the need to travel (in terms of journeys made and the distance of those journeys) and ensure that when journeys are necessary, that these are undertaken in the most sustainable manner. The delivery of new housing infrastructure and employment in close proximity is key to providing opportunities to reduce the need to travel.

[52] [52] Network Rail (2016) West Anglia Main Line Long Term Study [online] Available at: https://www.networkrail.co.uk/wp-content/uploads/2016/12/Anglia-Route-Study-March-2016.pdf
[53] HM Government (2010) The Community Infrastructure Regulations [online]. Available at: https://www.legislation.gov.uk/uksi/2010/948/regulation/122/made
[54] Essex County Council (2020) Essex County Council Developers' Guide to Infrastructure Contributions 2020 [online] Available at: https://www.essex.gov.uk/planning-advice-guidance/guidance-for-developers
[55] Essex County Council (2020) The Essex County Council Developers' Guide to Infrastructure Contributions [online]. Available at: https://assets.ctfassets.net/knkzaf64jx5x/5aKhke88Ey5zkdMvSQj44w/0d71817cad70b9394d76e7a490ac7bd7/developers-guide-infrastructure-contributions.pdf

3.38 The provision of high-speed internet connections is also vital to help in reducing the need to travel, enabling residents to access services and opportunities without the need to travel to some of those facilities, for example through using online shopping, taking part in remote working or leisure pursuits and enabling new models of service delivery such as remote GP services.

3.39 As set out above, where journeys are necessary, a shift away from private car-based vehicle use towards more active and sustainable forms of travel such as walking, cycling and buses must be a fundamental element of achieving carbon reductions. Car ownership and use is very high, and the use of public transport, walking and cycling are particularly low in Uttlesford. Significant effort to creating improved and new cycle routes should be made, alongside travel planning, educational and other support measures to deliver this transition. Electric scooters and electric bikes powered by renewable energy can be a key tool in encouraging people not to use their car, and are cited as one of the key steps to reaching net zero by 2050 in the Essex Climate Actions Commission report[56]. Further to this, the VeloCity concept whereby a cluster of villages 'share' their services, and are linked by high quality cycling infrastructure which connects to rail stations and high frequency bus services, may help to support a transition towards more sustainable travel.

3.40 The effects of the Covid-19 pandemic have accelerated a transition to more flexible working patterns particularly home working. This has resulted in significantly reduced commuting, resulting in less pressure on transport links. Whilst this has resulted in less congestion, the use and viability of public transport has fallen dramatically. Working patterns in the future are yet to become established and these will inform the need and requirement for new transport infrastructure.

3.41 New developments offer the greatest potential to change travel behaviours for residents and should be designed so as to facilitate the use of more active and sustainable modes of travel from a very early stage in that development. Designing large scale developments in accordance with the principles of '20-minute' neighbourhoods[57] will help to achieve this.

3.42 As set out in the POST, a focus on developing at existing centres and on the existing transport networks, particularly those which offer (or could offer) high quality and attractive sustainable travel choices is likely to deliver the greatest benefits in terms of:

- Reducing the need to travel by placing people near services and employment;
- Making most efficient use of existing infrastructure (which is likely to improve development viability by not creating a demand for new infrastructure related to all development);
- Encouraging journeys by sustainable modes by placing origins and destinations near each other and near sustainable transport hubs such as rail stations.

Education

Overview

3.43 ECC has duties under the Childcare Acts of 2006 and 2016 to ensure that there are a sufficient number of sustainable and high quality childcare places for children aged 0-19 and their families. In addition duties under the Education Act 2011 require ECC to provide sufficient school places for 4-16 year olds. As such, education is in the most part provided for by ECC. Free Schools and Academy Schools are outside local authority control but are still influenced by potential growth and are therefore considered in pupil place planning.

3.44 Private schools and home schooling also contribute to education in the district, but these are not considered as part of this IDP, for private schools this is because they operate on a different demand model and are not responsible for ensuring all children have a place, and for home schooling because there are minimal infrastructure implications.

3.45 Demographics in Uttlesford indicate a high demand for early years & childcare and school places across the age ranges[58].

Education context

Early Years and childcare

3.46 Early years and childcare provision in Uttlesford includes day nurseries, pre-school provision and childminders:

- Early Years and Childcare in Uttlesford includes full-day nurseries, who mainly cater for working families who need full day care.
- Pre-School provision generally offers comparatively limited hours per day, similar to that of a school day and

[56] Essex Climate Action Commission (2021) Net Zero: Making Essex Carbon Neutral [online]. Available at: https://assets.ctfassets.net/knkzaf64jx5x/1fzMJKNmIfz8WHx4mzdy2h/e7c57523466f347fd6cdccb3286c113c/Net-Zero-Report-Making-Essex-Carbon-Neutral.pdf
[57] Town and Country Planning Association (2021) 20-Minute Neighbourhoods [online]. Available at: https://www.tcpa.org.uk/Handlers/Download.ashx?IDMF=f214c4b8-ba4d-4196-9870-e9d240f86645
[58] Essex County Council (2019) Childcare Sufficiency Assessment Summary [online]. Available at: https://assets.ctfassets.net/knkzaf64jx5x/7lKntMzJWxZ3OaA7QTLR54/d88f849526410eb4b17607c85b635e49/Early_Years_Sufficiency_Report_2019.pdf

does not open during the school holidays. Some of these are provided in co-located facilities with primary school provision.

- Childminders can often provide a flexible support for families and will pick up older children at the end of the school day which in turn helps families with childcare to enable them to work.

3.47 These education needs are delivered through mainly private, independent and voluntary organisations and any change in demand for childcare can have a detrimental effect upon the sustainability of the different business models.

3.48 In Uttlesford 40% of the providers offering childcare are Childminders and 43% are Pre-schools, Day Nursery and Primary School Nursery, other provision is met largely by breakfast and holiday clubs. 97 % of funded providers are 'good/ outstanding'[59].

3.49 The Childcare Assessment Sufficiency Summary[60] sets out that in 2019 there was sufficient capacity for early years and childcare needs in Uttlesford, however the location of new development will determine whether there is capacity locally and whether expansion will be required.

Primary schools

3.50 Of the 41 schools located in Uttlesford, 37 are for infant or primary stage up to and including the school year when pupils turn 11.

3.51 ECC's 10 year plan[61] sets out that there is significant pressure on primary school places due to both new development and demographic pressures, where increasing numbers of births in recent years increases the need for pupil places. The plan sets out that new schools will be required at Saffron Walden (developer contributions have secured the site for this) and Great Dunmow (a new two-form entry school will be required). School expansion will also be required at Elsenham and Helena Romanes (Great Dunmow). It is important to note that the emerging local plan will increase the number of dwellings and new pupils within Uttlesford and therefore the amount of new school provision is likely to increase.

Secondary schools

3.52 The four secondary schools which provide for pupils aged between 11 and 18 are Helena Romanes School and Sixth Form Centre in Great Dunmow, Forest Hall School in Stansted Mountfitchet, Joyce Frankland Academy in Newport and Saffron Walden County High School in Saffron Walden.

3.53 The 10 year plan[62] sets out there are no planned increases to capacity in secondary schools, however new development coming forward in Bishop's Stortford may impact on place availability in Forest Hall School.

3.54 Additional development which comes through the emerging local plan is likely to increase the need for secondary place provision.

Post-16

3.55 Sixth Forms are linked to two of the secondary schools in the district including Saffron Walden High and Helena Romanes. Further education opportunities are also provided at Stansted Airport College, part of Harlow College. Further details in relation to capacity at these facilities will be included as the infrastructure planning work continues.

Special Educational Needs and Disabilities

3.56 ECC is also responsible for the providing facilities for children with special educational needs and disabilities (SEND). Provision for specific SEND requirements is made at Forest Hall and it is the aim of the education authority to ensure that SEND needs are catered for within each school where possible going forward.

Key delivery organisations

- ECC - Education

Funding

3.57 As outlined in the Essex Developers Guide (2020)[63], for Early Years, Childcare, Primary and Secondary, financial contributions will be required from sites with 20+ dwellings and land for new build where appropriate.

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[59] Essex County Council (2019) Childcare Sufficiency Assessment Summary [online]. Available at: https://assets.ctfassets.net/knkzaf64jx5x/7lKntMzJWxZ3OaA7QTLR54/d88f849526410eb4b17607c85b635e49/Early_Years_Sufficiency_Report_2019.pdf
[60] Essex County Council (2019) Childcare Sufficiency Assessment Summary [online]. Available at: https://assets.ctfassets.net/knkzaf64jx5x/7lKntMzJWxZ3OaA7QTLR54/d88f849526410eb4b17607c85b635e49/Early_Years_Sufficiency_Report_2019.pdf
[61] Essex County Council (2021) 10 Year Plan - Meeting the demand for school places in Essex 2021-2030 [online]. Available at: https://assets.ctfassets.net/knkzaf64jx5x/1sTwHeX9pKGl7ebfWZQ8yS/64c4aca7768117ae8a77fb0ba51fd260/ECC_10_year_plan_school_places_2021_2030.pdf
[62] Essex County Council (2021) 10 Year Plan - Meeting the demand for school places in Essex 2021-2030 [online]. Available at: https://assets.ctfassets.net/knkzaf64jx5x/1sTwHeX9pKGl7ebfWZQ8yS/64c4aca7768117ae8a77fb0ba51fd260/ECC_10_year_plan_school_places_2021_2030.pdf
[63] Essex County Council (2020) Essex County Council Developers' Guide to Infrastructure Contributions 2020 [online] Available at: https://www.essex.gov.uk/planning-advice-guidance/guidance-for-developers

3.58 For Post-16 provision, financial contributions will be required from sites of 20+ dwellings (the need in any area will be assessed on a case-by-case basis, so that contributions are only required where necessary).

Critical issues and implications

3.59 The following critical issues and implications arise as a result of the current provision, growth context, Covid-19, climate change and the ecological crisis.

3.60 Infrastructure providers have stated that Helena Romanes School in Great Dunmow is expected to relocate within the plan period but this is considered to be for operational reasons rather than due to a need to meet increased capacity. It is also understood that Saffron Walden High School is a relatively large school in the context of Essex schools, and the development strategy will need to be considered carefully as a significant expansion of this school may result in operational complexities due to its already large size.

3.61 With this in mind, it is important to note that provision of new secondary schools is more challenging than for primary schools due to the scale of population needed to support them, as such new secondary school provision is generally focussed on existing schools, unless there is a strategic opportunity to provide a new facility.

3.62 The distribution of pupils around the district results in some long journeys, and due to parental choice, ECC officers advise that some pupils living within the west of the district attend schools in Bishop Stortford, rather than Forest Hall School which does have some capacity.

3.63 Since the start of 2020 ECC has commissioned all school expansion projects to include renewable energy solutions as a contribution towards combatting climate change. This enhances already highly energy-efficient building specifications. ECC is actively investigating net-zero energy design for new school buildings to become the standard from 2022. This work complements a programme of energy efficiency upgrades and other works being planned for existing school buildings[64] .

Green infrastructure, open space and sports

Current context

Green infrastructure and open space

3.64 Green infrastructure is defined as a network of multi-functional green and blue spaces and other natural features, urban and rural, which is capable of delivering a wide range of environmental, economic, health and wellbeing benefits for nature, climate, local and wider communities and prosperity[65].

3.65 Reference to green infrastructure within this report includes elements which are also known as 'blue infrastructure', which are water based natural and semi-natural features such as rivers, streams, lakes, ponds and drainage systems.

3.66 The Essex Green Infrastructure Strategy[66] describes the need for green infrastructure in the county and sets a vision and objectives for the delivery of green infrastructure. Green infrastructure can be defined as a carefully planned network of high quality natural and semi-natural assets and habitat types, of green and blue spaces, and other strategically planned environmental features that maintain and delivers our ecosystem services. It provides multi-functional benefits integral to the health and wellbeing of communities, ecology and economy of the county[67].

3.67 There are 782 square kilometers of green infrastructure in Essex (21% of the total county area). 5.3% of the County is made up of woodland, while there are 4,058 miles of Public Rights of Way[68]. Uttlesford has the fourth largest amount of green space in the County with 79 green spaces. Natural and semi-natural open space makes up the largest type of green space in Uttlesford, followed by Ancient Woodland, Parks and Gardens, Greenways and outdoor sports facilities[69].

[64] Essex County Council (2021) 10 Year Plan - Meeting the demand for school places in Essex 2021-2030 [online]. Available at: https://assets.ctfassets.net/knkzaf64jx5x/1sTwHeX9pKGl7ebfWZQ8yS/64c4aca7768117ae8a77fb0ba51fd260/ECC_10_year_plan_school_places_2021_2030.pdf
[65] Ministry of Housing, Communities & Local Government (2021) National Planning Policy Framework 3 [online]. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1005759/NPPF_July_2021.pdf
[66] Essex County Council (2020) Essex Green Infrastructure Study [online] Available at: https://downloads.ctfassets.net/knkzaf64jx5x/35jhjEoQZAc4f7bwGyLa38/fc90fbc5519874490047930aae371036/Essex_Green_Infrastructure_strategy.pdf
[67] Essex County Council (2020) Essex Green Infrastructure Study [online] Available at: https://downloads.ctfassets.net/knkzaf64jx5x/35jhjEoQZAc4f7bwGyLa38/fc90fbc5519874490047930aae371036/Essex_Green_Infrastructure_strategy.pdf
[68] Essex County Council (2020) Essex Green Infrastructure Study [online] Available at: https://downloads.ctfassets.net/knkzaf64jx5x/35jhjEoQZAc4f7bwGyLa38/fc90fbc5519874490047930aae371036/Essex_Green_Infrastructure_strategy.pdf

[69] Essex County Council (2020) Essex Green Infrastructure Study [online] Available at: https://downloads.ctfassets.net/knkzaf64jx5x/35jhjEoQZAc4f7bwGyLa38/fc90fbc5519874490047930aae371036/Essex_Green_Infrastructure_strategy.pdf

3.68 Country parks are identified where they meet certain criteria for size and facilities provided. There are none in Uttlesford but there is provision at Great Notley and Flitch Way over the border in Braintree. Due to the large scale and attractive nature of these spaces they are understood to be used by residents in Uttlesford and are considered to be at capacity[70].

3.69 The Uttlesford Open Space Assessment Report and the accompanying Open Space Standards Report (both 2019) set out that there are a number of different open spaces in the district, falling into a number of typologies. More detail on these spaces is as follows:

- There are seven sites classified as parks and gardens in Uttlesford, equating to over nine hectares at a current provision of 0.1 hectares per 1,000 population[71]. This is below the Fields in Trust standard of 0.8 hectares per 1,000 population. Whilst 3 of 7 sites are considered low quality it is understood that there are no significant quality issues[72].
- There are 67 sites identified as natural and semi-natural greenspace in Uttlesford, equating to over 509 hectares at a current provision of 5.81 hectares per 1,000 population[73]. This is significantly above the Fields in Trust standard of 1.8 hectares per 1,000 population. Access by walking to such spaces is an issue for the district, in particular in settlements with a greater population density including Newport, Stansted Mountfitchet and Felsted. 71% are considered to be good value, including Hatfield Forest[74].
- There are 110 amenity greenspace sites in Uttlesford, equating to 140 hectares at a current provision of 1.6 hectares per 1,000 population[75]. This is above the Fields in Trust standard of 0.6 hectares per 1,000 population. 77% of sites are considered to be high quality[76].
- There are 73 sites in Uttlesford identified as provision for children and young people, equating to 8.99 hectares at a current provision of 0.1 hectares per 1,000 population[77]. This is below the Fields in Trust standard of 0.25 hectares per 1,000 population. 67% of sites are considered to be high quality[78].
- There are 27 sites classified as allotments in Uttlesford, equating to over 17 hectares at a current provision of 0.2 hectares per 1,000 population[79]. This is slightly below standards identified by the National Society of Allotment and Leisure Gardeners. 85% of sites are considered high quality[80].

[70] Essex County Council (2020) Essex Green Infrastructure Study [online] Available at: https://downloads.ctfassets.net/knkzaf64jx5x/35jhjEoQZAc4f7bwGyLa38/fc90fbc5519874490047930aae371036/Essex_Green_Infrastructure_strategy.pdf
[71] Uttlesford District Council (2019) Open Space Study Standards Paper [online]. Available at: https://www.uttlesford.gov.uk/media/9620/ED14C-Uttlesford-Open-Space-Standards-Paper/pdf/ED14C__Uttlesford_Open_Space_Standards_Paper.pdf?m=637472620477370000
[72] Uttlesford District Council (2019) Open Space Assessment Report [online]. Available at: https://www.uttlesford.gov.uk/media/9619/ED14B-Uttlesford-Open-Space-Assessment-Report/pdf/ED14B__Uttlesford_Open_Space_Assessment_Report.pdf?m=636969740431630000
[73] Uttlesford District Council (2019) Open Space Study Standards Paper [online]. Available at: https://www.uttlesford.gov.uk/media/9620/ED14C-Uttlesford-Open-Space-Standards-Paper/pdf/ED14C__Uttlesford_Open_Space_Standards_Paper.pdf?m=637472620477370000
[74] Uttlesford District Council (2019) Open Space Assessment Report [online]. Available at: https://www.uttlesford.gov.uk/media/9619/ED14B-Uttlesford-Open-Space-Assessment-Report/pdf/ED14B__Uttlesford_Open_Space_Assessment_Report.pdf?m=636969740431630000
[75] Uttlesford District Council (2019) Open Space Study Standards Paper [online]. Available at: https://www.uttlesford.gov.uk/media/9620/ED14C-Uttlesford-Open-Space-Standards-Paper/pdf/ED14C__Uttlesford_Open_Space_Standards_Paper.pdf?m=637472620477370000
[76] Uttlesford District Council (2019) Open Space Assessment Report [online]. Available at: https://www.uttlesford.gov.uk/media/9619/ED14B-Uttlesford-Open-Space-Assessment-Report/pdf/ED14B__Uttlesford_Open_Space_Assessment_Report.pdf?m=636969740431630000
[77] Uttlesford District Council (2019) Open Space Study Standards Paper [online]. Available at: https://www.uttlesford.gov.uk/media/9620/ED14C-Uttlesford-Open-Space-Standards-Paper/pdf/ED14C__Uttlesford_Open_Space_Standards_Paper.pdf?m=637472620477370000
[78] Uttlesford District Council (2019) Open Space Assessment Report [online]. Available at: https://www.uttlesford.gov.uk/media/9619/ED14B-Uttlesford-Open-Space-Assessment-Report/pdf/ED14B__Uttlesford_Open_Space_Assessment_Report.pdf?m=636969740431630000
[79] Uttlesford District Council (2019) Open Space Study Standards Paper [online]. Available at: https://www.uttlesford.gov.uk/media/9620/ED14C-Uttlesford-Open-Space-Standards-Paper/pdf/ED14C__Uttlesford_Open_Space_Standards_Paper.pdf?m=637472620477370000
[80] Uttlesford District Council (2019) Open Space Assessment Report [online]. Available at: https://www.uttlesford.gov.uk/media/9619/ED14B-Uttlesford-Open-Space-Assessment-Report/pdf/ED14B__Uttlesford_Open_Space_Assessment_Report.pdf?m=636969740431630000

3.70 Approximately 75% of these spaces are considered to be of high quality, but three of the seven parks and gardens are considered low quality[81].

3.71 The majority of individuals prefer to walk to access most types of provision, whilst others utilise private cars. There is generally very little use of cycling or public transport to access green infrastructure and open spaces[82].

3.72 Hatfield Forest is a key site in Uttlesford, as it accounts for 75% of the provision of natural and semi-natural green space[83]. It is understood to be under significant recreational pressure which has led to the conclusion that the Sites of Special Scientific Interest (SSSI) units here are in unfavourable condition[84]. Provision of additional green infrastructure and open space would help to relieve this.

3.73 Other ecologically important habitats in the district are considered to be under pressure include SSSIs at Ashdon Meadows, Debden Water & High Wood (Dunmow), which are all recorded as being in unfavourable condition[85]. A local wildlife site review is understood to be in progress and the findings from this will be fed into the future iterations of this report.

3.74 Rural communities are identified as being particularly affected by lack of public access to green infrastructure, including those in Uttlesford despite being in close proximity to more natural areas. This is reflected in Uttlesford, where over 40% of residents experience a green space deficiency in their local area[86].

Sports facilities

3.75 Local health indices are generally better than the national norms[87], underlining the importance of ensuring access to sports and recreation facilities, as part of a wider strategy to ensure that the local population remains physically active and increases its participation.

3.76 The Playing Pitch Strategy[88] identifies current levels of provision within Uttlesford across the public, education, voluntary and commercial sectors. Current levels of facilities supply in Uttlesford appear to be at a good level for the population served[89]. However, the high proportion of major built facilities on school sites limits access and means that the actual capacity to accommodate community use is much more limited. The amount of exported demand from Uttlesford also emphasises the lack of capacity in several types of facility including swimming pools. Whilst there is a very vibrant voluntary sports clubs sector locally, 90% of survey respondents identified that current facilities provision is inadequate to meet their needs.

3.77 There are six indoor sports halls in the district in the following locations:

- Great Dunmow: Great Dunmow Leisure Centre
- Newport: Joyce Frankland Academy
- Saffron Walden: County High Sports Centre, Friends School and Lord Butler Leisure Centre
- Stansted Mountfitchet: Mountfitchet Romeera Leisure Centre

3.78 There are four community accessible swimming pools located in Uttlesford at Friends School and Lord Butler Leisure Centre in Saffron Walden, Great Dunmow Leisure Centre, and Felsted School.

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[81] Uttlesford District Council (2019) Open Space Assessment Report [online]. Available at: https://www.uttlesford.gov.uk/media/9619/ED14B-Uttlesford-Open-Space-Assessment-Report/pdf/ED14B__Uttlesford_Open_Space_Assessment_Report.pdf?m=636969740431630000

[82] Uttlesford District Council (2019) Open Space Assessment Report [online]. Available at: https://www.uttlesford.gov.uk/media/9619/ED14B-Uttlesford-Open-Space-Assessment-Report/pdf/ED14B__Uttlesford_Open_Space_Assessment_Report.pdf?m=636969740431630000

[83] Uttlesford District Council (2019) Open Space Assessment Report [online]. Available at: https://www.uttlesford.gov.uk/media/9619/ED14B-Uttlesford-Open-Space-Assessment-Report/pdf/ED14B__Uttlesford_Open_Space_Assessment_Report.pdf?m=636969740431630000

[84] Natural England (2019) New Evidence and Advice on Recreational Disturbance Impacts... [online]. Available at: https://www.harlow.gov.uk/sites/default/files/documents/EX0057%20-%20Natural%20England%20Hatfield%20Forest%20SSSI%20NNR%20Updated%20Interim%20Advice%20Letter.pdf

[85] Natural England (2021) Designated Sites View [online]. Available at: https://designatedsites.naturalengland.org.uk/SiteList.aspx?siteName=&countyCode=15&responsiblePerson=&DesignationType=All

[86] Essex County Council (2020) Essex Green Infrastructure Study [online] Available at: https://downloads.ctfassets.net/knkzaf64jx5x/35jhjEoQZAc4f7bwGyLa38/fc90fbc5519874490047930aae371036/Essex_Green_Infrastructure_strategy.pdf

[87] Uttlesford District Council (2019) Open Space Standards [online] Available at: https://www.uttlesford.gov.uk/media/9620/ED14C-Uttlesford-Open-Space-Standards-Paper/pdf/ED14C__Uttlesford_Open_Space_Standards_Paper.pdf?m=637472620477370000

[88] Uttlesford District Council (2019) Open Space Standards [online] Available at: https://www.uttlesford.gov.uk/media/9620/ED14C-Uttlesford-Open-Space-Standards-Paper/pdf/ED14C__Uttlesford_Open_Space_Standards_Paper.pdf?m=637472620477370000

[89] Uttlesford District Council (2016) Sports Facilities Development Strategy [online] Available at: https://www.uttlesford.gov.uk/media/5608/Sports-Facilities-Development-Strategy-January-2016/pdf/Sports_Facilities_Development_Strategy_January_2016.pdf?m=635913231609400000

3.79 There are a total of 168 grass playing pitches in Uttlesford for a wide range of sports, as well as ten artificial pitches of which six are in public use. The majority of these are located in Saffron Walden.

3.80 For most types of facility, according to the 2016 sports facilities development strategy, existing provision is broadly adequate to meet current needs, with the following exceptions[90] :

- Swimming - There is a shortage of water space equivalent to two lanes of a 25m pool;
- Athletics - There is emerging demand for specialist facilities in the north of the district;
- BMX race tracks - Unmet demand for one track;
- Adult football pitches - There is a deficit equivalent to one pitch;
- Youth football pitches - There is a deficit equivalent to six pitches;
- Rugby pitches - There is a deficit equivalent to two pitches ;
- Synthetic turf pitches for hockey - Unmet demand equates to one pitch;
- '3G' football turf pitches - There is a deficit equivalent to three pitches;
- Disabled access - Disabled access is poor at a number of facilities;
- Changing facilities - Changing provision is poor at some sites particularly at pitches.

Key delivery organisations

Green infrastructure and open space

- Essex Wildlife Trust;
- Environment Agency;
- Natural England;
- ECC - GI Team;
- Sport England;
- RSPB.

Sports

- Uttlesford District Council;
- Private sports providers.

Funding

3.81 Funding for green infrastructure open space and sports facilities is very limited. New provision is largely dependent upon council budgets, local communities and developer contributions, although given sufficient organisation and justification, other grant funding, such as from the Heritage Lottery, is also available.

3.82 Maintenance of green infrastructure is a key issue as this is generally dependent upon council budgets which are facing significant pressures, however there is an opportunity for new provision to be maintained using stewardship models within large extensions and new communities.

Critical issues and implications

3.83 A critical issue for green infrastructure and open space is that there is no single organisation with a statutory duty for these to be provided or maintained. As such it can be challenging to leverage funding for these spaces.

3.84 In order to reverse ecological declines, it will be vital for more green infrastructure to be provided within new developments - the requirements for biodiversity net gain which are already required by the NPPF and are set to rise to 10% following the enactment of the Environment Bill are also likely to result in increased provision of more green infrastructure than would otherwise have been the case. However it will also be important for more green space to be provided in accordance with the Lawton Principles of bigger, better and more joined up[91].

Health and Wellbeing

Current context

Primary Care (GP) Services

3.85 The provision of GP Surgeries in Uttlesford is managed by the NHS West Essex Clinical Commissioning Group (CCG). GP surgeries in Uttlesford are located in:

- Elsenham: Elsenham Surgery;

[90] Uttlesford District Council (2016) Sports Facilities Development Strategy [online] Available at: https://www.uttlesford.gov.uk/media/5608/Sports-Facilities-Development-Strategy-January-2016/pdf/Sports_Facilities_Development_Strategy_January_2016.pdf?m=635913231609400000

[91] HM Government (2010) Making Space for Nature [online]. Available at: https://www.gov.uk/government/news/making-space-for-nature-a-review-of-englands-wildlife-sites-published-today

- Great Dunmow: Angel Lane Surgery and John Tasker House Surgery;
- Hatfield Heath: Eden Surgery;
- Newport: Newport Surgery;
- Saffron Walden: The Gold St Surgery and Crocus Medical Practice;
- Stansted Mountfitchet: Stansted Surgery;
- Thaxted: Thaxted Surgery.

3.86 Primary care is provided over two administrative areas – Uttlesford North and Uttlesford South. Information provided by the NHS sets out that capacity in Uttlesford North is able to serve the current population due to recent improvements at Crocus Surgery and Thaxted but will not be able to accommodate additional growth without further improvements/expansion. Capacity in Uttlesford South is significantly constrained and not able to meet the current population. This is being remedied by construction of a new surgery in Felsted to replace the current one, and utilisation of Dunmow Community Clinic for primary care. These new improvements are not designed to accommodate additional growth which comes through the emerging local plan[92], and as such further improvement/expansion may be necessary once growth levels are identified in this area.

Hospitals

3.87 Healthcare provided by the NHS in Uttlesford comes under the Hertfordshire and West Essex sustainability and transformation partnership[93].

3.88 The only hospital located in Uttlesford is Saffron Walden Community Hospital, which is managed by the Cambridge University Hospitals NHS Foundation Trust. There are, however, a number of hospitals located in neighbouring districts which serve Uttlesford residents in the following locations:

- Bishop's Stortford: Herts and Essex Community Hospital;
- Cambridge: Addenbrooke's Hospital and Fulbourn Hospital;
- Braintree: Braintree Community Hospital, St Michael's Hospital, and William Julien Courtauld Hospital; Halstead Hospital.

3.89 GP services and hospitals will need to reconfigure their care infrastructure to cope with an ageing population and to centralise support functions and services.

Dentists

3.90 There are 16 dentists (NHS and private) in Uttlesford, located in Saffron Walden, Great Dunmow, Stansted Mountfitchet, Takeley and Thaxted.

Social care

3.91 Social care for both adults and children is provided by ECC who also have responsibility for making specific provision of built infrastructure for care services such as extra care. The ECC Organisation Plan[94] sets out that in 2021 ECC worked with L&Q living to open Cornell Court in Saffron Waldon, enabling older people who need to care to live independently in high quality modern facilities. The plan sets out the ambition to move to a more community-based model of social care and to increase accommodation options that promote independence including the development of Extra Care Housing for older people, Supported Living options for people with learning disability and autism, and improved accommodation options for people with mental health issues.

Mental Health

3.92 Residents of Uttlesford are able to access mental health services through a referral from their GP[95]. The Essex Partnership University NHS Foundation Trust (EPUT) provides a range of mental health support services within Uttlesford and neighbouring districts, enabling residents to be treated by community and inpatient mental health team.

3.93 Self-referral talking therapies are provided through the NHS West Essex Clinical Commissioning Group.

Homelessness

3.94 The Homelessness Strategy[96] sets out the context of homelessness both nationally and locally and reviews the

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[92] Based on discussions with the West Essex Clinical Commissioning Group September 2021.
[93] Essex County Council (2019) Developer's guide to developer contributions [online]. Available at: https://consultations.essex.gov.uk/rci/ecc-developers-infrastructure-contributions/supporting_documents/Developers%20Guide.pdf
[94] Essex County Council (2021) Organisation Plan 2021/22 [online]. Available at: https://assets.ctfassets.net/knkzaf64jx5x/4TKONb4gRP0M8pATtGptht/d5f299102cf59cb3f224d8e9bc3e440e/ECC_Organisation_Plan_2021_to_2022.pdf
[95] NHS (no date) Essex Partnership University NHS Foundation Trust [online] Available at: https://www.nhs.uk/Services/Trusts/Services/DefaultView.aspx?id=R1L
[96] Uttlesford District Council (2020) Homelessness Strategy and Review [online] Available at: https://www.uttlesford.gov.uk/media/10024/Homelessness-and-Rough-Sleeping-Strategy-2020-2025/pdf/Homelessness_and_Rough_Sleeping_Strategy_2020_-2025.pdf?m=637147576757230000

levels of homelessness within the district. Homelessness has increased within Uttlesford, as it has nationally, over the past 4 years. The principal services to assist in preventing homelessness and rough sleeping in Uttlesford are:

- Young person homelessness support services from ECC. This includes working to the Essex wide Joint Protocol on 16/17 year olds;
- Floating Support Services from Peabody;
- Domestic Abuse services from Next Chapter;
- Tenancy management for council and RSL stock;
- Housing Benefit Visiting Officer/ Welfare Officer;
- DWP support;
- Probation/Community Rehabilitation Company – Including Essex Prison Release Housing Protocol;
- ECC Adult AND Children Services;
- Community Mental Health Services;
- Addiction Services – Open Road and ADAS;
- Bromfield House Supported Housing Scheme;
- Railway Meadow Mother and Baby Unit – nomination rights to 4 bed spaces;

3.95 There are also independent voluntary sector services within Uttlesford, some that receive council grant funding that also support council officers in their work on preventing and relieving homelessness.

Key delivery organisations

- Hertfordshire and West Essex Integrated Care Systems (ICS);
- NHS West Essex CCG;
- NHS Property;
- Mental Health Services;
- ECC – Public Health;
- Addenbrookes Hospital;
- Rural Community Councils Essex.

Funding

3.96 Funding for GPs currently comes from the Improvement Grant – a nationally allocated grant based on evidence of need submitted by GPs. This covers 66% of the cost of the improvements, with the GPs having to resource the remainder from their own funds or fundraising. Developer contributions can be used where these are justified, for example where large scale new development is being provided such as a new town.

3.97 Funding for hospitals and mental health services is allocated on a national basis by the NHS.

3.98 Funding for dentists is generally private, with support from the NHS.

3.99 Funding to help address homelessness largely comes from Uttlesford District Council as well as charities and voluntary organisations.

Critical issues and implications

3.100 Information collected via infrastructure provider engagement to inform this report identified that GP practices within the District are largely at capacity already, but that hospital capacity is however stable at this time.

3.101 Further population growth is likely to have an impact on future primary healthcare service provision. Services are also understood to be under pressure from cross border leakage, particularly in the East of District. GP services and hospitals will need to reconfigure their care infrastructure to cope with an ageing population and to centralise support functions and services. There is an overall capacity deficit of social care services throughout the district, due to population growth and from the removal of the proposed garden communities (which were in the previous draft local plan) which would have provided a health package as part of the infrastructure[97].

3.102 Future iterations of the IDP will be informed by continuing discussions with the CCG and other healthcare providers (such as Hospital trusts) to ensure proposed growth is accounted for.

3.103 Health and social care commissioning across Uttlesford is due to be reformed through the integration of different elements of the health service into Integrated Care Systems (ICSs). This is expected from around 2022 onwards.

3.104 Emerging technologies to enable people to access healthcare via the internet such as virtual consultations and healthcare monitoring is likely to help free up capacity over the plan period, however the amount of capacity this will provide is unclear at present[98].

[97] Based on discussion held during the first infrastructure stakeholder / provider workshop
[98] Nuffield Health (2020) The impact of Covid-19 on the use of digital technology in the NHS [online]. Available at: https://www.nuffieldtrust.org.uk/files/2020-08/the-impact-of-covid-19-on-the-use-of-digital-technology-in-the-nhs-web-2.pdf

Utilities

Current context

Water supply

3.105 Affinity Water is responsible for providing the district with fresh drinking water. This is provided from a combination of groundwater and surface water abstractions, some of which are outside the District, allowing additional water to be transferred into the District to accommodate future growth.

3.106 According to the 2009 District Water Cycle Study[99], the District is partly underlain by a chalk aquifer of regional importance. The Environment Agency (EA) currently class the surface water and groundwater resources within the District as over-licensed or over-abstracted, meaning that there is no additional water available for supply.

3.107 The Affinity Water Management Plan[100] outlines the plans to provide a reliable, resilient, efficient and affordable water supply to customers from 2020 to 2080, whilst protecting the environment. At the core of this strategy is the need to balance the amount of water available for supply with the demand for water.

3.108 Anglian Water supply a large extant of the area surrounding Uttlesford, so are relevant in this context. The Anglian Water Resources Management Plan[101] sets out the strategy for managing the water supplies in the region to meet current and future needs over a minimum period of 25 years. Affinity Water and Anglian Water have agreements over the transfer of water supply between the two companies.

3.109 In previous years, Affinity and Anglian Water have identified that a significant shortfall of water is likely to arise in their respective areas, including Uttlesford. The proposed solution to this is the construction of a new reservoir in Lincolnshire known as the South Lincolnshire reservoir. Water will be transported from here into the southeast of England, helping to boost supplies. This project is at an early stage and is yet to secure the necessary consents. As a large infrastructure project the relevant regime will be the nationally significant infrastructure projects determination process, under the provision of the Planning Act 2008. At present, construction of the reservoir is planned for 2027, and it is anticipated to be ready to supply water by 2035[102].

3.110 In addition to the above, Anglian Water has submitted a planning application for a large pipeline to provide water to the east of England, specifically the areas it serves surrounding Uttlesford including Cambridgeshire[103]. This is part of a programme of constructing several 500km of new pipeline from Elsham in Lincolnshire to Colchester, including links to supply Uttlesford[104]. The Bexwell to Bury section would be operational by 2025. The new pipeline infrastructure would eventually link Uttlesford to the South Lincolnshire reservoir .

Water treatment

3.111 Wastewater services are currently split between Anglian Water and Thames Water, with Anglian operating in the north east of the district and Thames Water operating in the south-west. The Anglian Water Integrated Plan[105] sets out the key issues arising in relation to the treatment of water. These include increased water usage per capita as more people are working from home during the pandemic and a higher number of pollution incidents than government targets provide for. The high number of pollution incidents reflects the ageing infrastructure in place and the company's pollution incident reduction plan sets out significant ambitions to improve infrastructure to reduce leaks. A pollution incident task force has been set up to specifically address this issue[106].

3.112 The Braintree, Rayne and Bocking water recycling centres managed by Anglian Water are located outside the boundary of Uttlesford but have catchment areas within the District.

3.113 The Environment Agency have overall responsibility for setting limits monitoring and regulating discharges to watercourses from water recycling centres (WRCs).

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[99] Uttlesford District Council (2009) Uttlesford District Water Cycle Study [online] Available at: http://www.saveourvillage.co.uk/Documents/Water%20Cycle%20Study%20High%20Level%20Summary.pdf
[100] Affinity Water (2020) Water Management Plan [online] Available at: https://www.affinitywater.co.uk/docs/Affinity_Water_Final_WRMP19_April_2020.pdf
[101] Anglian Water (2020) Water Resources Management Plan [online] Available at: https://www.anglianwater.co.uk/about-us/our-strategies-and-plans/water-resources-management-plan/
[102] Anglian Water and Affinity Water (2021) Strategic Solution Gate One Submission: Preliminary Feasibility Assessment South Lincolnshire Reservoir [online]. Available at: https://www.anglianwater.co.uk/siteassets/household/about-us/strategic-solution-gate-one-submission-preliminary-feasibility-assessment-south-lincolnshire.pdf
[103] Anglian Water (2021) Anglian Water submits planning applications for new pipeline to keep taps running in the East [online]. Available at: https://www.anglianwater.co.uk/news/bexwell-to-bury-pipeline/
[104] Anglian Water (2019) New water pipelines [online]. Available at: https://www.anglianwater.co.uk/about-us/our-strategies-and-plans/new-water-pipelines/
[105] Anglian Water (2021) Annual Integrated Plan [online]. Available at: https://www.anglianwater.co.uk/siteassets/household/about-us/air-2021.pdf.pdf
[106] Anglian Water (2020) Anglian Water's Pollution Incident Reduction Plan [online]. Available at: https://www.anglianwater.co.uk/contentassets/0e50eef7ef2a4630b31220d3351193d7/pollution-incident-reduction-plan-2020-2025.pdf

3.114 The Thames Water drainage and wastewater management plan portal[107] sets out that the area of Uttlesford served by Thames Water is at very significant risk of pollution incidents and sewer collapses. The portal also identifies that predicted STW compliance in 2050 is at risk of not meeting requirements. Thames Water are in the process of identifying potential options to resolve these issues, and a report is expected in late 2021[108].

Electricity

3.115 Electricity is distributed nationally by National Grid through high voltage transmission lines and infrastructure (at 275 and 400 kilovolts [kV]). Local electricity distributors distribute from national grid infrastructure to properties using lower voltage lines (typically 33kV overhead or 11kV underground). Electricity in Uttlesford is distributed by UK Power Networks.

3.116 Uttlesford is served one national grid sub-station at Pelham, and by three 132/33kV local grid substations, located in Bishop's Stortford, Braintree and Thaxted. From these, further transmission infrastructure and a further ten substations distribute electricity to premises.

3.117 It is important to note that the substations at Bishop's Stortford and Braintree are shared assets, and so the capacity of these will depend on growth in adjacent areas.

Gas

3.118 National Grid distributes gas around the UK at high pressure. This is distributed on a local basis by eight different distribution networks, some of which are owned by National Grid. Uttlesford is served by National Grid Gas Distribution Ltd. There is one strategic gas pipeline route that runs through Uttlesford which is owned and operated by National Grid. Due to the rural nature of Uttlesford, many properties are not connected to the gas network.

Broadband and telecoms

3.119 High speed internet is provided either through cables or masts (for example mobile phone masts). Telecoms provided through cables are defined as 'fixed' telecoms whilst the network of transceivers mounted on masts or tall buildings is often categorised as 'mobile' telecoms.

3.120 Fixed telecoms are provided by commercial suppliers, in Uttlesford these include OpenReach, Gigaclear and Virgin Media O2, and there will also be other commercial operators. These companies supply individual premises with connections however due to legacy issues relating to the infrastructure which is already in place and when this installed data speeds can often be lower in some areas than others.

3.121 According to September 2020 data from Ofcom for fixed infrastructure telecoms, connectivity is relatively poor across Uttlesford[109], with 87.5 of properties having access to superfast broadband (download speed of 25 megabits per second [Mbps] or more), with the national average for district and unitary authorities being 94%. 37.9% of properties are able to access ultrafast broadband (100Mbps or more) which is again lower than the national average for district and unitary authorities, which is 54%. 19.1% of premises can access 1 gigabit per second speeds (a gigabit is 1000 megabits), this is below the national average for district and unitary authorities which is 21.5%. Furthermore, OFCOM estimates that 1.6% of premises in Uttlesford do not meet the Universal Service Obligation (USO), which requires speeds of at least 10Mbps download and 1Mbps upload. The average for district and unitary authorities is 0.7%. Overall, the picture is that a relatively high proportion of Uttlesford residents do not have access to internet speeds which are needed to meet an average household's digital needs[110], and that internet speeds across the district are below average.

3.122 According to recent Ofcom data[111], Saffron Walden has some of the best broadband coverage in Uttlesford whereas smaller rural settlements and households have some of the poorest coverage. Great Dunmow, Stansted Mountfitchet and Elsenham have reasonably good coverage.

3.123 The Superfast Essex Programme, managed by Essex Superfast Broadband, aims to extend superfast broadband coverage where possible to 97% of the County by 2020. This work is being undertaken by Gigaclear. Although the commitment was for this to be complete by 2020, the latest

[107] Thames Water (no date) Drainage and Wastewater Management Plan Portal [online]. Available at: https://storymaps.arcgis.com/stories/201050209c7a4658a1c2265aa4411375

[108] Thames Water (2021) Shaping our wastewater future The approach we've taken to create collaborative planning objectives for our first Drainage and Wastewater Management Plan (DWMP) [online]. Available at: https://www.thameswater.co.uk/media-library/home/about-us/regulation/drainage-and-wastewater/strategic-context-document.pdf

[109] OFCOM (2020) Data Downloads [online]. Available at: https://www.ofcom.org.uk/research-and-data/multi-sector-research/infrastructure-research/connected-nations-2020/data-downloads

[110] BT (no date) About broadband universal service [online]. Available at: https://www.bt.com/broadband/USO

[111] Ofcom (2017) Broadband Download Average Speed 2017.

programme indicates that this work is still ongoing and is mostly likely to be completed by December 2021[112].

3.124 The UK Telecoms Infrastructure Review was published in 2018[113]. It sets out the Government's ambition to roll out full fibre connections to all premises by 2033. This can provide speeds of up to 1 gigabit per second. Between March 2020 and March 2021, gigabit connectivity increased from 9% of UK premises to 39%. In accordance with their ambitions, the government has announced £5 million of funding for project gigabit – a project to help deliver gigabit speed internet to 510,000 premises, beginning in 2022. One of the areas covered is Essex. There is also anticipated to be further funding available for gigabit speed internet delivery in Essex as part of this project, but details have not yet been released[114].

3.125 Generally, new developments are expected to include superfast broadband connections to all new premises[115]. Although this is more problematic for smaller developments (generally fewer than 25 homes) because installation tends to be more expensive.

Delivery organisations

Water supply and waste water treatment

- Affinity Water
- Thames Water
- Anglian Water

Electricity and Gas

- National Grid
- UK Power Networks

Telecoms

- Gigaclear
- BT Openreach
- Virgin Media O2
- Essex Superfast Broadband

Funding

Water supply and waste water treatment

3.126 Funding for water supply and water treatment processes comes generally from the commercial operations of the relevant water companies. Where new development comes forward the expectation is that the development will provide for the cost of new infrastructure[116].

Electricity and Gas

3.127 Funding for electricity and gas infrastructure comes generally from the commercial operations of the relevant companies and from government funding for major upgrades. Where new development comes forward the expectation is that the development will provide for the cost of new infrastructure[117,118].

Telecoms

3.128 Funding for Telecoms generally comes from the commercial operations of the relevant companies, although national and local government funding is also used to deliver services which are less viable to reach (such as the Superfast Essex programme).

3.129 Where new connections are needed as a result of development, a connection charge is usually applied. These are different across the service providers.

Critical issues and implications

Water supply and waste water treatment

3.130 The key issue in relation to water supply is the over-abstraction of ground and surface water which already occurs. This is resulting in negative effects on chalk streams in the district and surrounding area, which are environmentally diverse features. The Environment Agency is undertaking a review of abstraction licences across the country in order to

[112] Superfast Essex (no date) Our work with Gigaclear [online]. Available at: https://www.superfastessex.org/get-connected/our-work/gigaclear/
[113] HM Government (2018) UK Telecoms Infrastructure Review [online]. Available at: https://www.gov.uk/government/publications/future-telecoms-infrastructure-review
[114] HM Government (2021) Press release: Government launches new £5bn 'Project Gigabit' [online]. Available at: https://www.gov.uk/government/news/government-launches-new-5bn-project-gigabit
[115] HM Government (2020) Press release: New-build homes to come gigabit-speed ready [online]. Available at: https://www.gov.uk/government/news/new-build-homes-to-come-gigabit-speed-ready
[116] Affinity Water (no date) Charging Arrangements for New Connections Services 2019 /2020 [online]. Available at: https://www.affinitywater.co.uk/docs/developer/201920/Final-New-Connections-Charging-Arrangments-2020-2021.pdf
[117] UK Power Networks (no date) Connect a new electricity supply [online]. Available from: https://www.ukpowernetworks.co.uk/electricity/new-connection
[118] National Grid (2021) Applying for a new connection [online]. Available at: https://www.nationalgrid.com/uk/gas-transmission/connections/applying-connection

help address these issues[119]. Whilst the water company plan sets out that the district can be supplied by bringing in water from elsewhere, this is partly dependent on abstractions in surrounding districts, many of which are facing the same issue, or upon infrastructure which does not yet have consent and will not be available for 15 years. Further discussions will be held with the water companies to ensure that long term supplies, during and beyond the plan period, are robust.

3.131 In terms of treatment, the key issue is the reduction of pollution events, which the relevant water companies are already taking action upon. The proposed development locations will need to be tested to ascertain the potential impact on water supply and treatment infrastructure.

Electricity and Gas

3.132 There are a number of pressures on the electricity infrastructure arising from the presence of more and smaller generating stations, such as solar farms and even micro-generation on homes and other premises. As such , electricity distributors are already investing in more dynamic grid infrastructure to account for this.

3.133 Another key issue will be the anticipated move away from gas as an energy source, which is likely to result in increased demands on the electricity network. The implications of increased home working arising from the Covid-19 pandemic are also likely to result in more resources being utilised than previously.

3.134 Electric vehicles are likely to result in greater demand for electricity, smart charging will be vital to ensure that such peaks are reduced but it is still anticipated that the demand for electricity will increase[120].

3.135 Gas use is expected to decline in Uttlesford, as with the rest of the UK as consumers transition to more sustainable forms of energy. The UK Government considers that hydrogen may be a replacement for gas, and has set out its hydrogen strategy. The key implications of this for Uttlesford are to ensure that 'hydrogen ready' technology is used where new or replacement equipment such as boilers are installed, potentially by 2026. In future the current gas transmission network may be used for Hydrogen, but changes are likely to be required before this can occur. The timescales for this are unclear.

Telecoms

3.136 Higher speed telecoms are essential in helping to address the key issues of climate change by offering people the opportunity access services and employment from home, and also to make sure that businesses in Uttlesford can reach a wide clientele and engage in global collaboration.

3.137 The rural nature of Uttlesford, which results in a dispersed settlement pattern creates difficulties to delivering high speed internet to commercial operators whilst some government funding is being leveraged by Superfast Essex, the more funding, and the faster the rollout of higher speeds can progress, the better.

Waste management

Current context

3.138 The Joint Waste Planning Authority responsible for waste in Uttlesford is ECC. Of the 21 major public-facing recycling centres for household waste in Essex, Saffron Walden Recycling Centre is the only one located in Uttlesford. According to information gathered during infrastructure provider workshops, this is understood to be operating at or very near to capacity.

3.139 There are also approximately 22 smaller and local sites in Uttlesford where residents can take recyclable textiles and glass.

3.140 The one municipal waste transfer station in Uttlesford is located in Great Dunmow and is safeguarded as integral to managing household waste sustainably. Furthermore Cordons Farm at Long Green in Braintree also takes waste arising in Uttlesford.

3.141 Waste recycling centre sites located outside of the plan area in Braintree, Chelmsford, Mountnessing and Harlow are used by residents of Uttlesford. These are also understood to be operating at or near capacity. As such, housing growth in the District will need to be accompanied by expansion of existing and delivery of new waste infrastructure.

3.142 The waste local plan[121] sets out that in order to ensure there is sufficient waste capacity in the waste local plan area, a number of new waste facilities will be required. These will not be facilities open to the public such as recycling centres, but rather for the transfer, processing or disposal of waste. Strategic allocations for new waste management facilities

[119] Hm Government (2021) Policy Paper: Water Abstraction Plan: Environment [online]. Available at: https://www.gov.uk/government/publications/water-abstraction-plan-2017/water-abstraction-plan-environment
[120] National Grid (2021) Future energy Scenarios [online]. Available at: https://www.nationalgrideso.com/document/199871/download
[121] Essex County Council and Southend-on-Sea Borough Council (2017) Essex and Southend-on-Sea Waste Local Plan [online]. Available at: https://assets.ctfassets.net/knkzaf64jx5x/5MMZ5nNFmOClpF56igb0Jc/e6f7ab4cba4ed1198c67b87be7b375e7/waste-local-plan-2017-compressed.pdf

have been identified at Elsenham, Crumps Farm, Great and Little Canfield, Newport Quarry and Little Bullocks Farm, Great and Little Canfield.

Delivery organisations

3.143ECC - Waste Planning Authority

Funding

3.144 Waste management is generally undertaken by commercial companies. However, some waste management facilities are provided by ECC, and collection by Uttlesford District Council. These facilities are dependent on council funding[122].

Critical issues and implications

3.145 The capacity of waste recycling centres is likely to be the key issue in terms of waste management, and the expansion of recycling centre facilities to accommodate the demands of new housing in Uttlesford should be considered.

Flooding and drainage

Current context

3.146 The responsibility for flood risk management and drainage is shared between ECC, the Environment Agency and waste water treatment companies. As lead local flood authority (LLFA), ECC is responsible for coordinating the management of flood risk across Uttlesford from flood sources arising from surface water, ground water and ordinary watercourses. The Environment Agency has a responsibility for the main rivers that are situated within the district, as well as responsibility for maintaining and managing flooding from these rivers. Anglian Water and Thames Water are responsible for addressing flooding impacts from the sewerage system.

3.147 The district is located in the headwaters of the Thames and Anglian River Basin Districts (RBDs). In the Thames RBD, the Lee Upper Catchment and Roding Beam and Ingrebourne Catchment are located in Uttlesford. From the Anglian RBD, the Cam and Ely Ouse Catchment and Essex Combined Catchment are located in Uttlesford.

3.148 The strategic flood risk assessment carried out to support the previous local plan preparation[123] sets out that many settlements have experienced flooding in the past. Flood risk is exacerbated by poor management of drains and culverts but the greatest risk from flooding results from ordinary watercourses and surface water. The assessment strongly promoted sustainable urban drainage solutions (SuDS) in order to help address flood risk impacts.

3.149 The Local Flood Risk Management Strategy[124] sets out ECC's aims and actions to reduce the impact of local flooding to local communities which include mapping local routes for water and building flood defences.

3.150 In 2020, ECC released the Sustainable Drainage Systems Design Guide[125] which provides a set of standards for developers, designers and consultants who are seeking guidance on the LLFAs standards for the design of sustainable surface water drainage in Essex. It provides guidance on the planning, design and delivery of attractive and high-quality SuDS schemes which should offer multiple benefits to the environment and community.

3.151 As set out in the Waste Water section above, both Thames Water and Anglian Water have recorded pollution incidents (i.e. localised flooding) on their networks which number above the Environment Agency standards. Both organisations have set out ambitions to improve infrastructure in order to significantly limit these pollution incidents.

Delivery organisations

- ECC – Lead Local Flood Authority
- Environment Agency
- Anglian Water
- Thames Water

Funding

3.152 Funding for flood risk management schemes comes from either environment agency or ECC budgets. Where large or strategic schemes are required, government funding can

[122] Uttlesford District Council (2021) General Fund and Council Tax – 2021/22 Appendix H [online]. Available at: https://uttlesford.moderngov.co.uk/documents/s22559/Appendix%20H%20-%20General%20Fund%20and%20Council%20Tax.pdf
[123] JBA Consulting (2016) Uttlesford Strategic Flood Risk Assessment Final Report [online]. Available at: https://www.uttlesford.gov.uk/media/5545/Uttlesford-Strategic-Flood-Risk-Assessment-May-2016/pdf/2015s2938_-_Uttlesford_SFRA_v3.0.pdf?m=636005689900470000 and https://www.uttlesford.gov.uk/media/5546/Uttlesford-Strategic-Flood-Risk-Assessment-Maps-May-2016/pdf/Uttlesford_SFRA_v2.0_2015s2938_MAPS.pdf?m=636005694897670000
[124] Essex County Council (no date) Local Flood Risk Management Strategy [online] Available at: https://www.flood.essex.gov.uk/media/1293/essex-local-flood-risk-management-strategy.pdf
[125] Essex County Council (2020) Sustainable Drainage Systems Design Guide [online] Available at: https://www.essexdesignguide.co.uk/pdf/SuDS_Design_Guide_2020.pdf

also be collected. If new development will benefit from such a scheme, developer contributions may also be collected towards it.

3.153 In accordance with the NPPF, developments must mitigate flood risk within their site and ensure that flooding is not worsened for surrounding areas.

Critical issues and implications

3.154 Climate change is anticipated to worsen storm events and this is likely to result in more flooding events, and potentially at deeper depths. The strategic flood risk assessment will need to take into account the implications of climate change in its modelling (this is standard practice as set out in relevant guidance).

3.155 Provision of SuDS within new development has the potential to provide ecological habitat, thereby helping to address flood risk and ecological issues.

Community

Overview

3.156 Community can be hard to define and prescribe in terms of infrastructure planning. Whilst planning can provide spaces for community and local culture to develop and be experienced, there are several other mechanisms which must come forward to ensure an area owns, explores and expresses its own community identity. This section explores the areas where infrastructure planning can make a difference, considering community centres and youth facilities, libraries and other venues for music, art and culture.

3.157A Culture, Creativity & Arts baseline assessment is currently being undertaken and will be taken into account in future versions of the IDP.

Current context

Community centres and youth spaces

3.158 The Uttlesford Sports Development Strategy[126] sets out that there are currently 54 community centres in Uttlesford, equivalent to one per 1,471 persons. The whole population of Uttlesford is within a 10-minute drive of their most local hall. The strategy identifies no strategic need for additional provision, however this will be reviewed as the emerging local plan develops as set out above a baseline assessment of culture, creativity and the arts is being undertaken and will feed into future iterations of the IDP.

Libraries

3.159 The Library Service is statutory (1964 Public Libraries & Museums Act) and is required to provide a comprehensive and efficient service for all persons living, working and studying in Essex. Library services in Uttlesford are provided by ECC and there are currently four public libraries in the District. Stansted Mountfitchet, Great Dunmow, Saffron Walden and Thaxted all provide a full-time service.

3.160A mobile library and home library service is also in operation which visits a range of settlements throughout Uttlesford fortnightly and provides a service for those who cannot access the four public libraries.

3.161 The ECC Future Libraries work[127] sets out that the use of libraries in Essex has declined significantly and that there are significant funding shortfalls which result in the need for a review of library property. The strategy sets out that most libraries will not be provided in their current buildings, but rather will be located in buildings which share other services, by 2024.

3.162 The strategy identifies three different 'tiers' of library – tier 1 are 'hub' libraries which will be the best resourced and managed by ECC. In Uttlesford, this includes the library at Saffron Walden only. Tier 2 libraries will be managed by ECC. In Uttlesford, these include library provision at Great Dunmow. The Strategy sets out that libraries at Stansted Mountfitchet and Thaxted are considered tier 4 will be closed.

Delivery organisations

3.163 Buildings which provide for community uses are managed by several different stakeholders, including Uttlesford District Council, Essex County Council and parish and town councils. This requires partnership working in order to ensure community services are provided in an efficient and integrated way.

Funding

3.164 Funding for community centres arises from the commercial activities of the individual building, but are usually supported by additional funding from local government and other grants from charitable organisations such as the National Lottery. Developer contributions may be collected

[126] Ploszajski Lynch Consulting Ltd (2016) Sports Facilities Development Strategy [online]. Available at: https://www.uttlesford.gov.uk/media/5608/Sports-Facilities-Development-Strategy-January-2016/pdf/Sports_Facilities_Development_Strategy_January_2016.pdf?m=635913231609400000

[127] ECC (2019Essex Future Library Services Consultation summary and survey form [online]. Available at: https://libraries.essex.gov.uk/media/1015667/draft-essex-library-services-strategy-summary.pdf

where new development is likely to increase demand on new existing facilities and where large scale development is coming forward it is assumed that community provision would be provided by that development.

3.165 Funding for youth facilities and libraries comes from ECC budgets and where there is likely to be an increase in demand arising from development, contributions are expected[128].

Critical issues and implications

3.166 The Covid-19 pandemic and resulting lock downs and social distancing requirements significantly affected the use of and income for cultural facilities across the UK. The key issue for future years is likely to involve encouraging people back to use such facilities and to seek revenue support to ensure that the services and programmes to meet community needs can be provided.

3.167 Culture, creativity and the arts can contribute to the covid economic recovery and to the rural and visitor economy. Furthermore, there may be opportunities for new users as more people may be in their local areas, due to increased working from home compared to the case pre-pandemic.

Emergency services

Current context

3.168 There are three main emergency services operating in Uttlesford – the Police, Fire and Rescue and Ambulances. These are responsive organisations with a duty to serve the population within their area, and so the deployment of resources is based on response times to serve the population.

Police

3.169 Essex Police provide police services to Uttlesford residents. Development in Uttlesford will result in increased demand on the police service. The location and amount of development will influence if and how the service will need to adapt to accommodate the new population.

Fire and Rescue

3.170 The Essex County Fire and Rescue Authority is responsible for fire and rescue services covering an area over 1,400 square miles and a population of 1.8 million[129]. There are 50 fire stations provided by the authority. The Integrated Risk Management Plan[130] sets out that the current location and capabilities of appliances and crews will meet the demand within our county. This will be reviewed as the emerging local plan develops.

Ambulance

3.171 Ambulance services in Uttlesford are operated by the East of England Ambulance Service NHS Trust. The spatial distribution of development in the emerging local plan will be discussed with the ambulance service.

Delivery organisations

- Essex Police
- Essex County Fire and Rescue Authority
- East of England Ambulance Service

Funding

3.172 Funding for the three emergency services comes from government budgets and council tax. Developer contributions may also be collected if there is a demonstrable requirement.

Critical issues and implications

3.173A key issue for emergency services will be ensuring that the development proposals are considered and that the implications of the spatial strategy is understood.

[128] Essex County Council (2020) Essex County Council Developers' Guide to Infrastructure Contributions 2020 [online] Available at: https://www.essex.gov.uk/planning-advice-guidance/guidance-for-developers

[129] Essex Fire and rescue Service (no date) About us [online]. Available at: https://www.essex-fire.gov.uk/About_Us/Our_Strategy/

[130] Essex County Fire and Rescue Service (2020) Integrated Risk Management Plan 2020-2024 [online]. Available at: https://www.essex-fire.gov.uk/_img/pics/pdf_1596627142.pdf

Appendix A

Facilities Assessment

The following facilities assessment was undertaken by Uttlesford Council Officers

Parish or Village	Population Estimate 2017	Dwellings Estimated in 2019	Secondary School	Primary School	Doctors Surgery	Den tist	Food Shops	Post Office	Commun ity Hall	Rail Statio n	Allot ments
Saffron Walden	17,050	7,739	1	4	2	7	6	2	3		5
Great Dunmow	9,636	4,691	1	2	2	4	2	1	2		1
Stansted Mountfitchet	6,459	2,950	1	3	1	3	2	1	1	1	1
Thaxted	3,325	1,462		1	1	1	2	1	1		1
Newport	2,371	1,221	1	1	1		1	1	1	1	1
Hatfield Heath	2,077	793		1	1		1	0.5	1		2
Takeley	5,212	1,978		2		2	1	1	1		
Great Chesterford	1,543	776		1	2		1		1	1	
Felsted	3,112	1,209		1	1		1	1	1		
Elsenham	2,620	1,475		1	1		1	1	1	1	1
Hatfield Broad Oak	1,268	541		1	1		1	1	1		1
Clavering	1,356	566		1			1	1	1		1
Stebbing	1,363	585		1			1		1		1
Birchanger	2,632	935		1			1		1		1
Henham	1,313	557		1			1	0.5	1		1
Wendens Ambo	459	202					1		1	1	
Quendon and Rickling	610	287		1					1		1
Debden	882	338		1			1	0.5	1		
Wimbish	1,705	543		1			1	0.5	1		
Flitch Green	2,457	883		1			1		1		

Parish or Village	Population Estimate 2017	Dwellings Estimated in 2019	Secondary School	Primary School	Doctors Surgery	Den tist	Food Shops	Post Office	Commun ity Hall	Rail Statio n	Allot ments
Widdington	473	202							1		1
Leaden Roding	691	274		1			1		1		
Ashdon	920	383		1					1		1
Great Easton	1,128	449		1					1		
Little Hallingbury	1,669	616		1				0.5	1		
Littlebury	862	358							1		
Radwinter	607	283		1				0.5	1		
Manuden	684	289		1					1		
Chrishall	582	236		1					1		
High Roding	511	231							1		1
Barnston	917	381							1		
Farnham	417	184		1					1		
High Easter	756	288							1		1
Great Sampford	618	236		1					1		

Agenda Item 6

Committee:	Local Plan Leadership Group
Title:	Uttlesford Shopfront Design Guide
Date:	9th February 2022
Report Author:	Jack Bennett – New Communities Principal Urban Design Officer jbennett@uttlesford.gov.uk

Summary

1. This Design Guide is intended to provide detailed advice on matters relating to shopfront design, including the repair or refurbishment of existing shop-frontages, the reinstatement of lost frontages and details, or the introduction of new shopfronts; to ensure a consistent and high level of design and quality across the district.

Recommendation

2. That LPLG endorses the accompanying 'Uttlesford Shopfront Design Guide' document as a material planning consideration.

Financial Implications

3. The approved budget for the Local Plan in 2021-22 includes sufficient provision for the work that has been undertaken to produce this document.

Background Papers

4. The following papers were referred to by the author in the preparation of this report and are available for inspection from the author of the report:

- Uttlesford Shopfront Design Guide.

Impact

5.

Communication/Consultation	No public consultation has taken place on this document, however this is planned to take place in spring 2022 to raise this document to SPD status.
Community Safety	N/a
Equalities	N/a

Health and Safety	N/a
Human Rights/Legal Implications	N/a
Sustainability	This document helps to meet the sustainability objectives of the Council.
Ward-specific impacts	All
Workforce/Workplace	N/a

Situation

6. Changes to the NPPF and accompanying design guidance such as the National Model Design Code place greater weight on design considerations in the decision-making process.

7. Local Authorities are encouraged to produce authority-specific design guidance and this document sets clear design quality guidelines which will be used in the development management process. Pre-application discussions, application assessments and design feedback will be structured around the document to encourage continuity of output from the planning department.

Risk Analysis

8.

Risk	Likelihood	Impact	Mitigating actions
▪ That no such design guidance is developed	▪ 1 - the NPPF advises to address design quality and produce authority specific guidance	▪ 2 - no district specific design guidance would result in defaulting to less specific national guidance	▪ The accompanying design guide can be used by the planning department to inform design considerations in the negotiation and decision-making process

1 = Little or no risk or impact
2 = Some risk or impact – action may be necessary.
3 = Significant risk or impact – action required
4 = Near certainty of risk occurring, catastrophic effect or failure of project.

Next Steps

See proposed programme for Shopfront Design Guide endorsement and then adoption as SPD:

- February 2022 LPLG – endorse as interim guidance.
- Spring 2022: Consultation 4-6 weeks as draft SPD linked to 2005 Local Plan.
- Review representations and make appropriate changes.
- Spring 2022: LPLG prior to adoption
- Summer 2022: Cabinet to adopt (with JET before cabinet)

Uttlesford Shopfront Design Guide

Published: February 2022

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1.0 Introduction

1.1 Purpose

1.11 Central Government, in light of the Building Better Building Beautiful Commission, the NPPF (July 2021), and the National Model Design Code encourages Local Authorities to produce guidance on a range of issues, which includes design and advertising. This includes shopfront design.

1.12 This Shopfront Design Guidance expands on several policies in the Uttlesford Local Plan adopted 20 January 2005. The Guide supports the following policies: Policy GEN2– Design; Policy ENV1 – Design of Development within Conservation Areas; Policy ENV2 – Development Affecting Listed Buildings and Policy RS2– Town and Local Centres. Planning applications involving alterations to existing shopfronts, or the introduction of new shopfronts, will be considered against these policies.

1.13 This document should be read in conjunction with the above policies and aims to provide additional guidance on matters relating to the design of, and alterations to existing, shopfronts and commercial signage in Uttlesford.

1.14 Any future proposals should also take into account the guidance set out in the **Essex Design Guide**, available to view at www.essexdesignguide.co.uk and National Design Guide. Further advice is also available from the Historic Towns and Villages Forum and publications by English Heritage including '*Retail Development in Historic Areas*', '*Energy efficient and historic buildings*' and '*Traditional windows, care, repair and upgrading*'.

1.2 Intended Outcome

1.21 This Design Guide is intended to provide detailed advice on matters relating to shopfront design, including the repair or refurbishment of existing shop-frontages, the reinstatement of lost frontages and details, or the introduction of new shopfronts; to ensure a consistent and high level of design and quality across the district.

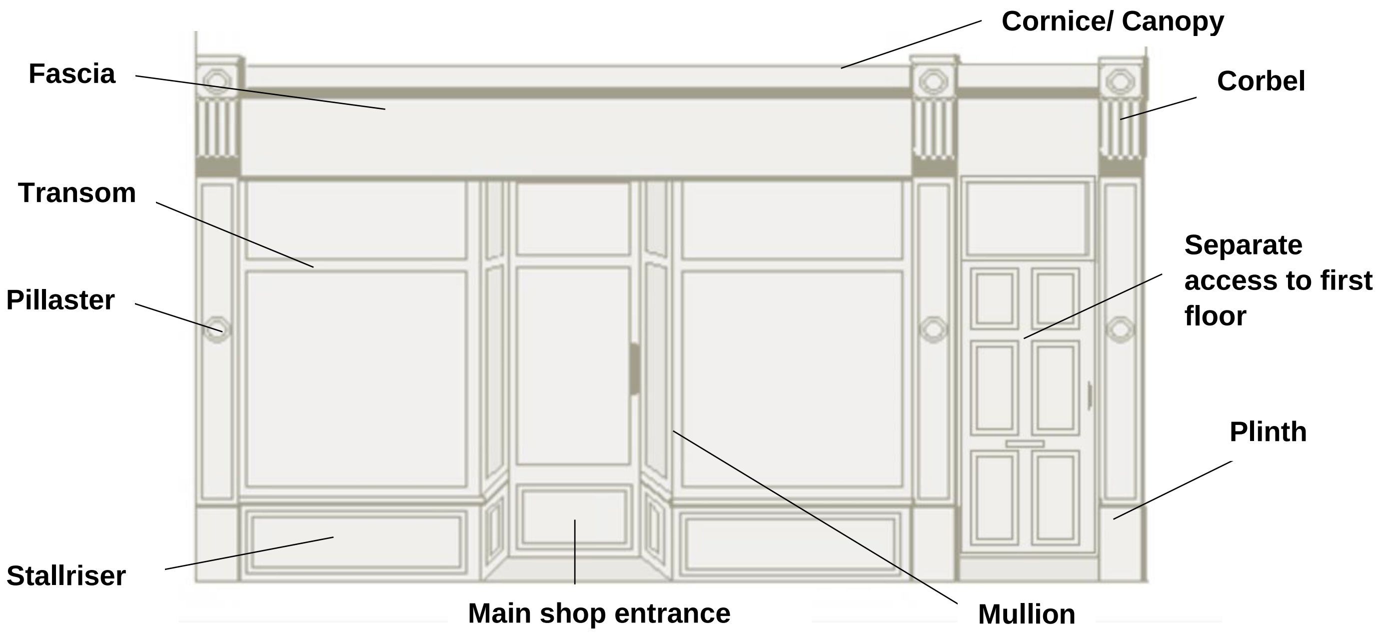
1.22 This guidance is intended to be beneficial to commercial building owners, agents and members of the public, who are considering making alterations to, or designing new, shop-frontages within the district.

1.23 It is also intended to be a tool for planning officers when considering applications relating to the refurbishment, alteration, introduction or even removal of existing shopfronts.

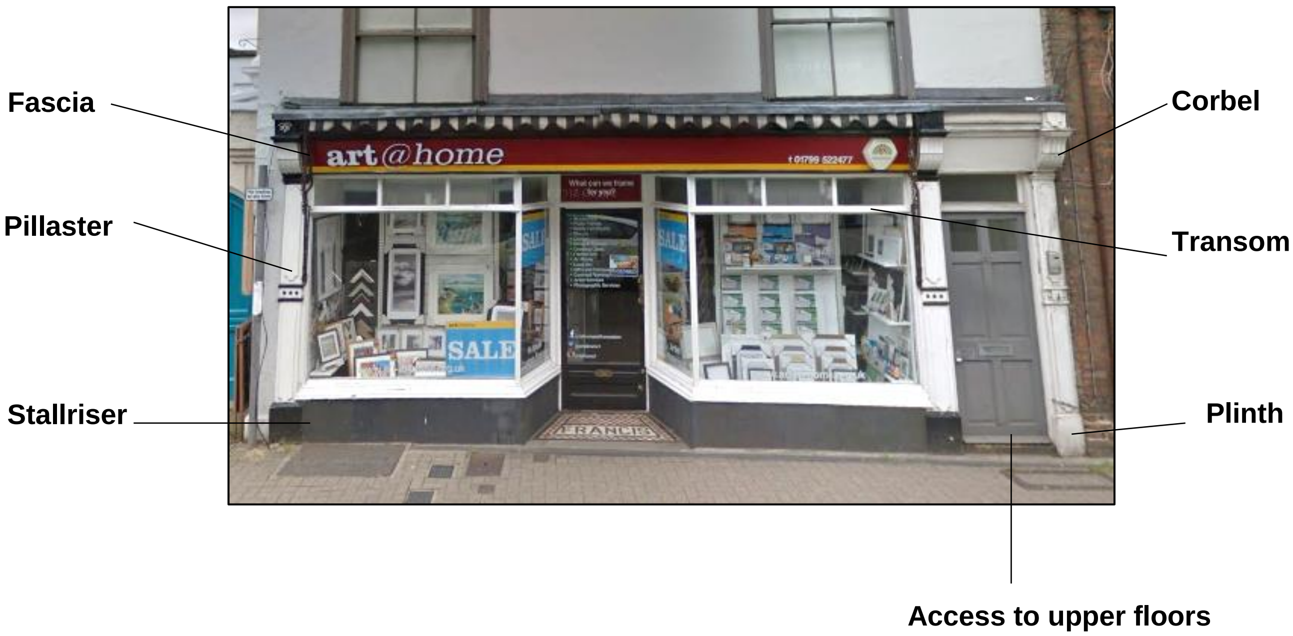
2.0 Shopfront Styles

2.1 Traditional Shopfronts

2.11 The key elements of the traditional shopfront are labelled below. They are based on the classical form of the temple front and represent the plinth (stallriser), columns (pilasters), capitols (consoles) and the frieze (fascia).



2.12 Traditional shopfronts will usually have a door to the side also, to provide access to the upper floors, as shown in this local example below:



3.0 The Importance of Good Shopfront Design

3.01 Shopping is an integral part of our everyday lives, and shopfronts contribute enormously to the character of our cities, towns and villages. They are fundamental to not only the distinctiveness and appearance of our built environment, but also to its economic prosperity.

3.02 In preserving the high quality of our shop frontages, and insisting upon appropriate and well thought out signage, this in turn:

- improves the quality of the environment in which we work, live and shop
- draws customers into our towns and villages to shop locally
- supports smaller, locally run businesses
- boosts the local economy, *and*
- promotes a strong sense of community

3.1 Retaining, re-using and restoring traditional shopfronts

3.11 Where a traditional shopfront exists, this should generally be retained and refurbished as necessary. This is an environmentally sustainable approach and preserves the historic character and appearance of the street-scene.

3.12 Where historic details have been lost or obscured, these should be reinstated or exposed to reveal the traditional character of the shopfront and enhance its overall appearance.

3.13 New signage should be carefully considered to minimise loss of historic fabric or traditional features, and to avoid obscuring or compromising the traditional details. A modest, well detailed painted fascia and proportionate hanging sign is usually sufficient for advertising purposes.

3.14 Repairs should usually be carried out in a like-for-like manner, and fabric replaced only where absolutely necessary and beyond repair.

3.15 Missing details and features should be replaced where there is sufficient evidence of their presence, to support reinstatement. Conjectural reinstatement, based on assumptions of what ‘would’ or ‘should’ have been there, should be avoided.

3.2 Replacing shopfronts

3.21 Though we might be more inclined to value traditional shopfronts from the late 18th through to the early 20th centuries, later examples should not be dismissed out of hand as having little or no value. Early to mid C20th examples, incorporating Art Deco, Art Nouveau or Modernist detailing can add interest and variety to the street-scene whilst an original post-war C20th example, in a planned post-war shopping development for example, can tell an important story about the development of shopfronts over the years, and is likely to be more in-keeping with its immediate context.

3.22 Where the shopfront is part of a planned development of its period and is in-keeping with the host, and neighbouring buildings, it would be desirable to retain it.

3.23 Where a shopfront is a later replacement and is out of context with the host building, or neighbouring buildings, due to scale, proportion or inappropriate detailing and materials, it may be desirable to replace this with a more sympathetic shopfront.

3.24 In deciding on a replacement shopfront style, the design should always take its cue from the character of the host building, and neighbouring properties where appropriate. The shopfront should not be designed in isolation, but should take into account existing character, style, detailing and proportions of the whole building.

3.25 The Council **will not support** the demolition or replacement of traditional or quality shopfronts within a conservation area, which positively contribute to its character and appearance.

3.3 New Shopfronts

3.31 As with replacement shopfronts, similar principles apply. The proposed design should always take its cue from the character of the host building, and neighbouring properties where appropriate. The shopfront should not be designed in isolation, but should take into account existing character, style, detailing and proportions of the whole building.

3.32 Despite the modern nature of the shopfront, materials should be of a high quality and in-keeping with the prevailing pallete of materials in the locality. Similarly, details, scale, style and colour choice should respond positively to the wider context and preserve and enhance the character and appearance of the area.

3.33 Applications which fail to preserve or enhance the character and appearance of the locality, in particular a conservation area, or actively detract from the significance or setting of a listed building, **will not be permitted**.

4.0 Key Shopfront Design Principles

4.1 Principles

4.11 In this document, the term ‘shop’ relates to all street-level commercial businesses with a formal shopfront, fascia sign or display window. This includes other commercial premises such as restaurants, cafés, estate agents, public houses, banks, information centres, take-aways and other commercial business.

4.12 Whilst this guidance is predominantly aimed at shopping areas in the main towns or large villages, the principles may apply equally to commercial businesses in smaller villages and rural communities.

4.13 There is a growing pressure on business premises to respond to modern practices and corporate identity, sometimes at the expense of traditional character and local distinctiveness. Examples of this might be:

- the use of standardised corporate signage, which may be out of context with the host building, or wider character, due to the choice of materials, lettering or colour pallete
- removal of traditional details to achieve a more standardised, easily maintained, or secure frontage
- the introduction of large non-traditional fascia’s that are out of proportion with the building
- the conversion of several units into one, to increase floorspace, often with a continuous fascia or frontage
- the installation of inappropriate security blinds, security cameras or burglar alarms

4.14 All of the above can have a damaging effect in isolation, but the cumulative impact of these changes in a town or village context, can seriously impact on character, appearance and local distinctiveness.

4.15 Below is a list of general principles to consider when considering making alterations to, reinstating, or designating new shopfronts.

4.16 A well-designed contemporary shopfront can complement a historic building and give scope for a creative design that can add to local distinctiveness. It should reflect traditional proportions, dimensions, and elements such as pilasters, fascia, and projecting cornice. High quality materials and detailing must also be provided, and poor practice or inappropriate design will be discouraged as set out in the relevant sections of this guide.

4.17 Good quality shopfront design will:

A: Seek **to preserve or enhance existing traditional forms, details or materials** which contribute positively to the host building and wider street-scene
B: **Respect the existing character and proportions** of the host building and its neighbours, including first floor detailing
C: **Reinforce local identity and distinctiveness**
D: **Clearly convey the trade/ business use** to the public using appropriate and well-appointed imagery or signage that is in-keeping with the period and style of the host building
E: **Clearly denote the main entrance**, which should be independently accessible to all, where possible (See Section 2.4)
F: **Add visual interest** to the street-scene, without assuming an air of prominence which detracts from neighbouring properties
G: **Have a clear identity and style**, which is appropriate to the host building and responds positively to the wider street-scene
H: **Successfully integrate security measures and lighting** (where appropriate) within the design (For lighting, see Section 5.0)
I: **Visually differentiate historically independent and neighbouring units** of different use, particularly where two or more units have been converted to a single use.
J: **Avoid use of overpowering or out-of-keeping corporate signage**, and embrace a holistic approach to company branding, in the local context

4.2 Excessive signage

4.21 Excessive levels of signage results in street clutter. This can appear untidy and detracts from the appearance of the street-scene. In a Conservation Area, it can seriously compromise the area's special character and detract from the historic significance and quality of the built environment.

4.22 A modest and well-detailed fascia and proportionate hanging sign will usually be sufficient to advertise a business. Where non-commercial buildings have been converted for business use, the level of signage permitted will be guided by the character and details of the host building.

4.23 The use of A-Boards should be avoided, in all forms. They compromise pedestrian use of the pavement, add to street clutter and may cause injury if not adequately secured or weighted.

5. 0 Examples of Good Shopfront Design

5.1 Fascia

5.11 The fascia is a crucial part of the shopfront. It is important that its size and detailing is in-keeping with the wider shopfront and the proportions of the whole building. Predominantly made of timber, early examples (18th and 19th century) tended to be flat, but later on, they became angled, tilting downward to make the signage easier to read.

5.12 The Fascia should be proportionate in depth to the wider shopfront and host building. An excessively deep fascia appears unsightly and creates an imbalance of proportions.

5.13 Sufficient spacing should be retained between the top of the fascia and the bottom of the first-floor windows to avoid the shopfront encroaching on the first floor which creates a visual conflict.

Figure 2: Example of traditional shopfront. The lettering is sympathetic in its font and size and in proportion to the depth of the fascia.

Figure 1: Example of inappropriate signage with an excessively deep fascia sign, and lack of adequate spacing between the shopfront and first floor windows.

5.14 The fascia should generally be natural timber and painted. Other materials may be considered where in-keeping with the wider shopfront, but synthetic or highly reflective finishes will not be supported.

5.15 The depth of the fascia should always be proportionate to the shopfront as a piece, and the host building. However, when designing replacement, or new shopfronts, the fascia should not exceed 450mm in depth. This reflects the typical depth of a traditional fascia (380mm) and allows for a reasonable margin for present day requirements.

5.16 Signwriting directly onto a timber fascia is often the most sympathetic treatment, as it can be changed easily with little harm to fabric. The use of gold leaf shading can also add interest and increase visibility in the evening/ night.

5.17 The application of a box fascia or applied panel onto a timber fascia will be resisted.

Figure 3: Example where signage has been extended over two units, and appears out of proportion with the host buildings, and obscuring the individual character of each unit.

5.2 Consoles/Corbels

5.21 Consoles, or corbels, are a strong visual element of the shopfront, and provide a formal stop to the shopfront, vertically and horizontally. Victorian examples are often highly decorated, but even modest, relatively plain consoles represent an important part of the overall frontage. As such they **should always be retained**.

5.22 Where consoles, or corbels are in need of repair or replacement, this should be done in a like-for-like manner, and replacements commissioned to match the detail and profile of the existing.

5.23 When designing corbels as part of a replacement or new shopfront, inspiration should be sought from the host building, and neighbouring examples. In general, new shopfronts should adopt a plainer, more modest design.

5.3 Cornice

5.31 The cornice is a both an aesthetic and functional element of the traditional shopfront. It marks the end of the shopfront, but also sheds water. Whilst new designs might not adopt this feature in its traditional form, its function should be considered as part of the design.

5.32 The cornice provides an opportunity to house lighting in a sympathetic and discreet manner.

5.4 Stallriser

5.41 The stallriser is a key component of the traditional shopfront and serves a purpose in new designs, in increasing security, and reducing the risk of ram-raiding. They are generally timber with panel detail, though later examples may be marble, tiled, rendered or exposed brick. The use of material will depend on the wider shopfront design and the style of the host building; however, **timber is nearly always most appropriate**.

5.42 The stallriser should be of sufficient height to preserve the proportions of the shopfront and will generally match the height of the base of the pilasters.

5.5 Pilasters

5.51 Pilasters are the slightly projecting vertical elements on either-side of the shopfront. They serve a visual and aesthetic purpose in defining the extent of the shopfront, horizontally, and differentiating neighbouring units. They also act as a visual support to the consoles, and fascia, creating a complete frame to the shopfront.

5.52 Original, or traditional pilasters should not be covered up, or boxed in. Where this has occurred previously, the opportunity should be taken to reinstate these features.

5.53 Original, or good quality pilasters should be repaired, in a like-for-like manner and retained rather than being replaced. This is a more sustainable approach, and better preserves the character and interest of the building.

5.6 Windows and Doors

5.61 Traditional windows often feature smaller panes of glass, mounted in timber glazing bars, in what is considered a typical ‘Georgian’ pattern. This is a traditional shopfront window detail and serves an additional functional purpose. The increased strength and limited glazing reduces the risk of crime or ‘ram-raids’.

5.62 Later windows tend to feature larger panes of glass, with vertical timber rails (mullions) or horizontal timber rails (transoms) which provide structural stability and visually break up the expanse of glazing. This often adds interest to the glazing, with the smaller panes above the transoms, also known as ‘transom lights’, featuring additional detail.

5.63 Traditional windows should always be retained and repaired as necessary in a like-for-like manner. The original glazing pattern, including transoms and mullions should also be retained.

5.64 When designing a replacement shopfront, the choice of glazing detail or pattern should be influenced by the style of the host building, and neighbouring properties.

5.65 Applied, brightly coloured films should be avoided. Where absolutely necessary for privacy reasons or to obscure unsightly views of shelving or appliances, these should be opaque and neutral in colour. They should not extend over the full-height of the window and must be reversible.

5.66 Traditional doors should also be repaired and retained where possible, unless they actively detract from the character and appearance of the host building and neighbouring properties, in which case they will not be supported. New elements that are installed to improve the environmental performance of the building must be designed sympathetically. See also Historic England documentation: '*Energy efficiency and historic buildings*' and '*Traditional windows, care, repair and upgrading*'.

5.67 When designing a new shopfront, or replacing a modern door in a traditional shopfront, it will usually be necessary to include a solid panel to the bottom, to mirror the stallriser.

5.68 Traditional ironmongery should always be retained or replaced in a like-for-like manner where necessary. Modern ironmongery, for example door handles, onto a traditional door will appear incongruous and detract from the design and appearance of the shopfront.

5.7 Colour and Materials

5.71 It will almost always be most appropriate to reinstate, or install new, shopfronts using timber. It is less likely to age stylistically, is easily worked to a variety of profiles, is sustainable and generally more in-keeping with the locally distinctive character of towns and villages in Uttlesford.

5.72 When carrying our repairs to, or replacing elements of, existing traditional shopfronts, the new materials must match the existing and represent a good quality repair.

5.73 It might sometimes be appropriate to replace elements on a shopfront, which have been added, or replaced over time with unsympathetic materials. Where this is the case, like-for-like replacement is likely to be inappropriate, and a return to traditional original materials to compliment the wider shopfront, and host building, would be supported.

5.74 The importance of maintaining a harmonious street-scene cannot be underestimated, and whilst it is reasonable that individual units, and businesses, differentiate themselves from one another, the use of inappropriate paint colours for shopfronts, and signage in particular, can have a highly detrimental impact on the overall character and amenity of a town or village.

Figure 4: Example where middle shopfront is out of keeping with the wider terrace, and detracts from the character and appearance due to unsympathetic colour choice.

5.75 Overly bright or non-traditional colour combinations will be resisted, and a neutral or traditional colour pallete reflecting historic pigments encouraged, to ensure that the overall quality of the area is not compromised. This applies in all areas, but designated conservation areas and listed buildings are most sensitive to the impacts of inappropriate use of colour.

5.76 When considering a colour choice for the shopfront, one should also consider the colour/ finish of the host building, to ensure that they complement each other.

6.0 Lighting

6.1 External illumination

6.11 Excessive external illumination of a shopfront will be resisted, as it is generally out-of-keeping with the historic, and locally distinctive character of the district. Illumination of the fascia is very rarely necessary, and only in cases where the business is regularly open into the evening.

6.12 A modest level of lighting might be permitted, provided this is housed appropriately, where possible in the cornice and occasionally via a small number of swan-neck lights. These should be of a warm-light rather than the harsher ‘white’ light of LED’s.

6.13 Illumination may be provided for hanging signs. In this instance, modest fittings should be incorporated into the hanging bracket.

6.2 Internally illuminated signs

6.21 The use of internally illuminated signage, on the exterior of a building, will be resisted as it is likely to compromise the predominantly historic character and appearance of the district.

6.22 No internally illuminated signage, of any kind, will be supported in a Conservation Area, or on a Listed Building.

7.0 Other

7.1 Hanging Signs

7.11 The hanging sign, can be an effective method of enhancing street-presence whilst adding interest to the street-scene. Signs should usually be timber, suspended on a wrought-iron bracket. Occasionally, a metal sign might be appropriate, though this is dependent on the style and period of the shopfront, and host building.

7.12 Hanging signs of composite, or man-made materials, should be avoided and will be resisted in the Conservation Area, or on a listed building.

7.13 The size of a hanging sign will usually be determined by the depth of the fascia. Where the fascia is undesirably deep, the hanging sign should be more modest in its scale.

7.14 A proliferation of hanging signs in the Conservation Area should be avoided, as this results in street clutter and detracts from the character of the street-scape and distracts the eye from the quality and detail of the buildings themselves.

7.15 It is sometimes possible to include modest illumination within the bracket of the signs. This should be discreetly located, and not immediately visible when not in use.

7.2 Blinds and Canopies

7.21 The use of roller blinds on traditional shopfronts will be supported, and where existing, these should be retained as they are an aesthetically pleasing and functional element of the shopfront. They can add interest to the wider street scene, and can provide over for patrons, inviting the public to browse the window.

7.22 Where blinds have been removed, but the mechanism remains, this should be retained in situ, and the opportunity taken to reinstate this feature in the future, if appropriate.

7.23 The installation of modern 'balloon' canopies, or alternatives which are not in-keeping with the style or period of the building, or which detract from the wider street scene will be resisted, as these often obscure the fascia signage and in turn dilute the impact of signage, respond poorly to the existing shopfront and can contribute to undesirable street clutter.

7.3 Security Shutters

7.31 The installation of security shutters should always be carefully considered to minimise harm to the character and appearance of the shop frontage, the host building and wider street-scene.

7.32 Roller blinds will generally be resisted, as they are harmful to the character of the shopfront and a target for graffiti and potential anti-social behaviour. In addition, a solid blind can provide effective cover for thieves who successfully manage to gain entry to the property, thereby disguising crime.

7.33 Brick pattern security grilles are best used and accommodated within the building. This reduces their visual impact, removes the risk of graffiti, and allows visibility.

Figure 5: The roller blind on the left, obscures visibility into the shop, which compromises security and is a target for graffiti. The security grille on the right is more sympathetic to the traditional character of the shopfront, and enables visibility into the premises

7.4 Security Alarms and cameras

7.41 The installation of security alarms or cameras should be avoided where possible, particularly on traditional shop frontages. Where they are genuinely necessary, they should modest in scale and colour and be located in a discreet position to minimise harm the character and appearance of the building.

7.42 Devices should be wireless where possible, to avoid unsightly cables and minimise impact to fabric during installation.

7.5 Upper Floors

7.51 Where separate commercial premises are operating at first floor, it will often not be possible to provide external signage. A surfeit of hinging signs would detract, and installation of a separate fascia or fixed board would be harmful and detract from the proportions and traditions appearance of the ground floor shopfront.

7.52 Business may wish to consider the application of modest sign-written letters directly onto the window-glass to advertise their location. This should be restricted to letters only, depicting the company name, and of an appropriate scale to respect the detailing and proportions of the window.

7.6 Accessibility

A well-designed shopfront should provide separate access to the upper floor, unless safe and secure access is provided elsewhere, by the side or rear of the property.

The main entrance should be ramped where possible, to facilitate access for all. Where possible, this entrance should be independently accessible to those in wheelchairs or pushchairs. In some instances, however, with listed buildings for example, this might not always be possible. In these scenarios access will need to be considered further, with an access audit and reasonable adjustments made. See '*Easy Access to Historic Buildings'*, by Historic England.

7.8 Non-commercial buildings

7.81 Where a non-commercial property has formally received a change of use, or is legitimately in use as business, traditional signage may not be possible. This relates primarily to cases where there is no formal shopfront, and no fascia. In such cases, a more pragmatic response is often needed in designing appropriate signage.

7.82 The installation of a hanging sign can often be supported, provided it is of a modest scale and appropriate materials and design.

7.83 Opportunities should also be sought to advertise through sign-written lettering on existing windows, subject to scale, colour and detail. This is often more sympathetic and effective than an affixed sign, which often harms the proportions and character of the elevation and detracts from the building as a whole.

7.84 Where a commercial building has undergone a change of use, to domestic use for example, some of the principles above will largely still apply, in that it would be preferable to retain any traditional shop frontage, to evidence the original form and function of the building.

8.0 Legislation

8.1 Local Plan

8.11 This guidance should be read in conjunction with the Uttlesford District Council Local Plan. It serves to elaborate on policies GEN2 Design, ENV1 Design within Conservation Areas, ENV2 Development Affecting Listed Buildings and RS2 Town and Local Centres, and should be used by planning officers when determining planning and/ or listed building consent applications in relation to alterations to shopfronts in the district.

8.2 Advertisement Consent

8.21 Some forms of advertising, such as signs, will require planning permission under the *Town and Country (Control of Advertisements) Regulations 2007*. This includes:

- the majority of illuminated signs,
- advertisements using specialised structures for their display, such as poster hoardings and most non-highway authority roadside advance warning or directional signs,
- signs positioned above 4.6 metres in relation to buildings above the level of the bottom part of first floor windows or on gable ends[1].

8.3 Planning Permission

8.31 Any Significant alterations to an existing shopfront, the erection of a new shopfront, change of use, or installation of a temporary hoarding **will require formal planning permission** under the *Town and Country Planning Act 1990*.

8.4 Listed Building Consent

8.41 Any alterations to a listed building **will require Listed Building Consent** under the *Planning (Listed Buildings and Conservation Areas) Act 1990*. This includes minor alterations to signage, erection of new fascia's, applied lettering or hanging signs.

8.42 Listed Building Consent would be required irrespective of whether or not Planning Permission is required. If in any doubt, please contact the Conservation Officer to discuss your proposals, prior to the commencement of works.

[1] Information sourced from Planning Portal <www.planningportal.co.uk> (February 2018)

8.5 Conservation Areas and Article 4 Directions

8.51 The demolition, removal or alteration of a shopfront with a designated conservation area **will also require planning permission** under the *Planning (Listed Buildings and Conservation Areas) Act 1990*. Applications will be considered against the guidance set out in the NPPF, 2012. There will be a presumption in favour of the preservation of the character and appearance of the conservation area.

8.52 Some conservation areas, or individual properties, may also benefit from an Article 4 Direction, which removes selected permitted development rights. Where an order applies to the building in question, you may be required to apply for planning permission, even if the works would normally be considered permitted development.

Further details regarding Article 4 Directions can be found our website at https://www.uttlesford.gov.uk/article/4901/Article-4-Directions

Further information, including applications forms, fee information and a list of validation requirements can be found at www.uttlesford.gov.uk/planning

If you have a query regarding the application process, please contact the Development Support Team on 01799 510510

If you are unsure whether you need planning permission, please contact Customer Services on 01799 510510 and ask for duty planning officer. Planning Duty Officer available 9am – 12pm (Mon – Friday)

Useful Links:

Planning Portal - www.planningportal.co.uk

Historic Towns and Villages Forum - http://www.htvf.org/

Essex Design Guide – www.essexdesignguide.co.uk