Uttlesford District Council

Uttlesford Local Development Framework:
District Retail Study

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APPENDICES

1.0 INTRODUCTION

1.1 Hepher Dixon Ltd were appointed by Uttlesford District Council following an invitation to tender to produce a district retail study which will form part of the new Local Development Framework.

1.2 The purpose of this study is to help inform the new Local Development Framework through examining the future retail need and capacity within the District. This includes assessing need arising from new housing growth proposed in the draft East of England Plan and the potential of town centres to accommodate any identified need.

1.3 This study has been produced in consideration of National policy, the Draft East of England Regional Spatial Strategy, Essex and Southend-on-Sea Replacement Structure Plan and the Uttlesford District Plan Adopted 2005.

Scope of the Study

1.4 The scope of the study is as follows:

- A detailed review of the current retail planning policy at a national, regional, strategic and local level. Due consideration will also be made in relation to proposed housing growth in current and emerging national, regional and local level policies;
- A quantitative and qualitative analysis of Saffron Walden, Great Dunmow, Stansted Mountfitchet and Thaxted town/local centres;
- An assessment of retail demand in the key market sectors and the amount of additional retail floorspace provision; and
- An assessment of potential sites should a need be identified.

Structure of the Study

1.5 Section 2 of the study reviews the national, regional and local planning policy.

1.6 Section 3 of the study includes a review of the existing shopping provision within Uttlesford.

1.7 Section 4 provides a quantitative assessment of the need for additional floorspace in the District.

1.8 Section 5 sets out an assessment of potential development opportunities relating to retail development within the District's main centres.

1.9 Section 6 draws together the results of the study and sets out the implications and the future direction for retail development within the District.

2.0 PLANNING POLICY FRAMEWORK

2.1 This section summarises the current retail planning policy framework in respect of national, regional and Development Plan policy which is applicable to the district.

National Planning Policy

Planning Policy Statement 6 "Planning for Town Centres" (PPS6)

2.2 PPS6 sets out the Government's broad policy objectives and proposed planning polices relevant to planning for town centres. The final version was published in March 2005. To a large extent, PPS6 represents a clarification of existing retail policy rather than a radical change.

2.3 The key messages of PPS6 are:

- A re-emphasis of the 'town centres first' objective;
- The need for a plan led approach at both regional and local levels;
- The need for local planning authorities to plan for growth and growing town centres;
- The need to tackle social exclusion by ensuring access for all to a wide range of everyday goods and services; and
- The need to promote more sustainable patterns of development with less reliance on the car.

2.4 Paragraph 1.65 sets out that local planning authorities should plan positively for the growth of, and development in, existing centres through:

- Focusing development in, and securing the expansion of, existing centres as appropriate, and identifying appropriate sites in their development plan documents;
- Promotion of town centre management, creating partnerships to develop, improve and maintain the town centre, and
- Regular review of the impact and effectiveness of their policies.

2.5 Paragraph 1.7 reiterates the guidance in PPG6 that it is not the role of the planning system to restrict competition, preserve existing commercial interests or to prevent innovation. The guidance relates to a wide range of town centre uses, not just retail.

2.6 In the context of development control, local planning authorities require applicants to demonstrate:

- The need for development;
- That the development is of an appropriate scale;
- That there are no more central sites for the development;
- That there are no unacceptable impacts on existing centres;
- That locations are accessible.

2.7 Paragraph 3.5 sets out that as a general rule, the development should satisfy all these considerations. However, there may be exceptions, where the overall weight of evidence justifies favourable treatment even if the development performs poorly against one or more of the considerations. In making their decision, local planning authorities should also consider relevant local issues and other material considerations.

2.8 In assessing the need and capacity for retail development local planning authorities should place greater weight on quantitative considerations, although full account should be taken of both quantitative and qualitative considerations. The quantitative assessment should relate to the class of goods proposed. Business based assessments will not be appropriate. Need should normally be assessed no more than 5 years ahead.

2.9 Paragraph 3.14 states that the sequential approach to site selection should be applied to all development proposals for sites that are not in an existing centre nor allocated in an up to date development plan document.

2.10 In applying the sequential approach paragraph 3.15 requires developers and operators to demonstrate that they have been flexible about their proposed business model in terms of scale, format, car parking and scope for disaggregation. However, it also requires LPA's to be realistic and to take account of any genuine difficulties which the applicant can demonstrate are likely to occur in operating their business from a sequentially preferable site. The advice is therefore advocating a balanced approach, seeking to direct retail development towards town centre where possible but taking account of the constraints imposed by operator requirements.

Regional Planning Policy

2.11 The Regional Spatial Strategy (RSS) for the East of England (dated 2004) sets out a strategy to guide planning and development in the East of England to the year 2021. It is the first integrated Regional Spatial Strategy for the East of England region, delivering unified guidance. It covers economic development, housing, the environment, transport, waste management, culture, sport and recreation, mineral extraction and implementation.

2.12 The RSS provides a vision for the East of England to sustain and improve the quality of life for all people who live in, work in, or visit the region, by developing a more sustainable, prosperous and outward-looking region, while respecting its diversity and enhancing its assets. The Plan proposes employment led growth based on key economic sectors and cluster development; a stronger focus on regeneration of lagging areas; a 15% increase in future housing provision; a doubling of affordable housing output; and a proactive approach to implementation. It also presents the first Regional Transport Strategy, pursuing a more sustainable approach to future transportation planning and its relationship to the land-use planning system.

2.13 The RSS is organised by a core spatial strategy (CSS) which is applicable to the whole of the region, policies relating to particular sub-regions/areas and then by policies relating to specific topics and activities.

2.14 CSS Policy SS5 'Town Centres' places a great importance on the role of town centres. It describes them as being thriving, vibrant and attractive and fundamental to the sustainable development of the East of England. It continues that they will continue to be the focus for investment, environmental enhancement and regeneration.

2.15 The policy states that within the context of a community strategy approach, local development documents, supported by transport plans and economic, environmental and cultural strategies, will:

- include a strategy for each town centre to promote successful mixed use economies, manage change, refocus where necessary and support cultural heritage;
- protect and enhance existing neighbourhood centres and, where a need is established, promote new provision of an appropriate scale and function to meet local day to day needs; and
- ensure land is allocated to meet the full range of identified needs.

2.16 RSS Policy SS9 'Development in Rural Areas' states that development in rural areas will be focused in market towns and thereafter in key service centres. The policy lists a number of criteria which authorities will need to consider in order to sustain vitality and secure revitalization. These are:

- accommodate additional housing, employment growth and economic diversification;
- enhance the environment of the town centre;
- improve the accessibility of the town by public transport from surrounding rural areas;
- extend provision for shopping facilities and services in the town centre; and

- improve access to high-speed communications technology to assist economic diversification.

The policy also considers other centres (key service and rural settlements) and how local authorities should accommodate new development within them.

2.17 Turning to retailing, the Stansted / M11 sub-region is part of the wider London-Stansted-Cambridge-Peterborough growth area identified in the Sustainable Communities Plan. These sub-regional policies are of particular relevance because of projected housing growth resulting in demand for improved retailing facilities.

2.18 Policy E9 'Regional Structure of Retail Centres' identifies the composition of the regions retail structure and the major regional centres. It identifies the major regional centres as being Basildon, Cambridge, Colchester, Chelmsford, Ipswich, Norwich, Peterborough, Southend, and Watford and the regional centres as being Bedford, Bury St. Edmunds, Great Yarmouth, Harlow, Hemel Hempstead, King's Lynn, Lowestoft, Luton, St Albans, Stevenage and Welwyn Garden City. Other towns, market towns, villages and local centres are defined in the Local development documents. Although neither the policy or supporting paragraphs refer to Uttlesford's town centres, paragraph 5.104 and 5.121 refer to Saffron Walden as being a 'market town' and describes Great Dunmow as a 'small town'.

2.19 The supporting paragraphs state that regardless of designation, all local centres play a key role in meeting the needs of their catchment areas and as surrounding competing centres grow, each centre must respond to this impact by upgrading what they have to offer.

2.20 Policy E10 titled 'Retail Strategy' comments on the retail strategy for the region. The supporting paragraphs state that research undertaken within the region did not identify any need for major change to the retail structure to meet existing need. However, where there is significant growth within the region's Sustainable Community Plan growth areas and priority areas for regeneration retail growth will be essential to meet new needs.

2.21 EERA and local authorities would need to plan more positively for retail in order to:

- maintain and enhance the viability and vitality of retail centres; and
- make proper provision for new forms of retail distribution.

2.22 This can be achieved through retail centres supporting and enhancing their existing functions and absorbing expenditure growth through higher quality development without changing the centre's position in the regional structure. However, major retail development can also be a driver of growth and regeneration, so in the Sustainable Communities Plan growth areas and the regional growth areas, significant retail and associated services growth will be needed to deliver sustainable communities. The implications of this growth will need to be carefully considered at the sub-regional level and planned for through the development plan process.

2.23 Policy E11 'Retail Distribution' restricts strategic retail distribution centres to locations with good rail and road access and, where available, waterway access. The policy also advises that Local development Documents (LDDs) should consider the need and how the development supporting the local sourcing of products could be encouraged.

2.24 Policy E12 'Out-of-Town Retailing' states that during the plan period no new regional out-of-town shopping centres are needed and LDDs are to define the current and future role of existing out-of-town centre retail sites in relation to existing town centres, in particular to determine whether:

- out-of-town centre sites should remain purely retail centres;
- they should be developed into town centres with a full range of service provision; and

Out-of-town centres will only be developed into town centres where they will:

- improve social, environmental and economic sustainability;
- deliver improved sustainable transport accessibility, particularly improved public transport access.

Local Planning Policy

Uttlesford Local Plan Adopted 2005

2.25 The Uttlesford Local Plan was formally adopted on the 20th January 2005.

2.26 Chapter 2 sets out the spatial strategy i.e. where development is, in principle, proposed, and where there will be a strict control over building. Policy S1 Development Limits for the Main Urban Areas identifies Great Dunmow, Saffron Walden and Stansted Mountfitchet as areas where major urban extensions, development within the existing built up area and on the edge of the built up area would be acceptable provided the development meets the criteria of the rest of the Plan. Policy S3 identifies Thaxted amongst others as a key rural settlement. The policy allows for development compatible with the settlement's character and countryside setting as being acceptable.

2.27 Retailing issues are dealt with under the policies contained in the retailing and service chapter as well as under the retailing section for specific towns. The local plan identifies that in 2000, the health of Uttlesford's four towns (Saffron Walden, Great Dunmow, Stansted Mountfitchet and Thaxted) was somewhat fragile and vulnerable to loss of trade. Therefore, the policies in this section have the following objectives:

- To sustain and enhance the vitality and viability of Saffron Walden as a principle shopping centre, of Great Dunmow as a smaller town centre, and the local centres of Stansted Mountfitchet and Thaxted;
- To promote mixed use commercial developments in these centres;

- To focus commercial and mixed use commercial developments in locations that maximise the opportunities to use means of transport other than the car; and
- To prevent further loss of retail and other services in the rural areas.

2.28 Policy RS2 'Town and Local centres' allows retail, commercial and community uses or mixed-use development in Saffron Walden, Great Dunmow, Stansted Mountfitchet and Thaxted subject to set criteria being met. The following criteria must be satisfied:

- It maintains or enhances their role as retail and service centres;
- It does not harm their historic and architectural character;
- It contributes to the diversity of retail and other commercial activity;
- It does not result in significant loss of housing or flats; and
- It does not prejudice the effective use of upper floors as living or business accommodation.

2.29 Policy RS3 'Retention of Retail and other Services in Rural Areas' looks at the circumstances in which the change of use of a community facility will be permitted.

2.30 There are additional policies for each of the centres for Saffron Walden, Great Dunmow, Stansted Mountfitchet and Thaxted discussed below. The policies are area specific and only relate to the town in which they are applicable.

Saffron Walden

2.31 Retailing in Saffron Walden town centre is dealt with by Policy SW1. This policy seeks to retain the existing uses of ground floor units and restricts their conversion to residential unless it can satisfy two criteria set in the policy. These criteria relate to the loss of a use which is surplus to current or foreseen future requirements and that the premises have been advertised for a period of six months. The principle aim of this policy is to maintain the vitality and viability of the town centre. The supporting paragraph also discusses bringing forward sites for future retail development including the current fire station site.

Great Dunmow

2.32 Retailing in Great Dunmow town centre is dealt with by Policy GD1. It looks at the change of use of buildings within the town centre to other uses and the instances in which they may be permitted.

2.33 Great Dunmow policy GD2 identifies a site of 0.75 Hectares to the rear of 37-75 High Street which is considered suitable for a mixed use scheme.

2.34 To the rear of the Co Op car park, there is a further vacant plot which is being promoted by the Plan for additional car parking. Policy GD3 identifies the area as owned by the Council.

Stansted Mountfitchet

2.35 Retailing in Stansted Mountfitchet is dealt with by Policy SM1 'Local centres'. The policy looks at the town centre and in particular seeks to restrain the conversion of ground floor town centre uses to other uses. In instances where the change of use would be acceptable, two criteria must be met. The existing use must be surplus to current or foreseen future requirements and the property must have been advertised for a period of six months.

Thaxted

2.36 Retailing in Thaxted is dealt with by Thaxted Local Policy 1 'Local centres'. The policy looks at the town centre and in particular seeks to restrain the loss of ground floor town centre uses to other uses. The loss of the use would be acceptable provided it meets the two same criteria discussed above for Stansted Mountfitchet.

3.0 REVIEW OF EXISTING SHOPPING PROVISION

3.1 An assessment of the District's centres has been undertaken to identify the physical make-up of the centres in terms of convenience, comparison, service and other town centre uses. This will ensure that the unique characteristics and personality of the towns are taken into account when formulating recommendations. The most recent survey of shopping floorspace in the district was undertaken in 2000. We have therefore undertaken our own floorspace survey.

The Study Area

3.2 Uttlesford District Council's administrative area is characterised by a settlement pattern of small towns and villages set within a rural area. The two main towns within the district are Saffron Walden and Great Dunmow. Other towns are Thaxted and Stansted Mountfitchet. Outside these market towns, retailing is very limited and people rely heavily on the market towns to meet their daily shopping needs. Stansted Airport also provides a significant retail element. The significance of this is discussed later in this chapter.

3.3 All of the towns within the district are of considerable historical interest and much of their historic townscapes are preserved, making them pleasant environments to live, work and shop. However, due to the close proximity of larger towns such as Cambridge, Bishop's Stortford, Braintree, Chelmsford and of Harlow to some extent, growth has been restricted.

Saffron Walden

3.4 Located in the north of the district approximately 4 miles south east of junction 9 of the M11, Saffron Walden is the largest town within the district. It is described as being one of the finest examples of a market town in the East of England and recognised for its high environmental quality. The town itself is charming with pleasant shopping streets, open spaces and numerous historical buildings which is demonstrated by the number of tourists it attracts. The majority of the uses within the town centre are accommodated within nineteenth and twentieth century buildings and older listed buildings.

3.5 Identified by the Local Plan as being the most important shopping centre within the District, Saffron Walden offers the greatest range of shops and retail floorspace within the district. The core of the shopping centre is situated within and along King Street, Market Place, George Street, High Street and Hill Street. Market Place has a high concentration of banks and building societies with national retailers dotted along King Street and High Street. The main national retailers in Saffron Walden include Woolworths, New Look, WH Smiths, Boots, Country Casuals and Superdrug.

3.6 The centre's primary function is to provide shopping and services to the population within the northern part of the District. The limited number of national retailers would suggest that although the centre would have a large catchment area, shoppers visit competing centres such as Cambridge for a greater choice of durable goods. This results in a catchment area which is again hindered by its close proximity to larger competing centres offering a far greater provision of shopping facilities.

3.7 The presence of a town centre Waitrose and an edge-of-town Tesco would suggest that unlike some other towns in the district, Saffron Walden town centre is used for weekly convenience shopping and not just grocery top up shopping. Saffron Walden also offers limited durable goods shopping and is also well known for its specialist shopping. The following table sets out the breakdown of shopping floorspace in the centre derived from the Goad Town Centre report which is included at **Appendix 1.**

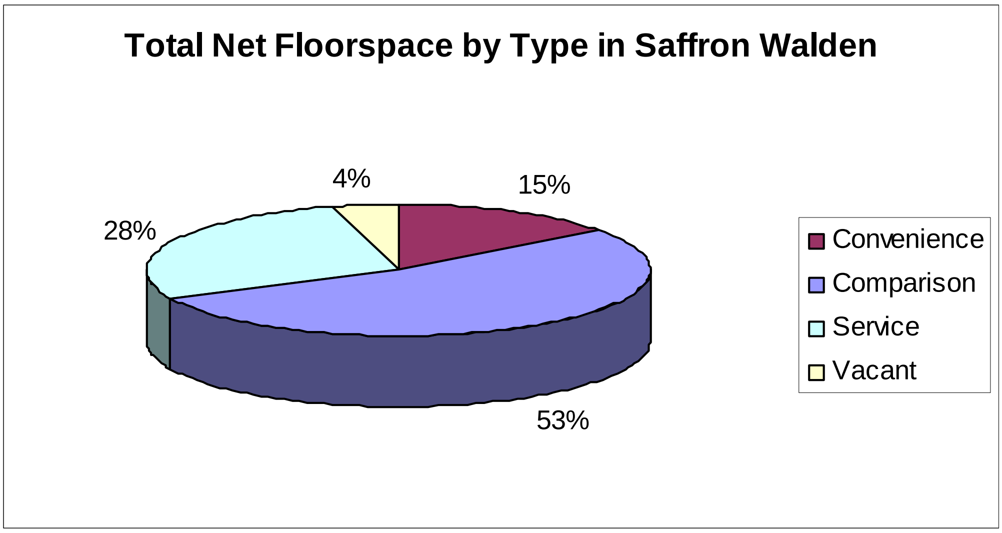
Figure 1

Retail Composition

Retail Trade Group	Number of Outlets	Gross Floorspace	Net Floorspace	% of Total Net Floorspace
Convenience	14	3250	2437	15
Comparison	104	11710	8782	53
Service	57	6130	4597	28
Vacant	12	930	697	4
Totals	187	22020	16513	100

Although there have been a number of changes since the survey was carried out in February 2005, the overall floorspace figures have not changed significantly.

Figure 2



3.8 Figure 1 and Figure 2 identify the retail composition of Saffron Walden town centre. It identifies the centre as having 187 outlets which equate to approximately 16,513 sq m net of shopping floorspace. Vacancy levels within the town centre are also considerably less then the national average. Of the total floorspace within Saffron Walden town centre, only 697 sq m net (4.22%) is vacant, compared against a national average of almost 8%. Convenience and comparison related floorspace occupy 2,437 sq m net (14.76%) and 8,782 sq m net (53.18%) respectively. These figures are generally consistent with the national average and suggest a healthy town centre. Saffron Walden also has over 4,597 sq m net of service floorspace. This figure is slightly above the national average.

Convenience Shopping

3.9 Convenience shopping in the centre is adequate for a centre of this size. There are a number of butchers, bakers and newsagents dotted around within the centre. The bulk of convenience shopping is provided by the Waitrose supermarket of 1,470 sq m net which integrates well with the town centre. Other shopping retailers include wine merchants, health foods and grocers shops. There is also a street market which takes places in the town centre two times a week on Tuesdays and Saturdays. The market offers a wide selection of goods including fresh fruit and vegetables.

Comparison Shopping

3.10 The centre provides a good mix of multiple and independent retailers although there is a lack of national retailers relative to high order centres. The shopping provides a number of specialist shops, pharmacies, homewear and soft furnishings, antique furniture, Dixons electrical, independent home entertainment, IT shops, Bathroom and Kitchens, clothing stores, jewellery shops, hardware, florists, charity shops, shoe shops and bookshops. The majority of these stores are independently owned although there is some limited national retailer representation. One of the main stores is an Eaden Lilley department store which operates from two floors at the Market Place.

3.11 The centre has average good range of service shops in comparison with the national average including public houses, restaurants, takeaways and property and professional services, health and beauty shops.

3.12 The bulk of the parking is provided by five car parks of which four are pay and display. A private car park above the Waitrose supermarket is also a pay and display although Waitrose customers do get their first hour reimbursed if they spend over £10.00.

3.13 Due to the large number of small villages relying on Saffron Walden for their shopping needs, car usage in this centre is likely to be high. The town centre does suffer from congestion, particularly on the High Street throughout the day and throughout the centre at peak times. Congestion is amplified by the physical make up of the town centre (carriage widths and junction geometry) and the reliance of smaller centres and rural villages on Saffron Walden.

3.14 Limited public transport infrastructure is provided in the form of bus stops. However, the reliance on the private vehicle to access the centre is evident by the congestion within this centre.

Waitrose

3.15 Situated within the town centre to the rear of the shops on Hill Street, this store is accessible either directly from the car park or through an alley from Hill Street. The store's primary function is to provide weekly shopping rather than grocery top-up shopping, although it will perform both functions. The store is located adjacent to a car park that provides approximately 250 car parking spaces for the town centre as well as Waitrose shoppers. The store has a sales area floorspace of 1,470 sq m and has 15 checkouts including four express checkouts of which two are combined with tobacco kiosks. It also offers shoppers a range of food products associated with a store of this size including fresh fish, meats, cheese, pastries, salad bar, meat centre and a delicatessen section. The store also offers a large wine section offering a wide selection of wines and alcohol.

Tesco Supermarket

3.16 Located in an edge of town location just outside Saffron Walden, this store has a sales area floorspace of 2,359 sq m, a 389 space car park and a petrol filling station. There are 16 checkouts and only a small proportion of floorspace is devoted to non-food. The store is open 24 hours a day and offers a wide selection of foods including meat and fish counters as well as a café.

Ridgeons

3.17 Ridgeons Building Merchants is located within the Ashdon Road commercial centre on the eastern edge of the built up area of Saffron Walden. The store is open to the public and offers shoppers a range of DIY products including building, painting and decorating, plumbing, ironmongery, timber, kitchens, bathrooms, floor and wall tiles, hire equipment and hand and power tools amongst others. We estimate that the store has a net sales area of approximately 2,100 sq m as well as further sales areas for building trade professionals.

Homebase

3.18 Located outside the town centre in close proximity to a residential area, this Homebase is approximately 1452 sq m in size and only has 4 checkouts including a information desk / checkout which is used at busy periods. The store offers a relatively small selection of bulky goods typical of a store of this size. Products include wall paper, timber, tools and equipment. The store has a very small garden centre but no other departments such as kitchens or beds which are found in larger Homebase stores.

Great Dunmow

3.19 Located in the south of the district on the A120 between Bishop's Stortford and Braintree, Great Dunmow is the second largest settlement within Uttlesford and the focal point in the south eastern part of the district. The Local Plan also defines the centre as being a "town centre".

3.20 Great Dunmow has a large foodstore (Co Op) as well a large Tesco superstore in an out of town location just off Stortford Road. The centre is situated along the High Street between the junctions of Market Place and Chelmsford Road. It also offers shoppers a far greater choice of goods than Stansted Mountfitchet or

Thaxted and comprises of approximately 90 retail units including a good range of shopping provision with some national retailers being represented.

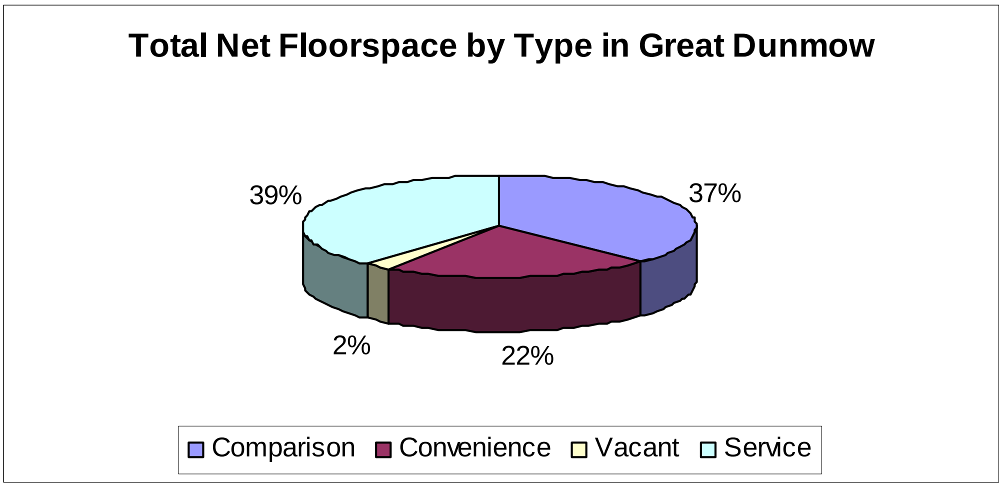
3.21 The centre's primary function is to provide a service to the local population of Great Dunmow and small rural villages beyond. The extremely limited presence of national retailers would suggest a fairly limited catchment area. This catchment area is constrained by the close proximity of both Saffron Walden, Bishop's Stortford and Chelmsford, which limits the growth potential of the centre.

Figure 3

Retail Composition

Retail Trade Group	Number of Outlets	Gross Floorspace	Net Floorspace	% of Net Total Floorspace
Comparison	36	3539	2608	37
Convenience	9	2387	1565	22
Vacant	2	218	152	2
Service	41	4297	2699	38
Totals	88	10440	7025	100

Figure 4



3.22 Figure 3 and Figure 4 identify the retail composition of Great Dunmow town centre. The centre has 88 outlets which equate to approximately 7,025 sq m of net shopping floorspace. Vacancy levels within the town centre are also considerably less then the national average reflected by only 152 sq m net (2%) vacant floorspace, compared against a national average of almost 8%. Convenience and comparison related floorspace occupy 1,565 sq m (22%) and 2,608 sq m (37%) respectively. Convenience shopping in the centre is 5% higher than the national average which is fairly consistent. However, the comparison floorspace is over 16% less than the national average reflecting its relatively low position in the shopping hierarchy. The town also has over 2,699 sq m net of service floorspace. This figure is almost double the national average.

3.23 The main car park for the centre is provided at the Co Op supermarket which is a pay and display car park although people using the Co Op claim back one hours parking when spending over £5.00. Additional car parking is available in other pay and display car parks and to the rear of some of the shops.

3.24 Due to the large number of small villages relying on Great Dunmow for their shopping need, car usage to this centre appears to be high. At the time of survey, the Co Op car park was extremely busy.

Convenience Shopping

3.25 There is adequate provision of convenience shopping services in the centre mainly provided in the form of a Co Op supermarket of which approximately 20% is non-food. This store also provided a limited range of white goods including washing machines and microwaves. Other shopping services includes butchers, bakers, newsagents, wine merchants and grocers. Great Dunmow also offers its shoppers a weekly street market in the town centre selling a selection of goods including fresh fruit and vegetables. The market takes place once a week on Tuesdays.

Comparison Shopping

3.26 Comparison shopping within the centre is limited and is provided in the form of pharmacies, an art gallery, jewellery shops, furniture, household goods/ hardware, florists, charity shops, shoe shops, electrical store, clothing stores, bookshops, outdoor equipment, kitchens and bathrooms and photographic studios as well as others. The vast majority of these stores are independently owned although a national retailer was present through a franchised Clark's Shoes store.

3.27 The centre has a good range of services within it and this is reflected by a large number of public houses, restaurants, takeaways, property and professional services, health and beauty shops.

Tesco Supermarket

3.28 Located in an edge of town location just outside Great Dunmow, this store serves the population of Great Dunmow and the surrounding rural area. The store itself has a sales area floorspace of 2,330 sq m, a 378 space car park and a petrol filling station. There are 24 checkouts and approximately 10% of the floorspace is non-food. The store is open 24 hours a day and offers a wide selection of foods including a café, meats, fish and a deli section as well as a photo processing lab.

Stansted Mountfitchet

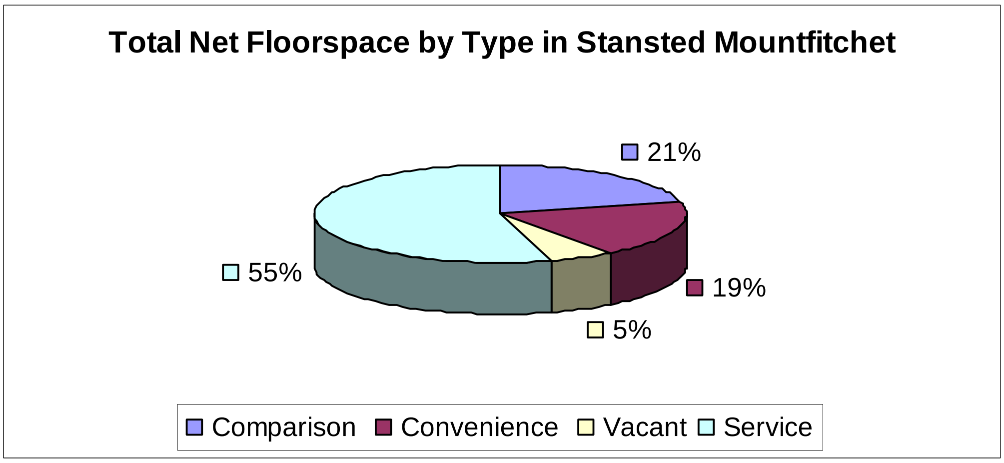
3.29 Located in the west of the district and north west of junction 8 of the M11, Stansted Mountfitchet is the third largest settlement and is identified by the adopted Local Plan as being a 'local service centre'. The shopping is provided in the form of two separate areas at Cambridge Road and Lower Street. The general appearance of the centre is good with the vast majority of shop frontages neat and tidy although there are some with a dated appearance. The overall function and growth of the centre is limited by its close proximity to Bishop's Stortford which results in a limited choice of shopping.

Figure 5

Retail Composition

Retail Trade Group	Number of Outlets	Gross Floorspace	Net Floorspace	% of Net Total Floorspace
Convenience	10	766	526	19
Comparison	8	777	567	21
Vacant	2	149	149	5
Service	22	2496	1486	54
Totals	42	4189	2728	100

Figure 6



3.30 Figure 5 and Figure 6 identify the retail composition of Stansted Mountfitchet town centre. The centre has 42 outlets which equates to approximately 2,728 sq m net of shopping floorspace. Vacancy levels within the town centre are low. Of the total floorspace within Stansted Mountfitchet's centres, only 149 sq m net (5%) is vacant. This is well below the national average. Convenience and comparison related floorspace occupy 526 sq m (19%) and 267 sq m (21%) respectively. Convenience floorspace is generally consistent with the national average, however, comparison floorspace is considerably lower. Café and restaurants dominate the service floorspace reflecting the close proximity of Mountfitchet Castle which is a tourist attraction.

Cambridge Road

3.31 Cambridge Road shopping area consists of 15 units which offer shoppers a limited choice of retailing. The centre consists mainly of small independently owned shops along Cambridge Road. The centres primary role is to provide retailing services to the surrounding residential area although there are a number of furniture shops and auctioneers offering a service which would attract people from a much wider catchment. There are currently two vacancies within the centre.

3.32 Car parking within this centre is available at Crafton Green pay and display car parks and Chapel Hill car parks and is supplemented by limited on street car parking. The latter provides shoppers with free time restricted parking. There is public transport available for the users of this centre. There are bus stops along Cambridge Road and Chapel Hill, however, the reliance on the car is heavy with car parking spaces very limited.

Convenience Shopping

3.33 Convenience shopping in the centre is provided in the form of a Co Op supermarket and a Night & Day convenience store located within the Total Petrol Station shop. Other convenience shopping within the centre include a bakery and wine merchants. There is also a Budgens supermarket located within a petrol filling station to the north of Cambridge Road, however, this is not within the designated primary shopping area.

Comparison Shopping

3.34 Comparison shopping within the centre again is very limited and is provided by two furniture and carpet stores and a PC shop located on the first floor at the rear of the shopping frontage.

3.35 The remaining uses within the local centre provide a service role such as antique furniture auctioneers, banks and professional property and legal services amongst others.

Co Op

3.36 Located within the designated centre this foodstore offers a large selection of foodstuffs to the surrounding population for mainly grocery top ups. The store has a large refrigerated section offering a large variety of foods. There are two checkouts and usage of the store at the time of survey seemed to be high.

Budgens

3.37 Located to the north and outside the Cambridge Road local centre, this small Budgens convenience store in located within a busy petrol station on Cambridge Road. The store offers a large selection of foodstuffs with approximately 85% of the floorspace dedicated to convenience shopping. The store offers typical foods associated with a store of this size as well as a large refrigerated area for frozen products. This store would principally be used for grocery top up shopping only. It also has two checkouts, ten dedicated car parking spaces in the forecourt as well as a cash point.

Lower Street

3.38 Lower Street offers a greater shopping function to that of Cambridge Road. It offers shoppers a much greater variety of shops and consists of some 28 units. These offer shoppers a range of retailing choice ranging from day to day use attracting people from a immediate local area such as newsagents, grocers, pharmacies, restaurants, laundrettes, public houses to more specialist shops such as diving equipment shops and antiques and furniture restoration. Again the shops consist mainly of small independently owned shops offering a local service although the specialist shops would again have a greater catchment area and attract people from a much wider area than Stansted Mountfitchet. There is currently one vacancy within the centre.

Convenience Shopping

3.39 Convenience shopping in the centre takes the form of a small mini market, newsagents and a grocers offering limited top up shopping only. Unlike at

Cambridge Road (Co Op supermarket) it has no national retailer representation. Other convenience shopping within the centre include a bakery and a butchers. The centre only provides a grocery top up role and shoppers would have to go to the Co Op or Budgens at Cambridge Road to have access to a greater variety of foodstuffs.

Comparison Shopping

3.40 Comparison shopping within the centre again is again very limited and is provided by specialist stores offering customers antiques and furniture restorations and a small mirror shop. These are likely to attract people from a wider area than just the convenience shopping element provided by centre.

Thaxted

3.41 Located in the centre of the district in a predominately rural area, Thaxted is identified in the local plan as being a key rural settlement and an important local centre. The centre is situated on the B184 road which runs from Great Dunmow to Saffron Walden and is surrounded by residential properties both along the main shopping street and off it.

3.42 The centre is a historic town centre with a strong tourism industry attracted by historic features such as St John the Baptist's Church and the windmill amongst others. The role of the centre is therefore one which caters for this with traditional tea rooms, cafes, restaurants, small hotels and street markets all adding to the rural charm of the area as well as catering for the needs of the local population.

3.43 The centre consists of clusters of shops scattered at irregular intervals along the road with residential buildings in between them. The core shopping area of this centre is focused on and around Town Street. The centre offers a wide variety of retail uses including a post office, pharmacy, butchers/ bakers, restaurants, cafes, takeaways, hair and beauty, furniture, art gallery, gift shop, public houses and a watch and clock shop. The centre primary function is to provide a service to the local population of Thaxted as well as tourists. There are some exceptions to this, as the watch / clock shop and antique furniture shops would attract people from much further afield.

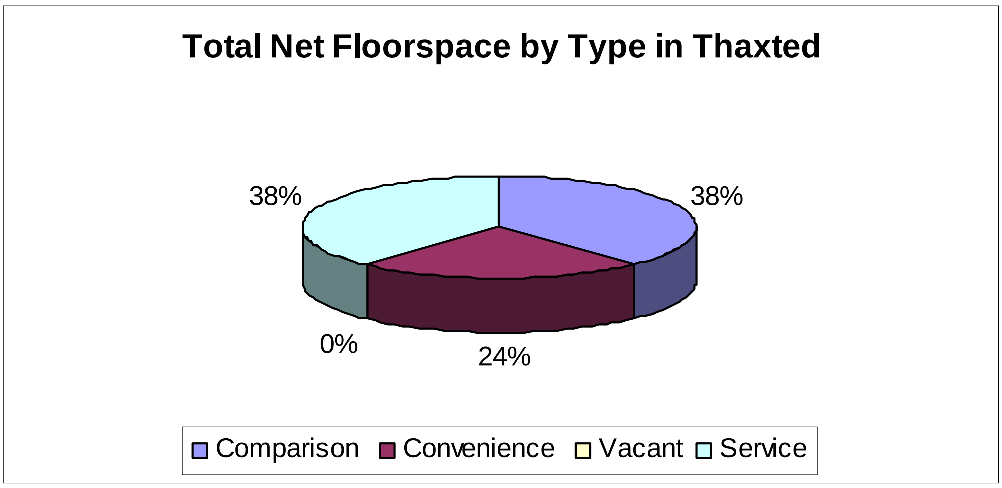
3.44 There are no national retailers represented within this centre and all the shops, restaurants and hotels are independently owned. The general appearance of the centre is good with the vast majority of shop frontages neat and tidy and in keeping with the traditional character of the surrounding area.

Figure 7

Retail Composition

Retail Trade Group	Number of Outlets	Gross Floorspace	Net Floorspace	% of Net Total Floorspace
Convenience	4	469	371	24
Comparison	11	880	602	38
Vacant	0	0	0	0
Service	9	1092	605	38
Totals	19	2440	1578	100

Figure 8



3.45 The above Figures (7 and 8) identify the retail composition of Thaxted centre. They identify the centre as having 19 outlets which equate to approximately 1,578 sq m net of shopping floorspace. There is a zero percent vacancy rate suggesting a very healthy centre. Convenience and comparison related floorspace occupy 469 sq m (24%) and 880 sq m (38%) respectively.

3.46 Although the centre is within easy waking distance for many shoppers (due to the surrounding residential area), reliance on the private vehicle is high. This was evident by the lack of available car parking. Additional car parking is provided outside the designated centre on Park Street and Margaret Street.

Convenience Shopping

3.47 Convenience shopping in the centre is limited and provided in the form of a newsagents, grocers, butchers, bakers and a post office. There is no large foodstore in the centre. The limited convenience retailing would suggest that this centre would only attract local people from the immediately surrounding area for grocery top up shopping only. Thaxted has a small street market which takes places every Friday.

Comparison Shopping

3.48 Comparison shopping within the centre again is again limited and is provided by a art gallery, clock and watch shop, furniture sales and restoration, pharmacy, household goods, hardware, florists and a charity shop. All these stores are independently owned. The variety of retailers suggest a good assortment of comparison retail shopping for a centre of this size which is likely to attract an element of tourist trade.

3.49 The centre also has a number of services including restaurants, takeaways and health and beauty shops within the centre. These cater for both the local population and the tourism trade.

Stansted Airport

3.50 Located to the west of the district, Stansted Airport provides a significant amount of shopping floorspace. The airport has two distinct shopping areas. The first is the standard shopping area within the main terminal building (which consists of 15 retail units) and the second is the duty free shopping (consisting of 24 retail units) which is only available once passengers have checked in and passed the security areas.

3.51 There are a number of multiple convenience and comparison retailers located within the main terminal. They include Boots, WH Smiths, Accessorize, The Body Shop, Tie Rack and Corals amongst others. Clearly, the customer profile for these stores will be related to passengers using the airport. The stores are not convenient for use by residents of the District as a destination in themselves. The trading pattern and capacity for additional for additional retail floorspace will be closely related to the use of the airport itself. This issue is beyond the scope of this study and the trade and additional retail turnover of the airport has therefore been excluded from our quantitative analysis.

Retailer Requirements

3.52 As part of this study we have not undertaken a detailed analysis of retailer requirements in the District. However, based on our knowledge of retailer requirements generally we would expect demand from multiple retail operators to be very limited. Saffron Walden has a limited number of multiple stores but in terms of catchment population falls below the threshold required to support most multiple retailers including mainstream fashion stores. Throughout the period covered by this assessment there may be some limited increase in demand from multiple operators, for example in the DIY sector. However, such specific changes in requirements are difficult to predict. In other smaller towns demand from multiples is likely to remain very limited, particularly in terms of non-food requirements. In these towns we would expect a modest increase in demand from multiples in the food and service sectors. Again, however, specific changes in retailer requirements are difficult to predict.

4.0 QUANTITATIVE ASSESSMENT

4.1 This section comprises an assessment of the proposals against the key retail policy tests set out in the Development Plan and national guidance. This includes an assessment of both the quantitative and qualitative 'need' for the development.

4.2 In order to assess the quantitative need for the development a retail capacity assessment has been undertaken for the district. The project brief requires assessment of the need for both convenience and comparison floorspace. We have therefore undertaken separate assessments for each sector. The tables relating to the comparison goods element are included at **Appendix 2**. and the tables relating to the convenience goods assessment are included at **Appendix 3**.

4.3 It should be noted that the project brief requires an assessment of floorspace requirements in the period to 2020. However, PPS6 suggests that need should normally be assessed no more than five years ahead. Our forecasts to 2013 and 2018 should therefore be treated with a high degree of caution and used as a general guide only.

4.4 The assessments are based on the following key steps:

1. Define an appropriate catchment area and the zones within it.
2. Apply expenditure per head estimates to population estimates to determine the total available expenditure on comparison goods and convenience goods in the catchment area.
3. Determine existing and committed convenience/comparison goods floorspace provision in the catchment area and apply average turnover rates to determine the "benchmark" turnover of existing and committed provision.
4. Compare the available expenditure to actual turnover of existing and committed provision to assess retention rates within the zones.
5. Assess the potential to increase market penetration in the catchment area through claw-back of expenditure and hence the level of potential surplus expenditure.

6. Apply average turnover to floorspace ratios to the identified surplus to determine levels of supportable floorspace

Catchment Area

4.5 The catchment area used for the assessment is shown on the plan at **Appendix 4.** The district boundary provides a reasonable basis for the assessment and this has been divided into four zones based around the four main centres in the District. Zone 1 relates to what we consider is the primary catchment area of Saffron Walden. Zones 2, 3 and 4 relate to Thaxted, Stansted Mountfitchet and Great Dunmow respectively.

4.6 We consider these zones represent a reasonable "natural" catchment areas for the relevant centres. Given the relatively low position of the District's centres in the shopping hierarchy, there is likely to be significant leakage from the district. However, given the proximity of centres in neighbouring districts we would not expect any of the centres to draw a significant proportion of their trade from beyond the district boundary.

Comparison Goods Assessment

Population and Expenditure

4.7 We have used our in-house Experian Retail Planner package to produce estimates of retail expenditure per head and population for each of the four catchment area zones. The expenditure estimates take account of the socio economic characteristics of the catchment population. The expenditure and demographic reports for each zone are included at **Appendix 5** and relevant data extracted from these reports is included in the quantitative assessment tables.

4.8 The population data included in Table 1 shows a total population for the District in 2001 of just over 69,000 of which 30947 is within Zone 1 (Saffron Walden) and 24,578 in Zone 4 (Great Dunmow). Zones 2 (Thaxted) and 3 (Stansted Mountfitchet) have relatively small populations of 3,099 and 10,574 respectively. The Experian package also provides projections of population for the Zones to 2008 and 2013. We have extrapolated these projections to 2018. The projections indicate an increase in population in each zone and indicate that the total population of the district will rise to almost 78,000 by 2018.

4.9 The comparison goods expenditure per head estimates shown in Table 2 show little variation between the four zones. The Experian Retail Planer reports indicate that comparison goods expenditure in each Zone is between 5% and 9% above the national average reflecting the relatively affluent nature of the catchment population. We have applied a growth rate of 4.2% pa to the base expenditure estimates to derive forecasts of expenditure per head in each zone to 2018. The growth rate is derived from the recently published Mapinfo / Oxford Economic Forecasting Brief 05/02.

4.10 Combining the population and expenditure per head data gives a total comparison goods spending power of £190.14m in 2001 rising to £311.30m by 2018. As can be seen from Table 4 this indicates growth of £43.22m in the period 2003 – 2008 and £121.16m in the period 2003 to 2013.

Benchmark Turnover of Existing Stores

4.11 In Table 5 we have estimated the benchmark turnover of existing stores in the District by applying an “average” turnover to floorspace ratio to the existing floorspace. For Saffron Walden town centre we have used data from the Goad Town Centre report. For other centres we have used our own floorspace survey information as described in the previous section. Information supplied by Goad indicates a total comparison goods floorspace in Saffron Walden of 11,710 sq m gross. Applying a gross to net ratio of 75% indicates a total net sales area for the town centre of 8,197 sq m. Applying a typical turnover ratio of £3,500 gives a total turnover of £28.69m.

4.12 A similar process has been adopted for other centres in the district to derive the total turnover of centres in the District. This gives a total turnover of £45.61m for stores in the District in 2003.

Baseline Trading Position

4.13 Table 5 illustrates the baseline comparison goods trading position in 2003. We have established that residents of the area generated a total of £190.14m in comparison goods expenditure in 2003. However, only £45.61m (24%) of this is retained by existing shops suggesting high levels of leakage to stores elsewhere or overtrading in existing shops. The level of retention ranges from only 6% in Stansted Mountfitchet Zone to 40% in the Saffron Walden Zone.

4.14 Given the predominantly rural nature of the catchment such a low level of retention is to be expected. There will inevitably be a large degree of expenditure leakage to stores and higher order centres elsewhere such as Bishop Stortford and Cambridge.

Projections of Expenditure Potential within Zones

4.15 In Table 7 we have forecast the level of comparison goods expenditure which could be available to support floorspace within each zone over the period to 2018. These projections are based on the assumption that the overall level of expenditure retention will not change over time. We consider this is a reasonable approach to take in the particular circumstances of Uttlesford where there is unlikely to be any prospect of centres within the district enhancing their position in the shopping hierarchy relative to larger competing stores and centres.

4.16 However, even without assuming any change in expenditure retention there are still likely to be significant increases in available expenditure, particularly in the Saffron Walden and Great Dunmow zones. Not all the growth in expenditure will be available to support new floorspace. Some will be absorbed by increased efficiency of existing floorspace. We have made an allowance for existing floorspace to increase its efficiency by 1% per annum.

4.17 In Table 8 we have estimated the level of floorspace which the additional expenditure within each zone is likely to support. This assessment suggests that an additional 8,747 sq m gross could be supported by 2013 in Saffron Walden and a further 1,943 sq m gross in Great Dunmow. However, in our view these estimates should be treated as maximum figures. Whether sufficient expenditure is retained in each zone to support this level of floorspace will be highly dependent upon the intentions and requirements of the main multiple operators. If such operators are not attracted to centres in Uttlesford it is unlikely that levels of expenditure retention could be achieved such that these levels of floorspace could be supported.

Convenience Goods Assessment

4.18 This assessment follows the conventional methodology as set out above and assesses the capacity for additional convenience goods floorspace on the basis of the following potential sources of turnover.

- Expenditure growth as a result of changing population and expenditure per head
- Diverting any "overtrading" relative to company average levels from existing stores
- Clawback of expenditure which is currently spent in competing stores and centres

4.19 In the case of Uttlesford we have not identified any issue in terms of overtrading at existing stores which might in itself indicate a need for additional floorspace in the District. In particular, the major supermarkets in Saffron Walden and Great Dunmow appear to be capable of accommodating their existing levels of trade without affecting customer comfort. This view was supported by the Inspector at the inquiry into proposals to extend the Tesco store in Saffron Walden in 2000.

Study Area Population

4.20 We have adopted the same expenditure zones for the convenience goods assessment as for the comparison goods assessment and the relevant population estimates and forecasts are shown in Table 1 of **Appendix 3.**

Available Expenditure

4.21 Applying Experian expenditure data for the study area indicates total convenience goods spending in the area of about £114m in 2003 rising to £126m by 2013.

4.22 Table 4 indicates growth of about £6m in the study area as a whole between 2003 and 2008 and £12.24m between 2003 and 2013. This level of growth is well below that identified from the comparison goods sector reflecting the lower projected expenditure per head growth.

Baseline Turnover of Existing Stores 2003

4.23 As with the comparison goods assessment we have estimated the turnover of convenience goods floorspace in each of the catchment area zones at a base date of 2003. For the Tesco stores in Saffron Walden and Great Dunmow we have adopted company average turnover levels and taken account of evidence submitted in relation to the proposed extension of the Saffron Walden store in 2000. This assessment indicates that convenience goods floorspace in the district as a whole was achieving a total turnover of £80.35m in 2003.

Baseline Trading Pattern 2003

4.24 In Table 6 we have calculated the levels of convenience goods expenditure retention within each of the catchment area zones. This has been done by comparing the level of available expenditure with the total turnover of stores within each zone. This shows relatively high retention levels in Saffron Walden and Great Dunmow and low levels in Thaxted and Stansted Mountfitchet. Overall the analysis indicated that the district as a whole is retaining 70% of convenience goods expenditure. This is significantly higher than for the comparison goods sector. However, we would expect a higher degree of self containment in terms of convenience goods shopping trips.

Capacity for Additional Convenience Goods Floorspace

4.25 Our calculation of the potential for additional convenience goods floorspace capacity in the catchment area is shown in Table 7.

4.26 The 2008, 2013 and 2018 columns indicates the potential for additional floorspace on that year taking account of any growth in expenditure, increased retention and diversion of overtrading in existing stores.

4.27 In considering the potential to increase market share in the study area zones by the provision of further floorspace in Uttlesford we have taken account of existing market share levels and the location of the zones relative to competing provision.

4.28 Our assessment indicates that both Saffron Walden and Great Dunmow achieve relatively high levels of expenditure retention indicating they are relatively well provided for. Given the relatively high levels of retention we consider there is no significant scope to support additional floorspace on the basis of a higher level of retention in either zone. Our forecasts have therefore been made on the basis of a constant market share maintained in the period to 2018.

4.29 Taking account of the increase in expenditure levels alone indicates there could be a surplus of over £4m by 2008 which would support about 700 sq m gross of additional floorspace. By 2013 there will be an additional £8m available which would support approximately 1,381 sq m gross of additional floorspace.

5.0 SEQUENTIAL SITES ASSESSMENT

5.1 PPG6 advises that where a need has been identified a sequential approach should be adopted to identifying potential sites for development. Our quantitative assessment has identified a need for additional convenience and comparison goods floorspace in the district. However, the need to accommodate additional floorspace in the districts centres must be balanced against the need to preserve the character of those centres. Saffron Walden has a densely developed central area with many historic buildings. It would be very difficult to accommodate a large amount of additional floorspace in such a centre without adversely affecting the character of the centre, much of which lies within a conservation area.

5.2 Potential sites have been identified in versions of the local plan. The 1995 plan identified three potential sites at the White Horse, the Fire Station and at Emson Close. None of these have been developed since then. The current local plan also identifies the fire station site to the Fairycroft Road car park as a potential retail site. In our view all these sites could be potentially suitable for retail development. However, all the sites would have limited physical capacity and any decision to allocate a site within the emerging LDF is likely to be based upon other non-retail issues such as urban design and traffic management.

5.3 Great Dunmow is a small, historic centre which also has very limited potential for physical expansion. In the current local plan a 0.75 ha site is identified to the rear of High Street including an element of commercial development. There is a current application in the same area – the White Street development which includes 270 sq m of new retail development. This development will go some way to accommodating the identified floorspace requirements for the Great Dunmow zone but the centre has little physical potential for further development in addition to this.

5.4 Both Thaxted and Stansted Mountfitchet have very limited catchment populations and there is unlikely to be significant development pressure in either centre for additional retail floorspace. We do not consider it necessary or appropriate to identify potential retail sites in either centre although there may be limited potential to develop infill sites which would help to maintain the vitality and viability of each centre.

6.0 SUMMARY AND CONCLUSIONS

6.1 The study brief requires assessment of retailing in the district on both a qualitative and quantitative basis. Our qualitative assessment indicated that the main centres are all healthy. They have preserved much of their historic townscape which makes them pleasant environments in which to live, work and shop. They serve many functions associated with towns of their size, such as shopping, leisure, business and services. All three centres appear to be trading well with a relatively low vacancy rate.

6.2 The greatest barrier to the growth of the towns within the District is the proximity of neighbouring higher order centres such as Cambridge and Bishop's Stortford. With regard to current market shares of existing expenditure, there appears to be large leakages from the District's towns, especially comparison retailing.

6.3 Our research shows that the District generated approximately £190m in comparison goods expenditure in 2003 of which only £45.61m was retained. This implies 76% of the District's spending power is lost to other centres. The retention levels also vary greatly between centres with Saffron Walden and Stansted Mountfitchet retaining 40% and 6% respectively. Given the predominantly rural nature of the catchment, a low retention is somewhat expected and it may not be realistic to plan forward on the basis of an increased level of expenditure retention within the District.

6.4 With regards to convenience goods expenditure, the District as a whole retains in the region of 70%. There is high retention levels in both Saffron Walden and Great Dunmow however, as expected the level of retention by Stansted Mountfitchet and Thaxted are considerably less. Again, it may not be realistic to plan forward on the basis of retaining a higher proportion of spending than this.

6.5 Our analysis indicates there is capacity for approximately 8,700 sq m gross of additional comparison goods floorspace capacity in Saffron Walden by 2013 and a further 1,900 sq m gross in Great Dunmow.

6.6 In terms of convenience goods the figures are more modest. In the District as a whole we estimate there will be a requirement for approximately a further 1,400 sq m gross by 2013.

6.7 A key issue for the District will be the ability to accommodate the levels of projected floorspace that have been identified. All existing centres appear to have limited physical potential for expansion. A number of sites have been identified in the town centres in the past but very little development has taken place in recent years. Further efforts are likely to be required to bring forward some of these sites if the position of centres in the district relative to centres elsewhere is to be maintained.