



# Tendring District Council

## Retail Study

**May 2016**

## Final Report

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## 1.0 Introduction

### Instruction

- 1.01 WYG Planning (hereafter 'WYG') was commissioned by Tendring District Council ('the Council') in April 2015 to undertake an updated Retail Study for Tendring. The Study replaces the previous 2006 North Essex Authorities Retail Study and 2010 Retail Study Update and forms part of the evidence base informing the production of the new Tendring District Local Plan.
- 1.02 A key purpose of this Study is to provide an assessment of retail capacity in the period to 2032, and to review the current performance of Major Town and Town Centres across the District. This is of particular importance given recent fluctuations in the UK economy which have had a notable impact on many town centres and the retail sector in general.
- 1.03 The Council is preparing a new Local Plan with recent consultation on Issue and Options Stages. The new Local Plan will guide future development in Tendring area to 2032. The aims and objectives for this Study therefore include consideration of the following:
- Provide an up-to-date analysis of retail and town centre policy at the national level to set the context for the review of the compliance of draft policies on such matters within the emerging Local Plan for Tendring;
  - Describe the current and emerging national and local economic trends and emerging shifts in retail spending. Examine the implications of the trends for Tendring up to 2032, with particular regard to the 2010 Retail Study's population expenditure estimates;
  - Present a health check (NPPG 005) on the function, classification and vitality and viability of the District's centres. As well as health checks, this assessment will include a review of any potentially suitable development opportunity that conform to the sequential test to site selection;
  - Produce convenience and comparison retail expenditure floorspace capacity projections for the period to 2032 and provide an assessment of quantitative and qualitative need for additional retail uses;

- If there is an identified need for additional floorspace, provide a qualitative review of existing, committed and proposed developments, sites and opportunities in line with NPPF and NPPG, which will be capable of withstanding scrutiny if allocated through the Local Plan; and
- In consideration of all the above and consultation with key stakeholders, make recommendations for a retail strategy (NPPF paragraph 23 and NPPG paragraph 003) for Tendring District Council. This will entail a thorough review of the emerging Local Plan and any recommendations for revisions or additional policies on the basis of updates to the evidence base and national policy guidance as well as overall conclusions and recommendations based on each item above.

- 1.04 Given the above requirements, it is envisaged that the Study will act as the evidence base to assist in the formulation of future development plan policy, as well as providing baseline information to assist in the determination of planning applications for retail development.
- 1.05 In addition to considerable work “in the field” to determine the current health of all defined centres, the Study also draws upon new empirical research, with NEMS Market Research Limited (NEMS) undertaking surveys of 1,000 households within a defined Sub Region Study Area in May 2015. The Sub Region Study Area for the household survey comprises seven zones which are based on postcode sectors grouped to reflect areas which are likely to exhibit similar patterns of shopping behaviour. The Study is informed by a comprehensive survey of existing operators within the district and examines the existing published data sources, such as Experian Goad, Verdict, Mintel, Venuescore and StorePoint. The Study also draws upon the population data provided by the Council in December 2015 and the latest Experian population forecast and expenditure data in order to establish the up-to-date position with regard to both convenience and comparison goods capacity.

### Structure of Report

- 1.06 Our report is structured as follows:
- Section 2 provides a context for the Retail Study by providing an analysis of key retail trends;
  - Section 3 considers the up-to-date position in respect of relevant national, regional and local retail planning policy;



- Section 4 presents the key findings in respect of household survey research;
- Section 5 sets out an overview of the vitality and viability of Tendring's town centres;
- Section 6 identifies current and future population and expenditure levels within the Sub Region and Tendring Study Areas;
- Section 7 provides our assessment of the quantitative and qualitative need for further convenience and comparison goods retail floorspace over the assessment period; and
- Section 8 sets out our conclusions and recommendations.

## 2.0 Current and Emerging Trends

### Introduction

- 2.01 The retail property landscape across the UK has evolved significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of retail warehouse parks and out-of-town regional shopping malls. For most of this period, the retail and leisure sectors have experienced considerable expenditure growth, which has been attributed to a number of factors, including greater disposable income, availability of credit, new technology and a general overall increase in our standard of living. However, recent economic conditions have had a clear impact on expenditure and convenience goods spending per capita has actually reduced in recent years. The way in which goods are purchased has also altered due to the increased popularity of 'e-tailing', which now claims more than one in every ten pounds spent in the UK.
- 2.02 The retail and leisure market and the need for new development continually evolves as a result of numerous factors including demographics, consumer demands, car ownership, planning policy and technological advancements. The share of retail spending has undergone a significant shift in the decade since 2002, with Verdict identifying that town centre spending as a proportion of overall spending declined from 47.7% to 39.9% at 2012. In contrast, spending in out of centre locations has increased over the same period by 2.1% and non-store locations (principally internet retailers) by 6.6%<sup>1</sup>. These changes have had a major impact on the format and location of retail and leisure floorspace, which has led to recent Governments reaffirming their commitment to the 'town centre first' policy approach that is now outlined in the National Planning Policy Framework (NPPF) (March 2012).

### Current Retail Picture

- 2.03 A 2014 report by Colliers<sup>2</sup> provides information regarding trends, together with forecasts for the future of retailing in the UK. The findings confirm that the retail sector has been significantly affected by the wider economic climate and that there is considerable uncertainty about the strength and durability of future growth. However, Colliers reports that the recent improved economic outlook is beginning to result in increased consumer confidence and pockets of retailer expansion which are resulting in a reduction in vacant retail space. Furthermore, it is evident that the UK unemployment rate is currently falling (recorded as being 5.4% between June and August

<sup>1</sup> 'UK Out of Town Retailing', Verdict Datamonitor, April 2012

<sup>2</sup> 'National Retail Barometer: Summer 2014', Colliers, September 2014



2015 lower than 5.6% between March to May and 6.0% for a year earlier) and that worker's total earnings, including bonuses, were up 3% in June to August 2015 compared to a year earlier.<sup>3</sup>

- 2.04 Notwithstanding these very recent encouraging signs, the economic conditions of the past few years have had a significant impact on the public's ability and willingness to spend their earnings on retail goods. Since 2010 there have also been increases in taxation (for example in VAT, national insurance contributions and capital gains tax) which also impact upon households' spending. Furthermore, in recent years inflation has consistently been at a level beyond average earnings growth and a delay in reviewing business rates has been identified by both the Portas<sup>4</sup> and Grimsey<sup>5</sup> Reviews as a key factor affecting the success of many operators.
- 2.05 Recent economic conditions have resulted in significant structural changes to the high street, whereby the pressure on retailers to remain solvent has meant that many are showing increased signs of caution in their investment decisions. In particular, retailers are rationalising their physical store portfolios by reducing their number of stores, abandoning their representation in weaker centres and concentrating on acquiring sites in city centres and major regional shopping centres. The Grimsey Review identified that the national vacancy rate at 2013 equated to over 22,000 empty shops across the top 650 town centres. The Centre for Retail Research<sup>6</sup> estimates that overall store numbers will fall by 61,930 between 2012 and 2018, with the main impact being upon non-food stores. The report also estimates that 316,000 people will become unemployed, permanently or temporarily, as a result of these store closures.
- 2.06 To address this, many retailers have sought to re-negotiate their lease terms with landlords in order to enable them to switch from quarterly rents to monthly agreements, with several high street firms (including Monsoon and New Look) trying to ease the cash flow burden of paying rent three months in advance. Furthermore, some retailers are finding it increasingly difficult to justify being represented in every town in the UK and in less profitable markets. As a consequence, demand has reduced considerably for 'poorer quality premises' in secondary locations and in many smaller towns with a commensurate drop in value (and often rent). Large cities and towns are likely to suffer less compared to smaller centres, given that they provide an enhanced choice for customers and offer the greater retail and leisure 'experience' that consumers increasingly desire.

<sup>3</sup> 'UK Labour Market', ONS, October 2015

<sup>4</sup> 'The Portas Review', December 2011

<sup>5</sup> 'The Grimsey Review – An Alternative Future for the High Street', September 2013

<sup>6</sup> 'Retail Futures 2018', Centre for Retail Research, May 2013



- 2.07 In summary, there has been a marked polarisation and divergence in retailer spending, characterised by diminishing demand for secondary premises in smaller peripheral centres and increasing interest for well located and appropriately configured floorspace in key centres. It is evident that whilst Central London, regional city centres and regional shopping malls are relatively stable, a significant number of small and medium sized towns which serve a localised catchment may need to implement innovative ideas in order to compete for expenditure and reduce trade leakage.
- 2.08 In terms of retail rental values, Colliers<sup>7</sup> notes that national rates increased by 1.4% in prime retail rents across the UK in the year to the end of May 2015. However, excluding London, the prime rents have decreased on average by 0.3% during the corresponding period. This shows that aside from London, rental growth remains very muted. However, there is a growing stabilisation of rents which indicates that there may be a modest rental growth in the future.
- 2.09 Given current spending patterns and the wider uncertain economic climate, it is unsurprising that Experian, which monitors and forecasts retail consumer expenditure in the UK, has in recent years identified significant changes when reviewing its forecast growth rates for both convenience and comparison goods expenditure over the short term. Experian's<sup>8</sup> forecast annual per capita convenience goods growth rate is -0.2% at 2015, +0.1% at 2016 and +0.3% at 2017. By way of contrast, Experian<sup>9</sup> forecast in 2009 that per capita convenience goods growth would equate to +0.8% to 0.9% per annum across these same three reporting years.
- 2.10 However, Experian's forecast annual per capita comparison goods growth rates are significantly more positive than in the recent years and are similar to those recorded prior to the recession. Experian identifies per capita growth of +5.3% at 2015, +3.2% at 2016 and +2.9% at 2017.
- 2.11 Despite difficulties in recent years across the comparison goods sector, certain types of retail have continued to perform well. The market for recreational goods has, on the whole, performed strongly in recent years, with healthy growth attributed to supermarket sales together with the

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<sup>7</sup> 'Midsummer Retail Report 2015: New Frontiers', Colliers, July 2015

<sup>8</sup> Experian Retail Planner Briefing Note 13 (Figure 1a), October 2015

<sup>9</sup> Experian Retail Planner Briefing Note 7.1 (Figure 1), August 2009

growing popularity of online shopping, which continues to see an increase in sales year-on-year. However, the manner in which such purchases are made has changed considerably, with the increasing popularity of the internet to purchase books and music having a notable impact on the composition of town centres. Other businesses have experienced growth in the last two years, with the Grimsey Review<sup>10</sup> reporting a 12% increase (equating to an additional 1,100 stores) in 'value-related retailing' outlets, including second-hand, discount and charity shops. The Grimsey Review also makes reference to the expansion of pawnbrokers, pay-day lenders and betting shops which have collectively experienced a 17% growth in the number of such outlets since 2011.

### Trends in Comparison Goods Retailing

- 2.12 Whilst it is not anticipated that growth in retail spending over the next ten years will mirror that achieved after the turn of the millennium, there is expected to be some growth in comparison goods expenditure in coming years. Consequently, there is an increasing focus from retailers on achieving more efficient use of their floorspace, particularly given the recent poor performance of certain national multiples, many of which have been affected by the significant increase in e-tailing and increases in rental levels secured before 2008. As a result of the current economic climate, retailers are more reluctant to commit to new development than they have been in previous decades. Instead, they are more selective and are holding out for accommodation that is appropriate both in terms of location and the type of premises provided. Indeed, retailers are seeking to occupy larger units in order to achieve more efficient use of floorspace and attract shoppers from a wider area. These larger floor plates enable operators to provide a greater range of goods; for example, in 2011, when the retail market was generally stagnant, Primark opened one million sq.ft of new retail space.
- 2.13 International market conditions and price deflation in some key sectors have also meant that many high street names are becoming increasingly vulnerable to takeover. This is being pursued through disposals, company voluntary administrations (CVAs), informal arrangements with landlords, lease expiries and break options. More generally, whilst there is likely to be continued demand for larger, modern retail units in the future, increased sensitivity over future viability will mean a cautious approach to new investment for many key national retailers. Marginal locations within centres will increasingly be rejected. Many national retailers, who would have previously considered smaller/lower order centres in order to increase their market share, are now assessing their future

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<sup>10</sup> 'The Grimsey Review – An Alternative Future for the High Street', September 2013

strategies. Consequently, many investment decisions will be influenced by the scale of commitment from other retailers; developers will increasingly need to promote large town centre redevelopment schemes with anchor tenants if they are to attract other high quality retailers.

### Trends in Food Retailing

- 2.14 In the aftermath of the growth in the number of edge and out of centre large format supermarkets during the 1990s, development of such facilities is now more limited due to stricter planning laws (following the publication of PPS4 and, subsequently, the NPPF) and a lack of suitable sites. As a result, the national multiples in the food retailing sector are finding a range of other measures to improve their market share. These include:
- Offering a wider product range, such as financial and insurance products, petrol and non-food goods;
  - Developing a wide range of retail models, for example small-format convenience stores in town centres (e.g. Sainsbury's Local, Tesco Express), smaller supermarkets mostly in town centres (e.g. Tesco Metro), superstores (e.g. Tesco) and hypermarkets (e.g. Tesco Extra, Asda Supercentres);
  - Extended opening hours;
  - Offering cheap products and no-frills service;
  - Providing an attractive and powerful brand image; Offering a home delivery service; and
  - Offering click and collect service.
- 2.15 Mintel<sup>11</sup> identifies that the recession – allied with a period of higher inflation – has had an impact on consumer behaviour and the wider dynamics of grocery retailing. Price, or specifically value, is now identified as the key issue for consumers, and more shoppers are assessing whether purchases represent value for money. Shoppers now realise that they are able to 'trade down' and switch to own-label ranges or to discount retailers to save money without sacrificing on quality. Indeed, customers are mixing value and premium in the same basket. It is noted that as weekly food budgets fall and consumers alter their shopping habits, growth will be limited and the battle for market share will intensify further. Winning a share of consumer spend will require more than low prices, with shoppers increasingly seeking to source high-quality, good value food.

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<sup>11</sup> 'Food & Drink Retailing', Mintel, March 2013

- 2.16 The changing UK demographics are also having a major impact on the food and grocery sector. For example, there has been a rise in single occupancy young professional households who are 'time poor' and relatively 'cash rich'. Though their baskets might be small, they tend to buy higher value items, therefore providing an opportunity to boost volume and value growth. Elsewhere, an ageing population profile is leading to a rise in time rich consumers who are likely to make more frequent small trips rather than do large weekly shops. The contrasting requirements of these markets means that retailers are seeking to open a variety of stores with a particular current focus on discount and small convenience stores.
- 2.17 Verdict<sup>12</sup> estimates that the food and grocery sector was worth an £139.5 billion in 2014, equating to an annual growth of 2.8%. The four key supermarket chains in the UK have respective market shares of 27.2% (Tesco), 16.3% (Asda), 15.3% (Sainsbury's) and 9.4% (Morrisons). National multiple retailers, which also include operators such as Co-operative Food (5.1%), Waitrose (4.0%), Aldi (4.2%), Lidl (2.0%), Iceland (1.8%) and Waitrose (4.0%), represent a total grocery market share of 89.1%.
- 2.18 There has been a recent slowdown in the growth plans of the majority of the principal supermarket operators. Tesco, for example, indicated in April 2013 that it had scrapped plans for major store developments on more than 100 sites and would instead focus on developing medium size units. It then subsequently announced in January 2015 its intention to pull out of a further 49 store development and to close 43 existing stores.
- 2.19 Asda is the second largest supermarket retailer in the UK, with more than 550 stores nationwide. In contrast to Tesco's plans, it announced in February 2015 its intention to invest £600m opening 17 new supermarkets and revamping 62 more. It also intends to open a further number of petrol filling stations and develop locations where shoppers can pick up groceries ordered online. Asda's focus for additional openings is believed to be London and the south of England.
- 2.20 Morrisons also intends to open fewer larger stores once its current pipeline of development is completed. Its recent focus has been on developing the small-scale M Local convenience format store, which has significantly fewer stores than either Tesco Express or Sainsbury's Local.

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<sup>12</sup> Figure 48 of 'UK Food & Grocery – Verdict Sector Report', Verdict, October 2014

However, the retailer posted disappointing results for the year to 1 February 2015 and announced the agreed sell-off of 140 M Local Stores in September 2015 for a £30 million loss. The retailer also confirmed in September 2015 the closure of 11 of its supermarkets.

- 2.21 Sainsbury's announced in October 2014 its intention to further develop the Sainsbury's Local format and to improve its online offering. However, its most significant move is to enter the discount market under the Netto fascia, with Sainsbury's owning a half share in Netto's UK operation. Netto announced the trialling of 15 stores in November 2014 clustered around the M62 corridor between Liverpool and Hull in order to 'test the water'. Two new build openings were announced in March 2015 in Lymm and Hull, which appears to suggest confidence in the venture.
- 2.22 Emboldened by changing convenience goods shopping patterns and significant increases in their market share, Aldi and Lidl have both announced ambitious store opening targets that, if met, will further increase pressure on the 'main four' operators (these being Asda, Morrisons, Sainsbury's and Tesco). Aldi have identified major expansion plans on top of significant store openings in recent years, reflective of its position as the UK's fastest growing food retailer. The retailer announced in August 2015 plans to invest £600m into its UK business with a target for 130 new stores over a two year investment period. Aldi also revealed plans to start trading online from 2016, initially limited to the sale of wine and non-food goods. Lidl similarly revealed plans in November 2015 to open 40-50 stores a year over the forthcoming three year period, revising upwards previous plans for 30-40 store openings a year. The retailer opened 20 new stores in 2014. In order to increase their appeal to customers, discounters increase the space dedicated to fresh produce, new products and continue to improve on service. For example, Lidl promoted its range of fresh bread and also launched a range of French wines to drive footfall to stores<sup>13</sup>.
- 2.23 Verdict also showed that as a result of economy downturn, consumers are more willing to shop around to make their budget stretch further. Levels of loyalty will remain low in the market as 15-24 year old shoppers are generally more tech savvy than older consumers, making them more likely to make use of comparison sites and shop around to ensure that they get value for money.

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<sup>13</sup> 'UK Food & Grocery', Verdict, October 2014.

- 2.24 More generally, the role of supermarkets has continued to develop in recent years, with the large operators now offering a greater diversity of goods and services, via a larger number of formats and locations. Food and non-food sales are also increasingly being driven by large supermarket growth, with half of town centres competing with five or more supermarkets within a two mile radius<sup>14</sup>. Whilst the exact impacts which will arise from the opening of a new supermarket are dependent on local circumstances, BCSC notes that there has been a significant decline in the number of independent food retailers in recent times, including a reduction of 45% between 1996 and 2007 in the number of greengrocers. Over the same time period the market share of total retail sales secured by supermarkets increased from 38% to 42%. Mintel<sup>15</sup> predict that the long term decline in the number of specialist food and drink retailers can be expected to bottom out in coming years, helped by the shift being experienced towards convenience stores.

### Leisure Sector

- 2.25 The daytime and evening leisure sector has undergone a major shift in the last five years, with the reduction in the income levels of consumers having an impact on their ability to spend on these types of discretionary activities and items. After a period of weak growth during the economic recession, Mintel<sup>16</sup> calculate that the value of the UK leisure market has increased by 15.3% between 2010 and 2015, to a total value of £80 billion, with the market showing strong resilience. Despite this growth the benefits of increased revenues for leisure operators have been largely consumed by higher wage and utility costs.
- 2.26 A review of the leisure activity participation and frequency levels indicates that eating and drinking out of the home still remain the most popular activities which people do on a monthly basis, with the cinema the next most popular of the non-food and drink-led activities. Other activities, including going to a theatre, tenpin bowling, attending live sporting events and visiting a zoo are, on average, undertaken less frequently and this is at least in part reflective of their greater average cost. As consumer confidence slowly returns following the economic downturn Mintel forecast that growth in the leisure industry will continue at a rate similar to that achieved over the previous five years.

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<sup>14</sup> 'What Does the Future Hold for Town Centres?', BCSC, September 2011

<sup>15</sup> 'Food and Drink Retailing', Mintel, March 2014.

<sup>16</sup> 'Leisure Review', Mintel, October 2015

- 2.27 The number of leisure centres and swimming pools has increased in the past few years, although with reductions to their sport and leisure funding budgets local authorities are increasingly being required to adopt more commercial approaches. Mintel<sup>17</sup> notes that 33% of adults use a health centre or swimming pool, a reduction from 40% in 2013, although operator data suggests that admissions have remained resilient overall pointing to losses being concentrated around more casual users.
- 2.28 Research by the Leisure Database Company<sup>18</sup> indicates that the private health and fitness sector had a market value of approximately £3.9 billion in March 2012, an increase of 1.5% over the previous twelve month period. Mintel also notes that, whilst only 12% of adults currently use a private health and fitness club, the potential for a further expansion of the market remains strong.
- 2.29 The composition of the private health and fitness sector has experienced great change in recent years with the rise of budget gym operators presenting a challenge to the more long established key players. Mintel<sup>19</sup> indicate that the market has expanded significantly with a shift towards budget operators bringing possibilities for more convenient access and affordability for the customers. Budget operator Pure Gym has expanded to become the market leader both in terms of number of members (520,000) and clubs (99), more than doubling the size of its estate between 2012 and 2013. At the same time Pure Gym's main competitor The Gym has also greatly increased its membership (350,000) and number of clubs (63). David Lloyd Leisure and Virgin Active Group remain the largest 'full service' health club chains with 440,000 and 400,000 members respectively. Mintel have predicted 6% growth for the private sector health and fitness market up to 2018, to reach a value of £2.8 billion in 2020.
- 2.30 In terms of other leisure activities, the cinema sector has struggled over the last five years with falling admissions. Admissions of 158 million in 2014 represented a decline of 8% from that of 2011<sup>20</sup>. With returning consumer confidence and a series of high profile releases scheduled for the coming years, it is expected that the sector will return to growth in 2015. Admission for 2015 are estimated to be 173 million, forecast to rise to 175 million in 2020.<sup>21</sup> Mintel<sup>22</sup> identifies that the eating out market has grown by around 9% between 2013 and 2015, to an estimated £34 billion.

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<sup>17</sup> 'Leisure Centres and Swimming Pools', Mintel, September 2015

<sup>18</sup> 'State of the UK Fitness Industry', The Leisure Database Company, June 2013

<sup>19</sup> 'Health and Fitness Clubs', Mintel, July 2013

<sup>20</sup> 'Cinemas', Mintel, November 2014

<sup>21</sup> 'Cinemas', Mintel, November 2015

<sup>22</sup> 'Eating Out Review', Mintel, June 2015

The sector is recognised as exhibiting resilient performance during the economic downturn as a key area for discretionary spending.

### Office, Residential and Community Use Sector

- 2.31 The Town and Country Planning (General Permitted Development) (England) Order 2015 has resulted in the relaxation of permitted development rights related to the change of use of buildings and land. Amongst other rights, the 2015 Order permits the change of uses of a building and any land within its curtilage from office use to residential use subject to a number of criteria. It is the Government's intention that through the relaxation of permitted development rights in this regard that vacant, underused or failing employment premises will be put back to viability use for residential purposes. Notwithstanding the positive benefits of this change, some concerns have been raised that the changes may result in a downturn in office stock.
- 2.32 As a result of the trends in retailing, with many retailers choosing to rationalise their physical store portfolios by reducing their number of stores and abandoning their representations in weaker centres, there are opportunities for a wider mix of uses to be developed in town centres in order to contribute towards their vitality and viability. Through the introduction of additional residential and office uses in town centres, there is the opportunity to increase the town's centre's walk-in catchment by both residents and workers, thus providing more consumers and more vibrancy to the town centre.
- 2.33 There is a growing need for local planning authorities to think 'beyond retail' when planning for town centres in order to maintain healthy centres within the current retail climate. Such a focus reflects the recommendations provided by the 'Beyond Retail: Redefining the shape and purpose of town centres' report prepared by the Distressed Town Centre Property Task Force, published in November 2013. The report provided a series of recommendations aimed at improving the vibrancy of town centres by providing a focus beyond retail. It has been recognised furthermore in recent years that in order for town centres to remain vital and viable, it is important to increase dwell time and create town centres that are viewed as meeting places for communities. This trend sits alongside the growing cafe culture, with food and drink uses attracting customers to centres as well as physical purchases. An improved mix and variety of uses in the town centre can also assist in creating a more vibrant night time economy.



## Markets

2.34 In recent years there has been an increased focus on the importance of markets in contributing to the health of town centres. The Portas Review (2011) recommended the support for markets as a key element of the High Street, including recommendations for a 'National Market Day' and reducing regulations relating to market trading. The Government's Response 'High Streets at the Heart of our Communities' (March 2012) accepted the recommendations made by Portas in relation to the importance of markets. At the same time, the NPPF specifically refers to markets as part of ensuring the vitality of town centres and states that local planning authorities should retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive. Subsequently in July 2013, the Government published 'The Future of High Streets' which provided details on progress since the Portas Review, which advised that the key to success and securing the long term future of the High Street is for communities to strike the right balance between traditional retail and other uses for high street property including markets, pop up shops, housing, community and social uses, and entertainment and cultural activities. The Government backed and helped to fund the Love Your Local Market campaign, run by the National Association of British Market Authorities with a view to:

- Encourage people to take the first step on the entrepreneurial ladder;
- Support local growth by increasing footfall to local markets and town centres; and
- Encourage the local community to make the most of their local market and town centre.

2.35 As a result of the increased focus on the role of markets in contributing to the strength of town centres, there has been a trend towards local authorities considering the role that the markets within their local authority area play and consideration of the means to improve and capitalise on the contribution markets can make towards the health of centres. There has been a trend towards greater diversification of markets, along with traditional markets, specialist markets are developing, for example, craft or food markets, in addition to temporary markets, such as farmers' markets.

## Out of Centre Development

2.36 Despite the 'town centre first' planning policies which have been adopted by recent Governments, research undertaken by Verdict<sup>23</sup> indicates that between 2007 and 2012, the amount of out of

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<sup>23</sup> 'UK Out of Town Retailing', Verdict Datamonitor, April 2012

centre floorspace increased by 23%. However, in very recent years, Colliers notes that the demand for out of centre representation has been limited, with those retailers seeking to acquire stores having a pick of vacant stock which has been made available through the administration of MFI (in November 2008), Land of Leather (in January 2009) and Focus DIY (in May 2011), Comet (November 2012) and JJB Sports (September 2014), alongside the failure of other retailers with a significant out-of town presence created significant voids in the landscape of retail parks. The Local Data Company<sup>24</sup> reported the national average vacancy rate in out of centre retail warehouses in 2014 to be 8.0%, an increase of around 4.1% from 2012. The flooding of the market with un-let space acted to reduce rents although the vacancies created by recent administrations have now largely been absorbed by new interest from discount retailers such as B&M, Home Bargains and Dunelm alongside familiar high street retailers such as Mothercare, Next Home and TK Maxx<sup>25</sup>. The changing retailer mix at out of town destinations, buoyed by wider planning permissions has provided a more diverse offering within the sector.

- 2.37 Looking forward, Colliers<sup>26</sup> indicates that future out of centre development will fall into two main categories. The first relates to the adaptation and refurbishment of existing stock. Colliers states that between 80% and 90% of the retail warehousing stock that the UK requires to service demand has already been built. Accordingly, most development activity will see landlords seeking to improve the suitability of their property for the latest retailers and also make improvements to improve dwell time on retail parks (for example, by seeking to introduce coffee shops and restaurants). Older schemes may be remodelled or redeveloped to meet current needs. According to Colliers, the other main strand of out of centre retail development relates to opportunities in areas where there has not been a great deal of retail warehousing in the past.

### Shopping Centre Development

- 2.38 Shopping centre retail development has been at a virtual standstill in recent years, but there are a few signs that a corner may about to be turned. Cushman & Wakefield<sup>27</sup> reports that development activity was restrained in 2014, with an estimated 124,300 sq.m of shopping centre space added over the course of the year, which is less than half the total added in 2013. Cushman & Wakefield indicates that the shopping centre development pipeline for 2015 totals 154,618 sq.m and includes the 51,100 sq.m Westfield Bradford and the 27,870 sq.m Friars Walk in Newport, both of which are

<sup>24</sup> 'Vacancy Report Summary H2 2014', Local Data Company, February 2015

<sup>25</sup> 'Midsummer Retail Report 2014: Coming up for Air', Colliers July 2014

<sup>26</sup> 'Midsummer Retail Report 2014: Coming Up for Air', Colliers, July 2014

<sup>27</sup> 'Marketbeat Shopping Centre Development Report', Cushman & Wakefield, September 2014

scheduled to open in Autumn 2015. It is anticipated that next year will see the delivery of several shopping extensions, including Birmingham's Grand Central centre, which when complete, will nearly double its size to 53,000 sq.m. Cushman & Wakefield forecasts that the shopping centre pipeline will pick up significantly from 2017 as the economic recovery and the greater availability of finance help to bring forward new schemes and extensions that already have planning permission.

- 2.39 Notwithstanding this, the viability of shopping centre retail development remains, for the moment, challenging no matter how well designed or well located a scheme is. There are three types of scheme which have a better chance of success in the current economic climate. The first of these will be where a town has a large, affluent catchment and an acknowledged undersupply of retail floorspace in both town centre and out-of-town locations. The second scenario relates to schemes which were very close to happening before the recession took hold, which may be revised to better meet the current needs of the market. Barnsley, Macclesfield, Bradford and Lichfield are examples of such schemes. The third opportunity relates to development where the key anchor is a foodstore and, as a result, demand has remained strong. However, due to changes in the food retail sector and the trading model of the 'main four' operators, opportunities in this latter category are more difficult to come by.
- 2.40 In addition to retail, food and drink is becoming an integral part of many shopping centres. In particular, consumers are increasingly travelling to larger centres to use the leisure facilities and experience more of a complete 'day out'. In the past, it was relatively typical for non-retail uses to occupy less than 10% of shopping centre floorspace, but this has increased in recent schemes, including Westfield in Stratford where catering and leisure units occupy over 20% of the space.

### Growth in E-tailing ('E-commerce')/Click and Collect

- 2.41 Many consumers who previously shopped in town centres and at retail parks are now increasingly using the internet to make purchases. Experian<sup>28</sup> identifies that internet sales' share of total retail sales stood at 11.7% in mid-2015 compared to just 4.7% at June 2008. The value of internet sales in 2015 is estimated at £42.1 billion.

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<sup>28</sup> Experian Retail Planner Briefing Note 13, October 2015

- 2.42 The rise in recent years of e-commerce has had a major impact upon retailers, developers and investors alike, with the top 10 e-retailers in 2012 including Amazon UK (16%), Shop Direct (5%) and Next (4%)<sup>29</sup>. As access to the internet/online shopping continues to grow through digital televisions, tablets and mobile phones, proportionally less money is anticipated to be spent on the high street or at retail parks.
- 2.43 The growth in internet as a sales medium has been enabled by the increase in access to the internet by households, which the Office for National Statistics<sup>30</sup> reports increased from 35% at 2006 to 78% in 2015. A total of 22.5 million households in Great Britain now have internet access. The proportion of households with access to the internet is expected to increase further over the coming years, alongside the growth in mobile phone and tablets with access via the new 4G spectrum. The ONS states that access to the internet using a mobile phone is nearly doubled between 2011 and 2015, from 36% to 66%. This has supported the strong growth recorded, together with improved consumer confidence in the security of online payment, deliveries and heavy demand for expensive electrical products available online. The option of using the internet to 'click and collect' in-store at a dedicated counter is also increasing in popularity (particularly within stores with large sales areas), with the service now accounting for around a fifth of John Lewis internet orders.
- 2.44 As a consequence of such changes, the Office for National Statistics<sup>31</sup> indicates that the number of people using the internet to purchase goods continues to rise, with 76% of the UK population purchasing products over the internet in 2015, compared to 53% in 2008. The most popular online purchases were clothes/sports goods, with 55% of all adults in the UK purchasing some items via the internet. In addition, 44% of the population bought household goods online and 23% bought food or groceries.
- 2.45 Online spending continues to be the key growth opportunity for national and independent retailers, accounting for increasing proportions of total sales. For example, online sales at Next in 2011 accounted for 44% of operating profit and 32% of group sales. With regard to foodstore operators, food accounts for 20.5% of all internet sales, which equates to 3.1% of all food retailing<sup>32</sup>. Verdict's research identifies that, with the exception of Morrisons (though it is currently

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<sup>29</sup> Ibid

<sup>30</sup> 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2015

<sup>31</sup> Ibid

<sup>32</sup> 'Shop Expansion and the Internet', CBRE, May 2012

in the process of establishing an online presence via Ocado), major retailers have seen their business grow as online shopping has increased and, as a result, the likes of Asda and Sainsbury's have improved their geographical coverage and capacity. In particular, online sales at Tesco currently exceed £2 billion, with Colliers noting that the operator has a reported 48% online grocery market share.

- 2.46 It is evident that internet shopping as a whole is having an impact upon traditional high streets, in light of increased competition and lower prices. Consequently, there is a possibility that online retailing will continue to put some pressure on retail rental growth over the next five to ten years. In particular, it appears likely that smaller town centres (which may be less able to offer a complete 'shopping experience') are likely to be the subject of greater ongoing impacts from online retailing.
- 2.47 Despite some variance in the estimated future growth of online shopping, it is clear that e-tailing cannot entirely replace the 'shopping experience' as shopping is a social activity. In this regard, retailers are already adopting innovative approaches to encourage people to visit their store through 'try before you buy' concepts. For example, Ellis Bingham has installed Vertical Chill indoor ice climbing walls at five stores for customers to try equipment and to interact with products. For successful retailers, online selling provides an additional route to the market. Online retailers benefit from demand generated through physical channels whilst high street outlets can benefit from reaching a wider customer base through the internet. Those retailers who are likely to have a healthy future are those who are able to combine a strong high street presence with an interesting and closely related e-tail offer.

### Digital High Street

- 2.48 Growing internet and mobile commerce enable the growth of 'click and collect' service in stores. The convenience of browsing and comparing a wide selection of products 24/7 offered by PCs and more recently on smartphones and tablets is creating new forms of consumer behaviour. Retailers innovate and explore the omni-channel offer and to embrace both click and collect service and showroom stores.<sup>33</sup>

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<sup>33</sup> High Street Performance and Evolution, Professor Neil Wrigley & Dr Dionysia Lambiri, July 2014

### Users Perceptions of Town Centres and High Streets

- 2.49 Recent research <sup>34</sup>demonstrates that the presence of coffee shops typically boosts local high street economies by 2 to 4% through a combination of increased footfall and dwell time. The result indicates that 58% of the 2,000 consumers surveyed planned to visit coffee shops as part of their trip to the high street.

#### Summary

- 2.50 In summary, it is evident that the retail market has undergone significant changes in recent years. Wider economic conditions facing the UK have led to a marked decline in some previously healthy town centres, as well as other traditional retail formats. This has principally been caused by a decline in available expenditure, due to suppressed disposable incomes and an increase in the proportion of expenditure committed online.
- 2.51 However, 2015 has seen an increase in consumer confidence, mainly driven by an improved economic outlook as a result of falling unemployment and the availability of credit. As a consequence, it is anticipated that expenditure growth rates will increase moving forward. Whilst such forecasts remain below those achieved before the recession, they are significantly higher than those recorded over the last three or four years. The growth in online sales has also impinged on the need for new tangible floorspace. However, increased expenditure growth allied with the retail industry embracement of innovative multi-channelling retail strategies, provides an opportunity for town centres to widen their audience in the future and retain ground. To deliver on this, it will be critical that town centres are flexible enough to both embrace and complement digital solutions, whilst also providing appropriate and well managed retail floorspace that can showcase products and services. The ability for centres to 'move with times' and utilise modern technology, whilst providing a materially different experience to online shopping (partly through the inclusion of leisure and food and drink offers), will help ensure their ongoing vitality and viability.

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<sup>34</sup> Role of Coffee Shops on High Street Report, Allegra Strategies, 2014.

### 3.0 Planning Policy Context

#### Introduction

- 3.01 Given that this Study seeks to provide important evidence to assist in the production of future retail planning policy, it is important to review existing national planning policy of pertinence to retail and town centre matters to explore the context for the Study and how it may impact upon the production of future development plan policy. We also summarise Tendring's adopted and emerging planning policy, insofar as it is relevant to retail and town centre matters, in order to consider the Council's strategy in respect of its centre.

#### National Planning Policy Framework

- 3.02 The National Planning Policy Framework was published on 27<sup>th</sup> March 2012. In March 2014, National Planning Policy Guidance was published in an online format, to replace all the Planning Policy Statements, Planning Policy Guidance Notes and some Circulars in a single consolidated document.
- 3.03 The main theme of the NPPF is that there should be 'a presumption in favour of sustainable development'. In terms of plan-making, it is stated that local planning authorities should positively seek opportunities to meet the development needs of their area, with an emphasis on Local Plans having sufficient flexibility to adapt to rapid change.
- 3.04 In terms of economic development, it is set out within the NPPF's core principles that planning should proactively drive and support economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. It is emphasised that every effort should be made to objectively identify and then meet the business and other development needs of an area, with positive responses made to widen opportunities for growth.
- 3.05 The NPPF stresses the Government's commitment to securing economic growth in order to create jobs and prosperity, with paragraph 17 stating that the planning system should do everything it can to support sustainable economic growth.
- 3.06 Paragraph 19 indicates that planning should operate to encourage and not to act as an impediment to sustainable growth, and that significant weight should be placed on the need to support economic growth through the planning system. The NPPF seeks to ensure that Local Planning

authorities plan proactively to meet the development needs of business and support an economy fit for the 21<sup>st</sup> century.

3.07 The NPPF still recognises the need to promote the vitality and viability of towns and cities through the promotion of competition and growth management during the plan period. Paragraph 23 of the NPPF provides guidance for local planning authorities in drawing up Local Plans, it indicates that they should:

- recognise town centres as the heart of their communities and pursue policies to support their vitality and viability;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centre. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;



- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

- 3.08 Paragraph 23 also indicates that needs for retail, leisure, office and other main town centre uses should be met in full and should not be compromised by limited site availability.
- 3.09 Paragraph 24 requires local planning authorities to adopt a sequential approach to the consideration of planning applications for main town centre uses that are not in an existing centre or in accordance with an up to date Local Plan. The following paragraph 25 indicates that the sequential approach should not apply to applications for small scale rural offices or other small scale development.
- 3.10 Paragraph 26 indicates that Local Planning authorities should require an impact assessment for retail, leisure and office development outside of town centres which 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.
- 3.11 Paragraph 27 indicates that where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on the vitality and viability of a town centre or on existing, planned, committed investment in a centre it should be refused.
- 3.12 The NPPF also recognises that retail activity should still, where possible, be focused in existing town centres. Retail and leisure proposals which cannot be accommodated in or adjacent to the town centre will have to satisfy a dual impact test and the sequential test.

### Ensuring the Vitality of Town Centres Planning Practice Guidance

- 3.13 Ensuring the Vitality of Town Centres Planning Practice Guidance was published in March 2014 and replaces the previous Planning for Town Centres Practice Guidance. It provides a more concise summation of how retail and main town centre planning policy is to be applied in practice.
- 3.14 However, the objectives of the Practice Guidance remain comparable with those of its predecessor, with there being a stated requirement for local planning authorities to plan positively and support

town centres to generate local employment, promote competition within and between town centres, and create attractive and diverse places for users.

- 3.15 The Practice Guidance requires local planning authorities to fully assess and plan to meet needs for main town centre uses through the adoption of a 'town centre first' approach. Paragraphs 002 and 003 confirm that this should be delivered through a positive vision or strategy which is communicated through the development plan. The strategy should be facilitated through active engagement with the private sector and other interested organisations (including Portas Pilot organisations, Town Teams and so on). Any strategy should be based on evidence which clarifies the current state of town centres and opportunities to meet development needs and support centres' vitality and viability.
- 3.16 Such strategies should seek to address the following matters:
- the appropriate and realistic role, function and hierarchy of town centres in the area over the plan period, including an audit of the vitality and viability of existing town centres and their ability to accommodate new development;
  - consideration of the vision for the future of each town centre and the most appropriate mix of uses;
  - the assessment of the scale of development that a town centre can accommodate;
  - the timeframe that new retail floorspace can be delivered;
  - what other complementary strategies are necessary or appropriate to enhance the town centre to deliver the vision in the future; and
  - the consideration of the enhancement of car parking provision including charging and enforcement mechanisms.
- 3.17 Paragraph 005 of the Practice Guidance identifies a series of key indicators which are of relevance in assessing the health of a centre over time. Paragraph 005 goes on to state that not all successful town centre regeneration initiatives have been retail led or focused on substantial new development, but have instead involved improvements such as renewed public realm, parking, and accessibility and other partnership mechanisms.
- 3.18 Paragraph 007 identifies the importance of planning for tourism as an important component of any overall vision and indicates that local planning authorities should consider specific tourism needs

(including locational or operational requirements) and opportunities for tourism to support local services, vibrancy and the built environment.

- 3.19 Paragraph 009 reaffirms the town centre first policy in the form of the sequential test, which requires local planning authorities to undertake an assessment of candidate sites' availability, suitability and viability when preparing their local plan. Such an assessment should also consider the scale of future needs and the type of land needed to accommodate main town centre uses.

### **The Portas Review ('An Independent Review into the Future of Our High Streets') and the Government's Response**

- 3.20 The Portas Review was published in December 2011. It is an independent review undertaken by Mary Portas into the state of Britain's high streets and town centres. The review considers the reasons why retail spending on the high street is falling, why there has been a decline of Britain's high streets, and the benefits that can be brought about through the protection of Britain's high streets. Portas puts forward 28 recommendations which include actions that Government, businesses and other organisations should take in order to create diverse, sustainable high streets where retailers can thrive.
- 3.21 The Government published a response to the Portas Review in March 2012. The response acknowledges that in response to the challenges facing the high street, including out-of-centre retail development and online retailing, the high street will have to offer something new and different in order to create a diverse and competitive environment. In its response, the Government accepts a number of recommendations put forward in the Portas Review, including: the implementation of Town Teams (described as visionary, strategic and strong operational management teams for high streets); the provision of funding for pilot areas who are judged to have the best ideas for improving their town centres and high streets; investing in Business Improvement Districts; and support for a new National Market Day. The Government's response seeks to encourage areas to think creatively about how their town centres can be enhanced in order to entice people back, including improvements which could be secured through the redesign of high streets, and the promotion of the evening and night time economy.

### Relaxation of Permitted Development Rights

- 3.22 At a national level, recent changes to the Town and Country Planning (General Permitted Development) Order 1995 have sought to support the diversification and vitality of town centres. The changes follow the Portas Report recommendation to make it easier to change surplus space in order to provide for the effective re-use of buildings.
- 3.23 The Town and Country Planning (General Permitted Development) (Amendment) (England) Order 2013 came into force on 30 May 2013. It provides, for a period of three years, for the change of use of Use Class B1 offices to residential without the need for planning permission. The Order also provides for the temporary change of use (for up to two years) of uses falling within Use Classes A1, A2, A3, A4, A5, B1, D1 and D2 to uses falling within Classes A1, A2, A3 and B1, subject to the use relating to no more than 150 sq m of floorspace and subject to the temporary provision not previously being relied upon. The Order also provides for an increase in the permitted development threshold in respect of extensions to shops, catering, professional or financial services establishments to provide for an additional 50% gross floorspace or 200 sq m (whichever is the lower).
- 3.24 From 6 April 2014, permitted development rights have been further extended to provide for certain additional changes of use without the need for planning permission. The changes come into force under the Town and Country Planning (General Permitted Development) (Amendment and Consequential Provisions) (England) Order 2014 and result in the introduction of two new classifications that affect commercial premises.
- 3.25 The first provides for the change of use of premises and land from Use Class A1 to use as a 'deposit taker' (effectively comprising banks, building societies, credit unions and friendly societies). The second provides for the change of use from Use Classes A1 and A2 to residential. There are certain restrictions as to where and when the rights can be exercised. The intended consequence of such measures is to secure the redevelopment and reuse of premises. However, it is considered that the relaxation in respect of changes of use to residential are more likely to encourage re-use of offices in larger metropolitan areas (particularly in London and the south east) which may benefit from a greater supply of office buildings and where previously there may have been some reluctance to grant planning permission for residential uses.
- 3.26 A further amendment to permitted rights has occurred as a result of the Town and Country Planning (General Permitted Development) (England) Order 2015, which acts to consolidate the

Town and Country Planning (General Permitted Development) Order 1995 and its many amendments.

3.27 The additional permitted development rights of particular relevance to retail and town centre matters include:

- a permitted change from amusement arcade/casino use (sui generis) to residential use (Class C3);
- a permitted change from retail (Class A1) to financial services (Class A2);
- a permitted change from retail/financial services (Class A1/A2) to food and drink (Class A3);
- a permitted change from retail/financial services (Class A1/A2), betting offices, pay day loan shops and casinos to assembly and leisure uses (Class D2);
- extension of the temporary permitted development rights introduced in May 2013 for extensions to shops, offices, industrial and warehouse buildings to support business expansion and the economy so they apply permanently;
- the erection of click and collect facilities within the curtilage of an existing retail shop; and
- modifications to the size of an existing retail shop loading bay.

### Tendring District Local Plan

3.28 The Tendring District Local Plan was adopted in 2007 and provides policies to guide developments in the District up to 2011. The Plan will remain in place and will be used in determining planning applications until they are replaced by new Local Plan which is currently in preparation.

Overarching objectives for the plan period include making efficient use of brownfield land; improving accessibility through reducing need to travel; promoting mixed use development; stimulating regeneration; creating a balanced and healthy rural economy; securing high quality environment through development and ensuring that community, environmental and infrastructure needs are met.

3.29 Local Plan Policy QL1 sets out the spatial strategy for Tendring to 2011. It directs most new development be concentrated at larger urban areas of Clacton, where accessibility to employment, shops, and other facilities and services is maximised. It also identifies scope for limited development for local community needs in smaller towns and villages. Clacton, Harwich, Frinton-on-Sea/Walton, Brightlingsea, Lawford, Manningtree and Mistley, Colchester Fringe are defined as towns according to adopted Policy QL1.

3.30 Policy QL6 identifies the following areas on the Local Plan Proposal Maps as Urban Regeneration Areas:

*"a) Clacton Seafront and Town Centre*

*B i) West Clacton*

*b ii) Jaywick*

*c) Dovercourt Town Centre and adjoining areas*

*d) Harwich*

*e) Walton Seafront and Town Centre*

*f) Brightlingsea Waterfront; and*

*g) Mistley Waterfront and Village.*

*Within these Urban Regeneration Areas permission will be granted for development that reinforces and/or enhances the function, character and appearance of the area and contributes towards regeneration and renewal. In particular, the Urban Regeneration Areas will be the focus for:*

*a) Investment in social, economic and transport infrastructure; and*

*b) Initiatives to improve vitality, environmental quality, social inclusion, economic prospects, education, health, community safety and accessibility."*

3.31 Policy QL8 encourages appropriate mixed use development in town, district and local centres and Urban Regeneration Areas.

3.32 Policy ER31 defines the town centre hierarchy and uses in Tendring as follows: -

<b>Major Town Centre</b>	Clacton-on-Sea
<b>Town Centres</b>	Dovercourt
	Frinton-on-Sea
	Walton-on-the-Naze
	Brightlingsea
	Manningtree
	Harwich
<b>District Centres</b>	Old Road, Clacton
	Great Clacton
	The Triangle, Frinton-on-Sea
	Holland-on-Sea
<b>Local Centres</b>	Upper Dovercourt
	Broadway, Jaywick
	Bockings Elm, Clacton
	High Street, Thorpe-le-Soken
	Clacton and Spring Roads, St Osyth
	Station Road, Alresford
	Clacton Road, Elmstead Market
	Plough Road, Great Bentley
	The Street, Little Clacton

3.33 Policy ER31 states that development proposals which adversely affect the vitality, viability and the urban or rural regeneration objectives associated with each centre will not be permitted. All options in town centres should be thoroughly assessed before edge of centre locations and out of centre sites are considered for town centre uses. The nature and scale of development should reflect the size and role of particular centres including townscapes and retail catchment considerations.

3.34 Policy ER32 states that proposals for town centre uses outside existing town centres will be considered against a sequential site approach and need assessment. A proposal will only be permitted if it satisfies the following matters:

*"a. it is of a scale appropriate to the role and function of the neighbouring centre and its catchment;"*

*b. it does not individually or cumulatively with other committed development materially harm the vitality and viability of an existing centre;*

*c. it is accessible by a choice of means of transport including public transport links; and*

*d. it would not materially prejudice the provision of employment land, housing, recreation or tourism facilities."*

- 3.35 Chapter 8 relates to Clacton-on-Sea. Policy CL7 lists the following potential development sites: Pavilion garage site at the corner of Pallister Road and Colne Road; Land to the rear of foodstore in Colne Road; Land between High Street and Rosemary Road and NCP car park on Jackson Road. An additional retail development site in Clacton is an extension to the Waterglade Centre which is allocated for non-food bulky comparison retail goods and leisure services (Policy CL10). Policy CL12 relates to Clacton Factory Shopping Village and states that unrestricted retail uses in the shopping village will not be permitted. In August 2015, planning permission was granted for a hybrid planning application for the development of the site to provide additional retail and leisure spaces. The full application element includes a part demolition and reconfiguration of North Site floor space (A1/A3/A4/A5 Use) including a replacement unit at Units 23-26 (A1 Use). Reconfigured leisure (A3/A4/A5/D2 Use) site floor space to include cinema (D2) use and restaurant (A3) use. The online permission also allows a development of new retail floor space at South Site.
- 3.36 Chapter 9 relates to Harwich, Dovercourt, Parkeston, Ramsey and Little Oakley. Policy HAR12 states that within the defined Dovercourt Town Centre Regeneration Area, appropriate mixed use development (including residential use) will be encouraged to bring about the repair and restoration of historic buildings. Policy HAR13 which sets out a programme of environmental works to enhance the town centre and railway station; and Policy HAR14 which proposes to relocate the market to a site within the town centre.

### **Tendring District Council Emerging Development Plan Policy**

- 3.37 As the Local Plan was adopted in 2007, some aspects of the Plan are considered to be out of date and not in accordance with the NPPF. The Council had started to prepare a new local plan titled 'Tendring District Local Plan' to replace the adopted plan. A draft version was placed on consultation from November 2012 to January 2013 and a series of changes were placed on public consultation in January 2014.



- 3.38 In relation to town centre and retail matters, the latest policies are contained in the Pre-Submission Focussed Change which was published in Jan 2014. Draft Policy PRO5 sets out the proposed retail hierarchy in the District. It comprises 'major town centre', 'town centre', 'district centre' and 'village centre'. Underneath there are 'existing and proposed neighbourhood centres'. The policy indicates that these centres will be the focus for 'town centre uses' which include retail, leisure, commercial, office, tourism and cultural development and community facilities. The Council will promote a mix of appropriate town centre uses within these defined centres with 'active street frontages' at ground floor level. Proposals must be properly related in their scale and nature having regard to the above hierarchy. The proposed hierarchy is extracted below:

#### Major Town Centre

- Clacton Town Centre

#### Town Centres

- Dovercourt Town Centre
- Harwich Old Town
- Walton-on-the-Naze Town Centre
- Frinton-on-Sea Town Centre, (Connaught Avenue)
- Brightlingsea Town Centre
- Manningtree Town Centre

#### District Centres

- Old Road, Clacton
- Great Clacton
- The Triangle, Frinton-on-Sea
- Frinton Road, Holland-on-Sea

#### Village Centres

- Alresford Village Centre
- Elmstead Market Village Centre
- Great Bentley Village Centre
- Little Clacton Village Centre
- St.Osyth Village Centre
- Thorpe-le-Soken Village Centre

- 3.39 Draft Policy PRO5a states that within Clacton major town centre, only Use Class A1 shops will be permitted at the ground floor commercial premises within the defined Primary Shopping Frontage. Within the other 'town centre', proposals for a change of use from Class A1 (Shops) to Class A2 (Financial and Professional Services) or Class A3 (Restaurants and Cafes) within the defined Primary Shopping Frontage will be permitted where:-

- 'a) A2 and A3 uses would not dominate or detract from the core objective of providing retail outlets for the shopper;*
- b) A2 and A3 uses will not occupy any more than 30% of the total number of shop units along the Primary Shopping Frontage in that town centre;*
- c) there would be no detrimental effect on the amenities of occupiers of nearby residential accommodation in terms of noise, fumes, smell and general activity generated from the use; and*
- d) there would be no unacceptable levels of traffic to the detriment of highway safety.'*

3.40 Within Secondary Frontages, the use of ground floor commercial premises for A1, A2, A3, A4 and A5 use will be permitted subject to the detailed consideration of their impacts against other relevant policies in the Local Plan.

3.41 Draft Policy PRO6 states that retail, leisure and office development outside defined centres will only be permitted if the following requirements could be met.

- 'a) the development has an internal floor area less than 250 square metres; or*
- b) the site is specifically allocated for that use in this Local Plan; or*
- c) the site is allocated for mixed-use development in this Local Plan where retail, leisure or offices of the scale proposed are part of the expected mix; or*
- d) the proposed retail, leisure or office use is ancillary to an established or proposed business that is predominantly within use classes B1, B2 or B8 and would be physically attached to, or incorporated within, the existing business premises; or*
- e) the applicant can demonstrate that there are practical or operational reasons why the development cannot take place within a defined centre and that the proposed location is the only viable option; or*
- f) the applicant can demonstrate that, for the settlement in question, there are no suitable and or available sites or premises within any of its defined centres to accommodate the proposed development. In applying criterion f):*
  - i. the Council will firstly expect the applicant to demonstrate that the floor area of the proposed development cannot be reduced in size and therefore able to be accommodated on or in any suitable and available sites or premises within a defined centre;*
  - ii. if the Council accepts that a reduction in floor area is either not practical or appropriate, or would still not result in suitable or available sites or premises being identified within a defined centre, the Council will consider development utilising a site or premises in an 'edge of centre' location;*

*iii. if the applicant is able to demonstrate that neither suitable or available sites or premises within a defined centre or edge of centre location can be identified for the retail, leisure or office use proposed (always looking to reduce floor areas where practical to use such sites or premises), the Council will consider an out-of-centre location.'*

- 3.42 Policy PRO6 also sets out that an Impact Statement will be required for retail, leisure and office development outside defined centres with an internal floor area of 2,500 sq.m or more .
- 3.43 Section 6 of the draft Local Plan relates to Clacton-on-Sea. Draft Policy COS1 indicates that Clacton town centre and seafront are priority areas for regeneration. Site-specific policies are draft for each of the following sites:
- Creation of a Civic Quarter (Policy COS3);
  - Expansion of Waterglade Retail Park (Policy COS4);
  - Development in Jackson Road (Policy COS6);
  - Rejuvenating the Station Gateway (Policy COS7); and
  - Atlanta Cafe (see Policy COS8)
- 3.44 Similarly, draft policies related to Harwich and Dovercourt are contained in Section 7. Draft Policy HAD1 identified the following sites in Harwich Old Town for regeneration:-
- Mermaid House, the Quay;
  - Miranda House, the Quay;
  - Harbour House, the Quay; and
  - Harwich Station.
- 3.45 In Dovercourt Town Centre and adjoining areas, the following sites are identified by Policy HAD2 for potential mixed use development
- The Starlings Site, High Street;
  - Dovercourt Station, Station Road;
  - Kingsway North, Kingsway;
  - Junction of Orwell Road and High Street;
  - Milton Road Car Park, Bagshaw Road/Bay Road;
  - Land at Junction of Orwell Road and Marine Parade; and
  - Kingsway South, Kingsway.

- 3.46 For Walton-on-the Naze, the following sites are proposed for new development and site specific policies are drafted for each site:-
- Martello Site, Kirby Road (Policy FWK6)
  - Walton Mere, Mill Lane (Policy FWK7); and
  - Station Yard and Avon Works Site, Church Road/Victoria Road, Walton-on-the- Naze (Policy FWK8)
- 3.47 For Manningtree and Brightlingsea, Policy MLM1 and Policy BRI1 relating to the town centre were deleted at the pre-submission draft Local Plan.
- 3.48 A commentary to review compliance of the new local plan policies with the national planning policies and a review of the identified sites are contained in Section 8.
- 3.49 As the 2012 draft Local Plan (as amended by the 2014 Focussed Changes) was heavily criticised for not identifying enough land for housing development, the Council reviewed the housing need target and allocated sites to accommodate the growth. In September 2015, a new 'Issues and Options' consultation document setting out different options for future development in the district was published. The new Local Plan is at a relatively early stage with an aim to publish a 'preferred options' in mid 2016 and final adoption of the Local Plan in 2017.
- 3.50 The Issues and Options document indicates that the Council set a positive vision for Tendring in 2032. In particular, the vision sets out that Tendring's residents will have the opportunity to enjoy a safe and healthy quality of life in communities that offer a range of high quality new housing which meet local needs job opportunities and other important services and facilities, including improved retail provision. The document seeks respondents to provide their view on the proposed vision.

### 4.0 Original Market Research

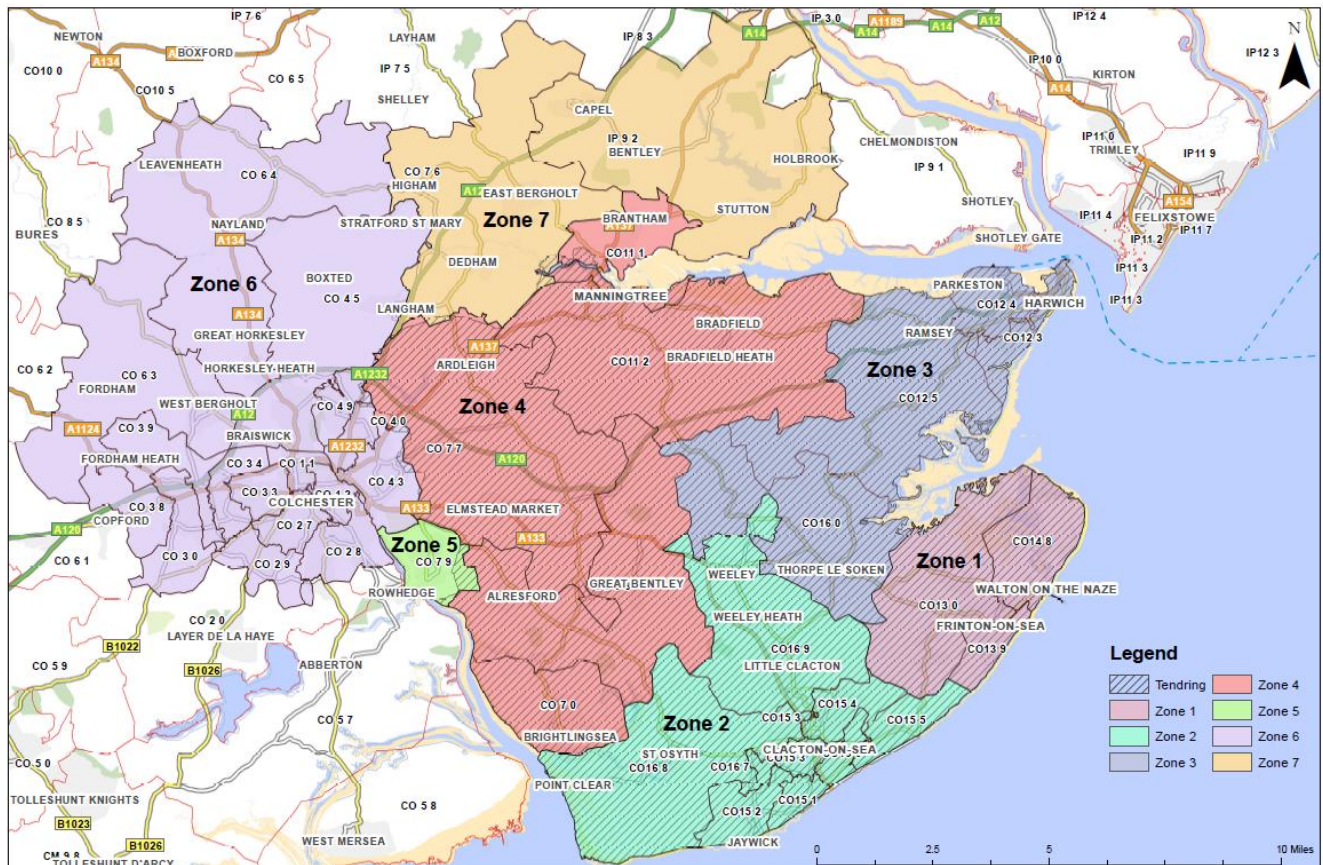
#### Introduction

- 4.01 The undertaking of original market research enables in-depth analysis at a local level and allows the evaluation of the trade draw of particular town centres. The use of specifically commissioned and tailored survey research is fundamental to identifying the likely capacity for future retail floorspace across the Study Area. Notwithstanding this, WYG acknowledges that there can be limitations to survey research, particularly with regard to the sample size which can be achieved, and the results should therefore be taken to be a broad indication of consumer preferences.
- 4.02 A key requirement of this Study is the detailed understanding of shopping patterns in terms of the use of retail centres and the identification of the centres' catchment areas. WYG commissioned specialist market researchers NEMS to undertake a comprehensive household telephone survey to identify consumers' habits and preferences in the Study Area.
- 4.03 We set out the general methodological approach to the survey and key results below.

#### Household Telephone Survey

- 4.04 In May 2015, a survey of 1,000 households was undertaken across the defined Study Area which comprises seven separate Zones this covers an area which includes both Tendring and the wider sub region, and will thereafter be referred to as the Sub Region Study Area. The Sub Region Study Area includes all of the administrative area of Tendring (broadly covered by Zones 1 - 4) and extends into Capel to the north and Colchester to west. The extent of the catchment area is shown in Figure 4.1. For the purposes of this report, we have entitled Zones 1 to 4 as Tendring Study Area to allow a more detailed understanding of the local shopping patterns affecting the district. Any Study Area is not a 'closed' system, but it allows expenditure inflow and outflow to reflect the relative strength of retail facilities as expenditure movement is not limited to administrative boundaries.
- 4.05 Table 4.2 below sets out the postcode sector which comprises each Zone. The questions and full tabulation of results from the household survey are provided at Appendix A.

**Figure 4.1: Sub Region Study Area**



**Table 4.2: Postcodes by Survey Zone**

WYG 2015 Survey Zone	Postcode Sectors	GVA 2005 Survey Zone
Zone 1	CO13 0, CO13 9, CO14 8	Zone 6
Zone 2	CO15 1, CO15 2, CO15 3, CO15 4, CO15 5, CO15 6, CO16 7, CO16 8, CO16 9	Zone 7
Zone 3	CO12 3, CO12 4, CO12 5, CO16 0	Zone 5
Zone 4	CO11 1, CO11 2, CO7 0, CO7 7, CO7 8	Zone 4
Zone 5	CO7 9	Zone 8
Zone 6	CO1 1, CO1 2, CO2 7, CO2 8, CO2 9, CO3 0, CO3 3, CO3 4, CO3 8, CO3 9, CO4 0, CO4 3, CO4 5, CO4 9, CO6 3, CO6 4	Zone 9
Zone 7	CO7 6, IP 2	Part of Zone 3 and beyond





- 4.06 The results of the household survey are utilised to calculate the expenditure claimed by each existing retail facility within the Tendring Study Area, a process which is considered in Section 7 of this report.
- 4.07 The household survey is also of assistance in identifying the market share claimed by specific retail destinations, the frequency of visit to purchase various types of goods, the incidence of linked trips, and the most popular means of accessing town centre facilities, the use of other town centre facilities, and so on.
- 4.08 In considering the market share of trips secured by specific retail destinations, we note that the household survey supporting the previous Retail Study Update (GVA, September 2010) utilised a slightly different methodology. The 2010 Retail Study Update was supported by a 2005 household survey trying to identify the sub-regional shopping pattern in the North Essex area. As a result, the 2005 Study Area covers a wider area and is subdivided into 20 zones to find out the market share of each zone.
- 4.09 In order to allow direct comparison with the findings of two surveys in respect of market share, we divided the 2015 Sub Region Study Area into seven Zones based on the zone boundary of the 2005 Study Area. As shown in Table 1, Zones 1-4 represents the Tendring administrative area which equates to Zones 4-7 of the 2005 Study Area. WYG's Zone 7 covers part of Zone 3 but also includes a new postcode sector of IP9 2 as it is immediately to the north of Manningtree town centre.
- 4.10 In order to compare the 2005 and 2015 survey results on a 'like for like' basis in respect to shopping trips made to tangible stores, we have stripped out any survey responses which suggest that a particular type of purchase was committed through special forms of trading.

### Convenience Shopping Patterns

- 4.11 Tables 4.3a and 4.3b summarise the proportion of the main food and 'top up' shopping trips which are directed to retailers located within Tendring district in the Tendring Study Area, based upon the results of the household survey.
- 4.12 Table 4.3a indicates that foodstores located within Tendring Study Area currently claim a market share of 39.0% of all main food shopping trips which originate inside the Sub Region Study Area (all zones). The most popular foodstores within Tendring include the Morrisons at Centenary Way

(which secures 7.8% of all trips originating with the Sub Region Study Area to undertake the main food shopping), Tesco at Brook Retail Park (7.1%), Morrisons at Waterglade Retail Park (5.8%) and Morrisons at Iconfield Park (5.7%). The Morrisons at Centenary Way and the Morrisons at Waterglade Retail Park both have a high penetration across multiple zones (Zones 1-4 ); however, Morrison's at Harwich secures the single largest market share in Zone 3, with 60.1% of the main food shopping trips being directed to this store.

- 4.13 As would be expected, the food shopping market share secured by facilities within Tendring District is significantly higher (over 95%) in the zones which broadly correlate to the district boundary (namely Zones 1-4). With the exception of Zone 4, each of these zones predominately look to facilities in Tendring to meet their main food shopping.

**Table 4.3a: Principle Main Food Shopping Destinations Trip Analysis by Zone (%)**

			Tendring Study Area				Sub Region Study Area		
Zone	Destination	Total	Zone 1 Frinton & Walton	Zone 2 Clacton	Zone 3 Harwich	Zone 4 Manningtree & Brightlingsea	Zone 5 Wivenhoe	Zone 6 Colchester	Zone 7 Babergh
	Town Centres								
2	Clacton Town Centre*	1.5%	0.8%	5.5%	1.3%	1.0%	0.0%	0.0%	0.0%
2	Sainsbury, High Street Clacton	1.1%	0.8%	4.0%	1.3%	1.0%	0.0%	0.0%	0.0%
1	Frinton-on-Sea Town Centre	0.3%	6.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Harwich Town Centre	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%
3	Dovercourt Town Centre	0.1%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%
4	Brightlingsea Town Centre	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%
4	Manningtree Town Centre	0.1%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	3.3%
1	Walton-on-the-Naze Town Centre	0.4%	7.7%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%
Sub Total		2.4%	14.9%	5.5%	3.4%	2.3%	0.6%	0.0%	0.0%
	Outside Defined Town Centre**								
1	Co-op, The Triangle, Frinton-on-Sea District Centre	1.0%	18.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Centenary Way, Clacton	7.8%	17.6%	28.2%	2.2%	2.3%	0.0%	0.3%	0.0%
2	Tesco, Brook RP	7.1%	24.9%	24.7%	0.8%	1.5%	0.0%	0.0%	0.0%
2	Morrisons, Waterglade RP	5.8%	3.2%	22.4%	4.8%	1.3%	0.0%	0.2%	0.0%
3	Morrisons, Iconfield Park, Garland Road, Harwich	5.7%	1.8%	0.0%	60.1%	7.1%	0.0%	0.0%	0.0%
3	Asda, Main Road, Dovercourt	1.4%	0.0%	0.0%	14.6%	1.6%	0.0%	0.0%	0.0%
3	Lidl Parkestone Road, Harwich	1.0%	0.8%	0.0%	9.2%	2.4%	0.0%	0.0%	0.0%
4	Co-op, Station Road, Brightlingsea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Aldi, Old Road, Clacton	2.7%	4.3%	8.9%	0.8%	4.4%	0.9%	0.0%	0.0%
2	Co-op, Old Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Co-op, Manningtree	0.9%	0.0%	0.0%	0.0%	7.9%	0.0%	0.0%	3.3%
	Other facilities in zone 1-4	3.1%	9.0%	6.2%	0.0%	9.6%	0.0%	0.1%	0.0%
Sub Total		36.6%	80.2%	90.4%	92.5%	38.0%	0.9%	0.6%	3.3%
Tendring Total		39.0%	95.1%	95.9%	95.9%	40.3%	1.5%	0.6%	3.3%

Source: WYG Table 3, Appendix D



Note:

\*figures for Clacton town centre include Sainsbury's on High Street.

\*\* 'outside defined town centre' includes stores in district centres, local centres and out of centre locations.

"Other facilities" outside the above mentioned out of centre facilities in Zones 1 -4 are listed in Table 3 of Appendix D.

- 4.14 With the proximity of Zone 4 to retail facilities in Colchester, the survey result indicated a considerable level of main food shopping trips originating from Zone 4 is being spent at facilities in Colchester. The main draw from Colchester on Zone 4 are Tesco Extra at Highwoods (20.3%), Tesco Superstore at Greenstead Road (Colchester Hythe superstore) (7.2%), Asda at Turner Rise Retail Park (4.6%) and Sainsbury's at Tollgate Road (4.3%). The total amount of main food shopping expenditure from Zone 4 leaving Tendring Study Area equals to £35.5m (i.e. 59.7%).
- 4.15 Top up shopping is often undertaken close to home and, as expected, Clacton claims a very high proportion of such shopping trips which originate in proximity to their shopping facilities. This pattern is replicated elsewhere in the Sub Region Study Area, with a large proportion of top up food shopping trips being undertaken in the zone in which they originate. Table 4.3b shows that facilities in Tendring District area claims 47.2% of all top up food shopping trips originating from within the Sub Region Study Area. Again, Zones 1-3 claims a high market share of over 97% top up shopping trips being undertaken in the zone in which they originate. Some of the larger out of centre foodstores like Tesco at Brook Retail Park in Zone 2 and Morrisons at Harwich in Zone 3 are able to capture a considerable amount of top up shopping. For Zone 4, 32.3% of the top up expenditure were spent outside the Tendring Study Area which equals to a total of £4.2m.

**Table 4.3b: Principle Top up Food Shopping Destinations Trip Analysis by Zone (%)**

			Tendring Study Area				Sub Region Study Area		
Zone	Destination	Total	Zone 1 Frinton & Walton	Zone 2 Clacton	Zone 3 Harwich	Zone 4 Manningtree & Brightlingsea	Zone 5 Wivenhoe	Zone 6 Colchester	Zone 7 Babergh
	Defined Town Centres								
2	Clacton Town Centre	4.2%	1.4%	15.5%	1.0%	1.3%	0.0%	0.5%	0.0%
1	Frinton-on-Sea Town Centre	1.2%	13.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%
3	Harwich Town Centre	0.2%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%
3	Dovercourt Town Centre	1.4%	0.0%	0.0%	15.2%	0.0%	0.0%	0.0%	0.0%
4	Brightlingsea Town Centre	1.1%	0.0%	0.0%	0.0%	10.7%	1.0%	0.0%	0.0%
4	Manningtree Town Centre	0.4%	0.0%	0.8%	0.0%	2.0%	0.0%	0.0%	1.0%
1	Walton-on-the-Naze Town Centre	1.0%	14.3%	0.0%	0.0%	0.0%	1.0%	0.0%	1.4%
Sub Total		9.6%	28.7%	16.3%	18.4%	14.0%	2.0%	1.3%	2.4%
	Outside Defined Town Centres *								
1	Co-op, The Triangle, Frinton-on-Sea District Centre	1.3%	21.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Tesco Express, Holland on Sea	2.0%	0.0%	8.2%	1.0%	0.0%	0.0%	0.0%	0.0%
3	Tesco Express, Thorpe Le Soken	0.8%	2.6%	1.4%	3.2%	0.0%	0.0%	0.0%	0.0%
3	Co-op, Upper Dovercourt	0.6%	0.0%	0.0%	6.0%	0.0%	0.0%	0.0%	0.0%
2	Morrisons, Centenary Way, Clacton	3.3%	4.2%	11.6%	0.0%	0.8%	1.0%	0.5%	0.0%
2	Tesco, Brook RP	5.5%	6.4%	21.0%	2.2%	0.6%	0.0%	0.0%	0.0%
2	Morrisons, Waterglade RP	2.8%	0.0%	12.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Tesco Express, St Osyth Road	1.2%	0.0%	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Aldi, Pier Avenue, Clacton	1.9%	1.0%	6.3%	0.0%	2.2%	2.0%	0.0%	2.6%
2	Co-op, Old Road	0.2%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Morrisons, Iconfield Park, Garland Road, Harwich	3.0%	1.0%	0.0%	23.9%	2.4%	0.0%	1.0%	0.0%
3	Asda, Main Road, Dovercourt	2.8%	0.0%	0.0%	28.2%	1.6%	0.0%	0.0%	0.0%
4	Co-op, Riverside Avenue	1.3%	0.0%	0.0%	0.0%	9.9%	0.0%	0.0%	0.0%
3	One Stop, Dovercourt	0.6%	0.0%	0.0%	6.2%	0.0%	0.0%	0.0%	0.0%
4	Co-op, Brantham	0.9%	0.0%	0.0%	0.0%	7.8%	0.0%	0.0%	1.4%
	Others local facilities in zone 1-4	8.9%	33.1%	15.0%	4.2%	27.2%	0.9%	0.3%	1.7%
Sub Total		37.6%	69.4%	81.5%	78.8%	53.7%	3.9%	1.8%	11.6%
	Total	47.2%	98.1%	97.8%	97.2%	67.7%	5.9%	3.1%	14.0%

Source: WYG Table 3, Appendix D

Note: "Other facilities" outside the above mentioned out of centre facilities in Zones 1 -4 are listed in Table 3 of Appendix D.

\*Outside defined town centre' including district centres, local centres and out of centre locations.

- 4.16 Overall, both the main food shopping and top up shopping market share secured in zones proximate to Tendring are considered to be generally healthy especially in Zones 1 to 3; however, where main food "leakage" to other destinations is apparent mainly found in Zone 4 which is closer to facilities located in Colchester and there could be some scope to improve the main food trade

retention in Zone 4 to be more comparable to that found for top up shopping. Overall there is a total of £43.3m of Tendring convenience expenditure spent outside the Tendring Study Area which equals to 14.4% of the total available Tendring convenience expenditure. A summary table is provided in Table 4.3c indicating the level of retention and leakage by zone.

**Table 4.3c – Level of Convenience Expenditure Retention and Leakage by Zone in Tendring Study Area**

	Tendring Average	Zone 1	Zone 2	Zone 3	Zone 4		Total	Zone 1	Zone 2	Zone 3	Zone 4
	(%)	(%)	(%)	(%)	(%)		(£M)	(£M)	(£M)	(£M)	(£M)
<b>Convenience Market Share - Main Food</b>											
Retail Facilities within Tendring Study Area	84.5%	95.1%	95.9%	95.9%	40.3%		207.6	31.5	110.5	40.5	25.0
Retail Facilities Outside Tendring Study Area	15.5%	4.9%	4.1%	4.1%	59.7%		38.1	1.3	0.1	1.2	35.5
Total	100.0%	100.0%	100.0%	100.0%	100.0%		245.7	32.8	110.6	41.7	60.6
<b>Convenience Market Share - Top Up</b>											
Retail Facilities within Tendring Study Area	90.7%	98.1%	97.8%	97.2%	67.7%		50.9	8.9	22.7	10.5	8.9
Retail Facilities Outside Tendring Study Area	9.3%	1.9%	2.2%	2.8%	32.3%		5.2	0.2	0.5	0.3	4.2
Total	100.0%	100.0%	100.0%	100.0%	100.0%		56.1	9.0	23.2	10.8	13.1
<b>Convenience Market Share - Combined</b>											
Retail Facilities within Tendring Study Area	85.6%	96.4%	99.6%	97.2%	46.0%		258.5	40.3	133.3	51.0	33.9
Retail Facilities Outside Tendring Study Area	14.4%	3.6%	0.4%	2.8%	54.0%		43.3	1.5	0.6	1.5	39.8
Total	100.0%	100.0%	100.0%	100.0%	100.0%		301.8	41.9	133.9	52.4	73.7

Source: Table 3 of Appendix D

4.17 From scrutiny of the household survey results, we also note the following convenience goods shopping trends.

- The four most dominant stores within Tendring cumulatively attract a 26.4% market share of main food shopping trips originating within the Sub Region Study Area. These stores are: Morrison's, Centenary Way (7.8%); Tesco, Brook Retail Park (7.1%); Morrison's, Waterglade Retail Park (5.7%) and, Morrisons, Iconfield Park (5.7%), together these four stores retained 66% of all the main food spend in Tendring Zones;
- Approaching four out of every ten surveyed (38.7%) indicated that the principal reason for choosing their main food shopping destination was the store's proximity to their home,

followed by the fact that the store offers low prices or represents good value (14.7%) and then due to the quality of goods available (5.1%).

- Almost four out of every five shoppers (77.8%) do their main food shop once a week or more frequently, with 12.01% undertaking main food shopping at least once a fortnight and 8.4% doing such shopping on a monthly basis or less frequently.
- Just 5.8% of respondents suggested that their last main food shop was undertaken via the internet.
- A large majority of respondents use the car in travelling to do their main food shop (86.9%), with the next most popular means of transport being by foot (6.8%) and then by bus (2.9%).
- More than half of respondents (64.9%) do not link their main food shopping trip with any other activity, with the most popular activities of those that do being the undertaking of non-food shopping (6.2%), travelling to and from work (5.1%) and undertaking leisure activity (4.3%).
- In terms of top up food shopping, given the relatively extensive reach of the Sub Region Study Area, both town centres and out of centre stores have been identified as attracting top up food shopping expenditure. For the designated town centres, Clacton-on-Sea claims 4.2% market share of top up shopping trips while Harwich only claims about 0.2%. Out of centre foodstores also claim a significant proportion of top up shopping trips, four dominant stores (Morrisons Centenary Way, Tesco Brook Retail park, Morrisons Waterglade Retail Park and Morrisons Iconfield Park) have a total market share of 14.6%.
- As would be expected, the household survey indicates that top up shopping trips tend to be undertaken on a more frequent basis than main food shopping trips, with 78.8% of respondents undertaking such shopping trips at least once a week.

- 4.18 A overview comparison of the 2005 survey result to 2015 survey is carried out to understand the change in shopping patterns. The comparison is based on the 2005 results contained in the last retail study as we are unable to obtain a copy of the full household survey result. Table 4.4 shows the change in retention level in each zone within the Tendring Study Area. The retention level in all zones improved in the last 10 years, with a substantially higher retention in WYG Zones 1-3. Zone 4 facilities retained a higher level of market share but it is still evident that more than half of the shoppers undertook their convenience goods shopping outside the District, predominately in Colchester.

4.19 Table 4.4 below shows the breakdown of the overall convenience goods shopping market share in 2005 and 2015. The breakdown indicates that although the Tendring facilities in Zones 1-3 secure similar levels of market share (between 95.8% to 96.2%), each town (including out of centre stores) secures very different market share in each zone. Clacton secures the highest market share in Zones 1 (47.6%) and 2 (95.4%) while Harwich (including out of centre facilities) claims the highest market share (81.3%) in zone 3. In Zone 4, Tendring facilities secures less than half of the market share and facilities in Colchester, including Tesco at Highwoods (18.1%) and Tesco at Greenstead Road (Colchester Hythe superstore) (6.2%), claim a significant market share of this zone.

**Table 4.4 Tendring District Combined Convenience Shopping Patterns in 2005 and 2015**

Destinations	Tendring Study Area								
	Zone 1 (Zone 6)		Zone 2 (Zone 7)		Zone 3 (Zone 5)		Zone 4 (Zone 4)		Total
	2005	2015	2005	2015	2005	2015	2005	2015	2015
Clacton on Sea*	39%	47.6%	77%	95.6%	0%	8.8%	7%	12.1%	53.5%
Frinton-on-Sea*	31%	36.2%	0%	0%	0%	0%	0%	0%	5.0%
Harwich*	1%	2.8%	0%	0.4%	49%	81.3%	1%	10.1%	17.2%
Dovercourt	0%	0%	0%	0%	9%	6.1%	0%	0%	1.1%
Brightlingsea	0%	0%	0%	0%	0%	0%	6%	4.6%	1.1%
Manningtree	0%	0%	0%	0.3%	0%	0%	6%	18.5%	4.6%
Walton-on-the-Naze	4%	9.2%	0%	0%	0%	0%	0%	0%	1.3%
<b>TOTAL TENDRING STORES</b>	<b>75%</b>	<b>95.8%</b>	<b>77%</b>	<b>96.3%</b>	<b>58%</b>	<b>96.2%</b>	<b>20%</b>	<b>45.3%</b>	<b>83.7%</b>
Tesco Highwoods Square, Colchester	0%	0%	0%	0%	4%	0%	20%	18.1%	4.4%
Asda, Turner Rise Retail Park, Colchester	0%	0%	1%	0.6%	3%	0.5%	5%	4.0%	1.3%
Tesco, Greenstead Road, Colchester (Hythe Superstore)	0%	0%	0%	0%	1%	0.5%	10%	6.2%	1.6%
Tesco Express, St Christopher Road, Colchester	0%	0%	0%	0.1%	2%	0%	3%	0%	0.0%
Tesco Express, Bromley Road, Colchester	1%	0%	0%	0%	2%	0%	4%	0.6%	0.1%
Ipswich**	0%	0%	0%	0%	0%	0.4%	13%	5.9%	1.5%
Other facilities (including within and outside SA)***		4.2%		3.1%		2.5%		19.9%	7.3%
<b>TOTAL</b>		<b>100%</b>		<b>100%</b>		<b>100%</b>		<b>100%</b>	<b>100.0%</b>

Source: Table 5.2 GVA Study 2010 and Table 3 of WYG Appendix D

Notes:

\* includes out of centre stores

\*\*Ipswich out of centre store includes Asda, Stoke Park Drive, Lidl at Handford Road and Hening Avenue, Morrisons, Sproughton Road, Sainsbury's Local Woodbridge Road, Sainsbury's Hadleigh Road, Sainsbury's Warren Heath, Tesco Extra Copdock and Waitrose at Futura Park.

\*\*\* 'Other facilities' are listed in Table 3 of Appendix D

- 4.20 In considering convenience goods shopping patterns in the Tendring Study Area, it is of some relevance to compare the percentage of overall journeys attracted to each authority area with the percentage of the Tendring Study Area population that resides in that authority area. In this regard, Experian MMG3 data indicates that the population of the Tendring administrative area at 2015 is 144,671. The population of Tendring equates to 46.9% of the overall 2015 Sub Region Study Area population of 308,376. Accordingly, it might be expected – given that shoppers typically seek to use food shopping facilities close to home – that Tendring food retail facilities would gain a broadly similar market share of overall trips.
- 4.21 In this regard, the household survey indicates that the Tendring Study Area secures a market share of 39.0% of all main food shopping trips that originate within the Sub Region Study Area. Accordingly, facilities in Tendring secure a much lower main food shopping trips than we might expect. This is a consequence of there being a number of large food supermarkets and superstores located outside the Tendring administrative boundary that are in close proximity to cater for the needs of the District's residents and those of the surrounding communities.
- 4.22 In respect of top up food shopping, the facilities in Tendring secure a market share of 47.2% of all top up food shopping trips that originate within the Sub Region Study Area. Accordingly, the market share for this type of shopping trip more closely aligns with the proportion (46.9%) of the Sub Region Study Area population which is accommodated within the District.
- 4.23 Clearly, the drawing of local authority boundaries is largely immaterial to customers making decisions about where to shop. However, we consider that – subject to the availability of appropriate locations to accommodate additional development – there may be potential for new facilities in the north of the district to secure a greater proportion of main food convenience goods expenditure that originates from within Zone 4 given that Zone 4 has the highest level of trade lost to neighbouring areas (£35.5m). Zone 4 currently has a reasonable main food retail retention of 40.3%; however, this compares to 67.7% for top-up food demonstrating that if improved main food offer could help reduce the need for residents to travel further afield to source their main food shop. The total amount of convenience goods expenditure originates from within Zone 4 lost to outside Tendring Study Area equals to £39.8m.

## Linked Trips

- 4.24 Specific questions were asked in relation to linked trips shopping pattern. The majority of the respondents (64.9%) in the Sub Region Study Area did not carry out any linked trip after their main food shopping<sup>35</sup>. Only 6.2% of respondents linked main food shopping with non-food shopping, followed by 5.1% travelling to/from work, 4.3% carrying out leisure activity, 3.2% on other food shopping and 1.2% on visiting services such as banks and other financial facilities.
- 4.25 A closer analysis is carried out at Table 4.5 below to identify destinations of respondents that linked their main food shopping with 'non-food' and 'other food' or 'financial institution' (question 11) which represents 10.6% in total. For Zone 1 (Frinton-on-Sea and Walton-on-the-Naze), over 50 % of respondents linked their trip in Frinton-on-Sea. For Zone 2 (Clacton on Sea), over 67% of residents linked their trip at Clacton and 18.4% at Brook Retail Park in Clacton. For Zone 3 (Harwich and Dovercourt), 34.8% of residents linked their trip at Harwich and 28.9% in Dovercourt. For Zone 4 (Manningtree), 42.9% of respondents linked their trip at Colchester and 14.3% at Tesco Extra, Highwoods at Colchester. The results showed that most respondents carrying out linked trips, continuing their shopping in the zone they reside in except Zone 4 where the majority went to Colchester.

**Table 4.5: Main Food Linked Trips Destinations**

Destinations	Total	Tendring Study Area				Sub Region Study Area		
		Zone 1 Frinton & Walton	Zone 2 Clacton	Zone 3 Harwich	Zone 4 Manningtree & Brightlingsea	Zone 5 Wivenhoe	Zone 6 Colchester	Zone 7 Babergh
Brook Retail Park, Clacton	5.2%	0.0%	18.4%	0.0%	0.0%	0.0%	0.0%	0.0%
The Stanway Retail Park, Colchester	1.2%	0.0%	0.0%	14.1%	0.0%	0.0%	0.0%	0.0%
Clacton on Sea	23.4%	26.5%	67.2%	11.9%	0.0%	7.4%	3.3%	0.0%
Colchester	28.7%	0.0%	0.0%	0.0%	42.9%	65.3%	53.6%	13.0%
Dovercourt	3.8%	13.7%	0.0%	28.9%	14.3%	0.0%	0.0%	0.0%
Frinton-on-Sea	3.6%	53.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Harwich	3.4%	6.0%	0.0%	34.8%	0.0%	0.0%	0.0%	6.5%
Manningtree	1.1%	0.0%	0.0%	0.0%	28.6%	0.0%	0.0%	0.0%
Tesco Extra, Highwoods, Colchester	0.4%	0.0%	0.0%	0.0%	14.3%	0.0%	0.0%	19.5%
Others	29.3%	0.0%	14.4%	10.3%	0.0%	27.3%	43.1%	80.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Question 11 of the telephone household survey

<sup>35</sup> Result gathered from household survey question 10.

## Comparison Goods Shopping Patterns: Clothing

- 4.26 As shown in Table 9 of Appendix D, Colchester in Zone 6 is the single most popular destination for clothes shopping in the Sub Region Study Area, attracting more than half of all such trips (54.3%) which originate in the Sub Region Study Area. The popularity of facilities in Colchester is directly proportionate to its proximity to the Tendring district boundary. Colchester has the highest trade draw from Zone 4 (62.2%) and secures more than three in every five trips to purchase clothing and footwear which originate within Zone 4. The influence of Colchester has less influence on Zone 2. Within Zone 2, Clacton town centre claims the highest market share (32.4%) compared to Colchester on 29.7%. The existing Clacton Factory Outlet Centre also claims a considerable market share of 10.9% in Zone 2. The presence of Peacock and Brantano at Gateway Retail Park in Harwich claims the highest single destination in Zone 3 (7.8%) which is higher than the total of Dovercourt and Harwich town centres. As indicated in Table 4.8 the clothing and footwear market share at facilities in Tendring has the second lowest of the all the comparison goods sectors with significant expenditure outflow to Colchester.
- 4.27 Considering the clothing shopping patterns in Tendring Study Area, retail facilities in Tendring Study Area claims 37.5% of clothing expenditure generated in Tendring Study Area while 45.3% of expenditure is lost to Zones 5-7 with a further 17.2% lost to facilities outside the Sub Region Study Area. This indicates a total of £60.9m is lost to retail facilities outside Tendring Study Area.

## Comparison Goods Shopping Patterns: Books, CDs and DVDs

- 4.28 Internet shopping has a significant impact on purchase of books, CDs and DVDs. The survey identified that 41% of the respondents in the Sub Region Study Area undertake such purchase via internet/ or delivery rather than visiting a physical shop.
- 4.29 Table 11 of Appendix D identifies the shopping patterns for books, CDs and DVDs. Colchester is again the single most popular destination for books, CDs and DVDs in the Sub Region Study Area, capturing 51.4% of such trips in the Sub Region Study Area. Frinton-on-Sea in Zone 1, Clacton town centre in Zone 2 and Harwich town centre in Zone 3 are the highest single destinations within its own zone indicating that residents in those three zones shop more locally. Caxton Books and Gallery at Connaught Avenue is the major bookstore in Frinton-on-Sea town centre and there are a total of four book stores in Harwich town centre.
- 4.30 In respect to the performance of the district area, Table 11 shows that Tendring district area claims only 25.9% of all shopping trips to purchase books, CDs and DVDs which originate within



the Sub Region Study Area. Colchester in Zone 6 attracts over half (51.4%) of all such trips which originate within the Sub Region Study Area.

- 4.31 Considering the shopping pattern on books, CDs and DVDs, more than half of the expenditure generated from Tendring Study Area is retained in Tendring; this implies £14.0m of Tendring Study Area expenditure is retained in the district.

### Comparison Goods Shopping Patterns: Small Household Goods

- 4.32 Table 13 of Appendix D identifies that Tendring district area attracts 29.2% of shopping trips to purchase small household goods (including such items as tableware, household utensils, jewellery, watches and appliances for personal care) which originate from within the Sub Region Study Area. That means 7 in every 10 trips to purchase small household goods is undertaken outside the Tendring Study Area.
- 4.33 For Zones 1 and 2, Clacton town centre is the highest single destination for small household products (36.0% and 50.3% for Zones 1 and 2 respectively). For Zone 3, Harwich and Dovercourt together claim the highest market share (30.0%). While in Zone 4, Harwich and Dovercourt capture the highest market share at 8.0%. However, in Zone 4, nearly 90% of small household goods trips was undertaken outside the Tendring area with 38.8% in Colchester town centre. This leakage shows that the current small household goods retail offer is limited in Tendring and residents tend to undertake their small household goods shopping elsewhere.
- 4.34 A total of 50.5% of small household goods expenditure generated from Tendring Study Area is retained in Tendring district, a retention of £39.6m out of total available of £78.4m.

### Comparison Goods Shopping Patterns: Toys, Games, Bicycles and Recreation Goods

- 4.35 Table 15 of Appendix D identifies that Tendring district secures 21.9% of all shopping trips to purchase toys, games, bicycles and similar items which originate within the Sub Region Study Area, of which more than half of the market share (13.4%) is claimed by Clacton town centre. Colchester town centre claims 37.3% of the market share within the Sub Region Study Area.
- 4.36 Clacton town centre claims the highest single destination in Zones 1 and 2 (30.1% and 42.2% respectively). The market share is considerably higher than out of centre locations reflecting that Clacton's offer of recreation goods is better than that available at retail parks. In Zone 3, Harwich capture the highest market share within that zone and for Zone 4, the market share is focused

across Dovercourt, Harwich Gateway Retail Park, Clacton Factory outlet, Brook Retail Park and Clacton town centre.

- 4.37 Considering the shopping patterns of toys, games, bicycles and similar items, retail facilities in Tendring Study Area claims a market share of 41.7% of the expenditure generated from the Tendring Study Area, this implies that an estimate of £32.0m is lost to retail facilities outside the Tendring Study Area.

### Comparison Goods Shopping Patterns: Chemist Goods

- 4.38 Chemist goods are typically purchased in a similar manner to convenience items, with a large proportion of such trips taking place close to home (due to the principally similar nature of many such goods which reduces the propensity to “shop around”). Accordingly, a wide range of facilities attract shopping journeys, including defined centres and standalone pharmacists. Facilities outside of Tendring have a more limited market share of chemist goods when compared to most other non-bulky comparison goods categories, as most people tend to undertake such trips near to where they live.
- 4.39 Table 17 of Appendix D shows that Frinton-on-Sea town centre captures a market share of 67.3% in Zone 1 but all the district facilities within Zone 1 (also including Walton-on-the-Naze Town centre and Kirby Cross) captures a significant level of market share at 84.6%. Clacton on Sea town centre claims 80.5% of market share in Zone 2 and Dovercourt and Harwich town centres together claim a total market share of 73.0% in Zone 3. It reflects that the town centre in surrounding zones has a high market share for chemist goods and the trade draw of Colchester and Ipswich is less dominant when compared to other retail sectors. As chemist goods purchases tend to take places closer to home, Colchester town centre facilities has a more limited trade draw (2.3%, 2.8% and 12.2% in Zones 1, 2 and 3 respectively) on Tendring.
- 4.40 Tendring retail facilities claims a high market share of 81.2% of the expenditure generated from Tendring Study Area, this implies a total of £13.5m is retained in Tendring with £3.1m lost to facilities outside Tendring Study Area.

### Comparison Goods Shopping Patterns: Electrical

- 4.41 As one would expect, both Colchester town centre and Tollgate Retail Park at Colchester claim a significant electrical goods market share in the Sub Region Study Area. Each destination secures 23.2% of market share. This is nearly twice that of the Clacton on Sea market share (13.4%). Within Zone 1, Frinton-on-Sea town centre is the most popular destination for electrical goods

(43.1%) followed by Clacton town centre (38.4%). Within Zone 2, Brook Retail Park which contains a B&Q and Curry/PC World claims a 39.8% of the market share; however, Clacton town centre is the most popular single destination for electrical goods in Zone 2 (46.3%). In Zone 3, the market share is shared between Harwich Gateway Retail Park (16.1%), Harwich and Dovercourt town centres (28.0%), Brook Retail Park in Clacton (10.4%) and Tollgate Retail Park in Colchester (17.0%). In Zone 4, all facilities within Tendring only secure a market share of 20.2%. Overall, Colchester town centre and retail warehousing facilities claim 57.3% of electrical market share from the zone which is significantly higher than the total market share of all facilities in Tendring (33.7%).

- 4.42 Within the Tendring Study Area, retail facilities in Tendring claims a total of 67.0% market share, this implies £39.2m is retained in Tendring Study Area and £19.3m is lost to retail facilities in Zones 5-7 and outside the Sub Region Study Area.

### Comparison Goods Shopping Patterns: DIY

- 4.43 DIY goods are typically purchased at out of centre locations and Clacton town centre's market share of DIY goods shopping trips – equates to 12.6% of all such trips across the Sub Region Study Area – is broadly consistent with our expectations.
- 4.44 By far the most popular destination for DIY shopping in the Sub Region Study Area is B&Q Warehouse in Colchester (27.1%) which claims double the market share when compared to Clacton town centre. However, Clacton town centre claims nearly half of the trips (49.5%) orientating from Zone 1. In Zone 2, Brook Retail Park (includes a B&Q and Currys) in Clacton is the most popular shopping destination for DIY products and claims more than half of the market share (56.3%). For Zone 3, the most popular DIY shopping destination is B&Q Warehouse in Colchester (19.2%). In Zone 4, facilities in Tendring only claims 26.5% market share and the B&Q Warehouse in Colchester captures a market share of 54.2%.
- 4.45 Considering the shopping pattern for DIY products, Tendring retail facilities claims a total of 74.0% of market share of the expenditure generated within the Tendring Study Area. This implies a total of £19.3m is retained in the district with a £6.8m leakage to facilities in Zones 5 to 7 and outside the Sub Region Study Area.

### Comparison Goods Shopping Patterns: Furniture

- 4.46 Clacton and other town centres all together secure a relatively small market share of furniture shopping trips (21.8%) which originate from within the Sub Region Study Area. By contrast,

Colchester town centre and Tollgate Retail Park Colchester claims 22.8% and 18.4% of market share respectively.

- 4.47 Within Zones 1 and 2, Clacton town centre is the most popular destination for furniture purchases (34.8% and 27.3% respectively) while in Zone 3, Harwich Gateway Retail Park is the most popular destination (17.8%). In Zone 4, existing facilities claim only 16.4% of the expenditure from the Tendring area (Zones 1 to 4) and Colchester town centre and retail warehousing captures a significant market share.
- 4.48 Overall Tendring retail facilities retain less than half of the furniture expenditure in the district. Only 41.7% of expenditure (£17.5m) is spent in Zones 1-4 with £24.5m of furniture is spent in Zones 5-7 and outside the Sub Region Study Area.
- 4.49 A summary table showing the comparison goods expenditure retention level in Tendring Study Area by comparison goods category is shown in Table 4.6a and Table 4.6b.

**Table 4.6a Comparison Goods Shopping Patterns in Tendring Study Area (by %)**

	Furniture	DIY	Electrical	Clothes	CDs etc	Household	Recreation	Chemist
Tendring Study Area (Zones 1 -4)	41.7%	74.0%	67.0%	37.5%	55.5%	50.5%	41.7%	81.2%
Zones 5 -7	48.4%	24.0%	26.8%	45.3%	30.7%	36.9%	36.7%	17.5%
Beyond Zone 7	9.8%	2.0%	6.2%	17.2%	13.8%	12.6%	21.6%	1.3%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

**Table 4.6b Comparison Goods Shopping Patterns in Tendring Study Area (by £M)**

	Furniture	DIY	Electrical	Clothes	CDs etc	Household	Recreation	Chemist
	(£M)	(£M)	(£M)	(£M)	(£M)	(£M)	(£M)	(£M)
Tendring Study Area (Zones 1 -4)	17.5	19.3	39.2	36.5	14.0	39.6	22.8	13.5
Zones 5 -7	20.3	6.3	15.7	44.2	7.8	28.9	20.1	2.9
Beyond Zone 7	4.1	0.5	3.6	16.7	3.5	9.9	11.8	0.2
<b>Total</b>	<b>42.0</b>	<b>26.1</b>	<b>58.5</b>	<b>97.4</b>	<b>25.3</b>	<b>78.4</b>	<b>54.8</b>	<b>16.7</b>

## Comparison Shopping Patterns

- 4.50 Table 4.7 below shows both the Sub Region Study Area and the Tendring Study Area market share identified in the 2015 household surveys, broken down by destinations. In the 2015 survey, it was found that Clacton town centre claims a comparison goods market share of 10.9% from the Sub



Region Study Area (Zones 1-7) and a market share of 23.9% if accounting expenditure generated from Tendring Study Area (Zones 1 - 4). A closer analysis indicates that Tendring facilities captured a total of £202.5m of Tendring residents' expenditure against the total available comparison goods expenditure generated in Tendring's Study Area (Zones 1 to 4) of £399.1m. This equates to a market share of 50.7% of the Tendring Study Area. Nearly half of that comparison goods expenditure is spent in Clacton town centre followed by Brook Retail Park (6.6%). Within the Sub Region Study Area, Colchester town centre has a largest market share of 37.5%, followed by Clacton town centre 10.9%, Tollgate Retail Park (9.8%), Stanway Retail Park (3.7%) and then Brook Retail Park of 3.1%. The results do show that there is a significant level (£145.8m) of locally generated expenditure from the Tendring Study Area that is being spent at facilities in Colchester in Zone 6, with a further £50.8m being spent beyond Colchester and outside the Sub Region Study Area. The results show that most (46.4%) of this expenditure leakage relates to Zone 4 expenditure being spent at facilities in Zone 6, 26.3% of expenditure from Zone 2 is being spent at facilities in Zone 6. When the expenditure leakage to facilities to all facilities outside Tendring Study Area is considered, then Zone 4 has the highest level of trade leakage at £89.6m or 45.6%. Zone 2 has the second highest level of expenditure leakage at 27.9% (or £54.7m). In terms of inflow to the district from the Sub Region Study Area, the results show that just 2% of the derived turnover to facilities in Tendring is sourced from the Sub Region Study Area demonstrating that facilities in the district do not attract a significant level of trade from residents from the Sub Region Study Area, clearly due to the considerable quality of the retail offer that is available to local residents in Colchester which negates the need to travel to facilities in Tendring.

**Table 4.7: Total Comparison Goods Market Share by Destination (2015)**

Destinations	SUB REGION STUDY AREA (Zones 1-7)		TENDRING STUDY AREA (Zones 1 - 4)	
	(£M)	(%)	(£M)	(%)
Clacton Town Centre	96.2	10.9%	95.6	23.9%
Frinton-on-Sea Town Centre	17.2	2.0%	16.5	4.1%
Harwich Town Centre	15.0	1.7%	15.0	3.8%
Dovercourt Town Centre	8.3	0.9%	8.2	2.0%
Brightlingsea Town Centre	2.2	0.3%	1.9	0.5%
Manningtree Town Centre	3.8	0.4%	3.4	0.8%
Walton-on-the-Naze Town Centre	1.8	0.2%	1.8	0.5%
Brook Retail Park, Clacton	27.1	3.1%	26.3	6.6%
Harwich Gateway Retail Park, Harwich	10.6	1.2%	10.3	2.6%
Others in Tendring	4.1	0.5%	23.4	5.9%
<b>Tendring Retention (Zones 1-4)</b>	<b>206.6</b>	<b>23.5%</b>	<b>202.5</b>	<b>50.7%</b>
B&Q Warehouse, Lightship Way, Colchester	17.8	2.0%	6.2	1.5%
Colchester Retail Park, Colchester	10.4	1.2%	5.9	1.5%
The Stanway Retail Park, Colchester	32.4	3.7%	8.8	2.2%
Tollgate Retail Park, Colchester	86.3	9.8%	13.8	3.4%
Turner Rise Retail Park, Colchester	9.0	1.0%	1.7	0.4%
Tesco Extra, Highwoods, Colchester	8.0	0.9%	0.9	0.2%
Colchester Town Centre	329.7	37.5%	100.0	25.1%
Others in the Zone 6	45.4	5.2%	8.6	2.1%
<b>Colchester Area (Zone 6)</b>	<b>539.0</b>	<b>61.3%</b>	<b>145.8</b>	<b>36.5%</b>
Other facilities within the Sub Region Study Area (Zones 5 & 7)	3.3	0.4%	0.3	0.1%
Other facilities outside the Sub Region Study Area	130.6	14.9%	50.5	12.6%
<b>Total Comparison Goods Expenditure Captured in Tendring Study Area (Zones 1-4)</b>	-	-	<b>399.1</b>	<b>100.0%</b>
<b>Total Comparison Goods Expenditure Captured in Sub Region Study Area (Zones 1-7)</b>	<b>879.5</b>	<b>100.0%</b>	-	-

Source: Table 25 of Appendix D

**Table 4.8: Tendring Town Centres Market Share by Zone in 2005 and 2015 (%) – Comparison Goods**

2005 zone	WYG zone	Clacton Town Centre		Frinton-on-Sea Town Centre		Harwich & Dovercourt Town Centres		Brightlingsea Town Centre		Manningtree Town Centre		Walton-on-the-Naze Town Centre		Other Facilities in Tendring		Other Facilities outside Tendring		Total	
		2005	2015	2005	2015	2005	2015	2005	2015	2005	2015	2005	2015	2005	2015	2005	2015	2005	2015
6	1	12.9	29.3	27.5	26.1	0.0	1.6	0.0	0.0	0.0	0.0	1.4	3.2	8.5	8.3	49.7	31.4	100	100
7	2	43.1	42.6	0.4	0.7	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	9.6	22.5	47.0	33.4	100	100
5	3	0.7	8.0	0.5	0.4	30.1	23.6	0.0	0.0	0.0	0.6	0.0	0.0	1.6	18.3	67.2	49.2	100	100
4	4	2.5	3.2	0.6	0.2	1.6	4.2	2.6	1.8	0.2	2.7	0.0	0.0	1.7	5.3	90.8	82.5	100	100
8	5	0.0	0.8	0.0	0.0	0.0	0.5	0.0	0.5	0.0	0.1	0.0	0.0	0.8	0.6	99.2	97.6	100	100
9	6	0.1	0.1	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.3	99.8	99.3	100	100
Part 3	7 *	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.8	100.	98.6	100	100

Source: Table 25 of Appendix D of WYG & Tables 3, 39-58 Appendix 3 of GVA Retail Study 2010. Please note that Zone 7 boundary differs from Zone 3 defined in the previous retail study.

- 4.51 Table 4.8 identifies that Tendring town centres have gained in market share over the last 10 years. Clacton has expanded its market share over the intervening period, reaching a market share of 29.3%, 42.6 and 8.0% in Zones 1, 2 and 3 respectively (12.9%, 43.1% and 0.7% in 2005).
- 4.52 Frinton-on-Sea town centre has retained a similar level of market share since the last survey. We understand that as residents do not always differentiate between Harwich and Dovercourt, the analysis on market share for these two centres are grouped together. Harwich and Dovercourt has expanded its market share over the intervening period in Zones 1, 2 and 4 but a reduction in its own zone. For Brightlingsea, the market share decreases slightly in its own zone, from 2.6% to 1.8%, however, it draws additional market share from Zones 5 in 2015. Manningtree has expanded its market share in Zones 3, 4, 5 and 7 with improved performance in its own zone. Walton-on-the-Naze captured a higher market share in Zone 1, increasing from 1.4% to 3.2%. On the other hand, the out of centre facilities increase its market share significantly in Zones 2, 3 and 4. This is proved by the strong performance of Brook Retail Park in Zone 2, Harwich Gateway Retail Park in Zone 3 which contribute to the increase of market share of other facilities in Tendring. However, non Tendring retail facilities has a reduction of market share from all Tendring Zones. This implies that less Tendring residents travelled outside of Tendring for comparison goods facilities.
- 4.53 Table 4.9 summarises the market share of each town centre by comparison goods category. As we expected, Clacton town centre has the highest market share in all comparison goods categories. Whilst in contrast, Walton-on-the-Naze has the lowest market share compared to other designated town centres within Tendring district.

- 4.54 In respect of the district performance as a whole, Tendring facilities claim a market share of 18.1% on clothing to 41.0% on chemist goods. This implies that most residents living within Tendring district undertake their comparison goods shopping outside the district area.
- 4.55 Outside Tendring District but within the Sub Region Study Area, Colchester claims the highest market share on all comparison goods categories except for DIY which B&Q warehouse in Colchester claims a higher market share.

**Table 4.9: Tendring Town Centres Market Share Breakdown by Destination (2015) – Comparison Goods in Tendring Study Area**

Destination	Comparison Goods - Market Share by Category (%)							
	Furniture	DIY	Electrical	Clothes	CDs etc	Household	Toys, Games Recreation	Chemist
<b>Town Centres</b>								
Clacton on Sea	17.5%	25.2%	26.5%	19.3%	30.5%	26.3%	23.9%	36.2%
Frinton on Sea	3.3%	3.7%	6.8%	3.1%	8.5%	2.5%	2.5%	10.3%
Harwich and Dovercourt	2.9%	4.8%	6.1%	3.4%	6.0%	8.1%	6.7%	13.8%
Brightlingsea	0.4%	0.6%	0.7%	0.3%	1.2%	0.0%	0.0%	3.4%
Manningtree	2.2%	1.5%	0.5%	0.3%	0.8%	0.0%	0.3%	5.9%
Walton-on-the-Naze	0.5%	0.1%	0.0%	0.3%	0.0%	0.6%	0.8%	2.1%
Others in the Tendring Study Area	15.0%	39.0%	26.5%	10.7%	8.6%	13.0%	7.6%	9.4%
<i>Tendring Study Area Sub-Total</i>	<b>41.7%</b>	<b>74.0%</b>	<b>67.0%</b>	<b>37.5%</b>	<b>55.5%</b>	<b>50.5%</b>	<b>41.7%</b>	<b>81.2%</b>
<b>Zones 5-7 (Facilities in Sub Region Study Area)</b>								
B&Q Warehouse, Colchester	1.5%	18.9%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%
The Stanway Retail Park, Colchester	5.0%	0.8%	4.3%	0.4%	0.0%	1.9%	4.1%	0.0%
The Tollgate Centre, Colchester	4.8%	0.0%	2.2%	0.0%	0.5%	0.6%	0.8%	0.4%
Tollgate Retail Park, Colchester	8.8%	0.0%	7.8%	2.2%	0.4%	1.3%	4.1%	0.4%
Colchester town centre	18.8%	2.8%	10.6%	40.9%	29.0%	25.9%	27.6%	15.9%
Others	9.6%	1.5%	2.0%	1.9%	0.7%	6.4%	0.3%	0.7%
Sub Region Study Area Sub-Total	48.4%	24.0%	26.8%	45.3%	30.7%	36.9%	36.7%	17.5%
<b>Outside the Sub Region Study Area (Beyond Zone 7)</b>								
Chelmsford town centre	0.0%	0.0%	0.0%	1.2%	3.6%	0.0%	0.5%	0.0%
Euro Retail Park, Ipswich	1.7%	0.4%	0.6%	0.0%	0.0%	1.6%	0.0%	0.0%
Freeport Outlet Shopping Village, Braintree	0.0%	0.0%	0.0%	1.6%	0.0%	0.3%	0.0%	0.0%
Ipswich town centre	1.5%	0.9%	1.4%	3.9%	5.4%	3.6%	4.3%	0.6%
Lakeside Retail Park, West Thurrock	3.9%	0.0%	0.0%	2.0%	0.0%	2.2%	1.5%	0.0%
Norwich	0.0%	0.0%	0.2%	0.4%	0.0%	0.0%	0.5%	0.0%
The Interchange Retail Park, Ipswich	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.7%	0.0%
Others	2.7%	0.7%	2.8%	8.1%	4.8%	4.9%	14.2%	0.7%
Sub-Total	9.8%	2.0%	6.2%	17.2%	13.8%	12.6%	21.6%	1.3%
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Source: Tables 9-23 Appendix D



- 4.56 Once again, in considering comparison good shopping patterns in the Study Area, it is of some relevance to compare the percentage of overall journeys attracted to the Tendring authority area with the percentage of the Study Area population that resides in that authority area. In this regard, the population of Tendring equates to 46.9% of the overall 2015 Study Area population. For comparison goods, we appreciate that facilities in Tendring are all located in reasonably close proximity to the vast variety of facilities in Colchester. As such, it may be expected that the comparison market share that is retained within the Tendring administrative area would be influenced to a large degree by the trade draw from these other higher order centres.
- 4.57 As set out above in Table 4.9, Tendring's market share of shopping trips originating from within the Tendring Study Area for the various comparison goods sub-sectors ranges from 37.5% (for clothing goods) to 81.2% (for chemist goods). The total comparison goods market share of shopping trips originating from within the Tendring Study Area amounts to 50.7%.
- 4.58 Furniture, clothing and recreation goods in Tendring secures market shares lower than 46.9% (the proportion of the Study Area population within the Tendring administrative area) for all shopping trips that originate within the Tendring Study Area demonstrating that the local population are reliant on facilities in adjoining authorities to satisfy their these comparison goods shopping trips. Consequently, there is a reasonably poor retention rate for shopping trips for these types of product within the Tendring district which requires potential intervention.

### Conclusion

- 4.59 Empirical evidence has been gathered in order to establish current shopping patterns and consumer preferences within the Tendring Study Area and the Sub Region Study Area. This involved commissioning a telephone survey of 1,000 households. The Sub Region Study Area is broken down into seven different zones, which allow shopping patterns/behaviour to be assessed over different geographical areas within the Sub Region Study Area. The household survey has identified the market share of different retail patterns across the Sub Region Study Area and the Tendring Study Area.
- 4.60 Tendring's market share of Sub Region Study Area convenience goods spending has increased significantly since the last survey conducted in 2005. The largest improvement occurred in Zone 4 where market share within Tendring has doubled (from 20% to 45.3%). Typically convenience shopping is mostly carried out closer to home. The results show that in Zones 1 to 3 convenience

goods trade retention has significantly improved since 2005 with a market share is of over 95% in each of the three zones with limited trade leakage to facilities outside the district. While for Zone 4 more than half of the convenience shopping was undertaken at Colchester and there is likely to be scope for potential to claw back some of this expenditure if new 'main food' retail facilities could be secured in this part of Tendring.

- 4.61 In relation to comparison goods performance, Tendring facilities captured a total of £202.m of Tendring residents' comparison expenditure (i.e. 50.7% of the total available of available comparison expenditure). This clearly shows a significant amount of expenditure leakage to other facilities outside Tendring. Clacton town centre claims the highest market share in the Tendring Area; however, within the Sub Region Study Area, Colchester town centre secures a market share of 37.5% which is significantly higher than the total market share of Tendring town centres of 16.4% (Clacton, Frinton-on-Sea, Harwich, Dovercourt, Brightlingsea, Manningtree and Walton-on-the-Naze town centres) altogether. Besides, retail park facilities such as Tollgate Retail Park and the Stanway Retail Park also have a significant trade draw of the comparison expenditure in the Sub Region Study Area.
- 4.62 From review of the goods type analysis shows that Tendring facilities claims the highest level of market share on chemist goods (81.2%), followed by DIY (74.0%) and Electrical (67.0%) in the Tendring Study Area. DIY is the only category that the market share of out of centre facilities (38.0%) is higher than the total market share of seven town centres in total (36.0%). Clothing market share is low at 37.5% which reflects the influence of higher order centres within and outside the Tendring Study Area and demonstrates a clear deficiency in this level of provision within the district.

### 5.0 Health Check Assessments

5.01 The National Planning Policy Framework (NPPF) of March 2012 states that local authorities should set out policies for the management and growth of centres over the plan period. The NPPF requires local authorities to recognise town centres as the heart of their communities and to pursue policies to support their viability and vitality. It is recognised that competitive town centre environments should be promoted in order to ensure customer choice, a diverse retail offer and to reflect the individuality of town centres.

5.02 Whilst the NPPF does not provide a list of indicators to be used to assess the health of a centre, such criteria has recently been published in the Government's 'Ensuring the Vitality of Town Centres' Planning Practice Guidance (NPPG) of March 2014. Indicators which should be monitored on a regular basis in order to judge the health of a centre and its performance over time include the following:

- **Diversity of uses** | Data on the diversity of uses in the town centre and the district and local centres was collated during our surveys in May and June 2015.
- **Proportion of vacant street level property** | Vacant properties were identified during the undertaking of the surveys.
- **Commercial yields on non-domestic property** | Data on commercial yields is not available publically at this time.
- **Customers' views and behaviour** | Information on customers' views is based on the NEMS household survey results.
- **Retailer representation and intentions to change representation** | Information on the current strength of centres, retailer representation and retailer requirements has been derived from Venuescore's UK Shopping Venue Rankings and from other published sources.
- **Commercial rents** | Zone A rental data has been sourced from Colliers International, who are widely recognised sources of such data.
- **Pedestrian flows** | General footfall and pedestrian flows were observed during the undertaking of the centre surveys. For Clacton town centre, footfall data is provided by Springboard.
- **Accessibility** | Consideration of access to and around each centre is informed by WYG's surveys.
- **Perceptions of safety and occurrence of crime** | A general perception of safety was gathered during the undertaking of the surveys and is supplemented by the NEMS household survey results

- **State of town centre environmental quality** | Consideration of the quality of the buildings and public realm in each of the centres has also been informed by WYG's 'on the ground' observations.

- 5.03 The commentary below provides an overview of our analysis of the health of Tendring's town centres in respect of each of the above indicators. We have also visited each defined major town and town, centre in Tendring and, whilst not all of the above indicators are applicable to smaller centres, we also provide our assessment of the health of these centres in this section of our report and the diversity of use plans are attached in Appendix C.
- 5.04 We commence our assessment by considering the role of Tendring's defined centres in the sub-regional shopping hierarchy.

### Sub Regional Hierarchy

- 5.05 A plan showing the location of the Sub Region Study Area relative to the main settlements in the sub-region is included at Appendix B.
- 5.06 Table 5.1 illustrates the position of the sub-region's principal centres based on the Venuescore's UK Shopping Venue Rankings 2014-15. Venuescore's index ranks 3,000+ retail venues within the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlet centres) based on the strength of their current retail provision. Towns and major shopping centres are rated using a scoring system which takes account of the presence in each location of multiple retailers – including anchor stores, fashion operators and non-fashion multiples.
- 5.07 Venuescore allocates each centre within a tier, reflecting its level of retail provision. The eight tiers comprise (highest to lowest): 'Major City', 'Major Regional', 'Regional', 'Sub-Regional', 'Major District', 'District', 'Minor District' and 'Local'. The rankings in the table represent the position of the centres at the time of the most recent 2014-15 Rankings, as well as competing surrounding destinations. The market position index and classification, as set out in the below table provides an indication as to whether a retail venue's focus is upmarket (luxury goods) or more downmarket (discount stores).

**Table 5.1: Venuescore Sub-Regional Shopping Hierarchy**

Destination	Location Grade	Score 2015	Rank 2015	Rank 2010	Rank 2005	Change in Rank 2010-2015
Bluewater, Greenhithe	Major Regional	323	26	32	19	+6
Lakeside, Grays	Major Regional	243	52	48	57	-4
Ipswich	Regional	224	65	49	39	-16
Colchester	Regional	220	67	74	58	+7
Braintree	Sub-Regional	91	297	388	327	+91
<b>Clacton-on-Sea</b>	<b>Sub-Regional</b>	<b>89</b>	<b>303</b>	<b>298</b>	<b>319</b>	<b>-5</b>
Freeport Village, Braintree	Sub-Regional	86	324	354	514	+30
Sudbury	Sub-Regional	75	367	310	352	-57
<b>Clacton Factory Outlet</b>	<b>Minor District</b>	<b>22</b>	<b>1,361</b>	<b>1,721</b>	<b>827</b>	<b>+360</b>
<b>Waterglade Retail Park, Clacton</b>	<b>Minor District</b>	<b>21</b>	<b>1,406</b>	<b>1,526</b>	<b>1,362</b>	<b>+120</b>
<b>Frinton-on-Sea</b>	<b>Minor District</b>	<b>20</b>	<b>1,468</b>	<b>1,623</b>	<b>1,514</b>	<b>+155</b>
<b>Dovercourt</b>	<b>Local</b>	<b>17</b>	<b>1,680</b>	<b>1,526</b>	<b>827</b>	<b>-154</b>
<b>Brook Retail Park, Clacton</b>	<b>Local</b>	<b>15</b>	<b>1,895</b>	<b>1,830</b>	-	<b>-65</b>
<b>Harwich Gateway Retail Park</b>	<b>Local</b>	<b>15</b>	<b>1,895</b>	-	-	-

Source: Venuescore UK Shopping Venue Rankings, 2015, 2010 & 2005.  
Retail facilities in Tendring district shown in bold

- 5.08 As illustrated in the table above, Clacton-on-Sea is the highest ranked centre in the District. It is classed as a Sub-Regional centre by Venuescore and is ranked 303rd of all the centres surveyed, declining five places since 2010. Frinton-on-Sea (ranked 1,468th) and Harwich Gateway Retail Park (1,895th) and Dovercourt (1,680th) are the only other allocated centres within Tendring classed as a Minor District and Local centre respectively, while Waterglade Retail Park (located within the boundaries of Clacton-on-Sea Town Centre) ranked 1,406th and Clacton Factory Outlet ranked 1,361th are classed as a Minor District centre in their own right.
- 5.09 Four designated town centres (Walton-on-the-Naze, Brightlingsea, Manningtree and Harwich) are not identified within the Venuescore index, and the three other shopping destinations that are located in Tendring (Clacton Factory Outlet, Brook Retail Park and Harwich Gateway Retail Park) remain relatively low in the rankings compared to traditionally competing regional and sub-regional centres, notably Ipswich, Colchester and Braintree. Shopping patterns in the Study Area are therefore influenced to some degree by the greater strength, diversity and attractiveness of the retail offer at these higher-order centres.

### Clacton Town Centre

- 5.10 The Clacton-on-sea town centre defined by Goad is similar in extent to the Primary Shopping Area defined by Tendring District Council in the adopted local plan, with the exception of units along Station Road to the north and Pier Avenue to the South (included by Goad). Overall, the adopted Town Centre boundary for Tendring covers a larger area compared to the Goad Plan. For the purposes of the following analysis, the Goad Plan area is taken as a proxy for the town centre retail area. An Experian Goad Plan illustrating the location and use of each unit in the town centre is provided at Appendix C for reference.
- 5.11 Clacton Town Centre is the largest centre in Tendring (by both floorspace and number of units), located on the south eastern coastline of the district. The centre extends from the railway station to the pier and incorporates the Waterglade Retail Park to the west. It is a well connected centre with direct connections to the A133, which runs through the centre of Tendring connecting to the A120 which Harwich and Dovercourt and the A12 links to Colchester.
- 5.12 Clacton is surrounded by a number of smaller local and district centres, as well as out of centre retail destinations at Brook Retail Park, Clacton Factory Outlet and Morrisons, Centenary Way.

### Diversity of Uses

- 5.13 In May 2015, Clacton town centre has a total of 323 units, excluding the non retail trade and service uses, the town centre comprises around 298 units totalling 52,790 sq.m of floorspace. The centre is organised in a linear manner along the High Street, expanding along the five roads: Station Road, Rosemary Road, Jackson Road, Pallister Road and West Avenue, with Pier Avenue through the middle connecting the centre to the Pier and the coastline.
- 5.14 Service activity is particularly concentrated to the north of the High Street with various other service uses spread through the centre, whilst Pier Avenue is dominated by comparison retail uses with a number of seaside leisure uses located closer to the beach. Convenience retail uses are well dispersed throughout the centre, with a Sainsbury's supermarket at the top of the High Street. Clacton has a permanent indoor market on Mondays to Saturdays throughout the year.
- 5.15 We have reviewed the diversity of retail and leisure uses accommodated in the town centre (by number, type and quantum of floorspace provided) and provide our findings below.

**Table 5.2: Clacton Town Centre Diversity of Use for Commercial Units**

	Units (no.)	Units (%)	Units UK Avg. (%)	Floorspace (sq m)	Floorspace (%)	Floorspace UK Avg. (%)
	May 2015		May 2015	May 2015		May 2015
Convenience	17	5.7%	8.5%	4,190	7.9%	15.1%
Comparison	111	37.2%	32.4%	19,940	37.8%	36.1%
Retail Service <sup>1</sup>	43	14.4%	14.2%	6,490	12.3%	7.4%
Leisure Service <sup>2</sup>	67	22.5%	22.5%	12,510	23.7%	23.3%
Financial and Business Service	41	13.8%	10.8%	6,080	11.5%	8.2%
Vacant	19	6.4%	11.3%	3,580	6.8%	9.2%
Total	298	100%	100%	52,790	100%	100%

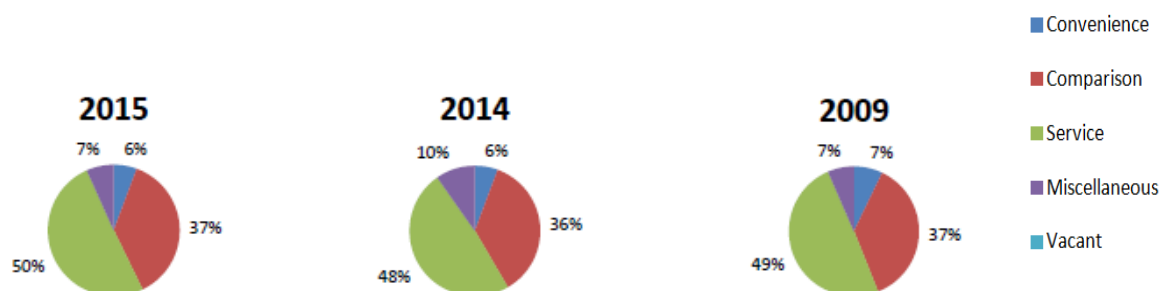
Source: WYG survey of May 2015, based on Experian Goad boundary

Notes:

1. Retail Services includes, 'clothing and fancy dress hire', 'dry cleaners & Launderettes', 'Filling Stations', 'Health & Beauty', 'Opticians', 'Other retail Services', 'Photo Processing', 'Photo Studio', 'Post Offices', 'Repairs, Alterations & Restoration', 'Travel Agents', 'TV, Cable & Video Rental', 'Vehicle Rental', 'Vehicle Repairs & Services', 'Video Tape Rental'.

2. Leisure Services includes 'Bars & Wine Bars', 'Bingo & Amusements', 'Cafes', 'Casinos, Theatres & Concert Halls', 'Clubs', 'Disco, Dance & Nightclubs', 'Fast Food & Take Away', 'Hotels & Guest Houses', 'Public Houses', 'Restaurants', 'Sports & Leisure Facilities'.

- 5.16 The pie chart below shows the change in Clacton's composition in November 2009, April 2014 and May 2015. This data has been provided by Experian and most recently updated by the WYG survey.

**Figure 5.3: Clacton Town Centre Composition in 2009, 2014 and 2015**

Source: Experian Goad, WYG survey and Tendring District Council Retail Study Update September 2010

- 5.17 Tables 5.2 indicate that the current level of convenience stores in the town centre is below the national average level of provision, with the 17 units comprising 5.7% of the stock and providing a total floorspace of 4,190 sq m. Figure 5.3 provides a comparison of town centre composition in 2009, 2014 and 2015. The result shows that there has been a decrease in the number of convenience stores from 22 units in 2009 to 17 units in 2015 (decrease by 1%). The existing provision in the centre consists of national convenience goods retailers Sainsbury's, Holland & Barrett and Greggs, independent butchers, bakers and greengrocers, as well as a significant number of convenience stores run by independent traders in the town centre and the covered market between Rosemary Road and the High Street.
- 5.18 The level of comparison goods units and floorspace in Clacton Town Centre, at slightly above the national average, reflects its role as a mid-level 'Sub-Regional' centre in the Venuescore regional retail hierarchy. The proportion of the number of comparison units has increased from 35.9% (2014) to 37.1% in 2015, which indicates an improving comparison goods offer of the town centre. The presence of a number of high street retailers such as Burton, New Look, Bonmarché, Dorothy Perkins, Peacocks and Marks & Spencer indicate that Clacton serves as a destination for clothes shopping, competing with larger out of town retail facilities. The majority of comparison retailers are located along Pier Avenue and Station Road, in the prime central location to the north of the town square.
- 5.19 Clacton also accommodates a number of lower order stores, including 17 charity shops and discount goods stores located throughout the centre. There has been a steady increase in the provision of service outlets to 151 units, which represents 50.5% of all the units and is above the national average of 47.5%. The proportion of service units remains relatively constant from 2009 to 2015 (49.51% to 48.66% to 50.50%). Service units are well dispersed through the surveyed Town Centre, and there is a particular concentration of leisure units along the southern stretch of Pier Avenue, accommodating a number of beachside amusement arcades.

### Vacancies

- 5.20 The number of vacant units within a centre can provide a good indication of how a town is performing. However, care should be taken when interpreting figures as vacant units will be found in even the strongest of town centres as it is to be expected that there is some 'churn' in the market with units changing representation. On other occasions properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or are simply not being actively marketed. Conversely, a low vacancy rate does not necessarily mean that a centre is





performing well. For example, if there is a proliferation of charity shops and other uses not usually associated with a town centre it may be a sign of decline, particularly where these uses are located in prime locations.

- 5.21 Our site visit of May 2015 identified approximately 3,580 sq m of vacant floorspace across 19 units within the centre. There were 3 vacant units fronting Pier Avenue to the north of the water feature, 3 along the High Street, and 6 along Rosemary Road (one of which, 26 Rosemary Road, is currently under alterations and is the subject of a pending application (Ref: 15/00578/FUL) to provide 26 residential dwellings and 2 retail units). The proportion of vacant units has significantly reduced from 9.7%% (29 units) in April 2014 to the current level of 6.4% (19 units) in May 2015.
- 5.22 The number and floorspace of town centre vacancies is below the national average and we are aware that a number of vacant units have been quickly taken up. We understand from the Council that long term vacant units including 73-75 Pier Avenue are re-occupied by Co-op Travel and Coffee link and this will reduce the vacancy level further to those recorded.

### Customers Views and Behaviour

- 5.23 The household survey undertaken by NEMS sought to identify how frequently respondents visited particular centres and what their views were in respect of the centres they did visit. Clacton Town Centre was the centre frequented by the highest number of respondents with almost half of those questioned across the Sub Region Study Area stating that they visited it on at least one occasion.
- 5.24 We summarise the principal findings of the survey in respect to those questions of relevance to the health of Clacton Town Centre below.

**Table 5.4: Proportion and Frequency of Visits**

Centres	Proportion of respondents who have visited	Centre respondents visit most frequently
Clacton-on-Sea	49.4%	35.3%
Frinton-on-Sea	38.0%	16.3%
Walton-on-the-Naze	28.8%	5.7%
Dovercourt	18.5%	8.1%
Harwich	24.2%	6.4%
Manningtree	29.4%	17.0%
Brightlingsea	25.0%	11.1%
<i>(Don't visit any of these centres)</i>	<i>23.7%</i>	-

Source: Question 26 and 27 of Household Survey 2015, Appendix A

- 5.25 As would be expected, the likelihood of respondents visiting Clacton was directly proportionate to their proximity to the centre, with Zones 2 and 1 providing the highest positive response rate (91% and 87% of all respondents in these zones visited Clacton, respectively).
- 5.26 In total, 81% of respondents in Zone 2 visited Clacton most frequently. However, only 24% of respondents in Zone 1 visited Clacton the most frequently, with 59% visiting Frinton-on-Sea more frequently. This is to be expected as the smaller and more convenient local centres generally meet day to day convenience and service needs.
- 5.27 A significant number of respondents from Zones 5 and 6 visited Clacton more frequently than other centres (27% and 22% respectively), suggesting that Clacton provides a significant day to day function to respondents from these neighbouring zones.
- 5.28 The primary reasons for visiting Clacton across the survey area were jointly identified as the choice and range of shops and that it was close to home (28% of respondents), with the choice of leisure facilities the next most popular response (12%).
- 5.29 In total, 21% of respondents suggested that an increase in the choice and range of shops would encourage them to visit Clacton more frequently, followed by 9% suggesting improvements to parking availability.
- 5.30 In addition, it is important to note that 23.7% of survey respondents indicated that they didn't visit any of seven town centres in Tendring district. The primary reasons identified as 'nothing, no

reason to visit' (51%), 'too far away from home' (33%), 'lack of choice and range of non-food shops' (5%).

### Stakeholder Engagement

- 5.31 When conducting town centre health checks, WYG undertook formal stakeholder engagement with local business representatives to understand our observations more fully in a local context. For Clacton, WYG met with the chairman of the Clacton Town Partnership in June 2015 to discuss the vitality and viability of the town centre, vacancies, mix of retail, parking, street environment, crime and security and the emergence of Town Centre events.
- 5.32 The chairman indicated that whilst an aging population has led to a perceived reduction in spending, it was recognised that Clacton has steadily increased in vibrancy over the past 4-5 years. This is evidenced by the introduction of larger multi-national companies, such as Next, to the Waterglade Retail Park.
- 5.33 Vacant units are generally occupied quickly after becoming available, and there do not appear to have been any significantly adverse impacts on the vitality and viability of the town centre since the Lidl and Aldi stores opened on the edge of town (2004 and 2013 respectively). The chairman also felt that the Sainsbury's supermarket is not well used by local residents and better signage at the High Street may be required to provide directions for the tourists to make them aware of this facility in town.
- 5.34 Town centre events such as the Italian food market (which was touring towns across Tendring District during the week WYG conducted surveys) helped to raise the profile of the town and attracted significant footfall. This was felt to have a beneficial impact on the image and quality of the shopping available in Clacton. Clacton-on-sea also hosts the annual Clacton Airshow and Real Ale and Cider Festival, and in July 2015 hosted the first Sea & Beach Festival. The chairman considered that the town would benefit from the introduction of additional town centre events and attractions to increase the flow of tourists and encourage spending.
- 5.35 The town is seen as clean and well maintained, and residents are appreciative of Tendring District Council's Free Parking Permits, but it is felt that there is not enough roadside space, which impacts the trade of local businesses.
- 5.36 There is evidence of town centre public realm investment, including a water fountain and a central square (opened 2007), which is well used despite previous concerns about water quality.

- 5.37 The Century Cinema was identified as a popular town centre attraction, and is considered an affordable alternative to more expensive out of town leisure destinations. The chairman also considers that Clacton-on-Sea's evening economy is seen to be improving, but is still subject to seasonal demands and competing facilities in Colchester.
- 5.38 The Town Partnership also has concerns about the strong performance of Brook Retail Park, which benefits from a large Tesco store and significant car parking facilities and is widely seen as more convenient than town centre convenience store options, which are used for more of a top-up function than a weekly shop.
- 5.39 The Old Road Gas work site has been identified for comprehensive or phased mixed use development to assist the expansion of the town centre. We understand that an application for a retail development will be submitted to the Council imminently.

### Retailer Representation

- 5.40 The retailer representation indicator is an important sign of the vitality and viability of a centre as it demonstrates the existing and potential future level of operators in the locality. We have reviewed the number of national and independent retailers which are present within Clacton Town Centre, recognising that multiple retailers (such as John Lewis and Primark) can act as anchor tenants in the centre and can add to its appeal and create additional pedestrian footfall.
- 5.41 The Venuescore UK Shopping Venue Rankings has also already been used to identify the retail hierarchy of Clacton and other nearby centres, using a weighted scoring system that takes account of the presence in each location of multiple retailers. As indicated in Table 5.1, the Venuescore ranking identifies Clacton as being a mid-level 'Sub-Regional' centre in the region with a high street retail offer bettered by Ipswich, Colchester and Braintree.
- 5.42 Clacton accommodates 14 of the Top 30 Experian Goad defined major retailers<sup>36</sup> with a number located along the junction of Pier Avenue and Station Road reflecting their important roles within the town centre. The major retailers as identified by Experian Goad that are not present in Clacton town centre include Bhs, Debenhams, House of Fraser, John Lewis, TK Maxx, Tesco, Waitrose, H&M, Next, Primark, River Island, Topman, Topshop, Carphone Warehouse, HMV and Waterstones. The town centre also accommodates a Holland & Barrett convenience store; Peacocks, Mothercare,

<sup>36</sup> Top Experian Goad defined major retailers in Clacton town centre includes Argos, Boots, Burton, Clarks, Clintons, Dorothy Perkins, Marks & Spencer, New Look, O2, Sainsbury's, Superdrug, Vodafone, WH Smiths and Wilkinson)

Bonmarché, EE, Claire's Accessories, Game, Specsavers, Store Twenty One, JD Sports and Sports Direct comparison goods stores, as well as Santander, HSBC, Lloyds, Barclays, NatWest and Nationwide banks and building societies.

### Retail Demand

- 5.43 In May 2015, there were a total of four retailer requirements for Clacton town centre (source: Focus Property Intelligence). These are from Dr China, Cafe Nero, Halfords and Frankie & Benny's. We understand that Halfords and Pizza Hut are already present in Brook Retail Park but Focus indicate that these requirements are from retailers are specific for a prime, in town location. This represents a gross retail floorspace requirement of between 860 sq.m and 1,800 sq.m in Clacton town centre. We also understand from the Council that Home Bargains and TK Maxx also express an interest to locate in Clacton.

### Commercial Rents

- 5.44 Colliers International provides estimated Zone A rents across a number of town centres. Zone A rents relate to the first six metres of floorspace from the shop window.
- 5.45 There has been a general decline in rents over the past five or six years. In Clacton, Zone A rents reduced from a high of £753 per sq m in 2007 to £538 per sq m in 2012 (equating to a reduction of 28.6%). The decline in rents in Clacton has been generally in line with Ipswich (a reduction of 30%). Figure 5.5 indicates that rents in Braintree reduced from £646 per sq m in 2007 to £538 per sq m in 2012 (representing a reduction of 16.7%) whilst Sudbury (a reduction of 4.29%) and Colchester (a reduction of 8.9%) proved more resilient to Clacton. EGI availability report indicates that the current rental level of retail floorspace in Clacton ranges from £127/sq.m (Jackson Road) to £250/sq.m (Pier Avenue).

**Figure 5.5: Zone A Rents in Clacton and Neighbouring Centres Between 2005 and 2012**

Centres	2005 (£/m <sup>2</sup> )	2006 (£/m <sup>2</sup> )	2007 (£/m <sup>2</sup> )	2008 (£/m <sup>2</sup> )	2009 (£/m <sup>2</sup> )	2010 (£/m <sup>2</sup> )	2011 (£/m <sup>2</sup> )	2012 (£/m <sup>2</sup> )	Change between 2007 - 2012
<b>Clacton</b>	<b>£700</b>	<b>£753</b>	<b>£753</b>	<b>£753</b>	<b>£646</b>	<b>£646</b>	<b>£538</b>	<b>£538</b>	<b>-28.6%</b>
Ipswich	£1,561	£1,561	£1,615	£1,615	£1,453	£1,292	£1,238	£1,130	-30.0%
Colchester	£1,668	£1,830	£1,830	£1,830	£1,668	£1,668	£1,668	£1,668	-8.9%
Braintree	£538	£592	£646	£646	£592	£592	£538	£538	-16.7%
Sudbury	£646	£700	£700	£753	£646	£646	£646	£667	-4.29%

Source: Colliers International data, July 2012

### Pedestrian Flows

- 5.46 During our survey of the centre in May and subsequent visits in June and September 2015, we have observed pedestrian activity and considered the levels of footfall across Clacton Town Centre. The greatest levels of pedestrian traffic are evident at the convergence of four roads: Station Road, Rosemary Road, Jackson Road and West Avenue, as well as Pier Avenue through the middle.
- 5.47 Footfall counts for two specific points were provided by Springboard. The first footfall count device was installed at Pier Avenue in July 2014 and a second device was installed at the top of High Street in December 2014. Footfall data collected by Springboard shows that Saturdays tend to attract the highest level of footfall during the week. In addition, Pier Avenue attracts significantly higher footfall compared to the High Street as that is where most of the main retail and service units are located.
- 5.48 It is also evident that the level of footfall in Clacton is higher in summer compared to winter months. The lowest record was in January 2015 with 51,460 weekly counts and the highest record was in early August 2015 with 174,245 counts weekly, three times more compared to the lowest record. This clearly shows that tourist visits create a significant additional footfall during the summer months and therefore influences the vitality and viability of the coastal town.
- 5.49 The footfall also increased significantly when special functions took place in the town centre. For example, a food and drink festival which took place in early July 2015 recorded a high footfall of 153,000 counts for that week compared to an average of approximately 130,000 in June/July.

### Accessibility

- 5.50 The accessibility of a centre is determined by the ease and convenience of access by a choice of means of travel – including that which is provided to pedestrians, cyclists and disabled people – and the ease of access from the main arrival points to the principal attractions in the centre.
- 5.51 The main centre car parks are located off Carnarvon Road behind Sainsbury's (which provides approximately 300 spaces), Wellesley Road (206 spaces), Jackson Road (90 spaces), Colne Road (approximately 70 spaces), seafront bays (50 spaces), Agate Road (24 spaces) and at the Waterglade Retail Park, with additional on-street parking also available along many roads.
- 5.52 Clacton-on-Sea train station located within the boundary of the town centre and within walking distance of the Primary Shopping Area, provides services throughout Tendring, Colchester and central London. According to the NEMS household survey 62.6% of respondents across the survey area travel to Clacton town centre by car, 7.7% by bus, minibus or coach and a further 18.7% walk. Only 1% of respondents travelled to Clacton town centre by train. WYG expect that the train is more likely to be used by tourists or commuters who are not necessarily identified in the household survey.
- 5.53 Overall, we consider that Clacton town centre is highly accessible via various means of transport. Tendring District Council offer a Free Parking Permit to Tendring residents which can be used at all Council-run car parks (except for the Naze and Holland Haven) between 11am and midnight. This new scheme is valid from April 2016 until March 2017 but not for the months of July and August. In addition, all car parking areas offer free parking between 3pm -8am for non-residents. WYG considers that the current car park strategy provides a number of benefits which helps to attract local residents to visit the town centres and support local businesses. It also encourages Tendring residents to travel to different facilities across the District and visit places that they may not otherwise have visited.

### Environmental Quality

- 5.54 Tendring District Council and Essex County Council have taken a proactive approach to improving the public realm by streetscape improvements in the town centre. This has included revising the traffic layout to create a more pedestrian friendly environment. There are also improvements to the pavements and street furniture along Pier Avenue, from West Avenue to Marine Parade, including

better crossings for pedestrians. The Council has recently completed a number of seafront improvement projects (Celebrate-on-Sea) and has several others either underway or being developed as part of its regeneration programme. The Primary Shopping Area of Clacton is attractive with wide street boulevards, street furniture, landscaping and is generally tidy which creates a nice and accessible environment for visitors and residents.

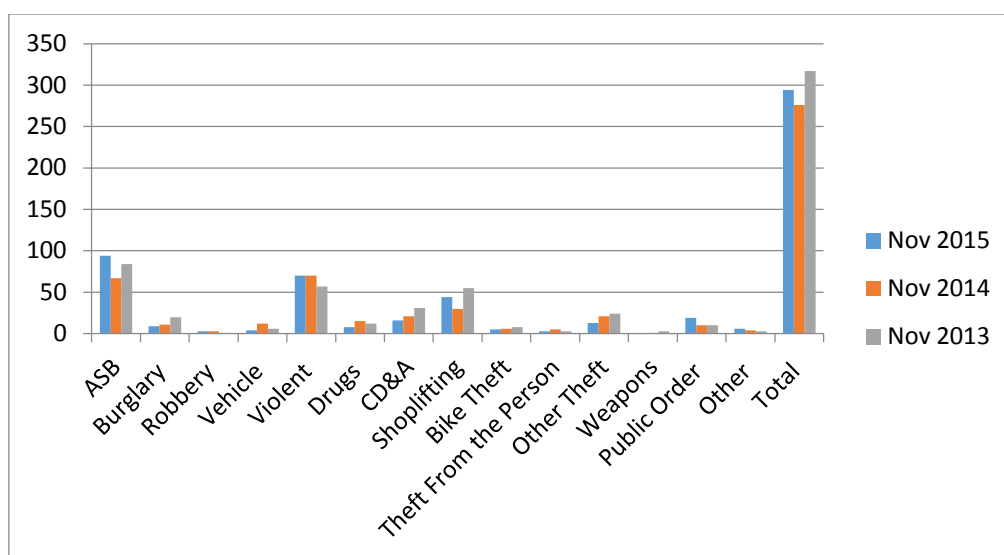
- 5.55 Clacton also contains a few notable buildings of architectural merit including St John's Church and Clacton Pier which are well-maintained iconic buildings that contribute positively to Clacton's image.
- 5.56 It was apparent during our visits to the town centre that there was very little evidence of litter. Litter pickers were also observed and their work appears to be effective at helping to ensure that the centre is well maintained and assisting in ensuring that Clacton remains an attractive centre to visit.

### Perception of Safety and Occurrence of Crime

- 5.57 Our site visits were conducted during daytime and the sense of safety and security within different parts of the town centre is considered to be generally good. The quality of the built environment has a direct link to an area's sense of safety security.
- 5.58 We also obtained crime records for Tendring to gather some empirical evidence in relation to safety. Figure 5.6 indicates that according to the UK Crime Stats, a total of 294 crimes were recorded in November 2015 which has slightly decreased from the same period in 2013 (317 records) but higher than that recorded in 2014.



**Figure 5.6 Crime and Anti-social Behaviour (ABS) between November 2013 to November 2015**



Source: UK Crime Stats

5.59 Comparing the type of crime records in November 2014 and 2015, there was an increase of anti-social behaviour (ASB), shoplifting, public order and other crimes. In particular, there has been a noticeable increase in crime associated with anti-social behaviour in 2015, a 40% increase compared to same period in 2014.

5.60 In relation to location of crime records, the highest records were identified at the junction of Rosemary Road/Jackson Road (19 records) , near Morrisons (15 records), near McDonalds (15 records), Colne Road/Rosemary Road (15 records) and Penfold Road (15 records).

**Figure 5.7: Crime Record for Clacton and Essex (November 2015)**

	ASB	Burglary	Robbery	Vehicle	Violent	Drugs	CD&A	Shoplifting	Bike Theft	Theft From the Person	Other Theft	Weapons	Public Order	Other	Total
Clacton	32.0%	3.1%	1.0%	1.4%	23.8%	2.7%	5.4%	15.0%	1.7%	1.0%	4.4%	0.0%	6.5%	2.0%	100.0%
Essex	29.5%	8.7%	0.5%	7.9%	20.2%	1.5%	9.5%	6.3%	1.4%	1.2%	7.6%	0.6%	4.0%	1.1%	100.0%

Source: UK Crime Stats

5.61 Figure 5.7 shows that the percentage of Clacton crime records relating to ASB, robbery, violence, drugs, shoplifting, bike theft, public order and others are higher than the average in Essex. In particular, Clacton crime rate associated with shoplifting is over 2.3 times higher than the Essex

average.

- 5.62 Within Clacton town centre, there are extensive CCTV cameras operating 24 hours located throughout the centre. A telephone line links the control centre directly to Clacton Police Station so the police can be alerted quickly to potential trouble or they can request the cameras be directed to a certain area. The CCTV control centre is also linked to TenBAC (Tendring Business Against Crime) radio system operated by some of the shops, pubs and clubs within Clacton town centre and control centre staff are able to listen in and offer assistance, including alerting the police if necessary. From our observations during various site visits in May, June and September we consider that Clacton is perceived to be safe physically during daytime trading hours. We consider that the impression of a safe environment is a hugely contributing factor to portraying a positive image of a town and investors' confidence in investment. It is important for the Council to continually review and monitor the position and secure extra funding for CCTV or resources to ensure that any specific areas of regular crime occurrences are dealt with swiftly to ensure any perception of increased crime are minimised.

### Summary on Clacton

- 5.63 Our assessment of Clacton indicates that the town centre performs well in terms of the key NPPG health check indicators.
- 5.64 Clacton has had a relatively steady vacancy rate since 2011, consistently below the national average. A slight reduction in the proportion of convenience goods retailers and an increase in the number of service outlets suggest that Clacton Town Centre is beginning to respond to competition from out of centre destinations, which offer a more convenient retail experience, by providing a more service oriented offer.
- 5.65 Clacton's retail offer is well represented by a range of national multiple comparison units and features almost half of the Top 30 Experian Goad defined major retailers, serving a town centre function across the district.
- 5.66 Clacton town centre is accessible for pedestrians and the overall environmental quality has improved after investment in streetscape at Pier Avenue and the seafront area. From the UK crime stats, there is a concern over raising crime levels which need attention from the Council. There is scope to continue to develop parking initiatives in the town centre to encourage trade to be focused in the town centres.

- 5.67 Overall, we consider that Clacton is a viable and vital town centre which fulfils its role of Major Town centre as designated in the adopted Local Plan.

## Walton-on-the-Naze Town Centre

- 5.68 Walton-on-the-Naze Town Centre is located in Zone 1 of the Sub Region Study Area. The High Street is designated as Primary Frontage for the town centre. The six surrounding streets behind the High Street are the designated Secondary Frontages. Our recent assessment shows that the town centre is the fifth largest town centre in Tendring District, after Clacton, Frinton-on-Sea and Dovercourt. The centre has a lower level of convenience units but a higher level of vacant units compared to the national average. A number of regeneration sites have been identified in the town centre including the Millennium Square car park and the former Town Hall at Mill Lane. If these sites are developed for commercial uses, it would potentially generate footfall and provide linkage to the High Street and encourage linked trips. Overall, it is considered that Walton-on-the-Naze is a healthy centre fulfilling its town centre role in providing essential shopping and services facilities for local residents. A copy of Walton-on-the-Naze Land Use Plan is attached in Appendix C.

## Diversity of Uses

**Table 5.8: Walton-on-the-Naze Town Centre Diversity of Use for Commercial Units**

	Units (no.)	Units (%)	Units UK Avg. (%)	Floorspace (sq m)	Floorspace (%)	Floorspace UK Avg. (%)
	May 2015		May 2015	May 2015		May 2015
Convenience	5	4.8%	8.5%	1,180	10.5%	15.1%
Comparison	37	35.2%	32.4%	2,800	24.9%	36.1%
Retail Service	13	12.4%	14.2%	1,360	12.1%	7.4%
Leisure Service	30	28.6%	22.5%	4,230	37.6%	23.3%
Financial and Business Service	4	3.8%	10.8%	300	2.7%	8.2%
Vacant	16	15.2%	11.3%	1,370	12.2%	9.2%
Total	105	100%	100%	11,240	100%	100%

Source: WYG survey of May 2015, based on Experian Goad boundary

- 5.69 Walton-on-the-Naze is a traditional seaside town and is a predominantly local shopping destination with a high proportion of independent retailers. The centre comprises 105 retail and service units

in total covering 11,240 sq.m (gross) These units are generally located in a linear fashion along the High Street and around the six surrounding streets (Newsgate Street/Suffolk Street/Old Pier Street/Station Street) behind the High Street linking to the Parade.

- 5.70 Walton-on-the-Naze has five convenience stores, including an independent baker, confectionery and 3 convenience stores operated by national retailers (Co-operative Food, Tesco Express and Premier). The percentage of convenience retailers at 4.8% is below the national average of 8.5%. The convenience goods provision remains unchanged since 2014.
- 5.71 Our survey identifies 37 comparison retail units in Walton-on-the-Naze in June 2015 representing 35.2% of the total units, which is slightly above the national average (32.4%). The majority of them are occupied by independent retailers. Closer analysis indicates that there are a high proportion of gift shops (5 units), charity shops (4 units), second-hand shops (4 units), clothing (3 units) and household goods (3 units). The level of comparison goods provision has slightly improved since 2014.
- 5.72 There are 43 retail and leisure service units (41%) in the town centre which is above the national average (37%). There are nine fast foods and takeaways, 8 cafes, 5 restaurants and 5 public houses. Only 3.8% of the total commercial units are for financial and business service uses which is significantly below the national average (10.8%). The level of service floorspace provision has significantly (+3,280 sq. gross) increased since 2014, with 52.4% of the centres composition focused on service provision.
- 5.73 The centre contains 16 vacant units scattered around the town centre i.e. 15.2% of the total units which is a third higher than the national average (11.3%). The number of vacancies has decreased by 3 units since 2014, where the vacancy level was 17.9%, and units have been occupied by a mix of comparison goods, retail service and leisure service uses. However, the level of vacant floorspace (1,370 sq.m) represents 12.2% of the total floorspace and is above the national average of 9.2%, the level of overall vacant floorspace has increased by 30 sq.m since 2014.
- 5.74 The town centre contains a high number of independent retailers but there are also three multiple retailers on the High Street.
- 5.75 Service and community facilities are reasonably well-represented in the centre including a community project information centre, library and a doctor surgery.

### Retail Demand

- 5.76 WYG has found no recorded retail requirements from national marketing sources (Source: Focus Property Intelligence).

### Pedestrian Flows

- 5.77 The High Street is considerably more buoyant with greater pedestrian activity compared to the 6 relay streets behind the High Street.
- 5.78 Pedestrian activity was at a reasonable level when visited around 10am on Monday 1 June 2015. There were significantly higher levels of footfall between Tesco Express (22 High Street) and the Co-operative Food (68 High Street). The street furniture in front of the nursery (former post office) and around the Walton-on-the-Naze Market creates a focal point for the centre.
- 5.79 There is more limited draw at the back of the High Street linking the Pier and the seafront, which feels divorced from the remainder of the centre.

### Accessibility

- 5.80 The town centre is easily accessed via the B1034. The town centre contains on-street parking (no return within 1 hour) which appeared to be in constant use during the site visit. There is a large car park providing 100 spaces at Saville Street.
- 5.81 Walton-on-the-Naze train station is within 5 minutes walk of the town centre. The town centre is served by buses 8, 105 and 107 linking Walton-on-the-Naze to Clacton, Kirby Cross and Thorpe Le Soken.
- 5.82 The centre is considered accessible by a variety of modes of transport.

### Perception of Safety

- 5.83 The town centre offers street lighting but there is a lack of footfall at the back of the High Street linking to the parade reducing the natural surveillance in the area.

The Walton-on-the-Naze Regeneration Framework published in 2010 stated that Walton-on-the-Naze town centre has the highest crime rate within the Walton-on-the-Naze and Frinton-on-Sea area. However, we consider that since the Tesco Express opened in Walton, it generated additional

footfall in the western part of the High Street which has improved sense of safety in the town centre due to increased pedestrian activity.

- 5.84 A good mix of community facilities and restaurants/takeaways helps the centre maintain a degree of activity during evening hours.

### Environmental Quality

- 5.85 The town centre contains important heritage assets and there are significant improvements in the town centre including shop front improvements, pavement widening and the new concrete pavement for the Walton-on-the-Naze Market at Millennium Square.
- 5.86 The High Street is generally tidy, free from litter/graffiti, well maintained, vibrant and welcoming. The sitting area outside the library and the former post office creates a public space in the town centre.

### Conclusion

- 5.87 Walton-on-the-Naze town centre has a large number and mix of convenience, comparison and service units. In terms of number of units, it is the fifth largest town centre in Tendring District, after Clacton, Frinton-on-Sea and Dovercourt.
- 5.88 The centre has a low level of convenience units and a higher level of vacancy rate compared to the national average.
- 5.89 WYG note that the Council outlines a number of potential development schemes in the Walton-on-the-Naze Regeneration Framework. That includes the potential of redeveloping the Millennium Square car park site for a mixed use hotel/residential and retail development. The site is still in use as a street market.
- 5.90 The site of the former Town Hall on Mill Lane has been identified as an opportunity site for redevelopment to act as improved gateway into the town centre. WYG agree that if the site is developed, it could generate extra footfall and provide better linkage to the High Street and encourage linked trips.
- 5.91 The Martello Caravan site is located north of town centre and was closed in 2014. Planning permission was granted for 250 homes, a care home, a GP surgery, a hotel with associated public

house and a fast food restaurant. Subsequently, Tesco pulled out of the new store plan but the aspiration for the site remains the same. In November 2015, planning permission was granted for a foodstore together with associated parking and landscaping was granted (planning reference:15/00666/FUL). The scheme will accommodate a 1,672sq.m gross Aldi foodstore. New planning permission has also recently granted for a mixed use development including a 216 dwelling on a wider regeneration of the Martello Caravan Park.

### Dovercourt Town Centre

- 5.92 Dovercourt Town Centre is in Zone 3 of the Sub Region Study Area. According to Venuescore UK Shopping Venue Rankings, Dovercourt ranked 1,680th in 2015, declining 154 places since 2010. The town centre is the third largest town centre in Tendring District and contains a total of 113 retail and service units across 17,180 sq.m. The trading environment appears buoyant with the recorded vacancy rate lower than the national average and has improved since 2012. The level of comparison goods provision has increased since 2012. The centre could improve its convenience goods function but benefits from a strong service function.
- 5.93 Our assessment of Dovercourt indicates that the town centre performs well in terms of the key NPPG health check indicators.

## Diversity of Uses

**Table 5.9: Dovercourt Town Centre Diversity of Use for Commercial Units**

	Units (no.)	Units (%)	Units UK Avg. (%)	Floorspace (sq m)	Floorspace (%)	Floorspace UK Avg. (%)
	May 2015		May 2015	May 2015		May 2015
Convenience	8	7.1%	8.5%	1,420	8.3%	15.1%
Comparison	34	30.1%	32.4%	4,230	30.4%	36.1%
Retail Service	20	17.7%	14.2%	2,570	15.0%	7.4%
Leisure Service	18	15.9%	22.5%	3,270	19.0%	23.3%
Financial and Business Service	23	20.4%	10.8%	3,140	18.3%	8.2%
Vacant	10	8.8%	11.3%	1,550	9.0%	9.2%
Total	113	100%	100%	17,180	100%	100%

Source: WYG survey of May 2015, based on Experian Goad boundary

- 5.94 Dovercourt town centre is closely associated with Harwich and the International Port situated to the north of the town. In May 2015, the town centre had approximately 113 retail and service units in total which comprise a total 17,180 sq.m (gross) for floorspace the majority of which are located along High Street and Kingsway.
- 5.95 Dovercourt has eight convenience food units and the proportion of convenience units at 7.1% is below the national average of 8.5%. The proportion of convenience goods floorspace is 8.3% which is comparable to the national average of 15.1%. Multiple representations include Co-operative Food and Iceland. The rest of the convenience goods units are operated by independent retailers which include bakers, a delicatessen and off licences. Compared to the last published Experian data, the amount of convenience units reduced from 17 units in 2012 to 10 units in 2015 with small decline in floorspace. A traditional High Street Market is held every Friday, from early morning to early afternoon. The market stalls offer a wide range of fresh meats, fruit and vegetables, ladies fashion and handbags.
- 5.96 The town centre contains a total of 34 comparison units representing 30.1% of the total centre, this compares to the national average of 32.4%. The level of comparison goods provision has increased from 31 (or 27.0%) units in 2012. However, the proportion of comparison offers is still below the national average. The proportion of comparison goods floorspace is 30.4% and has increased slightly since 2012; and is below the national average of 36.1%. The centre provides a



good range of comparison offers including clothing, jewellery, stationery, pet shop, electrical and furniture etc. Multiple retailers include Boots and Superdrug.

- 5.97 In contrast, the centre has a higher proportion (33.2%) of retail, financial and business services floorspace compared to the national average (15.6%) including hairdressers, beauty salon, optician, travel agent, estate agent and banks. The level of such provision has increased slightly since 2012. The proportion of units (38.1%) to these three service sectors is also above the national average (25.0%)
- 5.98 Dovercourt has a good range of leisure services including bingo, gyms and snooker etc. There are also a number of independent cafes and restaurants along the High Street including Station Cafe at the junction of Station Road and High Street and the White Coffee House situated on Kingsway. There is one public house, the Kings Arms in the town centre. The Harwich Library is located at the southern end of town centre.
- 5.99 The recorded vacancy rate is lower than the national average and the trading environment appears buoyant. Since WYG's site visit in May 2015, we understand that JD Wetherspoon has bought the former Co-op building at Kingsway and plans to convert the building into a new pub and hotel.
- 5.100 A copy of Dovercourt town centre land use plan is attached in Appendix C.

### Retail Demand

- 5.101 WYG has found no recorded retail requirements from national marketing sources (Source: Focus Property Intelligence). However, WYG understand from the Council that McDonalds, Dominos, Holland and Barrett and Sainsbury have an interest in Dovercourt and Harwich.

### Pedestrian Flows

- 5.102 Dovercourt town centre functions well, with the station situated at the northern end of the town centre. On our site visit on Monday 1<sup>st</sup> June, a good level of footfall was observed to and from the train station. Whilst the centre was less vibrant towards the outskirts to the east and west of the High Street, there was still significant footfall between Co-operative Food to the west up to the junction with Bay Road.
- 5.103 Pedestrian activity reduced towards the eastern part of the centre.

### Accessibility

- 5.104 A key attraction of Dovercourt is the compactness of the town. The existing attractions, retail offer, transport connections, arrival points and seafront are all sited within relatively close proximity to one another.
- 5.105 Public transport links to the area are good. Dovercourt railway station is within a short walk from the High Street, which provides regular services between Manningtree and Harwich. Connections are also available to Ipswich, Colchester and London. There are also frequent bus services, which operate locally between Harwich and Parkeston Quays and between Harwich and Colchester and Harwich and Clacton. The buses make frequent stops along Dovercourt High Street and at Dovercourt station.
- 5.106 The main car park is at Milton Road (68 spaces) and there is ample on-street parking particularly along Kingsway.

### Perception of Safety

- 5.107 Dovercourt Town Centre is well lit, active and has plenty of natural surveillance. The perception of safety in the centre is generally good. The high levels of activity provide a degree of surveillance which contributes to levels of personal security. There are two large vacant parcels of land at the eastern end (Starlings site) of the centre which reduce the footfall around this area which could reduce the perception of safety at this part of the town centre.
- 5.108 In Dovercourt, CCTV cameras are placed in the town centre and they are linked with CCTV control centre. A telephone link links the control centre directly to Clacton Police Station so the police can be alerted quickly to potential trouble.

### Environmental Quality

- 5.109 'Dovercourt Rediscovered' published in 2011 identified that a poor pedestrian environment was one of the key constraints of the town centre. The priority given to vehicular movement has affected the pedestrian experience and discouraged walking in the town. Poorly configured crossing points and narrow footways make it difficult for pedestrians to navigate the town centre. The town centre has a lack of quality meeting places which offer a range of seating and events space where people can interact, entertain and celebrate.

- 5.110 The town centre contains a number of historic buildings including the Dovercourt Train Station building which is listed Grade II.
- 5.111 Overall, the streets are clean and litter-free, presenting a pleasant environment for visitors.

### Conclusion

- 5.112 Dovercourt town centre is generally a vibrant and healthy centre. It has a good presentation of retail, leisure and services offers. The centre is highly accessible by public transport and the other community facilities attract residents to visit the centre throughout the day and evening.
- 5.113 The vacant Starlings site at the eastern end of the centre represents a major regeneration opportunity and if developed, would enhance the local environment of the town centre. The level of vacant floorspace in the centre has improved since 2012 and is now below the national average.

### Frinton-on-Sea Town Centre

- 5.114 Frinton-on-Sea Town Centre is located in Zone 1 of the Sub Region Study Area. According to Venuescore UK Shopping Venue Rankings, Frinton-on-Sea ranked 1,468 places in 2015, moving up 155 places since 2010. The town centre is the second largest in the district with 133 units covering 19,440 sq.m. The centre has a strong representation of convenience goods and comparison goods provision with a moderate level of services units overall. The proportion of vacant units and floorspace is lower than the national average although we note that the level of vacancies has increased since 2013.
- 5.115 In summary, Frinton-on-Sea is performing well and the centre is demonstrating healthy and strong signs of vitality and viability. The recently opened Sainsbury's Local at Connaught Avenue demonstrates private sector confidence in investment in the town centre.

### Diversity of Uses

**Table 5.10: Frinton-on-Sea Town Centre Diversity of Use for Commercial Units**

	Units (no.)	Units (%)	Units UK Avg. (%)	Floorspace (sq m)	Floorspace (%)	Floorspace UK Avg. (%)
	May 2015		May 2015	May 2015		May 2015
Convenience	17	12.8%	8.5%	2,110	10.9%	15.1%
Comparison	54	40.6%	32.4%	8,970	46.1%	36.1%
Retail Service	18	13.5%	14.2%	2,220	11.4%	7.4%
Leisure Service	20	15.0%	22.5%	2,850	14.7%	23.3%
Financial and Business Service	17	12.8%	10.8%	2,250	11.6%	8.2%
Vacant	7	5.3%	11.3%	1,040	5.3%	9.2%
Total	133	100%	100%	19,440	100%	100%

Source: WYG survey of May 2015, based on Experian Goad boundary

- 5.116 Frinton-on-Sea town centre comprises a total of 133 units covering 19, 440 sq.m.
- 5.117 In May 2015, Frinton-on-Sea had a good range of convenience stores, including a baker, confection, butcher, fishmongers, a greengrocer, a delicatessen and a health food shop. The centre attracts multiple convenience goods retailers including Greggs, Co-operative Food and Holland & Barrett. The proportion of convenience units (12.8%) is significantly higher than the national average (8.5%), but we note that this number has declined since 2013. Notwithstanding this, the proportion of convenience goods floorspace of 2,110 sq.m (10.9%) is well below the national average (15.1%) but has also declined by 2.5% since 2013. It is important to note that the WYG site visit was conducted before Sainsbury's Local opened at 70 Connaught Avenue in July 2015, therefore with Sainsbury's opening, the convenience goods offer has been improved.
- 5.118 Our survey identifies 40.6% of the commercial units (54) are occupied by comparison goods retailers which is higher than the national average of 32.4%, with 46.1% of the floorspace devoted to comparison goods which is above the national average (36.1%). Closer analysis indicates that there are a wide range of comparison offers including clothing (9 units), household goods (3 units), antiques (3 units), carpets and flooring (2 units), charity shops (8 units) etc. There are a considerable number of multiple comparison goods retailers in the town centre including Boots, Rowlands Pharmacy, Peacocks, and Superdrug.
- 5.119 Frinton-on-Sea has a total of 18 retail services (proportionally 13.5%) in the town centre which is

broadly in line with the national average (14.2%). This includes 7 hair salons, 3 beauty salons, 2 opticians and a dry cleaner. The proportion of retail service floorspace (11.4%) is above the national average (7.4%). Frinton-on-Sea has a good range of essential financial and banking services which includes banks, building societies and a post office, which is above the national average in terms of the proportion of units and floorspace. In terms of leisure services, the level of provision proportionally is significantly below the national average in terms of units and floorspace with scope for improvement.

- 5.120 The centre contains seven vacant units scattered around the town centre i.e. 5.3% of the total units which is lower than the national average of 11.3%. With the opening of Sainsbury's Local at Unit 70, the vacancy level has further reduced. Similarly the proportion of vacant floorspace (5.3%) is well below the national average of 9.2%.
- 5.121 The presence of a church, dentist and health centres within the town centre and the easy walking distance to the beach increase the attractiveness of the town centre.
- 5.122 A copy of Frinton-on-Sea town centre land use plan is attached in Appendix C.

### Retail Demand

- 5.123 In May 2015, there was a retail requirement from Screwfix Direct for Frinton-on-Sea town centre (Source: Focus Property Intelligence). The required size was between 325 sq.m to 1,000 sq.m.

### Pedestrian Flows

- 5.124 The centre provides a pleasant environment for pedestrians and the pavements are wide. During our site visit on 22 May 2015, we observed that there was a very healthy level of pedestrian activity along Connaught Avenue, in particular, from Co-operative Food to the north and Boots to the south.
- 5.125 The area further to the north of Queens Road/Old Road appeared to be more distanced from the core centre and had a low level of footfall.

### Accessibility

- 5.126 Accessibility to the centre is good via a choice of means of transport. Bus stops are located along Old Street and in front of 118 Connaught Avenue connecting Frinton-on-Sea to Great Holland and Walton-on the Naze. The Frinton-on-Sea train station is located to the north of the town centre,

approximately 5 minutes walk to the centre.

- 5.127 On-street parking is available along the full length of Connaught Avenue and more on street parking is located along the Esplanade. However, it is noticeable that the centre has no pedestrian crossing points along Connaught Avenue.

### Perception of Safety

- 5.128 Frinton-on-Sea town centre is well lit, active and has plenty of natural surveillance. The perception of safety in the centre is generally good.

### Environmental Quality

- 5.129 Overall, the streets are clean and litter-free, presenting a pleasant environment for visitors. Trees are planted along Connaught Avenue and benches at both ends of Connaught Avenue provide a welcoming environment and encourage people to dwell and move around in the centre.

### Conclusion

- 5.130 Frinton-on-Sea town centre is the second largest town centre in the District. It provides a good representation of retail offers and a considerable amount of essential services to visitors.
- 5.131 In general, Frinton-on-Sea is performing well and we consider that the town centre is healthy and strong. The vacancy level is well below the national average; however, there has been a noticeable increase in vacancies since 2013 which needs to be monitored (vacant floorspace increased from 2.8% in 2013 to 5.3% in 2015). The environment of the centre is of good quality with a good level of footfall. The recently opened Sainsbury's Local demonstrating confidence in private investment in the town centre.

## Harwich Town Centre

- 5.132 Harwich Town Centre is located in Zone 3 of the Sub Region Study Area. It is the smallest designated Town Centre in Tendring District in the adopted Local Plan. The retail, residential and leisure services within the town are fragmented and there are very limited retail services in the town centre with very limited convenience goods offer. The proportion of vacant units is slightly above the national average, indicating that the town centre is underperforming and experiences a acute vacancy problem although it has improved marginally since 2012. Harwich has significantly less pedestrian activity in the town centre. Nevertheless, there are a number of important historic buildings and with the Harwich Harbour located nearby, it brings tourist visitors to the centre. It is important to note that Dovercourt town centre plays an important role in this peninsula, so the town centre designation for Harwich should be reconsidered.

## Diversity of Uses

**Table 5.11: Harwich Town Centre Diversity of Use for Commercial Units**

	Units (no.)	Units (%)	Units UK Avg. (%)	Floorspace (sq m)	Floorspace (%)	Floorspace UK Avg. (%)
	<i>May 2015</i>		<i>May 2015</i>	<i>May 2015</i>		<i>May 2015</i>
Convenience	2	6.1%	8.5%	280	7.3%	15.1%
Comparison	13	39.4%	32.4%	1,390	36.5%	36.1%
Retail Service	3	9.1%	14.2%	290	7.6%	7.4%
Leisure Service	11	33.3%	22.5%	1,400	36.7%	23.3%
Financial and Business Service	0	0.0%	10.8%	0	0.0%	8.2%
Vacant	4	12.1%	11.3%	450	11.8%	9.2%
Total	33	100%	100%	3,810	100%	100%

Source: WYG survey of May 2015, based on Experian Goad boundary

- 5.133 The town centre is focused around Church Street and Market Street. It is noticeable that the commercial units are interspersed throughout the town centre and there is a considerable amount of residential use within the town centre which reduces any sense of commercial cluster.
- 5.134 The centre comprises approximately 33 retail and service units across 3,810 sq.m (gross) which provides a limited retail and commercial offer in the centre. As a town centre, Harwich is noticeably smaller than other designated town centres. There are only two convenience goods

retailers including the Harwich convenience store and Peris grocer comprising just 280 sq.m. This provision remains unchanged since 2008.

- 5.135 Harwich is not a strong comparison retail destination with representation in only a limited number of areas: antique shops, booksellers, gift shop, electrical, second-hand shop and motor cycle sales and repairs. The comparison goods operators are very much linked to the tourism nature of the centre. There are thirteen comparison goods retailers representing 39.4% of the units which is slightly higher than the national average of 32.4%. In terms of comparison floorspace, there is 1,390 sq.m which has declined by 9.3% since 2012 and represents 36.5% of the total floorspace which is in line with the national average of 36.1%.
- 5.136 The centre contains a number of public houses, coffee shops, takeaways and restaurants but there are no financial and business services present in the town centre. The provision of leisure services in terms of number of units and floorspace is well above the national average and has increased since 2012.
- 5.137 There are four vacant units equating to a total of 450 sq.m vacant floorspace in the town centre. The vacancy level at 12.1% (in terms of total units) is above the national average (11.3%). The level of vacant floorspace is also at 11.8% and is above the national average of 9.2%. We note that the level of vacancies have improved moderately since 2012.
- 5.138 The presence of the Guildhall, Electric Palace, the lighthouses and Treadmill Crane provide an important draw for tourists. During our site visit on the afternoon of Monday 1st June, it was noted that there was a considerable number of tourists wandering around the town centre.
- 5.139 A copy of Harwich town centre land use plan is attached in Appendix C.

### Retail Demand

- 5.140 In May 2015, there was a requirement from Dominos Pizza for Harwich town centre (Source: Focus Property Intelligence). The requirement unit size was between 800-1,000 sq.ft for Use Class A5 with parking spaces available.

### Pedestrian Flows

- 5.141 The centre is located within a few minutes walk to Harwich Harbour and we observed tourists arrived from the harbour walking and then navigated towards Kings Head Street and Church Street.



- 5.142 With the residential uses dispersed in the town centre, there are also some pedestrian flows during the daytime, however, Harwich has significantly less pedestrian activity compared to other town centres in Tendring.

### Accessibility

- 5.143 The A120 provides Harwich with a good link road to the western section of the District and beyond. The Harwich Harbour Ferry service is a foot and bicycle ferry that runs during summer from the beginning of April until the end of October between Harwich, Shotley and Felixstowe. This service brought visitors beyond Tendring to Harwich.
- 5.144 The Harwich International Port accommodates two superferries, 'Stena Britannica' and 'Stena Hollandica' which provide overnight sailing from Harwich and from the Hook of Holland on a daily basis. According to Ships Monthly (February 2016), Stena Line recorded 16% year-on-year growth in passenger numbers on this route i.e. 698,000 passengers in 2015. In terms of car volume, the ferry operators transported 158,000 cars in 2015 – 26,000 more than through the full course of 2014. The port also accommodates other cruise ships and in 2016, there were 13 ships, containing 12,500 passengers and 5,000 crew. 2013 was the peak year for the last 5 years with 57 cruises, containing 97,000 passengers and 39,000 crew. It is important to note that for the past three years, Harwich Town Council has financially contributed for a courtesy bus to take crew to Dovercourt town centre and to Harwich Retail Park with a relatively small percentage of passengers visiting Harwich town centre.
- 5.145 There are dedicated car park spaces at Wellington Road (28 spaces) and The Quay (24 spaces) which are both located outside the core town centre area which is then further supported by on street parking throughout the town centre. However, both the bus stops and train station are located outside the town centre.
- 5.146 Accessibility within the town centre generally achieves only a moderate standard. Kings Head Street is narrow with narrow footpaths which creates a less pedestrian friendly environment.

### Perception of Safety

- 5.147 With a high level of vacant units and floorspace in the town centre and poorly maintained frontages, this lowers the perception of safety in the town centre. The centre is interrupted with non commercial uses, which contributes to the centre appearing quiet, this is often compounded with many shops having security shutters installed which adds to an austere commercial

environment. There was little evidence that the centre is unsafe, and there are no obvious areas that may be vulnerable to anti-social behaviour.

### Environmental Quality

- 5.148 The centre has a number of historic buildings, including the Guildhall, the Old Bank Studio and the St Nicolas Church which positively adds to the quality of the built environment. The Harwich Electric Palace cinema which is located on King's Quay Street was opened in 1911. The building is a Grade II\* listed building and contains a unique frontage and much of the original interior is retained and was refurbished in 2009. Harwich's high and low lighthouses were built in 1818, the smaller is a scheduled Ancient Monument. Harwich Redoubt is a circular fort built in 1808 to defend the port of Harwich and is the largest ancient monument in the area.
- 5.149 There is also a small garden opposite the St Nicolas Church which creates a pleasant amenity environment in the town centre.
- 5.150 With a number of vacant units in the centre, cumulatively they detract the overall attractiveness of the town centre.

### Conclusion

- 5.151 Harwich town centre is the smallest designated town centre in Tendring District. The town centre contains a significant amount of non commercial uses at ground level which creates a fragmented retail and commercial frontage in the town centre.
- 5.152 Our health check indicates that the town centre is under performing in a number of health check indicators. The centre has a limited comparison offers which is very much linked to the tourist nature of the centre. There are no financial and business services present in the town centre. The centre has a higher vacancy rate compare to the national average although we note that there have been some modest improvements since 2012.
- 5.153 Nevertheless, the town centre has a number of important historic buildings and with the Harwich Harbour located at the doorstep of the centre, it helps attract visitors to Tendring. It is important to note that there is a strong link between Dovercourt and Harwich. Many visitors arrived at Harwich by cruises and ferries but then visit Dovercourt rather than Harwich. We consider that Harwich is a healthy centre which benefits from tourism related activity but the centre does not perform the full function of a town centre and should be reclassified as a district centre.

## Manningtree Town Centre

- 5.154 Manningtree has traditionally claimed to be the smallest town in England and the centre contains a total of 70 retail and service units covering 12,220 sq.m. The centre has a good representation of independent and multiple retailers, with a very low vacancy rate of just 5.7%. The large Co-operative Food located at the northwest boundary of the town centre is separated from the main part of the town centre. The Railex Site represents a key regeneration site for the town centre and has the potential to deliver a high quality redevelopment. The site was recently sold to a local developer for commercial use.

### Diversity of Uses

**Table 5.12: Manningtree Town Centre Diversity of Use for Commercial Units**

	Units (no.)	Units (%)	Units UK Avg. (%)	Floorspace (sq m)	Floorspace (%)	Floorspace UK Avg. (%)
	May 2015		May 2015	May 2015		May 2015
Convenience	9	12.9%	8.5%	2,560	20.9%	15.1%
Comparison	15	21.4%	32.4%	1,160	9.5%	36.1%
Retail Service	17	24.3%	14.2%	1,500	12.3%	7.4%
Leisure Service	16	22.9%	22.5%	1,700	13.9%	23.3%
Financial and Business Service	9	12.9%	10.8%	4,750	38.9%	8.2%
Vacant	4	5.7%	11.3%	550	4.5%	9.2%
Total	70	100%	100%	12,220	100%	100%

Source: WYG survey of May 2015, based on Experian Goad boundary

- 5.155 Manningtree has a total of 70 units and is the second smallest town centre in Tendring District; it collectively covers 12,220 sq.m of floorspace. It has nine convenience retailers, representing 12.9% of the total units, which is above the national average (8.5%). Three of them are operated by multiple retailers including Tesco, Premier and Co-Operative Food. The proportion of convenience goods floorspace is already well above the national average at 20.9% (national average is 15.1%) due to the big Co-op foodstore at Riverside Avenue East. The level of convenience goods has remained constant since 2011 (loss of one unit and 90 sq.m) and is considered stable.
- 5.156 The town centre contains a total of 15 comparison units which reduced from 19 units in 2011. The

proportion (21.4%) of comparison good units is below the national average (32.4%); whilst the proportion of comparison goods floorspace is very limited at 9.5% compared to the national average of 36.1% and is the lowest of all Tendring town centres. Indeed the quantum of floorspace is the lowest of all the defined centres in Tendring. The range of comparison offer is more limited compared to other town centres and the centre has lost a significant amount of provision since 2011 (minus four units and -270 sq.m of floorspace). The current offer includes clothing, books, chemist, gift, DIY, pet shop, electrical, pets goods etc. Boots is the only multiple comparison goods retailer in town.

- 5.157 In contrast, the centre has a high proportion (24.3%) of retail service offers compared to the national average (14.2%) including undertakers, dry cleaners, health club, hair salon, opticians, travel agents and a post office. The level of provision has increased since 2011 both in terms of units and floorspace. The proportion of retail service floorspace is also above the national average and the quantum of such floorspace has increased since 2011.
- 5.158 Manningtree offers a good range of cafes, restaurants, takeaways and public houses, indeed, the proportion of leisure services (units) is consistent with the national average at 22.5%; however, the proportion of floorspace (13.9%) is well below the national average 23.3%. The White Hart Hotel is located at the heart of the centre. There are a number of financial and business services in the centre and the proportion of such units (12.9%) is well above the national average at 10.8% NatWest (although we understand that the bank was closed in December 2015) and Barclays are both located on the High Street. The proportion of floorspace for financial and business services is 38.9% and the most dominant land use in the town centre reflecting it's service role. The quantum of such floorspace has remained consistent with that found in 2011.
- 5.159 In June 2015, only four units were found to be vacant at the Manningtree town centre, this represents a vacancy rate of 5.7%, less than half of the national average. Judging this low level of vacancies, Manningtree is evidently providing an attractive destination for retailers and businesses.
- 5.160 A copy of Manningtree town centre land use is attached in Appendix C.

### Retail Demand

- 5.161 WYG has found no recorded retail requirements from national marketing sources (Source: Focus Property Intelligence).

### Pedestrian Flows

- 5.162 Pedestrian activity and footfall is concentrated along the Primary Frontages and reduced towards both ends of the centre. We noticed that as the Co-Operative Food is located approximately 300m from the High Street with ample car parking spaces, with on site evidence showing that visitors tend to drive rather than walk between two places, improving pedestrian links might reduce this.

### Accessibility

- 5.163 Manningtree is located on the B1352 which links Mistley and Lawford. There are parking spaces at High Street (10 spaces) and Market Place (10 spaces). Additional parking is available at Quay Street (39 spaces) and at Co-operative Food (120 spaces).
- 5.164 Public transport links to the area are good. The bus stops are located along High Street and Colchester Road providing links to Mistley, Harwich, Ardleigh, Ipswich and Colchester. Manningtree train station is 1.2 km to the west and Mistley train station is 1.4km to the east. Manningtree station provides direct train service to London Liverpool Street station.

### Perception of Safety

- 5.165 There is a good sense of security within the town centre provided by a well maintained environment, free from litter or signs of deterioration.
- 5.166 The use of Market Place car park for a market every Wednesday and Saturday creates a focal point at the town centre. The steady flow of people along High Street offers a good level of natural surveillance in the town centre.
- 5.167 There are a few crossing points on High Street and Station Road which are beneficial to pedestrian safety.

### Environmental Quality

- 5.168 Manningtree has an emphasis on its historic character. There are a number of listed buildings at the heart of the centre. There is street furniture along the High Street with hanging baskets outside shops which create a pleasant town centre environment. The Market Square is landscaped with a high quality water fountain.
- 5.169 The environmental quality on Station Road and Riverside Avenue East is less attractive. The



southern side of the Station Road is mainly in residential use and there is no signage linking the town centre or directing visitors to the foodstore and vice versa.

- 5.170 The large vacant Railex's site (1.77ha) at the junction of Station Road and Riverside Avenue also creates an unattractive environment to the town centre. We understand that the site has been sold to a local developer for commercial redevelopment. Once it is redeveloped, it will improve the current state of the site and the wider town centre.
- 5.171 Overall, the streets are clean and litter-free, showing that it is a safe and pleasant centre to visit.

### Conclusion

- 5.172 Manningtree is a small town with a historic character. The town centre has a healthy range of convenience and service facilities, but a more limited comparison goods role. The centre has a low vacancy rate which indicates the strength of the centre; although we note that the Nat West bank has since closed in December 2015 due to dwindling transactions as reported by Clacton and Frinton Gazette<sup>37</sup>.
- 5.173 In the future, once the vacant Raliex site is re-developed for commercial use, it will improve the current status of the site and regenerate the western part of the centre.

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<sup>37</sup> 'Natwest to shut because of dwindling customers', Clacton and Frinton Gazette, 23 August 2015.

## Brightlingsea Town Centre

- 5.174 Brightlingsea Town Centre is located in the southern part of Tendring District, Zone 4 of the Sub Region Study Area and is the fourth largest town centre. The Primary Frontages run along High Street to Victoria Place. The majority of retail and service uses are provided along High Street and Victoria Place where there is a good level of pedestrian activity. There are a number of multiple retailers in town including Co-operative Food, Spar, Tesco Express and Boots.

### Diversity of Uses

**Table 5.13: Brightlingsea Town Centre Diversity of Use for Commercial Units**

	Units (no.)	Units (%)	Units UK Avg. (%)	Floorspace (sq m)	Floorspace (%)	Floorspace UK Avg. (%)
	May 2015		May 2015	May 2015		May 2015
Convenience	7	9.1%	8.5%	1,510	17.7%	15.1%
Comparison	24	31.2%	32.4%	1,820	21.3%	36.1%
Retail Service	15	19.5%	14.2%	920	10.8%	7.4%
Leisure Service	15	19.5%	22.5%	2,640	30.9%	23.3%
Financial and Business Service	7	9.1%	10.8%	590	6.9%	8.2%
Vacant	9	11.7%	11.3%	1,070	12.5%	9.2%
Total	77	100%	100%	8,550	100%	100%

Source: WYG survey of May 2015, based on Experian Goad boundary

- 5.175 Brightlingsea town contains 77 commercial units which totals 8,550 sq.m.
- 5.176 Brightlingsea town centre has a total of seven convenience units which proportionally represent 9.1% of all the units which is broadly comparable with the national average (8.5%). The proportion of convenience goods floorspace (17.7%) is above the national average at 15.1%. The convenience stores include a baker, butcher, greengrocer, health food and four convenience stores. The town centre benefits from a number of multiple convenience goods retailers including Co-operative Food, Spar and Tesco Express. Whilst the number of convenience goods units has declined from 8 to 7 since 2011, the level of floorspace has increased 980 sq.m to 1,510 sq.m.
- 5.177 Our survey identifies 24 comparison units within the town centre. It represents a total proportion of 31.2% of all the units which is marginally below the national average of 32.4%, but is the most dominant type of land use in the town centre demonstrating the importance of this sector.

However the proportion of comparison goods floorspace (21.3%) is below the national average (36.1%). The centre provides a wide range of comparison goods offers including antique, charity shops, electrical, furniture, clothing, household textiles, carpets & flooring, garden goods, household goods, jewellery and boat accessories etc. Apart from Boots, all other comparison goods stores are operated by independent retailers.

- 5.178 Brightlingsea has a total of 30 retail and leisure services in the town centre which represents 39.0% of all the units which is above the national average (36.7%). The town centre contains two hotels on the High Street (Ye Olde Swan and Brightlingsea Motel), five pubs, three restaurants, four coffee shops/ cafes and three takeaways etc. The level of retail service has remained constant whereas the leisure service has grown by one unit since 2011. The proportion of floorspace (41.6%) to the two sectors is above the national average (30.7%).
- 5.179 Brightlingsea has a good range of essential financial and banking services which includes a bank, estate agents, a solicitor and a glass merchant, although the proportion of units and floorspace is well below its respective national average, and there may be scope for improvement.
- 5.180 The town centre has a total of nine vacant units. The vacancy level (11.7%) is in line with the national average (11.3%). We note that the vacancy rate has reduced slightly since 2011.
- 5.181 On the morning of the WYG site visit on Friday 22nd May 2015, there was an Italian market at Victoria Place which appeared to be a draw for people to visit the town.
- 3.01 A copy of Brightlingsea town centre land use plan is attached in Appendix C.

### Retail Demand

- 5.182 WYG has found no recorded retail requirements from national marketing sources (Source: Focus Property Intelligence).

### Pedestrian Flows

- 5.183 Brightlingsea is a quiet town compared to other centres in Tendring. However, the centre is easily accessible by foot although the pavement is narrow near the bend of the High Street. There is a higher level of pedestrian activity at the western end of High Street near Victoria Place. The shops attracting the most customers were Tesco Express, Boots and around the Italian Market on our day of visit.



### Accessibility

- 5.184 The main car park is located at Victoria Place (25 spaces), in addition, there is limited on street parking spaces along High Street.
- 5.185 Bus stops are located at Victoria Place and Station Road, connecting Brightlingsea to Colchester and Clacton. Having the bus stop at Victoria Place provides an opportunity for waiting passengers and those arriving by bus to visit the shops.
- 5.186 The nearest train station is at Alresford which is approximately 7km north from Brightlingsea.

### Perception of Safety

- 5.187 Victoria Place is landscaped which represents an attractive environment, which is beneficial to the perception of a safe and secure environment.

### Environmental Quality

- 5.188 Brightlingsea represents a pleasant environment, with good standard furniture and landscaping. The High Street has a number of historic buildings and Victoria Place creates a focal point of the town with benches around both island sites. The streets are clean and litter-free, presenting a welcoming environment for visitors

### Conclusion

- 5.189 Brightlingsea is the fourth largest town centre. The High Street and Victoria Place is in traditional linear form and consists of a range of retail and leisure services.
- 5.190 The town centre is relatively healthy with the presence of a number of multiple retailers (mainly convenience). The centre has a good range of convenience, comparison and services. With a town centre event (Italian Market), it helped boost the visitor numbers and attracted more visitors to the town. The centre is highly accessible and has good levels of footfall along the primary frontages

### Summary

- 5.191 As set out in some detail earlier in this section, we consider Clacton town centre to be a generally healthy centre, which performs a vital role for residents of the District and the wider sub-region. Retailer representation in the town centre is strong, with 14 out of 30 major multiple national retailers being represented in the centre. Council initiatives alongside private investment in recent years have together brought about considerable improvements to the built environment, which are clearly beneficial to the town centre's visiting experience.
- 5.192 It is evident from our research and survey of Clacton that the town centre exhibits many of the characteristics of a 'vital' and 'viable' centre and plays an important role in meeting the needs of both residents of Tendring. Its overall vacancy rate is significantly below the national average with relatively few vacancies on the principal shopping streets.
- 5.193 Clacton, Dovercourt, Frinton-on-Sea, Walton-on-the Naze, Brightlingsea, Manningtree and Harwich are seven designated Town Centres in Tendring District. Our latest health check assessment indicates that the majority of the centres appear to be in good health and are performing well. However, Harwich appears to be under-performing with a higher vacancy rate, no financial and business service, limited convenience, low level of pedestrian activity and the commercial units are dispersed within the town centre. WYG would consider that whilst Harwich has a strong tourist influence it does not perform the role and function that is commensurate with a town centre designation and forms more of district centre role.

### 6.0 Population and Expenditure

- 6.01 This section of the report assesses the current population and available expenditure (for both convenience and comparison goods) within the Sub Region Study Area.

#### Study Area Population

- 6.02 The population with each postal code sector and each zone at 2015 has been calculated using Experian Micromarketer G3 data (2014 estimate, which was issued in December 2015) and projected with population growth rate provided by the Council for Zones 1-4. For Zones 5-7, population projections are based on the latest Experian estimates.
- 6.03 For the purpose of this Study, population and expenditure has been calculated at broadly five year intervals from 2015 (the base date) to 2032 in accordance with the emerging local plan and the NPPF (i.e. 2015, 2020, 2025 and 2032).
- 6.04 On this basis, the defined Sub Region Study Area is estimated to contain a resident population of approximately 308,736 people at 2015 rising to 353,637 people at 2032. This represents an increase in population within the Sub Region Study Area of 44,901 people (equating to an increase of 14.5%) between 2015 and 2032. However, if we consider the Tendring district that is covered by Zones 1-4 then the population is estimated at approximately 144,671 at 2015 and is estimated to increase to 164,510 persons by 2032. This represents a population increase of 13.7% over the study period.
- 6.05 Table 6.1 provides a detailed breakdown of the forecast population change within each survey zone in each of the reporting periods to 2032, through five year intervals from 2015, 2020 and 2025.

**Figure 6.1: Sub Region Study Area Population by Survey Zone (2015 to 2032)**

Zone	2015	2020	2025	2032
1	19,658	20,457	21,288	22,354
2	66,576	69,282	72,098	75,706
3	25,526	26,564	27,643	29,026
4	32,911	34,249	35,641	37,424
<b>Tendring Sub-Total</b>	<b>144,671</b>	<b>150,551</b>	<b>156,670</b>	<b>164,510</b>
5	8,009	8,448	8,806	9,250
6	142,526	149,994	156,803	165,426
7	13,530	13,802	14,058	14,451
Total	308,736	332,795	336,337	353,637

Source: Experian Micromarketer G3 data and population growth rate provided by Tendring District Council (December 2015)

## Retail Expenditure

- 6.06 In order to calculate per capita convenience and comparison goods expenditure, WYG has again utilised Experian Micromarketer G3 data which provides detailed information on local consumer expenditure which takes into consideration the socio-economic characteristics of the local population. Experian is a widely accepted source of expenditure and population data and is regularly used by WYG in calculating retail capacity.
- 6.07 The base year for the Experian expenditure data is 2014. Per capita growth forecasts have been derived from Experian Retail Planner Briefing Note 13 which was published in October 2015. Appendix 3 of the Retail Planner Briefing Note identifies the following annual growth forecasts for convenience and comparison goods which inform our assessment.

**Table 6.2: Expenditure Growth Forecasts**

Year	Convenience (%)	Comparison (%)
2015	-0.1	5.3
2016	0.1	3.2
2017	0.3	2.9
2018	0.2	2.7
2019	0.2	2.8
2020	0.1	3.0
2021	0.1	3.2
2022	-0.1	3.1
2023	0.1	3.3
2024	0.2	3.3
2025	0.1	3.1
2026	0.1	3.1
2027	0.1	3.2
2028	0.1	3.1
2029	0.1	3.2
2030	0.1	3.3
2031	0.1	3.2
2032	0.1	3.4

Source: Appendix 3, Retail Planner Briefing Note 13 (October 2015)

- 6.08 The latest growth forecasts suggest that the recovery from the downturn in the economy is well underway, albeit growth in convenience goods expenditure will improve over the medium and long term when compared to the current position. For convenience goods, Experian forecasts -0.1% annual growth at 2015. Whilst there is some deviation in the rate forecast thereafter, the rate of annual convenience goods growth forecast to 2031 broadly follows +0.1%.
- 6.09 By contrast, Experian identifies an immediate and relatively strong annual comparison growth rate of +5.3% at 2015. A drop in the rate of growth to +3.2% is anticipated at 2016, with growth rates thereafter to 2031 forecast to be extremely stable, within the range +2.7% to +3.3%.
- 6.10 Growth in expenditure forecast in the longer term (beyond the next ten years) should be treated with caution given the inherent uncertainties in predicting the economy's performance over time. Assessments of this nature should therefore be reviewed on a regular basis in order to ensure that forecasts over the medium and long are reflective of any changes to relevant available data.
- 6.11 Experian Retail Planner Briefing Note 13 also provides a forecast as to the proportion of expenditure which will be committed through special forms of trading (comprising 'non-store

retailing', such as internet sales, TV shopping and so on) over the reporting period. We 'strip out' any expenditure which survey respondents indicate is committed via special forms of trading and instead make an allowance derived from Experian's recommendation.

- 6.12 In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a physical store's shelves or stockroom (particularly in the case of convenience goods), through initiatives such as 'click and collect'. Accordingly, expenditure committed in this manner acts to support stores and should be considered 'available' to tangible retail destinations.
- 6.13 Accordingly, in order not to overstate the influence of expenditure committed via special forms of trading, we adopt Experian's 'adjusted' figure (provided at Appendix 3 of its Briefing Note) which makes an allowance for internet sales which are sourced from stores. The proportion of expenditure committed through special forms of trading cited below at Table 6.3 is 'stripped out' of the identified expenditure as it is not available to stores within the Sub Region Study Area.

**Table 6.3: Special Forms of Trading Forecasts**

Year	Convenience	Comparison
2015	2.8%	11.7%
2020	4.0%	14.9%
2025	5.0%	15.0%
2032	6.0%	14.5%

Source: Appendix 3, Experian Retail Planner Briefing Note 13 (October 2015)

- 6.14 Based on the above growth rates and special forms of trading allowances, it is possible to produce expenditure estimates for each survey zone under each population growth scenario at 2015, 2020, 2025 and 2032. In doing so, our assessment takes into account both per capita retail expenditure growth and population change.

### Convenience Goods Expenditure

- 6.15 Taking into consideration the above increases in population and per capita expenditure, it is estimated that, at 2015, the resident population of the Sub Region Study Area generates some £633.7m of convenience goods expenditure<sup>38</sup>. This is forecast to increase to £739.3m at 2032, which represents an increase of £105.6m (or 16.6%). The Tendring Zones (Zones 1-4) generate a

<sup>38</sup> Expressed in 2014 prices, as is every subsequent monetary value.

convenience goods expenditure of £301.8m at 2015, increasing to £349.8m at 2032 (an increase of 20%).

**Figure 6.4: Total Available Study Area Expenditure – Convenience (£m)**

	2015	2020	2025	2032	Growth 2015- 2020	Growth 2015- 2025	Growth 2015- 2032
Tendring Study Area (Zones 1-4)	301.8	316.3	330.8	349.8	14.5	29.0	48.0
Sub Region Study Area	633.7	667.1	698.4	739.4	33.3	64.7	105.6

Source: Table 2A, Appendix D

#### Main Food and "Top Up" Shopping

- 6.16 The proportion of convenience goods expenditure which is committed through main food shopping trips and through 'top-up' shopping trips has been estimated with reference to respondents' answers to Question 5 and Question 15 of the household survey, which ask respondents to estimate their weekly main food shopping expenditure and weekly top-up shopping expenditure. We have analysed responses to these questions to derive an estimate of the split between main and top-up expenditure on a zonal basis. Across the whole of the Sub Region Study Area, we calculate (by adding together our estimates of the monetary split between main and top up shopping expenditure within each zone) that the proportion of convenience goods expenditure directed to respondents' main food shopping destination equates to 81.8% of their overall convenience shopping expenditure. The remaining 18.2% of expenditure (which will typically be spent on regular purchases such as milk, bread and so on) is therefore attributed to the respondents' top-up convenience shopping destination. Our estimate of the split between these two types of expenditure on a zonal basis is provided below at Table 6.5.

**Table 6.5: Assumed Split of Convenience Goods Expenditure Between Main and Top-Up Shopping**

Zone	Main Food	Top-Up
1	78.4%	21.6%
2	82.6%	17.4%
3	79.5%	20.5%
4	82.2%	17.8%
<b>Tendring Study Area (Zones 1-4)</b>	<b>80.7%</b>	<b>19.3%</b>
5	81.0%	19.0%
6	82.1%	17.9%
7	82.7%	17.3%
<b>Sub Region Study Area Overall</b>	<b>81.8%</b>	<b>18.2%</b>

Source: Derived from Table 2B, Appendix D

- 6.17 Table 2b of **Appendix D** shows that by applying these estimates to the identified resident population of the Sub Region Study Area, convenience goods expenditure at 2015 committed through 'main food' shopping trips is estimated to be £518.2m and through 'top up' shopping trips is estimated to be £115.5m. The main food expenditure and top up expenditure for the Tendring Study Area is estimated to be £245.7m and £56.1m respectively.

### Comparison Goods Expenditure

- 6.18 For comparison goods, Table 6.6 indicates that, at 2015, we estimate that the resident population of the Sub Region Study Area generates some £879.5m of comparison goods expenditure. Available comparison goods expenditure is then forecast to increase to £1,698.0m at 2032, which represents an increase of £818.6m (or 93.1%) between 2015 and 2032.
- 6.19 For the Tendring Study Area, we estimate that Zones 1-4 generates £399.1m of comparison goods expenditure, increasing to £765.5m at 2032. This indicates a growth of £366.4m (or 91.8%) between 2015 and 2032.



- 6.20 Whilst the identified expenditure increase is very significant in the long term, the rate of growth is more modest than that previously achieved, principally because of the expectation that an ever increasing proportion of comparison goods expenditure will be committed through special forms of trading (most particularly, internet shopping).

**Figure 6.6: Total Available Study Area Expenditure – Comparison (£m)**

	2015	2020	2025	2032	Growth 2015- 2020	Growth 2015- 2025	Growth 2015- 2032
Tendring Study Area (Zones 1-4)	399.1	481.9	584.8	765.5	82.8	185.7	366.4
Sub Region Study Area Total	879.5	1,066.8	1,295.7	1,698.0	187.3	416.3	818.6

Source: Table 8, Appendix D

- 6.21 For the purposes of this study, comparison goods expenditure has been divided into eight sub-categories: 'Furniture', 'DIY', 'Electrical' (these three categories collectively being referred to as bulky goods), 'Clothing & Footwear', 'CDs, DVDs and Books', 'Small Household Goods', 'Toys, Games, Bicycles and Recreational Goods' and 'Health and Beauty/Chemist Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zone by zone basis.
- 6.22 In considering the above, it should be noted that if an excess of expenditure manifests itself within the Study Area, this does not necessarily translate directly into a requirement for additional floorspace. In assessing quantitative need, it is also necessary to take account of:
- Existing development proposals;
  - Expected changes in shopping patterns; and
  - The future efficiency of retail floorspace.

### Conclusion

- 6.23 The Sub Region Study Area is made up of Zones 1-7 with zones 1-4 covering broadly the district boundary.
- 6.24 The Sub Region Study Area has a resident population of approximately 308,736 in 2015, rising to 322,795 by 2020, to 336,337 by 2025 and to 353,637 by 2032. This represents an increase in population within the Sub Region Study Area of 14.5% between 2015 and 2032.
- 6.25 For Zones 1-4, the population growth between 2020 to 2032 would be approximately 19,839, an increase of 13.7%.
- 6.26 It is estimated that, at 2015, the resident population of the Sub Region Study Area generates some £633.7m of convenience goods expenditure. This is forecast to increase to £739.4m by 2032, which represents an increase of £105.6m (or 16.7%) between 2015 and 2032. For Tendring district itself, represented by Zones 1-4 of the Sub Region Study Area, the estimated total available convenience goods expenditure at 2015 is £301.8m, which is forecast to increase to £349.8m at 2032 (15.9%).
- 6.27 In 2015, the resident population within the Sub Region Study Area is identified as generating £879.5m of comparison goods expenditure. This is expected to increase to £1,698.0m by 2032. This represents an increase of £818.6m (or 93.1%) between 2015 and 2032. This increase is a result of the forecast increase in catchment population and, in particular, the forecast level of comparison goods expenditure growth over forthcoming years. For Tendring district, the total available comparison goods expenditure is £399.1m at 2015, increasing to £765.5m at 2032 (91.8%).

### 7.0 Retail Capacity in Tendring District

- 7.01 We have examined the need for new convenience and comparison goods floorspace for 2015, 2020, 2025 and 2032. At the outset, it is important to note that an assessment in the long term should be viewed with caution, due to the obvious difficulties inherent in predicting the performance of the economy and shopping habits over time. In any event, any identified capacity should not necessarily be viewed as justification of new retail floorspace outside of centres as this could prejudice the implementation of any emerging town centre redevelopment strategies and the development of more central sites which may be currently available or which could become available over time.
- 7.02 A complete series of quantitative capacity tables are provided at **Appendix D** to provide further detail in terms of the step-by-step application of our Study methodology.

#### Capacity Formula

- 7.03 For all types of capacity assessment, the conceptual approach is identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) (allowing for population change and retail growth) *less* Turnover (£m) (allowing for improved 'productivity') *equals* Surplus or Deficit (£m).
- 7.04 **Expenditure (£m)** – The expenditure element of the above equation is calculated by taking the population within the defined catchment and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The expenditure is estimated with reference to a number of factors, namely:
- Growth in population;
  - Growth in expenditure per person per annum; and
  - Special Forms of Trading (e.g. catalogue shopping / internet).
- 7.05 **Turnover (£m)** – The turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using Mintel Retail Rankings and Verdict UK Grocery Retailers reports – independent analysis which lists the sales density for all major multiple retailers.

- 7.06 **Surplus / Deficit (£m)** – This represents the difference between the expenditure and turnover figures outlined above. Clearly, a surplus figure will represent an under provision of retail facilities within the Study Area (which, all things being equal, would suggest that additional floorspace is required), whereas a deficit would suggest a quantitative overprovision of retail facilities.
- 7.07 Although a surplus figure is presented in monetary terms, it is possible to convert this figure to provide an indication of the quantum of floorspace which may be required. The level of floorspace will vary dependent on the type of retailer proposed and the type of goods traded. For example, in the case of comparison goods, electrical retailers such as Currys (which is considered a bulky goods retailer) have a much higher sales density than other bulky goods retailers, such as B&Q.

### Capacity for Future Convenience Goods Floorspace

- 7.08 In order to ascertain the likely need for additional convenience goods floorspace in Tendring, it is first necessary to consider the performance of the current provision. Given the geography of the District and its reasonably strong retention of convenience goods expenditure, it is assumed that the future convenience goods expenditure available to Tendring will be commensurate with its current market share.

**Table 7.1: Convenience Goods Trading Performance at 2015**

Destination	Net Convenience	Sales Density	Benchmark Turnover	Survey Turnover	Inflow	Estimated Survey	Overtrading
	Sales Area (sq m)	(£ per sq m)	(£m)	(£m)	Allowance	T/O with Inflow	(£m)
	(A)	(B)	(AxB)		(%)	(£m)	
<b>Zone 1 (Frinton and Walton)</b>							
<b>Frinton Town Centre</b>							
Co-op, Connaught Avenue, Frinton	312	8,267	2.6	2.9	5.0	3.4	0.8
Frinton on Sea Town Centre	-	-	0.8	0.8	5.0	1.2	0.5
<b>Walton Town Centre</b>							
Co-op, 74 High Street, Walton on the Naze	273	8,267	2.3	2.1		2.1	-0.2
Tesco Express Walton on the Naze	287	12,277	3.5	1.6		1.6	-2.0
Walton-on-the-Naze Town Centre	-	-	0.4	0.4	5.0	0.9	0.5
<b>Zone 2 (Clacton, Little Clacton, Jaywick)</b>							
<b>Clacton Town Centre</b>							
Sainsbury's, High Street, Clacton	1,318	12,871	17.0	8.9	15.0	10.3	-6.6
Marks & Spencer, Pier Avenue, Clacton	619	11,749	7.3	1.8	15.0	3.3	-4.0
Clacton Town Centre	-	-	1.1	1.1	15.0	2.5	1.5
<b>Others</b>							
Morrisons, Waterglade Retail Park, Clacton	2,139	13,586	29.1	31.9	5.0	32.4	3.3
Morrisons, Centenary Way	2,004	13,586	27.2	43.6	5.0	44.1	16.8
Tesco, Brook Retail Park	3,326	12,277	40.8	42.5	5.0	43.0	2.1
Farmfood, Valleybridge Road	496	6,016	3.0	0.3		0.3	-2.7
Co-op Bull Hill Road	1,815	8,267	15.0	0.6		0.6	-14.4
Iceland, Waterglade Retail park, Clacton	444	7,727	3.4	2.6		2.6	-0.9
<b>Zone 3 (Harwich, Dovercourt, Thorpe Le Soken)</b>							
<b>Dovercourt Town Centre</b>							
Co-op, High Street, Dovercourt	162	8,267	1.3	0.3		0.3	-1.1
Iceland, 246/250 High Street, Dovercourt	375	7,727	2.9	1.4		1.4	-1.5
Dovercourt Town Centre	-	-	0.6			1.1	0.5
Harwich Town Centre	-	-	0.5	0.5	5.0	1.0	0.5
<b>Others</b>							
Asda, Main Road, Dovercourt, Harwich	1,177	14,106	16.6	10.3		10.3	-6.3
Lidl, Parkstone Road, Harwich	913	3,522	3.2	6.1		6.1	2.9
Morrisons, Iconfield Park, Garland Road, Harwich	1,780	13,586	24.2	33.4		33.4	9.2
<b>Zone 4 (Manningtree and Brightlingsea)</b>							
<b>Manningtree Town Centre</b>							
Co-op, Riverside Avenue, Manningtree	977	8,267	8.1	7.3		7.3	-0.8
Tesco Express, High Street, Manningtree	214	12,277	2.6	1.5		1.5	-1.1
<b>Brightlingsea Town Centre</b>							
Co-op, Station Road, Brightlingsea	444	8,267	3.7	0.1		0.1	-3.6
<b>Others</b>							
Co-op, 4 Acacia Court, Blenheim Close, Brantham, Manningtree	157	8,267	1.3	3.4		3.4	2.1
Co-op, Samson Road, Brightlingsea	1,059	8,267	8.8	1.7		1.7	-7.0

## Notes:

- a. Gross floorspace generally derived from Storepoint database of grocery retailers and Retail Study 2010, unless more specific information available
- b. Net floorspace derived from Storepoint/IGD/RS2010 data where available or based on WYG professional judgement (generally assumed to be 70% of gross floorspace for smaller stores where not specifically known)
- c. Sales densities relate to the monetary turnover of each square metre of net sales area and are derived from Verdict 2014 reports or Mintel Retail Rankings 2015
- d. It has been assumed that all unnamed convenience stores within a centre and independent stores are 'trading at equilibrium' (i.e. their 'benchmark' turnover equates to that identified by the survey)
- e. Survey derived performance of stores calculated by adding together 'main' and 'top up' turnover as set out in Table 4
- f. 2014 prices  
Source: Table 5 of Appendix D

- 7.09 Table 7.1 sets out the current convenience goods trading position in Tendring compared against the 'benchmark' (or anticipated) turnover of existing convenience goods floorspace at the current year. The table only shows the convenience facilities for six defined town centres and other major foodstores at out of centre locations. A comprehensive list for all major convenience good facilities is shown at Table 5 in Appendix D. The 'benchmark' turnover differs for each operator based on its average turnover per square metre throughout the country. Although robust up-to-date information is available in terms of the convenience goods floorspace provided by large, medium and small foodstores, it can be more difficult to quantify the extent of local often independent convenience provision as there is no single comprehensive database to rely upon (beyond the GOAD information). Where we have been unable to verify the exact quantum of floorspace provided by existing smaller-scale convenience stores, we have assumed that these stores are trading 'at equilibrium' (i.e. the survey-derived turnover equates to the expected level of turnover).
- 7.10 For each convenience goods retail destination, consideration has been given as to whether any of its turnover is likely to be derived as 'inflow' from outside Tendring Study Area (Zones 5 – 7) and outside the Sub Region Study Area (beyond Zone 7). Any inflow from beyond the Sub Region Study Area is likely to be related to tourism or related day, weekend or holiday visitor spend, which will be incidental to those trips and may be difficult to quantify, whereas inflow from the wider Sub Region Study Area may relate to travel to work habits and brand preference which may not necessarily be available in the immediate vicinity. However, the Sub Region Study Area is very extensive in its scope and we consider it unlikely that residents of areas further afield (such as Ipswich, Braintree, and Maldon) will travel to Tendring in very significant numbers to undertake food shopping. Notwithstanding this, we consider that convenience goods retailers in the town centre and food superstores within the Tendring administrative area will benefit from some trade which results from visitors and commuters from outside the Sub Region Study Area (Zones 1-7).

- 7.11 In relation to inflow, it is important to assess the volume of tourist and tourist spending in Tendring district. Tourism is an important asset to Tendring as it was worth more than £354m to Tendring in 2014.<sup>39</sup> Tourists visiting the district can bring a significant spending in the district supporting shops, cafes and restaurants. An economic impact research titled "Economic Impact of Tourism 2014 Results" prepared by Destination Research showed that the total spend of visitors was £248.6m of which £48.7m of this direct visitor expenditure was on shopping (20%). In order to disaggregate the visitor spend on retailing into expenditure on convenience goods and comparison goods shopping, WYG assume visitors would spend 80% and 20% on comparison and convenience goods respectively<sup>40</sup>. This gives a figure of around £39.0m on comparison spend and around £9.7m on convenience spend in 2014.
- 7.12 Comparing the available tourist spending to the residents' expenditure in Tendring district area, this represents approximately 10.3% and 3.2% of the 2014 resident's expenditures on comparison and convenience goods respectively. We consider that this is a significant additional available expenditure and therefore would include this additional spend in estimating new floorspace capacity. However, the level of tourist spending is largely determined by a number of wider economic behaviours and it is therefore difficult to predict with any degree of certainty any future changes in medium to long term. We therefore recommend that the Council regularly monitor and review estimated tourist spend to the district as it will ultimately affect the trading performance of the district's retail and leisure facilities.
- 7.13 Our assessment is based upon a 'goods based' approach, which disaggregates expenditure by category type, and it is important to recognise that major foodstore operators generally sell an element of non-food goods such as books, compact discs, clothing and household goods. To account for this, the typical ratio between convenience/comparison goods provision for each operator<sup>41</sup> has been applied to the estimated net floorspace of each foodstore<sup>42</sup>. This provides an indication of the likely sales area dedicated to the sale of convenience goods at each store.

<sup>39</sup> 'Economic Impact of Tourism 2014 Results', Destination Research 2014.

<sup>40</sup> Visitor surveys carried out by Colliers CRE in other town and cities indicate that the vast majority of visitor spend is on comparison goods (typically up to 70-90%). We therefore apply the assumption that visitors would spend 80% and 20% on comparison and convenience goods respectively.

<sup>41</sup> Derived from Verdict UK Food & Grocery 2014 Company Briefing Reports. Where Verdict data is not available or is considered not to appropriately reflect how a store trades in practice, we have applied professional judgement in the manner set out in the notes to Table 5 of Appendix D

<sup>42</sup> Net sales areas have been sourced from Institute of Grocery Distribution data where available. Where such data is not available, we have applied professional judgement in the manner set out in the notes to Table 5 of Appendix D

- 7.14 Whilst survey results are commonly accepted as a means by which to identify existing shopping patterns, their findings should be treated with a 'note of caution' as they tend to have a bias towards multiple retailers and, as a consequence, may understate the role of smaller grocery stores and independent retailers. Especially in rural areas, residents may use local stores more often than main supermarkets as it would be closer to home.
- 7.15 The individual performance of each of the main convenience goods facilities is identified at Table 5 of **Appendix D**.
- 7.16 Our assessment identifies that taking all convenience goods retail facilities in the District area together, the actual identified survey-derived turnover of £257.7m is lower than the benchmarked turnover of £282.9m per annum at 2015. This suggests that, taken cumulatively, existing convenience goods retailers in Tendring Study Area are 'undertrading' when compared to expected turnover. A closer analysis shows facilities in Zone 4 are trading significantly lower than the anticipated benchmark level. As indicated in Table 4 of **Appendix D**, one of the reasons for lower trading performance of facilities in Zone 4 is a large proportion of residents shopped at various facilities in Colchester including Tesco Extra, Highwoods, Tesco, Greenstead Road (The Hythe) and Asda Turner Rise Retail Park (a total of £20.9m). Indeed, our earlier table 4.3c shows that there is £39.8m of convenience goods expenditure that is generated in Zone 4 that is being spent at convenience goods facilities outside Tendring Study Area and there may be scope for some level of claw back of this expenditure if an appropriate and improved retail offer could be secured in and around the main settlements in Zone 4.

### Convenience Goods Quantitative Need in Tendring District

- 7.17 Table 7.2 indicates that, after taking into consideration future increase in both population and expenditure, an effective convenience goods expenditure deficit of -£15.5m is identified at 2015. By 2020, after increases in population and expenditure are considered against increases in floorspace productivity<sup>43</sup>, we estimate that this will shift to an expenditure surplus and increase to +£0.2m (still based on a constant market share of 40.7%). By 2025, we estimate that the expenditure surplus will be £14.2m, increasing thereafter to £30.9m at 2032.

<sup>43</sup> Account has been made for the turnover efficiency of existing convenience goods floorspace to change (on the basis that operators have historically been able to make their existing floorspace more productive over time) in accordance with the projections set out in Table 4a of Experian Retail Planner Briefing Note 13.



**Table 7.2: Quantitative Need for Convenience Goods Floorspace in Tendring District**

Year	Benchmark Turnover of Existing Stores (£m) <sup>1</sup>	Available Expenditure (£m) <sup>2</sup>	Tendring District Inflow (£m)	Surplus Expenditure (£m)
2015	282.9	257.7	9.7	-15.5
2020	280.6	271.2	9.6	0.2
2025	279.2	283.9	9.5	14.2
2032	279.2	300.6	9.5	30.9

Source: Table 6A of Appendix D

<sup>1</sup> Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4a of Experian Retail Planner 13 (October 2015)

<sup>2</sup> Assumes constant market share of Sub Region Study Area expenditure (40.7%) claimed by facilities across the District 2014 Prices

- 7.18 We estimate that extant retail planning permissions<sup>44</sup> would, if implemented, provide an estimated 2,623 sq m of net convenience goods sales floorspace across the District. As set out at Table 6d of **Appendix D**, we estimate that these commitments will have a combined benchmark turnover of £30.8m at 2015. However, we understand that the approved Asda scheme at Bull Hill Road (planning reference: 14/00537) would replace the existing Co-operative store on site. Therefore the convenience goods floorspace is not 'new' although the sales density associated with the new floorspace would be higher for Asda compared to the Co-operative store. In order to avoid double counting. We only account for the increased potential turnover of the approved Asda store (i.e. £4.2m). After taking account of commitments, a deficit expenditure of -£17.7m is identified at 2020, shifting to a residual of +£12.8 by 2032. We then convert this to a potential floorspace capacity by adopting suitable average sales densities. No quantitative capacity up to 2025 has been identified after average sales density have been accounted for, therefore there is no requirement to proactively plan for new development in the short to medium term. Adopting this methodology, we conclude that there is potential capacity for new convenience goods floorspace in the District of between 980 sq m net and 1,850 sq m net by 2032. Our results are summarised in Table 7.3 below.

<sup>44</sup> As advised by Tendring District Council

**Table 7.3: Quantitative Need for Convenience Goods Floorspace in Tendring District**

Year	Convenience Goods				
	£m			Floorspace Requirement (sq m net)	
	Surplus (£m)	Commitments (£m)	Residual (£m)	Min <sup>1*</sup>	Max <sup>2*</sup>
2015	-15.3	18.1	-33.7	-2,550	-4,810
2020	0.4	17.9	-17.7	-1,350	-2,550
2025	14.2	18.0	-3.8	-290	-550
2032	30.9	18.1	12.8	980	1,850

Source: Table 6c of Appendix D

<sup>1</sup> Average sales density assumed to be £13,210 per sq m at 2015 (based on the average sales density of the leading four supermarket operators as identified by Verdict 2014)

<sup>2</sup> Average sales density assumed to be £7,000 per sq m which is based on WYG's knowledge of discount operators

<sup>3</sup> Allows for increased turnover efficiency as set out in Table 4a of Experian Retail Planner 13 Addendum

4. Rounded to nearest 10 sq.m

- 7.19 When considering the above capacity on an individual town basis, Table 7.4 below sets out the residual convenience expenditure capacity in Clacton, Frinton-on-Sea, Harwich, Dovercourt, Brightlingsea, Manningtree and Walton-on-the-Naze taking account the turnover requirements of the extant commitments for new convenience retail floorspace. We have assumed that all of the estimated convenience turnover of the commitments will be drawn from the correspondence centre (i.e. £4.2m turnover requirements of the commitment in Clacton which will all be drawn from expenditure within Clacton and so on).
- 7.20 In Clacton, the Asda foodstore is expected to absorb over 60% of the surplus expenditure capacity at 2020, leaving a small convenience expenditure residual of £2.6m, rising to £11.1m in 2025 and £21.3m at 2032. Table 7.4 then converts the residual expenditure into a floorspace requirement and shows that the residual expenditure would be sufficient to support a small supermarket between around 850 sq.m and 1,610 sq.m net convenience floorspace in the period up to 2025, increasing between 1,630 sq.m and 3,080 sq.m net convenience floorspace in the period up to 2032. The minimum figure is based on the identified need being met through the delivery of a new foodstore by one of the leading supermarket operators (Tesco, Sainsbury's Morrison's or Asda) and the maximum figure relates to need being met by independent or discount operators, which generally achieve lower sales densities. In reality, single independent or discount operators are unlikely to deliver the maximum floorspace requirement identified for Clacton.



- 7.21 In Manningtree, the analysis shows that there is a floorspace requirement between 90 sq.m and 170 sq.m up to 2020 which will increase to 210 sq.m to 400 sq.m at 2032. This identified floorspace requirement could be provided by a form of small local convenience stores.
- 7.22 In Harwich and Dovercourt, it is identified that there is a need for convenience goods floorspace between 770 sq.m and 1,450 sq.m up to 2032. This could be provided in a form of a small discounter or a 'local' format store.
- 7.23 In Frinton-on-Sea, Brightlingsea and Walton, the deficit negates the requirement to provide any new convenience floorspace requirement up to 2032. Accordingly, there is no quantitative need for additional convenience goods floorspace even over the longer term, given the current performance and choice and range of facilities available to local resident population. WYG would conclude that there is no demonstrable requirement to plan for new convenience good floorspace in these centres, beyond those already consented; however, this position should be regularly monitored.

**Table 7.4: Residual Quantitative Capacity for Additional Convenience Goods Facilities in Defined Town Centres Floorspace Post Implementation of Commitments**

Year	Convenience Goods Expenditure			Floorspace Requirement (Net)	
	Surplus £m	Commitments <sup>1</sup> £m	Residual £m	Min <sup>2*</sup> sq.m	Max <sup>3*</sup> sq.m
<b>Clacton</b>					
2015	-2.8	4.2	-7.0	-530	-1,000
2020	6.8	4.2	2.6	200	370
2025	15.3	4.2	11.1	850	1,610
2032	25.5	4.2	21.3	1,630	3,080
<b>Frinton-on-Sea</b>					
2015	-1.0	2.9	-3.9	-300	-560
2020	-0.1	2.9	-3.0	-230	-430
2025	0.8	2.9	-2.2	-170	-310
2032	1.7	2.9	-1.2	-90	-170
<b>Harwich and Dovercourt</b>					
2015	0.3	0.0	0.3	20	40
2020	3.6	0.0	3.6	270	510
2025	6.5	0.0	6.5	500	940
2032	10.0	0.0	10.0	770	1,450
<b>Brightlingsea</b>					
2015	-11.2	0.0	-11.2	-850	-1,610
2020	-10.9	0.0	-10.9	-840	-1,580
2025	-10.7	0.0	-10.7	-820	-1,550
2032	-10.5	0.0	-10.5	-800	-1,520
<b>Manningtree</b>					
2015	0.4	0.0	0.4	30	60
2020	1.2	0.0	1.2	90	170
2025	1.9	0.0	1.9	150	280
2032	2.8	0.0	2.8	210	400
<b>Walton</b>					
2015	-2.1	10.8	-12.9	-980	-1,840
2020	-1.8	10.7	-12.5	-950	-1,800
2025	-1.6	10.7	-12.3	-940	-1,780
2032	-1.3	10.8	-12.1	-930	-1,750

<sup>1</sup> Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 13 (October 2015)

<sup>2</sup> Average sales density assumed £13,211 per sq.m (based on the average sales density of the leading four supermarkets as identified by Verdict 2014)

<sup>3</sup> Average sales density assumed to be £7,000 per sq.m

Rounded to the nearest 10 sq.m

At 2014 prices

### Capacity for Future Comparison Goods Floorspace

- 7.24 Turning to comparison goods capacity, it is first important to note that our methodology deviates from that which has been deployed in respect of convenience goods for two principal reasons. Firstly, it can be extremely difficult to attribute an appropriate benchmark turnover to existing comparison goods provision. Secondly, there tends to be greater disparity between the trading performance of apparently similar comparison goods provision depending on its location, the character of the area and the nature of the catchment. As a consequence, we adopt the approach with comparison goods floorspace that it is trading 'at equilibrium' (i.e. our survey derived turnover estimate effectively acts as benchmark) at 2015.
- 7.25 We assume that there is therefore a nil quantitative need for any additional floorspace across the District at 2015. Once again, it has generally been assumed that the future performance of Tendring's facilities will be commensurate with its current market share. However, we do consider that some of the Tendring's retail units will attract custom from beyond the Sub Region Study Area due to tourist nature of this coastal area. Accordingly, we have assumed that some facilities attract an additional turnover from outside of the Sub Region Study Area (Table 25, **Appendix D**). The inflow allowance has the net effect of increasing Tendring's identified survey derived turnover from £206.6m to £247.6m at 2015 (inflow therefore representing 16.6% of total turnover). The inflow of expenditure from Zones 5-7 to facilities in Tendring's is estimated at £4.1m at 2015 and is somewhat limited. The £206.6m of comparison goods expenditure claimed from inside the Sub Region Study Area at 2015 equates to a market share of 23.5% of all comparison goods expenditure generated by residents of the Sub Region Study Area. Our assessment 'rolls forward' this market share to examine the likely level of comparison goods floorspace required to maintain the role and function of Tendring's retail facilities. In addition and drawing on the visitor information, we estimate that a further £41.1m is spent at comparison goods facilities across the district, we estimate that this equates to 19.9% of the current trade retention at 2015; however, to note that the inflow figure is not rolled forward as it assumed that the inflow ratio will not necessarily grow linked to any local population or expenditure growth as the level of tourism spend is linked to wider economic circumstances and visitor numbers which we have assumed will grow over the plan period by approximately 2% per annum. However, we recommend that this situation should be regularly reviewed and monitored as it can be subject to annualised changes due to both national and international economic circumstances

### Comparison Goods Quantitative Need in Tendring

- 7.26 By 'rolling forward' this market share and making provision for inflow from tourists spending, we estimate that facilities in Tendring District will attract £276.1m of comparison goods expenditure at 2020, increasing to £304.2m at 2025, and to £349.4m at 2032 based on a continuation of Tendring's current Sub Region Study Area market share.

**Table 7.5: Quantitative Need for Comparison Goods Floorspace in Tendring District**

Year	Total Turnover of Existing Stores (£m) <sup>1</sup>	Available Expenditure (£m) <sup>2</sup>	Tendring district Inflow (£m)	Surplus Expenditure (£m)
2015	247.6	206.6	41.1	0.0
2020	276.1	250.6	45.5	19.9
2025	304.2	304.3	50.6	50.7
2032	349.4	398.8	58.9	108.3

Source: Table 26A of Appendix D

<sup>1</sup> Turnover of existing stores to increase in line with improvements in turnover efficiency set out in Table 4b of Experian Retail Planner 13, October 2015)

<sup>2</sup> Assumes constant market share (23.5%) claimed by facilities within the Sub Region Study Area 2014 Prices

- 7.27 Given the forecast increases in comparison goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2020 there will be an expenditure surplus of £19.9m to support additional comparison goods floorspace within the District. As set out in Table 7.5, this surplus is forecast to increase to £50.7m by 2025, and to £108.3m at 2032. Account has been made for the turnover efficiency of existing comparison goods floorspace to increase (on the basis that operators are generally able to make their existing floorspace more productive over time)<sup>45</sup>.
- 7.28 Once again, this initial analysis does not take into account existing commitments, which we set out in Table 26d at **Appendix D** and which we estimate will have a combined benchmark turnover of £20.5m at 2014 prices, if it were to be assumed that it was all to be operational at 2015.
- 7.29 After taking account of commitments, a deficit expenditure of £-2.9m is identified at 2020, shifting to a residual expenditure of £25.6m at 2025 and £80.6m at 2032. We then convert this to a potential floorspace capacity by adopting suitable average sales densities. The minimum figure is based on the identified need being met through the delivery of high street floorspace and the maximum figure relates to need being met by bulky goods retailers or in smaller town centres (which both generally accommodate operators which achieve lesser sales densities). Adopting this

<sup>45</sup> Such increases have been derived from the projections set out in Table 4b of Experian Retail Planner Briefing Note 13

methodology, we conclude that there is potential capacity for new comparison goods floorspace in the District of between 11,880 sq.m net and 19,800 sq.m net by 2032. Our results are summarised in Table 7.6 below.

**Table 7.6: Quantitative Need for Comparison Goods Floorspace in Tendring District**

Year	Comparison Goods				
	£m			Floorspace Requirement (sq m net)	
	Surplus (£m)	Commitments (£m)	Residual (£m)	Min <sup>1*</sup>	Max <sup>2*</sup>
2015	0.0	20.5	-20.5	-4,090	-6,820
2020	19.9	22.8	-2.9	-510	-850
2025	50.7	25.1	25.6	4,170	6,940
2032	108.3	27.7	80.6	11,880	19,800

1. Average sales density assumed to be £5,000 per sq m which WYG considers to be towards the higher end of what could be achieved in Tendring District

2. Average sales density assumed to be £3,000 per sq m which WYG considers to be towards the lower end of what could be achieved in Tendring District

3. 2014 prices

4. rounded to the nearest 10 sq.m

7.30 Building on the above position, Table 7.7 considers the comparison goods capacity in each of the identified town centres in the District. Table 7.7 shows that the existing comparison good commitments in Clacton would create an expenditure deficit in the short term however the medium to longer term floorspace requirement is substantially higher than other defined centres in Tendring, mainly driven by it benefiting from the largest market share of all the district's town centres and is the key focus of such facilities for the district. There are no major retail commitments in Harwich, Dovercourt, Manningtree and Brightlingsea while a floorspace capacity is identified which implies that there is scope for improving the facilities in those centres. For Walton, after the Aldi commitment at Martello site, there is no residual quantitative capacity for additional comparison floorspace over the plan period. The results show that Frinton-on-Sea and Dovercourt/Harwich have the most identified capacity over the plan period and behind Clacton should be the main focus for future comparison goods shopping, subject to suitable and available sites being found.

**Table 7.7: Residual Quantitative Capacity for Additional Comparison Goods Facilities in Defined Town Centres Floorspace Post Implementation of Commitments**

Year	Comparison Goods Expenditure			Floorspace Requirement (Net)	
	Surplus £m	Commitments <sup>1</sup> £m	Residual £m	Min <sup>2*</sup> sq.m	Max <sup>3*</sup> sq.m
<b>Clacton</b>					
2015	0.0	17.3	-17.3	-3,470	-5,780
2020	14.1	19.3	-5.2	-940	-1,560
2025	35.3	21.3	14.0	2,290	3,810
2032	75.1	23.5	51.6	7,600	12,670
<b>Frinton-on-Sea</b>					
2015	0.0	0.7	-0.7	-130	-220
2020	1.7	0.7	0.9	170	280
2025	4.2	0.8	3.4	550	920
2032	9.0	0.9	8.1	1,190	1,980
<b>Harwich and Dovercourt</b>					
2015	0.0	0.0	0.0	0	0
2020	3.4	0.0	3.4	600	1,010
2025	8.5	0.0	8.5	1,380	2,290
2032	18.0	0.0	18.0	2,650	4,420
<b>Brightlingsea</b>					
2015	0.0	0.0	0.0	0	0
2020	0.2	0.0	0.2	40	70
2025	0.5	0.0	0.5	90	150
2032	1.2	0.0	1.2	170	290
<b>Manningtree</b>					
2015	0.0	0.0	0.0	0	0
2020	0.4	0.0	0.4	70	110
2025	0.9	0.0	0.9	150	250
2032	2.0	0.0	2.0	290	490
<b>Walton</b>					
2015	0.0	2.5	-2.5	-490	-820
2020	0.2	2.7	-2.6	-460	-770
2025	0.4	3.0	-2.6	-420	-700
2032	0.9	3.3	-2.4	-350	-590

Source: Tables 26 at Appendix D

<sup>1</sup> Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 13 (October 2015)

<sup>2</sup> Average sales density assumed to be £5,000 per sq.m

<sup>3</sup> Average sales density assumed to be £3,000 per sq.m

Rounded to the nearest 10 sq.m

At 2014 prices



### Qualitative Assessment

- 7.31 Building on the analysis in Section 5, Table 7.8 sets out the level of total comparison expenditure leakage from the Tendring Study Area (Zones 1 to 4) to facilities outside the District. Half of the expenditure is spent at Colchester town centre, followed by Tollgate Retail Park in Colchester and Ipswich. The total amount of comparison expenditure leakage from Tendring Study Area (Zones 1 to 4) amounts to £196.6m at 2015. Comparing this figure to the total comparison expenditure generated within Tendring District (£399.1m), it implies 49.3% of available comparison expenditure is spent at facilities outside the District. This shows that there is a qualitative need to improving the existing facilities in the District to attract residents to shop locally. If no improvements are secured then this expenditure leakage could increase to £237.6m by 2020, this is comparable to the level of money that is currently retained within the district at 2015, demonstrating the scale and magnitude of the expenditure leakage currently occurring. However, WYG recognise that with improvements in the retail offer since 2005, Tendring has already improved its market share which has subsequently helped retain more comparison goods expenditure locally. However, given that Colchester is very well connected and accessible to most residents within the district then most of this expenditure leakage is realistic given the position of Colchester as a higher order centre in the sub regional hierarchy. There may be some scope for claw back of lost trade if an appropriate typology of new retail accommodation could be secured in Tendring's network of town centres, ideally focused on Clacton given its existing infrastructure and resident population. The key areas of deficiency were in clothing and footwear, furniture and toys, games and recreational goods which all had a notably low market share in the Tendring Study Area.

**Table 7.8: Total Comparison Expenditure Leakage From Tendring Study Area (Zones 1 to 4) to Facilities outside Tendring**

Destination	Expenditure Leakage from Tendring Study Area	
	(From Zones 1-4)	
	£M	%
Colchester Town Centre	100.0	50.9
B&Q Warehouse, Lightship Way, Colchester	6.2	3.1
Colchester Retail Park, Colchester	5.9	3.0
Colne View Retail Park, Colchester	1.7	0.9
Peartree Road Retail Park, Colchester	1.3	0.7
The Stanway Retail Park, Colchester	8.8	4.5
The Tollgate Centre, Colchester	4.4	2.3
Tollgate Retail Park, Colchester	13.8	7.0
Turner Rise Retail Park, Colchester	1.7	0.9
Tesco Extra, Highwoods, Colchester	0.9	0.5
Abroad	1.8	0.9
Asda, Whitehouse Industrial Estate, Goddard Road, Ipswich	2.8	1.4
Central London	1.6	0.8
Chelmsford	2.3	1.2
Euro Retail Park, Ipswich	2.4	1.2
Futura Retail Park, Ipswich	1.8	0.9
Ipswich	12.2	6.2
Lakeside Retail Park, West Thurrock	6.2	3.1
The Interchange Retail Park, Ipswich	7.1	3.6
Other facilities	13.7	7.0
<b>TOTAL OUTSIDE TENDRING STUDY AREA</b>	<b>196.6</b>	<b>100.0%</b>

Source: Table 25 of Appendix D

## Conclusion

- 7.32 Based on current shopping patterns, there is a demonstrable capacity for further convenience retail floorspace within Tendring. Based on forecast increases in expenditure and current 'overtrading' in some out of centre stores, and accounting for commitments, there is assessed to be a long term convenience goods expenditure capacity within Tendring of £12.8m by 2032.
- 7.33 Applying separate sales densities to the identified residual expenditure to reflect the differing trading characteristics of convenience operators highlights a capacity to accommodate between 980 sq.m net and 1,850 sq.m net by 2032. However, in the short to medium term there is limited

rationale to positive to plan for new convenience goods provision beyond current planning commitments.

- 7.34 Given the forecast increases in comparison goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace — assuming that the future performance of Tendring's facilities will match its current market share — the surplus expenditure capacity from the District of Tendring's survey derived turnover is identified as -2.9m by 2020. This is forecast to increase to £25.6m in 2025 and £80.6m in 2032.
- 7.35 Again, taking separate sales densities to account for difference in comparison operators, this identifies a capacity for between 4,170 sq.m and 6,940 sq.m net of additional comparison retail floorspace in 2025, increasing to between 11,880 sq.m net and 19,800 sq.m net at 2032.
- 7.36 A parallel exercise to estimate convenience and comparison good capacity for each town centre shows that there is a need for both convenience and comparison floorspace in Clacton and Dovercourt (and Harwich) up to 2032. A comparison floorspace need is identified in Frinton-on-Sea and Brightlingsea and Manningtree while there is no demonstrable additional floorspace need in Walton-on-the-Naze up to 2032.

## 8.0 Recommendations and Future Retail Strategy

### Summary of Findings

- 8.01 WYG were instructed to provide a clear picture of the existing convenience and comparison retail situation in Tendring and to advise on the need for new retail floorspace to meet the needs of a growing population as part of the evidence base informing the production of the emerging Local Plan (up to 2032).
- 8.02 Our analysis is supported by a household survey of 1,000 respondents (dated May 2015) that establishes the existing retail habits, market shares and inflow/outflows across the Sub Region Study Area, in order to calculate convenience and comparison retail expenditure floorspace capacity projections for the period to 2032. This is supplemented by a series of health checks of the existing designated town centres in order to assess their vitality and viability.
- 8.03 In summary, our study identifies that:
- Clacton town centre is a generally healthy centre, which performs a vital role for residents of the District and wider sub-region;
  - Dovercourt, Frinton-on-Sea, Walton-on-the-Naze, Brightlingsea and Manningtree appear to be in good health and performing well and should be allocated as town centre in Tendring's retail hierarchy;
  - Harwich appears to be under-performing with a higher vacancy rate, limited commercial provision, low level of pedestrian activity and the commercial units dispersed within the town centre and performs more of a district centre role than town centre due to its limited retail and commercial offer;
  - The Sub Region Study Area has a resident population of approximately 308,736 in 2015, rising to 322,795 by 2020, to 336,337 by 2025 and to 353,637 by 2032. This represents an increase in population within the Sub Region Study Area of 14.5% between 2015 and 2032;
  - The Tendring Study Area (Zones 1-4) has a resident population of approximately 144,671 in 2015, rising to 164,510 by 2032. This represents a population growth of 19,839 (or 13.7%) between 2015 and 2032;

- It is estimated that, at 2015, the resident population of the Sub Region Study Area generates some £633.7m of convenience goods expenditure. This is forecast to increase to £739.3m by 2032;
- In the Tendring Study Area, the resident population generates approximately £301.8m in 2015 and increase to £349.8m by 2032;
- It is assessed at the district level that after accounting existing facilities and convenience goods commitments, there is no immediate convenience floorspace need up to 2025. By 2032, there is a convenience goods expenditure capacity within Tendring of £12.8m. This identifies a capacity to accommodate between 980 sq.m net and 1,850 sq.m net of new convenience goods floorspace by 2032;
- Clacton has a surplus convenience expenditure capacity of £2.6m by 2020, to £11.1m by 2025 and to £21.3m by 2032. The identified expenditure could support between 200 sq.m net and 370sq.m net at 2020, increasing to 1,630 sq.m net and 3,080 sq.m net by 2032;
- The resident population within the Sub Region Study Area is identified as generating £879.5m of comparison goods expenditure at 2015. This is expected to increase to £1,698.0m by 2032;
- In the Tendring Study Area, the resident population generates approximately £399.1m in 2015 and increases to £765.5m by 2032;
- The surplus comparison expenditure capacity from the Tendring's survey derived turnover is identified as -£2.9m by 2020, which is forecast to increase to £25.6m in 2025 and £80.6m in 2032. This identifies a capacity for between 4,170 sq.m and 6,940 sq.m net of additional comparison retail floorspace in 2025, increasing to between 11,880 sq.m net and 19,800 sq.m net at 2032; and
- Clacton is identified for the highest level of surplus comparison expenditure capacity at £14.0m at 2025 and £51.6m at 2032. This identified expenditure could support between 2,290 sq.m net and 3,810sqm net at 2025, increasing to 7,600 sq.m net and 12,670 sq.m net at 2032.

## Retail Hierarchy

- 8.04 In this section, we review the draft policies contained in the draft 2012 Tendring Local Plan (as amended by pre submission focussed changes 2014) and comment whether the draft policies are in compliance with the national planning policy in the NPPF.
- 8.05 In drawing up Local Plans, Paragraph 23 of the NPPF requests the LPA to define a network and hierarchy of centres that is resilient to anticipated future economic changes.
- 8.06 Draft Policy PRO5 identifies Clacton as a 'major town centre' and Frinton-on-Sea, Harwich, Dovercourt, Brightlingsea, Manningtree and Walton-on-the-Naze are designated as 'town centres'. Underneath these are 'district centres', 'village centres' and 'existing and proposed neighbourhood centres'.
- 8.07 In the absence of any definition to rely on in the NPPF and the associated 'Ensuring the Vitality of Town Centres' National Planning Practice Guidance, the definition of different tiers of the retail hierarchy provided by the now superseded Planning Policy Statement 4: Planning for Sustainable Economic Growth (PPS4) remains of some relevance. In respect of the definition of town centres, district centres and local centres, PPS4 states the following:

*"Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability. In London the 'major' and many of the 'district' centres identified in the Mayor's Spatial Development Strategy typically perform the role of town centres.*

*District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.*

*Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a*

*newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.*

*Small parades of shops of purely neighbourhood significance are not regarded as centres for the purposes of this policy statement."*

- 8.08 Experian<sup>46</sup> defines the multi-functional offer of a city or town as including residential, public service, leisure and entertainment, commercial and cultural facilities (amongst others) and Appendix 2 of the NPPF defines 'main town centre uses' as:

*"Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, 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)."*

- 8.09 In accordance with the findings of this Study, and in light of these definitions, we recommend the Council to retain Clacton as a 'major town centre'. We consider Clacton town centre to be a generally healthy centre (although there are signs of some vulnerabilities), which performs a vital role for residents of the District. The town centre has an important role in the district and contains a good representation of retail, leisure, and civic uses that to cater the need of the district's residents.
- 8.10 Our health check shows that Harwich has a total of 3,810 sq.m retail and leisure floorspace and the centre is disjointed with a high level of non town centre uses on ground level. There are limited retail and leisure service facilities in the centre. We consider that Harwich does not function as a town centre but would be more appropriate to be classified as a district centre. Apart from Harwich, the following centres are proposed to be retained as 'town centres'.

- Dovercourt
- Walton-on-the-Naze
- Frinton-on-Sea
- Brightlingsea

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<sup>46</sup> 'Town centre Futures 2020', Experian, September 2012

- Manningtree

8.11 The retail hierarchy contained in draft Policy PRO5 includes 'village' and 'neighbourhood' centres which do not classify as defined town centres in NPPF terms. The remit of this Study has not included WYG to review the composition to verify these lower order centres.

### Review of Potential Sites

8.12 Paragraph 23 of the NPPF indicates that the LPA should allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre.

8.13 For **Clacton**, our health check identified 19 vacant units which amount to 3,580 sq.m. vacant floorspace. Our retail capacity exercise identified a convenience floorspace need of 850 sq.m net to 1,610 sq.m net at 2025 and 1,630 sq.m net to 3,080 sq.m net by 2032. The identified comparison floorspace need would be between 2,290sq.m net to 3,810 sq.m net at 2025 and 7,600 sq.m net to 12,670 sq.m net by 2032. Assuming a mid-point of these figures, this implies a total floorspace need of 4,280 sq.m net in 2025, increasing to 12,490sq.m net in 2032. The identified vacant floorspace could only accommodate approximately 84% and 29% of the required floorspace at 2025 and 2032 respectively. Therefore it is evident that the vacant floorspace would be insufficient to accommodate the required floorspace over the next 17 years. However, without a detailed audit of the current level of vacant units within the district's town centres, it is very difficult to conclude how much of this floorspace could be potentially suitable to accommodate future comparison goods capacity, as some of the these units may be more appropriate for service or other main town centre uses or are simply not of a standard appropriate for modern operator requirements.

8.14 The same exercise was carried out for other centres and the results are shown in Table 8.1 below. For **Frinton-on-Sea**, there is an identified floorspace need to accommodate 495 sq.m net at 2025, increasing to 1,455 sq.m net at 2032. However, only a total of 1,040 sq.m vacant floorspace is identified. This implies that additional sites would need to be required to accommodate the identified need in the long term.



**Table 8.1: Comparison of Floorspace Requirement and Existing Vacant Floorspace**

Centre	Convenience Floorspace (SQM net)		Comparison Floorspace (SQM net)		Total (SQM net)		Midpoint of Floorspace requirement	Vacant floorspace identified in May 2015	Total vacant unit
Clacton	min	max	Min	Max	Min	Max	(SQM net)	(SQM net)	
2015	-530	-1,000	-3,470	-5,780	-4,000	-6,780	-5,380	3,580	19
2020	200	370	-940	-1,560	-740	-1,190	-960		
2025	850	1,610	2,290	3,810	3,140	5,420	4,280		
2032	1,630	3,080	7,600	12,670	9,230	15,750	12,490		
<b>Frinton-on-Sea</b>									
2015	-300	-560	-130	-220	-430	-780	-605	1,040	7
2020	-230	-430	170	280	-60	-150	-105		
2025	-170	-310	550	920	390	610	495		
2032	-90	-170	1,190	1,980	1,100	1,810	1,455		
<b>Dovercourt and Harwich</b>									
2015	20	40	0	0	20	40	30	1,950	14
2020	270	510	600	1,010	870	1,520	1,195		
2025	500	940	1,380	2,290	1,880	3,230	2,555		
2032	770	1,450	2,650	4,420	3,420	5,870	4,645		
<b>Brightlingsea</b>									
2015	-850	-1,610	0	0	-850	-1,610	-1,230	1,070	9
2020	-840	-1,580	40	70	-7800	-1,510	-1,150		
2025	-820	-1,550	90	150	-730	-1,400	-1065		
2032	-800	-1,520	170	290	-630	-1,230	-930		
<b>Manningtree</b>									
2015	30	60	0	0	30	60	45	550	4
2020	90	170	70	110	160	280	220		
2025	150	280	150	250	300	530	415		
2032	210	400	290	490	500	890	695		
<b>Walton-on-the-Naze</b>									
2015	-980	-1,840	-490	-820	-1,470	-2,660	-2,065	1,370	16
2020	-950	-1,800	-460	-770	-1,410	-2,570	-1,990		
2025	-940	-1,780	-420	-700	-1,360	-2,480	-1,920		
2032	-930	-1,750	-350	-590	-1,280	-2,340	-1,810		

8.15 For **Harwich** and **Dovercourt**, comparing the identified floorspace requirement to the available vacant floorspace, there would be a shortfall of approximately 600 sq.m net to 2,700 sq.m net at 2025 and 2032. Therefore additional sites would be required to accommodate the identified floorspace requirement up to 2032.

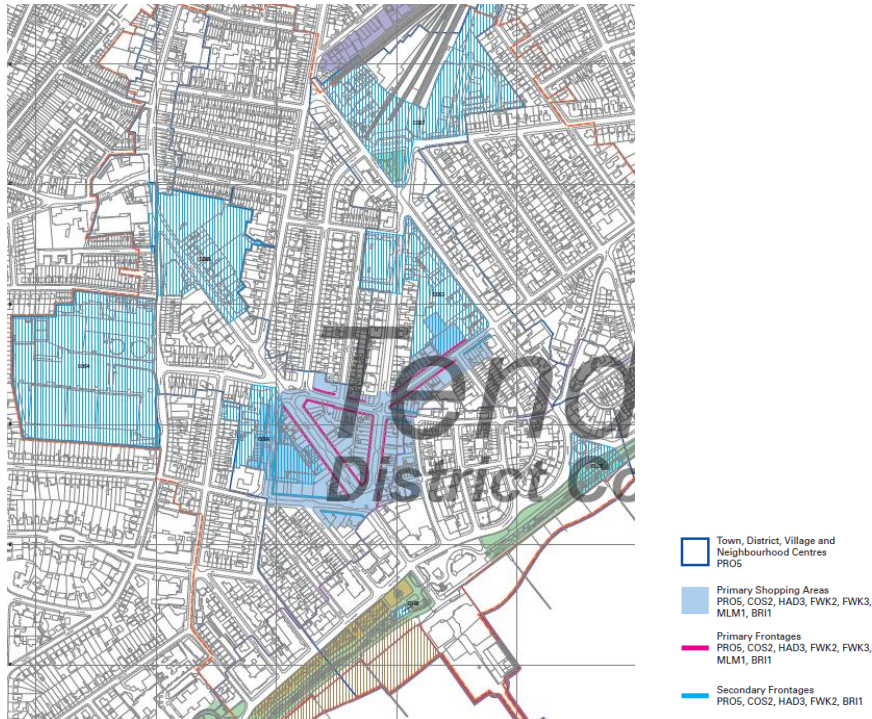
- 8.16 For **Manningtree**, the identified vacant floorspace can accommodate most of the requirement in short to medium terms. However, it may be more appropriate to deliver new purpose built facilities if the existing vacant stock is unable to meet operator's requirements. It is recommended the market performance is monitored to determine whether additional sites would be required in long term.
- 8.17 For **Brightlingsea** and **Walton**, there is an identified deficit in floorspace requirements. This implies that beyond the existing facilities, retail commitments and vacant floorspace, there is no demonstrable need to identify further sites for major retail developments in short to long term. Nevertheless, the retail market is constantly changing and we would recommend that the retail position should be regularly monitored to ensure that new improved accommodation is sourced to ensure future business models can be accommodated, otherwise this may damage the future performance and subsequent vitality and viability of these centres.

### Potential Sites for identified retail floorspace

- 8.18 As demonstrated above, there is a need to identify potential sites that could accommodate the retail floorspace requirement in Clacton, Frinton-on-Sea, Dovercourt and Harwich. We provide an examination of potential sites in each centre below.

#### **Clacton town centre**

- 8.19 In Clacton, the following sites are identified by the draft Local Plan for regeneration of Clacton town centre.



**Figure 8.2: Extract of Clacton town centre showing the potential sites**

## Clacton - Civic Quarter

8.20 The site identified under draft Policy CO3 comprises the land and premises in Station Road, Carnarvon Road and the High Street. The site is identified for a comprehensive or phased mixed-use development and the creation of a 'Civic Quarter' – a focus for the provision of public services. The draft policy directs that the following uses are acceptable:

- Retain the Grade II listed Town Hall and its use as a theatre (Sui Generis)
- B1 (a) Business
- A2 Financial and Professional Services
- A1 Retail
- C3 Residential
- Multi-storey car park

8.21 WYG consider that this site can accommodate small scale ground level retail uses to complement the adjacent retail frontages and can help realise some of the long term capacity identified in this Study and therefore the site should be positively promoted for retail uses (or main town centre uses) to remove the requirements to demonstrate that the impact and sequential tests need to be satisfied and that such uses are acceptable in principle.

### Clacton - Waterglade Retail Park

8.22 The site is identified under draft Policy COS4 and has been identified as an opportunity site for comprehensive or phased mixed-use development which could comprise the following uses:

- A1-Shops (including Retail Warehouses)
- A3-Restaurants and Cafes
- B1-Business
- C1-Hotels
- D2-Leisure

8.23 The site is owned by National Grid and there is a proposal to redevelop the former gas work site for major retail expansion of the retail park. We understand that an application is being prepared and will be submitted to the Council imminently. This site whilst located in the town centre boundary it is not currently designated within the Primary and Secondary Shopping Frontages of the town centre and therefore any planning application for retail uses would currently need to be subject to sequential assessment and impact assessment under the NPPF. This site represents a key site to accommodate large scale of retail units to enhance the retail offers in Clacton and the district as a whole and therefore WYG would advise that given the capacity that this Study has identified for Clacton over the plan period, then in order to plan positively under the paragraph 23 of the NPPF we would recommend that this site is allocated in the plan to encourage main town centre uses in this location. However, any development on this site should seek to improve important linkages to the remainder of the town centre and principal commercial streets.

### Clacton - Jackson Road Site

8.24 Jackson Road site (draft Policy COS6) lies on the Secondary Shopping Frontage of Clacton town centre. The site is identified for comprehensive or phased mixed-use development which could comprise the following uses:

- Multi-storey car park
- A1-Shops
- A2-Financial and Professional Services
- A3-Restaurants and Cafes
- B1(a)-Offices

8.25 The western side of the site has been developed for a hotel with ground floor retail uses. We consider that the site is suitable for a range of flexible retail uses including A1, A2 and A3 with

office/residential uses above and could contribute positive to the vitality and viability of the town centre if an appropriate form of development is secured. Similarly, WYG recommends that the site is identified in any future development plan to encourage the expansion of any retail or other main town centre uses that would help to improve the retail offer of the wider town centre.

### Clacton - Station Gateway

- 8.26 The railway station is a key gateway into the town centre. The site is identified under draft Policy COS7 for comprehensive mixed use development around this transport interchange. The site is physically disjointed from the main part of the town centre. WYG consider that this site is suitable for mixed retail facilities at ground level to provide small scale retail facilities for passengers and visitors to the town centre.

### Clacton - Atlanta Cafe

- 8.27 The site lies in a prominent position on the seafront, embedded into the cliff-side overlooking the Pier and the beach. The site is safeguarded for restaurant and cafe use (A3). We consider that it is appropriate to retain the current designation.

### Dovercourt town centre – Starlings Site

- 8.28 Within the Dovercourt Town Centre and adjoining areas, the Starlings site represents a major opportunity to accommodate new retail floorspace to reinvigorate the High Street and improve the town centre offer. The site is located at the eastern end of the centre adjacent to the Primary Shopping Frontage of Dovercourt, at land bound by Bay Road, High Street and Orwell Road. The site is allocated for potential mixed use development under draft Policy HAD2. Policy indicates that the Council will support proposals for new and improved tourism attractions and leisure facilities. We understand that a Development Brief will be prepared to secure high quality development of future use. The site is cleared and we understand that a foodstore proposal was discussed; however, no formal planning application has been submitted. The site could positively contribute to the convenience and comparison goods capacity identified for Dovercourt/Harwich and therefore should be actively pursued as an allocation over the course of the plan period.

### Frinton-on-Sea town centre

- 8.29 Frinton-on-Sea town centre is a linear form with retail and leisure services along both sides of Connaught Avenue. Our capacity analysis indicates that the vacant floorspace would be sufficient to accommodate the floorspace requirement up to 2025 and beyond that additional sites would be

required. The draft Local Plan did not identify any specific site for retail use, however, we recommend that the Council review the area immediately to the north of the Primary Shopping Frontage as it contains a vacant unit and a range of comparison and financial and business services that could seek to accommodate a modest natural expansion of the high street.

### Review of Primary and Secondary Frontages of Tendring's Town Centres

- 8.30 Paragraph 23 indicates the need for the LPA to define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations.
- 8.31 Draft Policy PRO5a states that within Clacton, only Use Class A1 Shops will be permitted within the defined Primary Shopping Frontage. The designated Primary Shopping Frontage is marked on our updated Goad Plan which indicates that these frontages are concentrated with Class A1 uses. However, there is no definition of Primary and Secondary Shopping Frontages in the draft Local Plan and we recommend the Council should include a definition that is consistent with the NPPF.
- 8.32 As requested by the NPPF, it is necessary for LPAs to identify the Primary Shopping Area of existing centres as this forms the basis in terms of the application of the sequential approach to retail development. In this respect, Annex 2 of the NPPF provides the following definitions for the primary shopping area (PSA) and primary and secondary frontages as follows:

*Primary shopping area is a 'defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).'*

*'Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.'*

- 8.33 For Clacton town centre, the Primary Shopping Frontage (PSF), Secondary Shopping Frontage (SSF) and Primary Shopping Area (PSA) are marked on the Proposals map. The proposed PSF is focused on Pier Avenue, southern part of Station Road and western part of Rosemary Road. The proposed SSF covers West Avenue, Jackson Road, eastern part of Rosemary Road (up to Colne Road) and High Street (up to Sainsbury's). WYG consider that the extent of the PSF, SSF and PSA

are broadly in line with the NPPF guidance and the current function in those specific areas which have a high concentration of retail and commercial uses.

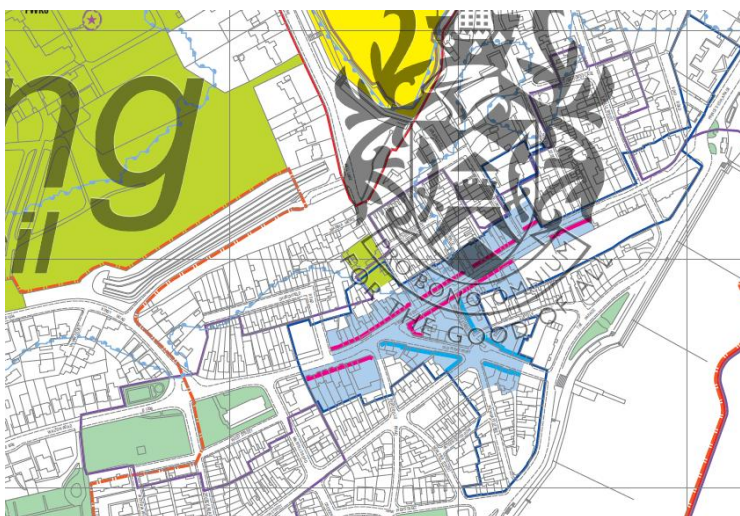
- 8.34 The Clacton town centre boundary covers the PSA and potential development sites identified in the draft Local Plan including the Civic Quarter (COS3), Waterglade Retail Park (COS4), Jackson Road (COS6), Clacton Station (COS7) and Atlanta Cafe (COS8) as indicated in Figure 8.2. WYG consider that although the existing Waterglade Retail Park contains substantial retail floorspace and there is a proposal to expand the retail park to the former gas work site, we consider that the site is physically separated from the PSA and is considered to represent an edge of centre location. We would recommend that to encourage the redevelopment of the in light of the identified capacity within this Study, the site should be allocated for main town centre uses. This would ensure that any further proposals for retail or other town centre uses would not be subject to sequential site assessment and retail impact assessment and would provide the rationale to confirm that this site is considered the preferred location for such commercial uses in the future and ensure that any future investment is focused towards this site.
- 8.35 In Dovercourt town centre, most of the High Street between Bay Road and Brooklyn Road are designated as PFS with the exception of the section between Midland House and Steele House which are designated as SSF (Figure 8.3). The SSF also includes 48-60 Kingsway and Kingsway Hall to 43 Kingsway. The PSA comprises the PSF and the SSF. WYG consider that the current designations are broadly in line with the NPPF guidance; however, subject to Council's aspiration of the Starlings site which is located immediately outside the PSA, it may be appropriate to include the site in the PSA to encourage its development. The town centre boundary extends the adjoining area to the west including a church, a hotel, an office and the Asda foodstore. We consider that these main town centre uses are appropriate to be included in the town centre boundary.





**Figure 8.3: Extract of Dovercourt Town Centre Proposals Map**

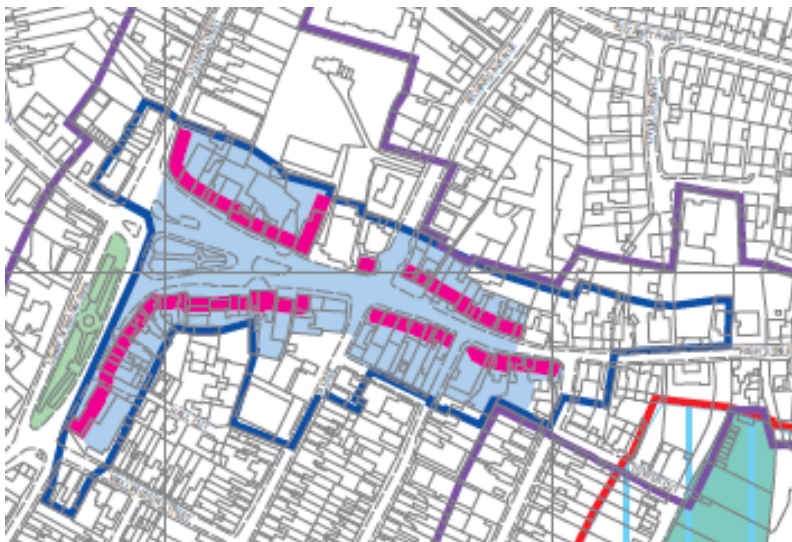
- 8.36 For Walton-on-the-Naze town centre, the proposals map defines the PSF, SSF, PSA and the town centre boundary (Figure 8.4). Our survey identifies that the convenience and comparison offers are concentrated on the High Street while the six relay streets behind the High Street have a higher proportion of leisure services. On this basis, we consider that the definitions of PSF, SSF and PSA are broadly in line with NPPF definition. The town centre boundary includes the Walton All Saints church which we consider is appropriate as a main attraction in the town centre although the use is not main town centre as prescribed in the NPPF (Annex 2).



**Figure 8.4: Extract of Walton-on-the-Naze Town Centre Proposals Map**

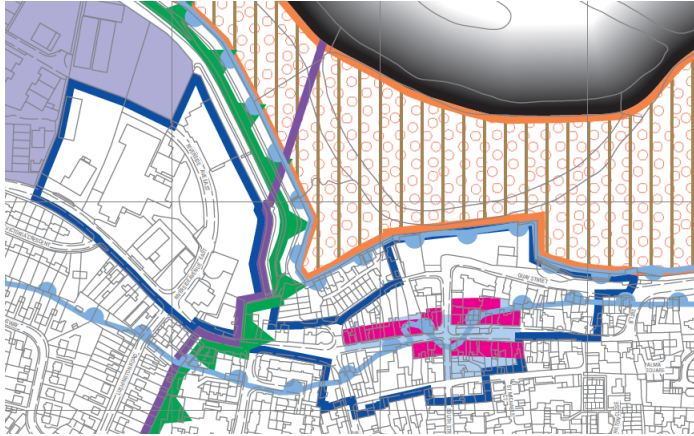


8.37 For Brightlingsea, the proposals map indicates the PSF, PSA and town centre boundaries but not a SSF in the town centre (Figure 8.5). However, we consider the PSA clearly includes the area which the retail and commercial uses are concentrated. In relation to the town centre boundary, the boundary extends to the east including the YMCA Hall which is an important community building within the town. We consider that the town centre boundary is broadly in line with the NPPF requirement. With no identified capacity for new convenience or comparison goods floorspace in Brightlingsea over the plan period, we do not consider there to be any reason to allocate any future expansions areas that could accommodate such capacity in the local plan.



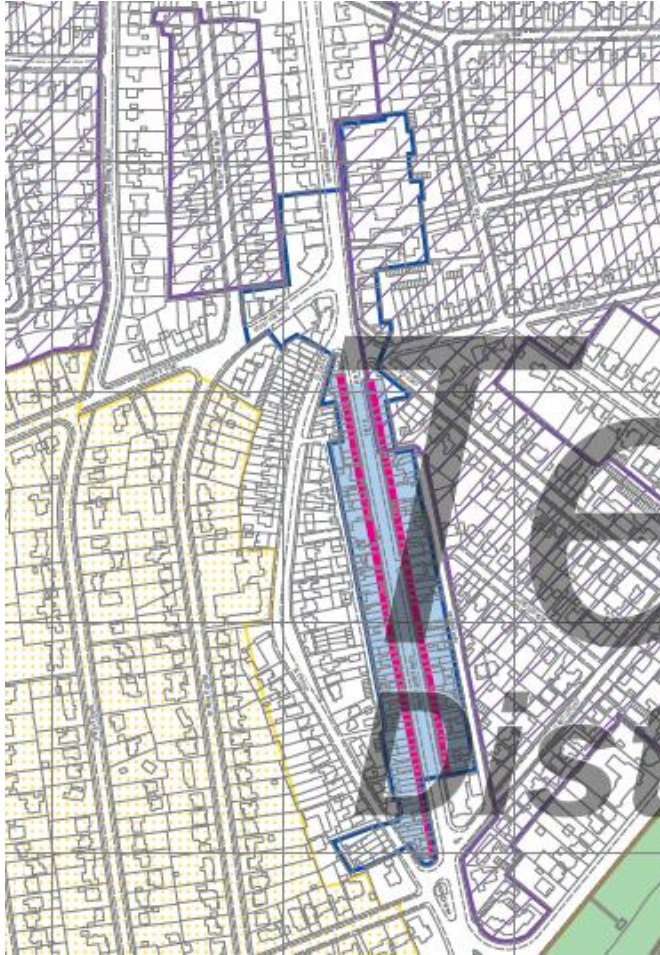
**Figure 8.5: Extract of Brightlingsea Town Centre Proposals Map**

8.38 Similar to Brightlingsea, the proposals map for Manningtree town centre only indicates the PSF, PSA and the town centre boundary (Figure 8.6). The extent of the PSF is identical to the PSA which reflects the retail and commercial area in the town centre. The town centre boundary includes the Co-op foodstore and the Railex site at Riverside Avenue East. We consider that although the Co-op is separated from the core of the town centre, it is an anchor convenience goods facility in Manningtree. The Railex site has development potential to deliver a major regeneration development in Manningtree and could contribute positively to the vitality and viability of the town centre if an appropriate form of development is secured. We understand that the site is now being redeveloped for employment commercial use (B1, B2 and B8) and recommend the town centre boundary to be realigned to exclude this site accordingly as it is not considered as main town centre uses as set out in Annex 2 of the NPPF.



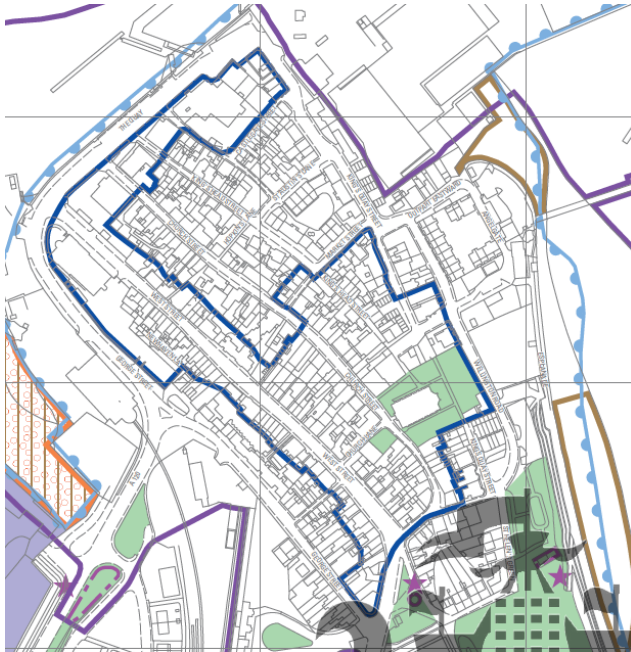
**Figure 8.6: Extract of Manningtree Town Centre Proposals Map**

- 8.39 For Frinton-on-Sea town centre, only the PSF, PSA and town centre boundary are defined on the proposals map (Figure 8.7). As discussed earlier, there is a need to identify further sites to accommodate the identified retail floorspace need in Frinton-on-Sea up to 2032. We recommend the Council to review the area immediate to the north of the PSA. The area includes a number of estate agents, a restaurant, a building society, an antique shop, a DIY shop, a greengrocer, a car sales and a furniture shop. While the proportion of A1 use is lower than the designated PSF, it is appropriate to designate the area as SSF and include it in the PSA. We consider that the town centre boundary is tightly drawn which is appropriate for this linear centre; however, this approach is unlikely to help support any identified capacity to be realised due to the physical restraint of the tight knit residential character areas surrounding the town centre boundary.



**Figure 8.7: Extract of Frinton-on-Sea Town Centre Proposals Map**

8.40 For Harwich, as the retail facilities are disjointed, neither frontages nor a PSA has been indicated on the draft proposals map (Figure 8.8). The town centre boundary includes the retail and commercial areas that we identified during site visit. It also includes the Mermaid House, Miranda House, Harbour House at the Quay which has been identified for retail and commercial development for 10 years. We consider that the town centre boundary reflects Council's vision for Harwich town centre and should be retained.



**Figure 8.8: Extract of Harwich Proposals Map**

- 8.41 WYG consider that a clarified PSA is needed for all defined centre as this provides an important tool to guard against the inappropriate number of non retail uses within the PSA, it also allows the impact of the PSA to be defined as part of any retail planning submissions that are submitted. The definition of the PSA also allows the consideration of either edge and out of centre developments to be quantified when they may be promoted by third parties.

### Local Impact Threshold

- 8.42 In accordance with national planning policy, it is appropriate to identify locally set thresholds for the scale of edge-of-centre and out of centre retail, office and leisure development which should be subject to the assessment of the impact criteria set out by paragraph 26 of the NPPF.

- 8.43 Paragraph 26 of the NPPF states that:

*'When assessing applications for retail, leisure and office development outside of town centre, which are not in accordance with an up-to-date Local Plan, local planning authorities should require an impact assessment if development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sq.m'*



- 8.44 The National Planning Practice Guidance (NPPG) (2014) provides further guidance on local thresholds. Paragraph 13 of 'Ensuring the vitality of town centres' states that:

*'The purpose of the test is to ensure that the impact over time (up to five years (ten for major schemes)) of certain out of centre and edge of centre proposals on existing town centres is not significantly adverse. The test relates to retail, office and leisure development (not all main town centre uses) which are not in accordance with an up to date Local Plan and outside of existing town centres. It is important that the impact is assessed in relation to all town centres that may be affected, which are not necessarily just those closest to the proposal and may be in neighbouring authority areas.'*

- 8.45 Paragraph 16 provides guidance in relation to floorspace thresholds and states:

*'The impact test only applies to proposals exceeding 2,500 square metres gross of floorspace unless a different locally appropriate threshold is set by the local planning authority. In setting a locally appropriate threshold it will be important to consider the:*

- *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*
- *Impact on any other planned investment'*

- 8.46 Paragraph 3.30 in the draft Local Plan defines "edge of centre" location as below:

- *'for retail development, a site within 300 metres of a 'primary shopping area' with good pedestrian connections to that primary shopping area;*
- *for office development, a site within 500 metres for a railway station;*
- *for other town centre uses, a site within 300 metres of a defined town, district, village or neighbourhood centre.'*

- 8.47 The edge of centre definition is broadly in line with the NPPF definition. However, NPPF definition of 'town centre' does not include small parades of shops of purely neighbourhood significance. As the remit of this Study has not allowed WYG to review the composition to verify these lower order

centres, we recommend the Council review whether the lower order centres are of purely neighbourhood significance.

- 8.48 Draft Policy PRO6 indicates that applications for retail, leisure and office development with an internal floor area of 2,500 or above would need to be accompanied by a retail impact statement. In addition, criteria a, of draft PRO6 states that development with an internal floor area less than 250 sq.m. will be permitted if it complies with other criteria in the policy. We would recommend the Council review the floorspace threshold as for example, a convenience store with a net sale area of 250 sq.m (which would be operated by Tesco Express or Sainsbury's Local) would clearly have a significantly greater impact on a small centre than it would on a large town centre.
- 8.49 Accordingly, policy should advocate a tiered approach whereby the threshold applied to planning applications at edge of centre and out of centre locations varies in relation to the role and function of a particular centre. In this regard, we note that recent appeal decisions have found that developments of a relatively modest scale can result in significant adverse impact on centres. For example, the 'Sainsbury's Stepney Green' decision (PINS reference APP/E5900/A/14/2217680) found that a convenience store of 261 sq.m would have an unacceptable impact on the most proximate defined centre. In considering the appeal, the Inspector found at paragraphs 16 and 17 of her decision that:

*'...it has not been fully shown that the development of a store of this size would not undermine the retail offer in the designated centre, including the small businesses which make up the majority of shops within the centre along the main road.*

*I therefore conclude that it has not been demonstrated that there would not be a detrimental effect on the vitality and viability of the SGNC [Stepney Green Neighbourhood Centre].'*

- 8.50 In our experience, it will only generally be development of a scale greater than these thresholds which could lead to a 'significant adverse' impact, could merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 27 of the NPPF. In setting the thresholds, we have had regard to the trading model of the smaller convenience goods store format operated by the likes of Co-operative Food, Morrisons, Sainsbury's and Tesco. Such stores generally have net sales areas slightly below the 280 sq.m net sales area limit for extended Sunday trading and generally have a gross floorspace approaching 400 sq.m. Whilst of a relatively

moderate size, these convenience stores often have a relatively substantial turnover and it is considered necessary for the local planning authority to retain control in respect of the consideration of impacts arising from the implementation of such proposals.

- 8.51 The thresholds should not only apply to new floorspace, but also to changes of use and variations of condition to remove or amend restrictions on how units operate in practice.
- 8.52 The proposed threshold at town and local centre level are considered to reflect the relatively small size of local centres and their consequent potential susceptibility to alternative out of centre provision. In our experience, a 200 sq.m (gross) operation located outside but in proximity to a defined local centre has the potential to impact on its performance. However, in practice, it is envisaged that a proposal of just greater than 200 sq.m adjacent to local centre would generally only require an Impact Assessment of limited length (i.e. for development of such a scale, impact may on occasion be able to be dealt with as part of the covering letter accompanying the application). Where an application proposal is above the respective stated impact threshold we would recommend that the application discusses and agrees the scope of any retail impact assessment which is appropriate to the scale and nature of the proposed development, and identifies any specific local issues that may need to be addressed.
- 8.53 We do not consider that a blanket threshold will usually be appropriate across all types of centres and instead consider it more appropriate to utilise a range of thresholds, relating to the type of centre and the proposed development is proximate to.
- 8.54 Clacton town centre contains a range of anchor stores which help to pull shoppers to the centre and 'spin-off' benefits to other retailers. The presence of anchor stores would maintain the vitality and viability of the centre. Some of the anchor stores have a medium retail format such as QD Store (1,030 sq.m), Sainsbury's (1,790 sq.m), Marks and Spencers (1,080sq.m) and 99P stores (1,430 sq.m) which are significantly under the 2,500 sq.m national threshold. Accordingly, we consider development proposals providing greater than 929 sq.m gross floorspace for retail, leisure or office uses in an edge or out of centre location proximate to Clacton and Frinton-on-Sea town centres should be the subject of an impact assessment as they could draw trade from the centre that may have a significant adverse impact and it would be appropriate to be able to assess such impact to ensure that the vitality and viability of Clacton is retained. The impact threshold also represents a standard large format development that could be promoted by developers.

8.55 Similar analysis has been carried out for other town centres and our recommended thresholds are listed in Table 8.9. Most of the centres have anchor stores over 250 sq.m and based on this finding, we recommend a threshold of 250 sq.m is applied. For Brightlingsea, the anchor convenience store (Spar) has a floorspace of less than 250 sq.m; however, as the store is already trading with the edge of centre Co-op, we consider that a threshold of 250 sq.m would still be sufficient. For Harwich, the only convenience store has a floorspace of 230 sq.m, we therefore consider that it is appropriate to set a lower threshold at 250 sq.m to ensure that the vitality and viability of this small centre would not be affected. Given that we have not explicitly reviewed the composition of the district, village and neighbourhood centres then we have not been able to provide advice on an appropriate threshold policy for these lower order centres which reflect their convenience or comparison goods function.

**Table 8.9: Threshold Analysis for Defined Town Centre**

Centre	Total floorspace	Anchor stores and sizes	Recommended thresholds
<b>Clacton</b>	52,790sq.m (24,130 sq.m)	QD Store (1,030 sq.m), Sainsbury's (1,790sq.m), Marks and Spencer's (1,080sq.m) 99 Stores (1,430 sq.m)	929sqm
<b>Frinton-on-Sea</b>	19,440 sq.m (11,080 sq.m)	Co-op convenience (500sq.m) Boots (270 sq.m) Peacocks (550 sq.m)	929 sq.m
<b>Dovercourt</b>	17,180 sq.m (6,650 sq.m)	Iceland (440 sq.m) Baldwins (360 sq.m) Boots (280 sq.m) Superdrug (290 sq.m) Co-op convenience (290 sq.m)	250 sq.m
<b>Walton-on-the-Naze</b>	11,240 sq.m (3,980 sq.m)	Co-op (430 sq.m) Premier (210 sq.m) Tesco Express (460sq.m)	250 sq.m
<b>Brightlingsea</b>	8,550 sq.m (3,330 sq.m)	Co-op (590 sq.m) Spar (230 sq.m) Boots (140 sq.m)	250 sq.m
<b>Manningtree</b>	12,220 sq.m (3,720 sq.m)	Tesco Express (250 sq.m) Co-op (1,720sq.m)	250 sq.m
<b>Harwich</b>	3,810 sq.m (1,670 sq.m)	Harwich convenience store (230 sq.m)	250 sq.m

Note: Total Floorspace is defined as all uses identified in the vitality and viability assessment, the figures in brackets relate to the gross retail floorspace, this comprises convenience and comparison goods only.



### Review of Local Plan Policies

- 8.56 WYG has considered the appropriateness of the proposed wording as set out in the draft Local Plan for Policy PRO5, PRO5a and PRO6 which are set out in Section 3 of the draft local plan, in order to establish whether the policy is fit for purpose and consistent with the NPPF. An explanation of the main suggested amendments is provided below.
- 8.57 Policy PRO5 sets out the Council's preferred retail network of centres with Clacton as a major town centre and then the other remaining centres identified at town centres below Clacton. From WYG's review of these centres and as identified in Section 5 and earlier in this section, we feel that all the town centres provide a town centre role as defined in the Annex 2 of the NPPF, with the exception of Harwich which we advised has a more district centre role given its service and convenience goods function and its limited scale, and therefore we consider that this should be re-allocated in the hierarchy accordingly.
- 8.58 The remit of this Study has not considered district, village or existing and proposed neighbourhood centres, and therefore we have not commented on the appropriateness of these centres. However, we should advise that Annex 2 of the NPPF excludes small parades of purely neighbourhood significant from representing town centres, but does include district and local centres. Therefore the Council may need to consider the definition of the neighbourhood centres to be compliant with the NPPF terminology.
- 8.59 In review of Policy PRO5a which seeks to control the use of shops in town centres and more specifically through the primary and secondary frontage policy.
- 8.60 Criteria b of Policy PRO5a states within other 'Town Centres' (i.e. Frinton-on-Sea, Dovercourt, Walton-on-the-Naze, Brightlingsea and Manningtree), A2 and A3 uses will not occupy any more than 30% of the total number of shop units along the Primary Shopping Frontage in the town centre. We understand that this draft policy is under review and the Council consider setting a threshold of no more than 30% of the total number of shop units along the Primary Shopping Frontage in non A1 use. In order to recommend a reasonable threshold, we review the composition and the proportion of A1 use within the Primary Shopping Frontage of six town centres in May 2015. Harwich town centre does not have a Primary Shopping Frontage and therefore similar review cannot be undertaken for the centre.

**Table 8.10: Proportion of A1 units on Primary Shopping Frontages in Tendring Town Centres**

	A1	Non A1 use	total	A1 %
<b>Clacton Town Centre</b>				
Pier Avenue - south	16	3	19	84.2%
Pier Avenue - north	10	5	15	66.7%
Rosemary South	4	6	10	40.0%
Rosemary north	2	6	8	25.0%
Station Road - west	8	6	14	57.1%
Station Road - East	9	6	17	52.9%
High Street - South	9	3	12	75.0%
High Street - north	9	5	14	64.3%
<b>Total</b>	<b>67</b>	<b>40</b>	<b>109</b>	<b>61.5%</b>
<b>Frinton-on-Sea Town Centre</b>				
Connaught Avenue - west	34	20	54	63.0%
Connaught Avenue - east	26	16	42	61.9%
<b>Total</b>	<b>60</b>	<b>36</b>	<b>96</b>	<b>62.5%</b>
<b>Dovercourt Town Centre</b>				
High Street - north	22	16	38	57.9%
High Street - south	10	17	27	37.0%
<b>Total</b>	<b>32</b>	<b>33</b>	<b>65</b>	<b>49.2%</b>
<b>Walton-on-the-Naze Town Centre</b>				
High Street - north	13	13	26	50.0%
High Street - south	14	8	22	63.6%
<b>Total</b>	<b>27</b>	<b>21</b>	<b>48</b>	<b>56.3%</b>
<b>Brightlingsea Town Centre</b>				
Victoria Street/High Street - north	7	8	15	46.7%
Victoria Street/High Street - south	17	11	28	60.7%
<b>Total</b>	<b>24</b>	<b>19</b>	<b>43</b>	<b>55.8%</b>
<b>Manningtree Town Centre</b>				
High Street - north	7	13	20	35.0%
High Street - south	6	6	12	50.0%
<b>Total</b>	<b>13</b>	<b>19</b>	<b>32</b>	<b>40.6%</b>

- 8.61 Our analysis indicates Tendring town centres have a Primary Shopping Frontage of between 40.6%-62.5% of A1 use which indicates that the PSF contains a fair representation of convenience and comparison offers. Based on the current provision, it is unrealistic to set a higher threshold of 'no more than 30% of non A1 use' within the PSF. We would recommend the Council to consider a threshold of 40% as it reflects the current performance of Tendring town centres. However, we advise that setting a maximum threshold of A1 uses along the PSF are often becoming less favoured as town centres seek to embrace a 'beyond retail' mandate and encourage other commercial uses, and whilst we see benefits in having such a mechanism to ensure that the retail functionality of town centres is not diminished further this needs to be balanced with embracing new land uses that may also help to increase the vitality and viability of a specific centre. However, WYG can confirm that the policy does not conflict with the NPPF as there is no specific commentary within the NPPF to consider that it conflicts with the guidance.
- 8.62 Draft Policy PRO6 seeks to build on the NPPF and introduces (paragraph 3.30) the application of the sequential test to sites that are located in edge of centre and out-of-centre locations, and usefully provides some commentary of these definitions, which accord with the guidance in both the NPPF and the NPPG.
- 8.63 Further in paragraph 3.32 it introduces the impact tests that are set out in paragraph 26 of the NPPF, and WYG can confirm that the commentary accords with the NPPF.
- 8.64 However in the main text assigned to Policy PRO6 the policy introduces a series of additional criteria through PRO6 a to PRO6 f, which require any proposals for retail, leisure or office development outside of the defined centres in PRO5 will only be permitted in a number of circumstances and these are explored below.
- 8.65 Criteria a introduces that any development that has a internal floor area of less than 250 sq.m will only be permitted, WYG consider that the 250 sq.m is consistent with the lowest level of threshold impact test at 250 sq.m (gross) for some of the smallest centres that we have reviewed, it may be appropriate to remove this and alternatively introduce the local impact thresholds instead as part of a policy review.
- 8.66 Criteria b states that if the site is specifically allocated for that use in the local plan then it can be permitted. This criteria could be consolidated if amendments are made elsewhere in PRO6, this may need to be undertaken in any event to better reflect the NPPF, for example, paragraph 26

states 'When assessing applications for retail, leisure and office development outside of town centre, which are not in accordance with an up-to-date Local Plan, (or emphasis), this would also allow criteria c to be removed which refers to mixed uses and help for the policy to be consolidated. WYG are of the view that if retail is prescribed as part of a retail allocation or through a mixed use allocation then there is no requirement for the relevant retail tests as prescribed in paragraph 24 and 26 to be satisfied as they have already been allocated for such uses.

- 8.67 In relation to criteria d, which seeks to permit proposed ancillary retail, leisure or office uses in to an established or proposed business that is predominantly within the use classes of B1, B2 and B8. WYG can confirm that there is no specific guidance on this in the NPPF but we do not believe that this is not in accordance with the NPPF and therefore this approach seems to be acceptable in recognition that some small ancillary retail uses do occur in such matters and need to be addressed. However, the current policy does not provide any mechanism to control the scale of such ancillary uses and this may need to be reconsidered.
- 8.68 In terms of criteria e, f (i), (ii) and (iii) it first introduces that applicants have been flexible in demonstrating that there are practical and operational reasons why the proposed development cannot be accommodated in a town centre and the proposed location is only viable in that location. It also secondly introduces through criteria f that development will be permitted where no suitable or available sites or premises within the defined centre can accommodate the proposed development. WYG would advise that these three criteria are seeking to introduce aspects to the application and guidance surrounding the sequential approach and we would therefore remove these as criteria in this position in the policy. We would recommend that the Council seek to simplify the sequential approach so it not as intrinsically linked to the criteria linked to impact. The current wording is somewhat at odds with the NPPF and requires a re-drafting and consolidation. PRO6 also introduces the impact threshold once criteria f has been satisfied, again we would suggest that this is reconsidered with our recommendations on the thresholds we have suggested for the different town centres.
- 8.69 In light of the above review we have raised a number of concerns with the current drafting of the retail policies but have confirmed that the application of town centre, primary shopping areas, primary and secondary frontage are broadly consistent with the guidance within the NPPF and the NPPG, however, WYG would recommend that there is a wholesale review of Policy PRO6 which

seeks to consolidate the draft policy into a more comprehensive and simpler policy that follows the requirements of paragraph 24 and 26 of the NPPF.

### Conclusion

- 8.70 WYG were instructed to provide a clear picture of the existing convenience and comparison retail situation in Tendring and to advise on the need for new retail floorspace to meet the needs of a growing population as part of the evidence base informing the production of the emerging Local Plan (up to 2032).
- 8.71 Our analysis is supported by a household survey of 1,000 respondents (dated May 2015) and is supplemented by a series of health checks of the existing designated town centres in order to assess their vitality and viability.
- 8.72 Clacton, Dovercourt, Frinton-on-Sea, Walton-on-the-Naze, Brightlingsea and Manningtree appear to be in good health and performing well and should be retained as town centre in Tendring's retail hierarchy. However, Harwich does not function as a town centre and we recommend it to be classified as a district centre but also acknowledge that its high quality built environment attracts significant levels of tourism to the centre.
- 8.73 Comparing the existing floorspace against the identified floorspace need in each town centre, we consider that there is a need to identify additional sites in Clacton, Frinton-on-Sea, Harwich and Dovercourt town centres to accommodate the identified floorspace requirement up to 2032.
- 8.74 Our review of primary and secondary frontages of Tendring's town centre indicates that in Clacton, the extent of PSF, SSF and PSA are broadly in line with the NPPF guidance and the current function in those specific areas which have a high concentration of retail and commercial uses. For Clacton and to take a positive approach to future town centre expansion, then WYG recommend that a number of sites be allocated for future main town centre uses to help encourage and deliver new retail (and leisure) floorspace. For Dovercourt, we recommend the Council to consider the Starlings site to be included in the PSA subject to the future aspiration of the site. For Manningtree, we recommend the town centre boundary to be realigned to exclude the Railex site. For Frinton-on-Sea, the town centre boundary is tightly drawn and we recommend the area immediate to the north of PSS to be designated as SSP. For Walton and Brightlingsea, we consider that the current designation is appropriate.



- 8.75 In accordance with national planning policy, it is appropriate to identify locally set thresholds for the scale of edge-of-centre and out of centre retail, office and leisure development which should be subject to the assessment of the impact criteria set out by paragraph 26 of the NPPF. We reviewed the size of anchor stores in each town centre and recommend a tiered approach for Impact Assessment.
- 8.76 A review on the draft Local Plan policies has been undertaken and recommendations have been given on draft policies PRO5, PRO5a and PRO6.

### Glossary of Terms

<b>Capacity</b>	Retail capacity in terms of this report refers to surplus/deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities.
<b>Comparison Goods</b>	Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods. A more detailed breakdown of comparison goods categories is provided below.
<b>Furniture Goods</b>	Includes all consumer expenditure on furniture, floor coverings and household textiles such as beds, sofas, tables, cupboards, bed linen, curtains, towels, lamps, mirrors, and so on.
<b>DIY Goods</b>	Includes all consumer expenditure on hardware, DIY, decorators' supplies and garden centre type goods. This category includes products such as hammers, saw, screwdrivers, wallpaper, plumbing items, floorboards, ceramic tiles, plants, pots, turf for lawns, and so on.
<b>Electrical Goods</b>	All consumer retail expenditure on domestic electrical and gas appliances, such as washing machines, dryers, dishwashers, ironing and press machines, cookers, freezers and fridge-freezers, coffee makers, radios, televisions, DVD players, and so on.
<b>Clothing &amp; Footwear</b>	All consumer retail expenditure on shoes and other footwear, garments for men, women, children and infants either ready-to-wear or made-to-measure, underwear, ties, handkerchiefs, scarves, and so on.



<b>Household Goods</b>	Includes household textiles and soft furnishings, china, glassware, jewellery and other miscellaneous goods such as greeting cards, notebooks, pens, pencils, and so on.
<b>Recreational Goods</b>	All consumer retail expenditure on bicycles and tricycles (excluding toy bicycles), musical instruments, sports equipment, camping equipment, toys of all kinds including dolls, soft toys, and so on.
<b>Chemist Goods</b>	All consumer retail expenditure on prescription and non-prescription drugs, adhesive and non-adhesive bandages, first-aid kits, hot-water bottles, toilet shops, sponges, and so on.
<b>Convenience Goods</b>	Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines.
<b>District Centre</b>	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.
<b>Expenditure Per Capita</b>	The average spend of each person within the defined Study Area on a variety of retail goods.



<b>Expenditure</b>	Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods.
<b>Expenditure Forecasts</b>	This assessment has been undertaken using the 'goods based' approach as prescribed in the Planning for Town Centres Practice Guidance. Retail expenditure forecasts have been derived from Experian Retail Planner Briefing Note 13 (October 2015).
<b>Experian (MMG3)</b>	The database used to identify population, expenditure and socio-economic breakdown of the Study Area population.
<b>Gross Floorspace</b>	Represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, and so on).
<b>GOAD Plans</b>	Provide accurate information on the composition of town centres, shopping areas, out-of-town retail parks and outlet villages in the UK. Identifies the fascia name, retail category, floorspace, and exact location of all retail outlets and vacant premises.
<b>GOAD Reports</b>	Provide a snap-shot of the retail status or demographic make-up of Goad surveyed town centres. Provides a comprehensive breakdown of floorspace and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial/Business Services and Vacancy sectors.



<b>Local Centre</b>	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.
<b>Net Floorspace</b>	Represents the level of internal area devoted to the sale of goods.
<b>Market Share</b>	Market shares derived from the household survey results, which are based on either the proportion of shopping trips or the proportion of expenditure attracted to a particular centre/facility.
<b>National Multiple</b>	This is a retail or service operator which is or part of a network of nine or more outlets.
<b>Price Base</b>	The price base for the Study is 2013; all prices are or have been adjusted to 2013 in order to be consistent.
<b>Rates of Productivity</b>	This takes into account the potential for existing retail floorspace to improve their turnover productivity (e.g. smaller goods could be sold from a smaller area for more money, increased opening hours, etc.).
<b>Sales Density</b>	Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure

identified. This is based on the typical turnover of a store by square metre/foot.

<b>Special Forms of Trading</b>	Defined by Experian as expenditure not directed to traditional floorspace such as the internet, mail order, party plan and vending machines and other non-store activity such as market and road-side stalls.
<b>Study Area</b>	This represents the household survey area, which is based on postal sectors.
<b>Trade Draw</b>	This refers to the level of trade attracted to a particular facility/centre.
<b>Turnover</b>	The turnover figure relates to the annual turnover generated by existing retail facilities.
<b>Town Centre</b>	A town centre will usually be the second level of centres after city centres and, in many cases, they will be the principal centre of centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.



## Appendices