EB 077

Chelmsford Retail Capacity Study 2015

Chelmsford City Council

September 2015

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For and on behalf of GVA Grimley Ltd

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Executive Summary

GVA have been instructed by Chelmsford City Council to undertake a Retail Study for the City Council Area which comprehensively reviews the need and capacity for new retail floorspace in Chelmsford and provides the Council with strategic advice on how to plan for retail needs of the City Council Area up to 2036. The terms of reference are to:

- Review and advise on the retail performance of Chelmsford City Centre, South Woodham Ferrers Town Centre and the defined Principal Neighbourhood Centres;
- Identify the capacity for new retail provision across the City Council Area up to 2036 in accordance with provision of the NPPF and in light of potential increases in population and forecast changes in retail expenditure; and
- Assess the potential to accommodate forecast capacity for retail development within the City Council Area, focusing specifically on the potential role of Chelmer Waterside.

In addition to on-site and desk based evidence gathering, this report is informed by new household telephone and in-centre visitor surveys undertaken in Chelmsford and South Woodham Ferrers Town Centre in 2014 and 2015. The report provides a sound and robust evidence base to inform the Council's next Local Plan.

Policy Framework

The National Planning Policy Framework (NPPF) was published in March 2012 and clearly advocates a 'town centres first' approach and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. The online National Planning Practice Guidance was published on 6th March 2014 and provides technical guidance on how to prepare a robust evidence base, which has informed this study.

The Core Strategy and Development Control Policies DPD (2008) and Focused Review (2013) seek to reinforce Chelmsford's sub-regional role by attracting new commercial investment and reinforcing the town's attractiveness by enhancing civic and cultural activities. The policy framework also seeks to enhance the viability and vitality of the South Woodham Ferrers Town Centre and the four Principal Neighbourhood Centres of The Vineyards, Great Baddow;

Gloucester Avenue, Moulsham Lodge; Newlands Spring, North Melbourne; and Village Centre, Chelmer Village.

Adopted Area Action Plans for Chelmsford Town Centre (CTCAAP) and North Chelmsford (NCAAP) set out the guiding principles for development, identify opportunity sites for development and promote retail expansion of Chelmsford City Centre. The Site Allocations DPD (2012) identifies the potential for further development of retail, commercial, community and residential uses in South Woodham Ferrers Town Centre and the Principal Neighbourhood Centres. The Council is currently in the process of preparing a Local Plan and this study will help to inform this process.

Retail Market Review and Town Centre Trends

Research suggests that economic growth will continue to improve following the recovery from the economic downturn although improvements are more likely in the comparison goods sector rather than the convenience goods sector. The traditional high street faces a number of challenges, not least from the impacts of the recession, including tightening of retail spending and changing consumer behaviour, but also from increasing competition posed by the internet, multichannel retailing and out of centre developments.

In this context, town centre strategies which support the continued evolution of the high street are considered ever more vital. This may involve providing a high quality shopping ‘experience’, maximising the benefits of tourist trade, and improving the mix of retail and non-retail outlets to increase length of stay and spend. It will be important for town centres to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the development plan period and to reaffirm their unique selling points which differentiate their retail offer from other centres. The on-going pattern of polarisation suggests that larger centres are well placed to maintain and enhance their offer. However, this is dependent on continued investment to ensure the right mix of retailers and other services.

Competing Centres

Within the sub-regional area, the household surveys demonstrate that Chelmsford retains a growing share of comparison goods expenditure within its core survey zones. The top sub-regional competitors remain Bluewater and Lakeside. Market shares attributed to these destinations grew between 2005 and 2013 and this trend is likely to continue following implementation of significant extensions planned at both shopping centres. Westfield Stratford City draws limited trade from Chelmsford's core zones and from the study area as a whole.

Cambridge continues to exert an influence over shopping patterns in the survey area, however retains a relatively minimal market share from within Chelmsford's core zones. Colchester's influence is falling both within the survey area and within Chelmsford's market share however planned retail and leisure development in the centre will seek to reverse this trend. Braintree's market share has fallen from within the survey area as a whole but increased slightly within Chelmsford's core zones. Basildon, and Harlow have limited influence on shopping patterns within Chelmsford's core zones, and whilst there are plans to regenerate parts of these town centres they are unlikely to be of a sufficient scale to substantially extend their influence over shopping patterns in the sub-region.

Collectively, the level of investment planned in the competing sub-regional centres will strengthen their role in the retail hierarchy, and increase their market share from the Chelmsford catchment area. It is therefore important that Chelmsford continues to evolve to improve its city centre offer in order to retain attractiveness and maintain market share.

Qualitative Assessment of Centres

Chelmsford remains a strong centre that performs well against the national average in key indicators. It achieves the highest level of retention of all the centres (and out-of-centre destinations) in the City Council Area for comparison goods, which demonstrates the popularity and strength of the city centre as a retail destination. The household survey results indicate that the centre attracts trade from across a wide area which extends beyond the City Council Area's boundaries, confirming that the city centre serves an important role in the wider regional hierarchy. The addition of John Lewis and wider Bond Street development should help ensure that the city centre maintains market shares and continues to attract trade and investment.

Our analysis shows that convenience provision in the centre is below average and is trading below expected levels. The Tesco on Springfield Road provides an important complementary role to the city centre and helps encourage linked trips to other shops and services. Market shares have decreased since 2005, and although household surveys tend to underestimate the performance of city centre stores, this may indicate a qualitative case to support new provision in the city centre to claw back expenditure from out-of-centre locations in Chelmsford. The committed Waitrose store will assist with this improvement and the Chelmer Waterside offers a further opportunity.

The centre will also soon benefit from substantial redevelopment as part of the Bond Street redevelopment. The Council should promote improvements around the shopping area to help enhance connectivity, engender a sense of place in the city centre and foster linked trips to other parts of the city centre, ensuring that the entirety of the centre can capitalise on the additional attraction and trade that will be generated by redevelopment of Bond Street.

In terms of leisure development, and the eating/drinking offer in particular, research identifies reasonably strong growth in consumer expenditure in these sectors over the plan period. Published research consistently encourages a mix of uses to meet the full shopper experience in order to compete with neighbouring centres and the internet. We consider leisure uses in the Use Class A3, A4 and D2 categories should be actively encouraged in the centre provided they are developed in appropriately sited city centre locations and, where possible, are designed alongside high quality public realm developments in order to create a quality leisure experience.

We recommend that the Council continue to focus on wider management strategies for Chelmsford City Centre, improving the existing retail areas and the environment, and encouraging a mix of city centre uses to create a 'social centre' which is not reliant on any one use or sector. This should include a diversity of city centre mix through daytime and evening eating/drinking, cinema, health type leisure facilities (yoga/pilates/gyms/personal training etc), snooker/pool halls, children's play/activity destinations, community facilities, libraries and crèche facilities, for example.

South Woodham Ferrers Town Centre Town Centre is dominated by an Asda foodstore which forms an important anchor to the centre. In addition to the Asda there is a high proportion of service uses in the centre and a lower than average proportion of comparison retailers in the centre and both the on-street and household surveys point towards a deficiency in comparison goods provision. It is also clear from survey information that the Asda store also benefits the remainder of the town centre through linked trips with other uses, which add to the vitality of the centre.

Based on our analysis, the Principal Neighbourhood Centres are currently performing relatively well and in accordance with their role and position in the retail hierarchy. The Principal Neighbourhood Centres have a more limited range and scale of facilities and services than Chelmsford City Centre and South Woodham Ferrers Town Centre, however they play an important role in meeting the day-to-day needs of the local catchment and promote sustainable urban living. Adjacent community uses play an important role in generating activity and linked trips with existing shops and facilities.

In particular, our study has found that they play an important convenience goods role. This should be maintained. Where suitable sites are identified, we consider that there may be an opportunity to accommodate additional convenience floorspace in some of the centres and accommodate some of the retail capacity identified over the plan period.

Retail Capacity

Taking into account all planning commitments and adopting a constant market share approach, we have found capacity to support up to 4,600sqm net large-format convenience floorspace by 2020 in the Chelmsford urban area, growing to 6,700sqm by 2025. Capacity grows significantly towards the latter end of the plan period, peaking at 11,500sqm net by 2036.

Whilst there is a varied trading performance in stores across Chelmsford, with some trading below average and some trading above, the identified capacity is primarily due to a collective trading above average performance, growing population and growing expenditure levels. In relation to the provision of new capacity, a priority for the Council should be to strengthen the convenience shopping role in Chelmsford City Centre and ensure that the Neighbourhood and Local Centres continue to perform a strong convenience goods role which serves local needs. It should also be noted that capacity levels in Chelmsford could fall should an increased level of provision be provided in other surrounding towns, such as South Woodham Ferrers, whose residents currently travel to Chelmsford for some of their convenience goods shopping.

We have not identified any short term additional capacity to support new comparison goods retail floorspace in the City Council Area. This is due to the significant new retail floorspace planned as part of the Bond Street redevelopment in Chelmsford City Centre which will soak up short to medium term capacity. Even when assessing the potential for this new planned floorspace to generate an increased market share for Chelmsford, our assessment has found that expenditure capacity to support new comparison goods floorspace will not occur until 2025 and beyond.

Although we have not identified any specific capacity in the City Council Area, this should not prevent an element of additional comparison goods floorspace coming forward in the City

Council Area's centres where it reflects their role in the retail hierarchy, is in a town centre location, meets local needs, and qualitatively improves the vitality and viability of these centres.

We do not consider that there is any need to plan for additional retail warehousing in the City Council Area over the plan period. However, there may be a qualitative case to support additional comparison retail warehousing which would complement rather than compete with existing floorspace in the city centre. This would be dependent upon demonstrating that such retail requirements could not first be accommodated in the city centre, in accordance with the NPPF. Applications for retail development that is outside of an existing centre and not in accordance with the development plan will need to be assessed on their own merits and against the sequential and impact tests.

Chelmer Waterside

We do not consider it necessary for the Council to plan for additional comparison goods floorspace in the Chelmsford City Centre. Subject to sensitive design, which promotes linkages to the city centre, we consider that Chelmer Waterside could provide an opportunity to meet a proportion of identified convenience floorspace capacity, and help claw-back trade which is currently being lost to out-of-centre stores in the City Council Area. Redevelopment of the site should be balanced with other priorities in the City Council Area, including residential.

Town Centre Frontage and Boundary Policies

The CTCAAP (2008) identifies a Primary Shopping Area (PSA), Primary Shopping Frontages (PSF) and Secondary Shopping Frontages (SSF) across Chelmsford City Centre. Following the implementation of the Bond Street redevelopment, we recommend that the entirety of the redevelopment is incorporated within the PSA and is identified as part of the PSF. We consider that there is no need to extend Secondary Shopping Frontages beyond what is already identified in the development plan. Likewise, we consider that there is no need to reduce the extent of these areas as we consider they accurately reflect the concentration of main town centre uses in the centre.

For South Woodham Ferrers Town Centre, there is a defined PSF which we consider to be sufficient bearing in mind the size of the centre and its overall offer. There is also a SSF in the centre, which we consider represents current provision in the centre. Together we consider that the PSF and SSF should comprise the PSA and form the extent of the ‘town centre’ for decision making purposes (e.g. when determining whether adjacent sites or edge or out of centre).

1. Introduction

1.1 In November 2013 GVA were instructed by Chelmsford City Council to undertake a Retail Study for the City Council Area which comprehensively reviews the need and capacity for new retail floorspace in Chelmsford and provides the Council with strategic advice on how to plan for retail needs of the City Council Area up to 2036. The primary purpose of this report is to provide a sound and robust evidence base to inform the Council's next Local Plan.

1.2 Our terms of reference are to:

- Review and advise on the retail performance of Chelmsford City Centre, South Woodham Ferrers Town Centre and defined Principal Neighbourhood Centres;
- Identify the capacity for new retail provision across the City Council Area up to 2036 in accordance with provision of the NPPF and in light of potential creases in population and forecast changes in retail expenditure; and
- Assess the potential to accommodate forecast capacity for retail development within the City Council Area, focusing specifically on the potential role of Chelmer Waterside.

1.3 In addition to on-site and desk based evidence gathering, this report is informed by new household telephone surveys across a wide geographic area (See Plan 1), in-centre visitor surveys undertaken in Chelmsford city centre and South Woodham Ferrers town centre, and town centre audits of the main centres undertaken by GVA in November 2013 and July 2014. The results are drawn together to provide a set of recommendations and advice to inform the on-going preparation of the new Local Plan.

Structure

1.4 This report is structured as follows:

- Section 2 sets out our review of national, strategic and local planning policies relevant to retail planning in the Chelmsford City Council Area.
- Section 3 provides an up to date overview of current national economic trends influencing town centres and retailing, including the role of the internet.

- Section 4 comprises a brief overview of competing centres within the wider sub-region and the extent to which this influences shopping patterns within the City Council Area.
- Sections 5, 6 and 7 present our qualitative assessment of Chelmsford city centre, South Woodham Ferrers town centre, and the Principal Neighbourhood Centres, highlighting key changes since the 2005 Retail Study.
- Section 8 sets out the global quantitative capacity forecasts for new retail provision within the City Council Area.
- Section 9 considers opportunities for growth and change, looking specifically at the potential future role of Chelmer Waterside site and comments on possible retail models for the site.
- Section 10 recommends a strategy for guiding the retail growth of Chelmsford's centres based upon evidence from previous sections.

2. Policy Framework

2.1 In this section we examine the key features of national and local planning policy guidance which provides the context and framework for this study.

National Policy

The National Planning Policy Framework (March 2012)

2.2 The National Planning Policy Framework (NPPF) was published on 27 March 2012 and sets out the Government's planning policies for England. It replaces the suite of national Planning Policy Statements, Planning Policy Guidance and some Circulars with a single, streamlined document.

2.3 At the heart of the NPPF is a 'presumption in favour of sustainable development', which should be seen as a golden thread running through both plan-making and decision-taking. The NPPF encourages Local Planning Authorities (LPAs) to positively seek opportunities to meet the development needs of their area.

2.4 The NPPF continues to recognise that the planning system is plan-led and therefore Local Plans, incorporating neighbourhood plans where relevant, are the starting point for the determination of any planning application. In line with the Government's aim to streamline the planning process, each LPA should produce a single Local Plan for its area with any additions DPDs or SPDs to be used only where clearly justified.

2.5 The NPPF maintains the general thrust of PPS4. It advocates a 'town centres first' approach, and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. In planning for town centres LPAs should:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- 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 shopping 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 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 economic development needed in town centres. Where town centre sites are not available, LPAs should adopt a sequential approach to allocate appropriate edge of centre sites;
- 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
- Where town centres are in decline, plan positively for their future to encourage economic activity.

2.6 The NPPF requires Local Plans to be aspirational but realistic. They should address the spatial implications of economic, social and environmental change and set out opportunities for development and clear policies indicating what will or will not be permitted and where.

2.7 LPAs should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. These assessments should be integrated and take full account of relevant market and economic signals. LPAs should use the evidence base to assess, inter alia;

- The needs for land or floorspace for economic development, taking account of both quantitative and qualitative requirements for all foreseeable types of economic activity over the plan period, including retail and commercial leisure development;
- The existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs;

- The role and function of town centres and the relationship between them, including any trends in the performance of centres; and
- The capacity of existing centres to accommodate new town centre development.

National Planning Policy Guidance (online)

2.8 On 6 March 2014 the Department for Communities and Local Government (DCLG) launched the online planning policy guidance, which cancelled a number of previous planning practice guidance documents, including the Practice Guidance on Need, Impact and the Sequential Approach (2009). Although it does not constitute a statement of Government policy, it provides technical guidance on how to prepare a robust evidence base and how to assess the impact of proposals for main town centre uses.

2.9 The web-based resource provides guidance on how to assess and plan to meet the needs of main town centre uses in full through production of a positive vision or strategy for town centres. This strategy should be based on evidence of the current state of town centres and opportunities to meet development needs and support their viability and vitality and should consider:

- The appropriate and realistic role, function and hierarchy of town centres in the area over the plan period. This will be informed by audits of existing centres to assess their role, vitality, viability and the potential to accommodate new development. It should cover a three five year period, but also take the lifetime of the Local Plan into account and be reviewed regularly;
- The most appropriate mix of uses in the centre to enhance overall vitality and viability;
- The potential to expand centres or enable new development or redevelopment of under-utilised spaces to accommodate the scale of need identified for main town centre uses. This should involve evaluating different policy options (for example, expanding the market share of a particular centre) or the implications of wider policy such as infrastructure delivery and demographic or economic change;
- Appropriate timeframes for provision of new retail floorspace;
- Complementary strategies that may be necessary or appropriate to enhance the town centre and help deliver the vision for its future; and

- How car parking provision can be enhanced and both parking charges and enforcement be made proportionate in order to encourage town centre vitality.

2.10 The NPPG sets out a range of indicators relevant when assessing the health of town centres over time. These include:

- Diversity of uses
- Proportion of vacant street level property
- Commercial yields on non-domestic property;
- Customer views and behaviour;
- Retailer representation and intentions to change representation;
- Commercial Rents
- Pedestrian flows;
- Accessibility;
- Perceptions of safety and occurrence of crime; and
- State of town centre environmental quality.

2.11 When planning for town centres, LPAs should take full account of relevant market signals and keep retail land allocations under regular review. Where it is not possible or appropriate to accommodate identified capacity in town centre locations, LPAs should plan positively to identify the most appropriate alternative strategy for meeting the need for these main town centre uses, having regard to the sequential and impact tests.

2.12 When applying the sequential approach in plan-making, LPAs should take into account the need for main town centre uses, the supply and demand for land, and whether there are sites which are suitable, available and viable having regard to the nature of the need that is to be addressed. If the additional main town centre uses cannot be accommodated in town centre sites, the next sequentially preferable sites should be considered. Local Plans should contain policies to apply the sequential test to proposals for main town centre uses that may come forward outside identified sites or locations allocated in the Local Plan.

Relevant Government Research

The Portas Review (December 2011)

2.13 In May 2011, Mary Portas was appointed to lead an independent review into the future of the high street, largely in response to the far-reaching effects of the recession on the retail industry and local high streets in particular. The report, published in December 2011, suggests measures to tackle the further decline of the high street.

2.14 Amongst the 28 separate recommendations set out in the report, there is a call to strengthen policy in favour of 'town centres first'. This followed the publication of the draft NPPF. In summary the recommendations aim to:

- Run town centres like businesses: by strengthening the management of high streets through 'Town Teams', developing the BID model and encouraging new markets;
- Get the basics right: by looking at how the business rate system could better support small businesses and independent retailers, encouraging affordable town centre car parking and looking at further opportunities to remove red tape on the high street;
- Level the playing field: by ensuring a strong town centre first approach in planning, introduce Secretary of State 'exceptional sign off' for out-of-town development and encouraging large retailers to show their support for high streets by mentoring local businesses;
- Define landlords' roles/responsibilities: by looking at disincentives for landlords leaving properties vacant, and empowering local authorities where landlords are negligent and making proactive use of Compulsory Purchase Order powers; and
- Give communities greater say: by including the high street in neighbourhood planning and encouraging innovative community uses of empty high street spaces.

Government Response to Portas Review (March 2012)

2.15 The Government published its formal response to the Portas Review in March 2012, which accepted virtually all of Portas' recommendations. It announced that they will run 24 'Portas Pilot' towns to set up Town Teams to create plans for the future of their high streets. In addition the Government will provide investment to help Business Improvement Districts (BIDs) access loans for their set-up costs and funding for a Future High Street X-Fund to reward towns which are delivering innovative plans to bring their town centres back to life. In its response, the Government also supports a National Market Day in June and plans to double small business rate relief. It also supports community involvement in the redesigning of high streets to reinvigorate areas of decline, increase footfall and encourage people to live in their town centres.

2.16 The Government did not support the call to introduce the suggested Secretary of State 'exceptional sign off' for all new out-of-town developments or require all large new developments to have an 'affordable shops' quota. The Government states that LPAs are best placed to understand local needs and 'exceptional sign off' is contrary to the Government's ethos of devolution. As such, the Government will continue to use the call-in power sparingly.

Understanding High Street Performance (December 2011)

2.17 The department for Business, Innovation and Skills (BIS) has also published a report which explores the many factors impacting on the economic and social performance of town centres and high streets. This study is intended to help inform government and local authority decision-making regarding town centres and high streets.

2.18 The study, based on a review of available research and literature on high streets, identifies key issues that the public, private and third sectors need to take into consideration when taking action or investing in high streets. The study identifies a range of factors which have stimulated and affected change on the high street:

- Externalities – despite planning policies to protect town centres, high levels of retail and landlord debt and public spending cuts have squeezed consumer spending;
- Spatial and Physical Factors – large format stores, accessible by car and where shopping is done under one roof, dominate the market to the detriment of traditional high streets;
- Market Forces – the growth in market share of out-of-centre shopping centres, major supermarkets and retail parks in comparison to town centres, demonstrates that consumers are voting with their feet;
- Management – high streets are difficult to manage and as a result are disadvantaged compared with supermarkets and shopping centres.

2.19 The study also examines the responses to high street change which have been implemented to date. These include: town centre masterplanning and public realm improvements; differentiation and emphasising a distinctive retail offer; policy prioritisation and more developed place management (e.g. TCM and BIDs).

2.20 Moving forwards, the study anticipates that retail performance on the high street will become increasingly challenging. Town centres will continue to be effected by the growth in out-of-centre retail, supermarkets non-food sales, and the internet. The high street of the future will need to differentiate itself from shopping centres, as a social space with a range of functions.

2.21 The report concludes that the traditional high street faces a number of challenges, not least from the tightening of retail spend and changing consumer behaviour but also from increasing competition posed by the internet and out-of-centre developments. Whilst the future is uncertain, strategies which support the high street are considered more vital.

Local Policy

Core Strategy and Development Control Policies DPD (2008)

2.22 The Core Strategy and Development Control Policies DPD was adopted in 2008 and sets out the long-term vision and objectives for Chelmsford including broad policies for steering and shaping development. It includes a number of Strategic Objectives which set out how the Council will seek to manage growth in the area. **Strategic Policy ECP1** seeks to maintain the City Council Area's economic competitiveness in a region of major growth and change by responding positively to economic change. **Strategic Policy ECP2** seeks to reinforce Chelmsford city centre's leading sub-regional role by attracting new commercial investment and reinforcing the city's attractiveness and competitiveness by enhancing civic and cultural activity. **Strategic Policy ECP4** seeks to enhance the viability and vitality of South Woodham Ferrers Town Centre and other secondary local centres. Although they are at the bottom of the centre hierarchy, the Core Strategy and Development Control Policies DPD recognises the important role that the Principal Neighbourhood Centres and other Local Parades play in meeting local needs.

2.23 These strategic objectives inform the spatial strategy for the City Council Area, which seeks to focus development on existing built-up areas, including an urban renaissance within Chelmsford City Centre which will be promoted as the 'Capital of Essex'. It also supports the development of two new neighbourhoods to the North of Chelmsford.

2.24 The Core Strategy sets policies to deliver these strategic objectives and the spatial strategy. **Policy CP22** sets out a number of measures to maintain high and stable levels of economic and employment growth, including directing major new retail, office and leisure investment to Chelmsford City Centre.

2.25 **Policy CP23** proposes to promote the continued strengthening of Chelmsford's regional role for shopping, major employment, civic and administrative functions, arts, culture and leisure facilities and as a centre for excellence in education and health care within Central Essex. The Council will direct new major development, including retail to Chelmsford City Centre to reinforce its role as the 'Capital of Essex'. As well as promoting retail development within the existing primary shopping area, the Council will extend the primary shopping area to accommodate the identified need for retail growth of up to 100,000 sqm.

2.26 **Policy CP25** seeks to enhance the viability and vitality of Principal Neighbourhood Centres in the City Council Area by protecting and enhancing the mix of uses and encouraging environmental improvements. It also sets out the hierarchy of centres within the City Council Area. The Principal Town Centre in the City Council Area is Chelmsford, followed by South Woodham Ferrers Town Centre Town Centre and the four Principal Neighbourhood Centres of The Vineyards, Great Baddow; Gloucester Avenue, Moulsham Lodge; Newlands Spring, North Melbourne; and Village Centre Chelmer Village. Below the Principal Neighbourhood Centres are a number of Local Principal Neighbourhood Centres which are defined by the Proposals Map accompanying the Site Allocations DPD.

2.27 **Policy DC5** states that all major development proposals within the centres should provide a mix of uses within use class A1-A5 with active frontages. **Policy DC63** resists the change of use of existing ground floor units within Class A1 use within Principal and Local Neighbourhood Centre Frontages unless the proposal would reinforce the function of the Neighbourhood Centre in serving day to day needs of the locality.

2.28 **Policy DC64** states planning permission will be refused for development that leads to a net loss of public car parking and privately owned public car parking in South Woodham Ferrers Town Centre Town Centre.

Core Strategy and Development Control Policies Focused Review DPD (2013)

2.29 Following the publication of the National Planning Policy Framework (NPPF) on 27 March 2012, Chelmsford City Council undertook a review of the Core Strategy and Development Control Policies DPD (2008). The Core Strategy and Development Control Policies Focused Review was adopted in 2013 and amends a number of policies that were not consistent with the advice contained within the NPPF. It should be read alongside the adopted Core Strategy (2008).

2.30 **Policies DC59** and **DC60** were amended to allow for changes of use to a wider range of uses where they support the existing shopping function of primary and secondary frontages but do not necessarily fall within Class A1 of the Use Classes Order 1987 (as amended). Policy DC59 states that In the Primary Frontages of Chelmsford and South Woodham Ferrers Town Centre Town Centres, ground floor changes of use from Class A1 units to other Class A or 'sui generis' uses of a retail nature will only be permitted where a number of criteria being met and where the balance of retail vitality and viability is not likely to be significantly harmed. In Secondary Frontages, Policy DC60 states that change of use of ground floor Class A1 uses to other Class A, B1(a) and D1 uses, or 'sui generis' uses of a retail nature will only be permitted where a number of criteria being met and where the balance of retail vitality and viability is not likely to be significantly harmed.

Chelmsford Town Centre AAP (2008)

2.31 The Chelmsford Town Centre Area Action Plan (CTCAAP) was adopted in 2008. It sets out a land use and urban design framework to direct development and public realm investment up to 2021. It allocates land for developments, makes proposals for infrastructure and public realm improvement and sets out steps to be taken to ensure delivery. It covers a roughly 0.5 miles (radius) area including the Chelmsford shopping area, the West End and Moulsham neighbourhoods, Central Park, Anglia Ruskin University Campus and Chelmer Waterside.

2.32 The CTCAAP (2008) identifies a Primary Shopping Area (PSA), Primary Shopping Frontages (PSF) and Secondary Shopping Frontages (SSF) across Chelmsford City Centre. The PSA extends along the High Street connecting the High Chelmer and Meadows shopping centres. Appendix 1 of the CTCAAP sets out a list of the areas included within the PSF and SSF.

2.33 The CTCAAP identifies 37 opportunity sites across eight character areas in the city centre. The following sites are identified for retail:

- High Chelmer Shopping Centre (Site 1): for shopping centre renewal and expansion with larger units; anchor store for new or relocated major retailer; refurbished or relocated Chelmsford Market; increased permeability and linkages; enhanced or replaced car parking.
- Land East of High Street (Site 3): extension of existing primary shopping area; create a link from the High Street to the river; improve or convert the Debenhams store.
- Tesco and adjoining land (Site 4): scope for expansion and alterations to existing foodstore; improve car parking and riverside frontage;
- Meadows Shopping Centre and car park, former gas works and adjoining land (Site 5): extend primary shopping area eastwards to accommodate identified need; new anchor store as a key destination; optimise use of riversides and establish strong pedestrian linkages.
- Former Jewsons, Tesco Home Store and Moulsham Mill (Site 25): retention of Tesco Home store and introduction of foodstore of maximum 3,300 sqm (net) with car parking;
- Riverside Retail Park (Site 30): frontage development to maximise development potential on the car parking area at the front of existing retail units

North Chelmsford AAP (2011)

2.34 The North Chelmsford Area Action Plan (NCAAP) was adopted in 2011 and seeks to implement new development planned in North Chelmsford up to 2021 in accordance with the Core Strategy and Development Control Policies DPD. It allocates sites and establishes master planning principles to expand existing neighbourhoods to the North West of Chelmsford by up to 800 homes and create at least 3,200 homes in new communities planned in the North East of Chelmsford.

2.35 In North West Chelmsford, land north of Hospital Approach and south of Woodhouse lane (**Site Allocation 1**) is identified for between 150-200 new homes and a new local neighbourhood centre providing convenience retail and healthcare uses.

2.36 Within the area planned for housing in North East Chelmsford, **Site Allocation 14** is allocated for a new local centre focused on White Hart Lane, which will reflect commercial realism while avoiding retail dominance over the whole area. The main retail unit will be used for food retail only and will be no larger than 500 sqm (gross). Smaller units will not exceed 180 sqm (gross) and will be used for retail, services and D1 uses. Supporting uses will comprise community services, small office premises, car parking and residential use on upper floors.

2.37 On 7th March 2014, Chelmsford City Council granted outline planning permission (09/01314/EIA) for a mixed use development comprising 3,600 dwellings and a mix of uses including employment, retail, hotel, leisure, open space, education and community facilities, landscaping and highways works. The planning permission is subject to a Section 106 Legal Agreement. The application spans a number of Site Allocations identified by the NCAAP, including Site Allocation 14. Four planning applications were submitted in November and December 2013 for the first phase of highway works and related infrastructure and the first two areas of housing (184 and 49 dwellings); these are yet to be determined.

Site Allocations DPD (2012)

2.38 The Site Allocations DPD was adopted in 2012. Its purpose is to allocate land for a range of uses to support the spatial vision and objectives of the Core Strategy. It covers the whole of the City Council Area with the exception of Chelmsford City Centre and North Chelmsford which are covered by separate Area Actions Plans (CTCAAP and NCAAP respectively). The Site Allocations DPD therefore covers the majority of the Chelmsford urban area, South Woodham Ferrers Town Centre and other villages.

2.39 **Topic 13** covers the Principal Neighbourhood Centres, which comprise South Woodham Ferrers Town Centre Town Centre and the Principal and Local Principal Neighbourhood Centres designated under Core Strategy Policy CP25. South Woodham Ferrers Town Centre and the Principal Neighbourhood Centres are identified as having potential for further development of retail, commercial, community and residential uses in South Woodham Ferrers Town Centre and the Principal Neighbourhood Centres.

2.40 The Proposals Map which accompanies the Site Allocations DPD identifies the boundaries and retail frontages for South Woodham Ferrers Town Centre and each of the Principal

Neighbourhood Centres. In South Woodham Ferrers Town Centre, the Primary Shopping Frontage consists of the Asda store and the area immediately to its north, with the SSF extending farther to the west. The boundary of South Woodham Ferrers Town Centre Town centre and the Principal Neighbourhood Centres incorporate retail frontages as well as other supporting uses. The boundaries of Local Principal Neighbourhood Centres are defined solely by the extent of their retail frontages.

Summary

- The National Planning Policy Framework (NPPF) was published in March 2012 and replaces the suite of national planning policy statements, including PPS4. The NPPF clearly advocates a 'town centres first' approach and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. The online National Planning Practice Guidance was published on 6th March 2014 and provides technical guidance on how to prepare a robust evidence base, including a list of indicators relevant when assessing the health and vitality of town centres over time.
- The Core Strategy and Development Control Policies DPD (2008) and Focused Review (2013) set out the adopted policy for retail uses. Policy seeks to reinforce Chelmsford's sub-regional role by attracting new commercial investment and reinforcing the city centre's attractiveness by enhancing civic and cultural activities. The plan also seeks to enhance the viability and vitality of South Woodham Ferrers Town Centre and the four Principal Neighbourhood Centres of The Vineyards, Great Baddow; Gloucester Avenue, Moulsham Lodge; Newlands Spring, North Melbourne; and Village Centre, Chelmer Village.
- Area Action Plans for Chelmsford City Centre (CTCAAP) and North Chelmsford (NCAAP) have been adopted and set out the guiding principles for development. The CTCAAP identifies 37 opportunity sites for across the city centre's eight character areas and promotes retail expansion of the city centre. The NCAAP promotes a new local neighbourhood centre and new local centre on sites to the north of Chelmsford to support substantial new housing growth planned here.
- The Site Allocations DPD (2012) allocates land for a range of uses to support the spatial vision and objectives of the Core Strategy. It identifies the potential for further

development of retail, commercial, community and residential uses in South Woodham Ferrers Town Centre and the Principal Neighbourhood Centres.

- The Council is currently in the process of preparing a Local Plan. The study will help to inform this process.

3. Retail Market Review and Town Centre Trends

3.1 To put our assessment into context and inform our advice on the need for additional retail floorspace in the study area, we have undertaken a review of the current retail market and social trends influencing the retail sector. Our review draws on published data sources, including research by Experian and Verdict.

3.2 This section also provides a brief analysis of relevant government research and town centre strategies which have come forward over the last few years, partly in response to the retail trends identified, to promote a consistent policy objective which seeks to strengthen town centres.

Economic Outlook

3.3 Advice published by Experian (Retail Planner 12.1, 2014) identifies that the UK economy has improved in recent times, driven by consumer spending. As inflation continues to ease steadily, and output and employment growth accelerate, household finances will gradually improve and retail spending growth will increase.

3.4 The consensus outlook for the medium term is for annual average GDP growth of about 2.4% over the next five years, which is slightly below the long term trend rate and less buoyant than before the recession. This is primarily due to pressure on government finances, weak bank lending and high household debt. Over the longer term the rate of economic growth is predicted to improve slightly, however due to continuing fiscal restraint this growth is likely to be constrained.

Population Change

3.5 The rate at which the UK population is growing is accelerating. Between 1971 and 1991 it increased by just over 0.1% pa, whereas over the subsequent 20 years it increased by almost 0.5% pa. Over the next 10 years (2013-23) it is expected to increase by just over 0.7% pa, or 7.5% in total. This population growth will vary between regions over the next 10 years, with London expected to show the strongest growth (+12.5%), followed by the East and the East Midlands regions (+9.8%). This contrasts with growth of just 3.3% in the North East. Marked disparities can occur between local authorities within the same region, due to differences in housing demand, land availability and local policies.

3.6 Advances in healthcare and medicine mean that people are living much longer. It will therefore be increasingly important for Councils to ensure that older consumers are adequately catered for with the right type of facilities in the right locations. The proportion of the population aged over 65 is expected to increase from 17.5% of the total population in 2013 to 19.5% in 10 years' time, a growth rate of 20%, which is more than double the rate of total population growth (7.5%).

Retail Expenditure and Sales Efficiency

Retail Expenditure Growth

3.7 Comparison goods spending is expected to grow at a much higher rate than convenience goods spending over the plan period. For comparison goods, expenditure growth per head was 0.5% in 2011, increasing to 2.6% in 2012 and 4.6% in 2013 according to Experian. Between 2015 and 2025 annual average growth is expected to be around of 3.3% pa. For convenience goods, spending declined between 2011 and 2013. However, Experian estimate a return to positive expenditure growth between 2015 and 2025 of around 0.6% pa.

3.8 To put these forecasts into historical context, comparison goods growth averaged 4.2% pa over the last 40 years, with stronger growth of 5.2% pa over the last 30 years and 5.6% pa over the last 20 years. Convenience goods growth has been much weaker, averaging 0.4% pa over the last 40 years and 0.3% pa over the last 20 years.

Online Spending

3.9 The popularity of online retailing grew rapidly between 2008 and 2012. Most retailers now have an online presence, thus it is expected that this growth will slow. It is, however, likely to continue outpacing growth in total retail sales each year from 2013 to 2018, rising from £33.7bn to £50.2bn, an overall increase of 49%[1].

3.10 Internet spending and other forms of sales which are not derived from physical floorspace need to be taken into account when undertaking retail studies. Special Forms of Trading (SFT), includes all types of non-store retailing (internet, markets and mail order) and in 2013

[1] Verdict: Online & Remote Shopping, E Retail in the UK (August 2013)

was equivalent to 12% of total retailing (15.6% for comparison goods and 8.5% for convenience goods). In 2018, Experian predict that non-store sales (SFT) will reach 17% of total retail, growing steadily until it plateaus at around 21% by 2026.

3.11 Not all of non-store sales reduce the need for physical floorspace (for instance click and collect and the fulfilment of many grocery internet orders through local stores). Therefore, to account for this when calculating the effect of SFT on the need for retail floorspace, Experian recommend adjustments of 11.1% for comparison goods and 2.3% for convenience goods in 2013. These are forecast to rise to 15.3% and 3.8% respectively by 2019[2].

Sales Efficiency Growth

3.12 The sales efficiency growth rate represents the potential ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (e.g. rent, rates and service charges) by increasing their average sales densities. Applying a turnover 'efficiency' sales density growth rate is a standard approach used in retail planning studies and has been used in this study in accordance with good practice.

3.13 Following the weak or negative overall sales growth during the recession and the growth of online shopping, many retailers have struggled to increase or maintain sales density levels and, together with other financial problems, this has led some retailers into administration. As a result sales density growth is now significantly lower than the high rates seen during the boom of the latter half of the 1990s and first half of the 2000s.

3.14 The trend towards the demolition of inefficient stores and the provision of more modern stores with higher and more efficient sales densities is expected to result in less scope to increase comparison goods sales densities in the future. Accordingly, Experian expect an efficiency growth rate for comparison goods of c. 2.6% pa between 2017 and 2021 and 2.2% pa between 2022-2035.

3.15 Scope for increased sales densities is even more limited for convenience goods because the majority of foodstores already drive high sales efficiencies. An efficiency growth rate

[2] Experian: Retail Planner Briefing Note 12.1, October 2014

of close to zero % pa between 2014 and 2030 is recommended by Experian and these assumptions inform our approach.

Internet Growth & Multichannel Retailing

3.16 The online shopping population is reaching saturation, with over 40m online shoppers in the UK expected by 2017. Future growth in the market is likely to come from increased spend driven by new technology and improved delivery options. Changes in technology are driving sales with the expansion of tablet devices which provide a better browsing experience. According to Verdict, in most sectors the average spend per trip is 64.5% higher on a tablet than a laptop/PC[3].

3.17 Click and collect is forecast to be one of the most significant drivers of growth, with a rise of 62.7% in click and collect purchases expected between 2013 and 2018[3]. The service provides physical retailers with an important benefit over pure internet operators and creates opportunities for making additional purchases when customers collect orders from stores.

3.18 The growth in online sales has implications for bricks and mortar stores as it potentially reduces the need for so many outlets. However, trends indicate that online and in-store shopping channels are becoming more blurred as shoppers increasingly research items online or in stores before making purchases. According to Verdict, in 2012 61% of shoppers researched goods online before purchasing in store, and some 38% of customers researched goods in store before buying online.

3.19 These trends, combined with the importance of ‘click and collect’ highlight that physical stores will still have a significant role in the multichannel shopping environment, although their size and format will differ from traditional stores. The advantages of physical stores, in terms of the shopping experience, service and immediacy of products in a showroom setting, will see a network of key stores remain a fundamental component of retailer’s strategies to provide an integrated multichannel retail proposition.

[3] Verdict: Online & Remote Shopping, E Retail in the UK (August 2013)

Changing Retailer Requirements

Space Requirements

3.20 The retail sector has undergone significant changes over the last decade which has fundamentally altered how, where and when we shop. This has had major implications for retailers' space requirements, which combined with the recent recession, has changed the retail landscape of our towns and cities.

3.21 During the recession retailers' margins were squeezed, whilst other costs continued to rise and a raft of multiple and independent retailers either collapsed or have significantly shrunk their store portfolios. The decline in the amount of occupied retail space in town centre locations has not typically been offset by new retail developments. Many town centre schemes have been put on hold or significantly scaled down in size, and with 'fairly weak' expenditure growth forecast in the medium term, retailers are expected to remain cautious about store expansion.

3.22 The growth of the internet means that retailers no longer need stores in every town to achieve national coverage. Many retailers are therefore focusing their development programmes on the provision of large flagship stores in strategic locations, supported by smaller satellite stores and transactional websites. The larger flagships accommodate full product ranges whilst smaller stores offer more select ranges, supplemented by internet kiosks allowing access to the full range. This offers many advantages to retailers including lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions.

3.23 This polarisation of retailing will result in larger dominant centres continuing to attract key retailers (where space is available), with medium sized centres potentially struggling to attract investment. Local, or neighbourhood, centres should be less affected by this trend and are likely to retain their attraction for top-up and day-to-day shopping. This changing retail structure needs to be considered carefully when analysing household survey results as it will have implications on how to plan for growth and change.

Out-of-Centre Retailing

3.24 Retailers are opting to develop stores in the most strategic and cost effective locations, with a notable resurgence of out-of-centre destinations, which offer benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict, out-of-town retailing is the only form of retailing which has seen store numbers increase consistently since 2000. The Department for Business, Innovation and Skills (BIS) reports that the number of out-of-centre stores has increased by up to c.1,800 (25%) since 2000; whilst the number of town centre stores fell by almost 15,000 between 2000 and 2009, the majority of which are likely to have been in 'high street' locations.

3.25 Many traditional town centre retailers have developed out-of-town store formats, including John Lewis, who now operate a number of 'At Home' stores in out-of-centre locations, as well as other retailers such as Next, Primark and H&M.

The Role of the Town Centre

3.26 The town centre has been the main shopping channel for centuries. However, with weaker expenditure growth and the loss of trade to out-of-centre and online, its future role is set to change dramatically. Emerging trends suggest that many centres will be used increasingly for leisure and social activities as well as traditional retailing, with more bars, restaurants, food outlets and community spaces opening in vacant units.

3.27 As retailers improve their multichannel offer, the expectation is that town centre stores will be used increasingly as showrooms and to support e-retailing (with click and collect points and safe drop boxes for customers to collect online orders, and in-store kiosks for customers to make online purchases). Towns will need to capitalise on the opportunities that click and collect services offer. Where overall demand for retail floorspace stabilises or declines, it is anticipated that more secondary and tertiary space, which suffers from lower levels of footfall, will increasingly be converted into alternative town centre and residential uses.

3.28 Enhancing the non-retail offer so towns function as more than just retail locations will also help drive footfall and increase dwell time. Towns should promote unique attractions such as heritage assets, historic buildings and cultural features which can differentiate a centre and improve its attractiveness.

3.29 To ensure that town centres have a viable function moving forwards they must provide an attractive shopping and leisure experience which the internet is unable to match. Councils /town centre managers need to gain a better understanding of the catchment and what local people want from their town, to provide the right mix of outlets and services. A vital component of this will be making town centres as accessible as possible, with improved and cheaper car parking.

3.30 An important consideration for councils and town centre managers over the next few years will be that many retail leases are due to expire, which will enable retailers to easily exit properties in poorer performing locations. This situation needs to be monitored closely and reinforces the need to improve town centres.

3.31 Some of these trends have recently been identified and promoted by the Government in the Portas Review, the Government's Response to the Portas Review and a Government supported industry taskforce report.

Retail Sector Trends

Food and Grocery

3.32 The top four supermarkets continue to dominate the market and represent approximately 60% of the total convenience market[4]. With vast store networks and online offers, their coverage is reaching peak levels. Combined with weaker spending on convenience goods and the transfer of trade online, expansion plans are increasingly focused on redevelopment and refurbishment of existing stores rather than on new large hypermarket type stores. In some cases, for example Tesco, space within their larger format stores is being sub-let to restaurants, gyms and children's play centres.

3.33 The development of smaller store formats for top up food shopping has become increasingly popular in response to consumers seeking to reduce waste by moving from weekly shops to more frequent smaller shops, or to avoid the high fuel prices associated with travelling long distances. As a result, many of the main operators are expanding their smaller concept stores - Tesco Express, Sainsbury's Local, M Local, Little Waitrose, etc.

3.34 The value/discount retailers are continuing to expand, having gained considerable market share during the recession. Aldi and Lidl have both succeeded in attracting customers who are looking to trade down in price but not quality, and between 2009 and 2013, Aldi has doubled its market share to 3.2%, whilst Lidl's market share has risen to 2.0%.

[4] Verdict: Food & Grocery Market Forecasts, December 2013

3.35 Food retailers are also continuing to develop online offers to meet increasing consumer demand for convenient food shopping, much of which is still fulfilled through existing store networks. Click and collect services are expanding into the grocery sector with some retailers developing ‘drive-thru’ collection points for picking up online orders.

Clothing and Footwear

3.36 By 2017, Verdict estimates that the clothing and footwear sector will represent 15.9% of total retail spend (a marginal increase from 15.2% in 2012). The proportion of clothing sales transacted online is currently around 12.4% and is expected to rise to just over 20% by 2017 as browsing services improve.

3.37 Low levels of consumer confidence in addition to high prices are expected to keep clothing and footwear sales volumes low. Premium and luxury brands will continue to maintain their consumer appeal, whilst growth from value retailers will become more subdued as they seek to ensure their profitability.

Premium and Luxury Goods

3.38 More affluent consumers have been able to maintain a higher level of personal and discretionary spending during the recession and therefore the premium and luxury goods sector has remained relatively strong. There is still high demand for premium brands and goods across all retail sectors, from clothing and accessories to high tech items.

3.39 In response to this trend, Verdict predict that the premium sector of the UK department store market (e.g. Harrods and Selfridges) will account for 43% of total department store expenditure in 2017 as midmarket department stores (e.g. John Lewis, House of Fraser and Debenhams) expand designer and luxury goods ranges.

Electricals

3.40 The electrical sector has suffered as a result of the recession as households cut back on ‘big ticket’ items combined with the shift of spending online. Since 2008 the proportion of electrical spending which takes place online has more than doubled to 43%[5]. Casualties in the sector include Comet and Jessops, along with Best Buy who exited the UK market.

3.41 Growth remains strong however for smaller, high tech items such as tablets and premium electrical goods, with retailers such as Apple and John Lewis continuing to do well. There is also demand for 'value' ranges of electrical goods, much of which has been captured by the supermarkets. Over the medium-term at least, sales of big-ticket items are likely to remain subdued.

Homewares

3.42 Growth in the more traditional part of the homewares market (such as furniture and floorcoverings) is heavily reliant on the housing market and has been weak in recent years. Growth is expected to remain subdued during 2014, but will improve as the housing market strengthens. The softer end of the homewares market (i.e. smaller more decorative items), has been more resilient as consumers look at cheaper ways to refresh their homes.

Music, Video and Books

3.43 Technology is removing the need for physical stores as consumers can now download/stream music and films directly. As a result the music and video sector has shrunk significantly with negative growth in retail spending. Over three quarters (78%) of music and video sales are now online and Verdict predicts that by 2017 online sales will account for 90% of the market[4].

3.44 The book sector has been heavily influenced by the growth of e-reader devices (e.g. Kindle), and the sector is increasingly moving from physical to digital products. By 2018 it is estimated that just fewer than three-quarters of the book market will be online, with almost half of the online market attributed to digital sales.

[5] Verdict: UK Retail Review & Sector Forecasts to 2017

Relevant Government Research

The Portas Review (December 2011)

3.45 In May 2011, Mary Portas was appointed to lead an independent review into the future of the high street, in response to the effects of the recession on the retail industry and local high streets in particular.

3.46 The report suggested measures to tackle the further decline of the high street. Amongst 28 separate recommendations, there is a call to strengthen policy in favour of 'town centres first' following the publication of the (then draft) NPPF. In summary the recommendations aim to:

- Run town centres like businesses: by strengthening the management of high streets through 'Town Teams', developing the BID model and encouraging new markets;
- Get the basics right: by looking at how the business rate system could better support small businesses and independent retailers, encouraging affordable town centre car parking and looking at further opportunities to remove red tape on the high street;
- Level the playing field: by ensuring a strong town centre first approach in planning, introducing Secretary of State 'exceptional sign off' for out-of-centre proposals and encouraging large retailers to show their support for high streets by mentoring local businesses;
- Define landlords' roles/responsibilities: by looking at disincentives for landlords leaving properties vacant, empowering local authorities where landlords are negligent and making proactive use of Compulsory Purchase Order powers; and
- Give communities greater say: by including the high street in neighbourhood planning and encouraging innovative community uses of empty high street spaces.

Government Response to Portas

3.47 The Government published its formal response to the Portas Review in March 2012, which accepted the majority of Portas' recommendations. It announced a number of 'Portas Pilot' towns, which were chosen to set up Town Teams to create plans for the future of their high streets. In addition, the Government announced their intention to provide investment to help Business Improvement Districts (BIDs) access loans for set-up costs and provide funding for a Future High Street X-Fund (now rebranded as the High Streets

Renewal Fund) to reward towns which are delivering innovative plans to bring their town centres back to life. Other initiatives included a National Market Day in June; plans to double small business rate relief; community involvement in the redesigning the concept of their high streets to reinvigorate areas of decline, to increase footfall and encourage people to live in town centres.

3.48 One measure which did not receive Government support was the call to introduce Secretary of State 'exceptional sign off' for all new out-of-town developments and require all large new developments to have an 'affordable shops' quota. The Government stated that LPAs are best placed to understand local needs and 'exceptional sign off' is contrary to the Government's ethos of devolution. As such, the Government will continue to use the call-in power sparingly.

3.49 Arising from key recommendations in the Portas Review, the Government supported the establishment of an industry taskforce to analyse retail property issues relating to town centres. This taskforce published their report, Beyond Retail – Redefining the shape and purpose of town centres in November 2013 and their principal recommendations for achieving rejuvenated town centres fit for the future requires:-

- Retail capacity models need to fully reflect the impact of the growth of online shopping.
- Greater engagement with the private sector to improve local authority skills and understanding of market demand and trends so that the retail core can be strengthened and re-configured, re-using obsolete areas for new uses.
- Proactive use of Compulsory Purchase Orders (CPO) to enable regeneration of town centres, alongside an urgent review of the complexity and costs associated with CPO.
- A workable, private sector led Tax Increment Finance (TIF) model in addition to traditional funding models for town centre redevelopment.
- Local authorities to take more risk in investing capital reserves now to help improve town centres, which can be repaid as the local economy recovers.
- Piloting the concept of a joint venture vehicle and associated high street property fund so that land assets can be pooled which would overcome fragmented ownership.
- The National Planning Policy Framework (NPPF) to be reinforced, further strengthening the 'town centre' first approach to planning policy.

- Town centres to develop an integrated digital strategy, incorporating mobile, social media and website, to encourage more shoppers and longer visits.
- A business rate cap until the next revaluation takes effect in 2017, using this time to undertake a full review of the business rates system as a sustainable means of raising money towards paying for local government.
- The quality, quantity and cost of town centre car parking to be reviewed in relation to free out-of-centre provision. Flexible parking policies are needed to attract town centre visitors.

Summary

- Economic growth will continue to remain muted over the plan period, with relatively weak expenditure growth in the short-medium term.
- It is evident that the traditional high street faces a number of challenges, not least from the impacts of the recession, including tightening of retail spending and changing consumer behaviour, but also from increasing competition posed by the internet, multichannel retailing and out of centre developments.
- Town centre strategies which support the continued evolution of the high street are considered ever more vital. This may involve providing a high quality shopping 'experience', maximising the benefits of tourist trade, and improving the mix of retail and non-retail outlets to increase length of stay and spend.
- It will be important for town centres to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the development plan period and to reaffirm their unique selling points which differentiate their retail offer from other centres.
- The on-going pattern of polarisation suggests that larger centres are well placed to maintain and enhance their offer. However, this is dependent on continued investment to ensure the right mix of retailers and other services.

4. Competing Centres

4.1 Before considering the current state of retail provision within Chelmsford, it is first important to consider the role of the Chelmsford within the wider sub-region. This section therefore provides a brief overview of nearby competing centres, highlighting any changes in the main retail offer of each centre and how this has influenced the attractiveness of each competing centre and the extent to which they influence shopping patterns in City Council Area.

4.2 We have drawn on the household survey and the results of the 2005 Retail study to identify Chelmsford's principal competitors, and the challenges posed by new developments planned or underway within them. Following a brief overview of the ranking of each centre (as set out by Javelin VenueScore), this section considers the current role, market share influence on residents within the study area and the potential implications of planned new development in each centre.

4.3 This section is informed by the results of the household telephone interview survey, as well as other data sources including Javelin Venue Score, Experian Goad Reports; Co-Star Focus Property Intelligence database, and EGi.

Ranking

4.4 VenueScore is an annual survey compiled by Javelin Group, which ranks the UK's top 2,700+ retail venues including town centres, stand-alone malls, retail warehouse parks and factory outlet centres. VenueScore rankings are based on a consistent, weighted scoring system which seeks to measure the overall attraction of each venue compared to other venues across the country.

4.5 VenueScore evaluates each centre in terms of its provision of multiple retailers – including anchor stores, fashion operators and non-fashion multiples. The sectors covered include comparison retail, convenience retail and foodservice (e.g. restaurants). The score attached to each operator is weighted to reflect their overall impact on shopping patterns. For instance, anchor stores such as John Lewis, Marks & Spencer and Selfridges receive a higher score than other stores. The resulting aggregate score for each venue is its VenueScore. The VenueScore reflects the presence and importance of multiple retailers trading in each venue, and generally correlates closely with the actual market size of these shopping venues in terms of actual consumer spending. The lower the number, the higher the ranking.

4.6 In addition to its Venuescore, each location is assessed in terms of a range of other attributes including:

- Market positioning (i.e. is the offer aspirational or down-market?)
- Age focus (is the offer targeting younger or older consumers?)
- Fashion focus (how dominant is the venue's clothing offer?)
- Fashionability of its offer (is the clothing offer traditional or progressive?)
- Foodservice bias (how strong is the food and beverage offer?)
- Comparison vs. convenience bias
- Anchor strength (how much of the overall score is delivered by major anchors such as department stores, variety stores, supermarkets, etc.)
- Shopping centre vs. high street dominance (is there a powerful mall offer?)

4.7 Table 4.1 below demonstrates how the ranking of Chelmsford in comparison to competing sub-regional centres has changed since the previous 2005 retail study.

Table 4.1: National Centre Rankings

Centre/Shopping Destination	2005	2011	2014	Change
Chelmsford	**118**	**87**	**69**	**+49**
Basildon	82	99	**94**	-12
Bluewater Shopping Centre	19	29	**26**	-7
Braintree (centre)	327	343	**297**	+30
Braintree Freeport Factory Outlet	514	414	**324**	+190
Cambridge	71	36	**28**	+43
Colchester	58	68	**67**	-9
Harlow	179	196	**165**	+14
Lakeside Shopping Centre	57	60	**52**	+5
Westfield Stratford City	-	54	**30**	

Source: VenueScore 2005, 2011 and 2014. The lower the number, the higher the ranking.

4.8 As shown above, Chelmsford's rank has gone up 49 which, along with Cambridge and Braintree's factory outlet centre, is one of the best performing centres over the past nine years. In an era which has been characterised by difficult retail markets, this is an indication of the centre's continued health and attractiveness. The centres in the sub-region with the highest national centre rankings are Bluewater, Westfield Shopping Centre and Cambridge. As shown in Table 4.2 below, both are the centres which are located farthest away from Chelmsford, which may help explain Chelmsford's improvement in the retail rankings and comparative resilience to competition.

Table 4.2: Competing Centres, Key Indicators

Centre/Shopping Destination	Distance from Chelmsford (miles)	Drivetime from Chelmsford (mins)	Floorspace (sqm gross)	Retail requirements (no.)
Chelmsford	-	-	111,809	37
Basildon	15	27	106,652	15
Bluewater Shopping Centre	31	41	136,926	22
Braintree (centre)	14	27	39,836	9
Braintree Freeport	13	27	37,672	1
Cambridge	41	66	148,756	106
Colchester	24	34	99,638	29
Harlow	20	38	82,888	10
Lakeside Shopping Centre	24	32	126,543	16
Westfield Stratford City	31	50	175,000	10

Source: Distance and drivetime from Google Maps. Other than Westfield, floorspace from Experian Goad Summary Reports and therefore counts ground floor only. Retail requirements from Co-Star Focus (July 2014).

4.9 Our review of national retail trends identifies a significant polarisation of retail activity in the wider area, with a relatively small number of large dominant regional and sub-regional centres taking a growing proportion of total spend. This, combined with Chelmsford's relative distance to other competing sub-regional centres, indicates that the city centre is in a good position to continue to build upon its important sub-regional retail role.

Market Share

4.10 The results of the household survey give us an indication of the relative attractiveness of retail offer in the various sub-region. The tables below set out the amount of comparison goods expenditure that each centre draws from the survey area (Table 4.3). It compares the results of the most recent household surveys to the 2005 study in order to highlight any changes in the relative attractiveness of these centres over time.

Table 4.3: Comparison Goods Trade Draw of Key Competing Centres from Study Area

Centre/Shopping Destination	Market Share (%) 2005	Market Share (%) 2013	Change (% pts)
Chelmsford Total	**36.8**	**34.6***	
City Centre	*29.8*	*25.4*	*-4.4*
Out of Centre	*7.0*	*9.2*	*+2.2*
Basildon	12.5	10.2	-2.3
Bluewater Shopping Centre	1.5	1.5	-
Braintree (centre)	11.3	5.1	-6.2
Cambridge	3.3	2.6	-0.7
Colchester	10.4	6.0	-4.4
Harlow	1.8	2.6	+0.8
Lakeside Shopping Centre	5.5	7.6	+2.1
Westfield Stratford City	-	0.4	+0.4

Source: 2005 Retail Study and 2013/5 survey results. *market share of city centre and retail warehouses

4.11 As shown in Table 4.3 above, the household survey results show that Chelmsford retains 34.6% of total comparison goods expenditure from across the survey area as a whole. The City Centre accounts for 25.4% of total comparison expenditure, the highest market share achieved by any of the other centres assessed. This is particularly impressive given the size of the study area (extending well beyond the Chelmsford City Council Area) and its proximity to other competing destinations.

4.12 Table 4.3 also shows that Chelmsford's comparison goods market share across the study area as a whole has decreased between 2005 and 2013/5 which comprises a call in the city centre's market share and a rise in the share of out of centre stores.

Profile of Competing Centres

Basildon

4.13 Basildon located approximately 15 miles to the south of Chelmsford, partially within Zone 7 of the survey area. It is identified as the only Regional Town centre within Basildon District. It is well connected to London and the M25 via the A127 to the north of the town and the A13 to the south. The A130 provides a direct link to Chelmsford and other destinations to the north.

4.14 Basildon town centre is a purpose-built centre which was originally developed in 1958. It provides a range of services and cultural facilities and has 106,699 sqm (gross) of ground floor retail and service floorspace according to the most recent Goad report.

4.15 The central area is surrounded by a dual carriageway ring road and most streets within are pedestrianised. The Town Square is a wide open-air precinct in the centre of town and is anchored by Marks & Spencer, BHS, Boots and Primark. It used to be the primary retail pitch in the town however activity has shifted to the centre's managed shopping centres and the area now appears dated and run down.

4.16 Basildon has two managed shopping centres within the centre: The Eastgate Shopping centre and the Westgate Shopping Park. The Eastgate Shopping Centre is the prime retail pitch within the town centre and accommodates a range of retailers including ASDA, Debenhams, H&M, Superdry, Topshop and River Island. It originally opened in 1981, was extended in 1985 and now comprises approximately 73,000 sqm (gross) floorspace. Eastgate benefited from substantial refurbishment in 2007, which included a number of both environmental and operational improvements such as a newly designed Food Terrace area with an expanded seating area, replacement lifts, lighting, escalators, floors and fascias. It also has its own multi-storey car park for approximately 1,000 vehicles, which was refurbished in 2012.

4.17 The Westgate Shopping Park is located on the western edge of Basildon town centre, just within the western ring road. The shopping park opened in 1999 and is comprised of 12 larger retail warehouse type units ranging in size between 500 sqm around 3,000 sqm. In total it has a retail floorspace of approximately 14,000 sqm gross and accommodates some of the town's retailers such as Argos, Wilkinson's, JD Sports, Hobbycraft, Brantano, JD Sports, Maplin, Laura Ashley and Dreams. Although it is not strictly within the town centre boundary it is immediately adjacent to the pedestrianized shopping area and therefore appears to function as part of the town centre.

4.18 According to the latest Retail Study for Basildon (2011), the centre contains a significant amount of obsolete retail and office space. There is a high level of vacancy in peripheral areas, particularly on the eastern half of the centre, where there has been little meaningful development or up-grading of existing units.

4.19 As of January 2014, there are 15 stated requirements in the centre. Although this is down from 40 recorded in 2005, it can be partly explained by the challenging economic climate and resultant fall in retailer requirements.

4.20 With respect to market shares, the results of the household survey show that Basildon accounts for approximately 10% of total comparison goods expenditure within the entirety of the survey area. It is therefore clear that the centre has experienced retail decline in recent years, no doubt influenced by the centre's proximity to attractive sub-regional shopping destinations (such as Lakeside Shopping Centre and Westfield Stratford City).

4.21 We understand that the Council's position moving forward will be to improve the quality of town centre retail offer rather than increase retail floorspace. However, there are plans for significant new investment in leisure provision in Basildon which may influence the overall attractiveness of the centre for residents in the survey area. The Council are working with Barratt Wilson Bowden and other key partners to deliver various improvements to the town centre over the next 20 years. The Adopted Basildon Masterplan (December 2012) sets out the Council's ambitions to regenerate a number of sites in the town centre to deliver a new 8-12 screen art cinema, restaurants, bars and new and improved public spaces. It is anticipated that the integration of complementary leisure uses in the town centre will help to enhance the overall shopping experience, with a vibrant and high quality evening economy.

Bluewater Shopping Centre

4.22 Bluewater is a large, out-of-centre regional shopping centre approximately 31 miles south of Chelmsford, in Dartford Borough Council. It is located outside the defined study area, to the southwest of Zones 7 and 8.

4.23 The shopping centre originally opened in March 1999 with a total of 139,355 sqm (gross) retail floorspace and 13,935 sqm (gross) leisure floorspace. The retail mall is arranged over two levels and is anchored by House of Fraser, John Lewis and Marks and Spencer. Leisure facilities are a key element of the Bluewater 'experience' and include a 13 screen cinema, restaurants, pubs, crèche and various play areas. There has been significant investment in expanding the leisure offer in recent years. In 2010 Pirate Cove Adventure Cove opened around the Winter Garden Lake and includes 36 holes of mini golf, an aerial assault course and pedalos for the lake. In late 2011 a two-storey Events Venue opened adjacent to the cinema, providing 5,200 sqm of events and exhibition space. As part of this development a southern extension to the centre was built to accommodate more restaurants including Jamie's Italian, Wagamamas, and Browns.

4.24 Bluewater has the highest Javelin VenueScore ranking of the sub-regional retail destinations we have reviewed as part of this study. We understand that it has been trading well through the recession, and has continued to attract new occupiers, with 34 brands opening in new stores in 2010 alone. There are currently 22 published retail requirements for the shopping centre.

4.25 The 2013/2015 household survey results show that there has been no change in the market share of Bluewater, at 1.5%.

4.26 An outline application for 30,500 sqm (net) extension to the shopping centre was approved in August 2013 (reference 12/01464/OUT). This will increase the size of retail and leisure floorspace in the shopping centre by approximately 20% and make it the largest regional shopping centre in the nation.

Braintree

4.27 Braintree is located approximately 14 miles north of Chelmsford. It is the main high street comparison shopping destination and highest ranking centre within Braintree District. It is the lowest ranking centre in the sub-regional area by a significant margin and its position has increased between 2005 and 2014 (from 327 to 297). This is reflected in the limited demand for representation in Braintree, with only 9 stated requirements according to Co-Star Focus.

4.28 The town centre comprises over 40,000 sqm (gross) of retail and service floorspace. The main focus of comparison goods retailing in the town is George Yard Shopping Centre. It is the only managed shopping centre in Braintree and has a retail floorspace of approximately 11,000 sqm gross across 36 units. It is anchored by Boots the Chemist, Co-op Department Store and W H Smith, and supplemented with a range of mid to lower order comparison goods retailers including Burtons, Clarks, Dorothy Perkins, Carphone Warehouse, Superdrug, Peacocks and the Mobile Phone Centre and also has an Iceland food store. The centre has an adjacent multi-storey car park with 725 parking spaces.

4.29 There is a significant amount of out-of-centre comparison goods floorspace in the Braintree urban area. To the south of the town centre off the A120 is Freeport Factory Outlet Village. It opened in 1999 comprises 18,900 sqm gross floorspace across 75 units. It accommodates a wide range of designer and 'high end' clothing and homeware products at discounted rates. Some of the retailer present include Nike, Reebok, Next, M&S, Barbour, Karen Millen, Jaeger, Lacoste, Ted Baker, Tommy Hilfiger and Gap. In 2002 Freeport expanded to include a 10,000 sqm leisure complex. The leisure centre includes a multi-screen cinema, Health & Fitness Club, family entertainment centre and major restaurant operators, all of which contribute to the combined attractiveness of the area.

4.30 Directly adjacent to Freeport is Braintree Retail Park, the district's main retail warehousing destination, which comprises 9,445 sqm (net) floorspace. It is primarily occupied by bulky goods retailers such as Pets at Home, Carpet Right, B&Q, Halfords, etc.

4.31 Braintree is located within Zone 11 of the survey area. The results of the household survey show that the market share for comparison goods expenditure retained in Braintree area (including both the town centre and out-of centre floorspace) has dropped from 11.3% in 2005 to 5.1% in the latest surveys. The available evidence from surveys undertaken by Braintree District Council in recent years indicate that the town centre has lost market share in terms of both convenience and comparison goods shopping.

4.32 In recent years there has been a proposal for a large out-of-centre Sainsburys supermarket at the western edge of the urban area. This was considered at a public inquiry in December 2014 and the Secretary of State dismissed the appeal in June 2015.

Cambridge

4.33 Cambridge is located 41 miles to the north west of Chelmsford. Cambridge city centre is a prominent regional shopping centre as well as a key tourist destination and university town. After Bluewater, it is the highest ranked retail destination in the sub-region and has jumped from 71st to 36th position between 2005 and 2013. Retail demand for representation in the centre remains strong and is the highest within the sub-region.

4.34 The city centre currently comprises 148,756 sqm (gross) ground floor retail, leisure and service floorspace across 711 units. Cambridge has a strong comparison shopping offer, which is concentrated in the historic core and the Fitzroy/Burleigh Street area. The historic core accommodates the majority of the centre’s retail and service floorspace and includes a John Lewis (which occupies a five floor unit in the Grand Arcade), a Marks and Spencer (which operates two sizeable units). It also has strong representation from high-end, quality fashion retailers (such as Hugo Boss, Gerry Weber, Guess and Gant) as well as the more mainstream, high street retailers (e.g. Topshop, H&M and Zara).

4.35 There are two interconnected managed shopping centres in the historic core: Lion Yard Shopping Centre and Grande Arcade. Lion Yard is located within the historic core and originally opened in 1974. It is the smallest shopping centre in Cambridge, accommodating around circa 11,000 sqm (gross) across 54 units. Parts have recently been refurbished to improve integration with the adjacent Grand Arcade. The Grand Arcade opened in 2008 and is the main shopping centre in the historic core. It was developed to seamlessly connect to Lion Yard and comprises c.41,000 sqm gross retail and service floorspace across approximately 60 units and is anchored by a John Lewis department store. The centre comprises a mix of high-end, quality fashion retailers (e.g. Hugo Boss, Gant, L.K. Bennett, Kurt Geiger and Charles Tyrwhitt) amongst a range of more typical high street fashion retailers including Topshop, River Island, Warehouse, Jane Norman and Schuh.

4.36 The Fitzroy/Burleigh Street is north east of the Historic Core and comprises a pedestrianised shopping area and the Grafton Centre, a purpose-built shopping centre comprising approximately 38,460 sqm gross retail floorspace. The retail offer at the Grafton Centre has more emphasis on mainstream fashion with retailers Debenhams and Bhs occupying the anchor stores. Other retailers represented in the centre include Oasis, Next and Boots. The centre is more family-orientated and there is a leisure element which includes an eight-screen Vue cinema and restaurants and cafes such as Bella Italia and Costa Coffee.

4.37 Cambridge is located outside of the catchment area, to the north/northeast of zone 9. The results of the household survey show that Cambridge accounts for 2.6% of total comparison expenditure within the survey area, slightly down from the 3.3% recorded in 2005.

Colchester

4.38 Colchester is located approximately 24 miles to the north east of Chelmsford. It is one of the largest centres in Essex and is at the top of the retail hierarchy in Colchester Borough. It is the administrative centre of the borough and supports a wide range of retail, service and community facilities.

4.39 According to the most recent GOAD plan, the centre has 99,583 sqm (gross) of ground floor retail, service and leisure floorspace in the centre across 589 units. There are three managed shopping centres within the centre: Culver Square, Lion Walk and St. Johns Walk. Culver Square is an open-air precinct development which opened in 1987. At 31,600 sqm (gross) it is the largest in the centre and is anchored by Debenhams, H&M, USC, and TK Maxx. To the east of Culver Square is Lion's Walk. It opened in 1976 has a retail floorspace of approximately 9,300 sqm (gross) across 40 units and is anchored by BHS, Boots, New Look, WH Smith and Marks and Spencer. Priory Walk is a shopping arcade which forms the pedestrianised link between the bus terminal and the town centre. It opened in 1967 and has a retail floorspace of approximately 9,300 sqm (gross) across 20 units. It is anchored by a large Sainsbury's foodstore, with other retailers including Holland and Barrett, Superdrug and Peacocks.

4.40 At the western end of the High Street, just north of Culver Square, is the independent William and Griffin department store. This six-storey store offers a number of quality concessions and is currently undergoing major renovation which will expand its floorspace by approximately 50% upon completion in spring 2016.

4.41 Colchester is located to the west of the survey area, outside of Zone 11. The results of the household survey demonstrate that there has been a substantial decrease in Colchester's market share for comparison goods expenditure within the survey area, from 10.4% recorded in 2005 to 6% in 2013/15.

4.42 There are several major development proposals in Colchester which will increase retail and leisure floorspace in the centre. The focus of redevelopment proposals is the St. Botolph's area at the eastern end of the town centre, which has fallen into decline. The first stage of development has already taken place and includes a new Visual Arts Facility and Magistrate's Court. Proposals for the next stage of development are being discussed with the Council and include an 85 room hotel, a mix of restaurants and cafes, residential apartments.

4.43 In December 2013 the Cabinet agreed to enter into a development agreement with Corinthian Curzon to redevelop part of the St. Botolph's Quarter into a three-screen boutique cinema and high quality restaurants.

4.44 There are also proposals for the Vineyard Gate shopping centre, which could include around 13,000 sqm of new retail floorspace. An application has been expected for some time but concerns have been expressed over the future progress of the scheme particularly in light of the current Stanway Village proposals on the edge of Colchester.

Harlow

4.45 Harlow is a new town located approximately 20 miles to the west of Chelmsford. Harlow is located in the London commuter belt, just west of the M11 which provides direct access to London in the south and Cambridge to the north.

4.46 It is at the lower end of the Javelin Retail Rankings compared to other sub-regional centres in the area, having increased from 179th to 165th position since 2005. There are 10 stated requirements for representation in Harlow. This is a fall from the 54 reported in 2005, however can be partly explained by the economic recession.

4.47 Harlow is one of the smaller centres in the sub-regional area, comprising 82,461 sqm (gross) ground floor retail and service floorspace across 262 units. The centre is characterised by three 'shopping quarters': Town Centre Central, North and South. The Central quarter is the core shopping area and most of it is pedestrianised. It includes the Harvey Centre (one of two managed shopping centres in the town). The Harvey Centre opened in 1982 and contains approximately 33,444 sqm of retail floorspace over two levels. It is served by a 770 space multi-store car park and is anchored by BHS, Superdrug, Boots, new Look and Primark.

4.48 Town Centre South predominantly comprises the Water Gardens development, which opened in 2004 and represents a significant extension to Harlow town centre. The 25,000 sqm (gross) development is anchored by an Asda foodstore and a range of retail units include H&M, Clarks Shoes, Dorothy Perkins, Poundland, Jane Norman, River Island, Topshop, and Next. The development is an open-air shopping environment oriented along a purpose built pedestrianised street which provides access to the Central area. The area also includes two large warehouse style units occupied by Matalan and TK Maxx, a 1,200 space multi-storey car park, new Council offices, a Virgin Active gym and restaurants and café units. Since opening, there has been a shift of retail activity from the North and Central shopping areas to the new development.

4.49 Town Centre North comprises a mix of retail and service uses, however in recent years it has also suffered from a cluster of vacancies potentially linked to a shift in retail activity to the Water Gardens. The majority of the area is pedestrianised and it incorporates Stone Cross, a large open space market which has been in operation since the 1950s. Australian developer Stockland originally entered into a development agreement with the Council to deliver 120,000 sqm of new town centre floorspace however pulled out during the recession in 2010. It is unclear what current intentions are for the site but we understand the Council is still seeking investment to regenerate the area and to help enhance retail offer and recover expenditure lost to other competing centres.

4.50 Across the study area, there has been a slight increase in Harlow's market share for comparison goods expenditure rising from 1.8% in 2005 to 2.6% in 2013/15.

Lakeside Shopping Centre

4.51 Lakeside Shopping Centre is an out-of-centre regional shopping centre located approximately 24 miles southwest of Chelmsford City Centre. It opened in 1990 and currently provides 126,399 sqm (gross) retail floorspace across 250 units over three levels. Main anchors include Debenhams, Marks and Spencer, Primark, and House of Fraser. The centre also includes a significant leisure offer, including a multiplex cinema, around 30 cafes and restaurants in a 900 seat food court, and the Alexandra Lake Water Sports Centre. It is supported by a 13,000 space multi-storey car park. It is in close proximity to Bluewater (which is just on the southern side of the Thames) and Westfield Stratford (which is 17 miles to the west via the A13).

4.52 In 2013 outline permission was granted for a circa 40,700 sqm (net) increase in retail floorspace to the northern end of the shopping centre. The plans represent £180m of investment and once implemented, the extension will deliver a further 40 stores and increase the size of the shopping centre by nearly a third. The works also include improved transport infrastructure, the provision of a road to the north of the centre. The development timetable is not yet set, as discussions are currently taking place with potential occupiers. Indeed, Co-Star only records 16 stated requirements for Lakeside.

4.53 In September 2013 a further outline application was submitted to create a series of new outdoors spaces, the focal point of which will be a large town square around a range of new leisure and restaurant uses are proposed over two levels. Proposals include plans for an extended cinema, new leisure and restaurant uses, a hotel, a new boardwalk and a park adjacent to the lake and would represent around £100m of additional investment. They represent an effort by the owners (Intu Group) to increase dwell time in the shopping centre by diversifying and providing complementary activities. If approved, construction would start in 2015 and the leisure development would open in 2017.

4.54 The results of the household survey demonstrate that there has been an overall increase in Lakeside's comparison goods market share across the survey area, growing from 5.5% in 2005 to 7.6% in 2013/15. The results indicate that it is one of the strongest competitors out of the competing sub-regional centres reviewed here. Significant planned retail and investment in the shopping centre indicate that the attractiveness of the centre, and its influence on shopping patterns in the sub-region, is likely to continue to grow.

Westfield Stratford City

4.55 In September 2011 Westfield Stratford City opened adjacent to the London Olympic Park. With a total retail floor area of 175,000 sqm, it is the third largest shopping centre in the UK by retail space, behind the MetroCentre and Trafford Centre. The shopping centre is arranged over three floors and comprises a total of 300 stores and around 70 restaurants. It is anchored by a John Lewis, Waitrose Supermarket, Marks & Spencer's department store and a 17-screen Vue Cinema. The centre also has a 24 hour casino, 267 room Premier Inn and another 350-bed hotel. It's supported by three multi-storey car parks, together providing 5,000 spaces.

4.56 Westfield is ranked 30th out of all centres, slightly above Lakeside (at 52nd) and close to Bluewater (at 26th). Westfield serves a wide regional and tourist customer base, however within the entire survey area Westfield only accounts for 0.5% of comparison goods retail expenditure. Within Chelmsford's core zone, it accounts for 0.4% of retail expenditure. The influence of Westfield therefore appears to be quite limited, with competition mostly coming from Lakeside and Bluewater.

4.57 Westfield forms part of Stratford Town Centre, which is identified in the 2011 London Plan as a Major Centre that has the potential to move up the regional hierarchy to Metropolitan Centre status. Due to unprecedented level of change in the area in recent years, the Draft Further Alterations to the Local Plan proposes an elevation of the status of Stratford to Metropolitan Centre, identifying potential for it to grow to the status of an

International Centre over the course of the plan period. The content of the DFALP indicates the high level policy aspiration to increase provision in Stratford and enhance its attractiveness as retail destination. This will have the potential to increase the level of attraction Stratford exerts over shopping patterns in the survey area, and will likely act as further competition as a destination for investment.

Summary

- Within the sub-regional area, the household surveys demonstrate that Chelmsford retains around one third of comparison goods expenditure within its core survey zones.
- The top sub-regional competitors remain Bluewater and Lakeside, with market shares attributed to these destinations growing between 2005 and 2013. The indication is that this trend will continue following implementation of significant extensions planned at both shopping centres. Westfield Stratford City draws limited trade from Chelmsford's core zones and from the study area as a whole.
- Cambridge continues to exert an influence over shopping patterns in the survey area, however retains a relatively minimal market share from within Chelmsford's core zones.
- Colchester's influence is falling both within the survey area and within Chelmsford's market share. There are several major development proposals in Colchester which will increase retail and leisure floorspace in the centre and seek to reverse this trend.
- Braintree's market share has fallen from within the survey area as a whole and increased very slightly within Chelmsford's core zones, although it remains at a very low level. Basildon, and Harlow have limited influence on shopping patterns within Chelmsford's core zones, however continue to influence shopping patterns within the wider study area. There are plans to regenerate parts of these town centres however they are unlikely to be of a sufficient scale to substantially extend their influence over shopping patterns in the sub-region.
- Collectively, the level of investment planned in the competing sub-regional centres will strengthen their role in the retail hierarchy, and increase their market share from the Chelmsford catchment area. It is therefore important that Chelmsford continues to evolve to improve its city centre offer in order to retain attractiveness and maintain market share

5. Qualitative Assessment – Chelmsford City Centre

5.1 In this section we set out our qualitative review of Chelmsford City Centre.

Methodology

5.2 We have adopted the following framework for undertaking the health check for Chelmsford, as well as other centres in the City Council Area (see Sections 6 and 7), which is informed by recent research undertaken on behalf of the Department for Business, Innovation and Skills: U*nderstanding High Street Performance* (2011):

- **Diversity of uses**: trends in the range and variety of uses and facilities on offer in the centre;
- **Economic activity**: the success of the high street as more than just a retail destination, taking into account vacancy/occupancy rates, activities derived from non-retail uses, the existence and potential for new investment, and the existence of key development sites.
- **Accessibility and footfall**: the number and frequency of visitors to the area, ideally over a range of dates and at different times of day. This will also include consideration of the wider accessibility of the centre by a choice of means of transport; and
- **Consumer and business satisfaction**: whether the centre satisfactorily serves the retail, social and community needs of local residents and businesses.

5.3 Within this framework, the report will consider a range of indicators specified in the NPPG where information is available. The purpose will be to highlight the strengths and weaknesses of each centre to inform emerging policy and assist in the determination of planning applications.

5.4 The health check for Chelmsford will be principally informed by, *inter alia*:

- The most recent Experian Goad Summary Report for Chelmsford (2014);
- Our own audits of Chelmsford City Centre undertaken in November 2013 and again in July 2014;
- The results of bespoke household telephone survey (December 2013 and Spring 2015) and an on-street visitor survey (November 2013), both undertaken by NEMS;

- Movement Study Report (July 2012) by Essex Highways;
- Pedestrian Market Research Services report of footfall activity in Chelmsford City Centre undertaken in July 2014;
- Footfall counts recorded in High Chelmer Shopping Centre, between 2013 and 2014;
- Co-Star Focus Reports of existing retailer requirements for Chelmsford City Centre (July 2014);
- Relevant policy documents;
- Discussions with key stakeholders; and
- Relevant planning applications and permissions.

5.5 The household surveys were undertaken by NEMS market research In November 2013 and Spring 2015. The original November 2013 survey covered 1,200 households across 12 survey zones. Following the decision to gather further information in relation to South Woodham Ferrers, a further survey was undertaken in March 2015 and covered 1,200 households across 10 separate survey zones. In part, the surveys covered an overlapping area and the composite survey area is shown on Plan 1. Zones 1-10 use data from the March 2015 survey whilst Zones 11-18 use data from the November 2013 survey.

5.6 The on-street surveys were also undertaken by NEMS. The first survey (December 2013) comprised 400 responses, 300 of which took place in Chelmsford and the remaining 100 took place in South Woodham Ferrers Town Centre. The second survey (May 2015) was focused upon South Woodham Ferrers and comprised 200 responses.

5.7 As with any data collection exercise where a sample is being drawn to represent a population, there will always be a potential difference between the response from the sample and the reality in the population as a whole. This is called the 'standard error.' Many steps have been undertaken by NEMS to minimise the standard error, including random sample selection and questionnaire construction. NEMS have confirmed that the results of the telephone survey are regarded as being sufficiently robust to allow analysis, with a 95% confidence internal of +/- 2.8%. The results of the on-street survey are sufficiently robust to allow analysis, with a 95% confidence internal of 4.9%.

Conclusions of 2005 Retail Study

5.8 Before assessing the current performance of Chelmsford City Centre, we briefly review the findings of the 2005 Retail Study on Chelmsford's health and capacity for future growth.

5.9 The 2005 study concluded that Chelmsford is a strong centre, performing well against key indicators. The city centre supported 100,518 sqm (gross) of ground floor floorspace for retail and service uses, across 479 units. The city centre had a below average representation of convenience units and an above average representation of comparison units. In particular, the study identified a particularly high proportion of footwear and clothing orders, reflecting Chelmsford's role as a higher order shopping centre in the sub-region.

5.10 The study identified 102 retail requirements in the centre by 2004, representing a steady increase in demand since 1998. Of these, 69 requirements were from comparison retailers, 9 from convenience and 20 from service operators. The most significant comparison requirements at the time were from House of Fraser, Zara and TJ Hughes. These requirements were unfulfilled and published interest has since extinguished, coinciding with the economic downturn.

5.11 Vacancies accounted for approximately 4.2% of total units, significantly below the national average of 10.3%. In terms of retail floorspace only 2.3% was vacant compared to the national average of 7.9%. The low vacancy rate and high number of retailer requirements recorded in 2005 reflect the strength of the centre but also emphasise the physical limitation for expansion. The principal patterns identified were the lack of suitable modern retail units to meet current / future demand and the limited opportunities for significant expansion within the traditional core of the centre.

5.12 With respect to pedestrian flows, the study found the highest concentration of pedestrian movements on the High Street and in High Chelmer Shopping Centre. The lowest pedestrian flows were found in the secondary retail areas, notably Duke Street, Baddow Road, Moulsham Street and New London Road. There were below average counts at Springfield Road, indicating under-utilisation of the waterfront area.

5.13 With respect to customer views, the majority of respondents to the 2005 household survey agreed that Chelmsford City Centre has a good range of upmarket brands, discount retailers, fashion retailers, non-fashion retailers and major retailers. While respondents identified a good range of major brands, they considered it was lacking in terms of smaller independent and specialist retailers.

5.14 In terms of capacity for convenience goods, the study concluded that there was capacity for the equivalent of at least one major new foodstore between 2004 and 2021. For comparison goods, the study identified capacity for circa 69,629 sqm (net) retail floorspace by 2021. The 2005 health check concluded that it was necessary to identify significant new retail opportunities creating additional retail space in order to attract major retailers to the centre. The following development opportunities were identified as having the potential to accommodate retail growth:

- High Chelmer Shopping Centre
- Land East of High Street
- Chelmer Waterside
- Riverside Frontages

5.15 The study concluded that the centre was healthy and vital. The principal problems identified were the lack of suitable modern retail units to meet current and future demand and the limited opportunities for significant new retail development within the traditional core of the city centre.

Location and Urban Form

5.16 Chelmsford stands at the confluence of two rivers, The Chelmer and The Can. The historic city centre is situated c. 30 miles north east of London in the commuter belt. It is close to the A12 dual carriageway which links Essex to the M25 and Greater London to the south and Colchester and Ipswich to the north. The city centre is well served by mainline rail services, including the London to East England rail corridor.

5.17 Chelmsford is the County town and performs an important retail and employment role in the sub-region. The centre also has an important administrative and civic role, and includes a university, a large general hospital, and headquarters of various public organisations including Essex County Council, the Crown Court and Essex Police.

5.18 The city centre is the main focus for retailing in Chelmsford. The main shopping area is compact and largely pedestrianised, with the High Street providing the main ‘spine route’ through the city centre. The city centre has two managed shopping centres. High Chelmer Shopping Centre and Meadows Shopping Centre located to the north west and south east of High Street (respectively).

5.19 At the southern end of the High Street, the urban from is shaped by the confluence of the rivers creating a distinct 'Y' shape. The western 'branch' is Moulsham Street, characterised by a mix of predominantly independent retailers and services. The southern half of Moulsham Street is linked to the city centre by a pedestrian underpass, which provides a crossing point under the Parkway dual-carriageway. Springfield Road, the eastern 'branch', links the High Street to Meadows Retail Park on the eastern side of the River Chelmer.

5.20 At the top end of the City Centre is the 'West End' which is located to the west of the train station. This area serves an important secondary shopping role, and accommodates a range of independent primarily retail and leisure services uses.

Diversity of Uses

5.21 Based on the latest survey undertaken by Experian Goad (January 2015), the city centre currently comprises 111,809 sqm gross retail and service floorspace across 519 units. This is an increase on the circa 101,000 sqm (gross) across 479 units recorded in the 2005 Retail Study.

5.22 Tables 5.1 and 5.2 below set out the diversity of retail and service units in Chelmsford centre compared to the national average. Table 5.1 shows data taken from Experian's January 2015 survey of the centre. Data from Experian's July 2013 survey is given in brackets. Table 5.2 provides floorspace data also taken from the Goad summary report.

Table 5.1: Chelmsford Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance
Convenience	34 (36)	6.55 (6.78)	9.14	-2.59
Comparison	211 (217)	40.66 (40.87)	40.16	+0.5
Service	214 (209)	41.23 (39.36)	37.25	+3.98
Vacant	54 (63)	10.40 (11.86)	12.29	-1.89
Misc.	6 (6)	1.16 (1.13)	1.16	-
Total	519 (531)	100 (100)	100	-

Source: Experian data January 2015 and July 2013. Figures may not sum due to rounding. UK averages from Goad.

Table 5.2: Chelmsford Composition of Uses (Floorspace sqm gross)

	Floorspace	% of Total	UK Average (%)	Variance
Convenience	14,288	12.78	18.26	-5.48
Comparison	56,131	50.20	45.21	+4.99
Service	30,612	27.38	25.13	+2.25
Vacant	9.968	8.92	10.39	-1.47
Misc.	808	0.72	1.02	-0.3
Total	111,809	100	100	-

Source: January 2015 Goad survey. Figures may not sum due to rounding. UK averages from Goad.

Comparison

5.23 As shown above, the amount of comparison units in the centre is very similar to the national average, although the amount of floorspace is above average (c. +5%), which reflects Chelmsford's role as a higher order retail centre in the sub-region.

5.24 Looking at the specific sub-categories of comparison goods[6], Chelmsford continues to have an above average representation of clothing and footwear units (which account for circa 11% of total units in the city centre compared to the national average of 10%). The strong fashion role of Chelmsford City Centre is reflected in the results of the on-street survey, in which 58% of respondents said that they intended to purchase clothing, footwear or accessories (the highest proportion of any goods mentioned by respondents). According to the Goad report, the city centre also has above average provision of electrical and home entertainment goods (which account for 5.2% units compared to the national average of 3.6%). Chelmsford does not lack in the provision of any comparison goods sub-categories when compared against the national average, apart from DIY, books/stationery, chemists/opticians and florists.

5.25 The majority of Chelmsford's comparison retail provision is located along the High Street and within High Chelmer Shopping Centre, the Meadows Shopping Centre, and Meadows Retail Park (colloquially referred to as 'Meadows 2'). The High Street is the primary focus of retailing activity in the city centre, connecting the city centre's two managed shopping centres, three department stores, and a wide mix and variety of other retail units and complementary services. Notable comparison retailers include H&M, Poundland, Next, WHSmith, Waterstones, Gap, Superdrug, Clintons and HM Samuel. The results of the on-street survey confirm that the High Street is the primary focus of retail activity in the centre, with 92% respondents whose main purpose for visiting Chelmsford was shopping confirming that they intended to visit the High Street (the highest proportion of any destinations mentioned).

5.26 At the northern end of the city centre is High Chelmer Shopping Centre. High Chelmer is a single-level covered shopping centre which opened in 1970. It has a floorspace of approximately 23,700 sqm (gross) across 82 units. The centre recently benefited from substantial refurbishment, which took place between 2007 and 2010. Works included the reconstruction and extension of various units to make way for two new flagship stores, one

[6] Sub-categories of comparison goods include: footwear and repairs; men's and boys' wear; women's, girls' and children's wear; mixed and general clothing; furniture, carpets and textiles; books, arts, crafts, stationers and copying; electrical, home entertainment, telephones and video; DIY, hardware and household goods; gifts, china, glass and leather goods; cars, motorcycles and accessories; chemists, toiletries and opticians; variety, department and catalogue showrooms; florists and gardens; sports, toys, cycles and hobbies; jewellers, clocks and repairs; charity, pets and other comparison.

of which is occupied by Primark. Other anchors include Boots and a Co-Op foodstore, and other operators include Superdry, New Look, Poundworld, Shoe Zone, Game, Bon Marche, Greggs, Holland and Barrett, River Island, Miss Selfridge, HMV, Topshop and Card Factory. According to the on-street survey results, High Chelmer is the second most popular retail destination in the city centre, with 72% of respondents stating that they intended to visit it. Entrances to the shopping centre are located off Market Road to the north, Corn Hill/West Square to the west, and Tindal Street/High Street/New London Road to the east. Immediately to the west of the shopping centre is the Chelmsford covered market and a circa 1,000 space multi-storey car park.

5.27 The Meadows Shopping Centre is the other managed shopping centre within Chelmsford. It is located at the southern end of the High Street, between Moulsham Street and the River Chelmer. It is a single-level covered centre with a retail floorspace of approximately 14,900 sqm (gross) across 40 units. The centre opened in 1992 and is therefore more modern in appearance than High Chelmer, however it is relatively constrained and this is reflected in the size and number of units. The centre has recently been refurbished, with new entrances and updated circulation space. The main anchors are BHS and Wilkinsons. Other retail operators include Fat Face, Boots, Warehouse, Punkyfish, the Perfume Shop, Card Factory, Evans, Ann Summers, and Superdrug. The results of the on-street survey indicate that the shopping centre also forms an important part of the retailing attraction of the centre, with 69% of respondents confirming that they intended to visit the Meadows for shopping. Access to the centre is from High Street to the west, Meadow Walk to the south and Backnang Square/Springfield Road to the north. A footbridge links the shopping centre to an eight screen Odeon Cinema and multi-storey car park on the other side of the River Can, which opened in 1993.

5.28 Moulsham Street is a unique collection of shops that extends from the southern end of the High Street, passing underneath Parkway via a pedestrian underpass. Shops and businesses in Moulsham Street offer a range of independent shops which provide original and specialist goods and services that are not available in the mainstream stores and help to enhance the overall diversity of the centre. The results of the on-street survey clearly indicate that the area serves an important complementary retail role to the rest of the city centre, with 28% of respondents shopping in Chelmsford mentioning it as an area they were intending to visit.

5.29 The Moulsham Street Traders Association plays an important role in fostering a sense of place and enhancing the unique character of this area. The MTA was originally established in 1973 and is comprised of the various businesses along Moulsham Street. The MTA actively promotes this location as a unique and distinct shopping area in the city centre through various events and campaigns. Most recently, the MTA organised an "Independents Day" which took place on the 5th July 2014. The MTA arranged for the pedestrianisation of Moulsham Street from Parkway to St. John's Church and organised a number of events throughout the day, including food and craft stalls, fairground rides, a choir, Punch and Judy Show, story trail, a bazaar, bouncy castle and ball pool.

5.30 In October 2011 Moulsham Street benefited from a major improvement scheme which included new pavements and narrower roads to reduce traffic speeds and improve the pedestrian environment.

5.31 Springfield Road links the High Street to Meadows Retail Park, which is on the eastern side of Chelmsford on the other side of the River Chelmer. Meadows Retail Park opened in 1995 and is comprised of four retail warehouse units of approximately 5,869 sqm (gross) retail floorspace. Current occupiers include Argos, Maplin, Blacks Outdoor Wear and Mothercare/Early Learning Centre. Other nearby units include Yates Wine Lodge, a new age gift shop and Games Workshop. The results of the on-street survey indicate that it is less popular than other parts of the city centre, with only 6.5% stating that they intended to visit it for shopping. This reflects its relatively limited offer. Parking is available in an adjacent 276 space pay & display surface car park, with access to the retail park via High Bridge Road.

5.32 Chelmsford has three department stores, all of which are located along the core High Street/Moulsham Street 'spine'. Debenhams and Marks and Spencer have three- and two-storey stores (respectively) on the High Street. When asked which stores respondents to the on-street survey intended to visit in Chelmsford, 48% mentioned Debenhams and 43% mentioned Marks and Spencer. These were the top-mentioned retail destinations in the city centre and highlight the importance that these stores play in maintaining the attractiveness of the centre. There is also a three-storey independent Quadrant Department Store just on the southern side of the Stonebridge over the River Can.

5.33 The comparison retail offer in Chelmsford is predominately tailored towards the mid/mass market. The higher end fashion offer is located along Baddow Road and comprises Hugo

Boss, Zagger Clothing and Now & Then Clothing. The relatively limited number of luxury/aspirational retailers in the centre is not necessarily unexpected given their tendency to seek representation in larger regional centres alongside a 'cluster' of similar operators.

5.34 The results of the on-street survey provide an indication of the relative popularity of various retailers in the centre. Table 5.4 below sets out the top 10 stores which were mentioned by respondents when asked what main stores they were intending to visit in Chelmsford.

Table 5.3: Top 10 frequented retail destinations in Chelmsford.

	Location	% Respondents who identified each store when asked what stores they were intending on visiting
Debenhams	High Street	48%
Marks & Spencer	High Street	43%
Boots	High Chelmer Shopping Centre	35%
Primark	High Chelmer Shopping Centre	30%
BHS	Meadows Shopping Centre	27%
Wilkinson	Meadows Shopping Centre	23%
Argos	Meadows Retail Park	18%
WHSmith	High Street	16%
Next	High Street	16%
Superdrug	High Street Meadows Shopping Centre	13%

Source: Chelmsford On-Street Survey, November 2013.

5.35 As shown, Debenhams and Marks & Spencer were mentioned by the highest number of respondents, a strong indication of the popularity and attraction generated by department stores in the area. This may provide an indication of the likely popularity of John Lewis when the store opens.

Convenience

5.36 Convenience goods provision in Chelmsford is below the national average, accounting for 6.6% of total units (compared to the national average of 9.1%) and 13% of total floorspace (compared to the national average of 18%). This is to be expected given the higher order retailing nature of the centre.

5.37 The main, large format, foodstore in Chelmsford is the Tesco at Springfield Road. The store is located at the eastern edge of the allocated Primary Shopping Area, adjacent to The Meadows Retail Park on the eastern side of the River Chelmer. Tesco comprises c. 3,032 sqm retail floorspace, of which c. 76% is used for the sale of convenience goods. The store includes a delicatessen, bakery, butchers, fishmongers, pharmacy and sells a limited clothing range. It has parking provision for circa 550 cars. In spring 2003 the store benefitted from a £6m refurbishment which included introduction of a meat, fish, coffee, bread and cheese counter, 'grab and go' food bar, and improvements to the car park.

5.38 The store is connected to the High Street via Springfield Road, a well-maintained and well-used pedestrian route linking the store to the rest of the city centre. The results of the household survey indicate that the store generates linked trips to other shops and services in the city centre. Of those who use the store for their main food shop, 37% went shopping for other food items elsewhere in the city centre on their last main food shop and approximately 19% also went shopping for non-food goods in the city centre[7]. The results indicate that the store serves an important main food and top up shopping role, acting as a retail anchor to the centre and creating linked trips to other shops and services.

5.39 Other multiple convenience operators in the city centre include Marks and Spencer (who have a circa 1,500 sqm (net) foodhall within their department store and a smaller 93 sqm (net) Simply Food on Duke Street), Iceland (who have a circa 654 sqm net store directly opposite Tesco on Springfield Road), the Co-Op (who have a 163 sqm net store in High Chelmer Shopping Centre) and Tesco Express (on Duke Street). In January 2014 Morrisons also opened an M Local store at the former Burger King unit just to the north of the Stonebridge at the southern end of the High Street.

[7] Data from 2013 household survey

5.40 There are also a number of smaller convenience stores dispersed throughout the city centre which help to contribute to its vitality and form an important role in supporting convenience provision within Chelmsford.

Service

5.41 The provision of service units within Chelmsford is slightly above the national average (c. +4%). Service units are sub-divided into three categories by Experian Goad; Retail, Leisure and Financial and Business Services. The amount of service floorspace is also slightly above the national average (c. +2%).

5.42 Provision of health and beauty retail services units in Chelmsford is slightly above the national average, accounting for 12.5% of total units compared to the national average of 9.9%. There is a high concentration of retail services in the secondary shopping frontages along Duke Street (in the 'West End') and Moulsham Street south of the Parkway, however there are also a number of retail services units dispersed throughout the primary shopping frontages (particularly nail bars and hairdressers).

5.43 Leisure services comprise restaurants, cafes, drinking establishments and hot food takeaways (Class A3-A5). According to Experian Goad, these uses account for 16.2% of total units, which is only slightly below the national average of 16.8%. This may indicate room for improvement, albeit when asked what would make respondents visit Chelmsford more often only c. 5% of respondents to the on-street survey mentioned better restaurants/pubs/bars. Chelmsford has a good representation of multiple restaurant occupiers, including Costa, Pizza Express, Café Rouge, Prezzo, Nando's, Pizza Hut, Starbucks, Zizzi, Giraffe and Prezzo. Leisure services tend to be clustered at the eastern and southern ends of the centre, alongside the River Chelmer and around the Odeon Cinema respectively. The 'West End' also features a concentration of take-away units.

5.44 Financial and professional service include Class A2 uses such as banks and estate agents. These uses account for 10.6% of total units in the centre, which is above the national average of 8.5%. The majority of these uses are located to the north of the centre, along Duke Street and Tindal Square. A number of banks are dispersed across the primary shopping frontage, with several operators occupying multiple units within the centre (i.e. Lloyds TSB).

Non-Retail

5.45 Chelmsford City Centre also includes a range of non-retail uses including the Essex County Cricket Club, the Odeon Cinema, the Riverside Leisure Centre and the Chelmsford Museum, to name a few. There are also natural features including a number of parks and the Rivers Can and Chelmer, which provide informal recreational opportunities. These facilities contribute to the diversity of the centre and help encourage activity and footfall throughout the day and evening.

5.46 The High Street, Springfield Street and much of the central riverside areas are also pedestrianised, which improves the amenity of the centre and provides for inclusive access and a pleasant visitor experience.

Change between 2013 and 2014

5.47 Generally there appears to have been a slight shift in land uses in the centre between the 2013 and 2014. There has been a small decrease in the number of convenience and comparison uses in the centre and this has been counter-balanced by a rise in the number of service uses.

5.48 This shift, whilst modest, may well indicate the continued pressure that high street retailing is experiencing, including competition from out of centre retail warehouses, supermarkets and on-line retailing.

Economic Activity

5.49 In order to provide an overview of economic activity across the centre, we now examine trends in vacancy rates, the concentration and location of retail uses, retailer demand, and existing and proposed investment in Chelmsford.

Vacancies

5.50 The proportion of vacant (street level) property is an important indicator of the relative vitality and viability of a city centre. However it should be used with caution, as vacancies can arise even in the strongest city centres, particularly where properties are under alteration. Conversely, the absence of any vacancies can be a symptom of under provision of space, often restricting new and existing retailers in the centre from securing new or enhanced representation.

5.51 Between 2005 and July 2013 the number of vacancies in the centre increased from 20 to 63. The 2015 survey data indicates that vacancies now stand at 54 units, which is 10.4% of all retail units in the centre. This is lower than the national average of 12.3% and shows an improvement over the past couple of years. The amount of vacant retail floorspace in the centre totals 8.9% of all retail floorspace. This is lower than the national average of 10.4%.

5.52 Figure 5.1 below shows the location of vacant property in the 2015 Experian survey. It should be noted that the plan below shows all vacant property at the time of the survey. This includes both retail and non-retail property and there may have been changes since the time of the survey.

Figure 5.1: Location of vacant units in Chelmsford City Centre (January 2015).

Source: Experian Goad. Crown Copyright 2007, License number PU100017316.

5.53 As shown, there do not appear to be any clusters of vacancies within the city centre, with most vacant units disbursed across the centre. The size of vacant units also varies, with the smallest unit 30 sqm (gross) and the largest circa 1,040 sqm (gross).

Retail Frontage

5.54 The Chelmsford Town Centre Area Action Plan (2008) currently designates the following land as Primary and Secondary Shopping Frontage:

Table 5.4: Chelmsford Primary and Secondary Shopping Frontage Designation

Location	Number
Primary Shopping Frontage	
Cornhill	Retail Market frontage / Return of 11 Market Road / 2 – 8 evens
Market Square	1 – 4
High Chelmer	24 – 43 / 1 - 23
Exchange Way	16 – 24 / 3 – 15
High Street	81 – 83 / 51 – 78 / 10 – 50
New London Road	2 – 22 evens / 1 – 11 odds
Barrack Street	Nightclub premises
Moulsham Street	220 – 226
The Meadows	1a – 19 / 21 – 34 / 35a – 37 / LSU 1, LSU 2
Springfield Road	24 – 48 / 50 – 70 evens / 18 – 22 evens / 47 – 55 odds / 5a – 7 odds
Annonay Walk	1 – 8
Secondary Shopping Frontage	
Broomfield Road	2 – 32 evens / 1 – 39 odds
Rainsford Road	2 – 12 evens
Duke Street	28 – 38 / 40 – 56 / 65 , 65a / 3 – 25 / Dorset House / 66 – 74 / 84 – 90
Wells Street	2 – 18 evens / 1 – 23 odds
Market Road	19 – 22 / Chancellor Hall / 1 – 10

Exchange Way	25 – 27 / 1 , 2
Tindal Square	6 / 1 – 5
Tindal Street	1 – 11 / Service Yard frontage
High Street	85 – 100 / 1 – 8 eastern frontage / 77 – 80
Waterloo Lane	North side from New St. corner to private entrance
New London Road	60 – 80 / 35 – 57
Moulsham Street	151 – 210 / 212 – 219 / 23 – 74 / 1 – 13
Parkway	8 – 18 evens
New Writtle Street	Moulsham Street junction to Tyre Centre / Moulsham Street junction to George Street
Can Bridge Way	1 – 7 plus Cinema
Springfield Road	13 – 41 odds / 72 – 80 evens / 96 – 102 evens / 135 – 151 odds
Bond Street	109 – 115
Riverside Retail Park	33 – 38
New street	Junction of Marconi Road to Rectory Lane (west side)
Rectory Lane	122 – 123
Bishop Hall Lane	1 – 15 odds

Source: Chelmsford Town Centre Area Action Plan (2008)

5.55 Policy DC59 of the Core Strategy and Development Control Policies Focused Review DPD (2008) states that within the primary frontages, retail activity will be the dominant use and other ground floor uses will be discouraged. Policy DC60 states that secondary frontages will support a greater diversity of uses, including specialist and independent retailers, cafes, bars and restaurants, community-related uses, financial and professional and other services. Moulsham Street, West End, Rivermead, Springfield Road and the Riverside Retail park are specifically identified as significant retail areas within the city centre, providing choice and variety.

Retailer Representation

5.56 According to the most recent data from Goad (January 2015), Chelmsford continues to be well-represented by mainstream multiple comparison goods retailers, with multiple accounting for 49% of all comparison goods units in the city centre. The centre benefits from a number of key anchors including Debenhams, Tesco and Marks & Spencer. The selection of non-food shops and the range of multiple retailers were some of the top characteristics that respondents to the on-street survey said they liked about Chelmsford, and were mentioned by 23% and 22% of respondents respectively. Multiple retailers are predominately located in the primary shopping frontages.

5.57 Peripheral retail locations such as Moulsham Street have a higher proportion of independent retailers, which helps diversify the retail experience and serves an important role in attracting visitors and maintaining the vibrancy of the area as a whole.

Retailer Demand

5.58 According to Co-Star Focus, there are 37 retailer requirements within Chelmsford City Centre (July 2014), which together need between 10,783 sqm and 19,329 sqm of floorspace in the town centre. This is higher than the 31 requirements we identified at the time of our first audit in November 2013, which together required between 4,527-10,005 sqm. The results indicate that the popularity of Chelmsford is continuing to increase as a desirous location for new retailers. Indeed, Chelmsford has one of the highest number of published requirements of any of the sub-regional centres assessed in Section 4 of this study, second only after Cambridge (see Table 4.2).

5.59 Although requirements are down from the 102 recorded in the 2005 Retail Study, this decline coincides with the economic downturn and a time when many retailers have put their expansion plans on hold. We consider that Chelmsford remains in a strong position compared to other sub-regional centres.

5.60 Table 5.5 below provides a summary of total published requirements.

Table 5.5: Chelmsford Retailer Requirements

	No. of Units	Min. Floorspace (sqm gross)	Max. Floorspace (sqm gross)
Convenience	4	4,465	7,259
rison	24	3,140	6,958
ervice	1	93	139
Service	5	2,202	2,751
al Service	1	1	37
(Class D2)	2	2,202	2,183
	37	10,783	19,329

Source: Co-star Focus (July 2014)

5.61 As shown, the majority of requirements are from comparison retailers. Upon closer examination, most requirements are from mid/mass market and luxury/aspirational retailers. Mid/mass market retailer requirements of note include; Warren Evans, JoJo Maman Bebe and Ecco and American Golf. High end luxury retailers which have requirements for representation in Chelmsford City Centre include L'Occitane, Phase Eight, Rituals, Farrow & Ball and Joules Clothing Ltd and Champneys luxury spas. A full list is included in Appendix 3.

5.62 The latest Co-Star Focus Report identifies interest from four convenience operators: Aldi, Lituanica (an eastern European supermarket), and two smaller speciality shops. We also understand that there is unpublished interest in additional representation in the Chelmsford area from Sainsbury's, Asda and Morrisons.

5.63 The Focus database also identifies:

- five retailer requirements from leisure service operators including two takeaway units, two coffee shop chains and one restaurant operator;
- two requirements for leisure (Class D2) operators, one from NRG Gym and the other from David Lloyd Leisure, and one requirement for a luxury spa (Class D1); and

- one requirement each for financial services (a money exchange) and retail services (a hair salon).

5.64 Some requirements are for larger format units which are not currently available in the city centre, however there are a number of vacant units which could physically accommodate some of the outstanding floorspace requirements, indicating that these units may not meet other retailer demands due to other factors such as location or format.

Out of Centre Retailing

5.65 Chelmsford is well served by several out-of-centre retail facilities. The main comparison good destinations in the Chelmsford area are listed below:

- Army & Navy – is located to the southeast of the city centre, at the Parkway and A1114 roundabout. It is comprised of six units totalling 2,378 sqm (net) floorspace. Operators include Chiquito, Frankie & Bennys, Evans Cycles and Travelodge. There is some vacant floorspace in the northern part of the commercial floorspace.
- Chelmer Village Retail Park – is located approximately 1.5 miles to the east of Chelmsford City Centre via Chelmer Village Way, just off the A138. It is the largest retail park in Chelmsford and includes 15,892 sqm (net) retail floorspace across 16 units. Occupiers include Curry's / PC World, Wren Kitchens, Hobbycraft, Costa Coffee, Outfit, Boots, Next, JD Sports, TK Maxx, Argos, Pets at Home, Halfords, Harveys Furniture, Carpetright and Pizza Hut. The results of the household survey show that it is the most popular out-of-centre retail destination in Chelmsford, accounting for 6.6% of total comparison goods expenditure in the survey area and 17.7% of comparison goods expenditure within Chelmsford's core zones.
- Homelands Retail Park – is located on Cuton Hall Lane, on the outskirts of Springfield approximately 2.5 miles northeast of Chelmsford City Centre. Despite the name, Homelands is limited to a single large B&Q Warehouse and Garden Centre with a floorspace of 9,339 sqm (net). The results of the household survey show that this store is the second most popular out-of-centre retail destination in Chelmsford, accounting for 1.7% of comparison goods expenditure within the study area and 4.4% within Chelmsford's core zones.
- Riverside Retail Park – is located north of Chelmsford City Centre and accessed via Victoria Road, the A1099 city centre ring road. It is the second largest out of centre

destination in Chelmsford and includes 13,388 sqm (net) floorspace across 12 units. Operators include Staples, Sports Direct, Brantano, Dreams, Lewis's, Matalan, Home Bargains, Nuffield Health Fitness & Wellbeing, McDonalds Drive Thru, and Cycles UK. The retail park is less popular than other out-of-centre destinations, accounting for only 0.6% of comparison expenditure within the wider survey area and only 18% within Chelmsford's core zones.

5.66 There are also a number of standalone retail units within Chelmsford, including:

- Wickes at Cuton Lane (2,728 sqm (net) floorspace).
- Homebase (incl. Garden Centre) at Barnes Place (3,290 sqm (net) floorspace).
- The former Tesco Home Plus at Parkway (5,574 sqm (net) floorspace) which will soon be re-occupied by B&M.

5.67 Together, these units account for a relatively limited proportion of comparison goods expenditure, both within the survey area (0.7%) and within Chelmsford's core zones (1.6%).

5.68 The Chelmsford urban area has two main out of centre foodstores: Tesco on Princes Road and Sainsbury's in Springfield. The Tesco on Princes Road is located to the south of Chelmsford City Centre close to the A114 Princes Road/London Road roundabout junction. The foodstore opened in 1993 and has a floorspace of approximately 4,667 sqm (net), of which approximately 76% is used for the sale of convenience goods. The store is open 24 hours and has a comprehensive food offer including a bakery, butcher, fish monger and a hot deli counter. Additional facilities include a pharmacy, café/restaurant, petrol filling station, and travel money bureau. The store also sells a limited range of non-food goods including clothing and electrical goods.

5.69 Sainsbury's in Springfield is located to the north east of Chelmsford City Centre, just beyond the B&Q at Homelands Retail Park. It benefits from good accessibility on the main road network via the A130 White Hart Lane/Colchester roundabout junction. The store opened in 1991 and has a floorspace of approximately 6,620 sqm (net). Of this, approximately 80% is used for the sale of convenience goods. The store has a comprehensive food offer, including a bakery, fresh salad bar, fish mongers, hot deli and meat counter. It also has a relatively strong non-food retail offer, including toys, homewares, small domestic appliances, kidswear and jewellery. Additional facilities include a restaurant, pharmacy, petrol filling station and hand car wash.

5.70 Additional smaller scale out of centre foodstores in the area include an Aldi on Springfield Road and a Lidl and Farmfoods on Princes Road.

Investment

5.71 There is major investment planned for public realm improvements in the city centre, and regeneration of some key city centre sites is well underway.

5.72 The Council is investing in a long term programme to improve the whole of the High Street, and have identified five key spaces: Tindal Square, Old Market, Half Moon Square, Middle High Street and Stone Bridge Place. Outline proposals are included in 'Transforming Chelmsford High Street' with the intent to, *inter alia*:

- draw out the distinctive character of each 'place';
- provide clear connections between all key retail destinations and public spaces;
- repair the connection between High Street and Cathedral;
- intensify pedestrian flows to Moulsham Street;
- install a continuous high quality paved surface and make spaces unobstructed and accessible for all; and
- improve the setting for events and spectacles and extend the attractiveness of the centre through the evening.

5.73 Development contributions are secured to improve Half Moon Square on the High Street, to be implemented in 2015. This will include improvements to the paved surfaces and removal of street clutter with new street furniture and wayfinding.

5.74 One important public realm improvement project currently underway is at Chelmsford railway station. The Council led Station Square project will upgrade surfaces, street furniture and introduce new wayfinding. It is due to be completed later in 2015. Greater Anglia and Network Rail are also investing in Chelmsford station at the present time to vastly improve its facilities. Together this work will give a fantastic arrival experience to Chelmsford.

5.75 Chelmsford Flood Alleviation Scheme will be constructed in 2016/2016. The scheme will provide increased flood protection to the city centre, and have the likely effect of increasing investor confidence.

5.76 With respect to retail development, High Chelmer received permission for an extension to the western end of the shopping centre to provide additional units and Meadows Shopping have completed an upgrade to their main entrances.. The city will also benefit from significant new investment through redevelopment of Land East of the High Street, which is being promoted by Aquila for significant new retail floorspace including a new John Lewis department store.

5.77 The Council also has a particularly active events programme focused on the city centre, including the CITYdiversions Festival which takes place in the city centre in September and includes a wide range of events, activities and performances. The Council supports Changing Chelmsford who also have an active events programme across the city.

Development Sites

5.78 The CTCAAP (2008) sets out 37 site opportunities within Chelmsford. Sites which are specifically identified as having potential for retail development have been described in Section 2, and include:

- High Chelmer Shopping Centre (Site 1)
- Land East of High Street (Site 3)
- Tesco and adjoining land (Site 4)
- Meadows Shopping Centre and car park, former gas works and adjoining land (Site 5)
- Former Jewsons, Tesco Home Store and Moulsham Hill (Site 25)
- Riverside Retail Park (Site 30)

5.79 Land East of the High Street received full planning permission for significant new retail and leisure development including a new major comparison anchor of 10,957 sqm (GIA) to be occupied by John Lewis, up to c.17,000 sqm (GIA) of additional comparison retail floorspace across 25 shops, four new restaurants and a new cinema (ref: 12/01058/FUL). The ‘Bond Street redevelopment’ (as it is also referred to), is being promoted by Aquila Holdings and represents a circa £64m investment in the city centre. Recently, it was announced that Cineworld signed a pre-letting agreement to occupy the site. Other committed occupiers include Byron, Ask and Coast-to-Coast American Restaurant & Bar. The development is now under construction.

5.80 Chelmer Waterside is the largest brownfield development area and is located to the southeast of the city centre. It is identified in the CTCAAP (2008) for comparison and convenience goods shopping, as well as eating and drinking, leisure and residential uses. We understand that there has been retailer interest in redevelopment. Section 9 considers the potential for Chelmer Waterside to contribute to meeting retail needs in the City Council Area and the potential economic impact that redevelopment of this site for convenience goods could have on wider development aspirations for Chelmsford.

Accessibility and Footfall

Accessibility

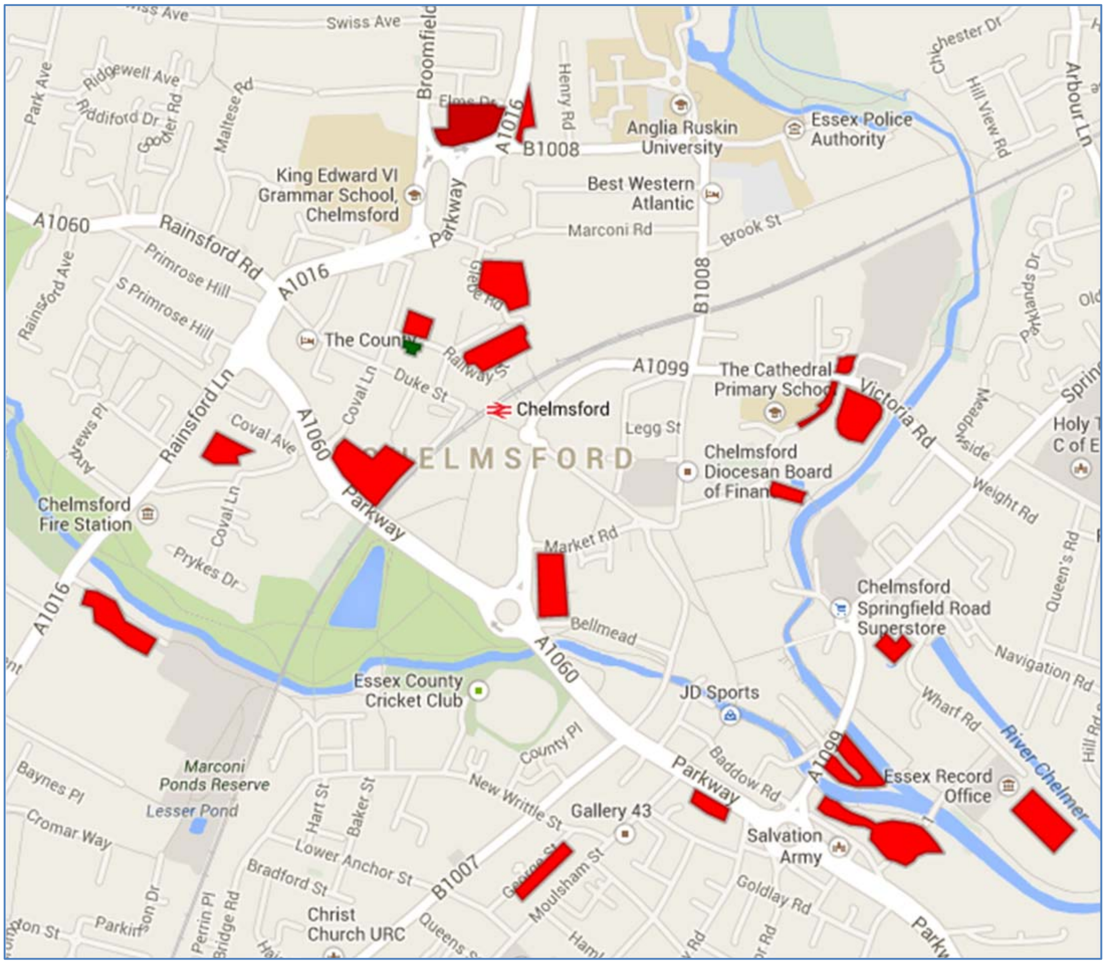
5.81 Chelmsford City Centre has excellent access to the main road network. It is situated close to the A12 dual carriageway which links Essex to the M25 and Greater London and leads to Colchester and Ipswich to the north. There is good road access from the city centre to the wider urban area and rural catchment beyond.

5.82 Chelmsford is also well-connected by rail, with regular, direct services to London Liverpool Street taking approximately 35 minutes. There are also train services to Norwich, Colchester, Braintree, Ipswich and various smaller towns and settlements in between. Chelmsford's train station is on Duke Street, a short walk from the main shopping area.

5.83 Bus services in Chelmsford are reliable and radiate from the city centre to the wider urban area. There are several bus routes to destinations farther afield such as Braintree, Southend-on-Sea, Stansted Airport, Colchester, Basildon, Maldon and Brentwood.

There are 19 Council-operated car parks with Chelmsford City Centre which are disbursed across the centre (see Figure 5.2 below). The majority of these are Pay & Display and are open 24 hours a day, seven days a week. A number of car parks within the city centre have Variable Message Signage on approach roads, indicating how many spaces are available. In addition to the Council-operated car parks there are a further 8 facilities operated by private companies.

Figure 5.2: Chelmsford City Centre Car Parking Facilities



Source: Chelmsford City Council (November 2013).

5.84 Table 5.6 below shows the popularity of various travel modes to Chelmsford City Centre based on the results of the household and on-street survey.

Table 5.6: Travel Modes to Chelmsford City Centre, Winter 2013

	Household Survey (% respondents)	On-Street Survey (% respondents)
Car (driver)	66%	44%
Bus	13%	20%
Car (passenger)	8%	13%
Park & Ride	7%	6%
Walk	2%	11%
Train	1%	3%
Other	4%	2%

Source: GVA Household Survey (December 2013) and On-Street Survey (November 2013). Numbers may not sum due to rounding.

5.85 As shown, the most popular method of travel to Chelmsford is by car. According to the result of the on-street survey, 132 respondents travelled to Chelmsford city centre by car as a driver, and 38 arrived as a passenger (together representing 57% of all respondents). When asked where they parked, 21.2% of drivers did not know. The most popular locations mentioned by drivers were Meadows Retail Park (21.2%), High Chelmer (10.6%), Meadows surface car park (9.9%), and Riverside Victoria Road (7.7%).

5.86 Of those who visited the Chelmsford City Centre as a driver, 48.5% said that there was nothing that they disliked about the centre. The other responses mentioned by drivers were that car parking was "too expensive" (19.7%) and there were "not enough spaces" (14.4%). Similarly, when asked what would make respondents who drove to the centre visit more often, around 45% said "nothing in particular". Other responses included "more/better car parking" (16.7%) and "cheaper parking" (14.4%). We investigate these responses in further detail below.

5.87 In the first instance, it is important to remember that the survey was undertaken in November at the beginning of the Christmas shopping season. As this is normally one of the busiest periods for centres, it is not unexpected that the centre's car parks would also be busy. Indeed, the on-street survey results show that of all respondents who drove to the centre, 34% said that they did so for Christmas shopping (the second most frequent response, after non-food shopping). During our audit of the city centre in November 2013 we found that the car parks were indeed busy, however this is no doubt linked to the time of year that the audit took place. During our update to the town centre audit in July 2014, car parks were generally between c 60% and 95% full depending on location. There were no queues or any instances of cars parked outside of designated spaces. The car parks were therefore well-used, however we did not identify any particular symptoms which would suggest that there were a lack of spaces or issues with overall capacity to accommodate visitors who choose to visit by car.

5.88 With respect to pricing for the City Centre car parks, we have undertaken a comparison of Chelmsford with other facilities in the sub-region. The results are shown in Table 5.7.

Table 5.7: Comparison of Pricing for Town Centre Car Parks, 2014

	1hr (£)		2hr (£)		3hr (£)		4hr (£)	
	Min	Max	Min	Max	Min	Max	Min	Max
Chelmsford	1.00	2.00	1.50	2.50	2.00	3.50	3.50	4.70
Cambridge	1.40	2.20	2.50	4.50	4.00	6.80	6.50	19.00
Colchester	1.50	2.30	1.00	3.90	2.00	3.30	1.50	4.10
Braintree	0.70	0.70	-	-	1.50	-	-	-
Brentwood	-	1.30	2.90	2.90	3.60	3.60	4.40	4.40
Ipswich	0.70	1.00	1.50	2.00	2.00	3.00	2.80	4.00

Source: Chelmsford City Council, GVA, 2014

5.89 As demonstrated above, prices vary in each centre depending upon the location of the car park and the length of time spent in each facility. Costs for one hour of car parking in Chelmsford are lower than some places (Cambridge and Colchester), but higher than for others (Braintree and Ipswich). For 2 or more hours of car parking, Chelmsford is consistently at the middle to lower end of the cost spectrum when compared to other sub-regional centres. As a result, we consider that Chelmsford's pricing schedule remains competitive.

5.90 With regards to other services, the surveys confirm that bus services appear to be well-used and are the second most popular method of travel. There are also two park and ride facilities located outside of Chelmsford City Centre at Sandon and Chelmer Valley, which also appear to be reasonably well used.

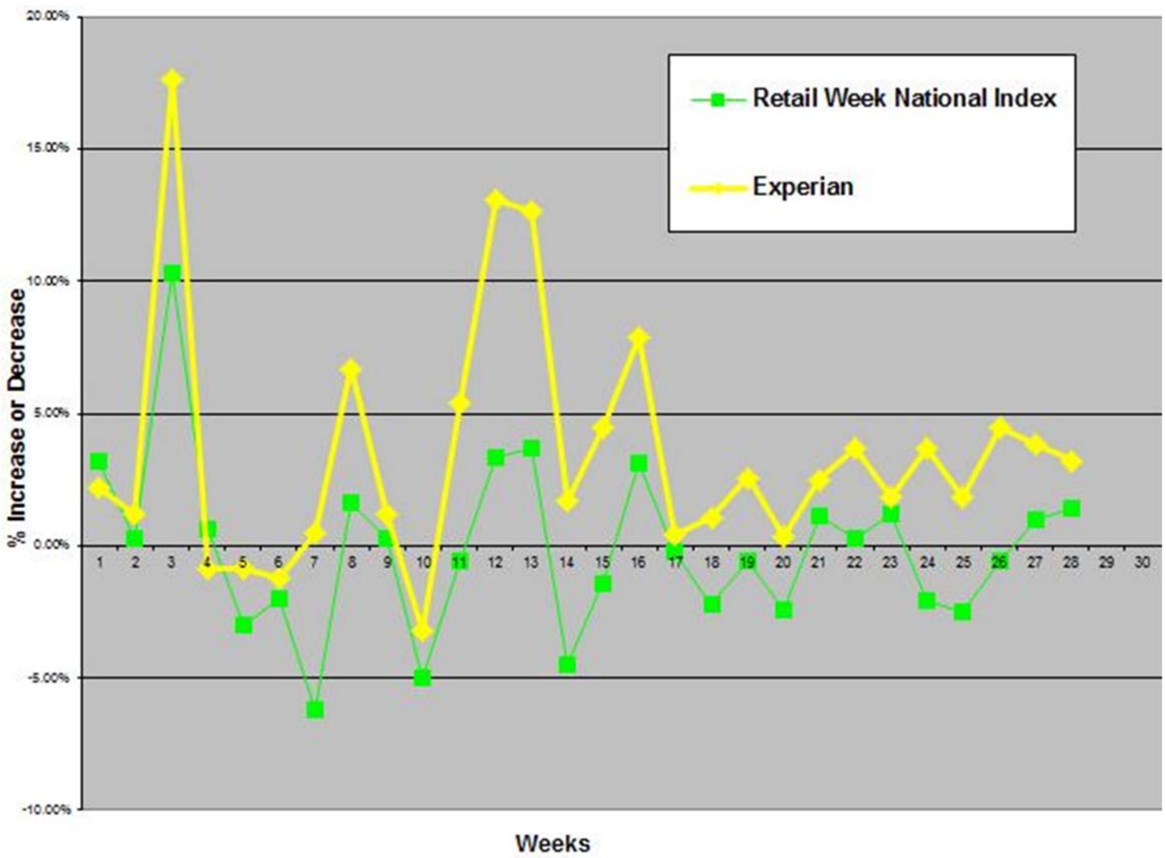
Footfall

5.91 In July 2014, GVA commissioned PMRS to undertake pedestrian footfall counts across Chelmsford city centre. 45 locations were surveyed and the detailed results can be found at Appendix 4 to this report (along with a plan of the survey locations).

5.92 The results show that the busiest locations were around the Higher Chelmer Shopping Centre, High Street, Moulsham Street and Springfield Road. The highest footfall locations on both Friday and Saturday were on High Street around Marks & Spencer, then Barclays Bank, Fraser Hart and Monsoon. The data at Appendix 4 shows that footfall on Saturday was unsurprisingly higher than Friday.

5.93 Regular footfall counts are also undertaken at High Chelmer Shopping Centre. Figure 5.3 below demonstrates the results of Experian Counts of footfall from the three main entrances for the first 29 weeks of 2014 compared to the national benchmark. We note that the results will not take into account activity at the secondary exits/entrances within Primark and Boots the Chemist and will therefore provide a somewhat conservative view of true footfall in the centre.

Figure 5.3: Experian Footfall Counts at High Chelmer Shopping Centre, 2014 (Weeks 1-28)



Source: High Chelmer Shopping Centre.

5.94 As shown above, recorded footfall in High Chelmer in 2014 has been consistently above the national average. This will no doubt be in part linked to the opening of several new retailers, including Primark, Superdry and CeX entertainment exchange.

Consumer and Business Satisfaction

5.95 We have drawn from the results of the on-street survey and household survey to get an indication of consumer satisfaction within Chelmsford City Centre.

5.96 Despite the fact that the study area covers an area wider than the City Council Area boundary, only 25.5% of respondents said that they never visited Chelmsford City Centre, demonstrating the wide extent of Chelmsford's geographic pulling power. Of those who do visit the centre, the highest proportion (69.3%) did so in non-food shopping. The second most frequent use was for daytime eating (39.9%), followed by food shopping (32%) and evening eating (31%).

5.97 The tables below list the top ten characteristics respondents to the household survey most 'liked' (Table 5.8) and disliked' (Table 5.9) about Chelmsford City Centre. In the wider survey area covered by the household survey, four of the top ten responses related to the scale and mix of retail facilities in the city centre. Three of the top ten responses related to the environment in the centre, highlighting the importance that this plays in visitors' experience in the city centre.

Table 5.8: Top 10 characteristics 'liked' about Chelmsford, 2014

Category	Response	Household survey
Retail	Good range of chain/well known stores	33%
Accessibility	Close to home	25%
Retail	Good selection of non-food shops	23%
Retail	Good range of independent stores	18%
-	Nothing/very little	14%
Environment	Pedestrianised streets	8.5%
Environment	Attractive environment	8%
Environment	Compact shopping environment	6%
Retail	Good mix of indoor/outdoor shopping	5%
Accessibility	Close to work	4%
Accessibility	Easy to park	3%

Source: Chelmsford Household Survey (December 2013).

5.98 The results of the on-street survey provide another layer of evidence about consumer satisfaction with Chelmsford. Five out of the top ten characteristics most liked by visitors to Chelmsford related to retail, and included the range of non-food shops (23%), multiples (33%), food shops (9%), the mix of indoor/outdoor shopping areas (5%) and Chelmsford's markets (7%). Three of the top ten characteristics related to environmental quality, and the most liked characteristic was the range of multiple retailers (33%).

5.99 Table 5.9 sets out the most frequent characteristics 'disliked' about Chelmsford according to the results of the household survey.

Table 5.9: Top 5 characteristics 'disliked' about Chelmsford, 2014

Category	Response	Household survey
-	Nothing/very little	61%
Accessibility	Difficult to park	11.5%
Accessibility	Expensive parking	9%
Accessibility	Traffic congestion	4.5%
Environment	Too busy	3%

Source: Chelmsford Household Survey (December 2013).

5.100 As shown above, around 61% of all respondents to the household survey said that there was 'nothing/very little' that they disliked about the centre, which is further evidence of a high level of satisfaction. The top-mentioned dislikes related to the perceived lack of adequate and affordable car parking in the centre. Looking more closely at the household survey results, of the 103 respondents (or 11.5% of total respondents) who said it was difficult to park, 86 (or 83%) said that they normally travelled to Chelmsford City Centre by car. As discussed earlier in paragraph 5.86, it may be that the results are in some way influenced by the survey taking place during the busy Christmas period.

Summary

- Overall, our health check indicates that Chelmsford remains a strong centre which performs well against the national average in key indicators.
- Chelmsford has a good representation of comparison goods floorspace, reflecting its role as a higher order shopping centre in the sub-regional area. The addition of John Lewis will help ensure that the city centre maintains market shares and continues to attract trade and investment.
- The Tesco on Springfield Road, provides an important complementary role to the city centre and helps encourage linked trips to other shops and services. However, the overall number of convenience units in the centre is below the national average. We therefore consider that there may be a qualitative case to support additional foodstore provision in the city centre in order that the centre's market share can rise and compete better against out of centre locations in the city.

- Leisure service provision in the centre is slightly below the national average, which may indicate room for improvement. The proportion of leisure services units in the centre has, however, increased in the last 12 months. The relatively recent provision of leisure units on Springfield Road and beside the River Chelmer, and the planned expansion of these uses at the Bond Street development, ensures that this is a high quality offer.
- Vacancies can arise even in the strongest city centres and the absence of any vacancies can be a symptom of under provision of space, often restricting new and existing retailers in the centre from securing new or enhanced representation. The study has found that vacancies in the city centre are now below the national average, and have decreased between 2013 and 2015. The vacancies are disbursed across the centre, indicating there are no particular 'clusters' of the city centre which are suffering inactivity.
- There is a high number of published requirements for retailer representation in Chelmsford, particularly when compared to other competing sub-regional centres which confirms that the centre continues to grow in its attractiveness as a retail destination in the sub-region. We also understand there is additional unpublished interest from a number of main foodstore operators. The number of vacant units in the centre compared to the number of outstanding published requirements indicates that modern multiple retailer requirements may be unfulfilled by the location, size or other characteristics of vacant units. On this basis, we consider that there may be an opportunity for independent retailers to enter the High Street, albeit this would be dependent upon market interest and viability.
- Redevelopment of Land East of the High Street will deliver a significant scale of new retail floorspace in the city centre, introduce a new John Lewis department store, and play an important part in regenerating this part of the city centre. It is important that this redevelopment is complemented by public realm improvements to help enhance connectivity, engender a sense of place in the city centre and foster linked trips to other parts of the city centre.

6. Qualitative Assessment - South Woodham Ferrers Town Centre

6.1 The following section considers the role and health of South Woodham Ferrers Town Centre, following the same methodology applied for Chelmsford City Centre. It is principally informed by, *inter alia*:

- The most recent Experian Goad Category Report for South Woodham Ferrers Town Centre (June 2014), updated by GVA in September 2014;
- Our own audits of the centre, undertaken in November-December 2013, July 2014 and September 2014;
- The results of bespoke household telephone surveys (December 2013 and March 2015) and on-street visitor surveys (November 2013 and May 2015), all undertaken by NEMS;
- Relevant policy documents;
- Co-Star *Focus Report* of existing retailer requirements (July 2014); and
- Relevant planning applications and permissions.

Location and Urban Form

6.2 South Woodham Ferrers Town Centre town centre is located approximately 13 miles south east of Chelmsford City Centre. It is a purpose-built centre which was developed largely in the late 1970s. The defining characteristic is the large Asda foodstore anchor, which also maintains the town's main car park.

6.3 We understand Asda (Wal-Mart) owns the core of the town centre, including the car park areas and some public spaces. We also understand that they control the letting of one third of all town centre business premises. SW Investments owns the freehold of the remainder of the shops and Market Square. William de Ferrers School owns the northern area occupied by the school, library and public facilities.

6.4 South Woodham Ferrers Town Centre is located in a predominantly residential area and is in close proximity to the main road network. It is defined as a Town Centre in the Core

Strategy, below Chelmsford but above the City Council Area's Principal Neighbourhood Centres. It attracts residents from a relatively limited geographic catchment area, with 69% of respondents to the on-street survey indicating it took them less than 10 minutes to travel to the centre.

Diversity of Uses

6.5 Based on the latest survey undertaken by Experian Goad (June 2014), the town centre comprises 15,060 sqm gross retail and service floorspace across 88 units.

6.6 To ensure the health check assesses up-to-date data, GVA has undertaken an updated land use survey in September 2014. The results of that survey, alongside a 2012 Experian survey of the town centre, are recorded in Table 6.1 below.

Table 6.1: South Woodham Ferrers Town Centre Composition of Uses (Units)

	2012	2014			
	No. of units	No. of units	% of Total	UK Average (%)	Variance
Convenience	5	5	5.81	8.80	-2.99
Comparison	24	24	27.91	40.95	-13.04
Service	50	50	58.14	36.46	+21.68
Vacant	6	7	8.14	12.63	+4.49
Misc.	0	0	0	1.15	-1.15
Total	85	86	100	100	-

Source: Experian Goad Summary Report (May 2012), updated by GVA Audit (2014).

Comparison

6.7 The health check shows that there is a lower than average proportion of comparison units in the centre when against the national average. Although it is not unusual for a centre of this size to have a lower than average representation of comparison facilities, the level of variance is such that it could indicate a qualitative need to improve comparison shopping facilities.

6.8 The largest comparison retailer in the centre is George Clothing, a subsidiary of Asda and a product range which is typically found within Asda stores. As the only major comparison shop in the town centre, it is clear that George benefits from its association with Asda, who we understand are themselves the principal landowner in the town centre. The centre has no national multiple comparison goods retailers, although there are a small number of independent comparison businesses who occupy smaller units.

6.9 The relatively weak comparison goods offer in the centre is reflected in the results of the 2015 household survey, which show that the centre accounts for 9.7% of comparison expenditure in Zone 1 (the zone in which South Woodham Ferrers lies). The results of the on-street survey in South Woodham Ferrers Town Centre also point towards a qualitative deficiency in comparison provision. When asked what they disliked about South Woodham Ferrers Town Centre, 12% of in-street survey respondents said there was a poor selection of non-food shops.

Convenience

6.10 Convenience provision in South Woodham Ferrers Town Centre is dominated by the Asda, a circa 4,073 sqm (net) store of which approximately 70% is used for the sale of convenience goods. The store provides a comprehensive range of facilities including a bakery, deli and hot food counter. It also provides an extensive non-food range which includes: clothing, books, stationary, multimedia and electrical items as well as the ability to click and collect online purchases from a wider range of products. The trading performance of the Asda store is discussed later in this report.

6.11 The 2015 household survey indicates that the Asda store attracts a 57% market share for convenience goods shopping in Zone 1, with further main food expenditure drawn from Zones 4, 6, 9 and 10. In addition, the on-street survey commissioned for this survey reveals that the town centre draws trade from outside of the household survey area, amounting to 9% of total store visits.

6.12 The 2015 on-street survey verifies the town centre's reliance on Asda, with 89% of respondents stating that it was one of the main stores they intended to visit. The next top-mentioned destination was the George store (23%). Food shopping is clearly an important function of the centre, with 34% of visitors stating it was the main purpose of their visit to

South Woodham Ferrers Town Centre. Other popular activities included 'non-food shopping' (15%), financial services (17%), personal services (5%) and browsing (3%).

6.13 There is also evidence of linkages between food shopping in the town centre (at the ASDA store) and other uses in the centre. This shows that not only is the ASDA store playing an anchor role in the town centre but that shopping trips to the store are linking (and benefitting) other uses in the centre. Therefore, we consider that any loss of trade from this store has the potential to have knock-on impacts upon the remainder of the town centre.

6.14 The centre's convenience offer is supplemented by other small units which include: a butchers and a convenience store. All of these convenience uses are located within the secondary retail frontage and serve an important, albeit relatively limited, role in providing a diversity of convenience uses within the centre.

Service

6.15 Service provision within South Woodham Ferrers Town Centre is strong, with the proportion of service floorspace and number of units well above the national average. There is also good balance between retail, leisure and financial/business service units in the centre. In particular, the centre has a reasonable mix of hairdressers/barbers, health and beauty, property services and hot food takeaways. The high concentration of service uses within the centre means they are dispersed throughout the secondary shopping frontages, particularly to the west of the centre.

Economic Activity

6.16 In order to provide an overview of economic activity across the centre, we now examine trends in vacancy rates, the concentration and location of retail uses, retailer demand, and existing and proposed investment in South Woodham Ferrers Town Centre.

Vacancies

6.17 According to the Goad Category report (May 2012), there were 6 vacant units in South Woodham Ferrers Town Centre, equivalent to circa 7% of retail units in the town centre. Since 2012, vacancies have risen to 7 units, which is equivalent to 8.1% of all units. This remains below the current national average of 12.6%.

Retailer Representation

6.18 According to the Goad Category report (May 2012), there are 18 multiple retailers in South Woodham Ferrers Town Centre, equating to 18.6% of total town centre units.

6.19 Our survey in July 2014 identified a decline in the number of national multiple retailers represented in the centre since 2012. Multiples now take up 13 units in the centre (15.5%) and include: Asda, Barclay's Bank, Natwest Bank, Santander Bank, McDonalds, Costa Coffee, Ladbrokes and Thomas Cook Travel Agents. Although a higher proportion of independent retailers is to be expected given the centre's role and function within the retail hierarchy, the decline in multiple units may signify a vulnerability in the centre.

Retailer Demand

6.20 According to the Co-Star Focus (July 2014), there is one requirement for representation in South Woodham Ferrers Town Centre. This is by Card Factory, who requires a unit of between 93 and 232 sqm.

6.21 We understand that past attempts to attract national multiple retailers to the town centre have been unsuccessful, which may be due to the town's relatively limited catchment area.

Out of Centre Retailing

6.22 There are no major out of centre retail parks or standalone retail parks within the vicinity of South Woodham Ferrers Town Centre. The nearest out-of-centre retail destinations are around the nearby towns of Chelmsford, and also Basildon, Rayleigh and Southend-on-Sea which are all outside the City Council Area.

Investment

6.23 A Plan for South Woodham Ferrers Town Centre SPD was adopted in 2008 as part of the Local Development Framework and sets out guidance, suggests improvements and seeks to assist public and private interests in working to together to improve the town, with a focus on town centre regeneration. We are not aware of any planned public or private investment in the centre.

Development Sites

6.24 The Plan for South Woodham Ferrers Supplementary Planning Document[8] identifies a number of potential development sites in and around the town centre. These are:

- Knight Street
- Baron Road / Inchbonnie Road
- The emergency services site

Accessibility and Footfall

Accessibility

6.25 South Woodham Ferrers Town Centre is easily accessible by private vehicle being within 3 miles of the A130, 7 miles of the A127 and 9 miles from Junction 17 of the A12. The town is well connected with other town centres being 9 miles from Basildon, 13 miles from Chelmsford and 15 miles from Southend-on-Sea.

6.26 Bus stops are located on Inchbonnie Road and Merchant Street and provide twice hourly services to the local area and Chelmsford City Centre, in addition to less frequent services to the neighbouring villages and Basildon Hospital. South Woodham Ferrers Town Centre rail station is 1km north-west of the centre and provides twice hourly services to London Liverpool Street.

6.27 There are four car parks in the centre, all which provide free car parking. The main car park in the centre is the Asda car park, which is free for all to use regardless of whether it is combined with a trip to the store. At the time of our audit the Asda car park was at approximately 80-90% capacity, and with the three other smaller car parks at capacity. According to the 2015 on-street survey 69% of respondents travelled to the centre by car (62% as a driver and 7% as a passenger).

[8] Adopted in June 2008

6.28 The centre is also accessible via foot from the neighbouring residential areas, and benefits from this walk-in catchment. The results of the 2015 on-street survey showed that 26% of respondents travelled to the centre on-foot.

6.29 The centre is served by South Woodham Ferrers Town Centre train station, located approximately 1km north-west of the town centre, and a bus service linking the station, town centre and Asda Store.

Footfall

6.30 At the time of GVA audit of the centre in July 2014, the greatest concentration of footfall in the centre was around the two entrances to the Asda foodstore. Footfall greatly declined around the secondary frontage and car park around Brickfields Road.

Environmental Quality

6.31 The environmental quality is mixed and can appear dated in some areas. Many of the public spaces and streets in the centre are privately owned and maintained, creating inconsistency in maintenance levels and methods and a lack of clarity on responsibilities between the street environment (including surfacing and street furniture).

Customer Views and Behaviour

6.32 One of the key issues brought out during the production of the A Plan for South Woodham Ferrers Town Centre SPD (2008) was the desire to see the role of the town centre accommodate a greater mix of uses (including leisure) to increase activities during the daytime and evening. To an extent, this was echoed by the respondents to the 2015 on-street survey, with 11% of the respondents stating that they would visit the centre more often in the evenings if there were more leisure facilities.

6.33 Table 6.3 below lists the top five ‘likes’ and ‘dislikes’ identified by respondents to the 2015 on-street survey who were interviewed in the town centre.

Table 6.3: Top five 'likes' and 'dislikes' regarding South Woodham Ferrers Town Centre amongst visitors surveyed in the town centre

"Likes"	(%)	"Dislikes"	(%)
Close to home	48%	Nothing	64%
Good selection of food shops	14%	Poor range of leisure activities	6%
Pleasant/attractive environment	27%	Poor selection of non-food shops	12%
Not too crowded	17%	Unattractive	4%
Clean/well maintained streets	14%	Poor selection of food shops	10%

Source: On-street survey (2015).

Table 6.4: Top five 'likes' and 'dislikes' regarding South Woodham Ferrers Town Centre amongst all telephone survey respondents

"Likes"	(%)	"Dislikes"	(%)
Close to home	17%	Nothing	53%
Easy to park	8%	Lack of foodstores	6%
Attractive environment	5%	Poor selection of non-food shops	8%
ASDA	8%	Poor range of chain stores	10%
Cheap parking	4%	Too long / inconvenient journey	6%

Source: telephone survey (2015).

Summary

- The town centre is dominated by the Asda foodstore, which is an important anchor to the centre and draws trade from Zones 1, 3, 6 and 7, along with a small amount of trade from outside of the household survey area.
- There is a limited range and selection of comparison retailers in the town centre. Both the on-street and household surveys point towards a qualitative deficiency in comparison goods provision.
- There is a high proportion of services uses in the town centre, which benefit from trade from the walk-in catchment area and linked trips with the Asda.

- The proportion of vacant units in the centre is below the national average.
- There is evidence of the ASDA store performing a significant anchor role to the town centre, attracting many shopping trips. In addition to this anchor role, the ASDA benefits the town centre by providing linkages to other parts of the town centre which will benefit from ASDA's presence and popularity. Therefore, any impact upon the amount of shopping trips at ASDA will not only impact upon the viability of that store but also will have an impact upon the wider town centre.

7. Qualitative Assessment - Principal Neighbourhood Centres

7.1 In this section, we examine the role and health of the Principal Neighbourhood Centres within Chelmsford City. Our analysis draws largely on data provided by Chelmsford City Council and our own audits carried out in January 2014 and again in July 2014.

7.2 The retail hierarchy, defined by the Core Strategy, identifies four Principal Neighbourhood Centres: The Vineyards, Great Baddow; Chelmer Village; Gloucester Avenue; and Newlands Spring, North Melbourne. The centres are located within the Chelmsford urban area, to the south east, east, south, and northwest of Chelmsford City Centre (respectively).

7.3 The Proposals Maps which accompany the Site Allocations DPD and North Chelmsford AAP define the boundary and shopping frontages of the Principle Centres. The tables below identify the composition of uses within the adopted defined retail frontages.

The Vineyards, Great Baddow

7.4 The Vineyards Neighbourhood Centre at Great Baddow is located approximately 2.5 miles south east of Chelmsford City Centre, and is the largest of Chelmsford's Principal Neighbourhood Centres. It is easily accessible from the local road network, including Essex Yeomanry Way (A114), Main Road (A414) and Junction 18 of the A12. The entire centre falls within a designated Conservation Area.

7.5 The majority of the services and facilities are located within a central precinct comprising 16 units, with residential accommodation above. Adjacent to this are two car parks (located off the Causeway), a vacant six-storey commercial building and an area of designated open space. Other units within designated frontage are located along Maldon Road and High Street, with a cluster on High Street in the south of the centre.

7.6 Table 7.1 below provides a summary of the composition of uses in the designated retail frontage.

Table 7.1: Retail Composition: The Vineyards, Great Baddow

Retail Category	No. of Units	% of Total
Convenience	6	13.6
Comparison	14	31.8
Retail Service	8	18.9
Leisure Service	7	15.9
Financial Service	4	9.1
Vacant	2	4.5
Miscellaneous	3	6.8
Total	44	100

Source: GVA Audit January 2014. Uses classified using GOAD's 'summary report' classification. Survey covers The Vineyards and surrounding area.

7.7 The Vineyards provides good a mix of services and facilities to serve Great Baddow and the wider catchment within the Chelmsford Urban Area. The Centre has six convenience goods retailers including a 312 sqm (net) Co-Op foodstore which provides local 'top up' food shopping, alongside a greengrocers, butchers and bakery. There is a mix of service retailers including hairdressers, a bank and a cafe. It also provides a post office and a Boots pharmacy. The centre also includes important community facilities, which provide an important contribution to the diversity of the centre, including a library and the parish hall.

7.8 At the time of the survey the centre's two car parks were nearly at capacity. Further short stay on-street car parking on the surrounding roads was also in continuous use. A bus stop located on the Causeway provides public transport connecting the local area with four services an hour to Chelmsford City Centre.

7.9 The Vineyards benefits from a pleasant and well-maintained shopping environment. The precinct units front a central pedestrianised square. Planters and hanging baskets, lighting, litter bins and seating contribute to the attractive public realm. The modern architecture of the café, which features a clock tower fronting the entrance to the precinct, also contributes to the centre's strong sense of place. The majority of footfall was focused around the precinct and to and from the adjacent car park.

7.10 Our survey identified only two vacant units, representing 4.54% of the total which is below the national average. These units were small and located along High Street towards the south of the centre. Although not a retail vacancy, the six-storey commercial building currently detracts from the environment and shows signs of vandalism and neglect. If no longer required for commercial use, it could have potential for redevelopment with ground floor retail uses.

Chelmer Village

7.11 Chelmer Village Neighbourhood Centre is located on Village Gate, approximately 2.5 miles east of Chelmsford City Centre towards the eastern edge of the Chelmsford urban area. The centre is within a residential area and is also within close proximity (0.5 miles) to Chelmer Village Retail Park. Access is via Chelmer Village Way just off Chelmer Road (A138).

7.12 The majority of the designated centre boundary is comprised of the Asda foodstore and car park. An area of designated open space to the north provides a link between the centre and the surrounding residential area. The Proposals Map identifies a small adjacent land designation proposed for housing to the south. This is currently occupied by the Asda petrol filling station and large grass verge separating it from Chelmer Village Way.

7.13 Table 7.2 below provides a summary of the composition of uses in the retail frontage.

Table 7.2: Retail Composition: Chelmer Village

Retail Category	No. of Units	% of Total
Convenience	1	12.5
Comparison	2	37.5
Service	4	50.0
Vacant	0	0
Miscellaneous	0	0
Total	8	100

Source: GVA Audit (2014). Uses classified using GOAD's 'summary report' classification.

7.14 The centre is anchored by the Asda foodstore which is the only convenience unit present and provides weekly 'main' food shopping including in-store bakery, deli and hot food counter. The store is 3,209 sqm (net) of which approximately 70% is used for the sale of convenience goods. The store also provides an extensive non-food range including clothing, books, stationary, multimedia and electrical items as well as the ability to click and collect online purchases from a wider range of products. The store also provides separate recycling facilities and a petrol filling station.

7.15 The centre has 7 further retail units within a pedestrianised square around the entrance to the Asda. The centre provides uses including a pharmacy, opticians, bank, café. These retail uses are complimented by non-retail uses including a bookmakers, pub, a nursery and a dentist. The centre is healthy with a good balance of services and no vacant units.

7.16 Outside of the designated retail frontage (but within the centre boundary) there is also a doctor's surgery, church and village hall, all of which provide an important contribution to the diversity of the centre.

7.17 The Asda car park provides free parking for customers and the Centre's other uses. At the time of the survey, the car park was at approximately 75% capacity. Bus stops are located 200m walking distance in both directions along Chelmer Village Way. These provide frequent numerous services connecting to Chelmsford City Centre and the local area. There are also less frequent services to other centres including Colchester, Great

Baddow, and Hatfield Peverel. There are also several footpaths through the open space which link the centre to residential areas to the north.

7.18 The centre benefits from a pedestrianised square with lighting and street furniture including litter bins and seating. Footfall is focused around the entrance to Asda, with the highest concentration of pedestrian footfall between the store and car park.

Gloucester Avenue

7.19 Gloucester Avenue Neighbourhood Centre is located approximately 2.5 miles south of Chelmsford City Centre in the residential area of Moulsham. The centre is approximately a mile from London Road (A1114) which leads to Chelmsford City Centre and Junction 15 of the A12.

7.20 The centre is focused around an 'L' shaped parade of shops which, along with a pub, comprise the centre's retail frontage. A customer car park is located in front of the retail units off Gloucester Avenue. There are two storeys of residential accommodation above the parade. The centre is entirely in private ownership, which will necessarily limit the degree of influence the Council will have in its active management.

7.21 Table 7.3 below summarises current composition of uses in the retail frontage.

Table 7.3: Retail Composition: Gloucester Avenue

Retail Category	No. of Units	% of Total
Convenience	4	28.6
Comparison	4	28.6
Service	6	42.9
Vacant	0	0
Miscellaneous	0	0
Total	14	100

Source: GVA Audit (January 2014). Uses classified using GOAD's 'summary report' classification.

7.22 Gloucester Avenue provides a wide mix of services and facilities to serve the surrounding residential area catchment area. The centre benefits from four convenience goods retailers including a small Co-Op foodstore which provides local 'top up' food shopping, alongside a bakers, newsagents, and off-license. There is a mix of service retailers including hairdressers, a dry cleaner and a number of hot food takeaways. There is no bank or building society present. The centre provides a good mix of services and has no vacant units.

7.23 Outside of the retail frontage but within the centre boundary, there are also a number of other community facility uses including a doctor's surgery, clinic and two churches, which make an important contribution to the diversity of the centre.

7.24 The centre is easily accessible by foot from the neighbouring residential roads. A bus stop located on the Gloucester Avenue provides public transport connecting the local area with four services an hour.

7.25 At the time of the survey the centre's car park was busy. It benefited from resurfacing and upgrading works in May 2014, which have improved the layout and appearance of the area. We understand that the managing agents of the centre may be considering other measures to enhance the appearance of the centre, which should be encouraged by the Council.

Newlands Spring, North Melbourne

7.26 Newlands Spring Neighbourhood Centre at North Melbourne is located 2 miles north west of Chelmsford City Centre. The centre is located on Dickens Place, accessed via Chignal Road. The retail frontage consists of the Morrison's foodstore at Dickens Place.

7.27 The Morrisons foodstore is circa 2,081 sqm (net) and approximately 90% is used for the sale of convenience goods. The store includes an in-store bakery, butchers, fishmongers, deli and pharmacy. The store also provides an ATM and free car parking facilities.

7.28 The centre does not accommodate any comparison offer (other than that which is contained within the Morrisons store), or retail or financial services. There is a primary school, doctor's surgery, library and public house adjacent to Morrisons, within the town centre boundary.

7.29 The Morrisons car park provides free parking for customers as well as visitors to the doctor's surgery. There is a separate car park for visitors to the library and school. At the time of the survey, the car park was at approximately 75% capacity. The centre is accessible by public transport with bus stops located along Copperfield Road. These provide frequent services which connect the centre to the local area and Chelmsford City Centre. The centre is easily accessible by foot from the neighbouring residential roads.

7.30 As one would expect, footfall is focused around the entrance to Morrisons, with pedestrian flows focused to and from the car park. Due to land constraints, there does not appear to be any obvious opportunities to expand the centre or introduce new uses.

Summary

- The Principal Neighbourhood Centres have a more limited range and scale of facilities and services than the town centres, however they play an important role in meeting the day-to-day needs of the local catchment and promote sustainable urban living. Adjacent community uses play an important role in generating activity and linked trips with existing shops and facilities.

- Great Baddow provides a good range of shopping facilities to meet the every-day requirements of the local catchment area. Vacancies were well below the national average and the centre appears to be active and well-maintained.
- Chelmer Village is anchored by a large Asda foodstore which accounts for 11% of convenience goods expenditure in Chelmsford's core zones. The centre is healthy, has a good balance of services and there are no vacant units.
- Gloucester Avenue provides a wide mix of services and facilities to serve the surrounding residential catchment area and has no vacant units. The car park has recently been upgraded. We understand that the managing agents are considering other potential measures to enhance the appearance of the centre, which should be encouraged.
- North Melbourne comprises a Morrisons foodstore, which serves an important main and top-up shopping role for nearby residents s. Outside of the retail frontage, there is a primary school, doctor's surgery, library and public house which also serve an important role attracting footfall and activity in the centre.

8. Quantitative Needs Assessment

8.1 This section outlines the quantitative assessment methodology used to identify shopping patterns and quantitative retail need. Using the results of household telephone surveys (2013 and 2015) we provide an analysis of shopping patterns arising in the survey area. The current performance of convenience and comparison goods floorspace across the City Council Area is then used as the basis for forecasting the need for additional retail floorspace across up to 2036 (incorporating interim years of 2020, 2025, 2030 and 2034).

8.2 It is important to note that capacity forecasts become increasingly open to margins of error over time and will be influenced by potential changes in economic circumstances. Longer term projections should be treated with caution. As such it will be necessary for the Council to update these forecasts regularly over the Local Plan period.

8.3 For clarity, the capacity figures referenced below and set out in Appendix 1 are cumulative.

Methodology

8.4 We have used a conventional and widely accepted step by step methodology, consistent with best practice, which draws upon the results of the household telephone surveys (2013 and 2015) of existing shopping patterns to model the existing flows of available expenditure to centres in Chelmsford. We also identify the main competing centres which have an influence on shopping patterns in the City Council Area. To develop the baseline position we have:

- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode and ward areas comprising the Chelmsford catchment area;
- Allocated the available projected expenditure to the convenience and comparison goods shopping destinations, on the basis of the household telephone survey of shopping patterns so as to provide estimates on current sales and forecasts of future sales;
- Compared the total expenditure attracted to each shopping destination with current retail floorspace to assess sales densities/performance in each shopping destination.

8.5 Building on the baseline position, we have explored the need for further convenience and comparison retail floorspace within the City Council Area, having regard to the performance of existing floorspace.

Data Inputs

Survey Area and Household Telephone Survey

8.6 In order to identify shopping patterns across the City Council Area, this assessment uses the results of two GVA household telephone surveys which were commissioned specifically for this study. The first survey was undertaken in December 2013 and covered 1,200 households across 12 survey zones. Following a decision to gain further information in relation to the usage of South Woodham Ferrers town centre, a further household survey was undertaken in March 2015. This survey covered 1,200 households across 10 separate zones. In part, the two survey areas overlap and therefore our quantitative assessment uses the 2015 survey results in these particular areas. Plan 1 in the appendices to this report shows the composite survey area, with data from the 2015 survey informing Zones 1-10 and the 2013 survey informing Zones 11-18.

8.7 As with any data collection exercise where a sample is being drawn to represent a population, there will always be a potential difference between the response from the sample and the reality in the population as a whole. This is called the ‘standard error.’ Many steps have been undertaken by our chosen market research company NEMS to minimise the standard error, including random sample selection and questionnaire construction. NEMS have confirmed that the results are regarded as being sufficiently robust, with a 95% confidence internal of +/- 2.8%.

8.8 The household telephone survey results identify shopping habits of households for both convenience and comparison goods. Where necessary, survey results have been rebased to remove some responses (such as ‘don’t shop for particular goods’ and ‘internet shopping’) to ensure consistency with categories excluded in the expenditure projections.

8.9 For convenience goods, the household telephone surveys included questions on main food and top-up food shopping. The results of the two types of food expenditure were then merged through the application of a weight which reflects the estimated proportion of expenditure accounted for by each goods type (70% main food / 30% top-up food).

This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore for each survey zone.

8.10 The household telephone surveys also included seven questions on where respondents normally undertake shopping for the following comparison goods types, which coincide with Experian Business Strategies definitions of comparison goods expenditure:

- Clothing and footwear;
- Furniture, floor coverings and household textiles;
- DIY and decorating goods;
- Domestic appliances;
- Audio-visual equipment;
- Personal and medical goods; and
- Recreational and luxury goods.

8.11 In order to determine the composite market share for all comparison goods spending within the survey area, we apply the weighted averages of the household telephone survey results for each goods type based on the proportion of per capita spend on that goods type. This process establishes the pattern of comparison spending for residents in each of the survey zones and is an accepted approach which ensures that market shares for centres and stores are not skewed by any particular goods category.

Estimates of Population in the Survey Area

8.12 Population estimates and forecasts for each of the survey zones are provided by Experian. This data provides estimates of population from 2012 to 2032, incorporating the results of the 2011 Census. After 2033, population growth is estimated by adopting average per annum population growth rates from 2012 to 2031.

8.13 Overall, the population of the survey area in 2015 is estimated to be 680,775. It is forecast to grow to 707,796 by 2020 and 735,079 by 2025. By 2036, the population of the survey area is forecast to reach 788,831. This represents an overall strong increase of 16% over the course of the assessment period.

8.14 In order to ensure consistency in approaches when forecasting population growth in the City Council Area, we have undertaken a 'sense check' to confirm that Experian population forecasts for the City Council Area are consistent with assumptions adopted to inform other evidence base documents for the Council. As part of this exercise, we compared Experian's average population growth in zones 1, 4, 5, 11, 12, 13 and 14, for 2015-2036 to the average per annum population growth in Chelmsford City Council Area over the same period as contained within Edge Analytics' draft Phase 7 Demographic Report for the City Council Area. The results of the 'sense check' show that Experian average per annum growth forecasts are around 13.6%, compared to Edge Analytics forecast of 14.0%. We therefore conclude that the use of Experian forecasts for the purposes of this study remain appropriate and will be consistent with forecasts used to inform other evidence base documents.

Available Expenditure in the Survey Area

Deductions for Special Forms of Trading (SFT)

8.15 The Experian E-Marketer system provides estimates of per capita expenditure for convenience and comparison goods expenditure in 2013 prices. We have made deductions for Special Forms of Trading (SFT) which represent expenditure not available to spend in shops (for example internet or catalogue shopping). The deductions we have applied for SFT for convenience and comparison goods are derived from Experian Retail Planner Briefing Note 12.1.

8.16 We have undertaken a 'sense check' to confirm that the SFT deductions applied are reasonably consistent with household survey evidence in the City Council Area. We have assessed the weighted, non-filtered results of the household survey, which indicate that approximately 7.5% of convenience expenditure across the entirety of the study area is derived from the internet.

8.17 Since non-store retailing figures include supermarkets and other retailers that source internet goods sales from store space, the share of non-store retailing is over-stated when assessing requirements for physical floorspace. Experian recommend a deduction of 70% to take this into account, which would bring total SFT deductions to around 2.2%. However, the results are based on where households are most likely to do <u>most</u> of their main food and top-up shopping, and it may be that the results may understate the influence of the internet on convenience expenditure. As such, we consider that it remains appropriate to adopt Experian estimates of 2.8% in 2015.

8.18 Based on weighted (non-filtered) household survey results, weighted to the various comparison goods expenditure sub-categories, the household survey results show that internet shopping varies across various goods categories, varying from 6.3% (clothing goods), 6.2% (furniture goods), 0.7% (DIY), 18% (domestic appliances), 16% (audio-visual goods), 3% (personal and medical goods), 30% (book) and 22% (recreational and luxury goods). We consider that this is reasonably close to Experian estimates, which we have adopted for the purposes of this study.

Growth Rates

8.19 To estimate available expenditure in the survey area, we have applied growth rates based on the latest economic forecasts published by Experian Business Strategies (Retail Planner 12.1). For convenience goods we have applied growth rates of -0.8% for 2014, +0.2% for 2015, +0.2% for 2016, 0.3% for 2017, +0.1% for 2018, +0.4% pa for 2019-2020, +0.2%pa for 2021, +0.6% for 2022, +0.7% for 2023, +0.6% pa for 2024-2025, +0.5% pa for 2026-2027, +0.7% for 2028, +0.5% pa for 2029-2030, +0.6% pa for 2031-2032, +0.5% for 2033, +0.6% pa for 2034-2036.

8.20 For comparison goods we have adopted growth rates of: +4.9% for 2014, +3,5% for 2015, +2.2% for 2016, +2.1% pa for 2017-2018, +2.5% for 2019, +2.6% for 2020, +2.9% for 2021, +3.1% for 2022, +3.3% for 2023, +3.4% pa for 2024-2025, +3.3% pa for 2026-2027, +3.4% pa for 2028-2030, +3.5% pa for 2031-2032, +3.4% for 2033 and +3.6% pa for 2034-2036.

8.21 These growth rates reflect that we expect spending on comparison goods to grow faster than convenience goods, as the scope to purchase more food is limited. These assumptions take into account current economic circumstances and the effects of the recession, which have had a significant impact on forecast levels of growth expected over the assessment period. As a result, the expenditure growth rates used in this study are less optimistic than those used in the previous 2005 Retail Study.

Available Expenditure

8.22 Taking these considerations into account, expenditure has been generated within each zone to highlight variations across the survey area. Using the growth rates above and applying relevant deductions for SFT, total available expenditure across each of the zones and the survey area as a whole has been grown in five year intervals (of 2020 2025, 2030 and 2034) up to 2036. These five year intervals represent 5 year forecasting periods as required by the NPPF.

8.23 Appendix 1, Table 3 applies per capita expenditure within each zone to the population forecasts, which indicates that total available convenience goods expenditure within the survey area at 2015 is £1.47bn. This is forecast to grow to £1.55bn by 2020, £1.65bn by 2025, £1.76bn by 2030 and £1.86bn by 2036. This equates to an overall growth of £390m (26% growth) between 2015 and 2036.

8.24 Comparison goods expenditure within the survey area at 2015 is £2.3bn. This is forecast to grow to £2.7bn by 2020, £3.2bn by 2025, £4.0bn by 2030, to a total of £5.0bn by 2036. This equates to an overall growth for comparison goods expenditure in the survey area of £2.3bn between 2015 and 2036 (85% growth).

8.25 Again, longer-term projections should be treated with caution due to the potential for changing economic circumstances and susceptibility of longer-term forecasts to margins of error.

Floorspace Data

8.26 The convenience and comparison goods floorspace data used in our modelling has been drawn from the Institute of Grocery Distribution (IGD), Chelmsford City Council, Experian Goad and Trevor Wood Associates. Floorspace figures for destinations which were not available through other sources were estimated by applying an estimated 'benchmark' turnover to the results of the household survey.

8.27 Our floorspace assumptions for the foodstores include adjustments, where necessary, to identify the proportion of purely convenience goods floorspace. Most superstores include a proportion of non-food floorspace, which we have estimated using the latest data provided by Verdict in 2014. The previous 2005 Retail Study and site visits of the main foodstores. This accords with the expenditure data and the expenditure assumptions used.

Benchmark Sales Densities

8.28 For convenience goods, we have estimated the expected benchmark turnovers of various stores within the City Council Area by adopting company average sales densities from research provided by Verdict. Sales densities for the larger retailers range from £7.823 per sqm net for the Co-Op to £13,350 per sqm net for Asda. For "other" stores within Chelmsford City Centre, we have calculated the total benchmark of smaller stores in the centre using company average figures for Marks & Spencer (the High Street, and Duke Street) Iceland (Springfield Road), Tesco Express (Duke Street), and Co-Op (Duke Street), and assuming the remainder of convenience floorspace in the city centre will have a sales density of £5,000 per sqm net.

8.29 For other floorspace in South Woodham Ferrers Town Centre and the Principal Neighbourhood Centres, we have assumed that these stores are achieving a sales density of £4,500 per sqm net. For floorspace in the Local Centres, the benchmark turnover has been calculated by adopting the company benchmark figures for the Co-Op (Danbury, Boreham, Long Brandocks, and Bridge Street) and Tesco Express (Danbury, Broomfield Road), and assuming other floorspace is achieving a sales density of £4,000 per sqm net.

8.30 No benchmarking exercise is undertaken for comparison goods, as there is more limited published floorspace and benchmark turnover data for these types of goods.

Convenience Goods Capacity Projections

8.31 Drawing on our qualitative assessment of the health and performance of existing centres and the main out-of-centre retail destinations in the City Council Area, this section presents our analysis in respect of the capacity for additional convenience floorspace over the plan period to 2036. The detailed models are set out in Appendix 1.

Chelmsford City Centre

8.32 Convenience destinations in Chelmsford City Centre account for around 3.6% across the study area. In total, we estimate that convenience stores in Chelmsford City Centre have a current (2015) turnover of £54m (Appendix 1, Table 5a). Circa 60% is derived from Zone 11 (which covers the Chelmsford urban area).

8.33 The Tesco on Springfield Road accounts for around 40% of all convenience expenditure retained in the city centre. The results of the household survey indicate that the store has a study area derived turnover of £21.8m, which is approximately 18% below the expected company benchmark levels.

8.34 Other local stores in the city centre turnover a total of £32.2m, which is lower than expected benchmark turnover of £44.9m. These results are is not necessarily uncommon, as surveys can sometimes underestimate the performance of city centre 'top up' foodstores.. The household survey results indicate that other stores in the city centre account for 2% within the survey area.

South Woodham Ferrers Town Centre

8.35 As described previously in Section 6, convenience provision in South Woodham Ferrers Town Centre is dominated by the Asda and this is reflected in the results of the 2015 household survey.

8.36 Based upon the results of both household surveys, but primarily influenced by the March 2015 survey, the survey data indicates that the Asda draws trade from Zones 1-7 and 9-10. The key survey zones for main food shopping at the store are Zones 1, 4, 6 and 9. We calculate the store to have a study area derived turnover of £41.2m which is higher than the benchmark turnover of £38.6m for this store.

8.37 In terms of additional trade from beyond the survey area we have had regard to the 2015 in-street survey of South Woodham Ferrers commissioned for this study and also the 2013 & 2015 household survey data. The in-street survey indicates that 9% of town centre visitors travel from outside of the study area.

8.38 Use of this inflow figure would boost the study area derived turnover of the Asda from £41.2m to £44.9m. This would put the Asda store's convenience goods floorspace at a trading level which is approximately 16% above the expected benchmark turnover of £38.6m.

Principal Neighbourhood Centres

8.39 Overall, the City Council Area's Principal Neighbourhood centres account for 5.2% across the survey area as a whole. This is higher than the city centre, and highlights the important role that Principal Neighbourhood Centres in the Chelmsford urban area have in meeting local needs. The household survey identifies market shares for the more dominant foodstores in the City Council Area and local centres (Appendix 1, Table 5a).

8.40 The Asda at Chelmer Village is the largest foodstore in the City Council Area's Principal Neighbourhood Centres. The survey indicates it has a turnover of £42.5m, which is around £12.5m above expected company averages. Around half of this store's trade is drawn from Zone 11 and it accounts for 12% of all convenience expenditure being spent in Chelmsford's convenience goods stores.

8.41 The Morrisons in North Melbourne is the second largest foodstore in the City Council Area's Principal Neighbourhood Centres. The household survey indicates that it has a turnover of about £32.2m, which is approximately £8m above expected company average levels. Around half of this store's trade is drawn from Zone 11.

8.42 Other convenience provision in Principal Neighbourhood Centres serves a more limited secondary and top-up role. The results of the household survey indicate that these stores are trading well, at or above expected benchmark levels. Almost all of their trade is drawn from Chelmsford's core zones, the highest proportion of which comes from within their own zones.

Out-of-Centre Foodstores

8.43 Our analysis of the household survey results has identified the trade draw and catchment areas of the principal out of centre foodstores in the City Council Area.

Tesco, Princes Road

8.44 The household survey indicates that the convenience goods element of the Tesco store turns over £69m, which is above the expected benchmark of £43.4m. Around half of the store's trade is drawn from Zone 11 although a large amount of main food shopping expenditure is also drawn from Zones 3, 13, 14 and 15. The Tesco store is the second best performing store in Chelmsford in terms of study area derived turnover and accounts for every one in five pounds of convenience goods expenditure in Chelmsford stores.

Sainsbury's, Springfield

8.45 The household survey results show that the convenience goods element of the Sainsbury's turns over approximately £80m, which is significantly above the expected company benchmark turnover of £54.6m. We understand that the store also exhibits symptoms of over-trading[9], including queues in the store/car park and overcrowding. Whilst a significant amount of trade comes from the Chelmsford urban area (Zone 11), the Sainsburys store draws from a wide area including Zones 5, 12, 13, 14, 16 and 17. This store accounts for 24% of all convenience goods expenditure spent in stores across Chelmsford.

Other

8.46 Additional smaller scale out-of-centre foodstores in the area include an Aldi on Springfield Road and a Lidl and Farmfoods on Princes Road. The household survey results indicate that both of these stores are trading well, significantly above expected benchmark levels, attracting main and top-up food shopping trips from both the Chelmsford urban area and a wider catchment.

Commitments and Pipeline Developments

8.47 In order to ensure our capacity forecasts are as up to date and robust as possible, we take account of new convenience goods developments already coming forward as a result of existing planning permissions. We have factored into our assessment the following commitments:

- Waitrose, Victoria Road (Ref. 12/0833/FUL): Redevelopment of the former Royal Mail sorting office on Victoria Road to accommodate a Waitrose store of 2,224 sqm net. We have assumed that approximately 80% of floorspace will be used for the sale of convenience goods.
- Extension to Aldi, Springfield Road (Ref. 13/01433/FUL): A small (233 sqm net) extension, which brings total sales floorspace of the store to 987 sqm net. This extension has now been completed.

[9] 'Over-trading' refers to when a store trades above its expected benchmark turnover and is unable to cope with existing demand. Symptoms can include overcrowding, congestion, long queues. Although there is no converse

- New Retail Store, Land East of North Court Road (Ref. 13/00409/FUL): New retail store of 370 sqm net to support mixed use development including 178 dwellings, care home and GP surgery.
- M Local, 50 High Street: Morrisons opened an M Local store in the former Burger King unit on the High Street in January 2014, which we have treated as a commitment for the purposes of this assessment.[10]
- New Nisa, 1 Church Road, Boreham, Chelmsford (Ref. 14/00402/FUL): demolition of existing buildings and construction of a new retail shop of 349 sqm (net). We have assumed 95% will be used for the sale of convenience goods.
- New Aldi Foodstore on Land at Former 79 Parkway, Chelmsford (Ref. 13/01328/FUL): a new 972 sqm net foodstore on the site adjacent to the Army & Navy. We have assumed 90% will be used for the sale of convenience goods.

8.48 There is also extant consent for a new foodstore as part of the University Campus redevelopment at Victoria Road, which was granted by the Council in January 2012 (Ref. 11/01360/FUL), however we understand that the developer no longer has any intention to bring this site forward for convenience retailing. We have therefore been advised by the Council not to consider this as a commitment for the purposes of this study.

Baseline Convenience Capacity

8.49 In assessing capacity for future convenience goods floorspace, we have assumed that the efficiency with which existing floorspace is being used will change over time. We have adopted the latest advice published by Experian (Retail Planner Briefing Note 12.1).

8.50 Based on the combined turnover and current market share[11] of the main convenience destinations in Chelmsford (including out of centre foodstores), we estimate that there will be surplus convenience goods expenditure of c. £54.5m at 2020. By virtue of the forecast growth in population and expenditure, and after allowing for existing in-centre convenience stores to improve sales efficiency in line with Experian's advice, we estimate

[10] As the store opened after the household survey was completed
[11] From our household survey

that the identified surplus of available expenditure will increase to £79m by 2025, rising to £104m by 2030 and £134m by 2036.

8.51 To translate this surplus expenditure into floorspace, we have assumed that mainstream foodstore operators would aim to achieve an average sales density of around £12,000 per sqm net, changing over time in line with Experian's sales density forecasts. As is our normal practice, we have not prepared low and high sales density capacity forecast. Instead we have focused on the capacity available to support main foodstores. If smaller operators or discount retailers came forward, the amount of capacity arising would be greater as they would achieve a lower sales density.

8.52 Table 8.2 below summarises forecast global capacity for additional convenience floorspace in the City Council Area, based on the results of our household survey, assuming a constant market share approach. Please note that all figures in the capacity tables are cumulative, and show total capacity between 2015 and each respective assessment year.

8.53 We distinguish between potential capacity in the Chelmsford urban area (which includes the City centre and Principal Neighbourhood Centres) and South Woodham Ferrers Town Centre. As stated above, capacity forecasts over the longer term should be treated with caution.

Table 8.2: Convenience Capacity Forecasts for Large Store Format Floorspace (sqm net)

	2015	2020	2025	2030	2036
Chelmsford Urban Area	2,759	4,594	6,721	8,842	11,535
South Woodham Ferrers Town Centre	757	992	1,273	1,556	1,916
Chelmsford (GLOBAL)	3,516	5,586	7,994	10,398	13,451

Source: Tables 10a & 10b, Appendix 1. All floorspace requirements are cumulative.

8.54 For South Woodham Ferrers, the analysis indicates that, based on the survey commissioned for this study, there is a modest amount of surplus capacity for new convenience goods floorspace. In the short term, this is primarily driven by the trading performance of the Asda store (as measured by the household surveys commissioned for this study) and will grow in the future due to population and expenditure growth. Based upon a constant market share, sufficient quantitative capacity for a medium sized new store will only arise after 2030.

8.55 Looking beyond the constant market share scenario for South Woodham Ferrers, it should be noted that there is some leakage of expenditure from Zone 1, which is the zone in which South Woodham Ferrers lies. For example, 26% of first choice and 75% of second choice main food shopping trips are lost to other settlements, as are 29% of first choice top-up food shopping trips. As a consequence, there is an opportunity to claw back some of this expenditure which could in turn increase the amount of available expenditure to support new convenience goods floorspace. In addition, parts of Zones 2, 4, 6 and 10 are also likely to lie in the natural catchment of South Woodham Ferrers and there may be an opportunity to increase the amount of retail expenditure which is available to stores in the town. However, the ability to do so will be dependent upon the type and scale of any new proposal in South Woodham Ferrers and the extent of catchments of other towns/stores, and this will need to be tested as and when specific detailed proposals come forward.

8.56 In relation to the spatial distribution of existing convenience goods floorspace across the City Council area, we have considered whether there are gaps in provision both now and in the future. In order to do this we have prepared a plan which shows the location of existing large foodstores and supermarkets across the City Council area and a 10 minute drive time area from these stores. This is plan No.4 at the rear of this document.

8.57 The plan shows that the majority of the City Council area is within a 10 minute drive of a large foodstore, particularly the urban areas of Chelmsford and South Woodham Ferrers and the surrounding rural hinterland. The plan also shows that the planned urban extensions in north-west and north-east Chelmsford are also covered by this area. The plan also indicates those Output Areas (from the 2011 Census) which lie outside of the 10 minute drivetime and the resident population of these areas. This shows that a relatively small part of the City Council area, in terms of population is not within a 10 minute drive of a foodstore. This is not an unusual situation in our opinion, as many rural and semi-rural areas experience this phenomenon and it is unrealistic to expect large foodstores and supermarkets to be provided in such locations.

8.58 The plan also shows the geographic distribution of stores across the two main urban areas. In relation to South Woodham Ferrers, there is only one store (ASDA) and this is centrally located in the town centre, making it very accessible to local residents. As the plan shows, the ASDA store is the only foodstore within a 10 minute drive time of the centre. The majority of Chelmsford residents have more than one major retail store within minute drive time.

8.59 For Chelmsford, the plan shows that there is a good distribution of stores, including the city centre (Tesco), the Chelmer Village ASDA, the Morrisons at North Melbourne and the out of centre Sainsburys and Tesco stores. These are supplemented by discount foodstores and the committed Waitrose. Therefore, there are no particular 'gaps' in Chelmsford, although the Council is right to promote new local centres in the northern urban extensions.

Comparison Goods Capacity Projections

Chelmsford City Centre

8.60 The results of the household surveys show that Chelmsford City Centre retains approximately 25% of available comparison goods spend in the survey area. This is the highest level of retention of all the centres (and out-of-centre destinations) in the City Council Area and demonstrates the popularity and strength of Chelmsford as a shopping destination.

8.61 Comparison goods floorspace in Chelmsford City Centre turns over around £581m. Based on the results of the household survey and the scale of existing comparison goods floorspace in the centre (as recorded by the latest Goad Category Report), city centre floorspace achieves an average potential turnover of around £18,000 per sqm. Taking into consideration the strong position of Chelmsford in the regional hierarchy (as reviewed in Section 3 of this report), it is not surprising that Chelmsford performs very strongly. Based on our experience elsewhere, this is high and may indicate (unfulfilled) latent demand for retail floorspace in the city centre, however as we did not identify any of the symptoms of overtrading on our visits to the centre, for the purposes of this capacity assessment we have assumed that existing floorspace is trading at equilibrium levels.

Chelmsford Out of Centre

8.62 The results of the household survey demonstrate that out-of-centre floorspace in the City Council Area currently retains around 9% within the study area. This is the second highest market share attributed to retail destinations in the City Council Area (after Chelmsford City Centre).

8.63 Out of centre comparison goods floorspace in the City Council Area currently turns over around £210m. Based on the results of the household survey and the scale of existing comparison goods floorspace in the centre (as recorded by Trevor Wood Associates), floorspace achieves an average potential turnover of around £4,500 per sqm. Out of centre floorspace draws around 65% of its trade from Chelmsford's core zones, indicating that it serves a less prominent regional role than the city centre.

South Woodham Ferrers Town Centre

8.64 The household survey indicates that comparison goods floorspace in South Woodham Ferrers Town Centre has a turnover of around £20.6m. As stated above, comparison goods offer in South Woodham Ferrers Town Centre is relatively weak, and is primarily comprised of non-food offer in the Asda and the nearby George clothing store. The household survey shows that all of the centre's turnover comes from Zones 1, 2, 4,5, 6, 9 and 10 of the study area.

Commitments and Pipeline Developments

8.65 We have factored in the following five known commitments for additional comparison goods floorspace in the City Council Area:

- John Lewis Department Store, Land East of High Street (Ref. 12/01058/FUL): Erection of a new 10,957 sqm (GIA) John Lewis in Chelmsford City Centre as part of wider mixed use development. For the purpose of this assessment, we have adopted a 80% GIA:net ratio to estimate the total sales floorspace of the store;
- Land East of High Street (Ref. 12/01058/FUL): Remaining comparison goods floorspace approved as part of wider development;
- Units 12-20 High Chelmer (Ref. 12.01492/FUL): Extension to existing units;

- Homelands Retail Park (Ref. 12/01284/FUL): Erection of new garden centre sales building.
- Waitrose, Victoria Road (Ref. 12/00833/FULL): Element of comparison goods floorspace (estimated to account for 20% of net floorspace) in Waitrose redevelopment at former Royal Mail Sorting office.
- Additional retail floorspace within the existing retail units at Riverside Retail Park.

Baseline Comparison Capacity (Scenario A)

8.66 In assessing capacity for future comparison goods floorspace, we have assumed that the efficiency with which existing floorspace is being used will increase over time. Drawing on the latest advice published by Experian (Retail Planner Briefing Note 12.1).

8.67 Based on the combined turnover and current market share of existing comparison goods destinations in the City Council Area, and after taking into account existing commitments, our assessment concludes that there will be no capacity to support additional comparison goods floorspace in Chelmsford until the latter end of the plan period (i.e. the late 2020's onwards). This is almost entirely due to the substantial new comparison goods floorspace committed in Chelmsford City Centre as part of the Bond Street redevelopment.

8.68 By 2030, the model shows a surplus of £68m to support new floorspace, growing to £269m by 2036. Adopting an average turnover for new floorspace of £7,000 per sqm and growing this in line with sales density assumptions discussed above, this results in a theoretical capacity for 7,000sqm net of new comparison floorspace by 2030, and 24,500sqm net by 2036. However, as stated above, longer-term forecasts should be treated with extreme caution.

8.69 Due to the limited existing market shares attributed to South Woodham Ferrers Town Centre and other Neighbourhood and Local Centres in the City Council Area based on a constant market share approach, we do not consider that it is appropriate to identify separate capacity forecasts for new comparison floorspace in these centres. However, this should not prevent an element of additional comparison goods floorspace coming forward in other centres where it reflects their role in the retail hierarchy, is in a town centre location, meets local needs, and qualitatively improves the vitality and viability of these centres. However, in practice we consider that opportunities and demand in these centres is limited.

Adjusted Market Share (Scenario B)

8.70 This assessment has considered the effect of Chelmsford maintaining its existing market share and used growth in available expenditure to support the development of new floorspace. However, the John Lewis department store and other significant additional comparison goods floorspace planned as part of the Bond Street development in Chelmsford City Centre will have the potential to attract residents from the survey area (particularly the outer zones) which may not have previously visited the city centre. Accordingly we have tested the potential implication of this new development on market shares and the amount of comparison floorspace that this redevelopment may support above the baseline capacity position.

8.71 Under Scenario B we have assumed that Chelmsford will maintain its current market share from within Zone 1 and market shares within the remaining core zones (Zones 2 - 5) will increase by up to 2%. This is primarily due to the already high market shares retained by Chelmsford City Centre and out-of-centre destinations within these zones. For the remaining zones we have made assumptions about the potential for the Bond Street development to increase market shares based on existing market share patterns and the distribution and likely attraction of centres and facilities.

8.72 Appendix 1, Table 11b provides capacity forecasts for comparison goods on the basis of the adjusted Scenario B market shares. The results demonstrate that even with the additional expenditure attracted to the centre as a result of the new Bond Street redevelopment, there is no theoretical capacity to support new comparison goods floorspace in Chelmsford until 2025 when there will be capacity for 2,700sq m net sales area. In the longer term, capacity will grow substantially but, as for convenience goods, these longer term forecasts should be treated with caution and updated at regular intervals during the course of the Local Plan period. Indeed, it is clear to us that the new development to the east of the High Street will meet the short to medium term needs of Chelmsford in terms of comparison goods shopping.

Summary

Convenience Capacity

- Our analysis shows that convenience floorspace in Chelmsford City Centre is trading below expected levels. Although household surveys tend to underestimate the performance of town centre stores, this may indicate a qualitative case to support new provision in the city centre to claw back expenditure from out-of-centre locations.
- Convenience floorspace in the Principal Neighbourhood Centres account for almost a quarter of total convenience expenditure within Chelmsford's core zone, primarily due to the strong trading performance of Asda in Chelmer Village and Morrisons in North Melbourne.
- In South Woodham Ferrers, there is evidence to suggest that the Asda store in the town centre is trading above company benchmark levels. However, even with this trading performance, the future level of capacity in South Woodham Ferrers is not sufficient in the short to medium term to suggest the need for a new supermarket. By 2036, the capacity for additional convenience goods floorspace in South Woodham Ferrers stands at 1,900sq m net.
- Out-of-centre foodstores are trading well, above expected benchmark levels and account for almost half of total convenience expenditure within Chelmsford's core zones.
- For Chelmsford, the capacity levels are 4,600sq m net by 2020, 6,700sq m net by 2025 and 11,500sq m net by 2036.
- Convenience capacity identified for the Chelmsford urban area should be directed partly to Chelmsford City Centre, and partly to other Principal Neighbourhood Centres in the urban area, in accordance with the NPPF. A priority for the Council should be to strengthen the convenience shopping role in Chelmsford City Centre and ensure that the Neighbourhood and Local Centres continue to perform a strong convenience goods role which serves local needs.

Comparison Capacity

- For comparison goods, our analysis shows that Chelmsford City Centre performs very strongly. It achieves the highest level of retention of all the centres (and out-of-centre destinations) in the City Council Area, which demonstrates the popularity and strength of the city centre as a shopping destination.
- Even when assessing the potential for this new planned floorspace to increase the market share of Chelmsford, our assessment found that there was no theoretical capacity to support new comparison goods floorspace until after 2025. After that point, capacity is forecast to grow significantly although care should be used with these predictions as they are based upon longer term projections.
- Comparison goods offer in South Woodham Ferrers Town Centre and the other Principal Neighbourhood Centres is relatively limited. Although we have not identified any specific capacity in these centres, this should not prevent an element of additional comparison goods floorspace coming forward in other centres where it reflects their role in the retail hierarchy, is in a town centre location, meets local needs, and qualitatively improves the vitality and viability of these centres.

9. Opportunities for Growth and Change

9.1 The NPPF advises Council's to plan positively to meet needs arising for city centre uses, requiring local planning authorities to allocate sufficient sites to meet identified retail needs in full. Our retail capacity assessment has not identified any theoretical capacity to support additional comparison goods floorspace in the City Council Area until the latter end of the plan period, even when assessing the potential uplift in market shares which could be generated by the Bond Street redevelopment in the city centre. As such, we do not consider it necessary for the Council to plan for additional comparison goods floorspace in the centre. As stated elsewhere, longer-term forecasts should be treated with extreme caution and capacity forecasts should be regularly updated over the course of the plan period.

9.2 In contrast, we have found capacity for additional convenience goods floorspace in the City Council Area in the short- to medium-term, and increasing significantly over the duration of the plan period. Drawing on our qualitative and quantitative analysis this section considers the scope for accommodating new convenience floorspace in the City Council Area. Specifically, in line with the sequential approach to site selection, we consider the potential for Chelmer Waterside, which has been a long-time regeneration priority for the Council, to contribute to meeting retail needs in the City Council Area.

Chelmer Waterside

9.3 Chelmer Waterside is a 40 hectare (98 acre) site which lies to the east of Chelmsford. It is surrounded by the River Chelmer and Springfield Canal Basin, and occupies a prominent position upon entering Chelmsford City Centre from the north east and south east. The site is currently comprised of large areas of former industrial land, established industrial and commercial uses, some housing, the Meadows surface car park, and land between Baddow Road and the River Chelmer. We understand that part of the site has now been sold to a national house-builder.

9.4 Chelmer Waterside has been identified as a significant redevelopment opportunity in Chelmsford City Centre for some time. During the time of our 2005 Retail Study, the site was being promoted by the Council for a substantial amount of retail floorspace catering for predominantly comparison goods. At the time, we advised that the site had the potential to serve as an extension to the city centre, providing land for large floorspace stores and providing a healthy and viable mix of uses to fulfil significant levels of identified retail need. However, around the time of the economic recession, retail interest at the scale originally envisioned by the Council fell away and the site was allocated for residential and leisure uses in the Chelmsford CTCAAP (2008).

9.5 Based on the results of our capacity assessment and qualitative review of demand in Chelmsford, we consider that there will be limited demand and little prospect of the site being redevelopment for large scale comparison goods floorspace in the short- to medium-term, particularly at the scale and of the type originally envisioned by the Council. There may be a qualitative case to support additional comparison retail which would complement rather than compete with existing floorspace in the city centre. However, this would be dependent upon demonstrating that such retail requirements could not first be accommodated in the city centre, in accordance with the NPPF.

9.6 Our assessment has identified that convenience provision in the core of Chelmsford City Centre is relatively weak and below the national average. Stores in the centre account for a falling proportion of convenience expenditure within Chelmsford's core zones and within the study area as a whole. The city centre does benefit however from the presence of the edge of centre Tesco store and provision will be boosted in the future by the introduction of the new Waitrose store and the ALDI store on Parkway. However, given the dominance of supermarkets outside of the city centre, we consider that further improvements could be achieved, subject to satisfying other requirements such as traffic and access.

9.7 The capacity assessment has identified sufficient capacity to support new convenience floorspace, which we have recommended is directed to Chelmsford City Centre and other Principal Neighbourhood Centres in the Chelmsford urban area in the first instance. We consider that Chelmer Waterside could provide an opportunity to meet a proportion of the identified convenience floorspace capacity, and help claw-back trade which is currently being lost to out-of-centre stores in the City Council Area. Any proposal for convenience retail floorspace in this area should accord with the relevant tests set out in the NPPF. In addition, it would need to be considered against the Council's wider aspirations for the site and other potential locations for new food retailing in both the city centre and the wider urban area that may come forward through the development of the Local Plan.

9.8 Subject to sensitive design, we consider that there could be some potential for convenience goods floorspace provision on this site that could help to satisfy the Council's long-standing aspiration for this site to act as an extension to the existing city centre shopping area. We have not assessed the viability or suitability of the site for accommodating a new foodstore, as such we consider that it would be premature for this report to recommend that the Council allocate this site for this purpose in the next Local Plan as this stage.

9.9 Should the Council seek to promote the site for convenience retail floorspace, development proposals should give particular focus to pedestrian and visual linkages with the city centre. Existing pedestrian linkages do exist, and these are already used by visitors to the city centre, although there is scope for improvement in order that some food retail floorspace acts an extension to the city centre and not as a stand-alone shopping destination. Whilst phasing of development on the site may be considered appropriate, there should be an overall vision for redevelopment of the site which makes best use of this site and balances other priorities in the City Council Area, such as residential.

Summary

- We do not consider it necessary for the Council to plan for additional comparison goods floorspace in the Chelmsford City Centre.
- Subject to sensitive design which promotes linkages to the city centre, we consider that Chelmer Waterside could provide an opportunity to meet a proportion of identified convenience floorspace capacity, and help claw-back trade which is currently being lost to out-of-centre stores in the City Council Area.
- Without further assessment of the suitability and viability of the site, we consider that it would be premature at this stage to allocate the site for foodstore development in the next Local Plan.
- Should the Council seek to promote the site for convenience retailing, development should be balanced with other priorities in the City Council Area (including residential) and satisfy other local policy requirements such as traffic and access.

10. Conclusions and Recommendations

10.1 This section summarises our headline conclusions on the qualitative and quantitative capacity for growth and change in retail provision across the City Council Area, and sets out recommendations to inform the Council's retail strategy over the plan period.

Global Capacity

10.2 Taking into account all planning commitments and adopting a constant market share approach, we have found capacity to support up to[12] 4,500sqm net large-format convenience floorspace in Chelmsford by 2020, growing to up to 6,700 sqm by 2025. Capacity grows significantly towards the latter end of the plan period, peaking at up to 11,500 sqm net by 2036.

10.3 Based on existing market shares, the concentration of existing residents, and the location of planned popularity growth we consider that convenience capacity identified for the Chelmsford urban area should be directed in the first instance to Chelmsford City Centre, and also complemented by additional provision in the Principal Neighbourhood Centres. Given the scale of the identified capacity in the short to medium term (i.e. up to 2024), this is likely to take the form of one new supermarket with smaller scale improvements to existing stores. In the longer term, growth in capacity could allow for further stores, although this is looking a considerable way into the future and we would recommend that a further update to the retail capacity situation is undertaken before deciding whether to plan for any further stores.

10.4 We have not identified any short term additional capacity to support new comparison goods retail floorspace in the City Council Area. This is due to the significant new retail floorspace planned as part of the Bond Street redevelopment in Chelmsford City Centre which will soak up short to medium term capacity. Even when assessing the potential for this new planned floorspace to generate an increased market share for Chelmsford, our

[12] All figures are stated as 'up to' amounts in light of the need to consider a potentially higher convenience goods market share for convenience goods shopping in South Woodham Ferrers

assessment has found that expenditure capacity to support new comparison goods floorspace will not occur until 2024 and beyond.

10.5 Although we have not identified any specific capacity in the City Council Area, this should not prevent an element of additional comparison goods floorspace coming forward in the City Council Area's centres where it reflects their role in the retail hierarchy, is in a town centre location, meets local needs, and qualitatively improves the vitality and viability of these centres.

10.6 We do not consider that there is any need to plan for additional retail warehousing in the City Council Area over the plan period. However, there may be a qualitative case to support additional comparison retail warehousing which would complement rather than compete with existing floorspace in the city centre. This would be dependent upon demonstrating that such retail requirements could not first be accommodated in the city centre, in accordance with the NPPF. Applications for retail development that is outside of an existing centre and not in accordance with the development plan will need to be assessed on their own merits and against the sequential and impact tests.

Chelmsford City Centre

10.7 Chelmsford City Centre remains a strong centre which performs well against the national average in key indicators. It achieves the highest level of retention of all the centres (and out-of-centre destinations) in the City Council Area for comparison goods, which demonstrates the popularity and strength of the city centre as a retail destination. The household survey results indicate that the centre attracts trade from across a wide area which extends beyond City Council Area boundaries, confirming that the city centre serves an import role in the wider regional hierarchy. The addition of John Lewis and wider Bond Street development should help ensure that the city centre maintains market shares and continues to attract trade and investment.

10.8 Our analysis shows that convenience provision in the centre is below average. The results of the household survey demonstrate that, collectively, stores are trading below expected benchmark levels. The Tesco on Springfield Road, provides an important complementary role to the city centre and helps encourage linked trips to other shops and services. Although household surveys tend to underestimate the performance of city centre stores, this may indicate a qualitative case to support new provision in the city centre to meet the needs of planned population growth and help claw back expenditure to the town centre from out-of-centre locations.

10.9 The centre will soon benefit from substantial redevelopment as part of the Bond Street redevelopment. The Council should promote improvements around the shopping area to help enhance connectivity, engender a sense of place in the city centre and foster linked trips to other parts of the city centre, ensuring that the entirety of the centre can capitalise on the additional attraction and trade which will be generated by redevelopment of Bond Street.

10.10 In terms of leisure development, and the eating/drinking offer in particular, research identifies reasonably strong growth in consumer expenditure in these sectors over the plan period. Published research consistently encourages a mix of uses to meet the full shopper experience in order to compete with neighbouring centres and the internet. We consider leisure uses in the Use Class A3, A4 and D2 categories should be actively encouraged in the centre provided they are developed in appropriately sited city centre locations and, where possible, are designed alongside high quality public realm developments in order to create a quality leisure experience.

10.11 We recommend that the Council continue to focus on wider management strategies for the Chelmsford, improving the existing retail areas and the environment, and encouraging a mix of city centre uses to create a 'social centre' which is not reliant on any one use or sector. This should include a diversity of city centre mix through daytime and evening eating/drinking, cinema, health type leisure facilities (yoga/pilates/gyms/personal training etc), snooker/pool halls, children's play/activity destinations, community facilities, libraries and crèche facilities, for example.

Recommendations

- Start to plan for the development of strategic sites which are suitable and capable of accommodating a proportion of identified retail capacity for convenience floorspace, and that will claw back trade from out-of-centre destinations and reinforce the city centre as a whole;

- Continue to promote the overall shopper and visitor 'experience' of the centre continuing to improve the environment, market town character and accessibility of the centre, and capitalising on additional trade and footfall associated with Bond Street redevelopment; and
- Continue to focus on wider management strategies which encourage a diversity of uses to create a 'social centre' which is not reliant on any one use or sector.

South Woodham Ferrers Town Centre

10.12 South Woodham Ferrers Town Centre is dominated by an Asda foodstore which forms an important anchor to the centre and supports a high proportion of service uses in the centre, which benefit from linked trips with the store. There is a limited range and selection of comparison retailers in the centre. Both the on-street and household surveys point towards a qualitative deficiency in comparison goods provision. The proportion of vacant units in the centre is below the national average.

10.13 The available survey data collected for this study indicates that the Asda store is trading above its company average benchmark level. This trading performance suggests that there will be a modest amount of surplus floorspace capacity in the short to medium term (1,000sq m net at 2020) and rising to circa 1,900sq m net by 2036. There may be opportunities to increase this level of capacity via an increase in the town's convenience goods market share although the scale of this increase can only be determined as and when specific proposals come forward.

10.14 Although we have not identified any specific capacity for comparison goods floorspace in South Woodham Ferrers Town Centre, this should not prevent an element of additional comparison goods floorspace coming forward where it reflects their role in the retail hierarchy, is in a town centre location, meets local needs, and qualitatively improves the vitality and viability of the centre.

Recommendations

- Modest levels of theoretical expenditure capacity to support convenience goods floorspace over the plan period and no specific quantitative capacity for comparison goods floorspace;

- Support greater diversity of uses in the centre, including comparison goods floorspace where it reflects the centre's role in the retail hierarchy, is in a town centre location, meets local needs, and qualitatively improves the vitality and viability of this centre; and
- Support environmental improvements in the centre to enhance integrity of the centre and foster a greater 'sense of place'.

Principal Neighbourhood Centres

10.15 Based on our analysis, the Principal Neighbourhood Centres are currently performing relatively well and in accordance with their role and position in the retail hierarchy. The Principal Neighbourhood Centres have a more limited range and scale of facilities and services than Chelmsford City Centre or South Woodham Ferrers Town Centre, however they play an important role in meeting the day-to-day needs of the local catchment and promote sustainable urban living. Adjacent community uses play an important role in generating activity and linked trips with existing shops and facilities.

10.16 In particular, our study has found that they play an important convenience goods role. This should be maintained. Where suitable sites are identified, we consider that there may be an opportunity to accommodate additional convenience floorspace in some of the centres and accommodate some of the retail capacity identified over the plan period.

Recommendations

- Principal Neighbourhood Centres should be encouraged to maintain their strong convenience goods offer. Where sites are available and suitable, consider provision of additional convenience floorspace to meet a proportion of retail need identified over the plan period.
- Consider investments in the public realm around Gloucester Avenue;
- Support greater diversity of uses in North Melbourne.

Retail Impact Thresholds

10.17 With respect to comparison goods floorspace, given the importance of this sector to the strength of retailing in Chelmsford City Centre, we consider that there is sufficient justification to support a locally-set threshold for comparison goods floorspace different to that set out within the NPPF (i.e. 2,500 sqm gross). Unrestricted comparison goods retail floorspace outside of the city centre has the potential to impose a competing retail destination and thus potentially harm both the health of the centre and investment within it. Therefore, in order to ensure that comparison goods retail proposals are properly assessed, we recommend that a threshold of 500sq m gross is imposed by the City Council. Whilst comparison goods floorspace is smaller in scale in some of the smaller neighbourhood centres and South Woodham Ferrers town centre, it is nevertheless important to the overall health and function of these centres and therefore this (500sq m gross) threshold should apply across the whole of the City Council administrative area (for proposals in edge and out of centre locations).

10.18 For convenience goods, we consider that there is also a justification for setting a lower impact threshold. With a trend for the development of smaller discount stores and the rise in popularity for convenience goods stores, even smaller foodstore proposals can have a harmful impact on defined centres, particularly those which are anchored by an existing foodstore. Therefore, we consider that the 500sq m gross threshold should also apply to proposals for convenience goods floorspace over this amount in edge and out of centre locations.

10.19 In order to maintain a degree of control over out of centre retail development, the Council could adopt a policy which acknowledges that, in normal circumstances, retail development below the NPPF threshold would not normally require an impact assessment but that, subject to the Council's discretion, an assessment may be required in certain circumstances, particularly where there may be concerns over i) cumulative impact; and/or ii) the role/health of nearby centres within the catchment of the proposal. Applicants should be encouraged to engage with the Council at an early stage to establish whether an impact assessment may be required.

Town Centre Frontage and Boundary Policies

10.20 The Local Plan should clearly identify the following retail areas in accordance with the definitions set out in Annex 2 of the NPPF:

- Primary Shopping Area (PSA);
- Primary Shopping Frontage (PSF);
- Secondary Shopping Frontage (SSF).

Chelmsford City Centre

10.21 The CTCAAP (2008) identifies a Primary Shopping Area, Primary Shopping Frontages and Secondary Shopping frontages across the centre. Following the implementation of the Bond Street redevelopment, we recommend that the entirety of the redevelopment is incorporated within the Primary Shopping Area and is identified as part of the Primary Shopping Frontage. We consider that there is no need to extend Secondary Shopping Frontages beyond what is already identified in the development plan. Likewise, we consider that there is no need to reduce the extent of these areas as we consider they accurately reflect the concentration of main city centre uses in the centre.

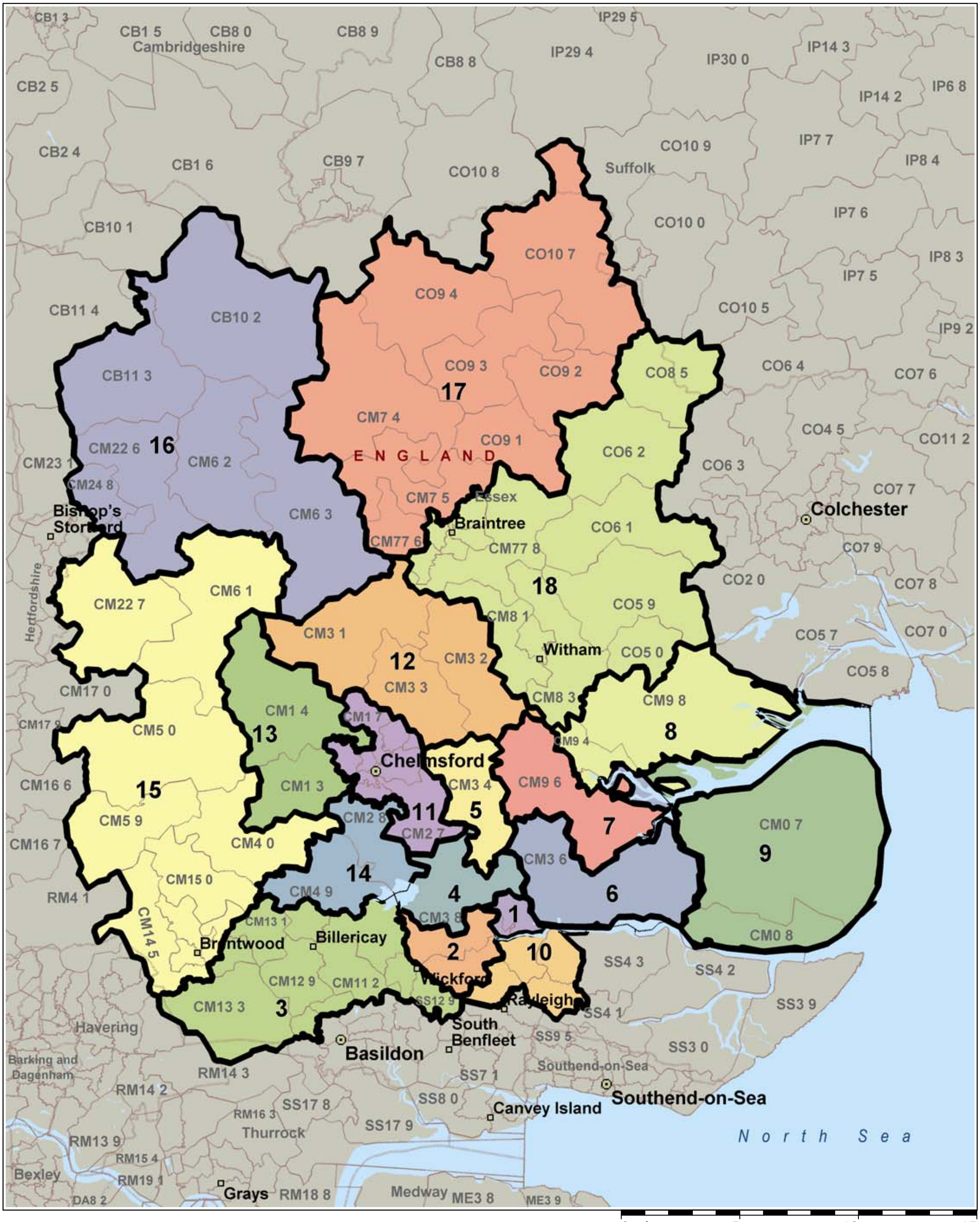
South Woodham Ferrers Town Centre

10.22 The Site Allocations DPD defines a Primary Shopping Frontage in South Woodham Ferrers Town Centre which we consider to be sufficient bearing in mind the size of the centre and its overall offer. There is also a Secondary Shopping Frontage in the centre, which we consider represents current provision in the centre. Together we consider that the PSF and SSF should comprise the PSA and form the extent of the 'city centre' for decision making purposes (e.g. when determining whether adjacent sites or edge or out of centre).

Plan 1

Composite Household Survey Area

COMBINED HOUSEHOLD SURVEY AREA



Plan 2

Map of On-Street Survey Locations, Chelmsford

On-Street Surveys, Chelmsford Town Centre

Key

★ Interviewer Location

Chelmsford Retail Capacity Study 2014

Plan 3

Map of On-Street Survey Locations, South Woodham Ferrers

Appendix I

Retail Capacity Forecasts

TABLE 1: POPULATION, BY ZONE

YEAR	ZONE																		TOTAL
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	
2015	16503	17345	97136	3040	9298	9768	11355	22497	16241	34706	87468	16066	21779	20809	79687	48876	49762	118439	680775
2020	17071	17928	100579	3142	9646	10044	11628	23096	16632	35539	90519	16692	22562	21554	83557	52359	51766	123482	707796
2025	17631	18518	104119	3242	9984	10362	11931	23779	17072	36543	93496	17312	23334	22299	87587	55690	53757	128423	735079
2030	18158	19082	107515	3337	10313	10669	12229	24442	17496	37505	96240	17902	24043	23001	91468	58588	55555	132878	760421
2033	18455	19405	109506	3392	10487	10841	12392	24805	17725	38034	97805	18226	24433	23392	93659	60120	56564	135385	774626
2036	18752	19728	111497	3447	10661	11013	12555	25168	17954	38563	99370	18550	24823	23783	95850	61652	57573	137892	788831

Notes: population data for each zone, for 2015-2036, provided by Experian (June 2015)

TABLE 2a: PER CAPITA RETAIL EXPENDITURE BY ZONE, 2015

GOODS CATEGORY	ZONE																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Convenience Goods	2146	2140	2227	2481	2524	2354	2161	2157	2164	2102	2034	2315	2103	2272	2239	2140	2208	2050
Clothes, footwear and fashion	907	793	914	1043	1099	963	846	830	796	818	813	960	831	943	935	902	839	791
Clothing materials and garments per Person	783	675	782	890	943	827	723	708	680	700	698	821	711	809	801	773	716	677
Shoes and other footwear per Person	125	119	132	153	156	136	124	122	117	119	115	139	120	134	134	129	123	115
Furniture, floorcoverings and textiles	474	407	453	549	589	537	455	447	443	422	422	507	422	477	474	465	456	421
Furniture and furnishings; carpets and other floor coverings per Persor	340	294	323	392	408	389	323	320	311	307	302	366	306	336	334	333	327	302
Household textiles per Person	134	113	129	157	180	148	131	126	132	115	120	141	116	141	140	132	128	119
DIY & hardware	144	168	175	247	232	212	179	180	192	168	145	209	163	188	191	190	195	159
Gardens, plants and flowers per Person	53	67	69	103	95	83	69	69	71	66	54	83	64	74	76	75	75	59
10% of Non-Durable household goods per Person	7	8	8	10	10	9	8	8	8	8	7	9	8	8	9	8	8	7
Small tools and miscellaneous accessories	58	65	70	94	92	82	71	71	77	67	62	83	67	76	75	76	77	67
Major tools and equipment per Person	5	7	7	10	9	10	7	8	9	7	5	9	6	8	8	8	9	6
Materials for maintenance and repair of the dwelling per Person	21	22	21	31	27	29	24	25	27	21	17	26	19	22	23	23	26	21
Domestic appliances and utensils	211	191	211	260	259	238	203	197	194	196	195	231	208	219	223	216	210	187
Glassware, tableware and household utensils per Person	96	79	94	117	112	105	88	88	87	85	87	103	92	96	101	97	91	81
Small electrical household appliances per Person	16	14	15	15	16	14	14	14	13	15	15	15	14	15	14	14	14	14
Major household appliances (electric or not) per Person	99	97	102	127	130	119	100	96	95	96	93	112	102	108	107	104	105	92
TV, hi fi, photographic and computer goods	283	285	335	402	399	376	312	317	304	291	313	375	332	336	359	347	338	310
Audio-visual, photographic and information processing equipment p	283	285	335	402	399	376	312	317	304	291	313	375	332	336	359	347	338	310
Books, CDs and DVDs	190	194	219	257	280	229	203	200	199	199	199	231	204	230	236	219	209	190
Books and stationery per Person	117	122	133	160	176	141	127	123	123	125	120	142	122	143	148	133	125	113
Recording media per Person	73	72	86	97	104	88	75	77	76	74	79	89	82	87	88	86	84	77
Health and beauty goods	532	478	515	534	630	554	487	470	486	485	458	527	476	536	526	488	474	441
Appliances for personal care per Person	379	336	366	374	441	370	341	326	319	338	331	366	333	371	371	343	326	316
Medical goods and other pharmaceutical products per Person	101	96	104	108	129	122	98	96	106	101	89	111	100	113	108	100	97	85
Therapeutic appliances and equipment per Person	51	46	45	51	60	63	48	48	62	45	38	50	42	52	47	45	50	41
Recreational and luxury goods	635	589	674	790	806	688	619	619	591	589	610	703	626	680	688	667	646	607
Games, toys and hobbies; sport and camping; musical instruments pe	362	346	388	437	449	376	357	356	336	342	358	391	359	389	390	379	366	361
Jewellery, clocks and watches per Person	127	93	126	132	168	125	101	102	97	101	105	127	112	129	126	119	105	97
Other personal effects per Person	66	64	68	74	78	73	60	60	58	64	63	69	64	69	69	65	60	56
Bicycles per Person	23	18	21	24	23	21	20	19	17	19	23	22	21	21	24	21	20	19
Pets and related products per Person	57	69	70	122	88	92	80	81	83	63	61	93	70	71	78	83	95	73

Notes: base 2013 per capita retail expenditure obtained from Experian and projected forward using forecasts within Experian's Retail Planner Briefing Note 12.1 (2014)

TABLE 2b: PER CAPITA RETAIL EXPENDITURE BY ZONE, 2020

GOODS CATEGORY	ZONE																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Convenience Goods	2176	2170	2258	2516	2559	2387	2191	2187	2194	2132	2062	2348	2133	2304	2271	2170	2239	2079
Clothes, footwear and fashion	1017	889	1024	1169	1232	1079	948	930	892	917	911	1076	931	1057	1048	1011	940	887
Clothing materials and garments per Person	877	756	876	997	1057	927	810	794	761	784	782	920	797	906	898	866	802	758
Shoes and other footwear per Person	140	133	148	172	175	152	138	136	131	133	129	156	134	150	150	145	137	129
Furniture, floorcoverings and textiles	531	456	507	615	660	601	509	501	496	473	473	568	473	534	531	521	510	471
Furniture and furnishings; carpets and other floor coverings per Persor	381	330	362	439	457	436	362	359	348	344	338	410	343	376	374	373	367	338
Household textiles per Person	150	127	145	176	202	165	147	142	148	129	134	158	130	158	157	148	144	133
DIY & hardware	161	188	196	277	260	238	200	202	215	188	162	235	183	211	214	213	218	178
Gardens, plants and flowers per Person	59	75	77	116	106	93	77	77	80	74	61	93	71	83	85	84	84	66
10% of Non-Durable household goods per Person	8	9	9	11	11	10	9	9	9	9	8	10	9	9	10	9	9	8
Small tools and miscellaneous accessories	65	72	79	105	103	92	80	80	87	75	69	93	75	85	84	85	87	75
Major tools and equipment per Person	5	8	8	11	10	11	8	9	10	8	5	10	6	9	9	9	10	6
Materials for maintenance and repair of the dwelling per Person	24	25	24	35	30	32	27	28	30	24	19	29	22	25	26	26	29	24
Domestic appliances and utensils	237	214	237	291	290	267	227	221	217	220	218	258	234	245	250	242	236	210
Glassware, tableware and household utensils per Person	107	89	105	131	125	118	98	98	97	95	97	116	103	107	114	109	102	91
Small electrical household appliances per Person	18	16	17	17	18	16	16	15	14	17	17	17	16	17	16	16	16	16
Major household appliances (electric or not) per Person	111	109	115	143	146	133	112	107	106	107	104	125	115	121	120	117	118	103
TV, hi fi, photographic and computer goods	317	319	375	451	447	422	349	355	341	326	350	421	372	376	402	389	378	347
Audio-visual, photographic and information processing equipment p	317	319	375	451	447	422	349	355	341	326	350	421	372	376	402	389	378	347
Books, CDs and DVDs	213	217	245	288	314	256	227	224	223	223	223	258	228	257	264	245	235	213
Books and stationery per Person	131	136	149	180	197	158	143	137	137	140	134	159	136	160	165	149	141	127
Recording media per Person	82	81	96	108	117	98	84	87	85	83	89	99	92	97	98	96	94	87
Health and beauty goods	596	535	577	598	706	621	546	527	545	543	513	590	533	600	589	547	531	494
Appliances for personal care per Person	425	376	410	420	494	414	382	366	357	378	371	410	373	415	415	384	366	354
Medical goods and other pharmaceutical products per Person	114	107	117	121	145	136	110	107	119	114	99	124	112	127	121	112	109	95
Therapeutic appliances and equipment per Person	57	52	51	57	67	70	54	54	69	51	42	56	48	58	53	51	56	45
Recreational and luxury goods	712	660	755	885	903	771	693	693	662	660	683	787	702	762	771	747	723	680
Games, toys and hobbies; sport and camping; musical instruments pe	406	387	435	490	503	422	400	399	376	383	401	438	402	436	437	425	410	404
Jewellery, clocks and watches per Person	143	104	142	148	188	141	114	115	108	114	118	143	125	145	142	133	118	109
Other personal effects per Person	74	71	76	83	88	82	67	67	65	71	70	78	71	78	78	72	67	63
Bicycles per Person	26	21	24	27	26	24	23	22	19	22	26	25	24	24	27	24	23	22
Pets and related products per Person	64	77	79	136	98	103	90	91	93	70	68	104	79	80	88	93	106	82

Notes: base 2013 per capita retail expenditure obtained from Experian and projected forward using forecasts within Experian's Retail Planner Briefing Note 12.1 (2014)

TABLE 2c: PER CAPITA RETAIL EXPENDITURE BY ZONE, 2025

GOODS CATEGORY	ZONE																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Convenience Goods	2236	2230	2320	2585	2629	2452	2251	2247	2254	2190	2118	2412	2191	2367	2333	2230	2301	2136
Clothes, footwear and fashion	1191	1042	1200	1370	1443	1265	1111	1090	1045	1074	1067	1261	1091	1238	1228	1185	1101	1039
Clothing materials and garments per Person	1028	886	1026	1168	1238	1086	949	930	892	919	916	1078	934	1062	1052	1015	940	888
Shoes and other footwear per Person	163	156	174	201	205	179	162	160	153	156	151	182	157	176	176	170	161	151
Furniture, floorcoverings and textiles	622	535	594	721	773	705	597	587	582	554	554	665	554	626	622	611	598	552
Furniture and furnishings; carpets and other floor coverings per Persor	446	386	424	514	536	511	424	421	408	403	397	480	402	441	438	437	430	397
Household textiles per Person	176	148	170	207	237	194	172	166	174	151	157	185	152	185	184	174	169	156
DIY & hardware	189	220	229	324	304	279	234	237	252	220	190	275	214	247	251	250	256	209
Gardens, plants and flowers per Person	70	87	90	136	124	109	90	90	94	86	71	109	84	98	100	99	99	77
10% of Non-Durable household goods per Person	9	10	10	13	13	11	10	10	10	10	9	11	10	10	11	10	10	9
Small tools and miscellaneous accessories	76	85	92	123	120	108	94	94	101	87	81	109	87	100	99	100	101	87
Major tools and equipment per Person	6	9	9	13	11	13	9	10	11	9	6	11	8	10	10	10	11	8
Materials for maintenance and repair of the dwelling per Person	28	29	28	41	35	38	32	33	35	28	23	34	25	29	30	30	34	28
Domestic appliances and utensils	277	251	277	341	340	313	266	258	255	257	256	303	274	288	293	284	276	246
Glassware, tableware and household utensils per Person	125	104	123	153	147	138	115	115	114	112	114	136	120	125	133	128	119	106
Small electrical household appliances per Person	22	19	20	20	22	19	19	18	16	20	20	20	19	20	19	19	19	19
Major household appliances (electric or not) per Person	131	128	134	167	171	156	132	125	124	125	122	147	134	142	141	137	138	120
TV, hi fi, photographic and computer goods	371	374	440	528	523	494	409	416	399	381	411	493	436	441	471	456	443	407
Audio-visual, photographic and information processing equipment p	371	374	440	528	523	494	409	416	399	381	411	493	436	441	471	456	443	407
Books, CDs and DVDs	250	255	288	337	367	300	266	262	261	261	261	303	267	302	309	288	275	250
Books and stationery per Person	153	160	175	210	231	185	167	161	161	163	157	186	160	188	194	175	165	148
Recording media per Person	96	95	113	127	137	115	99	101	100	98	104	117	108	114	115	113	110	101
Health and beauty goods	698	627	677	701	827	727	640	617	639	636	601	692	625	703	691	641	622	579
Appliances for personal care per Person	498	441	480	492	579	485	447	428	418	443	435	480	437	487	487	450	428	414
Medical goods and other pharmaceutical products per Person	133	125	137	142	170	160	129	125	139	133	117	146	132	148	142	132	128	112
Therapeutic appliances and equipment per Person	67	61	60	67	79	82	63	63	81	60	49	66	56	68	62	60	66	53
Recreational and luxury goods	834	773	884	1036	1058	903	812	812	775	773	801	922	822	893	903	876	848	797
Games, toys and hobbies; sport and camping; musical instruments pe	475	454	509	574	589	494	469	468	441	449	470	513	471	511	512	498	480	474
Jewellery, clocks and watches per Person	167	122	166	174	220	165	133	134	127	133	138	167	147	170	166	156	138	128
Other personal effects per Person	86	84	89	98	103	96	79	79	76	84	82	91	84	91	91	85	79	73
Bicycles per Person	30	24	28	32	30	28	27	25	23	25	30	29	28	28	32	28	27	25
Pets and related products per Person	75	90	92	160	115	120	105	106	109	82	80	122	92	94	103	109	124	96

Notes: base 2013 per capita retail expenditure obtained from Experian and projected forward using forecasts within Experian's Retail Planner Briefing Note 12.1 (2014)

TABLE 2d: PER CAPITA RETAIL EXPENDITURE BY ZONE, 2030

GOODS CATEGORY	ZONE																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Convenience Goods	2297	2291	2383	2655	2701	2519	2312	2308	2315	2250	2176	2478	2251	2432	2397	2291	2363	2194
Clothes, footwear and fashion	1405	1229	1416	1616	1703	1492	1311	1285	1233	1268	1259	1487	1287	1460	1448	1398	1299	1226
Clothing materials and garments per Person	1212	1045	1211	1378	1460	1281	1120	1097	1052	1084	1081	1272	1102	1253	1241	1197	1109	1048
Shoes and other footwear per Person	193	184	205	238	242	211	191	188	181	184	178	215	185	208	208	200	190	178
Furniture, floorcoverings and textiles	734	631	701	851	912	831	704	692	686	653	653	785	653	738	734	720	706	652
Furniture and furnishings; carpets and other floor coverings per Persor	526	456	501	607	632	602	501	496	481	475	468	567	474	520	517	516	507	468
Household textiles per Person	208	175	200	244	280	229	203	196	205	178	185	218	179	218	217	205	199	184
DIY & hardware	223	260	271	383	359	329	277	280	297	260	224	324	253	291	296	294	302	247
Gardens, plants and flowers per Person	82	103	106	160	146	129	106	106	111	102	84	129	99	115	118	117	117	91
10% of Non-Durable household goods per Person	10	12	12	15	15	13	12	12	12	12	10	13	12	12	13	12	12	10
Small tools and miscellaneous accessories	90	100	109	145	142	127	111	111	120	103	96	129	103	118	117	118	120	103
Major tools and equipment per Person	7	10	10	15	13	15	10	12	13	10	7	13	9	12	12	12	13	9
Materials for maintenance and repair of the dwelling per Person	33	34	33	48	42	45	37	39	42	33	27	40	30	34	36	36	40	33
Domestic appliances and utensils	327	296	327	402	401	369	314	305	300	303	302	357	323	339	345	335	326	290
Glassware, tableware and household utensils per Person	148	123	145	181	173	163	136	136	135	132	135	160	142	148	157	151	141	126
Small electrical household appliances per Person	25	22	24	24	25	22	22	21	19	24	24	24	22	24	22	22	22	22
Major household appliances (electric or not) per Person	154	151	158	197	202	184	155	148	146	148	143	173	158	167	166	161	163	142
TV, hi fi, photographic and computer goods	438	441	519	623	617	583	483	490	471	450	484	581	514	520	556	538	523	480
Audio-visual, photographic and information processing equipment p	438	441	519	623	617	583	483	490	471	450	484	581	514	520	556	538	523	480
Books, CDs and DVDs	294	300	339	398	433	354	314	309	308	308	308	357	315	356	365	339	324	294
Books and stationery per Person	181	188	206	248	272	218	197	190	190	193	185	220	188	221	229	206	194	175
Recording media per Person	114	112	133	149	161	136	117	120	118	115	123	138	127	135	136	133	130	120
Health and beauty goods	824	740	798	827	976	858	755	728	753	750	709	816	737	830	815	756	734	683
Appliances for personal care per Person	587	520	567	580	683	572	528	505	493	523	513	567	516	574	574	531	505	489
Medical goods and other pharmaceutical products per Person	157	148	161	167	200	188	152	148	164	157	138	172	155	175	167	155	151	132
Therapeutic appliances and equipment per Person	79	72	70	79	93	97	75	75	96	70	58	78	66	81	73	70	78	63
Recreational and luxury goods	984	912	1043	1223	1248	1066	958	958	915	912	945	1088	970	1054	1066	1033	1000	940
Games, toys and hobbies; sport and camping; musical instruments pe	561	535	601	677	695	583	553	552	520	529	555	605	556	602	604	587	567	559
Jewellery, clocks and watches per Person	197	143	196	205	260	194	157	158	149	157	163	197	173	200	196	184	163	151
Other personal effects per Person	102	99	105	115	121	114	93	93	90	99	97	108	99	108	108	100	93	87
Bicycles per Person	36	28	33	37	36	33	31	30	27	30	36	34	33	33	37	33	31	30
Pets and related products per Person	88	106	109	188	136	142	124	126	129	97	94	143	109	111	121	129	146	114

Notes: base 2013 per capita retail expenditure obtained from Experian and projected forward using forecasts within Experian's Retail Planner Briefing Note 12.1 (2014)

TABLE 2e: PER CAPITA RETAIL EXPENDITURE BY ZONE, 2036

GOODS CATEGORY	ZONE																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Convenience Goods	2378	2372	2468	2750	2797	2609	2395	2390	2398	2330	2254	2566	2331	2518	2482	2372	2447	2272
Clothes, footwear and fashion	1731	1513	1743	1990	2097	1837	1615	1583	1519	1561	1550	1832	1585	1799	1784	1721	1600	1510
Clothing materials and garments per Person	1493	1287	1491	1697	1799	1578	1379	1351	1296	1335	1331	1567	1357	1543	1528	1475	1366	1291
Shoes and other footwear per Person	237	226	252	293	298	260	236	232	223	226	219	265	228	256	256	247	234	219
Furniture, floorcoverings and textiles	904	777	863	1048	1123	1024	867	852	845	805	805	967	805	909	904	887	869	803
Furniture and furnishings; carpets and other floor coverings per Persor	648	561	617	747	779	742	617	611	593	585	576	698	584	641	637	635	624	576
Household textiles per Person	256	215	247	300	344	282	250	241	252	219	228	269	221	269	267	252	245	226
DIY & hardware	274	320	333	471	442	405	341	344	366	320	276	399	311	359	365	363	372	304
Gardens, plants and flowers per Person	101	127	131	197	180	158	131	131	136	125	103	158	122	142	145	144	144	112
10% of Non-Durable household goods per Person	13	15	15	18	18	17	15	15	15	15	13	17	15	15	17	15	15	13
Small tools and miscellaneous accessories	110	123	134	179	175	156	136	136	147	127	118	158	127	145	144	145	147	127
Major tools and equipment per Person	9	13	13	18	17	18	13	15	17	13	9	17	11	15	15	15	17	11
Materials for maintenance and repair of the dwelling per Person	41	42	41	59	52	55	46	48	52	41	33	50	37	42	44	44	50	41
Domestic appliances and utensils	403	365	403	495	493	455	387	376	370	374	372	440	398	418	425	412	401	357
Glassware, tableware and household utensils per Person	182	151	179	223	214	201	168	168	166	162	166	197	175	182	193	186	173	155
Small electrical household appliances per Person	31	28	29	29	31	28	28	26	24	29	29	29	28	29	28	28	28	28
Major household appliances (electric or not) per Person	190	186	195	243	249	226	191	182	180	182	177	214	195	206	204	199	201	175
TV, hi fi, photographic and computer goods	539	543	639	768	760	718	595	604	580	554	596	716	633	641	685	663	644	591
Audio-visual, photographic and information processing equipment p	539	543	639	768	760	718	595	604	580	554	596	716	633	641	685	663	644	591
Books, CDs and DVDs	363	370	418	490	534	436	387	381	379	379	379	440	388	438	449	418	399	363
Books and stationery per Person	223	232	254	306	335	269	243	234	234	237	228	271	232	272	282	254	239	215
Recording media per Person	140	138	164	184	199	168	144	147	145	142	151	169	156	166	168	164	160	147
Health and beauty goods	1014	911	983	1018	1202	1057	930	897	928	924	873	1005	908	1022	1003	932	904	841
Appliances for personal care per Person	724	641	698	714	841	705	650	622	608	644	631	698	635	707	707	654	622	602
Medical goods and other pharmaceutical products per Person	193	182	199	206	247	232	188	182	203	193	169	212	191	215	206	191	186	162
Therapeutic appliances and equipment per Person	98	88	87	98	114	120	92	92	118	87	72	96	81	99	90	87	96	77
Recreational and luxury goods	1211	1123	1285	1506	1537	1313	1180	1180	1127	1123	1164	1340	1195	1298	1313	1272	1232	1158
Games, toys and hobbies; sport and camping; musical instruments pe	690	659	740	834	856	718	681	679	641	652	683	746	685	742	744	724	698	689
Jewellery, clocks and watches per Person	243	177	241	252	320	239	193	195	184	193	201	243	214	247	241	226	201	186
Other personal effects per Person	125	122	129	142	149	140	114	114	110	122	120	133	122	133	133	123	114	107
Bicycles per Person	44	35	41	46	44	41	39	37	33	37	44	42	41	41	46	41	39	37
Pets and related products per Person	109	131	134	232	168	175	153	155	158	120	116	177	134	136	149	158	180	140

Notes: base 2013 per capita retail expenditure obtained from Experian and projected forward using forecasts within Experian's Retail Planner Briefing Note 12.1 (2014)

TABLE 3a: TOTAL RETAIL EXPENDITURE BY ZONE, 2015

GOODS CATEGORY	ZONE 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	TOTAL
Convenience Goods	£35.4	£37.1	£216.3	£7.5	£23.5	£23.0	£24.5	£48.5	£35.1	£73.0	£177.9	£37.2	£45.8	£47.3	£178.5	£104.6	£109.9	£242.8	£1,467.9
Clothes, footwear and fashion	£15.0	£13.8	£88.8	£3.2	£10.2	£9.4	£9.6	£18.7	£12.9	£28.4	£71.1	£15.4	£18.1	£19.6	£74.5	£44.1	£41.7	£93.7	£588.3
Clothing materials and garments per Person	£12.9	£11.7	£75.9	£2.7	£8.8	£8.1	£8.2	£15.9	£11.0	£24.3	£61.0	£13.2	£15.5	£16.8	£63.8	£37.8	£35.6	£80.1	£503.5
Shoes and other footwear per Person	£2.1	£2.1	£12.8	£0.5	£1.5	£1.3	£1.4	£2.7	£1.9	£4.1	£10.0	£2.2	£2.6	£2.8	£10.7	£6.3	£6.1	£13.6	£84.8
Furniture, floorcoverings and textiles	£7.8	£7.1	£44.0	£1.7	£5.5	£5.2	£5.2	£10.1	£7.2	£14.6	£36.9	£8.1	£9.2	£9.9	£37.8	£22.7	£22.7	£49.8	£305.5
Furniture and furnishings; carpets and other floor coverings per Perso	£5.6	£5.1	£31.4	£1.2	£3.8	£3.8	£3.7	£7.2	£5.0	£10.7	£26.4	£5.9	£6.7	£7.0	£26.6	£16.3	£16.3	£35.8	£218.4
Household textiles per Person	£2.2	£2.0	£12.6	£0.5	£1.7	£1.4	£1.5	£2.8	£2.1	£4.0	£10.5	£2.3	£2.5	£2.9	£11.2	£6.5	£6.4	£14.1	£87.1
DIY & hardware	£2.4	£2.9	£17.0	£0.8	£2.2	£2.1	£2.0	£4.1	£3.1	£5.8	£12.7	£3.4	£3.6	£3.9	£15.2	£9.3	£9.7	£18.9	£118.9
Gardens, plants and flowers per Person	£0.9	£1.2	£6.7	£0.3	£0.9	£0.8	£0.8	£1.5	£1.2	£2.3	£4.7	£1.3	£1.4	£1.5	£6.1	£3.7	£3.7	£7.0	£45.9
10% of Non-Durable household goods per Person	£0.1	£0.1	£0.8	£0.0	£0.1	£0.1	£0.1	£0.2	£0.1	£0.3	£0.6	£0.1	£0.2	£0.2	£0.7	£0.4	£0.4	£0.8	£5.2
Small tools and miscellaneous accessories	£1.0	£1.1	£6.8	£0.3	£0.9	£0.8	£0.8	£1.6	£1.3	£2.3	£5.4	£1.3	£1.5	£1.6	£6.0	£3.7	£3.8	£7.9	£48.1
Major tools and equipment per Person	£0.1	£0.1	£0.7	£0.0	£0.1	£0.1	£0.1	£0.2	£0.1	£0.2	£0.4	£0.1	£0.1	£0.2	£0.6	£0.4	£0.4	£0.7	£4.6
Materials for maintenance and repair of the dwelling per Person	£0.4	£0.4	£2.1	£0.1	£0.3	£0.3	£0.3	£0.6	£0.4	£0.7	£1.5	£0.4	£0.4	£0.5	£1.8	£1.1	£1.3	£2.5	£15.1
Domestic appliances and utensils	£3.5	£3.3	£20.5	£0.8	£2.4	£2.3	£2.3	£4.4	£3.2	£6.8	£17.1	£3.7	£4.5	£4.6	£17.8	£10.6	£10.5	£22.2	£140.4
Glassware, tableware and household utensils per Person	£1.6	£1.4	£9.1	£0.4	£1.0	£1.0	£1.0	£2.0	£1.4	£2.9	£7.6	£1.7	£2.0	£2.0	£8.1	£4.8	£4.5	£9.6	£62.0
Small electrical household appliances per Person	£0.3	£0.3	£1.5	£0.0	£0.2	£0.1	£0.2	£0.3	£0.2	£0.5	£1.4	£0.2	£0.3	£0.3	£1.2	£0.7	£0.7	£1.7	£10.1
Major household appliances (electric or not) per Person	£1.6	£1.7	£9.9	£0.4	£1.2	£1.2	£1.1	£2.1	£1.5	£3.3	£8.1	£1.8	£2.2	£2.2	£8.5	£5.1	£5.2	£10.9	£68.3
TV, hi fi, photographic and computer goods	£4.7	£4.9	£32.5	£1.2	£3.7	£3.7	£3.5	£7.1	£4.9	£10.1	£27.4	£6.0	£7.2	£7.0	£28.6	£17.0	£16.8	£36.7	£223.1
Audio-visual, photographic and information processing equipment p	£4.7	£4.9	£32.5	£1.2	£3.7	£3.7	£3.5	£7.1	£4.9	£10.1	£27.4	£6.0	£7.2	£7.0	£28.6	£17.0	£16.8	£36.7	£223.1
Books, CDs and DVDs	£3.1	£3.4	£21.3	£0.8	£2.6	£2.2	£2.3	£4.5	£3.2	£6.9	£17.4	£3.7	£4.4	£4.8	£18.8	£10.7	£10.4	£22.5	£143.1
Books and stationery per Person	£1.9	£2.1	£12.9	£0.5	£1.6	£1.4	£1.4	£2.8	£2.0	£4.3	£10.5	£2.3	£2.6	£3.0	£11.8	£6.5	£6.2	£13.4	£87.3
Recording media per Person	£1.2	£1.3	£8.3	£0.3	£1.0	£0.9	£0.9	£1.7	£1.2	£2.6	£6.9	£1.4	£1.8	£1.8	£7.0	£4.2	£4.2	£9.1	£55.8
Health and beauty goods	£8.8	£8.3	£50.1	£1.6	£5.9	£5.4	£5.5	£10.6	£7.9	£16.8	£40.0	£8.5	£10.4	£11.1	£41.9	£23.9	£23.6	£52.2	£332.5
Appliances for personal care per Person	£6.3	£5.8	£35.5	£1.1	£4.1	£3.6	£3.9	£7.3	£5.2	£11.7	£29.0	£5.9	£7.3	£7.7	£29.5	£16.7	£16.2	£37.4	£234.3
Medical goods and other pharmaceutical products per Person	£1.7	£1.7	£10.1	£0.3	£1.2	£1.2	£1.1	£2.1	£1.7	£3.5	£7.8	£1.8	£2.2	£2.3	£8.6	£4.9	£4.9	£10.1	£67.2
Therapeutic appliances and equipment per Person	£0.8	£0.8	£4.4	£0.2	£0.6	£0.6	£0.5	£1.1	£1.0	£1.6	£3.3	£0.8	£0.9	£1.1	£3.8	£2.2	£2.5	£4.8	£31.0
Recreational and luxury goods	£10.5	£10.2	£65.4	£2.4	£7.5	£6.7	£7.0	£13.9	£9.6	£20.4	£53.4	£11.3	£13.6	£14.2	£54.8	£32.6	£32.1	£71.9	£437.6
Games, toys and hobbies; sport and camping; musical instruments p	£6.0	£6.0	£37.7	£1.3	£4.2	£3.7	£4.1	£8.0	£5.5	£11.9	£31.3	£6.3	£7.8	£8.1	£31.1	£18.5	£18.2	£42.8	£252.3
Jewellery, clocks and watches per Person	£2.1	£1.6	£12.3	£0.4	£1.6	£1.2	£1.2	£2.3	£1.6	£3.5	£9.2	£2.0	£2.4	£2.7	£10.1	£5.8	£5.2	£11.5	£76.8
Other personal effects per Person	£1.1	£1.1	£6.6	£0.2	£0.7	£0.7	£0.7	£1.3	£0.9	£2.2	£5.5	£1.1	£1.4	£1.4	£5.5	£3.2	£3.0	£6.6	£43.3
Bicycles per Person	£0.4	£0.3	£2.1	£0.1	£0.2	£0.2	£0.2	£0.4	£0.3	£0.7	£2.0	£0.4	£0.5	£0.4	£1.9	£1.0	£1.0	£2.3	£14.4
Pets and related products per Person	£0.9	£1.2	£6.8	£0.4	£0.8	£0.9	£0.9	£1.8	£1.3	£2.2	£5.3	£1.5	£1.5	£1.5	£6.2	£4.1	£4.7	£8.7	£50.8

Notes: total expenditure calculated by multiplying population (Table 1) with per capita expenditure (Table 2) for each year.

TABLE 3b: TOTAL RETAIL EXPENDITURE BY ZONE, 2020

GOODS CATEGORY	ZONE																		TOTAL
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	
Convenience Goods	£37.2	£38.9	£227.1	£7.9	£24.7	£24.0	£25.5	£50.5	£36.5	£75.8	£186.7	£39.2	£48.1	£49.7	£189.8	£113.6	£115.9	£256.7	£1,547.7
Clothes, footwear and fashion	£17.4	£15.9	£103.0	£3.7	£11.9	£10.8	£11.0	£21.5	£14.8	£32.6	£82.4	£18.0	£21.0	£22.8	£87.6	£52.9	£48.6	£109.5	£685.4
Clothing materials and garments per Person	£15.0	£13.6	£88.1	£3.1	£10.2	£9.3	£9.4	£18.3	£12.7	£27.9	£70.8	£15.4	£18.0	£19.5	£75.0	£45.4	£41.5	£93.6	£586.7
Shoes and other footwear per Person	£2.4	£2.4	£14.9	£0.5	£1.7	£1.5	£1.6	£3.1	£2.2	£4.7	£11.6	£2.6	£3.0	£3.2	£12.6	£7.6	£7.1	£15.9	£98.7
Furniture, floorcoverings and textiles	£9.1	£8.2	£51.0	£1.9	£6.4	£6.0	£5.9	£11.6	£8.3	£16.8	£42.8	£9.5	£10.7	£11.5	£44.4	£27.3	£26.4	£58.2	£355.9
Furniture and furnishings; carpets and other floor coverings per Perso	£6.5	£5.9	£36.4	£1.4	£4.4	£4.4	£4.2	£8.3	£5.8	£12.2	£30.6	£6.8	£7.7	£8.1	£31.3	£19.5	£19.0	£41.8	£254.4
Household textiles per Person	£2.6	£2.3	£14.6	£0.6	£2.0	£1.7	£1.7	£3.3	£2.5	£4.6	£12.1	£2.6	£2.9	£3.4	£13.1	£7.8	£7.4	£16.4	£101.4
DIY & hardware	£2.8	£3.4	£19.7	£0.9	£2.5	£2.4	£2.3	£4.7	£3.6	£6.7	£14.7	£3.9	£4.1	£4.5	£17.9	£11.2	£11.3	£22.0	£138.5
Gardens, plants and flowers per Person	£1.0	£1.3	£7.7	£0.4	£1.0	£0.9	£0.9	£1.8	£1.3	£2.6	£5.5	£1.6	£1.6	£1.8	£7.1	£4.4	£4.4	£8.1	£53.5
10% of Non-Durable household goods per Person	£0.1	£0.2	£0.9	£0.0	£0.1	£0.1	£0.1	£0.2	£0.1	£0.3	£0.7	£0.2	£0.2	£0.2	£0.8	£0.5	£0.4	£0.9	£6.0
Small tools and miscellaneous accessories	£1.1	£1.3	£7.9	£0.3	£1.0	£0.9	£0.9	£1.8	£1.4	£2.7	£6.3	£1.6	£1.7	£1.8	£7.0	£4.5	£4.5	£9.2	£56.0
Major tools and equipment per Person	£0.1	£0.1	£0.8	£0.0	£0.1	£0.1	£0.1	£0.2	£0.2	£0.3	£0.5	£0.2	£0.1	£0.2	£0.7	£0.5	£0.5	£0.8	£5.4
Materials for maintenance and repair of the dwelling per Person	£0.4	£0.4	£2.4	£0.1	£0.3	£0.3	£0.3	£0.6	£0.5	£0.8	£1.8	£0.5	£0.5	£0.5	£2.2	£1.4	£1.5	£2.9	£17.5
Domestic appliances and utensils	£4.0	£3.8	£23.8	£0.9	£2.8	£2.7	£2.6	£5.1	£3.6	£7.8	£19.8	£4.3	£5.3	£5.3	£20.9	£12.7	£12.2	£25.9	£163.6
Glassware, tableware and household utensils per Person	£1.8	£1.6	£10.6	£0.4	£1.2	£1.2	£1.1	£2.3	£1.6	£3.4	£8.8	£1.9	£2.3	£2.3	£9.5	£5.7	£5.3	£11.2	£72.2
Small electrical household appliances per Person	£0.3	£0.3	£1.7	£0.1	£0.2	£0.2	£0.2	£0.3	£0.2	£0.6	£1.6	£0.3	£0.4	£0.4	£1.4	£0.8	£0.8	£2.0	£11.8
Major household appliances (electric or not) per Person	£1.9	£2.0	£11.5	£0.4	£1.4	£1.3	£1.3	£2.5	£1.8	£3.8	£9.4	£2.1	£2.6	£2.6	£10.0	£6.1	£6.1	£12.7	£79.6
TV, hi fi, photographic and computer goods	£5.4	£5.7	£37.7	£1.4	£4.3	£4.2	£4.1	£8.2	£5.7	£11.6	£31.7	£7.0	£8.4	£8.1	£33.6	£20.4	£19.6	£42.9	£260.0
Audio-visual, photographic and information processing equipment p	£5.4	£5.7	£37.7	£1.4	£4.3	£4.2	£4.1	£8.2	£5.7	£11.6	£31.7	£7.0	£8.4	£8.1	£33.6	£20.4	£19.6	£42.9	£260.0
Books, CDs and DVDs	£3.6	£3.9	£24.7	£0.9	£3.0	£2.6	£2.6	£5.2	£3.7	£7.9	£20.2	£4.3	£5.1	£5.5	£22.0	£12.9	£12.1	£26.3	£166.7
Books and stationery per Person	£2.2	£2.4	£15.0	£0.6	£1.9	£1.6	£1.7	£3.2	£2.3	£5.0	£12.1	£2.7	£3.1	£3.4	£13.8	£7.8	£7.3	£15.6	£101.7
Recording media per Person	£1.4	£1.5	£9.7	£0.3	£1.1	£1.0	£1.0	£2.0	£1.4	£3.0	£8.0	£1.7	£2.1	£2.1	£8.2	£5.0	£4.9	£10.7	£65.0
Health and beauty goods	£10.2	£9.6	£58.1	£1.9	£6.8	£6.2	£6.4	£12.2	£9.1	£19.3	£46.4	£9.9	£12.0	£12.9	£49.2	£28.7	£27.5	£61.0	£387.3
Appliances for personal care per Person	£7.3	£6.7	£41.2	£1.3	£4.8	£4.2	£4.4	£8.4	£5.9	£13.5	£33.6	£6.8	£8.4	£9.0	£34.7	£20.1	£18.9	£43.7	£272.9
Medical goods and other pharmaceutical products per Person	£1.9	£1.9	£11.7	£0.4	£1.4	£1.4	£1.3	£2.5	£2.0	£4.0	£9.0	£2.1	£2.5	£2.7	£10.1	£5.9	£5.7	£11.8	£78.3
Therapeutic appliances and equipment per Person	£1.0	£0.9	£5.1	£0.2	£0.6	£0.7	£0.6	£1.2	£1.2	£1.8	£3.8	£0.9	£1.1	£1.3	£4.4	£2.7	£2.9	£5.6	£36.1
Recreational and luxury goods	£12.1	£11.8	£75.9	£2.8	£8.7	£7.7	£8.1	£16.0	£11.0	£23.4	£61.9	£13.1	£15.8	£16.4	£64.4	£39.1	£37.5	£84.0	£509.9
Games, toys and hobbies; sport and camping; musical instruments p	£6.9	£6.9	£43.7	£1.5	£4.9	£4.2	£4.7	£9.2	£6.3	£13.6	£36.3	£7.3	£9.1	£9.4	£36.5	£22.3	£21.2	£49.9	£294.0
Jewellery, clocks and watches per Person	£2.4	£1.9	£14.2	£0.5	£1.8	£1.4	£1.3	£2.6	£1.8	£4.0	£10.7	£2.4	£2.8	£3.1	£11.8	£7.0	£6.1	£13.5	£89.4
Other personal effects per Person	£1.3	£1.3	£7.6	£0.3	£0.8	£0.8	£0.8	£1.5	£1.1	£2.5	£6.4	£1.3	£1.6	£1.7	£6.5	£3.8	£3.5	£7.7	£50.5
Bicycles per Person	£0.4	£0.4	£2.4	£0.1	£0.3	£0.2	£0.3	£0.5	£0.3	£0.8	£2.3	£0.4	£0.5	£0.5	£2.3	£1.2	£1.2	£2.7	£16.8
Pets and related products per Person	£1.1	£1.4	£7.9	£0.4	£0.9	£1.0	£1.0	£2.1	£1.5	£2.5	£6.2	£1.7	£1.8	£1.7	£7.3	£4.9	£5.5	£10.1	£59.2

Notes: total expenditure calculated by multiplying population (Table 1) with per capita expenditure (Table 2) for each year.

CHELMSFORD CITY COUNCIL
RETAIL STUDY 2015

TABLE 3c: TOTAL RETAIL EXPENDITURE BY ZONE, 2025

GOODS CATEGORY	ZONE 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	TOTAL
Convenience Goods	£39.4	£41.3	£241.5	£8.4	£26.3	£25.4	£26.9	£53.4	£38.5	£80.0	£198.1	£41.8	£51.1	£52.8	£204.3	£124.2	£123.7	£274.3	£1,651.3
Clothes, footwear and fashion	£21.0	£19.3	£124.9	£4.4	£14.4	£13.1	£13.3	£25.9	£17.8	£39.3	£99.7	£21.8	£25.5	£27.6	£107.5	£66.0	£59.2	£133.4	£834.2
Clothing materials and garments per Person	£18.1	£16.4	£106.9	£3.8	£12.4	£11.3	£11.3	£22.1	£15.2	£33.6	£85.7	£18.7	£21.8	£23.7	£92.1	£56.5	£50.5	£114.1	£714.0
Shoes and other footwear per Person	£2.9	£2.9	£18.1	£0.7	£2.0	£1.9	£1.9	£3.8	£2.6	£5.7	£14.1	£3.2	£3.7	£3.9	£15.4	£9.5	£8.7	£19.4	£120.2
Furniture, floorcoverings and textiles	£11.0	£9.9	£61.9	£2.3	£7.7	£7.3	£7.1	£14.0	£9.9	£20.2	£51.8	£11.5	£12.9	£14.0	£54.5	£34.0	£32.2	£70.9	£433.1
Furniture and furnishings; carpets and other floor coverings per Perso	£7.9	£7.2	£44.2	£1.7	£5.4	£5.3	£5.1	£10.0	£7.0	£14.7	£37.1	£8.3	£9.4	£9.8	£38.4	£24.3	£23.1	£50.9	£309.6
Household textiles per Person	£3.1	£2.7	£17.7	£0.7	£2.4	£2.0	£2.1	£3.9	£3.0	£5.5	£14.7	£3.2	£3.5	£4.1	£16.1	£9.7	£9.1	£20.0	£123.4
DIY & hardware	£3.3	£4.1	£23.9	£1.1	£3.0	£2.9	£2.8	£5.6	£4.3	£8.1	£17.8	£4.8	£5.0	£5.5	£22.0	£13.9	£13.8	£26.8	£168.6
Gardens, plants and flowers per Person	£1.2	£1.6	£9.4	£0.4	£1.2	£1.1	£1.1	£2.1	£1.6	£3.1	£6.6	£1.9	£2.0	£2.2	£8.8	£5.5	£5.3	£9.9	£65.1
10% of Non-Durable household goods per Person	£0.2	£0.2	£1.1	£0.0	£0.1	£0.1	£0.1	£0.2	£0.2	£0.4	£0.8	£0.2	£0.2	£0.2	£1.0	£0.6	£0.5	£1.1	£7.3
Small tools and miscellaneous accessories	£1.3	£1.6	£9.6	£0.4	£1.2	£1.1	£1.1	£2.2	£1.7	£3.2	£7.6	£1.9	£2.0	£2.2	£8.7	£5.6	£5.4	£11.2	£68.2
Major tools and equipment per Person	£0.1	£0.2	£0.9	£0.0	£0.1	£0.1	£0.1	£0.2	£0.2	£0.3	£0.6	£0.2	£0.2	£0.2	£0.9	£0.6	£0.6	£1.0	£6.6
Materials for maintenance and repair of the dwelling per Person	£0.5	£0.5	£2.9	£0.1	£0.4	£0.4	£0.4	£0.8	£0.6	£1.0	£2.1	£0.6	£0.6	£0.6	£2.7	£1.7	£1.8	£3.6	£21.3
Domestic appliances and utensils	£4.9	£4.6	£28.9	£1.1	£3.4	£3.2	£3.2	£6.1	£4.3	£9.4	£23.9	£5.2	£6.4	£6.4	£25.6	£15.8	£14.8	£31.6	£199.1
Glassware, tableware and household utensils per Person	£2.2	£1.9	£12.8	£0.5	£1.5	£1.4	£1.4	£2.7	£1.9	£4.1	£10.7	£2.3	£2.8	£2.8	£11.7	£7.1	£6.4	£13.7	£87.9
Small electrical household appliances per Person	£0.4	£0.4	£2.1	£0.1	£0.2	£0.2	£0.2	£0.4	£0.3	£0.7	£1.9	£0.4	£0.4	£0.5	£1.7	£1.1	£1.0	£2.4	£14.3
Major household appliances (electric or not) per Person	£2.3	£2.4	£14.0	£0.5	£1.7	£1.6	£1.6	£3.0	£2.1	£4.6	£11.4	£2.5	£3.1	£3.2	£12.3	£7.6	£7.4	£15.5	£96.8
TV, hi fi, photographic and computer goods	£6.5	£6.9	£45.8	£1.7	£5.2	£5.1	£4.9	£9.9	£6.8	£13.9	£38.4	£8.5	£10.2	£9.8	£41.3	£25.4	£23.8	£52.2	£316.5
Audio-visual, photographic and information processing equipment p	£6.5	£6.9	£45.8	£1.7	£5.2	£5.1	£4.9	£9.9	£6.8	£13.9	£38.4	£8.5	£10.2	£9.8	£41.3	£25.4	£23.8	£52.2	£316.5
Books, CDs and DVDs	£4.4	£4.7	£29.9	£1.1	£3.7	£3.1	£3.2	£6.2	£4.5	£9.5	£24.4	£5.2	£6.2	£6.7	£27.1	£16.0	£14.8	£32.1	£202.9
Books and stationery per Person	£2.7	£3.0	£18.2	£0.7	£2.3	£1.9	£2.0	£3.8	£2.7	£6.0	£14.7	£3.2	£3.7	£4.2	£17.0	£9.7	£8.9	£19.0	£123.7
Recording media per Person	£1.7	£1.8	£11.7	£0.4	£1.4	£1.2	£1.2	£2.4	£1.7	£3.6	£9.7	£2.0	£2.5	£2.5	£10.1	£6.3	£5.9	£13.0	£79.1
Health and beauty goods	£12.3	£11.6	£70.4	£2.3	£8.3	£7.5	£7.6	£14.7	£10.9	£23.2	£56.2	£12.0	£14.6	£15.7	£60.5	£35.7	£33.4	£74.4	£471.3
Appliances for personal care per Person	£8.8	£8.2	£50.0	£1.6	£5.8	£5.0	£5.3	£10.2	£7.1	£16.2	£40.6	£8.3	£10.2	£10.8	£42.6	£25.1	£23.0	£53.2	£332.1
Medical goods and other pharmaceutical products per Person	£2.3	£2.3	£14.2	£0.5	£1.7	£1.7	£1.5	£3.0	£2.4	£4.9	£10.9	£2.5	£3.1	£3.3	£12.4	£7.3	£6.9	£14.3	£95.3
Therapeutic appliances and equipment per Person	£1.2	£1.1	£6.2	£0.2	£0.8	£0.9	£0.8	£1.5	£1.4	£2.2	£4.6	£1.1	£1.3	£1.5	£5.4	£3.3	£3.5	£6.8	£43.9
Recreational and luxury goods	£14.7	£14.3	£92.1	£3.4	£10.6	£9.4	£9.7	£19.3	£13.2	£28.2	£74.9	£16.0	£19.2	£19.9	£79.1	£48.8	£45.6	£102.4	£620.6
Games, toys and hobbies; sport and camping; musical instruments p	£8.4	£8.4	£53.0	£1.9	£5.9	£5.1	£5.6	£11.1	£7.5	£16.4	£44.0	£8.9	£11.0	£11.4	£44.8	£27.7	£25.8	£60.9	£357.8
Jewellery, clocks and watches per Person	£2.9	£2.3	£17.3	£0.6	£2.2	£1.7	£1.6	£3.2	£2.2	£4.9	£12.9	£2.9	£3.4	£3.8	£14.5	£8.7	£7.4	£16.4	£108.9
Other personal effects per Person	£1.5	£1.5	£9.2	£0.3	£1.0	£1.0	£0.9	£1.9	£1.3	£3.1	£7.7	£1.6	£2.0	£2.0	£8.0	£4.7	£4.2	£9.4	£61.4
Bicycles per Person	£0.5	£0.4	£2.9	£0.1	£0.3	£0.3	£0.3	£0.6	£0.4	£0.9	£2.8	£0.5	£0.7	£0.6	£2.8	£1.6	£1.4	£3.3	£20.4
Pets and related products per Person	£1.3	£1.7	£9.6	£0.5	£1.2	£1.2	£1.3	£2.5	£1.9	£3.0	£7.5	£2.1	£2.2	£2.1	£9.0	£6.1	£6.7	£12.4	£72.1

Notes: total expenditure calculated by multiplying population (Table 1) with per capita expenditure (Table 2) for each year.

TABLE 3d: TOTAL RETAIL EXPENDITURE BY ZONE, 2030

GOODS CATEGORY	ZONE																		TOTAL
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	
Convenience Goods	£41.7	£43.7	£256.2	£8.9	£27.9	£26.9	£28.3	£56.4	£40.5	£84.4	£209.4	£44.4	£54.1	£55.9	£219.2	£134.2	£131.3	£291.5	£1,754.9
Clothes, footwear and fashion	£25.5	£23.4	£152.2	£5.4	£17.6	£15.9	£16.0	£31.4	£21.6	£47.5	£121.1	£26.6	£30.9	£33.6	£132.5	£81.9	£72.2	£162.9	£1,018.3
Clothing materials and garments per Person	£22.0	£19.9	£130.2	£4.6	£15.1	£13.7	£13.7	£26.8	£18.4	£40.6	£104.0	£22.8	£26.5	£28.8	£113.5	£70.1	£61.6	£139.2	£871.6
Shoes and other footwear per Person	£3.5	£3.5	£22.0	£0.8	£2.5	£2.2	£2.3	£4.6	£3.2	£6.9	£17.1	£3.9	£4.5	£4.8	£19.0	£11.7	£10.5	£23.6	£146.7
Furniture, floorcoverings and textiles	£13.3	£12.0	£75.4	£2.8	£9.4	£8.9	£8.6	£16.9	£12.0	£24.5	£62.9	£14.0	£15.7	£17.0	£67.1	£42.2	£39.2	£86.6	£528.6
Furniture and furnishings; carpets and other floor coverings per Perso	£9.6	£8.7	£53.8	£2.0	£6.5	£6.4	£6.1	£12.1	£8.4	£17.8	£45.0	£10.1	£11.4	£12.0	£47.3	£30.2	£28.2	£62.2	£377.9
Household textiles per Person	£3.8	£3.3	£21.5	£0.8	£2.9	£2.4	£2.5	£4.8	£3.6	£6.7	£17.8	£3.9	£4.3	£5.0	£19.8	£12.0	£11.0	£24.4	£150.7
DIY & hardware	£4.0	£5.0	£29.1	£1.3	£3.7	£3.5	£3.4	£6.8	£5.2	£9.8	£21.6	£5.8	£6.1	£6.7	£27.1	£17.3	£16.8	£32.8	£205.8
Gardens, plants and flowers per Person	£1.5	£2.0	£11.4	£0.5	£1.5	£1.4	£1.3	£2.6	£1.9	£3.8	£8.1	£2.3	£2.4	£2.6	£10.8	£6.8	£6.5	£12.1	£79.5
10% of Non-Durable household goods per Person	£0.2	£0.2	£1.3	£0.0	£0.2	£0.1	£0.1	£0.3	£0.2	£0.4	£1.0	£0.2	£0.3	£0.3	£1.2	£0.7	£0.7	£1.4	£8.9
Small tools and miscellaneous accessories	£1.6	£1.9	£11.7	£0.5	£1.5	£1.4	£1.4	£2.7	£2.1	£3.9	£9.2	£2.3	£2.5	£2.7	£10.7	£6.9	£6.6	£13.7	£83.2
Major tools and equipment per Person	£0.1	£0.2	£1.1	£0.0	£0.1	£0.2	£0.1	£0.3	£0.2	£0.4	£0.7	£0.2	£0.2	£0.3	£1.1	£0.7	£0.7	£1.2	£8.0
Materials for maintenance and repair of the dwelling per Person	£0.6	£0.7	£3.5	£0.2	£0.4	£0.5	£0.5	£0.9	£0.7	£1.2	£2.6	£0.7	£0.7	£0.8	£3.3	£2.1	£2.2	£4.4	£26.0
Domestic appliances and utensils	£5.9	£5.6	£35.2	£1.3	£4.1	£3.9	£3.8	£7.5	£5.3	£11.4	£29.1	£6.4	£7.8	£7.8	£31.6	£19.6	£18.1	£38.5	£243.0
Glassware, tableware and household utensils per Person	£2.7	£2.3	£15.6	£0.6	£1.8	£1.7	£1.7	£3.3	£2.4	£4.9	£12.9	£2.9	£3.4	£3.4	£14.4	£8.8	£7.8	£16.7	£107.3
Small electrical household appliances per Person	£0.5	£0.4	£2.6	£0.1	£0.3	£0.2	£0.3	£0.5	£0.3	£0.9	£2.3	£0.4	£0.5	£0.6	£2.1	£1.3	£1.2	£3.0	£17.5
Major household appliances (electric or not) per Person	£2.8	£2.9	£17.0	£0.7	£2.1	£2.0	£1.9	£3.6	£2.6	£5.6	£13.8	£3.1	£3.8	£3.9	£15.2	£9.5	£9.1	£18.9	£118.2
TV, hi fi, photographic and computer goods	£8.0	£8.4	£55.8	£2.1	£6.4	£6.2	£5.9	£12.0	£8.2	£16.9	£46.6	£10.4	£12.4	£12.0	£50.9	£31.5	£29.1	£63.8	£386.4
Audio-visual, photographic and information processing equipment p	£8.0	£8.4	£55.8	£2.1	£6.4	£6.2	£5.9	£12.0	£8.2	£16.9	£46.6	£10.4	£12.4	£12.0	£50.9	£31.5	£29.1	£63.8	£386.4
Books, CDs and DVDs	£5.3	£5.7	£36.5	£1.3	£4.5	£3.8	£3.8	£7.6	£5.4	£11.5	£29.6	£6.4	£7.6	£8.2	£33.4	£19.9	£18.0	£39.1	£247.7
Books and stationery per Person	£3.3	£3.6	£22.2	£0.8	£2.8	£2.3	£2.4	£4.6	£3.3	£7.2	£17.8	£3.9	£4.5	£5.1	£20.9	£12.1	£10.8	£23.2	£151.0
Recording media per Person	£2.1	£2.1	£14.3	£0.5	£1.7	£1.5	£1.4	£2.9	£2.1	£4.3	£11.8	£2.5	£3.1	£3.1	£12.4	£7.8	£7.2	£15.9	£96.6
Health and beauty goods	£15.0	£14.1	£85.8	£2.8	£10.1	£9.2	£9.2	£17.8	£13.2	£28.1	£68.2	£14.6	£17.7	£19.1	£74.5	£44.3	£40.8	£90.8	£575.2
Appliances for personal care per Person	£10.7	£9.9	£60.9	£1.9	£7.0	£6.1	£6.5	£12.3	£8.6	£19.6	£49.3	£10.1	£12.4	£13.2	£52.5	£31.1	£28.1	£64.9	£405.3
Medical goods and other pharmaceutical products per Person	£2.8	£2.8	£17.4	£0.6	£2.1	£2.0	£1.9	£3.6	£2.9	£5.9	£13.2	£3.1	£3.7	£4.0	£15.3	£9.1	£8.4	£17.5	£116.3
Therapeutic appliances and equipment per Person	£1.4	£1.4	£7.6	£0.3	£1.0	£1.0	£0.9	£1.8	£1.7	£2.6	£5.6	£1.4	£1.6	£1.9	£6.7	£4.1	£4.3	£8.3	£53.6
Recreational and luxury goods	£17.9	£17.4	£112.2	£4.1	£12.9	£11.4	£11.7	£23.4	£16.0	£34.2	£90.9	£19.5	£23.3	£24.2	£97.5	£60.5	£55.6	£124.9	£757.5
Games, toys and hobbies; sport and camping; musical instruments p	£10.2	£10.2	£64.6	£2.3	£7.2	£6.2	£6.8	£13.5	£9.1	£19.8	£53.4	£10.8	£13.4	£13.9	£55.2	£34.4	£31.5	£74.3	£436.7
Jewellery, clocks and watches per Person	£3.6	£2.7	£21.1	£0.7	£2.7	£2.1	£1.9	£3.9	£2.6	£5.9	£15.7	£3.5	£4.2	£4.6	£17.9	£10.8	£9.1	£20.1	£132.9
Other personal effects per Person	£1.8	£1.9	£11.2	£0.4	£1.2	£1.2	£1.1	£2.3	£1.6	£3.7	£9.4	£1.9	£2.4	£2.5	£9.8	£5.9	£5.1	£11.5	£75.0
Bicycles per Person	£0.7	£0.5	£3.5	£0.1	£0.4	£0.4	£0.4	£0.7	£0.5	£1.1	£3.5	£0.6	£0.8	£0.8	£3.4	£1.9	£1.7	£4.0	£25.0
Pets and related products per Person	£1.6	£2.0	£11.7	£0.6	£1.4	£1.5	£1.5	£3.1	£2.2	£3.6	£9.1	£2.6	£2.6	£2.5	£11.1	£7.5	£8.1	£15.1	£88.0

Notes: total expenditure calculated by multiplying population (Table 1) with per capita expenditure (Table 2) for each year.

TABLE 3e: TOTAL RETAIL EXPENDITURE BY ZONE, 2036

GOODS CATEGORY	ZONE																		TOTAL
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	
Convenience Goods	£44.6	£46.8	£275.1	£9.5	£29.8	£28.7	£30.1	£60.2	£43.0	£89.8	£223.9	£47.6	£57.9	£59.9	£237.9	£146.2	£140.9	£313.3	£1,885.2
Clothes, footwear and fashion	£32.5	£29.9	£194.4	£6.9	£22.4	£20.2	£20.3	£39.8	£27.3	£60.2	£154.0	£34.0	£39.3	£42.8	£171.0	£106.1	£92.1	£208.2	£1,301.2
Clothing materials and garments per Person	£28.0	£25.4	£166.3	£5.9	£19.2	£17.4	£17.3	£34.0	£23.3	£51.5	£132.3	£29.1	£33.7	£36.7	£146.5	£90.9	£78.6	£178.0	£1,113.8
Shoes and other footwear per Person	£4.5	£4.5	£28.1	£1.0	£3.2	£2.9	£3.0	£5.8	£4.0	£8.7	£21.8	£4.9	£5.7	£6.1	£24.5	£15.2	£13.5	£30.2	£187.5
Furniture, floorcoverings and textiles	£17.0	£15.3	£96.3	£3.6	£12.0	£11.3	£10.9	£21.5	£15.2	£31.0	£79.9	£17.9	£20.0	£21.6	£86.6	£54.7	£50.0	£110.7	£675.5
Furniture and furnishings; carpets and other floor coverings per Perso	£12.2	£11.1	£68.8	£2.6	£8.3	£8.2	£7.7	£15.4	£10.6	£22.6	£57.3	£12.9	£14.5	£15.2	£61.1	£39.2	£35.9	£79.5	£482.9
Household textiles per Person	£4.8	£4.2	£27.5	£1.0	£3.7	£3.1	£3.1	£6.1	£4.5	£8.4	£22.7	£5.0	£5.5	£6.4	£25.6	£15.5	£14.1	£31.2	£192.6
DIY & hardware	£5.1	£6.3	£37.2	£1.6	£4.7	£4.5	£4.3	£8.7	£6.6	£12.4	£27.4	£7.4	£7.7	£8.5	£34.9	£22.4	£21.4	£41.9	£263.0
Gardens, plants and flowers per Person	£1.9	£2.5	£14.6	£0.7	£1.9	£1.7	£1.6	£3.3	£2.4	£4.8	£10.2	£2.9	£3.0	£3.4	£13.9	£8.9	£8.3	£15.5	£101.6
10% of Non-Durable household goods per Person	£0.2	£0.3	£1.6	£0.1	£0.2	£0.2	£0.2	£0.4	£0.3	£0.6	£1.3	£0.3	£0.4	£0.4	£1.6	£0.9	£0.8	£1.8	£11.4
Small tools and miscellaneous accessories	£2.1	£2.4	£15.0	£0.6	£1.9	£1.7	£1.7	£3.4	£2.6	£4.9	£11.7	£2.9	£3.2	£3.5	£13.8	£9.0	£8.5	£17.5	£106.4
Major tools and equipment per Person	£0.2	£0.3	£1.4	£0.1	£0.2	£0.2	£0.2	£0.4	£0.3	£0.5	£0.9	£0.3	£0.3	£0.4	£1.4	£0.9	£1.0	£1.5	£10.3
Materials for maintenance and repair of the dwelling per Person	£0.8	£0.8	£4.5	£0.2	£0.5	£0.6	£0.6	£1.2	£0.9	£1.6	£3.3	£0.9	£0.9	£1.0	£4.2	£2.7	£2.9	£5.6	£33.3
Domestic appliances and utensils	£7.6	£7.2	£45.0	£1.7	£5.3	£5.0	£4.9	£9.5	£6.6	£14.4	£37.0	£8.2	£9.9	£9.9	£40.8	£25.4	£23.1	£49.2	£310.5
Glassware, tableware and household utensils per Person	£3.4	£3.0	£19.9	£0.8	£2.3	£2.2	£2.1	£4.2	£3.0	£6.2	£16.5	£3.7	£4.3	£4.3	£18.5	£11.5	£10.0	£21.3	£137.2
Small electrical household appliances per Person	£0.6	£0.5	£3.3	£0.1	£0.3	£0.3	£0.3	£0.6	£0.4	£1.1	£2.9	£0.5	£0.7	£0.7	£2.6	£1.7	£1.6	£3.8	£22.3
Major household appliances (electric or not) per Person	£3.6	£3.7	£21.8	£0.8	£2.6	£2.5	£2.4	£4.6	£3.2	£7.0	£17.6	£4.0	£4.8	£4.9	£19.6	£12.3	£11.6	£24.1	£151.0
TV, hi fi, photographic and computer goods	£10.1	£10.7	£71.2	£2.6	£8.1	£7.9	£7.5	£15.2	£10.4	£21.4	£59.3	£13.3	£15.7	£15.2	£65.6	£40.9	£37.1	£81.5	£493.8
Audio-visual, photographic and information processing equipment p	£10.1	£10.7	£71.2	£2.6	£8.1	£7.9	£7.5	£15.2	£10.4	£21.4	£59.3	£13.3	£15.7	£15.2	£65.6	£40.9	£37.1	£81.5	£493.8
Books, CDs and DVDs	£6.8	£7.3	£46.6	£1.7	£5.7	£4.8	£4.9	£9.6	£6.8	£14.6	£37.7	£8.2	£9.6	£10.4	£43.1	£25.8	£23.0	£50.0	£316.5
Books and stationery per Person	£4.2	£4.6	£28.3	£1.1	£3.6	£3.0	£3.1	£5.9	£4.2	£9.2	£22.7	£5.0	£5.8	£6.5	£27.0	£15.7	£13.8	£29.7	£193.0
Recording media per Person	£2.6	£2.7	£18.3	£0.6	£2.1	£1.8	£1.8	£3.7	£2.6	£5.5	£15.0	£3.1	£3.9	£3.9	£16.1	£10.1	£9.2	£20.3	£123.5
Health and beauty goods	£19.0	£18.0	£109.6	£3.5	£12.8	£11.6	£11.7	£22.6	£16.7	£35.6	£86.7	£18.6	£22.5	£24.3	£96.2	£57.4	£52.0	£116.0	£735.0
Appliances for personal care per Person	£13.6	£12.6	£77.8	£2.5	£9.0	£7.8	£8.2	£15.7	£10.9	£24.8	£62.7	£12.9	£15.8	£16.8	£67.8	£40.3	£35.8	£83.0	£517.9
Medical goods and other pharmaceutical products per Person	£3.6	£3.6	£22.2	£0.7	£2.6	£2.6	£2.4	£4.6	£3.6	£7.5	£16.8	£3.9	£4.8	£5.1	£19.8	£11.8	£10.7	£22.3	£148.6
Therapeutic appliances and equipment per Person	£1.8	£1.7	£9.6	£0.3	£1.2	£1.3	£1.2	£2.3	£2.1	£3.3	£7.1	£1.8	£2.0	£2.4	£8.6	£5.3	£5.5	£10.7	£68.5
Recreational and luxury goods	£22.7	£22.2	£143.3	£5.2	£16.4	£14.5	£14.8	£29.7	£20.2	£43.3	£115.6	£24.9	£29.7	£30.9	£125.8	£78.4	£70.9	£159.7	£968.1
Games, toys and hobbies; sport and camping; musical instruments p	£12.9	£13.0	£82.5	£2.9	£9.1	£7.9	£8.6	£17.1	£11.5	£25.1	£67.9	£13.8	£17.0	£17.6	£71.3	£44.6	£40.2	£94.9	£558.0
Jewellery, clocks and watches per Person	£4.6	£3.5	£26.9	£0.9	£3.4	£2.6	£2.4	£4.9	£3.3	£7.5	£19.9	£4.5	£5.3	£5.9	£23.1	£14.0	£11.6	£25.6	£169.8
Other personal effects per Person	£2.3	£2.4	£14.4	£0.5	£1.6	£1.5	£1.4	£2.9	£2.0	£4.7	£11.9	£2.5	£3.0	£3.2	£12.7	£7.6	£6.6	£14.7	£95.8
Bicycles per Person	£0.8	£0.7	£4.5	£0.2	£0.5	£0.4	£0.5	£0.9	£0.6	£1.4	£4.4	£0.8	£1.0	£1.0	£4.4	£2.5	£2.2	£5.1	£31.9
Pets and related products per Person	£2.0	£2.6	£15.0	£0.8	£1.8	£1.9	£1.9	£3.9	£2.8	£4.6	£11.5	£3.3	£3.3	£3.2	£14.3	£9.8	£10.4	£19.3	£112.5

Notes: total expenditure calculated by multiplying population (Table 1) with per capita expenditure (Table 2) for each year.

TABLE 4: CONVENIENCE GOODS MARKET SHARES, 2015

STORE / CENTRE	FIRST CHOICE MAIN FOOD ZONE																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
City Centre																		
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1HT	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.5%	0.7%	0.7%	0.0%	0.0%	0.0%	0.0%
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	2.4%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Stores, Chelmsford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	0.4%	0.0%	0.3%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	12.3%	2.2%	4.1%	4.2%	0.0%	0.0%	0.0%	0.0%
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
North Melbourne																		
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.3%	6.6%	30.4%	0.0%	0.9%	0.0%	0.0%	0.0%
Chelmer Village																		
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	0.0%	0.0%	0.0%	0.7%	7.7%	0.0%	0.0%	0.0%	0.0%	0.0%	14.3%	7.1%	8.0%	9.5%	3.2%	0.0%	0.0%	0.2%
Great Baddow																		
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Moulsham Lodge																		
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other stores in Chelmsford																		
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	0.0%	0.0%	0.7%	2.6%	4.0%	1.4%	5.9%	1.6%	0.7%	0.0%	2.7%	9.3%	2.1%	3.0%	2.0%	0.0%	0.0%	0.0%
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	3.4%	0.6%	0.0%	17.0%	15.1%	5.3%	2.1%	0.6%	2.2%	0.0%	28.8%	32.2%	26.6%	9.7%	0.7%	4.7%	2.5%	0.3%
Lidl, Princes Road, CHELMSFORD, CM2 9DG	0.0%	0.0%	0.0%	1.2%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.0%	9.2%	1.0%	0.0%	0.0%	0.0%
Tesco, Princes Road, CHELMSFORD, CM2 9XW	0.0%	0.0%	0.7%	10.1%	1.6%	0.7%	0.0%	0.0%	0.0%	1.4%	26.8%	0.5%	20.4%	45.3%	6.3%	0.0%	0.0%	0.0%
Other - Chelmsford	0.0%	0.0%	0.0%	0.7%	3.0%	0.0%	0.7%	0.0%	2.2%	0.0%	0.0%	6.1%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
South Woodham Ferrers																		
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5SY	74.0%	3.4%	0.6%	30.5%	7.7%	39.7%	0.7%	0.0%	31.7%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside Chelmsford City Area	22.2%	95.3%	97.8%	36.7%	58.6%	52.9%	90.6%	97.8%	63.2%	95.3%	1.4%	35.4%	3.9%	13.8%	85.9%	95.3%	97.5%	99.5%

STORE / CENTRE	SECOND CHOICE MAIN FOOD ZONE																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
City Centre																		
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1HT	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	5.2%	1.0%	0.0%	1.3%	6.2%	0.0%	1.1%	0.0%	0.0%	1.2%	8.4%	0.8%	2.7%	5.0%	0.0%	3.3%	0.0%	0.0%
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Stores, Chelmsford	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	1.0%	0.0%	0.0%	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.7%	12.3%	4.7%	5.9%	0.0%	0.0%	0.0%	0.0%
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	0.0%	0.0%	0.0%	0.0%	9.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	1.1%	0.0%	0.0%	0.0%	0.0%
North Melbourne																		
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.2%	6.1%	13.9%	0.0%	2.8%	0.0%	0.0%	0.0%
Chelmer Village																		
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.6%	8.5%	9.1%	7.3%	5.5%	0.0%	9.9%	4.2%
Great Baddow																		
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Moulsham Lodge																		
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other stores in Chelmsford																		
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	2.1%	0.0%	0.0%	0.0%	6.1%	1.3%	2.5%	3.3%	1.3%	0.0%	15.0%	7.0%	1.1%	9.7%	3.0%	0.0%	0.0%	0.0%
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	4.8%	1.1%	0.0%	25.3%	25.2%	4.8%	3.2%	1.1%	0.0%	0.0%	17.7%	20.5%	19.2%	16.4%	0.8%	2.5%	7.8%	5.8%
Lidl, Princes Road, CHELMSFORD, CM2 9DG	0.6%	0.0%	0.4%	4.6%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	2.3%	1.3%	11.6%	13.1%	2.5%	3.3%	0.0%	0.0%
Tesco, Princes Road, CHELMSFORD, CM2 9XW	0.6%	0.0%	4.1%	11.2%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	18.6%	2.0%	17.2%	14.2%	5.0%	0.0%	0.0%	0.0%
Other - Chelmsford	1.0%	0.0%	0.0%	0.0%	7.0%	0.0%	0.0%	0.0%	1.7%	0.0%	3.3%	2.4%	8.4%	1.0%	0.0%	0.0%	0.0%	0.0%
South Woodham Ferrers																		
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5SY	25.1%	2.1%	0.5%	20.0%	4.9%	20.0%	0.0%	0.0%	17.3%	0.0%	0.0%	0.7%	1.6%	1.7%	0.0%	0.0%	0.0%	0.0%
Other	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside Chelmsford City Area	59.0%	95.9%	95.0%	33.8%	37.1%	71.2%	93.2%	95.5%	79.7%	98.8%	7.3%	38.3%	8.1%	22.6%	77.2%	90.9%	82.3%	90.0%

STORE / CENTRE	LAST TOP-UP SHOPPING DESTINATION ZONE																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
City Centre																		
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1HT	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.0%	4.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	1.4%	0.0%	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	1.0%	0.8%	0.8%	2.4%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	0.0%	0.0%	0.0%	8.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.7%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Stores, Chelmsford	0.0%	0.7%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.3%	2.2%	4.3%	4.5%	0.0%	0.4%	0.0%	0.0%
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	1.3%	0.0%	0.0%	4.5%	0.0%	2.8%	2.7%	0.0%	0.0%	0.0%	0.0%
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
North Melbourne																		
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.4%	6.6%	33.5%	0.0%	0.9%	0.0%	0.0%	0.0%
Chelmer Village																		
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.9%	0.0%	0.9%	3.8%	0.0%	0.0%	0.0%	0.0%
Great Baddow																		
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Moulsham Lodge																		
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other stores in Chelmsford																		
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	3.5%	7.8%	1.5%	2.9%	0.0%	0.0%	0.0%	0.0%
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	0.5%	0.0%	0.8%	9.5%	5.7%	0.0%	0.8%	0.0%	0.0%	0.0%	14.8%	11.1%	2.6%	0.0%	0.6%	0.0%	0.0%	0.0%
Lidl, Princes Road, CHELMSFORD, CM2 9DG	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	1.4%	1.2%	0.0%	0.0%	3.3%	0.0%	0.0%	12.8%	0.0%	0.0%	0.0%	0.0%
Tesco, Princes Road, CHELMSFORD, CM2 9XW	0.3%	0.0%	0.0%	0.0%	5.3%	0.0%	0.9%	0.0%	0.0%	0.0%	7.3%	0.0%	7.7%	16.5%	1.0%	0.0%	0.0%	1.4%
Other - Chelmsford	0.0%	0.0%	0.0%	10.2%	52.2%	2.1%	3.5%	0.0%	2.2%	0.0%	10.6%	1.6%	37.2%	18.5%	0.0%	0.0%	0.8%	0.0%
South Woodham Ferrers																		
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5SY	71.3%	1.4%	0.0%	25.5%	1.2%	23.6%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	18.4%	0.0%	0.0%	12.2%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside Chelmsford City Area	8.1%	97.9%	99.2%	27.7%	35.7%	70.6%	91.8%	97.5%	94.1%	99.2%	1.8%	61.2%	7.9%	30.0%	97.5%	99.6%	99.2%	98.3%

STORE / CENTRE	OTHER TOP-UP SHOPPING DESTINATIONS ZONE																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
City Centre																		
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1HT	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	3.1%	1.5%	3.2%	4.7%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	7.5%	1.8%	3.3%	5.9%	0.0%	3.3%	2.9%	0.6%
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Stores, Chelmsford	2.2%	0.0%	0.0%	2.3%	0.0%	0.0%	2.1%	4.6%	4.1%	2.6%	10.8%	5.4%	3.1%	35.2%	0.0%	0.0%	0.0%	0.0%
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	2.6%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.0%	0.0%	7.6%	0.0%	0.0%	0.0%	0.0%	0.8%
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	3.5%	2.0%	0.0%	0.0%	0.0%	0.0%
North Melbourne																		
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Chelmer Village																		
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	13.0%	6.4%	0.0%	0.0%	7.7%	0.0%	0.7%	0.0%
Great Baddow																		
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Moulsham Lodge																		
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	0.0%	0.0%	0.0%	0.0%
Other stores in Chelmsford																		
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	1.1%	0.0%	0.0%	4.0%	0.0%	4.2%	3.5%	0.0%	0.0%	0.0%	6.1%	3.6%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	0.0%	0.0%	0.0%	6.3%	2.3%	2.6%	1.9%	0.0%	0.0%	0.0%	3.5%	9.0%	0.0%	0.0%	4.1%	0.0%	25.0%	0.0%
Lidl, Princes Road, CHELMSFORD, CM2 9DG	2.1%	0.0%	0.0%	0.0%	2.3%	2.4%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	6.6%	5.5%	0.0%	0.0%	0.0%	0.0%
Tesco, Princes Road, CHELMSFORD, CM2 9XW	0.0%	3.6%	0.8%	2.4%	2.3%	0.0%	0.0%	0.0%	0.0%	5.6%	6.8%	0.0%	7.6%	6.9%	0.0%	0.0%	0.0%	0.0%
Other - Chelmsford	2.2%	0.0%	0.0%	4.0%	34.5%	0.0%	4.0%	0.0%	0.0%	0.0%	21.5%	0.0%	36.5%	8.7%	8.0%	0.0%	0.0%	0.0%
South Woodham Ferrers																		
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5SY	7.2%	0.0%	0.0%	9.2%	8.0%	20.0%	0.0%	0.0%	4.0%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	40.5%	0.0%	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside Chelmsford City Area	38.9%	94.9%	96.0%	60.9%	48.2%	70.9%	86.5%	95.4%	91.9%	85.5%	9.1%	67.8%	18.4%	31.9%	80.2%	96.7%	71.4%	98.6%

Notes: market shares taken from 2013 and 2015 household surveys.

TABLE 5a: CONVENIENCE GOODS TURNOVER, 2015

FIRST CHOICE MAIN FOOD — ZONE

STORE / CENTRE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
City Centre																		
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1H	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.1	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.6	£0.0	£0.0	£0.0	£0.0
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Stores, Chelmsford	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	£0.1	£0.0	£0.3	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£10.7	£0.4	£0.9	£1.0	£0.0	£0.0	£0.0	£0.0
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
North Melbourne																		
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£9.0	£1.2	£6.8	£0.0	£0.8	£0.0	£0.0	£0.0
Chelmer Village																		
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£12.4	£1.3	£1.8	£2.2	£2.8	£0.0	£0.0	£0.2
Great Baddow																		
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge																		
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other stores in Chelmsford																		
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	£0.0	£0.0	£0.7	£0.1	£0.5	£0.2	£0.7	£0.4	£0.1	£0.0	£2.4	£1.7	£0.5	£0.7	£1.7	£0.0	£0.0	£0.0
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	£0.6	£0.1	£0.0	£0.6	£1.7	£0.6	£0.3	£0.1	£0.4	£0.0	£25.1	£5.9	£6.0	£2.2	£0.6	£2.4	£1.3	£0.3
Lidl, Princes Road, CHELMSFORD, CM2 9DG	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.4	£0.0	£0.0	£2.1	£0.9	£0.0	£0.0	£0.0
Tesco, Princes Road, CHELMSFORD, CM2 9XW	£0.0	£0.0	£0.7	£0.4	£0.2	£0.1	£0.0	£0.0	£0.0	£0.5	£23.4	£0.1	£4.6	£10.5	£5.5	£0.0	£0.0	£0.0
Other - Chelmsford	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.1	£0.0	£0.4	£0.0	£0.0	£1.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers																		
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5S	£12.8	£0.6	£0.7	£1.1	£0.9	£4.5	£0.1	£0.0	£5.5	£1.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Outside Chelmsford City Area	£3.9	£17.3	####	£1.4	£6.7	£6.0	£10.9	£23.3	£10.9	£34.1	£1.2	£6.5	£0.9	£3.2	£75.2	£48.8	£52.5	####

SECOND CHOICE MAIN FOOD — ZONE

STORE / CENTRE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
City Centre																		
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1H	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	£0.4	£0.1	£0.0	£0.0	£0.3	£0.0	£0.1	£0.0	£0.0	£0.2	£3.1	£0.1	£0.3	£0.5	£0.0	£0.7	£0.0	£0.0
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Stores, Chelmsford	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£1.0	£0.5	£0.6	£0.0	£0.0	£0.0	£0.0
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0
North Melbourne																		
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.7	£0.5	£1.3	£0.0	£1.0	£0.0	£0.0	£0.0
Chelmer Village																		
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.7	£0.7	£0.9	£0.7	£2.0	£0.0	£2.3	£2.1
Great Baddow																		
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge																		
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other stores in Chelmsford																		
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	£0.2	£0.0	£0.0	£0.0	£0.3	£0.1	£0.1	£0.3	£0.1	£0.0	£5.6	£0.5	£0.1	£1.0	£1.1	£0.0	£0.0	£0.0
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	£0.4	£0.1	£0.0	£0.4	£1.2	£0.2	£0.2	£0.1	£0.0	£0.0	£6.6	£1.6	£1.8	£1.6	£0.3	£0.6	£1.8	£2.9
Lidl, Princes Road, CHELMSFORD, CM2 9DG	£0.0	£0.0	£0.2	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.9	£0.1	£1.1	£1.3	£1.0	£0.7	£0.0	£0.0
Tesco, Princes Road, CHELMSFORD, CM2 9XW	£0.0	£0.0	£1.8	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£7.0	£0.2	£1.7	£1.4	£1.9	£0.0	£0.0	£0.0
Other - Chelmsford	£0.1	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.1	£0.0	£1.2	£0.2	£0.8	£0.1	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers																		
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5S	£1.9	£0.2	£0.2	£0.3	£0.2	£1.0	£0.0	£0.0	£1.3	£0.0	£0.0	£0.1	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0
Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Outside Chelmsford City Area	£4.4	£7.5	£43.1	£0.5	£1.8	£3.4	£4.8	£9.7	£5.9	£15.1	£2.7	£3.0	£0.8	£2.2	£28.9	£20.0	£19.0	£45.9

LAST TOP-UP SHOPPING DESTINATION — ZONE

STORE / CENTRE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
City Centre																		
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1H	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.7	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.3	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.1	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Stores, Chelmsford	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.7	£0.2	£0.4	£0.4	£0.0	£0.1	£0.0	£0.0
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£1.7	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
North Melbourne																		
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.3	£0.5	£3.2	£0.0	£0.3	£0.0	£0.0	£0.0
Chelmer Village																		
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.3	£0.0	£0.1	£0.4	£0.0	£0.0	£0.0	£0.0
Great Baddow																		
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge																		
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other stores in Chelmsford																		
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.6	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	£0.0	£0.0	£0.4	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£5.5	£0.9	£0.3	£0.0	£0.2	£0.0	£0.0	£0.0
Lidl, Princes Road, CHELMSFORD, CM2 9DG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.1	£0.0	£0.0	£1.2	£0.0	£0.0	£1.3	£0.0	£0.0	£0.0	£0.0
Tesco, Princes Road, CHELMSFORD, CM2 9XW	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£2.7	£0.0	£0.7	£1.6	£0.4	£0.0	£0.0	£0.7
Other - Chelmsford	£0.0	£0.0	£0.0	£0.2	£2.6	£0.1	£0.2	£0.0	£0.2	£0.0	£4.0	£0.1	£3.6	£1.8	£0.0	£0.0	£0.2	£0.0
South Woodham Ferrers																		
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5S	£5.3	£0.1	£0.0	£0.4	£0.1	£1.1	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other	£1.4	£0.0	£0.0	£0.2	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Outside Chelmsford City Area	£0.6	£7.6	£45.1	£0.4	£1.8	£3.4	£4.7	£9.9	£6.9	£15.2	£0.7	£4.8	£0.8	£3.0	£36.5	£21.9	£22.9	£50.1

OTHER TOP-UP SHOPPING DESTINATIONS — ZONE

STORE / CENTRE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	TOTAL
City Centre																			
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1H	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.7
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	£0.1	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£1.2	£0.1	£0.1	£0.3	£0.0	£0.3	£0.3	£0.1	£11.1
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.7
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Local Stores, Chelmsford	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.1	£0.2	£1.7	£0.2	£0.1	£1.5	£0.0	£0.0	£0.0	£0.0	£9.0
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.2	£21.8
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£1.5
North Melbourne																			
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£32.2
Chelmer Village																			
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.1	£0.2	£0.0	£0.0	£1.2	£0.0	£0.1	£0.0	£42.5
Great Baddow																			
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge																			
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£2.0
Other stores in Chelmsford																			
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£1.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£22.9
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.6	£0.3	£0.0	£0.0	£0.7	£0.0	£2.5	£0.0	£80.2
Lidl, Princes Road, CHELMSFORD, CM2 9DG	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.2	£0.0	£0.0	£0.0	£0.0	£14.5
Tesco, Princes Road, CHELMSFORD, CM2 9XW	£0.0	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£1.1	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£69.0
Other - Chelmsford	£0.1	£0.0	£0.0	£0.0	£0.7	£0.0	£0.1	£0.0	£0.0	£0.0	£3.4	£0.0	£1.5	£0.4	£1.3	£0.0	£0.0	£0.0	£25.4
South Woodham Ferrers																			
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5S	£0.2	£0.0	£0.0	£0.1	£0.2	£0.4	£0.0	£0.0	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£41.2
Other	£1.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.0
Outside Chelmsford City Area	£1.2	£3.2	£18.7	£0.4	£1.0	£1.5	£1.9	£4.2	£2.9	£5.6	£1.5	£2.3	£0.8	£1.4	£12.9	£9.1	£7.1	£21.6	£1,076.9

Notes: study area turnover calculated by multiplying market share for each store/centre (Table 4) by available expenditure (Table 3) for each study area zone.

TABLE 5b: CONVENIENCE GOODS TURNOVER, 2020

FIRST CHOICE MAIN FOOD (ZONE)

STORE / CENTRE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
City Centre																		
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1H	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.1	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.6	£0.0	£0.0	£0.0	£0.0
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Stores, Chelmsford	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	£0.1	£0.0	£0.3	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£11.3	£0.4	£1.0	£1.0	£0.0	£0.0	£0.0	£0.0
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
North Melbourne																		
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£9.5	£1.3	£7.2	£0.0	£0.8	£0.0	£0.0	£0.0
Chelmer Village																		
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£13.0	£1.4	£1.9	£2.3	£2.9	£0.0	£0.0	£0.3
Great Baddow																		
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge																		
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other stores in Chelmsford																		
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	£0.0	£0.0	£0.7	£0.1	£0.5	£0.2	£0.7	£0.4	£0.1	£0.0	£2.5	£1.8	£0.5	£0.7	£1.9	£0.0	£0.0	£0.0
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	£0.6	£0.1	£0.0	£0.7	£1.8	£0.6	£0.3	£0.1	£0.4	£0.0	£26.4	£6.2	£6.3	£2.4	£0.7	£2.6	£1.4	£0.3
Lidl, Princes Road, CHELMSFORD, CM2 9DG	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.5	£0.0	£0.0	£2.2	£0.9	£0.0	£0.0	£0.0
Tesco, Princes Road, CHELMSFORD, CM2 9XW	£0.0	£0.0	£0.7	£0.4	£0.2	£0.1	£0.0	£0.0	£0.0	£0.5	£24.5	£0.1	£4.8	£11.0	£5.9	£0.0	£0.0	£0.0
Other - Chelmsford	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.1	£0.0	£0.4	£0.0	£0.0	£1.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers																		
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5S	£13.5	£0.7	£0.7	£1.2	£0.9	£4.7	£0.1	£0.0	£5.7	£1.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Outside Chelmsford City Area	£4.0	£18.2	####	£1.4	£7.1	£6.2	£11.3	£24.2	£11.3	£35.4	£1.3	£6.8	£0.9	£3.4	£79.9	£53.1	£55.4	####

SECOND CHOICE MAIN FOOD (ZONE)

STORE / CENTRE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
City Centre																		
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1H	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0	£0.0	£0.0
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	£0.4	£0.1	£0.0	£0.0	£0.3	£0.0	£0.1	£0.0	£0.0	£0.2	£3.3	£0.1	£0.3	£0.5	£0.0	£0.8	£0.0	£0.0
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Stores, Chelmsford	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£1.0	£0.5	£0.6	£0.0	£0.0	£0.0	£0.0
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0
North Melbourne																		
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.8	£0.5	£1.4	£0.0	£1.1	£0.0	£0.0	£0.0
Chelmer Village																		
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.9	£0.7	£0.9	£0.8	£2.2	£0.0	£2.4	£2.3
Great Baddow																		
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge																		
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other stores in Chelmsford																		
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	£0.2	£0.0	£0.0	£0.0	£0.3	£0.1	£0.1	£0.4	£0.1	£0.0	£5.9	£0.6	£0.1	£1.0	£1.2	£0.0	£0.0	£0.0
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	£0.4	£0.1	£0.0	£0.4	£1.3	£0.2	£0.2	£0.1	£0.0	£0.0	£6.9	£1.7	£1.9	£1.7	£0.3	£0.6	£1.9	£3.1
Lidl, Princes Road, CHELMSFORD, CM2 9DG	£0.0	£0.0	£0.2	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.9	£0.1	£1.2	£1.4	£1.0	£0.8	£0.0	£0.0
Tesco, Princes Road, CHELMSFORD, CM2 9XW	£0.0	£0.0	£1.9	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£7.3	£0.2	£1.7	£1.5	£2.0	£0.0	£0.0	£0.0
Other - Chelmsford	£0.1	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.1	£0.0	£1.3	£0.2	£0.8	£0.1	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers																		
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5S	£2.0	£0.2	£0.2	£0.3	£0.3	£1.0	£0.0	£0.0	£1.3	£0.0	£0.0	£0.1	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0
Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Outside Chelmsford City Area	£4.6	£7.8	£45.3	£0.6	£1.9	£3.6	£5.0	£10.1	£6.1	£15.7	£2.8	£3.2	£0.8	£2.4	£30.7	£21.7	£20.0	£48.5

LAST TOP-UP SHOPPING DESTINATION (ZONE)

STORE / CENTRE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
City Centre																		
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1H	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.9	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.3	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.1	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Stores, Chelmsford	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.9	£0.2	£0.4	£0.5	£0.0	£0.1	£0.0	£0.0
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£1.7	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
North Melbourne																		
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.5	£0.5	£3.4	£0.0	£0.4	£0.0	£0.0	£0.0
Chelmer Village																		
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.5	£0.0	£0.1	£0.4	£0.0	£0.0	£0.0	£0.0
Great Baddow																		
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge																		
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other stores in Chelmsford																		
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£0.6	£0.2	£0.3	£0.0	£0.0	£0.0	£0.0
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	£0.0	£0.0	£0.4	£0.2	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£5.8	£0.9	£0.3	£0.0	£0.2	£0.0	£0.0	£0.0
Lidl, Princes Road, CHELMSFORD, CM2 9DG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.1	£0.0	£0.0	£1.3	£0.0	£0.0	£1.3	£0.0	£0.0	£0.0	£0.0
Tesco, Princes Road, CHELMSFORD, CM2 9XW	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£2.9	£0.0	£0.8	£1.7	£0.4	£0.0	£0.0	£0.7
Other - Chelmsford	£0.0	£0.0	£0.0	£0.2	£2.7	£0.1	£0.2	£0.0	£0.2	£0.0	£4.2	£0.1	£3.8	£1.9	£0.0	£0.0	£0.2	£0.0
South Woodham Ferrers																		
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5S	£5.6	£0.1	£0.0	£0.4	£0.1	£1.2	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other	£1.4	£0.0	£0.0	£0.2	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Outside Chelmsford City Area	£0.6	£8.0	£47.3	£0.5	£1.9	£3.6	£4.9	£10.3	£7.2	£15.8	£0.7	£5.0	£0.8	£3.1	£38.8	£23.8	£24.1	£53.0

OTHER TOP-UP SHOPPING DESTINATIONS (ZONE)

STORE / CENTRE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	TOTAL
City Centre																			
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1H	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.0
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	£0.1	£0.1	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£1.3	£0.1	£0.1	£0.3	£0.0	£0.3	£0.3	£0.1	£11.7
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.9
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Local Stores, Chelmsford	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.1	£0.2	£1.8	£0.2	£0.1	£1.6	£0.0	£0.0	£0.0	£0.0	£9.5
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.2	£22.9
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£1.6
North Melbourne																			
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£33.9
Chelmer Village																			
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.2	£0.2	£0.0	£0.0	£1.3	£0.0	£0.1	£0.0	£44.7
Great Baddow																			
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge																			
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£2.1
Other stores in Chelmsford																			
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£1.0	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£24.1
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.6	£0.3	£0.0	£0.0	£0.7	£0.0	£2.6	£0.0	£84.3
Lidl, Princes Road, CHELMSFORD, CM2 9DG	£0.1	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.2	£0.0	£0.0	£0.0	£0.0	£15.2
Tesco, Princes Road, CHELMSFORD, CM2 9XW	£0.0	£0.1	£0.2	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.4	£1.1	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£72.6
Other - Chelmsford	£0.1	£0.0	£0.0	£0.0	£0.8	£0.0	£0.1	£0.0	£0.0	£0.0	£3.6	£0.0	£1.6	£0.4	£1.4	£0.0	£0.0	£0.0	£26.7
South Woodham Ferrers																			
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5S	£0.2	£0.0	£0.0	£0.1	£0.2	£0.4	£0.0	£0.0	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£43.1
Other	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.2
Outside Chelmsford City Area	£1.3	£3.3	£19.6	£0.4	£1.1	£1.5	£2.0	£4.3	£3.0	£5.8	£1.5	£2.4	£0.8	£1.4	£13.7	£9.9	£7.5	£22.8	£1,136.7

Notes: study area turnover calculated by multiplying market share for each store/centre (Table 4) by available expenditure (Table 3) for each study area zone.

TABLE 5c: CONVENIENCE GOODS TURNOVER, 2025

FIRST CHOICE MAIN FOOD (ZONE)

STORE / CENTRE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
City Centre																		
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1H'	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.1	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.6	£0.0	£0.0	£0.0	£0.0
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Stores, Chelmsford	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	£0.1	£0.0	£0.3	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£12.0	£0.5	£1.0	£1.1	£0.0	£0.0	£0.0	£0.0
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
North Melbourne																		
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£10.0	£1.4	£7.6	£0.0	£0.9	£0.0	£0.0	£0.0
Chelmer Village																		
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	£0.0	£0.0	£0.0	£0.0	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£13.8	£1.5	£2.0	£2.4	£3.2	£0.0	£0.0	£0.3
Great Baddow																		
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge																		
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other stores in Chelmsford																		
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	£0.0	£0.0	£0.8	£0.1	£0.5	£0.2	£0.8	£0.4	£0.1	£0.0	£2.6	£1.9	£0.5	£0.8	£2.0	£0.0	£0.0	£0.0
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	£0.7	£0.1	£0.0	£0.7	£1.9	£0.7	£0.3	£0.2	£0.4	£0.0	£28.0	£6.6	£6.7	£2.5	£0.7	£2.9	£1.5	£0.4
Lidl, Princes Road, CHELMSFORD, CM2 9DG	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.6	£0.0	£0.0	£2.4	£1.0	£0.0	£0.0	£0.0
Tesco, Princes Road, CHELMSFORD, CM2 9XW	£0.0	£0.0	£0.8	£0.4	£0.2	£0.1	£0.0	£0.0	£0.0	£0.5	£26.0	£0.1	£5.1	£11.7	£6.3	£0.0	£0.0	£0.0
Other - Chelmsford	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.1	£0.0	£0.4	£0.0	£0.0	£1.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers																		
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5S'	£14.3	£0.7	£0.7	£1.3	£1.0	£4.9	£0.1	£0.0	£6.0	£1.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Outside Chelmsford City Area	£4.3	£19.3	####	£1.5	£7.5	£6.6	£11.9	£25.6	£11.9	£37.4	£1.4	£7.2	£1.0	£3.6	£86.1	£58.0	£59.1	####

SECOND CHOICE MAIN FOOD (ZONE)

STORE / CENTRE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
City Centre																		
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1H'	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0	£0.0	£0.0
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	£0.4	£0.1	£0.0	£0.0	£0.3	£0.0	£0.1	£0.0	£0.0	£0.2	£3.5	£0.1	£0.3	£0.6	£0.0	£0.9	£0.0	£0.0
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Stores, Chelmsford	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0	£1.1	£0.5	£0.6	£0.0	£0.0	£0.0	£0.0
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0
North Melbourne																		
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.0	£0.5	£1.5	£0.0	£1.2	£0.0	£0.0	£0.0
Chelmer Village																		
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.2	£0.7	£1.0	£0.8	£2.3	£0.0	£2.6	£2.4
Great Baddow																		
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge																		
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other stores in Chelmsford																		
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	£0.2	£0.0	£0.0	£0.0	£0.3	£0.1	£0.1	£0.4	£0.1	£0.0	£6.2	£0.6	£0.1	£1.1	£1.3	£0.0	£0.0	£0.0
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	£0.4	£0.1	£0.0	£0.4	£1.4	£0.3	£0.2	£0.1	£0.0	£0.0	£7.4	£1.8	£2.1	£1.8	£0.3	£0.7	£2.0	£3.3
Lidl, Princes Road, CHELMSFORD, CM2 9DG	£0.0	£0.0	£0.2	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£1.0	£0.1	£1.2	£1.4	£1.1	£0.9	£0.0	£0.0
Tesco, Princes Road, CHELMSFORD, CM2 9XW	£0.0	£0.0	£2.1	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£7.8	£0.2	£1.8	£1.6	£2.1	£0.0	£0.0	£0.0
Other - Chelmsford	£0.1	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.1	£0.0	£1.4	£0.2	£0.9	£0.1	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers																		
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5S'	£2.1	£0.2	£0.3	£0.4	£0.3	£1.1	£0.0	£0.0	£1.4	£0.0	£0.0	£0.1	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0
Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Outside Chelmsford City Area	£4.9	£8.3	£48.2	£0.6	£2.0	£3.8	£5.3	£10.7	£6.4	£16.6	£3.0	£3.4	£0.9	£2.5	£33.1	£23.7	£21.4	£51.9

LAST TOP-UP SHOPPING DESTINATION (ZONE)

STORE / CENTRE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
City Centre																		
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1H'	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.2	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.3	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.1	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Stores, Chelmsford	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.0	£0.2	£0.5	£0.5	£0.0	£0.1	£0.0	£0.0
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£1.9	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
North Melbourne																		
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.8	£0.6	£3.6	£0.0	£0.4	£0.0	£0.0	£0.0
Chelmer Village																		
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.7	£0.0	£0.1	£0.4	£0.0	£0.0	£0.0	£0.0
Great Baddow																		
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge																		
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other stores in Chelmsford																		
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£0.7	£0.2	£0.3	£0.0	£0.0	£0.0	£0.0
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	£0.0	£0.0	£0.4	£0.2	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£6.1	£1.0	£0.3	£0.0	£0.2	£0.0	£0.0	£0.0
Lidl, Princes Road, CHELMSFORD, CM2 9DG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.1	£0.0	£0.0	£1.4	£0.0	£0.0	£1.4	£0.0	£0.0	£0.0	£0.0
Tesco, Princes Road, CHELMSFORD, CM2 9XW	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£3.0	£0.0	£0.8	£1.8	£0.4	£0.0	£0.0	£0.8
Other - Chelmsford	£0.0	£0.0	£0.0	£0.2	£2.9	£0.1	£0.2	£0.0	£0.2	£0.0	£4.4	£0.1	£4.0	£2.1	£0.0	£0.0	£0.2	£0.0
South Woodham Ferrers																		
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5S'	£5.9	£0.1	£0.0	£0.4	£0.1	£1.3	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other	£1.5	£0.0	£0.0	£0.2	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Outside Chelmsford City Area	£0.7	£8.5	£50.3	£0.5	£2.0	£3.8	£5.2	£10.9	£7.6	£16.7	£0.8	£5.4	£0.9	£3.3	£41.8	£26.0	£25.8	£56.6

OTHER TOP-UP SHOPPING DESTINATIONS (ZONE) and **TOTAL**

STORE / CENTRE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	TOTAL
City Centre																			
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1H'	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.4
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	£0.1	£0.1	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£1.3	£0.1	£0.2	£0.3	£0.0	£0.4	£0.3	£0.1	£12.4
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.1
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Local Stores, Chelmsford	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.2	£0.1	£0.2	£1.9	£0.2	£0.1	£1.7	£0.0	£0.0	£0.0	£0.0	£10.1
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.2	£24.3
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£1.7
North Melbourne																			
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£36.0
Chelmer Village																			
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.3	£0.2	£0.0	£0.0	£1.4	£0.0	£0.1	£0.0	£47.6
Great Baddow																			
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge																			
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£2.2
Other stores in Chelmsford																			
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£1.1	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£25.6
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.6	£0.3	£0.0	£0.0	£0.8	£0.0	£2.8	£0.0	£89.7
Lidl, Princes Road, CHELMSFORD, CM2 9DG	£0.1	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£16.2
Tesco, Princes Road, CHELMSFORD, CM2 9XW	£0.0	£0.1	£0.2	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.4	£1.2	£0.0	£0.4	£0.3	£0.0	£0.0	£0.0	£0.0	£77.2
Other - Chelmsford	£0.1	£0.0	£0.0	£0.0	£0.8	£0.0	£0.1	£0.0	£0.0	£0.0	£3.8	£0.0	£1.7	£0.4	£1.5	£0.0	£0.0	£0.0	£28.3
South Woodham Ferrers																			
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5S'	£0.3	£0.0	£0.0	£0.1	£0.2	£0.5	£0.0	£0.0	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£45.6
Other	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.4
Outside Chelmsford City Area	£1.4	£3.5	£20.9	£0.5	£1.1	£1.6	£2.1	£4.6	£3.2	£6.2	£1.6	£2.5	£0.8	£1.5	£14.7	£10.8	£7.9	£24.3	£1,214.4

Notes: study area turnover calculated by multiplying market share for each store/centre (Table 4) by available expenditure (Table 3) for each study area zone.

TABLE 5d: CONVENIENCE GOODS TURNOVER, 2030

FIRST CHOICE MAIN FOOD — ZONE

STORE / CENTRE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
City Centre																		
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1H'	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.1	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.7	£0.0	£0.0	£0.0	£0.0
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Stores, Chelmsford	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	£0.1	£0.0	£0.3	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£12.6	£0.5	£1.1	£1.1	£0.0	£0.0	£0.0	£0.0
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
North Melbourne																		
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£10.6	£1.4	£8.1	£0.0	£0.9	£0.0	£0.0	£0.0
Chelmer Village																		
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	£0.0	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£14.6	£1.5	£2.1	£2.6	£3.4	£0.0	£0.0	£0.3
Great Baddow																		
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge																		
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other stores in Chelmsford																		
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	£0.0	£0.0	£0.8	£0.1	£0.5	£0.2	£0.8	£0.4	£0.1	£0.0	£2.8	£2.0	£0.6	£0.8	£2.1	£0.0	£0.0	£0.0
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	£0.7	£0.1	£0.0	£0.7	£2.1	£0.7	£0.3	£0.2	£0.4	£0.0	£29.6	£7.0	£7.1	£2.7	£0.8	£3.1	£1.6	£0.4
Lidl, Princes Road, CHELMSFORD, CM2 9DG	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.8	£0.0	£0.0	£2.5	£1.1	£0.0	£0.0	£0.0
Tesco, Princes Road, CHELMSFORD, CM2 9XW	£0.0	£0.0	£0.8	£0.4	£0.2	£0.1	£0.0	£0.0	£0.0	£0.6	£27.5	£0.1	£5.4	£12.4	£6.8	£0.0	£0.0	£0.0
Other - Chelmsford	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.1	£0.0	£0.4	£0.0	£0.0	£1.3	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers																		
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5S'	£15.1	£0.7	£0.8	£1.3	£1.0	£5.2	£0.1	£0.0	£6.3	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Outside Chelmsford City Area	£4.5	£20.4	####	£1.6	£8.0	£7.0	£12.6	£27.0	£12.5	£39.4	£1.5	£7.7	£1.0	£3.8	£92.3	£62.6	£62.7	####

SECOND CHOICE MAIN FOOD — ZONE

STORE / CENTRE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
City Centre																		
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1H'	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.0	£0.0	£0.0
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	£0.5	£0.1	£0.0	£0.0	£0.4	£0.0	£0.1	£0.0	£0.0	£0.2	£3.7	£0.1	£0.3	£0.6	£0.0	£0.9	£0.0	£0.0
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Stores, Chelmsford	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.1	£1.1	£0.5	£0.7	£0.0	£0.0	£0.0	£0.0
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0
North Melbourne																		
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.2	£0.6	£1.6	£0.0	£1.3	£0.0	£0.0	£0.0
Chelmer Village																		
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.5	£0.8	£1.0	£0.9	£2.5	£0.0	£2.7	£2.6
Great Baddow																		
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge																		
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other stores in Chelmsford																		
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	£0.2	£0.0	£0.0	£0.0	£0.4	£0.1	£0.1	£0.4	£0.1	£0.0	£6.6	£0.6	£0.1	£1.1	£1.4	£0.0	£0.0	£0.0
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	£0.4	£0.1	£0.0	£0.5	£1.5	£0.3	£0.2	£0.1	£0.0	£0.0	£7.8	£1.9	£2.2	£1.9	£0.4	£0.7	£2.2	£3.5
Lidl, Princes Road, CHELMSFORD, CM2 9DG	£0.1	£0.0	£0.2	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£1.0	£0.1	£1.3	£1.5	£1.2	£0.9	£0.0	£0.0
Tesco, Princes Road, CHELMSFORD, CM2 9XW	£0.1	£0.0	£2.2	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£8.2	£0.2	£1.9	£1.7	£2.3	£0.0	£0.0	£0.0
Other - Chelmsford	£0.1	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.1	£0.0	£1.4	£0.2	£1.0	£0.1	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers																		
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5S'	£2.2	£0.2	£0.3	£0.4	£0.3	£1.1	£0.0	£0.0	£1.5	£0.0	£0.0	£0.1	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0
Other	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Outside Chelmsford City Area	£5.2	£8.8	£51.1	£0.6	£2.2	£4.0	£5.5	£11.3	£6.8	£17.5	£3.2	£3.6	£0.9	£2.7	£35.5	£25.6	£22.7	£55.1

LAST TOP-UP SHOPPING DESTINATION — ZONE

STORE / CENTRE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
City Centre																		
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1H'	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.4	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.4	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.1	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Stores, Chelmsford	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.2	£0.2	£0.5	£0.5	£0.0	£0.1	£0.0	£0.0
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.2	£0.0	£0.0	£2.0	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
North Melbourne																		
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.0	£0.6	£3.8	£0.0	£0.4	£0.0	£0.0	£0.0
Chelmer Village																		
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.9	£0.0	£0.1	£0.4	£0.0	£0.0	£0.0	£0.0
Great Baddow																		
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge																		
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other stores in Chelmsford																		
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£0.7	£0.2	£0.3	£0.0	£0.0	£0.0	£0.0
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	£0.0	£0.0	£0.4	£0.2	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£6.5	£1.0	£0.3	£0.0	£0.3	£0.0	£0.0	£0.0
Lidl, Princes Road, CHELMSFORD, CM2 9DG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.1	£0.0	£0.0	£1.4	£0.0	£0.0	£1.5	£0.0	£0.0	£0.0	£0.0
Tesco, Princes Road, CHELMSFORD, CM2 9XW	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.1	£0.0	£0.0	£0.0	£3.2	£0.0	£0.9	£1.9	£0.5	£0.0	£0.0	£0.8
Other - Chelmsford	£0.0	£0.0	£0.0	£0.2	£3.1	£0.1	£0.2	£0.0	£0.2	£0.0	£4.7	£0.1	£4.2	£2.2	£0.0	£0.0	£0.2	£0.0
South Woodham Ferrers																		
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5S'	£6.2	£0.1	£0.0	£0.5	£0.1	£1.3	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other	£1.6	£0.0	£0.0	£0.2	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Outside Chelmsford City Area	£0.7	£9.0	£53.4	£0.5	£2.1	£4.0	£5.5	£11.6	£8.0	£17.6	£0.8	£5.7	£0.9	£3.5	£44.9	£28.1	£27.4	£60.2

OTHER TOP-UP SHOPPING DESTINATIONS — ZONE

STORE / CENTRE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	TOTAL
City Centre																			
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1H'	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.8
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	£0.1	£0.1	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£1.4	£0.1	£0.2	£0.3	£0.0	£0.4	£0.3	£0.2	£13.2
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.3
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Local Stores, Chelmsford	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.2	£0.1	£0.2	£2.0	£0.2	£0.2	£1.8	£0.0	£0.0	£0.0	£0.0	£10.7
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.2	£25.7
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£1.8
North Melbourne																			
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£38.1
Chelmer Village																			
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.4	£0.3	£0.0	£0.0	£1.5	£0.0	£0.1	£0.0	£50.5
Great Baddow																			
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge																			
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£2.3
Other stores in Chelmsford																			
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£1.2	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£27.1
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.7	£0.4	£0.0	£0.0	£0.8	£0.0	£3.0	£0.0	£95.1
Lidl, Princes Road, CHELMSFORD, CM2 9DG	£0.1	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£17.2
Tesco, Princes Road, CHELMSFORD, CM2 9XW	£0.0	£0.1	£0.2	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.4	£1.3	£0.0	£0.4	£0.3	£0.0	£0.0	£0.0	£0.0	£81.8
Other - Chelmsford	£0.1	£0.0	£0.0	£0.0	£0.9	£0.0	£0.1	£0.0	£0.0	£0.0	£4.1	£0.0	£1.8	£0.4	£1.6	£0.0	£0.0	£0.0	£30.0
South Woodham Ferrers																			
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5S'	£0.3	£0.0	£0.0	£0.1	£0.2	£0.5	£0.0	£0.0	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£48.3
Other	£1.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.5
Outside Chelmsford City Area	£1.5	£3.7	£22.1	£0.5	£1.2	£1.7	£2.2	£4.8	£3.3	£6.5	£1.7	£2.7	£0.9	£1.6	£15.8	£11.7	£8.4	£25.9	£1,292.0

Notes: study area turnover calculated by multiplying market share for each store/centre (Table 4) by available expenditure (Table 3) for each study area zone.

TABLE 5e: CONVENIENCE GOODS TURNOVER, 2036

STORE / CENTRE	FIRST CHOICE MAIN FOOD ZONE 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
City Centre																		
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1H	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.1	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.7	£0.0	£0.0	£0.0	£0.0
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Stores, Chelmsford	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	£0.1	£0.0	£0.4	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£13.5	£0.5	£1.2	£1.2	£0.0	£0.0	£0.0	£0.0
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
North Melbourne																		
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£11.4	£1.5	£8.6	£0.0	£1.0	£0.0	£0.0	£0.0
Chelmer Village																		
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	£0.0	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£15.6	£1.7	£2.3	£2.8	£3.7	£0.0	£0.0	£0.3
Great Baddow																		
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge																		
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other stores in Chelmsford																		
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	£0.0	£0.0	£0.9	£0.1	£0.6	£0.2	£0.9	£0.5	£0.1	£0.0	£3.0	£2.2	£0.6	£0.9	£2.3	£0.0	£0.0	£0.0
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	£0.7	£0.1	£0.0	£0.8	£2.2	£0.7	£0.3	£0.2	£0.5	£0.0	£31.6	£7.5	£7.5	£2.8	£0.9	£3.4	£1.7	£0.4
Lidl, Princes Road, CHELMSFORD, CM2 9DG	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£3.0	£0.0	£0.0	£2.7	£1.2	£0.0	£0.0	£0.0
Tesco, Princes Road, CHELMSFORD, CM2 9XW	£0.0	£0.0	£0.9	£0.5	£0.2	£0.1	£0.0	£0.0	£0.0	£0.6	£29.4	£0.1	£5.8	£13.3	£7.3	£0.0	£0.0	£0.0
Other - Chelmsford	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.1	£0.0	£0.5	£0.0	£0.0	£1.4	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers																		
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5S	£16.2	£0.8	£0.9	£1.4	£1.1	£5.6	£0.1	£0.0	£6.7	£1.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Outside Chelmsford City Area	£4.9	£21.9	####	£1.7	£8.6	£7.4	£13.3	£28.8	£13.3	£42.0	£1.6	£8.3	£1.1	£4.1	####	£68.3	£67.3	####

STORE / CENTRE	SECOND CHOICE MAIN FOOD ZONE 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
City Centre																		
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1H	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£0.0
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	£0.5	£0.1	£0.0	£0.0	£0.4	£0.0	£0.1	£0.0	£0.0	£0.2	£3.9	£0.1	£0.3	£0.6	£0.0	£1.0	£0.0	£0.0
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Stores, Chelmsford	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.2	£1.2	£0.6	£0.7	£0.0	£0.0	£0.0	£0.0
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0
North Melbourne																		
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.4	£0.6	£1.7	£0.0	£1.4	£0.0	£0.0	£0.0
Chelmer Village																		
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.9	£0.8	£1.1	£0.9	£2.7	£0.0	£2.9	£2.8
Great Baddow																		
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge																		
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other stores in Chelmsford																		
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	£0.2	£0.0	£0.0	£0.0	£0.4	£0.1	£0.2	£0.4	£0.1	£0.0	£7.1	£0.7	£0.1	£1.2	£1.5	£0.0	£0.0	£0.0
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	£0.5	£0.1	£0.0	£0.5	£1.6	£0.3	£0.2	£0.1	£0.0	£0.0	£8.3	£2.1	£2.3	£2.1	£0.4	£0.8	£2.3	£3.8
Lidl, Princes Road, CHELMSFORD, CM2 9DG	£0.1	£0.0	£0.3	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£1.1	£0.1	£1.4	£1.6	£1.3	£1.0	£0.0	£0.0
Tesco, Princes Road, CHELMSFORD, CM2 9XW	£0.1	£0.0	£2.3	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£8.8	£0.2	£2.1	£1.8	£2.5	£0.0	£0.0	£0.0
Other - Chelmsford	£0.1	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.2	£0.0	£1.5	£0.2	£1.0	£0.1	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers																		
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5S	£2.4	£0.2	£0.3	£0.4	£0.3	£1.2	£0.0	£0.0	£1.6	£0.0	£0.0	£0.1	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0
Other	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Outside Chelmsford City Area	£5.5	£9.4	£54.9	£0.7	£2.3	£4.3	£5.9	£12.1	£7.2	£18.6	£3.4	£3.8	£1.0	£2.8	£38.5	£27.9	£24.3	£59.2

STORE / CENTRE	LAST TOP-UP SHOPPING DESTINATION ZONE 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
City Centre																		
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1H	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.7	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.4	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.1	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Local Stores, Chelmsford	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.4	£0.2	£0.5	£0.6	£0.0	£0.1	£0.0	£0.0
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.2	£0.0	£0.0	£2.1	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
North Melbourne																		
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.4	£0.7	£4.1	£0.0	£0.5	£0.0	£0.0	£0.0
Chelmer Village																		
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.2	£0.0	£0.1	£0.5	£0.0	£0.0	£0.0	£0.0
Great Baddow																		
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge																		
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other stores in Chelmsford																		
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£0.8	£0.2	£0.4	£0.0	£0.0	£0.0	£0.0
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	£0.1	£0.0	£0.5	£0.2	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£6.9	£1.1	£0.3	£0.0	£0.3	£0.0	£0.0	£0.0
Lidl, Princes Road, CHELMSFORD, CM2 9DG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.2	£0.0	£0.0	£1.5	£0.0	£0.0	£1.6	£0.0	£0.0	£0.0	£0.0
Tesco, Princes Road, CHELMSFORD, CM2 9XW	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.1	£0.0	£0.0	£0.0	£3.4	£0.0	£0.9	£2.1	£0.5	£0.0	£0.0	£0.9
Other - Chelmsford	£0.0	£0.0	£0.0	£0.2	£3.3	£0.1	£0.2	£0.0	£0.2	£0.0	£5.0	£0.2	£4.5	£2.3	£0.0	£0.0	£0.2	£0.0
South Woodham Ferrers																		
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5S	£6.7	£0.1	£0.0	£0.5	£0.1	£1.4	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other	£1.7	£0.0	£0.0	£0.2	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Outside Chelmsford City Area	£0.8	£9.6	£57.3	£0.6	£2.2	£4.3	£5.8	£12.3	£8.5	£18.7	£0.8	£6.1	£1.0	£3.8	£48.7	£30.6	£29.4	£64.7

STORE / CENTRE	OTHER TOP-UP SHOPPING DESTINATIONS ZONE 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	TOTAL
City Centre																			
Co-Op, 191 Moulsham Street, CHELMSFORD, CM2 0LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3
Marks and Spencer Simply Food, Saxon House, 27 Duke Street, CHELMSFORD, CM1 1H	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£7.2
Marks and Spencer, 62 High Street, CHELMSFORD, CM1 1DH	£0.1	£0.1	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£1.5	£0.1	£0.2	£0.3	£0.0	£0.4	£0.4	£0.2	£14.1
Tesco Express, 52 Moulsham Street, CHELMSFORD, CM2 0JA	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.7
Tesco Express, Unit 6, 1 Dukes Walk, Dukes Street, CHELMSFORD, CM1 1GZ	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
Local Stores, Chelmsford	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3	£0.2	£0.2	£2.2	£0.2	£0.2	£1.9	£0.0	£0.0	£0.0	£0.0	£11.4
Tesco, 47-53 Springfield Road, CHELMSFORD, CM2 6QT	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.2	£27.5
Iceland, Springfield Road, CHELMSFORD, CM2 6JY	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£1.9
North Melbourne																			
Morrisons, Copperfield Road, North Melbourne Centre, CHELMSFORD, CM1 4UX	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£40.8
Chelmer Village																			
Asda, Village Square, Chelmer Village, CHELMSFORD, CM2 6RE	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£2.6	£0.3	£0.0	£0.0	£1.7	£0.0	£0.1	£0.0	£54.2
Great Baddow																			
Co-Op, 9C The Vineyards, Great Baddow, CHELMSFORD, CM2 7QS	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge																			
Co-Op, 156 Gloucester Avenue, Moulsham Lodge, CHELMSFORD, CM2 9LG	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£2.5
Other stores in Chelmsford																			
Aldi, 471 Springfield Road, CHELMSFORD, CM2 6AP	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£1.2	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£29.1
J Sainsbury, 2 White Hart Lane, Springfield, CHELMSFORD, CM1 6TD	£0.0	£0.0	£0.0	£0.1	£0.1	£0.1	£0.1	£0.0	£0.0	£0.0	£0.7	£0.4	£0.0	£0.0	£0.9	£0.0	£3.2	£0.0	£101.9
Lidl, Princes Road, CHELMSFORD, CM2 9DG	£0.1	£0.0	£0.0	£0.0	£0.1	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£18.5
Tesco, Princes Road, CHELMSFORD, CM2 9XW	£0.0	£0.2	£0.2	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.5	£1.4	£0.0	£0.4	£0.4	£0.0	£0.0	£0.0	£0.0	£87.7
Other - Chelmsford	£0.1	£0.0	£0.0	£0.0	£0.9	£0.0	£0.1	£0.0	£0.0	£0.0	£4.3	£0.0	£1.9	£0.5	£1.7	£0.0	£0.0	£0.0	£32.1
South Woodham Ferrers																			
Asda, 1-10 Queen Elizabeth II Square, South Woodham Ferrers, CHELMSFORD, CM3 5S	£0.3	£0.0	£0.0	£0.1	£0.2	£0.5	£0.0	£0.0	£0.2	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£51.5
Other	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.8
Outside Chelmsford City Area	£1.6	£4.0	£23.8	£0.5	£1.3	£1.8	£2.3	£5.2	£3.6	£6.9	£1.8	£2.9	£1.0	£1.7	£17.2	£12.7	£9.1	£27.8	£1,389.5

Notes: study area turnover calculated by multiplying market share for each store/centre (Table 4) by available expenditure (Table 3) for each study area zone.

Table 6: Market Share of Comparison Goods Facilities

LOCATION	clothing, footwear and other fashion goods																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	49.5%	14.8%	10.3%	52.8%	75.9%	45.0%	56.6%	45.5%	44.1%	5.6%	73.6%	72.5%	82.3%	75.1%	32.3%	3.0%	29.3%	52.4%
Chelmer Village	0.5%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great Baddow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%
Moulsham Lodge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
South Woodham Ferrers	10.2%	0.6%	0.0%	2.7%	0.9%	9.8%	0.0%	0.0%	10.9%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Out of centre, Chelmsford	3.5%	1.5%	0.7%	8.0%	3.3%	2.2%	9.3%	2.3%	3.9%	0.0%	9.7%	1.7%	2.1%	0.0%	0.0%	0.0%	2.5%	0.7%
Other	36.3%	83.1%	89.0%	35.1%	19.9%	42.9%	34.1%	52.2%	41.1%	91.7%	16.7%	25.7%	15.6%	24.1%	67.7%	97.0%	68.2%	46.8%

LOCATION	furniture, floor coverings and household textiles																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	14.1%	2.4%	1.6%	23.6%	40.7%	25.5%	13.1%	8.7%	19.3%	2.4%	39.0%	32.8%	43.7%	49.6%	21.6%	0.0%	12.2%	19.2%
Chelmer Village	1.1%	1.7%	0.9%	12.2%	3.7%	0.0%	10.2%	1.1%	1.3%	0.0%	0.0%	0.8%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%
Great Baddow	0.0%	0.0%	1.0%	3.6%	7.6%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%
Moulsham Lodge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
South Woodham Ferrers	8.5%	0.0%	0.0%	0.9%	1.8%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Out of centre, Chelmsford	7.8%	3.5%	0.0%	8.3%	5.0%	10.8%	18.0%	22.0%	5.7%	2.0%	39.3%	17.0%	19.4%	13.7%	1.9%	0.0%	1.5%	6.8%
Other	68.5%	92.3%	96.5%	51.4%	41.3%	61.4%	58.7%	68.1%	73.7%	95.6%	21.7%	49.4%	36.9%	34.2%	76.5%	####	86.3%	73.9%

LOCATION	DIY, hardware and decorating goods																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	8.5%	3.0%	3.2%	8.9%	17.0%	8.4%	4.2%	7.7%	12.2%	0.0%	8.0%	10.2%	22.7%	8.5%	3.5%	0.0%	0.0%	1.1%
Chelmer Village	3.0%	1.6%	0.0%	0.7%	0.0%	0.0%	1.8%	0.7%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great Baddow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%
Moulsham Lodge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
South Woodham Ferrers	6.7%	0.6%	0.0%	3.8%	0.0%	10.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Out of centre, Chelmsford	42.8%	5.7%	2.5%	67.5%	51.1%	18.3%	49.8%	30.8%	16.9%	0.8%	92.0%	85.3%	75.9%	79.1%	20.7%	7.1%	9.1%	19.0%
Other	39.0%	89.1%	94.3%	19.1%	31.9%	62.6%	44.2%	60.8%	70.9%	99.2%	0.0%	4.0%	1.5%	11.5%	75.8%	92.9%	90.9%	79.9%

Notes: market shares taken from 2015 household survey.

Table 6:

LOCATION	domestic appliances and utensils																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	14.9%	0.8%	1.9%	24.6%	25.3%	26.4%	5.5%	6.3%	29.1%	0.0%	20.1%	14.0%	38.3%	41.3%	7.4%	3.8%	5.1%	10.7%
Chelmer Village	4.5%	2.1%	1.0%	21.0%	15.8%	2.0%	16.8%	4.7%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great Baddow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Moulsham Lodge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
South Woodham Ferrers	7.9%	0.0%	0.0%	1.6%	0.0%	5.6%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Out of centre, Chelmsford	29.7%	2.1%	0.0%	24.7%	40.6%	20.7%	21.0%	16.3%	20.2%	0.0%	77.0%	58.6%	59.2%	40.8%	8.8%	2.8%	14.2%	23.2%
Other	43.0%	95.0%	97.1%	28.1%	18.3%	45.3%	56.7%	72.8%	46.8%	####	2.9%	27.4%	2.6%	17.9%	83.8%	93.4%	80.7%	66.1%

LOCATION	TV, Hi-Fi, Radio, photographic and computer equipment																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	12.5%	0.0%	1.9%	5.8%	16.6%	29.9%	6.1%	3.3%	33.1%	0.0%	34.2%	26.1%	41.5%	38.8%	8.1%	0.0%	14.9%	12.4%
Chelmer Village	2.1%	2.0%	0.0%	17.5%	8.1%	2.6%	22.0%	5.6%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great Baddow	0.0%	0.0%	0.0%	6.1%	6.5%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	1.4%	1.0%	6.1%	1.3%	0.0%	0.0%	0.0%
Moulsham Lodge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
South Woodham Ferrers	6.5%	0.0%	0.0%	1.0%	0.0%	1.5%	0.0%	0.0%	6.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Out of centre, Chelmsford	37.4%	2.0%	1.9%	45.3%	33.8%	22.6%	26.7%	23.3%	16.0%	0.0%	57.1%	51.1%	56.6%	37.1%	4.9%	5.4%	8.3%	26.9%
Other	41.6%	96.0%	96.2%	24.3%	35.0%	43.4%	45.3%	67.9%	43.6%	####	5.3%	21.4%	0.9%	18.0%	85.7%	94.6%	76.8%	60.7%

Notes:

Table 6:

LOCATION	books, CDs and DVDs 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	18.0%	4.0%	3.5%	30.5%	35.6%	38.7%	16.6%	27.4%	61.9%	4.3%	51.4%	58.2%	72.5%	58.9%	17.4%	4.8%	8.5%	23.8%
Chelmer Village	1.5%	4.6%	0.0%	1.2%	0.0%	0.0%	5.6%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great Baddow	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Moulsham Lodge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
South Woodham Ferrers	43.7%	6.6%	0.0%	14.5%	0.0%	15.5%	0.0%	0.0%	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Out of centre, Chelmsford	9.8%	3.3%	0.0%	32.7%	52.2%	3.7%	14.5%	4.5%	11.1%	0.0%	46.3%	25.6%	25.4%	33.4%	10.6%	0.0%	3.0%	10.5%
Other	27.0%	81.6%	96.5%	21.1%	10.2%	42.2%	63.2%	68.1%	23.3%	95.7%	1.1%	14.8%	2.1%	7.6%	72.0%	95.2%	88.5%	65.6%

LOCATION	goods for personal care, such as soaps, beauty products, medical goods 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	23.2%	2.8%	3.2%	20.8%	28.7%	14.7%	7.1%	11.5%	20.2%	0.7%	80.8%	66.8%	88.5%	84.1%	13.8%	4.7%	8.5%	13.7%
Chelmer Village	0.8%	1.5%	0.7%	1.9%	1.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	2.8%	0.8%	0.8%	0.0%	0.0%	0.0%	0.0%
Great Baddow	0.0%	0.0%	0.0%	5.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%
Moulsham Lodge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%
South Woodham Ferrers	59.2%	2.1%	0.0%	18.2%	5.5%	13.3%	0.0%	0.0%	8.2%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Out of centre, Chelmsford	1.5%	0.0%	0.0%	17.9%	12.3%	0.0%	1.7%	0.6%	1.6%	0.0%	16.8%	15.7%	1.4%	4.5%	0.0%	3.4%	7.1%	2.1%
Other	15.2%	93.5%	96.1%	35.7%	52.5%	71.9%	89.0%	87.9%	70.0%	97.2%	0.6%	14.8%	5.9%	9.9%	86.2%	91.9%	84.3%	84.1%

LOCATION	recreational and luxury goods including books, games, sports, pets and pet products, bicycles, jewellery 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	33.8%	6.3%	4.8%	36.3%	43.4%	32.0%	38.8%	28.4%	40.5%	2.8%	61.6%	57.0%	83.2%	71.8%	22.6%	2.3%	24.1%	22.4%
Chelmer Village	1.5%	2.6%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great Baddow	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Moulsham Lodge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
South Woodham Ferrers	21.1%	0.0%	0.0%	1.5%	1.4%	9.9%	0.0%	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Out of centre, Chelmsford	4.6%	1.9%	1.0%	13.2%	22.6%	3.6%	7.9%	3.0%	0.0%	0.0%	17.4%	16.7%	5.9%	16.4%	1.1%	0.0%	0.0%	0.0%
Other	39.0%	89.3%	94.2%	49.0%	29.7%	54.5%	49.7%	68.6%	56.0%	97.2%	21.0%	26.3%	10.9%	11.8%	76.2%	97.7%	75.9%	77.6%

Notes:

Table 7a: Turnover of Comparison Goods Facilities, 2015

LOCATION	clothing, footwear and other fashion goods 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£7.4	£2.0	£9.2	£1.7	£7.8	£4.2	£5.4	£8.5	£5.7	£1.6	£52.3	£11.2	£14.9	£14.7	£24.1	£1.3	£12.2	£49.2
Chelmer Village	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£1.5	£0.1	£0.0	£0.1	£0.1	£0.9	£0.0	£0.0	£1.4	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£0.5	£0.2	£0.6	£0.3	£0.3	£0.2	£0.9	£0.4	£0.5	£0.0	£6.9	£0.3	£0.4	£0.0	£0.0	£0.0	£1.0	£0.7
Other	£5.4	£11.4	£79.0	£1.1	£2.0	£4.0	£3.3	£9.7	£5.3	£26.0	£11.8	£4.0	£2.8	£4.7	£50.5	£42.8	£28.5	£43.9

LOCATION	furniture, floor coverings and household textiles 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£1.1	£0.2	£0.7	£0.4	£2.2	£1.3	£0.7	£0.9	£1.4	£0.4	£14.4	£2.7	£4.0	£4.9	£8.2	£0.0	£2.8	£9.6
Chelmer Village	£0.1	£0.1	£0.4	£0.2	£0.2	£0.0	£0.5	£0.1	£0.1	£0.0	£0.0	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.4	£0.1	£0.4	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£0.7	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£0.6	£0.2	£0.0	£0.1	£0.3	£0.6	£0.9	£2.2	£0.4	£0.3	£14.5	£1.4	£1.8	£1.4	£0.7	£0.0	£0.3	£3.4
Other	£5.4	£6.5	£42.4	£0.9	£2.3	£3.2	£3.0	£6.8	£5.3	£14.0	£8.0	£4.0	£3.4	£3.4	£28.9	£22.7	£19.6	£36.8

LOCATION	DIY, hardware and decorating goods 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£0.2	£0.1	£0.5	£0.1	£0.4	£0.2	£0.1	£0.3	£0.4	£0.0	£1.0	£0.3	£0.8	£0.3	£0.5	£0.0	£0.0	£0.2
Chelmer Village	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£0.2	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£1.0	£0.2	£0.4	£0.5	£1.1	£0.4	£1.0	£1.2	£0.5	£0.0	£11.7	£2.9	£2.7	£3.1	£3.1	£0.7	£0.9	£3.6
Other	£0.9	£2.6	£16.0	£0.1	£0.7	£1.3	£0.9	£2.5	£2.2	£5.8	£0.0	£0.1	£0.1	£0.5	£11.5	£8.6	£8.8	£15.1

Notes: study area derived turnover calculated by applying market shares in Table 6 to available comparison goods expenditure.

Table 7a: 1

LOCATION	domestic appliances and utensils																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£0.5	£0.0	£0.4	£0.2	£0.6	£0.6	£0.1	£0.3	£0.9	£0.0	£3.4	£0.5	£1.7	£1.9	£1.3	£0.4	£0.5	£2.4
Chelmer Village	£0.2	£0.1	£0.2	£0.2	£0.4	£0.0	£0.4	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£0.3	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£1.0	£0.1	£0.0	£0.2	£1.0	£0.5	£0.5	£0.7	£0.6	£0.0	£13.1	£2.2	£2.7	£1.9	£1.6	£0.3	£1.5	£5.1
Other	£1.5	£3.1	£19.9	£0.2	£0.4	£1.1	£1.3	£3.2	£1.5	£6.8	£0.5	£1.0	£0.1	£0.8	£14.9	£9.9	£8.5	£14.7

LOCATION	TV, Hi-Fi, Radio, photographic and computer equipment																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£0.6	£0.0	£0.6	£0.1	£0.6	£1.1	£0.2	£0.2	£1.6	£0.0	£9.4	£1.6	£3.0	£2.7	£2.3	£0.0	£2.5	£4.6
Chelmer Village	£0.1	£0.1	£0.0	£0.2	£0.3	£0.1	£0.8	£0.4	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.1	£0.1	£0.4	£0.4	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£0.3	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£1.7	£0.1	£0.6	£0.6	£1.3	£0.8	£0.9	£1.7	£0.8	£0.0	£15.6	£3.1	£4.1	£2.6	£1.4	£0.9	£1.4	£9.9
Other	£1.9	£4.7	£31.3	£0.3	£1.3	£1.6	£1.6	£4.8	£2.2	£10.1	£1.5	£1.3	£0.1	£1.3	£24.5	£16.1	£12.9	£22.3

Notes:

Table 7a: 1

LOCATION	books, CDs and DVDs 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£0.6	£0.1	£0.7	£0.2	£0.9	£0.9	£0.4	£1.2	£2.0	£0.3	£8.9	£2.2	£3.2	£2.8	£3.3	£0.5	£0.9	£5.4
Chelmer Village	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£1.4	£0.2	£0.0	£0.1	£0.0	£0.3	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£0.3	£0.1	£0.0	£0.3	£1.4	£0.1	£0.3	£0.2	£0.4	£0.0	£8.0	£1.0	£1.1	£1.6	£2.0	£0.0	£0.3	£2.4
Other	£0.8	£2.7	£20.5	£0.2	£0.3	£0.9	£1.5	£3.1	£0.8	£6.6	£0.2	£0.5	£0.1	£0.4	£13.5	£10.2	£9.2	£14.8

LOCATION	goods for personal care, such as soaps, beauty products, medical goods 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£2.0	£0.2	£1.6	£0.3	£1.7	£0.8	£0.4	£1.2	£1.6	£0.1	£32.3	£5.7	£9.2	£9.4	£5.8	£1.1	£2.0	£7.2
Chelmer Village	£0.1	£0.1	£0.4	£0.0	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.2	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£5.2	£0.2	£0.0	£0.3	£0.3	£0.7	£0.0	£0.0	£0.6	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£0.1	£0.0	£0.0	£0.3	£0.7	£0.0	£0.1	£0.1	£0.1	£0.0	£6.7	£1.3	£0.1	£0.5	£0.0	£0.8	£1.7	£1.1
Other	£1.3	£7.8	£48.1	£0.6	£3.1	£3.9	£4.9	£9.3	£5.5	£16.4	£0.2	£1.3	£0.6	£1.1	£36.1	£21.9	£19.9	£44.0

LOCATION	recreational and luxury goods including books, games, sports, pets and pet products, bicycles, jewellery 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	TOTAL
Chelmsford	£3.5	£0.6	£3.2	£0.9	£3.3	£2.1	£2.7	£4.0	£3.9	£0.6	£32.9	£6.4	£11.4	£10.2	£12.4	£0.7	£7.7	£16.1	£581.4
Chelmer Village	£0.2	£0.3	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£8.1
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.8
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
South Woodham Ferrers	£2.2	£0.0	£0.0	£0.0	£0.1	£0.7	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£20.6
Out of centre, Chelmsford	£0.5	£0.2	£0.6	£0.3	£1.7	£0.2	£0.6	£0.4	£0.0	£0.0	£9.3	£1.9	£0.8	£2.3	£0.6	£0.0	£0.0	£0.0	£210.4
Other	£4.1	£9.1	£61.6	£1.2	£2.2	£3.7	£3.5	£9.5	£5.4	£19.9	£11.2	£3.0	£1.5	£1.7	£41.8	£31.9	£24.4	£55.8	£1,463.5

Notes:

Table 7b: Turnover of Comparison Goods Facilities, 2020

LOCATION	clothing, footwear and other fashion goods																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£8.6	£2.4	£10.6	£1.9	£9.0	£4.9	£6.2	£9.8	£6.5	£1.8	£60.7	£13.0	£17.3	£17.1	£28.3	£1.6	£14.3	£57.4
Chelmer Village	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£1.8	£0.1	£0.0	£0.1	£0.1	£1.1	£0.0	£0.0	£1.6	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£0.6	£0.2	£0.7	£0.3	£0.4	£0.2	£1.0	£0.5	£0.6	£0.0	£8.0	£0.3	£0.4	£0.0	£0.0	£0.0	£1.2	£0.8
Other	£6.3	£13.2	£91.7	£1.3	£2.4	£4.7	£3.8	£11.2	£6.1	£29.9	£13.7	£4.6	£3.3	£5.5	£59.3	£51.3	£33.2	£51.3

LOCATION	furniture, floor coverings and household textiles																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£1.3	£0.2	£0.8	£0.5	£2.6	£1.5	£0.8	£1.0	£1.6	£0.4	£16.7	£3.1	£4.7	£5.7	£9.6	£0.0	£3.2	£11.2
Chelmer Village	£0.1	£0.1	£0.5	£0.2	£0.2	£0.0	£0.6	£0.1	£0.1	£0.0	£0.0	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.5	£0.1	£0.5	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£0.8	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£0.7	£0.3	£0.0	£0.2	£0.3	£0.7	£1.1	£2.5	£0.5	£0.3	£16.8	£1.6	£2.1	£1.6	£0.8	£0.0	£0.4	£4.0
Other	£6.2	£7.6	£49.2	£1.0	£2.6	£3.7	£3.5	£7.9	£6.1	£16.1	£9.3	£4.7	£3.9	£3.9	£33.9	£27.3	£22.8	£43.0

LOCATION	DIY, hardware and decorating goods																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£0.2	£0.1	£0.6	£0.1	£0.4	£0.2	£0.1	£0.4	£0.4	£0.0	£1.2	£0.4	£0.9	£0.4	£0.6	£0.0	£0.0	£0.2
Chelmer Village	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£0.2	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£1.2	£0.2	£0.5	£0.6	£1.3	£0.4	£1.2	£1.4	£0.6	£0.1	£13.5	£3.3	£3.1	£3.6	£3.7	£0.8	£1.0	£4.2
Other	£1.1	£3.0	£18.6	£0.2	£0.8	£1.5	£1.0	£2.8	£2.5	£6.6	£0.0	£0.2	£0.1	£0.5	£13.6	£10.4	£10.3	£17.6

Notes: study area derived turnover calculated by applying market shares in Table 6 to available comparison goods expenditure.

Table 7b: 1

LOCATION	domestic appliances and utensils																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£0.6	£0.0	£0.5	£0.2	£0.7	£0.7	£0.1	£0.3	£1.1	£0.0	£4.0	£0.6	£2.0	£2.2	£1.5	£0.5	£0.6	£2.8
Chelmer Village	£0.2	£0.1	£0.2	£0.2	£0.4	£0.1	£0.4	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£0.3	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£1.2	£0.1	£0.0	£0.2	£1.1	£0.6	£0.6	£0.8	£0.7	£0.0	£15.2	£2.5	£3.1	£2.2	£1.8	£0.4	£1.7	£6.0
Other	£1.7	£3.6	£23.1	£0.3	£0.5	£1.2	£1.5	£3.7	£1.7	£7.8	£0.6	£1.2	£0.1	£0.9	£17.5	£11.8	£9.9	£17.1

LOCATION	TV, Hi-Fi, Radio, photographic and computer equipment																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£0.7	£0.0	£0.7	£0.1	£0.7	£1.3	£0.2	£0.3	£1.9	£0.0	£10.9	£1.8	£3.5	£3.1	£2.7	£0.0	£2.9	£5.3
Chelmer Village	£0.1	£0.1	£0.0	£0.2	£0.3	£0.1	£0.9	£0.5	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.1	£0.1	£0.5	£0.5	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£0.4	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£2.0	£0.1	£0.7	£0.6	£1.5	£1.0	£1.1	£1.9	£0.9	£0.0	£18.1	£3.6	£4.8	£3.0	£1.6	£1.1	£1.6	£11.5
Other	£2.2	£5.5	£36.3	£0.3	£1.5	£1.8	£1.8	£5.6	£2.5	£11.6	£1.7	£1.5	£0.1	£1.5	£28.8	£19.3	£15.0	£26.0

Notes:

Table 7b: T

LOCATION	books, CDs and DVDs 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£0.7	£0.2	£0.9	£0.3	£1.1	£1.0	£0.4	£1.4	£2.3	£0.3	£10.4	£2.5	£3.7	£3.3	£3.8	£0.6	£1.0	£6.3
Chelmer Village	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£1.6	£0.3	£0.0	£0.1	£0.0	£0.4	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£0.4	£0.1	£0.0	£0.3	£1.6	£0.1	£0.4	£0.2	£0.4	£0.0	£9.3	£1.1	£1.3	£1.9	£2.3	£0.0	£0.4	£2.8
Other	£1.0	£3.2	£23.8	£0.2	£0.3	£1.1	£1.7	£3.5	£0.9	£7.6	£0.2	£0.6	£0.1	£0.4	£15.9	£12.2	£10.8	£17.3

LOCATION	goods for personal care, such as soaps, beauty products, medical goods 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£2.4	£0.3	£1.9	£0.4	£2.0	£0.9	£0.5	£1.4	£1.8	£0.1	£37.5	£6.6	£10.6	£10.9	£6.8	£1.3	£2.3	£8.4
Chelmer Village	£0.1	£0.1	£0.4	£0.0	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.3	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£6.0	£0.2	£0.0	£0.3	£0.4	£0.8	£0.0	£0.0	£0.7	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£0.2	£0.0	£0.0	£0.3	£0.8	£0.0	£0.1	£0.1	£0.1	£0.0	£7.8	£1.5	£0.2	£0.6	£0.0	£1.0	£2.0	£1.3
Other	£1.5	£9.0	£55.8	£0.7	£3.6	£4.5	£5.7	£10.7	£6.3	£18.8	£0.3	£1.5	£0.7	£1.3	£42.5	£26.3	£23.2	£51.3

LOCATION	recreational and luxury goods including books, games, sports, pets and pet products, bicycles, jewellery 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	TOTAL
Chelmsford	£4.1	£0.7	£3.7	£1.0	£3.8	£2.5	£3.1	£4.6	£4.5	£0.7	£38.1	£7.5	£13.2	£11.8	£14.6	£0.9	£9.0	£18.8	£675.9
Chelmer Village	£0.2	£0.3	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£9.4
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.6
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6
South Woodham Ferrers	£2.6	£0.0	£0.0	£0.0	£0.1	£0.8	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£23.8
Out of centre, Chelmsford	£0.6	£0.2	£0.7	£0.4	£2.0	£0.3	£0.6	£0.5	£0.0	£0.0	£10.8	£2.2	£0.9	£2.7	£0.7	£0.0	£0.0	£0.0	£244.4
Other	£4.7	£10.6	£71.5	£1.4	£2.6	£4.2	£4.0	£11.0	£6.2	£22.8	£13.0	£3.5	£1.7	£1.9	£49.1	£38.2	£28.4	£65.2	£1,707.7

Notes:

Table 7c: Turnover of Comparison Goods Facilities, 2025

clothing, footwear and other fashion goods

LOCATION	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£10.4	£2.8	£12.9	£2.3	£10.9	£5.9	£7.5	£11.8	£7.9	£2.2	£73.4	£15.8	£20.9	£20.7	£34.7	£2.0	£17.3	£70.0
Chelmer Village	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£2.1	£0.1	£0.0	£0.1	£0.1	£1.3	£0.0	£0.0	£2.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£0.7	£0.3	£0.9	£0.4	£0.5	£0.3	£1.2	£0.6	£0.7	£0.0	£9.7	£0.4	£0.5	£0.0	£0.0	£0.0	£1.5	£1.0
Other	£7.6	£16.0	£111.2	£1.6	£2.9	£5.6	£4.5	£13.5	£7.3	£36.0	£16.6	£5.6	£4.0	£6.6	£72.8	£64.0	£40.4	£62.5

furniture, floor coverings and household textiles

LOCATION	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£1.5	£0.2	£1.0	£0.6	£3.1	£1.9	£0.9	£1.2	£1.9	£0.5	£20.2	£3.8	£5.6	£6.9	£11.8	£0.0	£3.9	£13.7
Chelmer Village	£0.1	£0.2	£0.6	£0.3	£0.3	£0.0	£0.7	£0.2	£0.1	£0.0	£0.0	£0.1	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.6	£0.1	£0.6	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£0.9	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£0.9	£0.3	£0.0	£0.2	£0.4	£0.8	£1.3	£3.1	£0.6	£0.4	£20.3	£2.0	£2.5	£1.9	£1.0	£0.0	£0.5	£4.8
Other	£7.5	£9.1	£59.7	£1.2	£3.2	£4.5	£4.2	£9.5	£7.3	£19.3	£11.3	£5.7	£4.8	£4.8	£41.7	£34.0	£27.8	£52.4

DIY, hardware and decorating goods

LOCATION	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£0.3	£0.1	£0.8	£0.1	£0.5	£0.2	£0.1	£0.4	£0.5	£0.0	£1.4	£0.5	£1.1	£0.5	£0.8	£0.0	£0.0	£0.3
Chelmer Village	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£0.2	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£1.4	£0.2	£0.6	£0.7	£1.6	£0.5	£1.4	£1.7	£0.7	£0.1	£16.4	£4.1	£3.8	£4.4	£4.5	£1.0	£1.3	£5.1
Other	£1.3	£3.6	£22.5	£0.2	£1.0	£1.8	£1.2	£3.4	£3.1	£8.0	£0.0	£0.2	£0.1	£0.6	£16.7	£12.9	£12.5	£21.4

Notes: study area derived turnover calculated by applying market shares in Table 6 to available comparison goods expenditure.

Table 7c

LOCATION	domestic appliances and utensils																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£0.7	£0.0	£0.6	£0.3	£0.9	£0.9	£0.2	£0.4	£1.3	£0.0	£4.8	£0.7	£2.4	£2.6	£1.9	£0.6	£0.8	£3.4
Chelmer Village	£0.2	£0.1	£0.3	£0.2	£0.5	£0.1	£0.5	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£0.4	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£1.5	£0.1	£0.0	£0.3	£1.4	£0.7	£0.7	£1.0	£0.9	£0.0	£18.4	£3.1	£3.8	£2.6	£2.2	£0.4	£2.1	£7.3
Other	£2.1	£4.4	£28.1	£0.3	£0.6	£1.5	£1.8	£4.5	£2.0	£9.4	£0.7	£1.4	£0.2	£1.1	£21.5	£14.8	£12.0	£20.9

LOCATION	TV, Hi-Fi, Radio, photographic and computer equipment																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£0.8	£0.0	£0.9	£0.1	£0.9	£1.5	£0.3	£0.3	£2.3	£0.0	£13.1	£2.2	£4.2	£3.8	£3.3	£0.0	£3.6	£6.5
Chelmer Village	£0.1	£0.1	£0.0	£0.3	£0.4	£0.1	£1.1	£0.5	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.1	£0.1	£0.6	£0.6	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£0.4	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£2.4	£0.1	£0.9	£0.8	£1.8	£1.2	£1.3	£2.3	£1.1	£0.0	£21.9	£4.4	£5.8	£3.6	£2.0	£1.4	£2.0	£14.1
Other	£2.7	£6.6	£44.0	£0.4	£1.8	£2.2	£2.2	£6.7	£3.0	£13.9	£2.0	£1.8	£0.1	£1.8	£35.4	£24.0	£18.3	£31.7

Notes:

Table 7c

LOCATION	books, CDs and DVDs 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£0.8	£0.2	£1.1	£0.3	£1.3	£1.2	£0.5	£1.7	£2.8	£0.4	£12.6	£3.1	£4.5	£4.0	£4.7	£0.8	£1.3	£7.6
Chelmer Village	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£1.9	£0.3	£0.0	£0.2	£0.0	£0.5	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£0.4	£0.2	£0.0	£0.4	£1.9	£0.1	£0.5	£0.3	£0.5	£0.0	£11.3	£1.3	£1.6	£2.2	£2.9	£0.0	£0.4	£3.4
Other	£1.2	£3.8	£28.9	£0.2	£0.4	£1.3	£2.0	£4.2	£1.0	£9.1	£0.3	£0.8	£0.1	£0.5	£19.5	£15.2	£13.1	£21.0

LOCATION	goods for personal care, such as soaps, beauty products, medical goods 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£2.9	£0.3	£2.3	£0.5	£2.4	£1.1	£0.5	£1.7	£2.2	£0.2	£45.4	£8.0	£12.9	£13.2	£8.3	£1.7	£2.9	£10.2
Chelmer Village	£0.1	£0.2	£0.5	£0.0	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.3	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£7.3	£0.2	£0.0	£0.4	£0.5	£1.0	£0.0	£0.0	£0.9	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£0.2	£0.0	£0.0	£0.4	£1.0	£0.0	£0.1	£0.1	£0.2	£0.0	£9.4	£1.9	£0.2	£0.7	£0.0	£1.2	£2.4	£1.6
Other	£1.9	£10.9	£67.7	£0.8	£4.3	£5.4	£6.8	£12.9	£7.6	£22.6	£0.3	£1.8	£0.9	£1.6	£52.2	£32.8	£28.2	£62.6

LOCATION	recreational and luxury goods including books, games, sports, pets and pet products, bicycles, jewellery 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	TOTAL
Chelmsford	£5.0	£0.9	£4.4	£1.2	£4.6	£3.0	£3.8	£5.5	£5.4	£0.8	£46.1	£9.1	£16.0	£14.3	£17.9	£1.1	£11.0	£23.0	£820.6
Chelmer Village	£0.2	£0.4	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£11.3
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.8
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7
South Woodham Ferrers	£3.1	£0.0	£0.0	£0.1	£0.2	£0.9	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£28.7
Out of centre, Chelmsford	£0.7	£0.3	£0.9	£0.4	£2.4	£0.3	£0.8	£0.6	£0.0	£0.0	£13.0	£2.7	£1.1	£3.3	£0.9	£0.0	£0.0	£0.0	£296.4
Other	£5.7	£12.8	£86.7	£1.6	£3.1	£5.1	£4.8	£13.2	£7.4	£27.5	£15.7	£4.2	£2.1	£2.3	£60.3	£47.6	£34.6	£79.4	£2,081.7

Notes:

Table 7d: Turnover of Comparison Goods Facilities, 2030

clothing, footwear and other fashion goods

LOCATION	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£12.6	£3.5	£15.7	£2.8	£13.3	£7.2	£9.1	£14.3	£9.5	£2.7	£89.2	£19.3	£25.5	£25.2	£42.8	£2.5	£21.1	£85.4
Chelmer Village	£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£2.6	£0.1	£0.0	£0.1	£0.2	£1.6	£0.0	£0.0	£2.4	£1.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£0.9	£0.4	£1.0	£0.4	£0.6	£0.4	£1.5	£0.7	£0.8	£0.0	£11.8	£0.5	£0.6	£0.0	£0.0	£0.0	£1.8	£1.2
Other	£9.3	£19.5	£135.4	£1.9	£3.5	£6.8	£5.5	£16.4	£8.9	£43.6	£20.2	£6.9	£4.8	£8.1	£89.7	£79.4	£49.2	£76.3

furniture, floor coverings and household textiles

LOCATION	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£1.9	£0.3	£1.2	£0.7	£3.8	£2.3	£1.1	£1.5	£2.3	£0.6	£24.5	£4.6	£6.9	£8.4	£14.5	£0.0	£4.8	£16.7
Chelmer Village	£0.1	£0.2	£0.7	£0.3	£0.3	£0.0	£0.9	£0.2	£0.2	£0.0	£0.0	£0.1	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.8	£0.1	£0.7	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£1.1	£0.0	£0.0	£0.0	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£1.0	£0.4	£0.0	£0.2	£0.5	£1.0	£1.5	£3.7	£0.7	£0.5	£24.7	£2.4	£3.1	£2.3	£1.3	£0.0	£0.6	£5.9
Other	£9.1	£11.1	£72.7	£1.5	£3.9	£5.4	£5.1	£11.5	£8.9	£23.4	£13.7	£6.9	£5.8	£5.8	£51.4	£42.2	£33.8	£64.0

DIY, hardware and decorating goods

LOCATION	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£0.3	£0.1	£0.9	£0.1	£0.6	£0.3	£0.1	£0.5	£0.6	£0.0	£1.7	£0.6	£1.4	£0.6	£0.9	£0.0	£0.0	£0.4
Chelmer Village	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£0.3	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£1.7	£0.3	£0.7	£0.9	£1.9	£0.6	£1.7	£2.1	£0.9	£0.1	£19.9	£5.0	£4.6	£5.3	£5.6	£1.2	£1.5	£6.2
Other	£1.6	£4.4	£27.4	£0.2	£1.2	£2.2	£1.5	£4.2	£3.7	£9.7	£0.0	£0.2	£0.1	£0.8	£20.5	£16.0	£15.2	£26.2

Notes: study area derived turnover calculated by applying market shares in Table 6 to available comparison goods expenditure.

Table 7d: T

LOCATION	domestic appliances and utensils 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£0.9	£0.0	£0.7	£0.3	£1.0	£1.0	£0.2	£0.5	£1.5	£0.0	£5.9	£0.9	£3.0	£3.2	£2.3	£0.7	£0.9	£4.1
Chelmer Village	£0.3	£0.1	£0.4	£0.3	£0.7	£0.1	£0.6	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£0.5	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£1.8	£0.1	£0.0	£0.3	£1.7	£0.8	£0.8	£1.2	£1.1	£0.0	£22.4	£3.8	£4.6	£3.2	£2.8	£0.5	£2.6	£8.9
Other	£2.6	£5.4	£34.2	£0.4	£0.8	£1.8	£2.2	£5.4	£2.5	£11.4	£0.8	£1.8	£0.2	£1.4	£26.5	£18.3	£14.6	£25.5

LOCATION	TV, Hi-Fi, Radio, photographic and computer equipment 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£1.0	£0.0	£1.0	£0.1	£1.1	£1.9	£0.4	£0.4	£2.7	£0.0	£16.0	£2.7	£5.1	£4.6	£4.1	£0.0	£4.3	£7.9
Chelmer Village	£0.2	£0.2	£0.0	£0.4	£0.5	£0.2	£1.3	£0.7	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.1	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£0.2	£0.1	£0.7	£0.7	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£0.5	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£3.0	£0.2	£1.1	£0.9	£2.1	£1.4	£1.6	£2.8	£1.3	£0.0	£26.6	£5.3	£7.0	£4.4	£2.5	£1.7	£2.4	£17.2
Other	£3.3	£8.1	£53.6	£0.5	£2.2	£2.7	£2.7	£8.1	£3.6	£16.9	£2.5	£2.2	£0.1	£2.2	£43.6	£29.8	£22.3	£38.7

Notes:

Table 7d: 1

LOCATION	books, CDs and DVDs 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£1.0	£0.2	£1.3	£0.4	£1.6	£1.5	£0.6	£2.1	£3.3	£0.5	£15.2	£3.7	£5.5	£4.8	£5.8	£1.0	£1.5	£9.3
Chelmer Village	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£2.3	£0.4	£0.0	£0.2	£0.0	£0.6	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£0.5	£0.2	£0.0	£0.4	£2.3	£0.1	£0.6	£0.3	£0.6	£0.0	£13.7	£1.6	£1.9	£2.7	£3.5	£0.0	£0.5	£4.1
Other	£1.4	£4.7	£35.2	£0.3	£0.5	£1.6	£2.4	£5.1	£1.3	£11.1	£0.3	£0.9	£0.2	£0.6	£24.0	£18.9	£16.0	£25.7

LOCATION	goods for personal care, such as soaps, beauty products, medical goods 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£3.5	£0.4	£2.8	£0.6	£2.9	£1.3	£0.7	£2.0	£2.7	£0.2	£55.1	£9.8	£15.7	£16.0	£10.3	£2.1	£3.5	£12.5
Chelmer Village	£0.1	£0.2	£0.6	£0.1	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.4	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£8.9	£0.3	£0.0	£0.5	£0.6	£1.2	£0.0	£0.0	£1.1	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£0.2	£0.0	£0.0	£0.5	£1.2	£0.0	£0.2	£0.1	£0.2	£0.0	£11.4	£2.3	£0.3	£0.9	£0.0	£1.5	£2.9	£1.9
Other	£2.3	£13.2	£82.4	£1.0	£5.3	£6.6	£8.2	£15.6	£9.2	£27.4	£0.4	£2.2	£1.0	£1.9	£64.3	£40.7	£34.4	£76.4

LOCATION	recreational and luxury goods including books, games, sports, pets and pet products, bicycles, jewellery 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	TOTAL
Chelmsford	£6.0	£1.1	£5.4	£1.5	£5.6	£3.6	£4.5	£6.7	£6.5	£1.0	£56.0	£11.1	£19.4	£17.4	£22.1	£1.4	£13.4	£28.0	£999.6
Chelmer Village	£0.3	£0.4	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£13.8
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£8.2
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9
South Woodham Ferrers	£3.8	£0.0	£0.0	£0.1	£0.2	£1.1	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£34.9
Out of centre, Chelmsford	£0.8	£0.3	£1.1	£0.5	£2.9	£0.4	£0.9	£0.7	£0.0	£0.0	£15.8	£3.3	£1.4	£4.0	£1.1	£0.0	£0.0	£0.0	£360.8
Other	£7.0	£15.5	£105.7	£2.0	£3.8	£6.2	£5.8	£16.1	£9.0	£33.2	£19.1	£5.1	£2.5	£2.9	£74.3	£59.1	£42.2	£96.9	£2,544.3

Notes:

Table 7e: Turnover of Comparison Goods Facilities, 2036

LOCATION	clothing, footwear and other fashion goods																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£16.1	£4.4	£20.0	£3.6	£17.0	£9.1	£11.5	£18.1	£12.0	£3.4	£113.4	£24.6	£32.4	£32.1	£55.2	£3.2	£27.0	£109.2
Chelmer Village	£0.2	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£3.3	£0.2	£0.0	£0.2	£0.2	£2.0	£0.0	£0.0	£3.0	£1.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£1.1	£0.5	£1.3	£0.5	£0.7	£0.5	£1.9	£0.9	£1.1	£0.0	£15.0	£0.6	£0.8	£0.0	£0.0	£0.0	£2.3	£1.5
Other	£11.8	£24.8	£173.0	£2.4	£4.5	£8.7	£6.9	£20.8	£11.2	£55.2	£25.7	£8.7	£6.2	£10.3	£115.8	£102.9	£62.8	£97.5

LOCATION	furniture, floor coverings and household textiles																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£2.4	£0.4	£1.6	£0.9	£4.9	£2.9	£1.4	£1.9	£2.9	£0.8	£31.1	£5.9	£8.7	£10.7	£18.7	£0.0	£6.1	£21.3
Chelmer Village	£0.2	£0.3	£0.9	£0.4	£0.4	£0.0	£1.1	£0.2	£0.2	£0.0	£0.0	£0.2	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£1.0	£0.1	£0.9	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£1.4	£0.0	£0.0	£0.0	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£1.3	£0.5	£0.0	£0.3	£0.6	£1.2	£2.0	£4.7	£0.9	£0.6	£31.4	£3.0	£3.9	£3.0	£1.6	£0.0	£0.7	£7.6
Other	£11.6	£14.2	£92.9	£1.9	£4.9	£6.9	£6.4	£14.6	£11.2	£29.7	£17.4	£8.8	£7.4	£7.4	£66.3	£54.7	£43.2	£81.8

LOCATION	DIY, hardware and decorating goods																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£0.4	£0.2	£1.2	£0.1	£0.8	£0.4	£0.2	£0.7	£0.8	£0.0	£2.2	£0.8	£1.7	£0.7	£1.2	£0.0	£0.0	£0.5
Chelmer Village	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£0.3	£0.0	£0.0	£0.1	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£2.2	£0.4	£0.9	£1.1	£2.4	£0.8	£2.1	£2.7	£1.1	£0.1	£25.2	£6.3	£5.9	£6.8	£7.2	£1.6	£1.9	£8.0
Other	£2.0	£5.6	£35.0	£0.3	£1.5	£2.8	£1.9	£5.3	£4.7	£12.3	£0.0	£0.3	£0.1	£1.0	£26.5	£20.8	£19.5	£33.5

Notes: study area derived turnover calculated by applying market shares in Table 6 to available comparison goods expenditure.

Table 7e: 1

LOCATION	domestic appliances and utensils																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£1.1	£0.1	£0.9	£0.4	£1.3	£1.3	£0.3	£0.6	£1.9	£0.0	£7.4	£1.1	£3.8	£4.1	£3.0	£1.0	£1.2	£5.3
Chelmer Village	£0.3	£0.1	£0.4	£0.4	£0.8	£0.1	£0.8	£0.4	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£0.6	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£2.2	£0.1	£0.0	£0.4	£2.1	£1.0	£1.0	£1.5	£1.3	£0.0	£28.4	£4.8	£5.8	£4.1	£3.6	£0.7	£3.3	£11.4
Other	£3.3	£6.8	£43.6	£0.5	£1.0	£2.3	£2.8	£6.9	£3.1	£14.4	£1.1	£2.2	£0.3	£1.8	£34.2	£23.8	£18.7	£32.6

LOCATION	TV, Hi-Fi, Radio, photographic and computer equipment																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£1.3	£0.0	£1.3	£0.2	£1.3	£2.4	£0.5	£0.5	£3.4	£0.0	£20.3	£3.5	£6.5	£5.9	£5.3	£0.0	£5.5	£10.1
Chelmer Village	£0.2	£0.2	£0.0	£0.5	£0.7	£0.2	£1.6	£0.8	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.2	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0	£0.2	£0.2	£0.9	£0.9	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£0.7	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£3.8	£0.2	£1.4	£1.2	£2.7	£1.8	£2.0	£3.5	£1.7	£0.0	£33.9	£6.8	£8.9	£5.6	£3.2	£2.2	£3.1	£21.9
Other	£4.2	£10.3	£68.5	£0.6	£2.8	£3.4	£3.4	£10.3	£4.5	£21.4	£3.2	£2.8	£0.1	£2.7	£56.2	£38.6	£28.5	£49.4

Notes:

Table 7e: 1

LOCATION	books, CDs and DVDs 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£1.2	£0.3	£1.6	£0.5	£2.0	£1.9	£0.8	£2.6	£4.2	£0.6	£19.4	£4.8	£7.0	£6.1	£7.5	£1.2	£2.0	£11.9
Chelmer Village	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£3.0	£0.5	£0.0	£0.2	£0.0	£0.7	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£0.7	£0.2	£0.0	£0.6	£3.0	£0.2	£0.7	£0.4	£0.8	£0.0	£17.4	£2.1	£2.5	£3.5	£4.6	£0.0	£0.7	£5.3
Other	£1.8	£6.0	£45.0	£0.4	£0.6	£2.0	£3.1	£6.5	£1.6	£14.0	£0.4	£1.2	£0.2	£0.8	£31.0	£24.5	£20.4	£32.8

LOCATION	goods for personal care, such as soaps, beauty products, medical goods 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Chelmsford	£4.4	£0.5	£3.5	£0.7	£3.7	£1.7	£0.8	£2.6	£3.4	£0.3	£70.1	£12.4	£19.9	£20.4	£13.2	£2.7	£4.4	£15.9
Chelmer Village	£0.2	£0.3	£0.8	£0.1	£0.1	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.5	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0
Great Baddow	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0
South Woodham Ferrers	£11.3	£0.4	£0.0	£0.6	£0.7	£1.6	£0.0	£0.0	£1.4	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Out of centre, Chelmsford	£0.3	£0.0	£0.0	£0.6	£1.6	£0.0	£0.2	£0.1	£0.3	£0.0	£14.5	£2.9	£0.3	£1.1	£0.0	£2.0	£3.7	£2.5
Other	£2.9	£16.8	£105.3	£1.3	£6.7	£8.4	£10.4	£19.8	£11.7	£34.7	£0.5	£2.8	£1.3	£2.4	£82.9	£52.8	£43.9	£97.6

LOCATION	recreational and luxury goods including books, games, sports, pets and pet products, bicycles, jewellery 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	TOTAL
Chelmsford	£7.7	£1.4	£6.9	£1.9	£7.1	£4.6	£5.7	£8.4	£8.2	£1.2	£71.2	£14.2	£24.7	£22.2	£28.5	£1.8	£17.1	£35.8	£1,274.7
Chelmer Village	£0.3	£0.6	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£17.5
Great Baddow	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£10.5
Moulsham Lodge	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1
South Woodham Ferrers	£4.8	£0.0	£0.0	£0.1	£0.2	£1.4	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£44.3
Out of centre, Chelmsford	£1.0	£0.4	£1.4	£0.7	£3.7	£0.5	£1.2	£0.9	£0.0	£0.0	£20.1	£4.2	£1.7	£5.1	£1.4	£0.0	£0.0	£0.0	£459.6
Other	£8.9	£19.8	£135.0	£2.5	£4.9	£7.9	£7.4	£20.4	£11.3	£42.1	£24.3	£6.5	£3.2	£3.6	£95.9	£76.6	£53.9	£123.9	£3,255.8

Notes:

Table 8: Convenience Floorspace Benchmark Turnover, 2015

	Total Net Flsp (Note A) (sqm)	Net Conv Ratio (Note B) (%)	Net Convenience (sqm)	Co Average Sales (Note C) (£ per sqm net)	Average Turnover 2015 (£m)
CHELMSFORD CITY CENTRE					
Tesco Springfield Road	3,032	76%	2,295	11,619	26.7
Tesco Express, Duke Street	273	95%	259	11,619	3.0
Tesco Express, Moulsham Street	173	95%	164	11,619	1.9
Iceland	654	95%	621	7,313	4.5
Marks & Spencer	1,185	95%	1,125	11,119	12.5
Marks & Spencer Simply Food	186	95%	177	11,119	2.0
Co-op	238	95%	226	7,823	1.8
Other	4,047	95%	3,845	5,000	19.2
Sub-total			**8,713**	**8,218**	**71.6**
SOUTH WOODHAM FERRERS TOWN CENTRE					
Asda, South Woodham Ferrers	4,073	71%	2,892	13,350	38.6
Other	*111*	*100%*	111	*4,500*	0.5
Sub-total			**3,003**	**13,023**	**39.1**
NEIGHBOURHOOD CENTRES					
Asda, Chelmer Village	3,209	70%	2,246	13,350	30.0
Co-Op, The Vineyards, Great Baddow	312	100%	312	7,823	2.4
Other, The Vineyards, Great Baddow	133	100%	133	4,500	0.6
Morrisons, North Melbourne	2,081	90%	1,873	12,857	24.1
Gloucester Road, Moulsham Lodge	*478*	*100%*	478	*4,500*	2.2
Sub-total			**5,042**	**11,752**	**59.3**
LOCAL CENTRES					**25.4**
CHELMSFORD OUT-OF-CENTRE					
Tesco, Princes Road	4,667	80%	3,734	11,619	43.4
Sainsbury's, Springfield	6,620	80%	5,296	12,181	64.5
Aldi, Springfield Road	754	90%	678	8,500	5.8
Lidl, Princes Road, Moulsham Lodge Retail Park	929	95%	883	2,987	2.6
Farmfoods, Moulsham Lodge Retail Park	305	100%	305	5,702	1.7
Sub-total			**10,590**	**11,145**	**118.0**
TOTAL					**313.4**

Notes: Floorspace figures dervied from IGD, Experian Goad, GVA surveys, planning application for City Council data. Sales densities from Verdict (2014).

Table 9a: Convenience Goods Commitments

	Net Convenience (sqm)	Benchmark Sales Density (£ per sqm net)	Average Turnover 2015 (£m)	Average Turnover 2020 (£m)	Average Turnover 2025 (£m)	Average Turnover 2030 (£m)	Average Turnover 2036 (£m)
Waitrose, Victoria Road (ref: 12/00833/FUL)	1,828	12,561	23.0	22.7	22.6	22.4	22.3
New retail store, Land East of North Court Road (ref: 13/00409/FUL)	370	7,500	2.8	2.7	2.7	2.7	2.7
New Nisa retail store, 1 Church Road, Boreham, Chelmsford	332	7,500	2.5	2.5	2.4	2.4	2.4
Aldi, Parkway (ref: 13/01328/FUL)	826	8,500	7.0	6.9	6.9	6.9	6.8
Total	**3,356**		**35.2**	**34.8**	**34.6**	**34.4**	**34.2**

Source: Chelmsford City Council and planning application data. Convenience/comparison split based on GVA assumptions. Benchmark sales density taken from Verdict and GVA assumptions.

Table 9b: Comparison Goods Commitments

	Net Comparison (sqm)	Benchmark Sales Density (£ per sqm net)	Average Turnover 2015 (£m)	Average Turnover 2020 (£m)	Average Turnover 2025 (£m)	Average Turnover 2030 (£m)	Average Turnover 2036 (£m)
John Lewis Department Store, Land East of High Street (ref: 12/01058/FUL)	8,656	£9,138	£79.1	£87.6	£97.5	£108.7	£123.8
Land East of High Street (ref: 12/01058/FUL)	8,218	£7,000	£57.5	£63.7	£70.9	£79.0	£90.1
Extension to Units 12-20, High Chelmer Shopping Centre (ref: 12/01492/FUL)	643	£7,000	£4.5	£5.0	£5.5	£6.2	£7.0
New Garden Centre Sales Building, Homelands Retail Park (ref:12/01284/FUL)	372	£1,650	£0.6	£0.7	£0.8	£0.8	£1.0
Waitrose, Victoria Road (ref: 12/00833/FUL)	445	£6,990	£3.1	£3.4	£3.8	£4.3	£4.9
Mezzanine floors, Riverside Retail Park	1,598	£7,000	£11.2	£12.4	£13.8	£15.4	£17.5
Total	**19,931**	**38,778**	**£156.0**	**£172.8**	**£192.3**	**£214.4**	**£244.3**

Source: Chelmsford City Council and planning application data.

Table 10a: Convenience Goods Floorspace Capacity - Chelmsford

	2015	2020	2025	2030	2036
Available convenience goods expenditure (£m)	£1,467.9	£1,547.7	£1,651.3	£1,754.9	£1,885.2
Turnover derived from study area (£m)	£342.6	£360.3	£383.2	£406.1	£435.1
Market share (%)	23.3%	23.3%	23.2%	23.1%	23.1%
Expenditure inflow (£m)	£0.0	£0.0	£0.0	£0.0	£0.0
Total turnover potential (£m)	£342.6	£360.3	£383.2	£406.1	£435.1
Benchmark turnover of existing stores (£m)	£274.3	£271.0	£269.4	£268.0	£266.4
Commitments (£m)	£35.2	£34.8	£34.6	£34.4	£34.2
Residual expenditure (£m)	**£33.1**	**£54.5**	**£79.2**	**£103.7**	**£134.5**
Indicative sales density for convenience goods floorspace (£/sq m)	£12,000	11,856.7	11,785.7	11,726.9	11,656.7
Indicative convenience goods floorspace capacity (sq m net)	**2,759**	**4,594**	**6,721**	**8,842**	**11,535**

Notes:

Available convenience goods expenditure taken from Tables 3a-3e.
Study area derived turnover taken from Tables 5a-5e.
Market share is study area derived turnover expressed as a proportion of total available expenditure.
Assumed that expenditure inflow into the study area for Chelmsford is 0%.
Benchmark turnover taken from Table 8.
Commitments taken from Table 9a.
Residual expenditure is the total turnover potential minus benchmark and commitments turnover.
Sales density for new convenience goods floorspace is indicative only.

Table 10b: Convenience Goods Floorspace Capacity - South Woodham Ferrers (Constant Market Share)

	2015	2020	2025	2030	2036
Available convenience goods expenditure (£m)	£1,467.9	£1,547.7	£1,651.3	£1,754.9	£1,885.2
Turnover derived from study area (£m)	£44.2	£46.2	£49.0	£51.8	£55.3
Market share (%)	3.0%	3.0%	3.0%	3.0%	2.9%
Expenditure inflow (£m)	£4.0	£4.2	£4.4	£4.7	£5.0
Total turnover potential (£m)	£48.2	£50.4	£53.4	£56.5	£60.3
Benchmark turnover of existing stores (£m)	£39.1	£38.6	£38.4	£38.2	£38.0
Commitments (£m)	£0.0	£0.0	£0.0	£0.0	£0.0
Residual expenditure (£m)	**£9.1**	**£11.8**	**£15.0**	**£18.2**	**£22.3**
Indicative sales density for convenience goods floorspace (£/sq m)	£12,000	£11,857	£11,786	£11,727	£11,657
Indicative convenience goods floorspace capacity (sq m net)	**757**	**992**	**1,273**	**1,556**	**1,916**

Notes:

Available convenience goods expenditure taken from Tables 3a-3e.
Study area derived turnover taken from Tables 5a-5e.
Market share is study area derived turnover expressed as a proportion of total available expenditure.
Assumed that expenditure inflow into the study area for South Woodham Ferrers is 9% (based on 2015 in-street survey).
Benchmark turnover taken from Table 8.
Commitments taken from Table 9a.
Residual expenditure is the total turnover potential minus benchmark and commitments turnover.
Sales density for new convenience goods floorspace is indicative only.

Table 11a: Comparison Goods Floorspace Capacity - Chelmsford (Constant Market Share)

	2015	2020	2025	2030	2036
Available comparison goods expenditure (£m)	£2,289.3	£2,667.3	£3,246.3	£3,962.4	£5,063.5
Turnover derived from study area (£m)	£805.3	£935.8	£1,135.9	£1,383.3	£1,763.4
Market share (%)	35.2%	35.1%	35.0%	34.9%	34.8%
Expenditure inflow (£m)	£16.1	£18.7	£22.7	£27.7	£35.3
Total turnover potential (£m)	£821.4	£954.5	£1,158.6	£1,410.9	£1,798.7
Benchmark turnover of existing stores (£m)	£821.4	£909.5	£1,012.1	£1,128.4	£1,285.8
Commitments (£m)	£156.0	£172.8	£192.3	£214.4	£244.3
Residual expenditure (£m)	**-£156.0**	**-£127.8**	**-£45.7**	**£68.1**	**£268.7**
Indicative sales density for comparison goods floorspace (£/sq m)	£7,000	£7,751	£8,625	£9,617	£10,958
Indicative comparison goods floorspace capacity (sq m net)	**-22,290**	**-16,482**	**-5,303**	**7,086**	**24,517**

Notes:

Available comparison goods expenditure taken from Tables 3a-3e.
Study area derived turnover taken from Tables 7a-7e.
Market share is study area derived turnover expressed as a proportion of total available expenditure.
Assumed that expenditure inflow into the study area for Chelmsford is 2%.
Benchmark turnover assumed to match total turnover at 2015 and then rising in line with floorspace efficiency forecasts from Experian.
Commitments taken from Table 9b.
Residual expenditure is the total turnover potential minus benchmark and commitments turnover.
Sales density for new comparison goods floorspace is indicative only.

Table 11b: Comparison Goods Floorspace Capacity - Chelmsford (Revised Market Share)

	2015	2020	2025	2030	2036
Available comparison goods expenditure (£m)	£2,289.3	£2,667.3	£3,246.3	£3,962.4	£5,063.5
Turnover derived from study area (£m)	£805.3	£989.3	£1,204.09	£1,469.69	£1,878.11
Market share (%)	35.2%	37.1%	37.1%	37.1%	37.1%
Expenditure inflow (£m)	£16.1	£19.8	£24.1	£29.4	£37.6
Total turnover potential (£m)	£821.4	£1,009.1	£1,228.2	£1,499.1	£1,915.7
Benchmark turnover of existing stores (£m)	£821.4	£909.5	£1,012.1	£1,128.4	£1,285.8
Commitments (£m)	£156.0	£172.8	£192.3	£214.4	£244.3
Residual expenditure (£m)	**-£156.0**	**-£73.2**	**£23.8**	**£156.3**	**£385.6**
Indicative sales density for comparison goods floorspace (£/sq m)	£7,000	£7,751	£8,625	£9,617	£10,958
Indicative comparison goods floorspace capacity (sq m net)	**-22,290**	**-9,442**	**2,763**	**16,254**	**35,189**

Notes:

Available comparison goods expenditure taken from Tables 3a-3e.
Study area derived turnover taken from Tables 7a-7e.
Market share is study area derived turnover expressed as a proportion of total available expenditure.
Assumed that expenditure inflow into the study area for Chelmsford is 2%.
Benchmark turnover assumed to match total turnover at 2015 and then rising in line with floorspace efficiency forecasts from Experian.
Commitments taken from Table 9b.
Residual expenditure is the total turnover potential minus benchmark and commitments turnover.
Sales density for new comparison goods floorspace is indicative only.

Table 11c: Comparison Goods Floorspace Capacity - South Woodham Ferrers

	2015	2020	2025	2030	2036
Available comparison goods expenditure (£m)	£2,289.3	£2,667.3	£3,246.3	£3,962.4	£5,063.5
Turnover derived from study area (£m)	£20.6	£23.8	£28.7	£34.9	£44.3
Market share (%)	0.9%	0.9%	0.9%	0.9%	0.9%
Expenditure inflow (£m)	£0.4	£0.5	£0.6	£0.7	£0.9
Total turnover potential (£m)	£21.0	£24.2	£29.3	£35.6	£45.2
Benchmark turnover of existing stores (£m)	£21.0	£23.2	£25.9	£28.8	£32.8
Commitments (£m)	£0.0	£0.0	£0.0	£0.0	£0.0
Residual expenditure (£m)	**£0.0**	**£1.0**	**£3.5**	**£6.8**	**£12.4**
Indicative sales density for comparison goods floorspace (£/sq m)	£7,000	£7,751	£8,625	£9,617	£10,958
Indicative comparison goods floorspace capacity (sq m net)	**0**	**131**	**400**	**702**	**1,127**

Notes:

Available comparison goods expenditure taken from Tables 3a-3e.
Study area derived turnover taken from Tables 7a-7e.
Market share is study area derived turnover expressed as a proportion of total available expenditure.
Assumed that expenditure inflow into the study area for SWF is 2%.
Benchmark turnover assumed to match total turnover at 2015 and then rising in line with floorspace efficiency forecasts from Experian.
Commitments taken from Table 9b.
Residual expenditure is the total turnover potential minus benchmark and commitments turnover.
Sales density for new comparison goods floorspace is indicative only.

Appendix II

Pedestrian Flow Counts

CHELMSFORD

July 2014

PEDESTRIAN FOOTFALL STANDARD REPORT

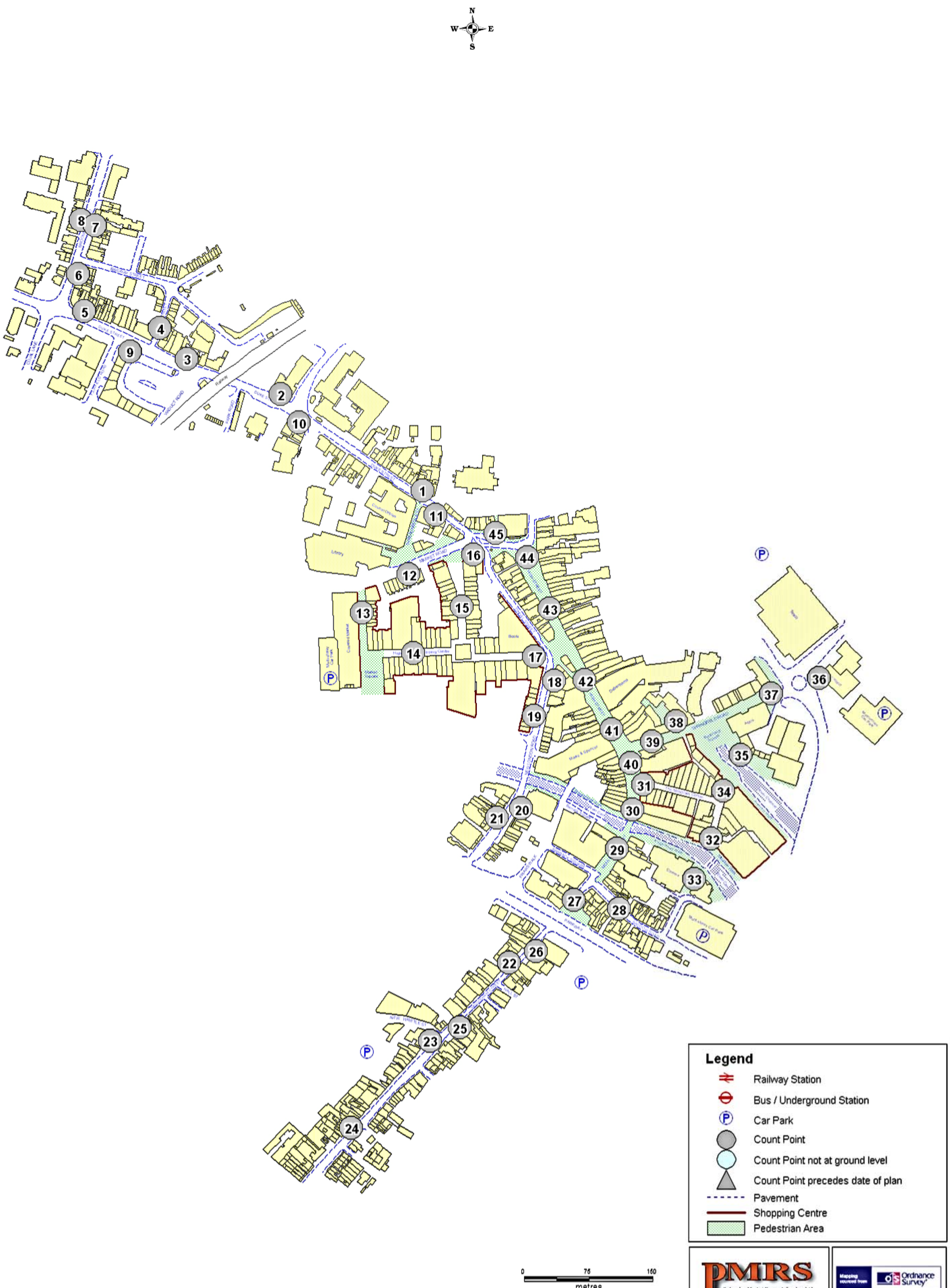
Survey Date
11th & 12th July 2014

Weather
Friday: Mainly Dry, Mild & Overcast
Saturday: Dry, Very Warm & Humid

Sopwell Mill ~ 61 Cottonmill Lane ~ St Albans ~ AL1 2ES. Tel: 01727 867100 ~ Email: pmrs@idnet.co.uk

CHELMSFORD JULY 2014			
NO	OCCUPIER	STREET & ADDRESS	PRECISE COUNT POINT LOCATION
1	VACANT	12-12A Duke Street	Pavement width counted on Duke Street
2	M & S SIMPLY FOOD	2 Duke Street	Pavement width counted on Duke Street
3	FARM PIZZA T/A	33 Duke Street	Pavement width counted on Duke Street
4	CO-OP SUPERMARKET	Wells Street	Full width of road counted on Wells Street
5	DUKES BARBER	54 Duke Street	Pavement width counted on Duke Street
6	BIRDS BRIDAL/WR	16 Broomfield Road	Pavement width counted on Broomfield Road
7	VACANT	30-32 Broomfield Road	Pavement width counted on Broomfield Road
8	NUBIAN HAIR	35 Broomfield Road	Pavement width counted on Broomfield Road
9	TESCO EXPRESS	Duke Street	Pavement width counted on Duke Street
10	VACANT	65 Duke Street	Pavement width counted on Duke Street
11	THE FLEECE P/H	84 Duke Street	Pavement width counted on Duke Street
12	VACANT	3 Market Road	Pavement width counted on Market Road
13	POLISH DELI	5-6 Cornhill	Full width of pedestrian walkway counted on Cornhill
14	NEW LOOK L/WR	29B High Chelmer Shopping Centre	Full width of pedestrian mall counted in High Chelmer Shopping Centre
15	GREGGS BAKER	20 High Chelmer Shopping Centre	Full width of pedestrian mall counted in High Chelmer Shopping Centre
16	CHARITY SHOP	Tindal Square	Pavement width counted on Tindal Square
17	BOOTS	43 High Chelmer Shopping Centre	Full width of pedestrian mall counted in High Chelmer Shopping Centre
18	REED EMP AGENCY	3 New London Road	Pavement width counted on New London Road
19	BANG & OLUFSEN HOME ENT	16-18 New London Road	Pavement width counted on New London Road
20	THE GYM HEALTH CLUB	New London Road	Pavement width counted on New London Road
21	NEW LONDON HAIRDRESSERS	74 New London Road	Pavement width counted on New London Road
22	FRANKLINS NEEDLECRAFT	201 Moulsham Street	Pavement width counted on Moulsham Street
23	BET FRED BET OFF	181-182 Moulsham Street	Pavement width counted on Moulsham Street
24	HATTER BOUTIQUE HATS	156-158 Moulsham Street	Pavement width counted on Moulsham Street
25	CASH CONCEPTS PAWNBROKER	45-46 Moulsham Street	Pavement width counted on Moulsham Street
26	STELLISONS ELEC & GAS APPS	Moulsham Street	Pavement width counted on Moulsham Street
27	DUNKIN DONUTS CAFÉ	13 Moulsham Street	Full width of pedestrian walkway counted on Moulsham Street
28	PINCHOS WINE BAR & REST	10 Baddow Road	Full width of road counted on Baddow Road
29	BAROOSH CAFE	3-4 Moulsham Street	Full width of pedestrian walkway counted on Moulsham Street
30	MONSOON L/WR	51 High Street	Full width of pedestrian walkway counted on High Street
31	FAT FACE CLOTHING	20-21 The Meadows Shopping Centre	Full width of pedestrian mall counted in The Meadows Shopping Centre
32	WILKINSON H/HLD GDS	38 The Meadows Shopping Centre	Full width of pedestrian mall counted in The Meadows Shopping Centre
33	THE BAR & CAFE	Walkway off Can Bridge Way	Full width of pedestrian walkway counted on Can Bridge Way
34	B H S	13-18 The Meadows Shopping Centre	Full width of pedestrian mall counted in The Meadows Shopping Centre
35	YATES WINE LODGE P/H	1-4 Annonay Walk	Full width of pedestrian walkway counted to river on Annonay Walk
36	ICELAND FROZEN FD	50-58 Springfield Road	Pavement width counted on Springfield Road
37	FORTY ONE BAR & REST	41 Springfield Road	Full width of pedestrian walkway counted to kerb on Springfield Road
38	ZIZZI ITALIAN REST	Grays Brewery Yard	Full width of pedestrian walkway counted on Grays Brewery Yard
39	STARBUCKS COFFEE	Springfield Road	Full width of pedestrian walkway counted on Springfield Road
40	BARCLAYS BANK	40-41 High Street	Full width of pedestrian walkway counted on High Street
41	MARKS & SPENCER	63-65 High Street	Full width of pedestrian walkway counted on High Street
42	FRASER HART JEWELLRY	24-25 High Street	Full width of pedestrian walkway counted on High Street
43	LLOYDS T S B BANK	88-89 High Street	Full width of pedestrian walkway counted on High Street
44	VACANT	2 High Street	Full width of pedestrian walkway counted on High Street
45	YOG CULTURE CAFE	Tindal Square	Pavement width counted on Tindal Square

CHELMSFORD



Survey Date: July 2014

Pedestrian Market Research Services Ltd

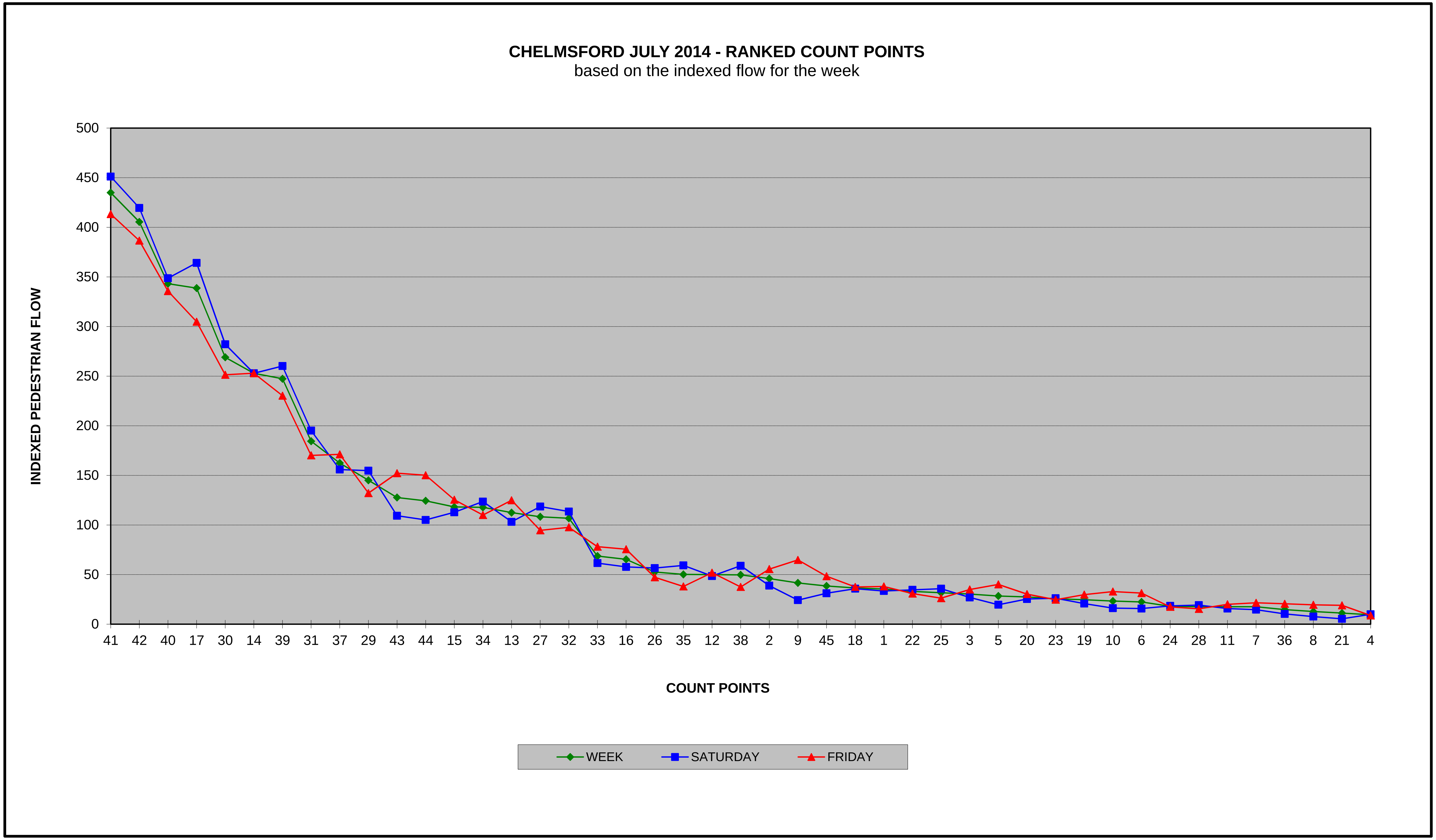
Mapping sourced from Ordnance Survey

CHELMSFORD - JULY 2014

NO	OCCUPIER	STREET & ADDRESS	NOTE	FRIDAY COUNT	FRIDAY INDEX	SATURDAY COUNT	SATURDAY INDEX	WEEK COUNT	WEEK INDEX
1	**VACANT**	12-12A Duke Street		2.22	38	2.61	33	11.36	35
2	**M & S SIMPLY FOOD**	2 Duke Street		3.24	56	3.03	39	14.75	46
3	**FARM PIZZA T/A**	33 Duke Street		2.04	35	2.10	27	9.74	30
4	**CO-OP SUPERMARKET**	Wells Street	T	0.51	9	0.78	10	3.04	9
5	**DUKES BARBER**	54 Duke Street		2.34	40	1.53	20	9.11	28
6	**BIRDS BRIDAL/WR**	16 Broomfield Road		1.83	31	1.23	16	7.20	22
7	**VACANT**	30-32 Broomfield Road		1.26	22	1.14	15	5.65	18
8	**NUBIAN HAIR**	35 Broomfield Road		1.14	20	0.60	8	4.09	13
9	**TESCO EXPRESS**	Duke Street		3.78	65	1.89	24	13.34	42
10	**VACANT**	65 Duke Street		1.92	33	1.26	16	7.48	23
11	**THE FLEECE P/H**	84 Duke Street		1.17	20	1.23	16	5.65	18
12	**VACANT**	3 Market Road		3.03	52	3.78	49	16.02	50
13	**POLISH DELI**	5-6 Cornhill	T	7.29	125	8.04	103	36.07	112
14	**NEW LOOK L/WR**	29B High Chelmer Shopping Centre	T	14.76	253	19.71	253	81.11	253
15	**GREGGS BAKER**	20 High Chelmer Shopping Centre	T	7.32	125	8.79	113	37.91	118
16	**CHARITY SHOP**	Tindal Square		4.41	76	4.50	58	20.97	65
17	**BOOTS**	43 High Chelmer Shopping Centre	T	17.79	305	28.38	364	108.64	339
18	**REED EMP AGENCY**	3 New London Road		2.19	38	2.79	36	11.72	37
19	**BANG & OLUFSEN HOME ENT**	16-18 New London Road		1.74	30	1.62	21	7.91	25
20	**THE GYM HEALTH CLUB**	New London Road		1.77	30	1.98	25	8.82	28
21	**NEW LONDON HAIRDRESSERS**	74 New London Road		1.11	19	0.42	5	3.60	11
22	**FRANKLINS NEEDLECRAFT**	201 Moulsham Street		1.80	31	2.70	35	10.59	33
23	**BET FRED BET OFF**	181-182 Moulsham Street		1.44	25	2.04	26	8.19	26
24	**HATTER BOUTIQUE HATS**	156-158 Moulsham Street		1.02	17	1.44	18	5.79	18
25	**CASH CONCEPTS PAWNBROKER**	45-46 Moulsham Street		1.53	26	2.79	36	10.16	32
26	**STELLISONS ELEC & GAS APPS**	Moulsham Street		2.76	47	4.41	57	16.87	53
27	**DUNKIN DONUTS CAFÉ**	13 Moulsham Street	T	5.52	95	9.24	119	34.73	108
28	**PINCHOS WINE BAR & REST**	10 Baddow Road	T	0.90	15	1.50	19	5.65	18
29	**BAROOSH CAFE**	3-4 Moulsham Street	T	7.71	132	12.06	155	46.52	145
30	**MONSOON L/WR**	51 High Street	T	14.67	251	21.99	282	86.26	269
31	**FAT FACE CLOTHING**	20-21 The Meadows Shopping Centre	T	9.93	170	15.21	195	59.15	184
32	**WILKINSON H/HLD GDS**	38 The Meadows Shopping Centre	T	5.70	98	8.85	114	34.24	107
33	**THE BAR & CAFE**	Walkway off Can Bridge Way	T	4.56	78	4.80	62	22.02	69
34	**B H S**	13-18 The Meadows Shopping Centre	T	6.42	110	9.63	124	37.77	118
35	**YATES WINE LODGE P/H**	1-4 Annonay Walk	T	2.22	38	4.62	59	16.09	50
36	**ICELAND FROZEN FD**	50-58 Springfield Road		1.20	21	0.81	10	4.73	15
37	**FORTY ONE BAR & REST**	41 Springfield Road	T	9.99	171	12.15	156	52.10	162
38	**ZIZZI ITALIAN REST**	Grays Brewery Yard	T	2.19	38	4.59	59	15.95	50
39	**STARBUCKS COFFEE**	Springfield Road	T	13.44	230	20.28	260	79.34	247
40	**BARCLAYS BANK**	40-41 High Street	T	19.59	336	27.18	349	110.05	343
41	**MARKS & SPENCER**	**63-65 High Street**	**T**	**24.12**	**413**	**35.16**	**451**	**139.49**	**435**
42	**FRASER HART JEWELLRY**	24-25 High Street	T	22.56	387	32.70	420	130.03	405
43	**LLOYDS T S B BANK**	88-89 High Street	T	8.88	152	8.52	109	40.94	128
44	**VACANT**	2 High Street	T	8.76	150	8.19	105	39.88	124
45	**YOG CULTURE CAFE**	Tindal Square		2.82	48	2.43	31	12.35	39
	AVERAGE			**5.84**	**100**	**7.79**	**100**	**32.07**	**100**

Note T - total street/mall width counted
Note A - enumerated on adjacent street
Note C - count affected by construction work

RED - busiest recorded footfall
COUNT - results shown in thousands
INDEX - percentage of average flow (benchmarked at 100)



The 100 index is the benchmark, and refers to the average flow for the centre.
Count points with indices greater than 100 have pedestrian flow above the centre's average.

EXPLANATORY NOTES

1 The 45 count points are selected from the Ordnance Survey plan and cover the contiguous retail area. The sites at which the enumeration was undertaken are identified by the fascia and address of the occupier with the exact enumeration point noted in each case. The names of occupiers and their trades are given for identification purposes only: the names cited are not necessarily their full trading names, nor do the trades cited necessarily represent the full extent of their business. Similarly, the streets and street numbers are given solely for the purpose of identifying the sites at which the enumeration was undertaken and they do not necessarily represent the postal addresses of the occupiers.

2 The numbers given represent estimates of the total number of pedestrians passing each site over a six hour period between the hours of 10.00am - 5.00pm on Friday and Saturday, and during the whole week (Monday-Saturday). The totals given for Friday and Saturday represent samples which are grossed up by a factor of 30, the reciprocal of the sampling fraction, to allow for the fact that on either day pedestrian movements were counted for a total of 12 minutes out of a possible 6 hours.

3 The numbers given for the whole week are the sums of those given for Friday and Saturday grossed up by a second factor of 2.353 to allow for the days Monday through Thursday which were not enumerated. This latter factor is an average based upon a series of previous counts conducted throughout the week (Monday -Saturday).

4 Unless otherwise indicated, the enumerators are instructed to count pedestrians passing the count point in both directions, with the exception of children under the age of eight, vagrants, post-persons, traffic wardens, police officers, and delivery staff. On vehicular streets, the full pavement width outside the unit indicated is enumerated, and in the case of pedestrianised streets and shopping malls, half or full width is enumerated.

5 The indices given in the table for Friday, Saturday, and the whole week are percentages based upon the average recorded flow of all 45 count points, which is benchmarked at 100 percent. The chart shows the indexed count points relative to the average pedestrian flow, and indicates the locational hierarchy throughout the centre.

Appendix III

Chelmsford Published Retail Requirements

Appendix 3

Chelmsford Published Retail Requirements

Class	Use	sqm required From	To	Retailer
All	Convenience	4047	6070	Aldi Foodstore Ltd
All	Convenience	279	929	Lituanica
All	Convenience	93	186	Eat4less
All	Convenience	46	74	Oil and Vinegar UK Ltd
A1	Comparison	279	929	Al Murad
All	Comparison	325	836	Warren Evans
A1	Comparison	279	697	Multiyork Furniture Ltd
All	Comparison	325	557	Karcher (UK) Ltd
A1	Comparison	279	557	Mattressman
A1	Comparison	232	465	American Golf
All	Comparison	177	427	Steamer Trading Ltd
A1	Comparison	93	372	Liz Earle Naturally Active Skincare
All	Comparison	111	279	Joules Clothing Ltd
A1	Comparison	65	186	Phase Eight
All	Comparison	93	186	Vets4Pets Ltd
A1	Comparison	111	186	Hawkin's Bazaar
A1	Comparison	70	186	Farrow & Ball
A1	Comparison	111	167	A1 Requirement
All	Comparison	51	102	Ecco
A1	Comparison	42	93	L'OCCITANE en Provence
A1	Comparison	74	93	JoJo Maman Bebe
All	Comparison	56	93	Rituals
All	Comparison	19	74	FONEWORLD
All	Comparison	23	74	Gadgets4UK Retail
All	Comparison	186	0	Oxygen Red Ltd
A1	Comparison	65	111	Champneys Forest Mere Ltd
All	Comparison	46	214	Cats Protection
A1	Comparison	28	74	Dr China
A2	Financial service	1	37	ChangeGroup
All	Leisure Service	1672	1850	Costa Coffee
A3	Leisure Service	279	465	Tragus
All	Leisure Service	74	186	Roosters Piri Piri
All	Leisure Service	84	139	Caffe Nero
All	Leisure Service	93	111	Dominos Pizza Group Ltd
All	Retail service	93	139	Rush Hair
All	D2	743	1858	NRG GYM
All	D2	139	325	David Lloyd Leisure Plc

Source: Co-Star Focus, July 2014