



Retail Capacity Study Update

Town Centre Composition Update: Chelmsford City Centre and South Woodham Ferrers

On behalf of Chelmsford City Council

October 2026

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1. Introduction

- 1.1 Nexus Planning (Nexus) prepared the Chelmsford Retail Capacity Study Update (the ‘2023 Study’) on behalf of Chelmsford City Council (the Council). The 2023 Study was published in July 2023 and forms part of the evidence base for the Chelmsford Local Plan Review 2022–2041, which has now been submitted for Examination.
- 1.2 Chapter 5 of the 2023 Study set out health check assessments of Chelmsford City Centre, South Woodham Ferrers Town Centre and the five Principal Neighbourhood Centres. The health check fieldwork, including the composition and vacancy surveys, was carried out in July 2022 (2023 Study, paragraph 5.5).
- 1.3 At paragraphs 6.36 and 6.37 of the 2023 Study, we recommended that the Council monitor its centres carefully given the changing circumstances affecting the retail and leisure markets, and noted that the Council may seek to put in place a further ‘light touch’ review of the health of its centres and the prevailing economic data ahead of any Examination in Public.
- 1.4 The Inspectors’ Matters, Issues and Questions (MIQs) for the Examination include the following question under Matter 7 (City, Town and Neighbourhood Centres and Community Facilities), Issue 1, in relation to Policy S12 (Role of City, Town and Neighbourhood Centres):

“7.1 Is the retail hierarchy and network of centres informed by up-to-date evidence?”

- 1.5 The Council has asked Nexus to prepare this short desk-based note to assist its response to Question 7.1. The note brings the composition and vacancy evidence for the two main centres up to date by contrasting the 2022 data presented in the 2023 Study (Figures 5.24.1 and 5.61.1) with the most recent Experian Goad survey data, benchmarked against the UK averages recorded by Experian Goad.

Scope of this Note

- 1.6 This note is intentionally focused. It draws on the latest Experian Goad Category Reports for:
- **Chelmsford City Centre** – surveyed by Experian on 10 June 2025; and
 - **South Woodham Ferrers Town Centre** – surveyed by Experian on 8 January 2026.
- 1.7 Both surveys post-date the Nexus fieldwork by approximately three years. The note does not repeat the full set of health check indicators, stakeholder engagement or household survey analysis set out in Chapter 5 of the 2023 Study, and no new site visits have been undertaken. The Principal Neighbourhood Centres are not covered by Experian Goad mapping (2023 Study, paragraphs 5.9 and 5.87) and are therefore outside the scope of this note. The retail capacity forecasts in Chapter 4 of the 2023 Study are not revisited, although we comment briefly on the latest national economic outlook in Section 3.
- 1.8 The remainder of this note is structured as follows: Section 2 explains the data and its limitations; Section 3 summarises the national market context since 2022; Sections 4 and 5 compare the 2022 and latest composition of Chelmsford City Centre and South Woodham Ferrers respectively; and Section 6 draws together our conclusions with reference to MIQ 7.1.

2. Data and Approach

2.1 Experian Goad Category Reports record the number of ground floor outlets and their footprint floorspace within a defined survey area, classified into Experian’s standard categories. These are the same categories used in Chapter 5 of the 2023 Study: Convenience, Comparison, Retail Services, Leisure Services, Financial & Business Services and Vacant. Each report includes a ‘UK Base’ average for every category, calculated by Experian across all the centres it surveys, as at the date of the report. This provides a consistent national benchmark, as used in the 2023 Study.

2.2 In comparing the two datasets, the following points should be borne in mind:

- The 2022 figures in the 2023 Study were based on Experian Goad plans that Nexus updated through its own site visits in July 2022. For Chelmsford, this included adding the railway arch units at Viaduct Road and Railway Street which were not then shown on the Goad plan (2023 Study, paragraph 5.26). The latest figures are Experian’s own survey data. Small differences may therefore reflect survey coverage or classification rather than genuine change.
- Notwithstanding the above, coverage appears to be closely comparable. Chelmsford City Centre comprised 652 outlets in 2022 and 640 in June 2025. South Woodham Ferrers comprised 100 outlets in 2022 and 97 in January 2026.
- Goad floorspace figures relate to building footprints and should be treated as a consistent basis for evaluation rather than a definitive measure of floorspace.
- Percentages in the tables are rounded to one decimal place and may not sum exactly. Changes in percentage points are calculated from the rounded figures shown.

3. Market Context since 2022

- 3.1 The 2023 Study was prepared against a backdrop of post-pandemic recovery, high inflation and the emerging ‘cost of living crisis’. Experian’s latest Retail Planner Briefing Note 23 (March 2026) indicates that conditions have since stabilised, albeit growth remains modest:
- UK retail sales volumes contracted in 2022 (–4.0%) and 2023 (–3.1%) but returned to growth in 2024 (+0.2%) and 2025 (+1.3%).
 - The share of retail sales accounted for by special forms of trading (principally online sales) fell from its pandemic peak of 30.8% in 2021 to 25.7% in 2022, and is estimated at 27.8% in 2025. Experian projects it to exceed 30% by 2029 and reach 37.1% by 2040. This is broadly consistent with the trajectory reported in Chapter 2 of the 2023 Study.
 - The UK retail store vacancy rate recorded by Experian Goad was 19.5% in 2025, a slight fall from the 2024 peak of 19.6% but well above the pre-pandemic rate of 14.2% in 2019. This measure relates to retail stores only and differs from the all-outlet UK averages in the Goad Category Reports used in Sections 4 and 5.
 - Experian notes that high streets have benefited from an increasing number of service outlets, with growth in cafés, restaurants and beauty businesses offsetting weaker demand from sectors such as clothing.
- 3.2 Experian’s forecasts were finalised before the conflict involving Iran from late February 2026, and Experian expects future forecasts to be revised downwards. This reinforces the cautious approach to long-term forecasts taken in the 2023 Study (paragraph 6.3), including our recommendation not to allocate additional retail floorspace in the short to medium term.
- 3.3 Overall, the structural trends identified in the 2023 Study – continued growth in online shopping, a shift in town centre composition from comparison retail towards leisure and services, and subdued real growth in convenience spending – have continued rather than reversed. There has been no significant break in market conditions since 2022 that would undermine the basis of the 2023 Study.

4. Chelmsford City Centre

Composition by Units

- 4.1 Figure 4.1 compares the composition of Chelmsford City Centre in July 2022 (as reported at Figure 5.24.1 of the 2023 Study) with the Experian Goad survey of June 2025, alongside the UK averages at each date.

Figure 4.1 Chelmsford City Centre – Composition by Units, 2022 and 2025

Category	Units 2022 (#)	Units 2022 (%)	UK Average 2022 (%)	Units 2025 (#)	Units 2025 (%)	UK Average 2025 (%)	Change 2022 to 2025 (% points)
Convenience	50	7.7	9.3	54	8.4	9.4	+0.7
Comparison	172	26.4	27.0	156	24.4	25.9	-2.0
Retail Services	106	16.3	15.7	119	18.6	15.9	+2.3
Leisure Services	185	28.4	25.1	198	30.9	26.7	+2.5
Financial & Business	61	9.4	8.9	50	7.8	7.8	-1.6
Vacant	78	12.0	13.8	63	9.8	14.0	-2.2
TOTAL	652	100	100	640	100	100	-

Source: 2023 Study Figure 5.24.1 (Nexus Planning and Experian Goad, July 2022); Experian Goad Category Report for Chelmsford (surveyed 10 June 2025).

- 4.2 The overall size of the centre is broadly unchanged, with 640 outlets in 2025 compared with 652 in 2022. The main changes are as follows:
- **Vacancy has fallen.** The number of vacant units has fallen from 78 to 63, and the vacancy rate from 12.0% to 9.8%. This compares with a UK average of 14.0%, giving an index of 70 (where 100 is the UK average). The gap between Chelmsford and the UK average has widened from 1.8 to 4.2 percentage points.
 - **Leisure services have continued to grow.** Leisure units have increased from 185 to 198 and now account for 30.9% of units, compared with 26.7% nationally. This continues the trend identified in the 2023 Study, where leisure units had already risen from 16.2% in 2015 to 28.4% in 2022.
 - **Retail services have increased.** Retail service units have increased from 106 to 119 (18.6% of units, against 15.9% nationally). Health & beauty is the dominant element, with 90 outlets (14.1% of all units against a UK average of 11.1%).
 - **Comparison retail has contracted modestly.** Comparison units have fallen from 172 to 156, and from 26.4% to 24.4% of units. This is in line with the national trend: the UK average has also fallen, from 27.0% to 25.9%, and Chelmsford remains close to it (index 94).
 - **Convenience provision is stable.** Convenience units have increased slightly from 50 to 54 (8.4% of units), which remains a little below the UK average of 9.4%.
 - **Financial and business services have declined.** These units have fallen from 61 to 50, and now match the UK average of 7.8%. Notably, the centre has retained 11 retail bank branches, the same number as in 2022 (2023 Study, paragraph 5.32), despite continued bank branch closures nationally.

Composition by Floorspace

Figure 4.2 Chelmsford City Centre – Composition by Floorspace, 2022 and 2025

Category	Floorspace 2022 (%)	UK Average 2022 (%)	Floorspace 2025 (sq m)	Floorspace 2025 (%)	UK Average 2025 (%)	Change 2022 to 2025 (% points)
Convenience	10.5	15.5	17,080	12.1	15.4	+1.6
Comparison	35.4	30.2	47,100	33.4	28.6	-2.0
Retail Services	7.2	7.2	11,430	8.1	7.3	+0.9
Leisure Services	25.3	26.0	40,830	29.0	27.9	+3.7
Financial & Business	7.5	6.7	9,560	6.8	6.0	-0.7
Vacant	14.0	13.8	14,910	10.6	14.3	-3.4
TOTAL	100	100	140,910	100	100	-

Source: 2023 Study Figure 5.24.1 (Nexus Planning and Experian Goad, July 2022); Experian Goad Category Report for Chelmsford (surveyed 10 June 2025).

- 4.3 The floorspace data shows a marked improvement in vacancy. Vacant floorspace has fallen from 14.0% to 10.6% of the total, against a UK average of 14.3% (index 74). In absolute terms, vacant floorspace has reduced from 19,810 sq m in 2022 to approximately 14,900 sq m in 2025, a reduction of around a quarter.
- 4.4 A material contributor is the reoccupation of the former Debenhams store. The 2023 Study (paragraph 5.34) noted that this unit had been vacant since May 2021 and was being fitted out for The Range, which subsequently opened in late 2023.¹ Department and variety stores now account for 11,580 sq m (8.2% of total floorspace), more than three times the UK average of 2.5% (index 333).
- 4.5 Comparison retail continues to occupy the largest share of floorspace (33.4%), above the UK average of 28.6%. The share has fallen slightly since 2022, reflecting the national trend. Leisure floorspace has increased from 25.3% to 29.0% and is now marginally above the UK average (27.9%). Convenience floorspace (12.1%) remains below the UK average (15.4%), reflecting the limited in-centre supermarket provision noted in the 2023 Study; main food shopping is largely met by foodstores outside the centre.

Leisure Offer

- 4.6 Figure 4.3 compares the leisure services itemised at paragraph 5.31 of the 2023 Study with the June 2025 Goad data.

¹Echo, 'The Range unveiling new "flagship" store at former Debenhams in Essex this week', November 2023.

Figure 4.3 Chelmsford City Centre – Leisure Service Outlets, 2022 and 2025

Leisure Type	Outlets 2022 (#)	Outlets 2025 (#)	Change (#)	Index vs UK Average 2025
Restaurants	41	40	-1	113
Cafés	39	42	+3	124
Fast Food & Takeaway	40	43	+3	109
Bars & Wine Bars	13	23	+10	150
Public Houses	20	16	-4	96
Sports & Leisure Facilities	12	16	+4	197
Casinos & Betting Offices	6	5	-1	81
Cinemas, Theatres & Concert Halls*	2	3	+1	143
Bingo & Amusements	3	3	0	98
Hotels & Guest Houses	2	2	0	32
Other (Clubs, Nightclubs)**	7	5	-2	–
TOTAL	185	198	+13	116

Source: 2023 Study paragraph 5.31 (July 2022); Experian Goad Category Report for Chelmsford (June 2025). * 2022 figure refers to cinemas only. ** 2022 figure derived as the balance of the leisure total not itemised at paragraph 5.31; 2025 comprises 2 clubs and 3 nightclubs.

- 4.7 The leisure offer has strengthened and broadened. The largest increases are in bars (from 13 to 23) and sports and leisure facilities (from 12 to 16), both of which are well above the UK average. Cafés and fast-food outlets have also increased. Together with nightclubs (index 287), this points to a strong evening and night-time economy, consistent with the key takeaways of the 2023 Study (paragraph 5.57). Hotels and guest houses remain under-represented (index 32), although most hotel provision is likely to sit outside the Goad survey area.

Retailer Representation

- 4.8 Experian identifies 25 national ‘major retailers’ considered most likely to improve the appeal of a centre. In June 2025, 16 of the 25 were present in Chelmsford City Centre, including John Lewis, Marks & Spencer, Boots, Next, Primark, H&M, River Island, Monsoon Accessorize, Waterstones, Superdrug, Clarks, two WHSmith outlets and two Tesco stores. The absent retailers include brands that have contracted or closed nationally, such as Wilko, which ceased trading in 2023 and previously traded in The Meadows (2023 Study, paragraph 6.13).
- 4.9 Multiple retailers (those with nine or more outlets) occupy 220 outlets, equivalent to 38.1% of occupied units and 50.3% of total floorspace. The remaining occupied units are independent businesses, so the healthy balance between national multiples and independents described in the 2023 Study has been maintained.

Summary

- 4.10 Since 2022, Chelmsford City Centre has strengthened in terms of vacancy and diversity of uses. Its vacancy rate is now well below the UK average by both units and floorspace, the former Debenhams store has been reoccupied, and the centre’s major retailer line-up remains strong. The change in composition – fewer comparison and financial service units, more leisure and retail service units – mirrors national trends and the direction of travel anticipated in the 2023 Study. There is nothing in the latest data to suggest any change to the City Centre’s position at the top of the retail hierarchy.

5. South Woodham Ferrers Town Centre

Composition by Units

- 5.1 Figure 5.1 compares the composition of South Woodham Ferrers Town Centre in July 2022 (as reported at Figure 5.61.1 of the 2023 Study) with the Experian Goad survey of January 2026.

Figure 5.1 South Woodham Ferrers Town Centre – Composition by Units, 2022 and 2026

Category	Units 2022 (#)	Units 2022 (%)	UK Average 2022 (%)	Units 2026 (#)	Units 2026 (%)	UK Average 2026 (%)	Change 2022 to 2026 (% points)
Convenience	8	8.0	9.3	6	6.2	9.5	-1.8
Comparison	15	15.0	27.0	17	17.5	25.8	+2.5
Retail Services	29	29.0	15.7	30	30.9	16.0	+1.9
Leisure Services	29	29.0	25.1	26	26.8	26.9	-2.2
Financial & Business	12	12.0	8.9	9	9.3	7.7	-2.7
Vacant	7	7.0	13.8	9	9.3	13.9	+2.3
TOTAL	100	100	100	97	100	100	-

Source: 2023 Study Figure 5.61.1 (Nexus Planning and Experian, July 2022); Experian Goad Category Report for South Woodham Ferrers (surveyed 8 January 2026).

- 5.2 The centre is broadly the same size, with 97 outlets in January 2026 compared with 100 in 2022. Its composition remains distinctive and is focused on day-to-day needs and services:

- **Vacancy remains low.** Vacant units have increased from seven to nine, and the vacancy rate from 7.0% to 9.3%. This remains well below the UK average of 13.9% (index 67).
- **Retail services dominate.** Retail service units account for 30.9% of units, almost double the UK average of 16.0% (index 193). There are 21 health & beauty outlets (21.6% of all units, against 11.3% nationally), as well as dry cleaners and launderettes, opticians, a post office, a travel agent and a filling station.
- **Comparison retail has recovered slightly.** Comparison units have increased from 15 to 17, and from 15.0% to 17.5% of units. This remains well below the UK average of 25.8%. The offer includes clothing, charity shops, chemists, greeting cards, jewellers, a florist and a fitted furniture showroom.
- **Leisure is in line with the national average.** Leisure units have fallen from 29 to 26, but at 26.8% of units the share is now almost exactly the UK average (26.9%). Fast food and takeaway outlets (nine units, index 149) remain over-represented, a matter raised by stakeholders in the 2023 Study (paragraph 5.82). Sports and leisure facilities are also well represented (three units, index 238).
- **Convenience and financial services have declined in number.** Convenience units have fallen from eight to six (6.2% of units), and financial and business service units from 12 to nine (9.3%, still above the UK average of 7.7%). Goad records no retail bank branch in January 2026. Stakeholders had highlighted the centre's remaining bank as an attraction in the 2023 Study (paragraph 5.83), so this suggests that branch has since closed.

Composition by Floorspace

Figure 5.2 South Woodham Ferrers Town Centre – Composition by Floorspace, 2022 and 2026

Category	Floorspace 2022 (%)	UK Average 2022 (%)	Floorspace 2026 (sq m)	Floorspace 2026 (%)	UK Average 2026 (%)	Change 2022 to 2026 (% points)
Convenience	35.8	15.5	6,270	35.5	15.4	-0.3
Comparison	15.0	30.2	3,150	17.8	28.5	+2.8
Retail Services	12.3	7.2	2,240	12.7	7.3	+0.4
Leisure Services	26.2	26.0	4,530	25.7	28.1	-0.5
Financial & Business	6.0	6.7	810	4.6	5.9	-1.4
Vacant	4.7	13.8	650	3.7	14.1	-1.0
TOTAL	100	100	17,650	100	100	-

Source: 2023 Study Figure 5.61.1 (Nexus Planning and Experian, July 2022); Experian Good Category Report for South Woodham Ferrers (surveyed 8 January 2026).

- 5.3 By floorspace, the composition of the centre is very stable. Convenience floorspace accounts for 35.5% of the total, compared with 35.8% in 2022 and more than double the UK average of 15.4%. This reflects the anchoring role of the Asda supermarket: supermarket floorspace alone accounts for 5,270 sq m (29.8% of the total, index 352). Comparison floorspace has increased from 15.0% to 17.8%, while leisure floorspace (25.7%) remains close to the UK average.
- 5.4 Vacant floorspace has fallen from 4.7% to 3.7% of the total, which is far below the UK average of 14.1% (index 26). The nine vacant units together comprise just 650 sq m. This indicates that the vacancies are small units, and that there is no significant cluster of vacant space in the centre.

Retailer Representation

- 5.5 None of Experian's 25 major retailers is present in South Woodham Ferrers, which was also the case in 2022. Multiple retailers occupy 13 outlets (14.8% of occupied units) but 46.4% of total floorspace, reflecting the scale of the Asda store. The centre therefore remains predominantly independent in character, as described in the 2023 Study (paragraph 5.62).

Summary

- 5.6 South Woodham Ferrers continues to perform its role as a Town Centre meeting the day-to-day convenience and service needs of its local catchment. Its vacancy rate remains well below the UK average by both units and floorspace, and its composition by floorspace is almost unchanged since 2022. The modest changes in unit numbers do not indicate any material change in the centre's health or its role in the network of centres.

6. Conclusions and Response to MIQ 7.1

- 6.1 Question 7.1 of the Inspectors' MIQs asks whether the retail hierarchy and network of centres is informed by up-to-date evidence. This note updates the composition and vacancy evidence underpinning the health checks in Chapter 5 of the 2023 Study, using Experian Goad surveys of June 2025 (Chelmsford City Centre) and January 2026 (South Woodham Ferrers).
- 6.2 Our key findings are as follows:
- **Relative roles are unchanged.** Chelmsford City Centre remains by far the largest and most diverse centre, with 640 outlets, over 140,000 sq m of floorspace and 16 of Experian's 25 major retailers. South Woodham Ferrers remains a smaller, supermarket-anchored Town Centre serving day-to-day needs. The relationship between the two centres in the hierarchy is the same as in 2022.
 - **Both centres are healthy against the UK average.** The City Centre vacancy rate has fallen from 12.0% to 9.8% of units and from 14.0% to 10.6% of floorspace. South Woodham Ferrers has a vacancy rate of 9.3% of units and just 3.7% of floorspace. All of these are below the corresponding UK averages of approximately 14%.
 - **Changes in composition follow national trends.** The modest decline in comparison and financial service units, and the growth in leisure and retail services, mirror the national changes identified by Experian and anticipated in Chapter 2 of the 2023 Study.
 - **Market conditions have stabilised.** Experian's March 2026 Briefing Note shows a return to modest retail sales growth since 2024, with the online share of spending close to the levels assumed in 2022–23. There has been no structural break in market conditions which would undermine the 2023 Study.
- 6.3 On this basis, our view is that the latest available data confirms, rather than alters, the findings of the 2023 Study in respect of the two main centres. The retail hierarchy and network of centres set out in Policy S12 remains justified, and the policy recommendations in Chapter 6 of the 2023 Study remain appropriate. These include our advice on centre boundaries and Primary Shopping Areas, the flexible approach to Class E uses within centres and the local impact threshold.
- 6.4 This evidence is also relevant to Question 7.3, which asks whether the policy will be effective in responding to changing retail and market conditions. The two main centres have adapted to market change since 2022 without any increase in overall vacancy. This supports the 2023 Study's recommendation of a flexible policy framework that supports a range of main town centre uses while protecting the vitality of the Primary Shopping Areas.
- 6.5 As noted in Section 1, the Principal Neighbourhood Centres are not covered by Experian Goad. If the Inspectors seek further assurance on these centres, the Council may wish to supplement this note with its own monitoring data on unit occupancy. We would not expect any material change in their role, given that they mainly serve day-to-day local needs around a single foodstore (2023 Study, paragraph 5.88). We would also reiterate the recommendation at paragraph 6.36 of the 2023 Study that the Council continue to monitor the health of its centres over the Plan period.