Uttlesford Draft Local Plan 2021-2041

Local Retail Impact Threshold & Local Centre Allocations

ON BEHALF OF UTTLESFORD DISTRICT COUNCIL

July 2024

Contents

Appendices

1. Introduction

1.1 This Response has been produced by Nexus Planning ('Nexus') at the request of Uttlesford District Council ('the Council'). Nexus was employed by the Council to prepare the District's "Uttlesford Retail Capacity Study Update" (2023).

1.2 The Council has subsequently relied upon the findings of the Retail Capacity Study to inform the evolution of some of its Town Centre policies. Specific to this, we are asked to assist with two further topics which were not covered in the Retail Capacity Study, namely:

- Core Policy 50 (Retail and Main Town Centre Uses Hierarchy) proposes a Local Impact Threshold of 1,000 sq m (gross) and the Council seeks further evidence in support of this; and
- Core Policy 2 (Meeting our Housing Needs) designates a number of Strategic Housing Allocations, whilst Core Policy 50 explains that those Allocations will be supported with the provision of new Local Centres. The Council seeks to understand what sort of scale and mix of Local Centre provision might be appropriate to support two of those Allocations; at Great Dunmow and at Takeley.

1.3 We address these topics individually in Sections 2 and 3 of this document.

2. Core Policy 50 - Retail Impact Threshold

The Uttlesford Draft Local Plan

2.1 Core Policy 50 of the Draft Local Plan defines a series of Town Centre Boundaries for all Town and Local Centres in the District. These boundaries were based on the work carried out by Nexus in the 2023 Retail Capacity Study. Within those boundaries, Core Policy 50 then sets out how the Council will implement its development management policies. One specification is that:

> *"Where planning permission is required for any retail or leisure proposal outside these centres, they will be subject to an impact assessment, appropriate to the use. In Uttlesford the threshold for such an impact assessment is over 1000 sqm (gross)".*

2.2 In this section, we examine the relevant legislature which governs retail impact thresholds and its application in the Uttlesford context.

Policy Context

2.3 The National Planning Policy Framework ('NPPF', 2023) explains at Paragraph 94 that:

> *"94. When assessing applications for retail and leisure development outside town centres, which are not in accordance with an up-to-date plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500m2 of gross floorspace). This should include assessment of:*
>
> *a) the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and*
>
> *b) the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme)".*

2.4 Planning Practice Guidance ('PPG') on Town Centres and Retail further elaborates on this at Paragraph 015:

> *"The impact test only applies to proposals exceeding 2,500 square metres gross of floorspace* * *unless a different locally appropriate threshold is set by the local planning authority. In setting a locally appropriate threshold it will be important to consider the:*
>
> - *scale of proposals relative to town centres*
> - *the existing viability and vitality of town centres*
> - *cumulative effects of recent developments*
> - *whether local town centres are vulnerable*
> - *likely effects of development on any town centre strategy*
> - *impact on any other planned investment"*

2.5 It is therefore evident that any Local Impact Threshold which deviates from the nationally set default threshold of 2,500 sq m will have necessitated a consideration of the six bullet points under Paragraph 015 of the PPG.

The Uttlesford Retail Capacity Study Update (2023)

2.6 The Retail Capacity Study Update prepared by Nexus in 2023 was supported by a significant weight of empirical data and research. A key pillar of the assessment was a household telephone survey of 607 households in Uttlesford District and its immediate surrounds, prepared by NEMS Market Research. That survey sought to understand quantitative retail and leisure shopping patterns, as well as a range of qualitative views on the various Town Centres within the District, as well as a range of other matters. The survey findings were included in full at Appendix B to the Retail Capacity Study, with detailed assessment and analysis by Nexus at Section 4 ('Capacity Assessment') and at Appendix C (Statistical Tables).

2.7 The survey was also backed up by a detailed Health-check assessment of all the Town and Local Centres in the District, prepared by Nexus, and carried out in accordance with the suggested range of indicators set out at Paragraph 006 of the Town Centres and Retail PPG. This was contained at Section 5 ('Health-Check Assessment') of the Retail Capacity Study.

2.8 Building on these two aspects, Nexus provided a series of recommendations at Section 7 of the Retail Capacity Assessment ('Summary and Recommendations). Pertinent to Retail impact Threshold, this included a recommendation at 7.14 that:

> *"Given the smaller size of Uttlesford's town centres, and the large quantum of independent retailers, we consider it likely that the Council may wish to consider implementing an impact threshold at below the NPPF standard of 2,500 sq m. In doing so, the Council would need an appropriate evidence base. The findings of this Study should be used in this regard and the Council may wish to consider a specific exercise in re-examining a suitable threshold. To this end, we note that emerging Core Policy 50 under the Regulation 18 Plan had a suggested threshold of 1,000 sq m. This looks sensible in our estimation, though this threshold should be re-tested for its soundness under a re-consideration of the Plan policies. Such an assessment would incorporate the market share and health-check findings of this Study, alongside any other economic or market considerations at that point in time and consider whether the 1,000 sq m threshold remained appropriate".*

2.9 The rationale for the recommendation in 2023 was therefore built on an assessment of the scale and nature of retail provision in Uttlesford District. However, no detailed consideration was given to the PPG factors highlighted above as that was outside the scope of the initial reporting. Accordingly, the Council has asked Nexus to objectively consider this matter in detail.

2.10 In doing so, we refer to the health-checks and household telephone surveys which were prepared in support of the Retail Capacity Study 2023, which remain relevant at the present date.

2.11 Within this context, we therefore address all six of the bullet points under Paragraph 15 of the Town Centres and Retail PPG. Our method and interpretation of the PPG test was recently examined at the Crawley Borough Local Plan Examination (January 2024) and found to be sound by the Plan Inspectors (February 2024). We therefore adopt the same methodology here.

i. Scale of Proposals Relative to Town Centres

2.12 The 2023 Retail Capacity Study incorporated a series of composition charts for each of Saffron Walden, Great Dunmow and Stansted Mountfitchet Town Centres in Section 5. We have floorspace data provided by Experian Goad for Saffron Walden, whilst Valuation Office data has been utilised for Great Dunmow and Stansted Mountfitchet.

2.13 Applying that composition analysis to the PPG test, we are able to contrast below the relative scale of units in each case.

Figure 2.1 – Unit Sizes, Town Centres

	Saffron Walden	Great Dunmow	Stansted Mountfitchet
Average Unit Size	122 sq m	125 sq m	147 sq m
Average Convenience Goods Unit Size	235 sq m	301 sq m	382 sq m
Average Comparison Goods Unit Size	126 sq m	113 sq m	142 sq m
Average Service Goods Units Size	112 sq m	102 sq m	96 sq m
Average Vacant unit Size	111 sq m	105 sq m	120 sq m

2.14 The analysis of Uttlesford's Town Centres points to a prevalence of smaller retail unit sizes, with averages unit sizes ranging between 122 – 147 sq m across the three centres. Convenience goods units are larger, averaging between 235 – 382 sq m across the three centres. Comparison goods and service goods units are considerably smaller at typically just over 100 sq m.

2.15 Linked to this, it is common elsewhere to draw on committed development proposals to understand the type of scale of units which are being sought in edge or out-of-town locations and whether there was likely to be an overlap in provision. In this instance the Council has reported that there are no such extant permissions.

2.16 There is though a current application for a new foodstore (to be operated by Lidl) in Great Dunmow[1]. That store is proposed at 1,512 sq m net floorspace, incorporating 1,210 sq m of convenience goods sales and 302 sq m net comparison goods sales.

2.17 There is therefore no evidence of demand to draw on from committed development, and only little by way of proposed development. Notwithstanding, it is reasonable to suggest that the average size of units in Uttlesford's town centres are likely to be smaller than the average size of units sought outside town centres. This does not mean though that the centres are immune from threat. There do exist a number of larger vacant units which are capable of competing for occupation with out-of-town proposals. Examples of this include the current vacant units around Market Place in Saffron Walden.

2.18 To try to assist further, we have reviewed www.therequirementlist.com which Nexus subscribes to. Whilst this list can only be indicative, and does not indicate concrete demand, it is helpful in understanding the range of operators who might wish to open new premises in the Uttlesford area in the near future. As can be seen, all but one of the retailers (The Range) is seeking floorspace which would otherwise not qualify for retail impact assessment at the national threshold if it were to be brought forward outside a Town Centre. This lends further weight to the scale of local impact

[1] LPA ref UTT/23/2006/FUL

threshold recommended (i.e. 1,000 sq m), whereby the majority of larger unit sizes detailed on the list would require impact assessment under the local threshold.

Operator	Location	Size of Unit
Lidl	Great Dunmow, Saffron Walden	1,500 – 2,300 sq m
Toolstation	Great Dunmow	300 – 550 sq m
Costa Coffee	Great Dunmow	100 sq m
The Range	Saffron Walden	2,500 – 6,500 sq m
Majestic Wine	Saffron Walden	1,800 – 4,200 sq m
Whistles	Saffron Walden	120 – 180 sq m
Hobbs	Saffron Walden	200 – 280 sq m
Wendy's	Saffron Walden	100 - 400 sq m
JoJo Mamam Bebe	Saffron Walden	70 – 130 sq m
M&S Food	Saffron Walden	1,200 – 2,300 sq m
Tortilla	Stansted Mountfitchet	80 – 220 sq m

ii. The Existing Vitality and Viability of Town Centres

2.19 A full health-check for each Town Centre was carried out at Section 5 of the Retail Capacity Study 2023. We have extrapolated those findings into **Appendix A** of this report, and draw further on those findings below where we consider the 'vulnerability' of the Centres.

iii. Cumulative Effects of Recent Developments

2.20 The Council has confirmed that there are no recent developments which might cumulatively impact on the relevant Town Centres.

iv. Whether Local Town Centres are Vulnerable

2.21 The composition data at Figures 24, 26 and 29 of the Retail Capacity Study 2023, points towards relative pictures of health in each of the three main centres. All three centres have vacancy rates below the UK average. However, when contrast to previous surveys in 2010, it is evident that vacancies have increased significantly in Saffron Walden (6.7% to 11.4%) and slightly in Stansted Mountfitchet (4.7% to 5.9%). The vacancy rate in Great Dunmow has remained relatively static (4.2% to 4.1%).

2.22 Moreover, Uttlesford District is one of the few Districts of the UK which does not have any significant out-of-centre or out-of-town retail competition. There are no major retail parks and only a handful of medium-sized supermarkets. Each of the three largest centres has a foodstore at its core (Waitrose in Saffron Walden, Co-op in Great Dunmow and Co-op in Stansted Mountfitchet), which they rely on heavily for footfall generation.

2.23 As a result, Uttlesford's town centres are particularly susceptible to retail impact, even from relatively modest developments. The proof of this is in the recent submissions made on behalf of Lidl for a new foodstore in Great Dunmow. Whilst we make no comment here on the acceptability of that proposal, it is a fact that even the applicant has modelled that there would be an 8.8%[2] reduction on trade on convenience goods facilities in Great Dunmow Town Centre. It is clear, therefore, that even the most optimistic of assessments would result in meaningful impact on a town centre. Notably, at 2,169 sq m gross floorspace, the Lidl proposal would not necessarily have to be assessed for impact under the nationally set threshold (2,500 sq m gross).

2.24 Accordingly, we consider that the rural setting of Uttlesford, coupled with its heavy reliance on existing anchor retailers within its town centres, provides proper context for its town centres to be considered 'vulnerable' to out-of-centre trade.

v. Likely Effects of Development on any Town Centre Strategy

2.25 The Council does not currently have in place any Town Centre Strategies for its individual Town Centres. Notwithstanding it does propose to bring forward place-specific strategies in due course, once the Local Plan is adopted.

vi. Impact on any Other Planned Investment

2.26 The Council has confirmed that it is not aware of any additional planned Investment which would factor into thinking around the local impact threshold.

Conclusion

2.27 The PPG sets out a range of criteria which are relevant to considering whether a Local Impact Threshold should be imposed. This report has considered each in turn.

2.28 Our assessment is that as a result of the likely vulnerability of the town centres, it is appropriate for Uttlesford District Council to seek a Local Impact Threshold to protect its centres. The designation of a Local Impact threshold need not be considered as a barrier to investment, but instead an appropriate safeguard to ensure that retail impact is assessed across a range of proposals.

2.29 Our recommendation is that a 1,000 sq m gross impact threshold be applied, in line with the wording of Core Policy 50 of the Draft Local Plan. A threshold at this limit would capture discount foodstore proposals, such as the example we have described in Great Dunmow, whilst not unnecessarily incumbering smaller proposals beneath the threshold.

[2] Rapleys, Planning and Retail Statement, Table 10.9 (LPA ref: UTT/23/2006/FUL)

3. Core Policy 50 – Local Centres in Support of Strategic Allocations

Introduction

3.1 The Council also wishes to understand the appropriate quantum and mix of uses which might be appropriate as part of the Local Centre Designations for two of their proposed strategic allocations at Takeley and Great Dunmow.

3.2 Local centres in strategic allocations should principally cater for the large proportion of residents' 'top-up' food shopping and service provision, especially retail and leisure services such as cafes, hairdressers and beauty salons. It is expected that residents in most cases would still travel further afield to larger retail centres for the majority of their comparison goods shopping. Whether a strategic allocation would cater for main food shopping or not will be dependent on the scale of the local centre and the availability of other food stores in the vicinity. We anticipate that similar principles will apply to the proposed strategic allocations.

3.3 In keeping with the wider capacity assessment for the District as a whole, we have focused on the delivery of the strategic allocations to the end of the Plan period at 2041. Although the two strategic allocations are at early stages of the planning process, based on our knowledge of various strategic allocation proposals, it is assumed that both will have been completed by that point.

Population

3.4 To calculate the likely future population and expenditure of the strategic allocations, we first consider average household sizes in Uttlesford District. Whilst housing mix will differ marginally between different strategic allocations, it is assumed for the purpose of our assessment that on average they will follow the Uttlesford averages.

3.5 We derive average household sizes from Census 2021 data regarding the number of households and the number of people living in those households. The table below outlines the average household size for each dwelling size. We assume that these will persist to 2041.

Table 3.1 Average household size

Dwelling Size	Population	Household number	Average Persons per Household
1-bedroom	3,122	2,289	1.36
2-bedroom	12,467	6,601	1.89
3-bedroom	28,577	11,375	2.51
4+-bedroom	33,988	11,051	3.08

Source: Census 2021

3.6 By applying the relevant average household sizes to the number of proposed dwellings to be accommodated at each strategic allocations, we are able to estimate the likely population at each settlement. The dwelling mix at both allocations is currently unknown and therefore we have assumed that dwelling sizes will follow the housing mix ratio assumptions in Table 3.2, which have been provided by the Council and are based on an amalgamation of market and affordable mixes as set out in the Uttlesford District Council Local Housing Needs Assessment.

Table 3.2 Dwelling mix assumptions

1-bed	2-bed	3-bed	4+-bed
16.3%	20.2%	39.7%	23.8%

Source: Uttlesford District Council

3.7 Great Dunmow is allocated for 885 dwellings, whereas Takeley is allocated for 1,506 dwellings.

3.8 By multiplying the number of dwellings at each strategic allocation by the average household sizes for different dwelling sizes, we therefore calculate that the strategic allocations will have a combined population of 5,579 people, as seen in Table 3.3 below.

Table 3.3 Population at each strategic allocation

Strategic Allocation	Proposed Dwellings @ 2041	Proposed Population @ 2041
Great Dunmow	885	2,065
Takeley	1,506	3,514
Total	**2,391**	**5,579**

Source: Uttlesford District Council

Convenience Goods Floorspace Capacity

3.9 From the projected populations at the strategic allocations, we can then calculate the expected convenience expenditure at each settlement.

3.10 We have sourced per capita convenience goods expenditure at the most recent reporting year of 2022 from Experian AppLibrary. For each strategic allocation we have sourced this data for the Middle Layer Super Output Areas (MSOAs) in which they are located. For Great Dunmow, this figure is £2,744 and for Takeley this figure is slightly lower at £2,606.

3.11 This base year data is then projected forwards to the two reporting years (2023 and 2041) using the per capita growth forecasts as set out in Figure 7 of the Experian Retail Planner Briefing Note 2021 (February 2024). These forecasts are appropriately adjusted for special forms of trading. The rates adopted can be seen in Table 3 of **Appendix B**.

3.12 To calculate the total expenditure generated by residents at each strategic allocation, we multiply the average per capita convenience goods expenditure by the number of persons expected to populate each strategic allocation. This provides an estimate of the overall convenience expenditure at each strategic allocation.

3.13 However, Local Centres would not be expected to fulfil the role of a main food shopping destination; in the main we would consider it appropriate for main food shopping needs arising from strategic allocations to be directed towards existing centres and food superstores. In recognition of this, we have disaggregated the identified expenditure in terms of the assumed 'main food' and 'top-up' shopping expenditure in accordance with our general observation from survey evidence. We therefore assume that 75% of spending will be apportioned to 'main food' spending and the remaining 25% will be apportioned to 'top-up' spending.

Table 3.4 Estimated Available Convenience Expenditure at each strategic allocation @ 2041

Strategic Allocation	Total Population	Per Capita Convenience Expenditure @ 2023	Per Capita Convenience Expenditure @ 2041	Estimated Available Convenience Goods Expenditure @ 2041 (£m)	Estimated Available 'Main Food' Goods Expenditure @ 2041 (£m)	Estimated Available 'Top-up' Goods Expenditure @ 2041 (£m)
Great Dunmow	2,065	2,666	2,612	5.4	4.0	1.3
Takeley	3,514	2,532	2,482	8.7	6.5	2.2
Total	**5,579**			**14.1**	**10.6**	**3.5**

Notes:
Populations from Table 3.3.
Per Capita Convenience @ 2023 from Experian App Library 2022 report, Great Dunmow data from E02004597 and Takeley data from E02004596
Per Capita Convenience @ 2041 is the 2023 figures projected forwards by the annual growth forecasts in Table 3 of Appendix C
The split between main food and top-up is based on a 75%/25% split in line with Nexus experience and professional judgment

3.14 The table above shows that £1.3m convenience top-up spending is likely to be generated by residents at Great Dunmow, and another £2.2m at Takeley, for a total of £3.5m.

3.15 Not all of this spend is expected to be carried out locally. Professional judgments need to be made in respect of the proportion of available 'top-up' expenditure which could reasonably be expected to be directed to local facilities within the strategic allocation as part of individuals' spend, as well as any expenditure which might be attracted from adjacent areas and from passing custom.

3.16 From our knowledge of how households shop and their natural inclination to use facilities close to home to undertake much of their 'top-up' shopping, we consider that appropriately located convenience facilities accessible to both of the planned strategic allocations will generally have the potential to attract around 75% of all such expenditure.

3.17 We therefore consider that the majority of the turnover of these 'top-up' convenience stores will originate within the strategic allocations. However, individuals residing outside the strategic allocations will clearly visit these developments for various reasons (visiting friends, school, work etc.), and we have therefore assumed that an added 20% of the turnover of all 'top-up' stores within the strategic allocations will be 'inflow' from outside the strategic allocation itself.

3.18 Based on these assumptions, we set out in the table below our estimation for the available 'top-up' expenditure which might support the strategic allocations in the period to 2041.

Table 3.5 Estimated Total 'Top-Up' Convenience Goods Expenditure at each strategic allocation @ 2041

Strategic Allocation	Estimated Available 'Top-up' Goods Expenditure @ 2041 (£m)	Estimated Retention of Expenditure @ 75% (£m)	Estimated Inflow of Trade @ 20% (£m)	Total 'Top-up' Goods Expenditure Available (£m)
Great Dunmow	1.3	1.0	0.2	1.2
Takeley	2.2	1.6	0.3	2.0
Total	**3.5**	**2.6**	**0.5**	**3.2**

Notes:
Estimated available 'Top-up' Expenditure taken from Table 3.4
Assumed retention of 75% of available strategic allocation residents spend + inflow of 20% of trade from beyond the strategic allocation
Average sales density based on Nexus Planning professional judgment

3.19 The final step in our methodology is to convert the identified 'top-up' expenditure into a floorspace estimate. In undertaking this exercise, we deploy an average sales density which is more accented towards the known sales density of traders likely to occupy smaller convenience stores (e.g. Budgens Co-op, Londis etc), potentially discount foodstores (Lidl or Aldi), or one of the 'main four' foodstore operators who might open a smaller format store. Using this approach, we adopt a sales density average of £9,500/sqm at 2041. The results are set out in Table 3.6 below.

Table 3.6 Estimated Floorspace Capacity for 'Top-Up' Convenience Goods @2041

Strategic Allocation	Total 'Top-up' Goods Expenditure Available (£m)	Estimated Average Sales Density for Convenience Retailers (£/sqm)	Estimated 'Top-up' Convenience Floorspace Capacity by 2041 (sqm)
Great Dunmow	1.2	9,500	128
Takeley	2.0	9,500	207
Total	**3.2**		**334**

Notes:
Estimated available 'Top-up' Expenditure taken from Table 3.5
Average sales density based on Nexus Planning professional judgment

3.20 The results show that there will be an estimated £3.2m 'top-up' spend available at the two strategic allocations by 2041. Converting this to floorspace capacity, we expect the strategic allocations to support an additional 334 sqm of additional convenience shopping floorspace. Given the scale of floorspace required, we expect this to take the form of smaller foodstores.

Comparison Goods Floorspace Capacity

3.21 We carry out a similar assessment of strategic allocation capacity to support comparison goods in our tables below. The key methodology points and assumptions are set out below:

- Comparison expenditure per capita is taken from Experian AppLibrary at 2022, for the same MSOAs used for the convenience expenditure data;
- Comparison expenditure is then grown using the growth rates outlined at Table 3 of Appendix C;
- We assume that a much lower percentage of comparison goods spend generated by strategic allocation residents (5%) will be spent within Local Centres. The vast majority of such spending would be expected to be carried out in higher order town centres. A similar assumption is made that an additional 10% of inflow would be generated from individuals visiting the strategic allocation from outside; and
- We adopt an average sales density of £5,000/sqm at 2041, in line with our observed averages for comparison goods retailers in smaller Local Centres.

Table 3.7 Estimated Available Comparison Expenditure at each strategic allocation @ 2041

Strategic Allocation	Total Population	Per Capita Comparison Expenditure @ 2023	Per Capita Comparison Expenditure @ 2041	Estimated Available Comparison Goods Expenditure @ 2041 (£m)
Great Dunmow	2,065	4,127	6,042	12.5
Takeley	3,514	3,986	5,836	20.5
Total	**5,579**			**33.0**

Notes:
Populations from Table 3.3
Per Capita Comparison @ 2023 from Experian App Library 2022 report, Great Dunmow data from E02004597 and Takeley data from E02004596

Per Capita Comparison @ 2041 is the 2023 figures projected forwards by the annual growth forecasts in Table 3

Table 3.8 Estimated Total Comparison Expenditure at each strategic allotment @ 2041

Strategic Allocation	Estimated Available Comparison Goods Expenditure @ 2041 (£m)	Estimated Retention of Expenditure @ 5% (£m)	Estimated Inflow of Trade @ 10% (£m)	Total Comparison Goods Expenditure Available (£m)
Great Dunmow	12.5	0.6	0.1	0.7
Takeley	20.5	1.0	0.1	1.1
Total	**33.0**	**1.6**	**0.2**	**1.8**

Notes:

Estimated available comparison goods Expenditure taken from Table 3.7

Assumed retention of 5% of available strategic allocation residents spend + inflow of 10% of trade beyond the strategic allocation

Table 3.9 Estimated Floorspace Capacity for Comparison Goods @ 2041

Strategic Allocation	Total Comparison Goods Expenditure Available (£m)	Estimated Average Sales Density for Comparison Retailers (£/sqm)	Estimated Comparison Floorspace Capacity by 2041 (sqm)
Great Dunmow	0.7	5,000	137
Takeley	1.1	5,000	226
Total	**1.8**		**363**

Notes:
Estimated total comparison goods Expenditure taken from Table 3.8
Average sales density based on Nexus Planning professional judgment

3.22 Our analysis shows that by 2041, the strategic allocations will collectively support approximately 363 sqm of new comparison goods floorspace.

Services Floorspace Capacity

3.23 In addition to the 'top-up' and comparison goods floorspace, it would also be normal to bring forward a number of units in service retail use. These are typically classified as being in retail services (e.g. hairdressers, nail bars, dry cleaners etc), leisure services (cafes and restaurants) and financial and business services (e.g. estate agents, banks etc). These services are less easy to estimate expenditure capacity for, though Experian Goad estimate that such uses collectively account for 40% of units and 26% of floorspace in UK centres. We have factored in that the proposed Local Centres supporting the strategic allocations are likely to be smaller than the UK average surveyed by Goad and might be expected to have a slightly higher proportion of service goods. We have therefore assumed that 40% of all floorspace in the centres will be used for services.

Summary

3.24 In light of the above, we have identified theoretical capacity to support the levels of floorspace in each strategic allocations in Table 3.10.

Table 3.10 Indicative Floorspace Capacity at each strategic allocation @ 2041

Strategic Allocation	Estimated Convenience Goods Floorspace Capacity (sqm)	Estimated Comparison Goods Floorspace Capacity (sqm)	Estimated Service Goods Floorspace Capacity (sqm)	Total Floorspace (sqm)
Great Dunmow	128	137	177	442
Takeley	207	226	288	720
Total	**334**	**363**	**465**	**1,162**

Notes:

Service goods floorspace capacity assumes this will account for 40% of total floorspace

3.25 We calculate that the strategic allocations will collectively support an additional 1,162 sqm of retail floorspace by 2041.

3.26 At these approximate levels of provision, we consider that there is unlikely to be any harm to existing centres. However, our figures are acknowledged as indicative and would need testing for their appropriateness through the ordinary planning process in each instance.

Appendix A – Health-Check Assessments (Extrapolated from Uttlesford Retail Capacity Study Update, 2023)

5. Health-Check Assessment

5.1 This section of the report sets out our detailed health check findings on the vitality and viability of Uttlesford's Key Settlements (Town Centres), as defined in the Council's proposed draft Regulation 18 Plan (Core Policy 3 and 50), of Saffron Walden, Great Dunmow and Stansted Mountfitchet, as well as its Local Rural Centres of Elsenham, Great Chesterford, Hatfield Heath, Newport, Takeley and Thaxted.

5.2 The extent of our assessments of the centres have been determined by the extent of Experian Goad Plans (where available), in order to provide consistency and allow for comparison against national averages and the findings of the previous 2016 and 2021 Studies. Where Goad Plans are not available, the Council's base mapping has been used. Full sized composition plans are contained at **Appendix D**.

Methodology

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

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

5.5 Nexus carried out the latest health check surveys in July 2023.

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

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

- **Diversity of Uses** | Data on the diversity of uses in Uttlesford's centres was collated during the health check completed by Nexus in July 2023. The collected data includes the number, type and quantum of floorspace provided in these locations.
- **Proportion of Vacant Street Level Property** | Vacant properties were also identified during the 2023 health check. The volume of vacant floorspace within a centre can provide an indication of how well the centre is performing. However, it is important to acknowledge that a degree of vacancy is inevitable and indeed desirable. Some churn is expected in the market as units alter and change, as new businesses come in, and others leave. In this context, vacant units can be found in even the strongest of town centres. Equally, a low vacancy rate does not necessarily mean a centre is performing well; as the quality and performance of the occupied units may be relatively poor.
- **Commercial Yields on Non-Domestic Property** | Whilst this can be an indicator of town centre performance over time, data on commercial yields for Uttlesford's centres is not publicly available at this time, as it is now only

produced by ONS for major cities. Commercial rents provide a suitable alternative indication of the relative attractiveness of the area.

- **Customers' Views and Behaviour** | Information on customers' views is based on the results of the household survey data. Importantly, and as described at Chapter 4, the household survey undertaken by NEMS represents a demographically accurate sample of the population.
- **Retailer Representation and Intentions to Change Representation** | Information on the current strength of centres and retailer representation have been derived from Experian Goad Category Reports and other published sources.
- **Commercial Rents** | An examination of average prime rents to facilitate an understanding of shopping rents and investment yields.
- **Pedestrian Flows** | General footfall and pedestrian flows were observed by Nexus during site visits to the Centres. Nexus was able to obtain a comprehensive understanding of pedestrian flows through observation at varying times.
- **Accessibility** | Consideration of access to and around each centre was informed by the Nexus site visits. This was in addition to stakeholder engagement, and a desktop review of data pertaining to access to public transport and parking facilities. The accessibility of a centre is determined by the ease and convenience of access by a variety of transport means including pedestrians, cyclists and disabled people.
- **Perceptions of Safety and Occurrence of Crime** | General perceptions of safety were gathered by Nexus during the site visits and supplemented by a review of existing data.
- **State of Town Centre Environmental Quality** | Consideration of the quality of the buildings and public realm in each of the centres was informed by Nexus' site visits to the centres.
- **Balance between independent and multiple stores** | Consideration of the balance of retailer representation was informed by Nexus' site visits to the centres, as well as Goad mapping.
- **Barriers to Entry** | Consideration of the extent to which there is evidence of barriers to new businesses opening and existing businesses expanding. Attention was given to the length of unit vacancies as per Goad Reports, as well as the size of units available to let, and insights provided through engagement with relevant stakeholders operating businesses within the centres.
- **Opening Hours / Availability / Evening Economy** | General understanding of the night-time economy was informed by Nexus' site visits to the centres, stakeholder engagement, and a desktop review of various local businesses' opening hours.

Saffron Walden Town Centre

Description

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

5.9 Due to the historic nature of this centre, the layout is informal and interesting, with several narrow side streets which add to its character. The main shopping streets are located on High Street, King Street, Hill Street and around Market Place, which acts as a focal point of the centre. The centre is entirely within a Conservation Area. Saffron Walden is classed as a 'Town Centre' within the Uttlesford Local Plan (2005) and the Regulation 18 Plan (2023).

Overall Composition

5.10 Saffron Walden is the largest centre in the District comprising 210 units in town centre uses. The centre has a good mix of uses largely comprising independent retailers with a number of national multiples including Boots, Superdrug, Monsoon and Robert Dyas, primarily located in King Street and Hill Street. Waitrose is the largest convenience store located to the south of the centre. Our Goad assessment of the centre is contained at Figure 23 below, and also in larger print form at Appendix D.

Figure 23. Saffron Walden Composition Map

5.11 Figure 24 provides an overview of Saffron Walden's composition at the time of the site visits in July 2023, compared to the UK averages (2023). It also contrasts the findings to the last health checks carried out for the Council in 2010 and 2021.

Figure 24. Saffron Walden Town Centre Composition

Categories	Units 2010 (%)	Units 2021 (#)	Units 2021 (%)	Units 2023 (#)	Units 2023 (%)	UK Average Units 2023 (%)
Convenience	7.2	16	7.2	14	6.7	9.3
Comparison	54.1	77	34.8	80	38.1	26.9
Retail Services		*32*	*14.9*	*34*	*16.2*	*15.8*
Leisure Services		*37*	*16.7*	*38*	*18.1*	*25.3*
Financial & Business Services		*27*	*12.2*	*20*	*9.5*	*8.7*
Services	32.0	96	43.4	92	43.8	49.8
Vacant	6.7	32	14.5	24	11.4	13.8
Total	**100.0**	**221**	**100.0**	**210**	**100.0**	**100.0**

Source: Nexus Planning 2021 and 2023
Note: Data analysed for 2021 and 2023 uses the current Goad category definitions to allow comparison with UK averages
Note: Data analysed for 2010 using superseded Goad category definitions to allow comparison with historic data.

Convenience

5.12 The proportion of convenience goods units (6.7%) has remained relatively consistent since 2010, but is marginally below the UK average of 9.3%.

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

Comparison

5.14 Comparison units account for the largest proportion of stores within Saffron Walden Town Centre, with 80 units (38.1%), which considerably exceeds the UK average of 26.9%. This suggests that the centre is still performing well in terms of comparison goods offer, and this is borne out by the survey results highlighted in Section 4. Notwithstanding, in keeping with many town centres across the UK, Saffron Walden has seen a significant decrease in the number of comparison goods retailers since 2010, when they accounted for 54.1% of units in the centre.

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

Services

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

5.17 Retail services account for 16.2% of the units in Saffron Walden, which is very similar to the UK average of 15.8%. Of the retail services provided in Saffron Walden Town Centre, it is notable that nearly two-thirds provide 'health and beauty' services.

5.18 The centre features a lower proportion of leisure units (18.1%) compared to the UK average of 25.3%. The leisure services currently present in the centre include a range of cafes, along with several public houses, two hotels, restaurants and takeaway units. Notably, Saffron Walden does not currently offer any increasingly popular 'experience-based' leisure activities such as indoor golf or escape rooms.

5.19 Financial and business services account for 9.5% of the centre's units. This is marginally higher than the UK average of 8.7%. The centre's offer includes a wide range of banking options, as well as a number of estate agents.

Vacancies

5.20 At the time of the site visits in July 2023, there were 24 vacant units (11.4%), a lower proportion than the UK average (13.8%). This is an improved situation to 2021 when 14.5% of units were vacant and suggests that Saffron Walden Town Centre has emerged well out of the pandemic. This is corroborated by our market share analysis in Section 4.

Pedestrian Flows

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

Accessibility

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

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

5.223 Fairycroft Road, The Common and Swan Meadow are charged at £2.00 for 3 hours. Rose and Crown is £1.20 for a maximum of 2 hours. Further parking was also witnessed on Market Place at the time of the Nexus site visit. Car parks appeared to be well utilised.

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

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

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

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

5.228 The results of the household survey found that 76.4% of respondents travelled to the town centre using private vehicles, whilst 20.1% had walked to the centre. 2.6% of respondents used the bus.

Perception of Safety

5.29 The centre was relatively busy at the time of the site visits, providing significant natural surveillance across the centre. The perception of crime in Saffron Walden is low. This is corroborated by data from crimerate.co.uk which notes that the incidence of crime in Saffron Walden was 35% lower than the UK average in 2023.

Opening Hours

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

Environmental Quality

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

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

5.33 The street furniture was largely uncluttered and the pavements in relatively good condition, albeit very narrow in places as would be expected in a centre of its historic nature.

Barriers to Entry

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

5.35 There are a number of vacant units in the Town Centre (24 no.). These are not concentrated in any particular area, which is a positive. However, it is notable that a number of vacant units were previously occupied by national multiple retailers. This could be considered a barrier to entry to other national multiples who may be concerned with the viability of the centre.

Customer Views & Behaviour

5.36 When asked what they most liked about Saffron Walden Town Centre, the most common responses from the NEMS household survey (Q29) were 'choice and range of shops' (30.4%), the 'environmental quality of the centre' (17.0%) and 'the market' (7.3%).

5.37 The top three responses as to what would encourage respondents to visit the centre more often (Q30) were, 'increased choice and range of shops' (14.4%), 'more parking' (6.9%) and 'improved non-food shops' (6.5%).

Summary

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

- The provision of convenience goods units is slightly below the UK average, whilst the provision of comparison goods units is well above the UK average.

- The centre is increasingly accented towards independent retail.
- There has been a notable increase in service provision in the town centre. Services account for 43.8% of units within the centre, compared to 32.0% in 2010. Financial services and health and beauty services are especially prominent.
- The centre now has a lower number of vacant units (11.4%) compared to the UK average (13.8%). This is a reversal of fortunes since 2021 when it had a rate higher (14.5%) than the UK average.
- In terms of improvements, improved visitor signposting to the car parks would be beneficial. A shopfront strategy could be implemented to assist in bringing all shopfronts up to the high standards set in general.

Great Dunmow Town Centre

Description

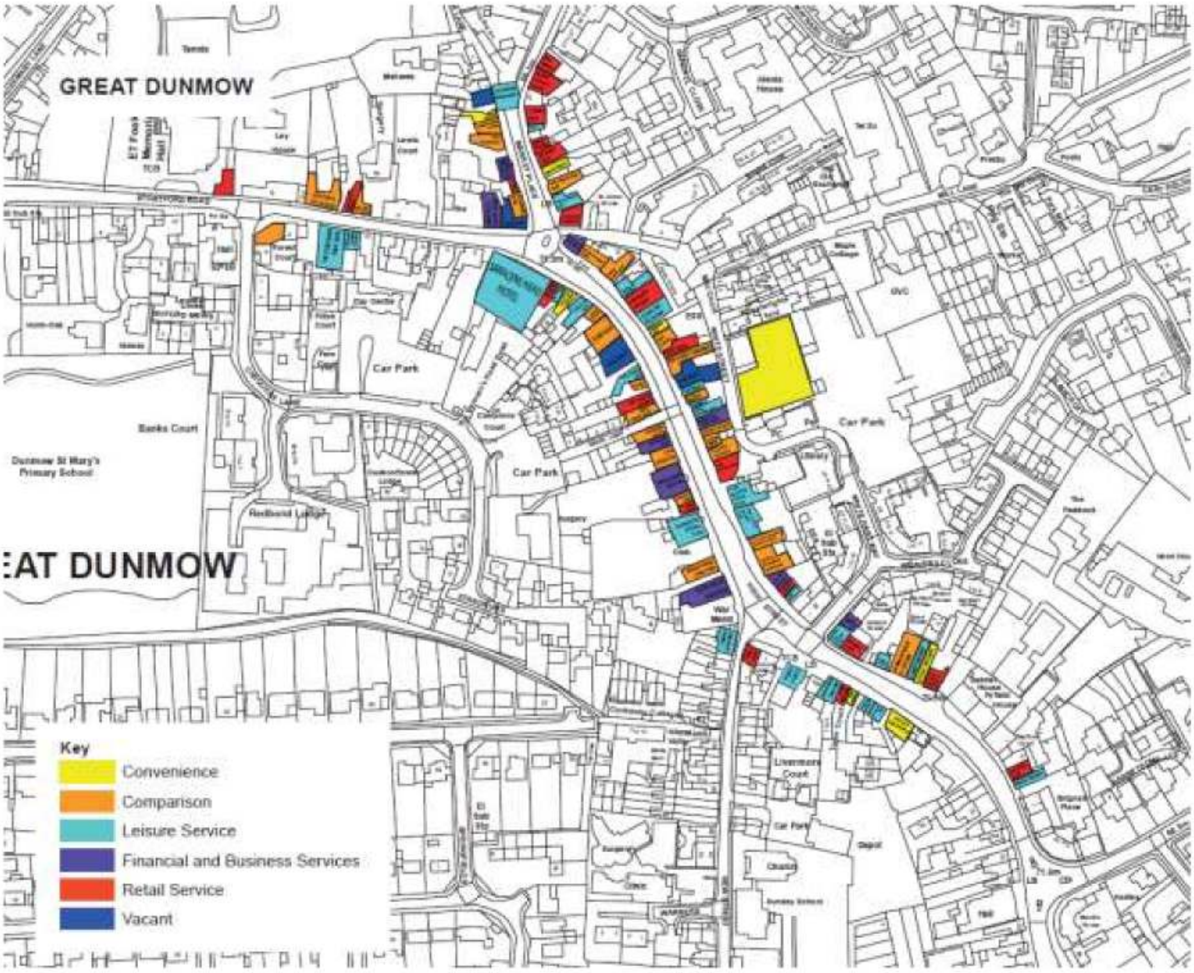
5.39 Great Dunmow is an historic market town located equidistant between Braintree and Bishops Stortford. The retail provision in the centre is primarily located along High Street and Stortford Road.

5.40 Great Dunmow is classed as a 'Town Centre' within the Uttlesford Local Plan (Adopted 2005) as well as the current Regulation 18 Plan (2023).

Overall Composition

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

Figure 25. Great Dunmow Composition Map



5.42 Figure 26 provides an overview of Great Dunmow's composition at the time of the site visits in July 2023, compared to the UK averages (2023), as well as a comparison to previous centre surveys carried out in 2010 and 2021.

Figure 26. Great Dunmow Town Centre Composition

Categories	Units 2010 (%)	Units 2021 (#)	Units 2021 (%)	Units 2023 (#)	Units 2023 (%)	UK Average Units 2023 (%)
Convenience	9.4	8	8.3	8	8.2	9.3
Comparison	35.4	24	25.0	26	26.8	26.9
Retail Services	-	*23*	*24.0*	*21*	*21.6*	*15.8*
Leisure Services	-	*23*	*24.0*	*28*	*28.9*	*25.3*
Financial & Business Services	-	*13*	*13.5*	*10*	*10.3*	*8.7*
Services	51.0	59	61.5	59	60.8	49.8
Vacant	4.2	5	5.2	4	4.1	13.8
Total	**100**	**96**	**100**	**97**	**100.0**	**100.0**

Source: Nexus Planning 2023
Note: Data analysed for 2021 and 2023 uses the current Goad category definitions to allow comparison with UK averages
Note: Data analysed for 2010 using superseded Goad category definitions to allow comparison with historic data.

Convenience

5.43 The provision of convenience goods units in Great Dunmow is just below the UK average of 9.3%. The main offer is a Co-Operative foodstore, located behind the high street (725 sq m net). The convenience offer also includes a One Stop along with other smaller, independent convenience units including 2 butchers and 2 delicatessens.

Comparison

5.44 The centre has seen a significant decrease in the number of comparison units since 2010, at which point, there were 34 units (35.4%). In 2023 comparison units accounted for 26 units (26.8%), which is in line with the UK average.

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

Services

5.46 Services account for 60.8% of units within Great Dunmow, which significantly exceeds the UK average of 49.8%. The services provision for the centre has increased since the 2010 health-check, when they accounted for 51.0% of units in the centre.

5.47 Retail services make up 21.6% of the units, higher than the UK average of 15.8%. A majority of the retail services are made up of the ‘health and beauty sector’.

5.48 Leisure services account for 28.9% of the centre, which is comparable with the UK average of 25.3%. The leisure services within the centre comprise cafes, fast food and takeaways, as well as restaurants, public houses and hotels.

5.49 The centre has a slightly higher percentage of financial and business services (10.3%) compared to the UK average of 8.7%. The financial and business services include a number of estate agents, as well as financial advisors and banks.

Vacancies

5.50 The number of vacant units within the centre has decreased from 5 to 4 units since 2021 and vacancy rate in the centre remains low at only 4.1%. This is significantly lower than the UK average of 13.8% and is positive in terms of the vitality and viability of this centre. The few vacancies there are, are spread throughout the centre, and as a result, there are no particular areas of concern in Great Dunmow.

Pedestrian Flows

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

Accessibility

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

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

- Angel Lane – 31 spaces (maximum stay 3 hours for £1.20)
- Chequers Lane – 67 Spaces (maximum stay 3 hours for £1.20)
- New Street – 11 Spaces (maximum stay 3 hours for £1.20)
- White Street – 172 spaces (up to £3.50 for 9 hours, with monthly, quarterly, bi-annually or annual rates are also available).

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

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

5.556 The results of the household survey showed that a 77.9% of people questioned travelled to the centre by private vehicle as either the driver or passenger. A significant number of people stated that they walked into the town centre (16.7%). 3.6% of people accessed the centre using bus.

Perception of Safety

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

5.58 This is verified by crimerate.co.uk who recorded that the prevalence of crime in Great Dunmow in 2023 is 30% below the UK average.

Opening Hours

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

Environmental Quality

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

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

Barriers to Entry

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

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

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

Customer Views & Behaviour

5.65 When asked what they most liked about Great Dunmow Town Centre, the most common responses from the NEMS household survey were ‘close to home or work’ (54.7%), ‘choice and range of shops’ (7.4%) and ‘environmental quality of centre’ (5.5%).

5.66 The top three responses to what would encourage respondents to visit the centre more often asked during the household survey were ‘increased choice and range of shops’ (14.6%), ‘a discount foodstore’ (11.4%) and ‘improved food shops in the town centre’ (9.0%).

Key Issues

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

- The composition of the Town Centre is broadly in line with UK averages.
- There are a very low number of vacant units (4.1%). This is a feature of health, but can also mean that it is difficult for new entrants to find an appropriate unit. The Council should listen to market signals on whether amalgamations or sub-divisions are appropriate.

- The centre would benefit from public realm improvements, including a general 'greening' of the centre, and perhaps creating a focal area by the War Memorial.
- The lack of availability of fee car parking is an issue for traders and local residents, and is a feature of the made Neighbourhood Plan. If the town centre started to exhibit features of decline, then no doubt the focus would sharpen on this issue.
- Great Dunmow is an attractive, characterful centre with a pleasant shopping environment.

Stansted Mountfitchet Local Centre

Description

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

5.69 Stansted Mountfitchet is classed as a 'Local Centre' within the Uttlesford Local Plan (Adopted 2005), and as a 'Local Rural Centre' in the Regulation 18 Plan (2023).

Overall Composition

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

Figure 27. Stansted Mountfitchet (Lower Street) Composition Map

Figure 28. Stansted Mountfitchet (Cambridge Road) Composition Map

5.71 Figure 29 provides an overview of Stansted Mountfitchet's composition at the time of the site visits in July 2023, compared to the UK averages (2023), as well as a comparison to previous health checks carried out in 2010 and 2021.

Figure 29. Stansted Mountfitchet Local Centre Composition

Categories	Units 2010 (%)	Units 2021 (#)	Units 2021 (%)	Units 2023 (#)	Units 2023 (%)	UK Average Units 2023 (%)
Convenience	18.6	6	11.8	6	11.8	9.3
Comparison	25.6	6	11.8	6	11.8	26.9
Retail Services		*14*	*27.5*	*13*	*25.5*	*15.8*
Leisure Services		*20*	*39.2*	*19*	*37.3*	*25.3*
Financial & Business Services		*4*	*7.8*	*4*	*7.8*	*8.7*
Services	51.2	38	74.5	36	70.6	49.8
Vacant	4.7	1	2.0	3	5.9	13.8
Total	**100.0**	**51**	**100.0**	**51**	**100.0**	**100.0**

Source: Nexus Planning 2023
Note: Data analysed for 2021 and 2023 uses the current Goad category definitions to allow comparison with UK averages
Note: Data analysed for 2010 using superseded Goad category definitions to allow comparison with historic data.

Convenience

5.72 There are 6 convenience units within Stansted Mountfitchet, making up 11.8% of all units, which is slightly higher than the UK average of 9.3%. The number of convenience units within the centre has dropped by two units since 2010.

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

Comparison

5.74 There are 6 comparison units within the centre, which make up 11.8% of all units, lower than the UK average of 26.9%. The number of comparison units within the centre has fallen from 25.6% in 2010. As such, Stansted Mountfitchet now has a considerably lower percentage of comparison goods units compared to the UK averages.

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

Services

5.76 Overall, services equate to 70.6% of units within Stansted Mountfitchet. This has increased considerably since the 2010 survey (51.2%).

5.77 There are numerous health and beauty units within the centre and a number of barber shops. Stansted Mountfitchet has a greater proportion of retail services (25.5%), compared to the UK average (15.8%).

5.78 The centre also has a higher proportion of leisure services (37.3%) compared to the UK average (25.3%). The leisure offer includes the Kings Arms public house, a social club, bars and restaurants as well as a large number of takeaways. For a centre of its size, the centre has an extensive service offer, which is no doubt linked to commuter custom to/from the mainline train station.

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

Vacancies

5.80 Stansted Mountfitchet has seen a slight increase in vacant units (5.9%), compared to the previous 2021 survey (2.0%). The proportion of vacant units in the centre remains though significantly below the UK average of 13.8%.

Pedestrian Flows

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

Accessibility

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

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

- Lower Street - 209 spaces (maximum stay 9 hours for £4.70)
- Crafton Green – 52 spaces (maximum stay 9 hours for £3.00)
- Station car park – 68 spaces (£7.00 for 9 hours)

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

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

5.86 The results of the household survey showed that only half of respondents travel to the centre by private vehicle (52.7%), whilst 42.5% had last walked to the centre. 3.6% of visitors arrived by bus.

Opening Hours

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

Environmental Quality

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

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

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

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

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

Barriers to Entry

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

5.94 It is evident that the centre is also heavily reliant on its train station, which serves the extensive service economy. It will be important to continue to monitor the health of the centre now that working patterns have changed following the pandemic in order to ascertain whether there has been any significant impact on trade. The has been a small increase in vacancy over the period since 2021.

Customer Views & Behaviour

5.95 When asked what they most liked about Stansted Mountfitchet Local Centre, the most common responses from the NEMS household survey were 'close to home' (41.9%), 'choice and range of shops' (18.0%) and 'environmental quality' (8.3%).

5.96 The top three responses to what would encourage respondents to visit the centre more often asked during the household survey stated 'more parking' (17.8%), 'increased choice and range of shops' (7.0%) and 'discount foodstore' (6.2%).

Summary

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

- The centre has two small foodstores but is very accented towards the provision of services which account for 70.6% of all units within Stansted Mountfitchet.

- Stansted Mountfitchet has very low vacancy which is an indicator of very good health. However, the centre is reliant on commuters utilising the train station and vacancy has increased slightly since 2021.

- Environmental improvements could be made to the centre, including opportunities for greenery and pavement improvements.

Appendix B – Statistical Tables

Nexus Planning
Uttlesford - Strategic Allocation Capacity

Table 1 - Average Household Size

Dwelling Size	Population	Household number	Average Persons per Household
1-bedroom	3,122	2,289	1.36
2-bedroom	12,467	6,601	1.89
3-bedroom	28,577	11,375	2.51
4+-bedroom	33,988	11,051	3.08

Source: ONS, Census 2021

Table 2 - Population at each Strategic Allocation

Strategic Allocation	Proposed Dwellings @ 2041	Proposed Population @ 2041
Great Dunmow	885	2,065
Takeley	1,506	3,514
Total	**2,391**	**5,579**

Source: Uttlesford Council
Proposed Population @ 2041 is Average Persons per Household per Bedroom Number (Table 1) x Proposed Dwelllings @ 2041

Table 3 - Experian Per Capita Expenditure Growth Forecasts

Year	Convenience	Comparison
2022	-5.0%	3.3%
2023	-2.9%	-2.3%
2024	-1.0%	-3.1%
2025	-0.6%	1.2%
2026	-0.4%	2.9%
2027	-0.2%	2.5%
2028	-0.1%	2.2%
2029	-0.1%	2.3%
2030	-0.1%	2.3%
2031	-0.1%	2.4%
2032	-0.1%	2.4%
2033	0.0%	2.6%
2034	0.0%	2.6%
2035	0.0%	2.5%
2036	0.0%	2.5%
2037	0.0%	2.6%
2038	0.0%	2.6%
2039	0.0%	2.6%
2040	0.0%	2.6%
2041	0.0%	2.6%

Source: Experian Retail Planner Brefing Note 21 (February 2024) - Figure 7 ('Adjusted SFT')

Table 4a - Estimated Available Convenience Expenditure at each Strategic Allocation @ 2041

Strategic Allocation	Total Population	Per Capita Convenience Expenditure @ 2023	Per Capita Convenience Expenditure @ 2041	Estimated Available Convenience Goods Expenditure @ 2041 (£m)	Estimated Available 'Main Food' Goods Expenditure @ 2041 (£m)	Estimated Available 'Top up' Goods Expenditure @ 2041 (£m)
Great Dunmow	2,065	2,666	2,612	5.4	4.0	1.3
Takeley	3,514	2,532	2,482	8.7	6.5	2.2
Total	**5,579**			**14.1**	**10.6**	**3.5**

Notes:
Populations from Table 1
Per Capita Convenience @ 2023 from Experian App Library 2022 report, Great Dunmow data from E02004597 and Takeley data from E02004596
Per Capita Convenience @ 2041 is the 2023 figures projected forwards by the annual growth forecasts in Table 3
The split between main food and top up is based on a 75%/25% split in line with Nexus experience and professional judgment

Table 4b - Estimated Available Comparison Expenditure at each Strategic Allocation @ 2041

Strategic Allocation	Total Population	Per Capita Comparison Expenditure @ 2023	Per Capita Comparison Expenditure @ 2041	Estimated Available Comparison Goods Expenditure @ 2041 (£m)
Great Dunmow	2,065	4,127	6,042	12.5
Takeley	3,514	3,986	5,836	20.5
Total	**5,579**			**33.0**

Notes:
Populations from Table 1
Per Capita Comparison @ 2023 from Experian App Library 2022 report, Great Dunmow data from E02004597 and Takeley data from E02004596
Per Capita Comparison @ 2041 is the 2023 figures projected forwards by the annual growth forecasts in Table 3

Table 5a - Estimated Floorspace Capacity for 'Top-up' Convenience Goods @ 2041

Strategic Allocation	Estimated Available 'Top up' Goods Expenditure @ 2041 (£m)	Estimated Retention of Expenditure @ 75% (£m)	Estimated Inflow of Trade @ 20% (£m)	Total 'Top up' Goods Expenditure Available (£m)	Estimated Average Sales Density for Convenience Retailers (£/sq m)	Estimated 'Top up' Convenience Floorspace Capacity by 2041 (Sq m)
Great Dunmow	1.3	1.0	0.2	1.2	9,500	128
Takeley	2.2	1.6	0.3	2.0	9,500	207
Total	**3.5**	**2.6**	**0.5**	**3.2**		**334**

Notes:
Estimated available 'Top-up' Expenditure taken from Table 4a
Assumed retention of 75% of available strategic allocation residents spend + Inflow of 20% of trade from beyond the strategic allocation
Average sales density based on Nexus Planning professional judgment

Table 5b - Estimated Floorspace Capacity for Comparison Goods @ 2041

Strategic Allocation	Estimated Available Comparison Goods Expenditure @ 2041 (£m)	Estimated Retention of Expenditure @ 5% (£m)	Estimated Inflow of Trade @ 10% (£m)	Total Comparison Goods Expenditure Available (£m)	Estimated Average Sales Density for Comparison Retailers (£/sq m)	Estimated Comparison Floorspace Capacity by 2041 (Sq m)
Great Dunmow	12.5	0.6	0.1	0.7	5,000	137
Takeley	20.5	1.0	0.1	1.1	5,000	226
Total	**33.0**	**1.6**	**0.2**	**1.8**		**363**

Notes:
Estimated available comparison goods Expenditure taken from Table 4b
Assumed retention of 5% of available strategic allocation residents spend + inflow of 10% of trade beyond the strategic allocation
Average sales density based on Nexus Planning professional judgment

Table 6 - Indicative Floorspace Capacity at each Strategic Allocation @ 2041

Strategic Allocation	Estimated Convenience Goods Floorspace Capacity (sq m)	Estimated Comparison Goods Floorspace Capacity (sq m)	Estimated Service Goods Floorspace Capacity (sq m)	Total Floorspace (sq m)
Great Dunmow	128	137	177	442
Takeley	207	226	288	720
Total	**334**	**363**	**465**	**1,162**

Notes:
Service goods floorspace capacity assumes this will account for 40% of total floorspace

Nexus Planning
London

nexusplanning.co.uk