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Brentwood Retail and Commercial Leisure Study



Executive Summary

December 2014



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Executive Summary

This Retail and Commercial Leisure Study has been prepared by Nathaniel Lichfield & Partners (NLP) on behalf of Brentwood Borough Council. It is intended to form part of the evidence base for the emerging Local Plan which will cover the period to 2030.

The study provides a qualitative analysis of the existing retail and leisure facilities within the Borough, and a quantitative and qualitative assessment of the need for new retail, leisure and other main town centre uses. The key findings of the study are set out below.

Overview of the Shopping Hierarchy

Brentwood town centre is the main shopping centre in the Borough. Centres at Shenfield, Ingatestone and Warley Hill effectively function as district centres, and the Borough also contains a number of smaller villages/local shopping parades.

Brentwood town centre is categorised as a sub-regional centre (Venuescore), and it falls within the catchment areas of much larger competing centres e.g. Chelmsford, Basildon and Romford. In addition, intu Lakeside, Bluewater, Westfield Stratford and Central London are all easily accessible to residents in Brentwood Borough. The strength of this competition restricts the Borough's market share of expenditure, particularly for comparison goods.

Brentwood town centre has a reasonable number of convenience and comparison retail units and a mix of both multiple and independent traders. The proportion of comparison goods operators is above the national average, and the centre has a good provision and range of comparison categories. The main convenience offer of the centre is the large Sainsbury's supermarket, which suffers from congestion at busy periods. Shopping facilities are supported by a variety of non-retail services, community and leisure facilities. The centre has a good provision of banks, hairdressers, estate agents, cafés, restaurants and takeaways.

Shenfield and Warley Hill are located within the Brentwood urban area and provide a more local service to residents. Ingatestone is a more traditional village centre and serves its settlement and the rural catchment area, providing a range of shops and non-retail services. The comparison shopping offer of these centres is focused on lower order day to day products. Food and grocery shopping is a key element of these centre's overall attraction.

Future Requirements

The retail needs assessment identified floorspace requirements for the Borough over the Plan period to 2030.

The short to medium term capacity figures up to 2020 suggest surplus of available convenience goods expenditure could support an additional 2,151 sq.m net (3,074 sq.m gross), primarily concentrated in Brentwood town centre.

In the long term, surplus expenditure at 2030 could support 3,833 sq.m net of sales floorspace (5,475 sq.m gross) in the Borough as a whole.

For comparison goods, for the Borough as a whole, the surplus expenditure could support an additional 1,193 sq.m net (1,591 sq.m gross) by 2020. The surplus expenditure at 2030 could support 4,844 sq.m net (6,458 sq.m gross). The vast majority of this surplus is for Brentwood town centre, with only a very limited amount identified for the rest of the Borough.

The assessment also identifies a requirement for 2,954 sq.m gross of food and drink (A3-A5) floorspace and 1,654 sq.m gross of other class A1 service uses up to 2030.

The proposed redevelopment of the William Hunter Way site is likely to provide up to 8,000 sq.m of Class A1-A5 floorspace, plus a new cinema. This would absorb a significant proportion of the retail floorspace requirements for Brentwood town centre. The Baytree Centre also provides a further development opportunity within the town centre.

There is a limited requirement for further floorspace within Shenfield, Ingatestone and Warley Hill over the Plan period.

The commercial leisure assessment concludes that a cinema would be desirable to meet the needs of local residents. There is limited potential for other large scale commercial leisure facilities over the Plan period.

Recommendations

The principles of the NPPF indicate that the Council's policy approach should aim to at least fully meet needs, so that the local economy is not constrained and potential investment is not diverted elsewhere or lost. The sequential approach suggests that designated town centres should be the first choice for retail, leisure and main town centre uses. All development should be appropriate in terms of scale and nature to the centre in which it is located.

Given the existing low levels of vacant floorspace within the centres, it is unrealistic to plan to achieve a reduction in vacancy rates, and the reoccupation of vacant premises is unlikely to help accommodate growth.

Within Brentwood town centre, the William Hunter Way site remains the key opportunity for accommodating growth. Aspirations to improve the area around the Baytree Centre could incorporate restaurant/café uses to create more of a destination shopping experience. Diversification of the High Street offer is critical for ensuring that the centre remains an attractive destination, and the eastern end of the High Street in particular could become more of a non-retail quarter, building on existing leisure uses in this part of the town centre.

If Brentwood cannot accommodate the floorspace projection within the town centre, it may be appropriate to allocate sites elsewhere within the Borough, potentially within the smaller centres or to the strategic residential allocations.

Within Shenfield, Ingatestone and Warley Hill, development options for additional retail floorspace are limited. The future strategy for these centres should focus on the reoccupation of vacant units and small scale intensification and extensions.

The increased number of passengers travelling through and using the Crossrail station at Shenfield and Warley Hill (Brentwood Station) could lead to a demand for additional or improved retail and service facilities over and above the identified floorspace requirements. There are limited short term opportunities for additional development in the vicinity of these stations, but in the longer term, sites could become available to meet anticipated future needs.

Other local centres in the Borough should continue to play their important role in providing day to day shops and services that are accessible to residents in villages and rural parts of the Borough.

If the potential strategic residential development at West Horndon is delivered then a new local centre of around 2,000 sq.m gross would be appropriate to support the new residents. This would need to ensure that it would complement rather than compete directly with the existing local centre.

The study provides a broad overview of the potential need for further retail and commercial development in the short – medium term up to 2020, with longer term forecast up to 2025 and 2030. Projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available, in particular longer-term projections up to 2030 should be treated with caution.



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