

Harlow Retail & Leisure Needs Study 2016

Volume 1 — Main Report | January 2017 | Final Report



on behalf of **Harlow**
Council
Working together for Harlow



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Contact:

Adam Bunn, Associate

DD: 020 7911 2209 / M: 07757 202 784

adam.bunn@gva.co.uk

Caroline Marginson, Director

DD: 020 7911 2551 / M: 07818 001 658

caroline.marginson@gva.co.uk

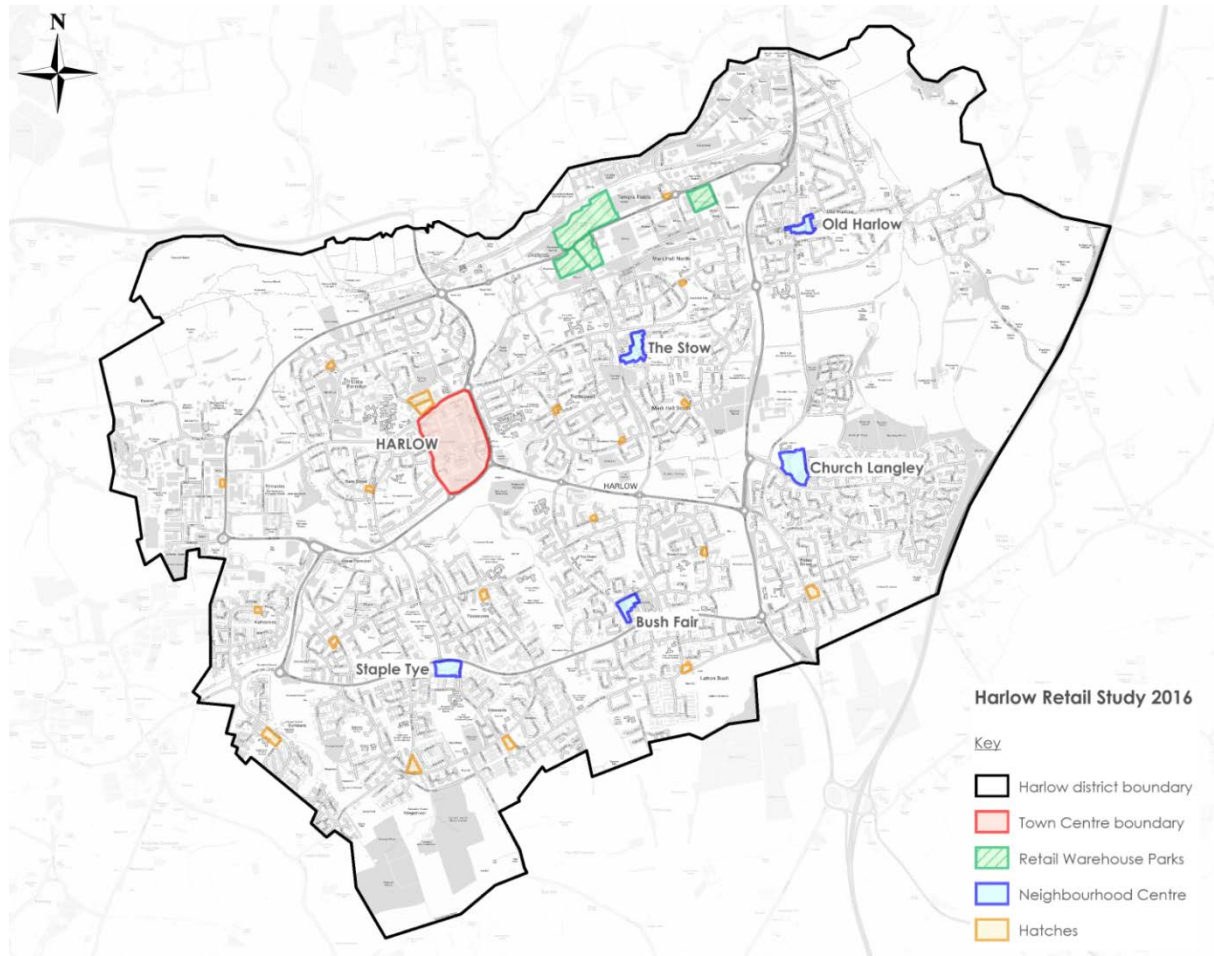
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For and on behalf of GVA Grimley Ltd

1 INTRODUCTION

- 1.1 Bilfinger GVA have been instructed by Harlow Council to undertake an updated **Retail & Leisure Needs Study** for the District. The study will form part of the evidence base which will underpin the production of the Council's new Local Plan which will, upon adoption, set out a vision for and guide development in the District over the next 15 years. The Retail & Leisure Needs Study will be used to inform the retail policies in the new Local Plan, and the potential allocation of retail floorspace between Harlow town centre and the network of neighbourhood centres.
- 1.2 This study provides:
- A review of relevant national and local planning policy in relation to retail and town centre development;
 - An assessment of current and future market trends in the retail and leisure sectors, including the influence of online shopping and other sectoral trends;
 - An assessment of existing retail and commercial leisure provision (including 'evening economy' uses) in the network of town and neighbourhood centres in the District;
 - A broad overview of changes and planned retail commitments in key competing centres such as Bishop's Stortford, Brookfield (Cheshunt), Welwyn Garden City, Lakeside and Chelmsford;
 - An updated household telephone survey of shopping patterns of residents in Harlow District and surrounding areas, which also identifies patterns of leisure trips, and attitudinal responses in terms of likes and dislikes about the centres in the District which they use;
 - Updated estimates on the growth in comparison (non-food), convenience (food) and commercial leisure expenditure over the period to 2033, including 'scenario testing' based on different levels of strategic housing growth which are expected to come forward within and surrounding the Harlow urban area;
 - Updated estimates of the quantitative 'need' for new comparison and convenience goods floorspace with the Council should plan for over the period to 2033, having regard to the NPPF requirement that local planning authorities must identify sufficient sites to meet identified needs in full;
 - A high-level consideration of opportunity sites to accommodate the identified needs; and
 - A series of strategic recommendations to help guide the formulation of retail policies in the Council's new Local Plan.
- 1.3 Our study covers the entirety of Harlow District, but focuses on Harlow town centre and the supporting network of neighbourhood centres, and, to a more limited extent, the 'hatches' which meet local shopping needs. A plan of the District showing network of centres which make up Harlow District is shown in **Figure 1.1** overleaf (a larger version is provided at Plan 1 of Volume 2 of this report).
- 1.4 The outputs of the study provide the Council with a clear strategy for its network of centres to ensure that they remain attractive, vibrant retail centres over the course of the Plan period, fully able to meet local residents' shopping, leisure, services and cultural needs. Our study provides a robust evidence base which is fully compliant with the National Planning Policy Framework (NPPF), which the Council will be able to use to inform policy development and land use allocations. We also expect that the study will be used by the Council to assist in the determination of applications for new retail development in the District.

Figure 1.1: Harlow District boundary & centres plan



1.5 Our study has been informed by on-site and desk-based information-gathering, including site visits to each of the town and neighbourhood centres in the District, as shown in Figure 1.1. As noted above, further evidence is provided by way of an updated household telephone survey of shopping and leisure patterns across the District, and adjacent surrounding areas in which residents may look towards facilities in the District to meet their shopping and leisure needs (we refer to the area over which the household telephone survey was undertaken as the ‘survey area’ throughout this report). The results of the survey can also be used to understand the extent to which centres surrounding the District are competing for spending with the network of centres in Harlow District.

1.6 The extent of the survey area was agreed with the Council at the initial stage of preparation of this study, and reflects that which was used in the Council’s previous retail capacity evidence base studies in 2007, 2010 and 2011, which were all also undertaken by GVA. A plan of the survey area is provided at Plan I of Volume 2 (and is also set out at Figure 6.1 of this report).

Structure of remainder of report

1.7 Our report is split into three volumes. This report forms Volume 1 to the study; Volume 2 sets out supporting plans and appendices; Volume 3 provides the household telephone survey data (prepared by NEMS Market Research). The remainder of this report (Volume 1) is structured as follows:

- **Section 2** sets out our review of national, strategic and local planning policies relevant to retail and leisure planning;
- **Section 3** considers national trends in the retail sector, and in particular the implications of recent economic growth and technological advances which are impacting on shopping habits;
- **Section 4** considers the wider study context, identifying the most popular shopping destinations for residents in the survey area which we have used as the basis of our assessment, the key competing centres surrounding this survey area, and the extent to which these competing centres influence the shopping patterns of residents;

- **Section 5** reviews the composition, role and function of current shopping and commercial leisure provision in Harlow town centre and the network of neighbourhood centres through 'health check' assessments, as well as reviewing out-of-centre shopping provision across the District;
- **Section 6** sets out our approach to calculating retail capacity, including definition of the household telephone survey area and discussion of approach to the household telephone survey;
- **Section 7** sets out the quantitative 'need' for additional convenience (food) and comparison (non-food) retail floorspace in the District, over the study period to 2033;
- **Section 8** sets out our review of commercial leisure provision within and outside the District, and draws conclusions on the quantitative and qualitative need for additional commercial leisure facilities; and
- **Section 9** draws our analysis together and set out conclusions, strategic guidance and recommendations on future change and growth in the District's network of centres.

Key terms

- 1.8 A glossary of key terms which are used throughout this study is appended to the rear of Volume I.

2 PLANNING POLICY CONTEXT

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

National policy context

National Planning Policy Framework (NPPF), 2012

- 2.1 The National Planning Policy Framework (NPPF), published on 27 March 2012 sets out the Government's planning policies for England and replaces the suite of national Planning Policy Statements, Planning Policy Guidance and Circulars with a single document.
- 2.2 The NPPF continues to recognise that the planning system is plan-led and therefore Local Plans, incorporating neighbourhood plans where relevant, are the starting point for the determination of any planning application. In line with the Government's aim to streamline the planning process, each Local Planning Authority (LPA) should produce a single Local Plan for its area with any additional documents to be used only where clearly justified.
- 2.3 The NPPF maintains the general thrust of previous policy set out in PPS4 – Planning for Sustainable Economic Growth (2009). It advocates a 'town centres first' approach, and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. In planning for town centres LPAs should:
 - Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
 - Define a network and hierarchy of centres that is resilient to anticipated future economic changes;
 - Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary shopping frontages in designated centres and set policies that make clear which uses will be permitted in such locations;
 - Promote competitive town centres that provide customer choice and a diverse retail offer which reflect the individuality of town centres;
 - Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
 - Allocate a range of suitable sites to meet the scale and type of economic development needed in town centres. Where town centre sites are not available, LPAs should adopt a sequential approach to allocate appropriate edge of centre sites;
 - Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
 - Recognise that residential development can play an important role in ensuring the vitality of centres; and
 - Where town centres are in decline, plan positively for their future to encourage economic activity.
- 2.4 LPAs should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. These assessments should be integrated and take full account of relevant market and economic signals. LPAs should use the evidence base to assess, inter alia:
 - The needs for land or floorspace for economic development, taking account of both quantitative and qualitative requirements for all foreseeable types of economic activity over the plan period, including retail and commercial leisure development;
 - The existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs;
 - The role and function of town centres and the relationship between them, including any trends in the performance of centres; and
 - The capacity of existing centres to accommodate new town centre development.

- 2.5 The Local Plan will be examined by an independent inspector whose role it is to assess whether the plan is sound. In order to be found sound the Plan should be:
- Positively prepared i.e. based on a strategy which seeks to meet objectively assessed development and infrastructure requirements
 - Justified i.e. the most appropriate strategy, when considered against the alternatives;
 - Effective i.e. deliverable over its plan period and based on effective joint working; and
 - Consistent with national policy i.e. enable the delivery of sustainable development
- 2.6 Overall, the NPPF adopts a positive approach, with a presumption in favour of sustainable development and support for economic growth. In terms of decision-making, applications for planning permission must be determined in accordance with the development plan unless material considerations indicate otherwise. The NPPF is a material consideration in planning decisions.

National Planning Policy Guidance (NPPG) (2014)

- 2.7 In March 2014 the Department for Communities and Local Government (DCLG) launched the online planning practice guidance, which cancelled a number of previous planning practice guidance documents, including the Practice Guidance on Need, Impact and the Sequential Approach (2009). Although it does not constitute a statement of Government policy, it provides technical guidance on how to prepare a robust evidence base and how to assess the impact of proposals for main town centre uses. The web-based resource provides guidance on how to assess and plan to meet the needs of main town centre uses in full through production of a positive vision or strategy for town centres.

Local policy context

Adopted Replacement Harlow Local Plan (July 2006)

- 2.8 The Adopted Replacement Harlow Local Plan (ARHLP) (July 2006) ‘expired’ on 13 July 2009, three years from the date of the adoption of the Local Plan. A schedule of policies were saved from the Adopted Replacement Local Plan, on 12 May 2009, and any policies which were not included in this schedule are no longer used by Harlow Council to determine planning applications and to guide development across Harlow District.

Local Plan ‘Saved’ Policies

- 2.9 On issuing the direction to ‘save’ the chosen list of policies from the ARHLP, the authority of the Secretary of State expressed the importance of considering the policies in context. They advised that the dated nature of the policies will mean that material considerations in the form of emerging/ new national and regional policy and new evidence will be afforded ‘considerable weight’ in the decision making process.
- 2.10 In determining applications for retail development, Policy RTCS1 states that a sequential approach will be applied in the following order of preference:
- Town Centre;
 - Edge-of-centre;
 - Neighbourhood Centre;
 - Hatches
- 2.11 Development on sites outside of these locations may be considered acceptable provided there is demonstrable need and the sites are accessible by a choice of means of transport. Local shopping and associated services for large scale new housing development may also be permitted on sites that are not within the retail hierarchy as long as they do not impact negatively upon the vitality and viability of the centre or hatch. All development must be appropriate to the function size and character of the centre concerned. It should be noted that the approach set out in policy RTCS1 is not fully reflective of the more up-to-date NPPF in terms of the application of the sequential approach and also the fact that there is no longer a requirement for application for new development to demonstrate ‘need’.
- 2.12 Policy RTCS2, similarly reiterates that for all retail development proposals must not forfeit the vitality and viability of existing centres and proposals must be within accessible locations. Further to this, the Policy states that new retail development must not give rise to access and road safety issues, while appropriate parking and amenity standards must be met.

- 2.13 The Council will seek to approve applications which will strengthen the existing role of the town centre within the aforementioned retail hierarchy. Policy RTCS3 lists the means by which retail proposals can support existing town centres. This includes:
- Improving the range and quality of facilities including retailing, employment, leisure, entertainment and culture to encourage a vital and vibrant town centre environment throughout the day and in the evening;
 - Increasing the diversity, quality and inclusive nature of employment opportunities, leisure, social, educational and cultural facilities, to meet the needs of the local population;
 - Managing road traffic and improving access and road safety, while improving facilities for passenger transport users (particularly the completion of the bus station), pedestrians, cyclists and those with special needs, and providing car parking where appropriate;
 - Enhancing the town centre’s character and appearance;
 - Improving facilities for disabled people, elderly people and carers with babies and children;
 - Providing mixed use development including residential or other suitable uses on vacant or underused upper floors;
 - Retaining key facilities that contribute to the range of offer in the town centre or that act as anchors or catalysts which assist in retaining existing or attracting new operators.
- 2.14 Policy RTCS4 determines that those retail proposals that will improve the environmental quality of the town centre and be of overall benefit to those working, visiting or living in the centre will be granted permission.
- 2.15 The Council seeks to maintain the retail shopping core of the town centre and as such places restrictions on change of use within primary and secondary shopping frontages. Policy RTCS10 seeks to protect Class A1 shops by allowing no more than 15% of primary frontages to be occupied by non –retail uses. Further to this the Policy states that no more than two A3 uses should adjoin each other and for every five units only two are permitted for non-retail uses. A change of use from A1 to A2 or A3 may be permitted should these policy requirements be complied with.
- 2.16 Policy RTCS11, which applies to secondary frontages, is more flexible in the respect that permission will be granted for a change of use to the uses listed below providing that there is no loss in key facilities that contribute to the offer in the town centre; there is not detrimental visual impact on the area; and unacceptable levels of noise and disturbance is not created as a result of the proposals: Class A1 (shops); Class A2 (financial and professional services); Class A3 (food and drink); Class D1 (non-residential institutions); Class D2 (assembly and leisure); Sui Generis (amusement centres).

Harlow Town Centre

- 2.17 Harlow Town Centre is divided into three different sections which are named Town Centre North, Town Centre Central and Town Centre South. Each section of the centre has its own policy requirements and these are detailed accordingly in the following sub sections.

Town Centre North

- 2.18 The Council will grant planning permission for a range of development types in Town Centre North, provided that key facilities, which anchor the area and contribute to the range of offer in the town centre, are not lost. The types of acceptable development are set out in Policy RTCS5 and are as follows:
- Entertainment and leisure uses;
 - Food and drink uses (A3);
 - Hotel and conference facilities;
 - Health and fitness uses;
 - Playhouse relocation (if required);
 - Refurbishment/relocation of the market;
 - Office uses (upper floors);
 - Residential uses (upper floors);
 - Shops (A1)

Site Allocations in Town Centre North

- 2.19 Sites allocated for redevelopment in Town Centre North are set out in Policy RTCS6 and defined on the Adopted Replacement Harlow Local Plan Proposals Map 2006 (see **Figure 2.1**).

Land south of Fourth Avenue and north of Kitson Way and Post Office Road (RTCS6/1)

- 2.20 The site has been identified for a landmark building and the preferred uses are a hotel and a conference centre. Loss of public parking spaces should be minimal and new buildings would be required to provide frontages to Fourth Avenue and Velizy Avenue. Subsequent to the publication of the ARHLP, permission (Ref no. HW/PL/10/00347) was granted on 20/07/2012 for demolition and redevelopment of the multi-storey car park at Kitson Way to create a mixed-use scheme comprising 170 apartments and 856 sq. m of commercial floorspace (A1-A5, B1(a), D1, D2) and creation of a new public realm. It appears construction has yet to commence.

Post Office and Adams House East (RTCS6/2)

- 2.21 The post office is considered to be a key town centre facility that would need to be integrated within a new development scheme or relocated to an appropriate site within the town centre.

Market Square and Northgate (RTCS6/3)

- 2.22 The Market is another key facility within the town centre which would need retained, although possibly at a reduced capacity, or relocated to another town centre site. There are no firm plans and it is currently not clear what aspirations the Council has for sites RTCS6/2 and RTCS6/3.

Town Centre Central

- 2.23 Policy RTCS7 requires a comprehensive Improvement Masterplan for Town Centre Central, to address the issues of the area. This includes an improved retail offer both in terms of quality and increased capacity of comparison goods floorspace (including a department store). Further to this the policy requires a mix of uses, incorporating residential and office on upper floors, and overall improvements to pedestrian linkages and environmental quality of the town centre.

Site Allocations in Town Centre Central

Playhouse Square Site (RTCS8)

- 2.24 Proposals for the Playhouse Square site which contains the Playhouse theatre and a church, will be granted permission for an 'appropriate' town centre use (undefined) and either improve/ create an extension of the existing Playhouse Theatre or relocate to a larger facility on an appropriate Town Centre North site.
- 2.25 Subsequent to publication of the ARHLP the following applications have been granted permission at the Harvey Centre, located within Town Centre Central:

- A new cinema and restaurant units on the first floor of the existing Harvey Centre, granted permission on 21/06/2012. (Ref no. HW/PL/12/00143, commenced trading December 2016)
- Extension to the Harvey Centre, granted permission on 15/05/2006. The development proposals comprise 27 Retail Units and a two-storey Department Store equating to 22,249 sq. m of retail floorspace (Ref no. HW/ST/03/00118). This permission has not been implemented and has now expired.
- Permission has been granted for refurbishment of the former Marks & Spencer unit at the Harvey Centre to enable delivery of eight modern retail units, ranging between 139 and 2,800 sq.m. The permission has been implemented and a number of units are now trading.

Town Centre South

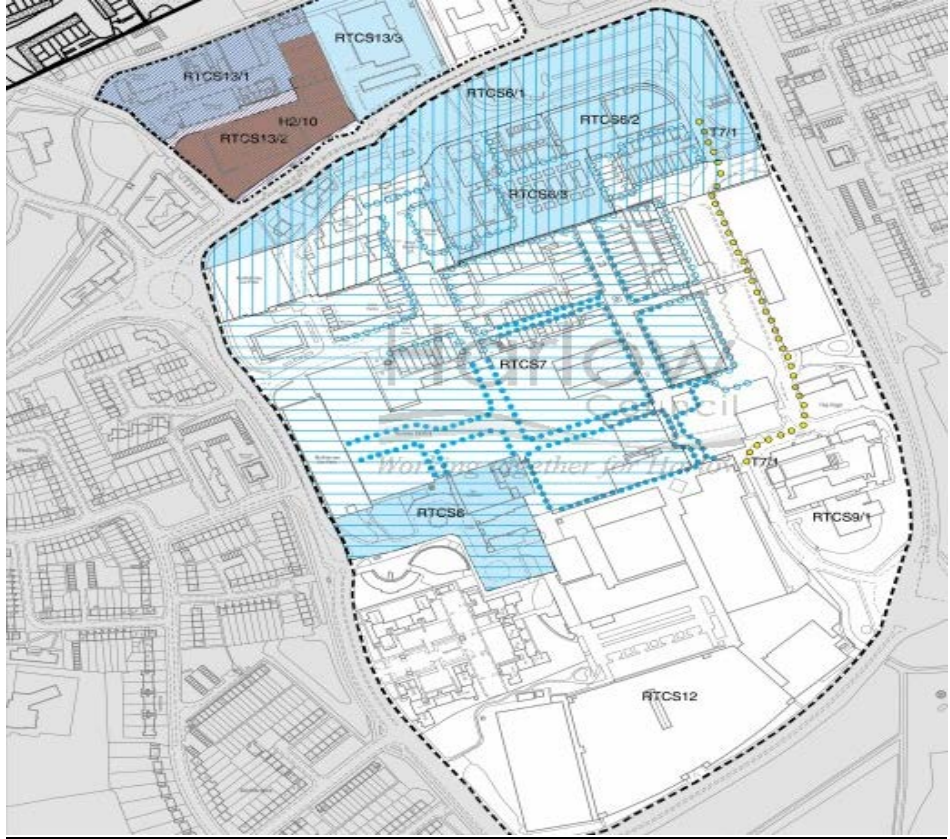
- 2.26 Under Policy RTCS12, The Town Centre South development will be subject to the primary frontage change of use Policy RTCS10. The policy states that this will apply once retail trading commences. The Water Gardens development was completed in November 2004 and is therefore now subject to his policy.

Other Site Allocations within Harlow Town Centre

Magistrates Court (RTCS9)

- 2.27 New development on the Magistrates Court site should be designed as a landmark building. If the Magistrate’s Court is relocated to an alternative location, then the existing site should incorporate office use.

Figure 2.1: Harlow town centre proposals map extract



Source: Adopted Harlow Replacement Local Plan (2006)

Neighbourhood Centres and Hatches

- 2.28 Neighbourhood centres and hatches are considered to play an important role in providing local facilities for residents which can help reduce car travel and increase sustainability. The Local Plan seeks to improve the vitality and viability of the neighbourhood centres and hatches. The defined neighbourhood centres — Bush Fair, Church Langley, Old Harlow, Staple Tye and The Stow are identified on the Adopted Proposals Map. Hatches identified on the Adopted Proposals Map are: **Burgoyne, Cawley, Clifton, Colt, Coppice, Elm, Fishers, Katherines, Manor, Maunds, Mill, Pollards, Prentice Place, Pypers, Sherards, Slacksbury, Sumners and Ward.**
- 2.29 Policy RTCS14 helps to ensure that only proposals which strengthen and maintain the role of the neighbourhood centres and hatches will be permitted planning permission. The council will encourage proposals which improve the range and quality of the existing facilities appropriate to the size of the centre and which meet the needs of the local population. Retention of key facilities which anchor the area and assist in retaining and attracting existing or new operators will be required by the Council.
- 2.30 The Council seeks to enable a mix of uses within neighbourhood centres and hatches, given size restraints, which complement the existing provision of shops. Compliance with Policy RTCS15 will be required where a change of use is proposed. Generally, uses A1, A2, D1, D2 and Launderettes (Sui Generis) will be permitted. This is providing that neighbourhood centres and hatches with five or more original units retain 40% of Class A1 (shop) use in shopping frontages; and hatches with four or fewer original units and Church Langley neighbourhood centre (excluding Tesco) retain a minimum of two units in Class A1 (shop) use.

Stow and Bush Fair Neighbourhood Centres (RTCS16)

- 2.31 The Council consider The Stow and Bush Fair neighbourhood centres to be dated and have a poor quality environment. They have been identified for improvement and potential partial or full redevelopment. According to Policy RTCS16, improvement and partial redevelopment (where necessary) will be supported and in exceptional cases full redevelopment of the Centres will be considered.

Hatches (RTCS17)

- 2.32 Proposals for the improvement or redevelopment of hatches for mixed –use development, which includes expansion of the retail offer, will be favourably considered according to Policy RTCS17. The council may also consider developing parcels of land which adjoin the hatch to achieve this redevelopment.

Retail Warehouse Parks

- 2.33 Harlow has four retail warehouse parks, located at out of centre sites along Edinburgh Way, which primarily accommodate large units selling non- food bulky goods. The sites identified on the Adopted Proposals Map are: Queensgate Centre, The Oaks, Princes Gate and St. James Centre. In order to protect the function of these retail warehouse parks, Policy RTCS19 restricts proposals for new development within retail warehouse parks which include the following:

- The subdivision of units;
- The sale of items other than DIY goods, furniture, floor coverings, leisure and garden products, motor accessories and electrical goods;
- The Change of use from Class A1 (shop) use to any other use

The Stow Supplementary Planning Document (July 2016)

- 2.34 The Stow Supplementary Planning Document was adopted in July 2016. The purpose of the document is to provide a clear, robust and deliverable Design Framework to regenerate The Stow. The SPD has five main themes around refocusing, reconnecting, revealing, restoring and redefining the neighbourhood centre. The document sets out a number of short, medium and long term interventions to enhance The Stow through public realm improvements and refurbishment programmes.

Emerging Policy

- 2.35 Harlow Council undertook initial consultation on a Core Strategy Issues and Options document, which set out the key issues affecting Harlow and potential options for planning the town's future, between November 2010 and January 2011. Following this an 'Emerging Strategy and Further Options' document was published in April 2014.

Emerging Strategy and Further Options (April 2014)

- 2.36 The new Harlow Local Development Plan will replace the existing Adopted Replacement Harlow Local Plan (2006) and will set out the framework to guide and shape development in Harlow to 2031. This study forms part of the evidence base for the Council's new Local Development Plan. The Emerging Strategy and Further Options Document, (ESFOD), has developed a vision for Harlow 2031 which includes 'securing the status of the town as a prime business location and retail destination'.
- 2.37 To achieve this goal, the ESFOD highlights in Paragraph 2.20 the need for revitalisation of the town centre, neighbourhood centres and many of the town's Hatches to address the quality of the retail offer and the physical environment which has become out dated.
- 2.38 The document reinforces the importance for Harlow town centre to remain a key centre which serves West Essex, East Hertfordshire and further afield. Paragraph 4.16 identifies the regeneration of the Town Centre as a key priority to address the successful functioning of the Harlow as a 'key urban centre'.
- 2.39 A number of development scenarios have been assessed (paragraph 4.18) to inform the future growth strategy in Harlow. Two options have been highlighted which will meet both the retail requirements of Harlow and the Council's objectives. One option would see an increase in dwellings over the next twenty years and substantial regeneration to provide approximately 9,730 sq. m (convenience) and 21,888 sq. m (comparison) retail floor space, while the other option represents a complete transformation of the role of Harlow into a town functioning on a similar level to 'current

day Cambridge'. The figures identified above were informed by previous retail evidence base studies undertaken on behalf of the Council; this study updates these capacity figures.

Local Plan Evidence Base

- 2.40 The Council have previously instructed a number of retail capacity evidence base studies to inform its local planning documents, and all studies undertaken since 2007 have been prepared by GVA. Below, we provide a key summary of these documents in order to help provide context to the remainder of the study — it should be remembered that the outputs of these studies in terms of the quantitative 'need' forecasts will be updated by the findings of this study.

Harlow Retail Study and Health Check (July 2007)

- 2.41 GVA was instructed by Harlow District Council in 2007 to undertake a District-wide Retail Study and Town Centre Health Check ('the 2007 Study'). Harlow town centre and the retail warehouse parks in the town were found to have strong sales densities and were trading well at the time.

Harlow Retail Study Update (November 2010)

- 2.42 GVA were subsequently commissioned in 2010 to produce an update to the 2007 Study to inform retail planning in the District during the period up to 2031. The 2010 Update included a new household telephone survey of shopping patterns, and we make reference to the findings of this during the course of this report.
- 2.43 The 2007 Study involved a detailed assessment of retail and other town centre uses across the District. Given that very little had changed in the five neighbourhood centres and 18 hatches subsequent to the previous publication, the 2010 Update does not include these centres in its assessment: only the role and function of Harlow town centre and opportunities for the future are considered.
- 2.44 The 2010 Update identified an oversupply of convenience goods floorspace over the short-term (to 2015) with incremental additional capacity (1,800 sq. m to 2,100 sq.m¹ net) arising in the period between 2020 and 2031. The study recommends provision of a new foodstore in Town Centre North to anchor the area and to encourage regeneration of this part of the town centre. Further to this, the report states the need for redistribution of expenditure back to the town centre to address leakage of expenditure to out-of-centre foodstores, particularly the Sainsbury's on Allende Avenue. The report identifies the Asda located in the town centre to be trading well and therefore the addition of another supermarket would not materially affect the Asda store. Subsequent to the completion of the 2010 Update there has been no progression of the regeneration of Town Centre North, and, as our 'health check' of Harlow town centre (Section 5) identifies, there is a continued need for regeneration of this part of Harlow town centre.
- 2.45 Regarding the 'need' for comparison goods floorspace, the 2010 Update identified a 'baseline' capacity to support 4,700 sq. m net additional comparison goods floorspace by 2015, increasing to 79,000 sq.m net by 2031. The study recognises that an extant planning permission for an extension to Harvey Centre in Harlow town centre would absorb some of this capacity, reducing the overall comparison goods 'need' to 72,400 sq.m net by 2031.
- 2.46 Further to this assessment, the study suggests the potential for additional capacity generated solely by new housing development at 2020. This analysis identifies potential capacity above that already identified for between 2,100 to 6,700 sq. m net convenience goods floorspace (assuming a major store operator) and 6,800 to 21,900 sq. m (net) comparison goods floorspace.
- 2.47 The study suggests that the town centre benefits from a good range of multiple and independent retailers, exhibiting increased representation from multiple retailers since the 2007 Study. On a sub-regional level, the study deems Harlow to be performing 'relatively competitively' against other centres and better-performing centres have little influence over the shopping patterns in the District. The study concludes that planned growth is essential to reduce the likelihood of leakage of trade and loss of market share to competing centres.
- 2.48 The imbalance in performance between the north and south of Harlow town centre is highlighted by the study and emphasis is placed upon the need for regeneration in the north to tackle the poorer quality environment and level of vacant outlets. Finally, the study states that Town Centre North would benefit from strategic allocation within the Core Strategy or an allocation within an APP.

¹ Capacity figures in this section are rounded for ease of reference.

Harlow Retail Study Update Addendum (October 2011)

- 2.49 The 2010 Update presented retail capacity forecasts based on a household survey (June 2010) which had underestimated performance of convenience stores in Harlow town centre. Additionally the level of in-flow of expenditure (i.e. expenditure generated by individuals living outside the survey area) was not factored into the capacity forecasts.
- 2.50 To address this, GVA were commissioned in August 2011 to undertake an in-centre survey to establish the percentage in-flow of shoppers travelling to Harlow centre from beyond the survey area and accordingly, produced revised capacity forecasts for convenience and comparison goods taking into account this inflow. Two sets of forecasts were provided; a 'baseline' set which do not take into account any changes to the original input assumptions and a second set which reflect the most up-to-date economic situation.
- 2.51 The report indicates that after taking into account an estimated inflow of 14% to Harlow town centre, the revised baseline forecasts identify a marginally greater level of convenience goods capacity (between 900 and 2,300 sq.m net by 2020) over the short to medium term based on a constant market share of convenience goods. Over the longer term to 2031, the 'need' for new convenience goods floorspace increased to between 2,700 and 6,800 sq.m net by 2031, over the long term. The study continues to recommend the development of an additional large-format foodstore in Town Centre North.
- 2.52 In terms of comparison goods, taking into account the in-flow of expenditure, baseline forecasts identify greater global capacity to support additional comparison goods floorspace across the District over the plan period. The updated comparison goods capacity forecasts identify a 'need' of between 78,400 and 85,000 sq.m net by 2031. However, when updated economic forecasts are taken into account, this 'need' decreases to between 58,300 and 65,000 sq. m net for 2031.

Harlow Retail Frontages Study (Harlow Council, 2016)

- 2.53 Harlow Council produces an assessment of retail frontages in Harlow town centre, the neighbourhood centres and hatches, to provide an assessment of year-on-year change of the composition of their centres. Along with this study, the evidence from the Harlow Retail Frontages Study (RFS) supports the evidence base for formulating retail policies in the new Local Development Plan.
- 2.54 In terms of Harlow town centre, the RFS notes that A1 frontage has reduced from the 2013 study from 75% to 70% and vacant frontage from 8% to 3%. Once the developments within the Harvey Centre are complete, the proportion of A1 town centre primary frontage could return frontage levels to those recorded during the early 2000's. The RFS also states that secondary frontages were heavily hit by the recession, it would appear that there has been a slow recovery in terms of vacant frontages, although the recovery is starting to falter. These findings support our own analysis of the current performance of secondary areas in Harlow town centre, which we discuss in more detail in Section 5.
- 2.55 The RFS identifies that neighbourhood centre frontages have consistently performed well, even during the recession of the late 2000's. The predominant frontage use is generally A1, although there are significant frontage lengths in A2 and A3 use, as well as lower amounts of frontage in other uses. Similarly, the hatches have also consistently performed well, maintaining very low vacancy rates. The proportions of frontages have also remained constant, with around half being in A1 use, with significant amounts of A2, A3, and A5 uses. Again, this supports our own analysis of the performance of the neighbourhood centres (also set out in Section 5) which indicates that, for the most part, these centres are currently performing well.
- 2.56 In terms of the changes to permitted development rights there has, to date, been little impact on town centre primary frontages, with few changes of use recorded. The study also looked at the impact of permitted development rights on secondary frontages and neighbourhood centres, which also found that there has been little impact in terms of loss of frontage.

Summary

The National Planning Policy Framework (NPPF) was adopted in March 2012 and replaces the suite of national Planning Policy Statements, including PPS4. The NPPF maintains the general thrust of PPS4 and advocates a 'town centres first' approach. It requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period.

The Council's Adopted Replacement Local Plan (Saved Policies) dates from 2006 sets out a comprehensive set of policies to guide development in Harlow town centre and the Council's network of neighbourhood centres, including

identification of a number of development opportunities, particularly focused on promoting redevelopment in the Town Centre North area.

The Council is in the early stages of consultation on a new Local Plan for Harlow, which will replace the 2006 Plan. This study will form part of the evidence base to the new Local Plan, including updating the retail capacity forecasts which the Council will need to plan for.

3 STUDY CONTEXT

In this section we set out a summary of current national trends in respect of the retail and commercial leisure sectors, which can have implications for future growth of centres and demand for new retail floorspace. As part of our assessment, we consider the potential implications of these trends on centres in Harlow.

A return to growth, but a slowing recovery

3.1 Analysis published by Experian identified that following several years of subdued performance, including the period of recession; a ‘strong economic upswing’ subsequently took place, driven by increases in consumer spending and business investment.

3.2 In their Retail Planner Briefing Note (November 2016), Experian comment that the pace of economic growth has lessened since 2014 and this is likely to continue in the short term:

‘The UK recovery has continued into 2016. However, there has been some moderation to the pace of upswing since 2014... the recovery has become increasingly reliant on consumer spending as investment has slowed. The near term outlook has become more uncertain following the UK referendum vote in June 2016 in favour of leaving the EU. While the economy has thus far proved resilient, the vote has created major uncertainties, which are expected to take a toll on business sentiment, investment and hiring plans over the coming year’.

3.3 In terms of terms of future projections of consumer spending, Experian’s outlook is noticeably cautious, stating that:

‘We expect consumer spending to begin to weaken over 2017, suffering from higher inflation in the wake of the steep fall in the sterling’s exchange rate since the referendum. Wage growth remains modest and is likely to be overtaken by higher inflation, which in turn will constrain spending power’.

3.4 Experian conclude that ‘the outlook for the next two years for the UK economy has weakened significantly following the Brexit vote’. In the medium term, Experian consider that ‘the repercussions of the recession and the implications of the EU referendum vote are set to hamper economic progress for a few years. Much will depend on the outcome of trade negotiations and terminating involvement with the EU. These negotiations could take several years to conclude, and in the meantime, uncertainty over the final deal is expected to constrain business confidence and investment plans’. Experian forecast a return to somewhat stronger levels of growth, particularly in terms of opening on non-food goods, from 2019.

3.5 There has therefore been a return in confidence to consumer spending in recent years, which offers potential for strongly-performing town centres to capitalise on, although the most recent guidance from Experian suggests that this recent return to confidence is now being challenged by the uncertainty arising from the referendum vote in June 2016 — as well as other changes in the retail sector which we discuss below.

Changing Retailer Space Requirements

3.6 During the recession retailers’ margins were squeezed, whilst other costs have continued to rise and a raft of multiple and independent retailers have either collapsed or significantly shrunk their store portfolios in recent years. The growth of the internet means that retailers no longer need stores in every town to achieve national coverage, and many are therefore focusing their development programmes on the provision of large flagship stores in strategic locations, supported by smaller satellite stores and transactional websites. Many operators are continuing to close stores in less-profitable, smaller locations as leases expire.

3.7 The larger flagships accommodate full product ranges whilst smaller stores offer more select ranges, supplemented by internet kiosks allowing access to the full range. This offers many advantages to retailers including lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions. This ‘polarisation’ of retailing is enabling larger dominant centres to continue to attract key flagship formats. This can pose a particular challenge to smaller and medium-sized centres, where there are higher order centres in close proximity.

3.8 An often inevitable consequence is that smaller and medium-sized centres become home to more, value-orientated retailers – Poundland, Wilko, Primark and so on – who are more reluctant to pay the rental costs associated with higher-order centres, and, much in the same way that Woolworths previously did, are developing a comprehensive network

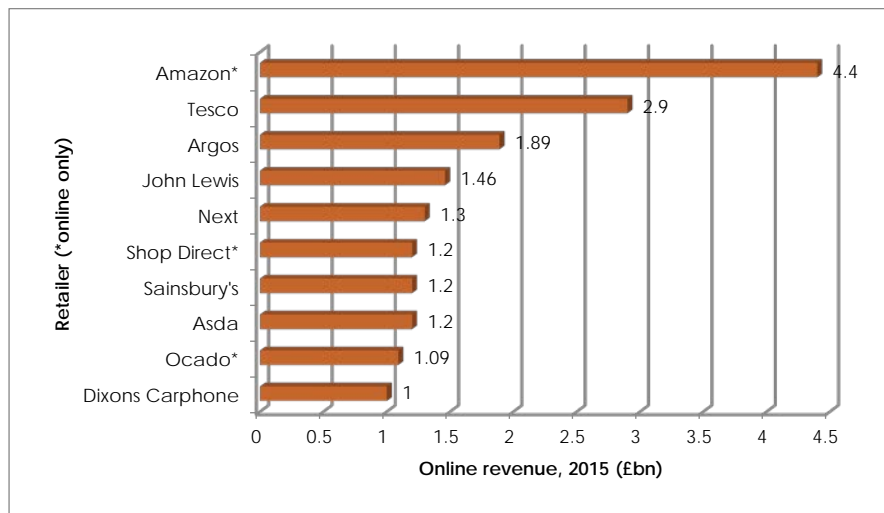
of coverage in smaller towns, often by being able to acquire prime retail sites at relatively competitive rates. Harlow town centre in some ways encapsulates this trend — the centre has a strong representation from the more value-orientated retailers, and some more ‘mainstream’ operators such as Marks & Spencer no longer have a trading requirement in the town centre.

- 3.9 The exception to the above trend is smaller centres which have an existing upmarket / specialist retail offer which was less affected by the economic downturn, and therefore fewer opportunities for value retailers to take space have materialised. This has enables centres such as St Albans, Marlow, Henley-on-Thames, Horsham, Sevenoaks and Farnham, to continue to perform strongly throughout the economic downturn, by offering a curated, specialist retail offer often centred around an upmarket clothing, homewares, and casual dining offer. Typically these centres also offer a strong historical setting and environmental quality which increases their attractiveness as ‘destinations’ (a point we discuss further below).

Internet Growth & Multichannel Retailing

- 3.10 The online shopping population is reaching saturation, and any future growth in the market is likely to come from increased spend driven by new technology, a better ‘browsing’ experience and improved delivery options. The growth in online sales has previously raised concerns about the continued need for bricks and mortar stores; however trends indicate that online and in-store shopping channels are becoming increasingly blurred.
- 3.11 The ‘Click and Collect’ market is the largest on-line growth sector in the UK at the current time. It is forecast to be one of the most significant drivers of growth, with expenditure set to grow by 82% between 2014 and 2019 to £6.5bn (Verdict 2014). Verdict comment that ‘the importance of click & collect should not be underestimated. Maintaining a store network that can offer locality, whilst also having highly informative websites to drive growth, is now a fundamental requirement’. It can be used as an important tool in helping town centres to continue to have an important role and function, by being a footfall generator in its own right.
- 3.12 Many national retailers who are trading in Harlow town centre now operate ‘Click & Collect’ facilities, with examples including Argos, Sainsbury’s, Tesco, Boots and Next. It is noteworthy that of the top ten online retailers in 2015, seven have a physical presence on the UK High Street, and all of these offer ‘Click & Collect’ facilities (Figure 3.1). Of these seven, four are currently trading in Harlow town centre (Tesco, Argos, Asda and Dixons Carphone) and Sainsbury’s and Next both also have a trading presence elsewhere in the town. Despite being a relatively new concept for the retail sector to embrace, click & collect is therefore affirming that physical stores can continue to have a role in the multichannel shopping environment. The advantages of physical stores, in terms of the shopping experience, service and immediacy of products in a showroom setting, will ensure that a network of key stores remains a fundamental component of retailer’s strategies to provide an integrated multichannel retail proposition. Increasingly, local shops and newsagents are also offering ‘Click & Collect’ facilities, using networks such as CollectPlus, which partners with brands such as ASOS, John Lewis and House of Fraser to deliver online orders to a network of 6,000 local shops across the country, and convenience stores operated by Nisa, Spar and Costcutter.

Figure 3.1: Top ten UK retailers by online revenue, 2015



Source: Retail Week/Prospect, January 2016. *denotes online only stores. Note: John Lewis also have Click & Collect facilities available via Waitrose stores

The role of the town centre

- 3.13 The town centre has been the main shopping channel for centuries, but in the face of new forms of e-tailing (i.e. online shopping) and m-tailing (shopping through mobile phones, tablets and so on) competition many centres will need to continue to adapt in order to remain viable shopping destinations. Across the UK, footfall decreased in High Street locations during the final quarter of 2015², emphasising the need for centres to offer a broad range of uses as possible to assist in driving footfall. Many centres are increasingly positioning themselves as being locations for leisure and social activities as well as traditional retailing, with more bars, restaurants, food outlets and community spaces.
- 3.14 Our health check assessment of Harlow town centre confirms that there remains an under-provision of these type of uses in Harlow town centre, which means that footfall, particularly outside of retail trading hours, is not as strong as it could potentially be. The planned improvements to the Harvey Centre (as mentioned in the previous section) will go some way to addressing some of the qualitative deficiencies in the leisure offer of the town centre; we discuss this further in the following sections of this report.
- 3.15 Centres which offer unique/specialist retail offer which cannot be matched online are also likely to continue to perform strongly. Enhancing the non-retail offer so town and district centres function as more than just retail locations will help drive footfall and increase dwell time. It is increasingly important for centres to promote unique attractions such as heritage assets, historic buildings and cultural features which can differentiate a centre and improve its attractiveness — Harlow's nature as New Town means it does not offer a 'traditionally' attractive town centre, but the presence of the extensive number of listed sculptures throughout the town centre (and wider urban area) is a unique selling point few other locations can capitalise on. The branding of Harlow as 'Harlow Sculpture Town' from 2009 onwards represents an important example of how place marketing can be used to raise the image and profile of a location.
- 3.16 To ensure that town and district centres have a viable function moving forwards they must provide an attractive shopping and leisure experience which the internet is unable to match. A wider strategy must deliver a mix of town centre uses to enhance the attraction of a centre, and increase frequency of visit and dwell time. A vital component of this will be making town centres as accessible as possible, with improved and affordable car parking, as well as investment in public realm and place marketing initiatives.



The convenience sector

- 3.17 The convenience goods market has witnessed a fundamental change in shopping patterns in recent years, as people increasingly prefer to shop more frequently in smaller-format 'convenience' stores such as Sainsbury's Local, Tesco Express, Co-Operative, Marks & Spencer Simply Food and Little Waitrose. The main foodstores (i.e. the 'big four' – Asda, Morrisons, Sainsbury's and Tesco) have responded to these changes by reigning in substantial expansion of their estates, particularly in terms of larger-format superstores. Both Tesco and Morrisons announced a closure programme of underperforming stores in 2015, and further store closures were announced by Morrisons in 2016, although we are not aware of any foodstores in Harlow which have been affected by these scaling back of operations.
- 3.18 The combined spread of convenience store openings, online grocery sales, and the expansion of 'deep discount' retailers such as Aldi and Lidl has fundamentally changed consumer shopping behaviour. Both Aldi and Lidl have gained market share for a number of consecutive years, largely at the expense of the 'big four', and both Aldi and Lidl are pursuing ambitious development programmes of opening new stores as well as refurbishing older stores. There has also been growth at the 'premium' end of the convenience goods market, with both Waitrose and M&S Food growing store numbers (although neither operator is currently represented in Harlow, following the closure of the Marks & Spencer store in Harlow town centre last year)

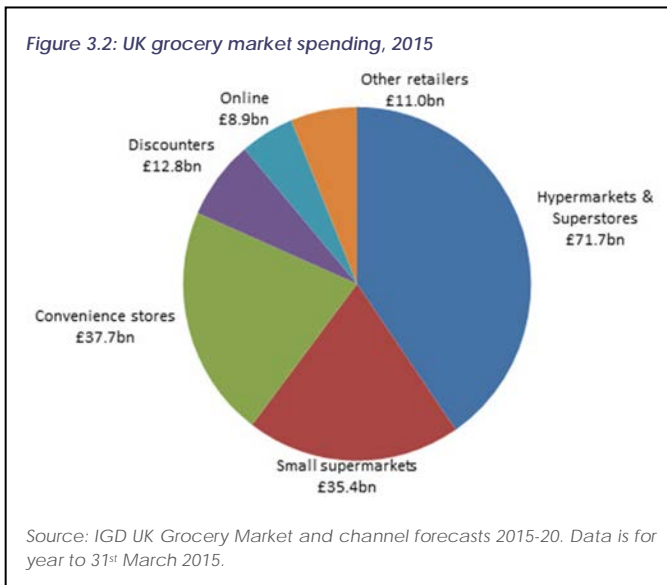
² Source: British Retail Consortium, January 2016



Asda store in Harlow town centre

3.19 The chart below (Figure 3.2) shows the composition of the convenience goods sector in 2015, based on data collected by The Institute of Grocery Distribution (IGD). IGD estimate that the UK grocery market was worth £177.5bn in 2015, and of this ‘convenience stores’ (defined by IGD as stores under 3,000 sq.ft net) claiming £37.7bn of this (21.2%). However, as Figure 3.2 shows, notwithstanding the unquestionable growth in the popularity of ‘convenience’ stores, most of the food shopping spend is still accounted for by larger-format stores — £71.7bn was spent in ‘hypermarkets and superstores’ (stores over 25,000 sq.ft net), and a further £35.4bn in ‘small supermarkets’ (stores between 3,000 and 25,000 sq.ft net).

3.20 There is still therefore clearly a role for the larger-format store to play in convenience goods shopping, and indeed these remain the principle format of convenience goods shopping for the District, but more widely speaking operators are opening smaller format stores than was the case at the time of the Council’s previous evidence base studies. Operators with ‘hyper-market’ format stores (over 60,000 sq.ft net) are seeking to introduce concessions or sub-lets to make better use of excess space. For example, some branches of Sainsbury’s are trialling Argos concessions, and branches of Tesco Extra include either concessions from other Tesco-owned brands, or other fashion retailers.



3.21 These examples confirm that there remains appetite from foodstore operators to open new stores where suitable opportunities arise, although the size of foodstores being committed to is generally less than has previously been the case. We expect the ‘big four’ retailers to be significantly more selective in committing to new sites, and to instead focus on programmes of enhancements and upgrades to their existing store network where this is considered to be needed.

Out-of-Centre Retailing

- 3.22 Retailers are opting to develop stores in the most strategic and cost effective locations, with a notable resurgence of out-of-centre destinations, which offer the benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict, out-of-town retailing is the only form of retailing which has seen store numbers increase consistently since 2000. The Department for Business, Innovation and Skills (BIS³) reports that the number of out-of-centre stores has increased by up to c.1,800 (25%) since 2000; whilst the number of town centre stores fell by almost 15,000 between 2000 and 2009, the majority of which are likely to have been in 'high street' locations.
- 3.23 The recovery of market confidence which has taken place since 2013 is benefitting out-of-town retailing. Vacancy rates have fallen, footfall has increased, and many retailers are seeking expansion in out-of-centre locations. A number of these are traditional town centre retailers which have developed out-of-town store formats, including John Lewis, which now operates a number of 'At Home' stores in prominent out-of-centre locations, as well as other traditionally 'high street'-focussed retailers such as Debenhams, Next, Primark and H&M. As identified in the previous section, there is a considerable concentration of out-of-centre retail warehousing along Edinburgh Way, to the north of the Harlow urban area, set around a number of retail parks and standalone out-of-centre retail stores. Whilst many of the stores are 'bulky goods' in nature, there are several examples of units being occupied by 'high street' retailers, and these can be expected to compete with operators in Harlow town centre for comparison goods spending. There are other concentrations of similar facilities in locations surrounding the District, for example Brookfield Shopping Park at Cheshunt, a 'high street' format retail park which includes large branches of outlets such as Boots, Next, Argos and River Island. As we set out in the following section, There are proposals for enhancements to the retail and commercial leisure offer at Brookfield which would, if approved, come forward over the course of the Council's new Local Plan period.
- 3.24 Indeed the role and nature of Brookfield reflects a wider trend which has, in recent years, seen the evolution of traditional retail 'box' warehouse developments into retail parks, sub-dividing units, expanding the product offer, and developing beyond just retail to introduce food and beverage, encouraging longer dwell times. The retail warehousing development at Edinburgh Way includes a Costa Coffee and fast food restaurants (e.g. McDonalds, KFC and Pizza Hut), plus ancillary café facilities in facilities such as Cineworld, but beyond this the food and beverage offer has, to date, remained limited. Retail park owners are also refurbishing their retail parks; i.e. public realm, walkways, car parks, signage, landscaping and seating to enhance the visitor experience.

Commercial Leisure

- 3.25 As the nature of retail and high-street shopping continues to change over time, the commercial leisure sector is becoming an increasingly important contributor to the vitality and viability of town centres. Leisure time is a precious commodity to consumers and in order to maximise free time, research suggests that town centre visitors often combine leisure activities as part of an overall going out experience. Reflecting this trend, leisure is becoming an increasingly important component in town centre regeneration schemes, particularly in secondary towns which, reflecting the wider trends in the retail sector previously identified, are in some cases becoming less attractive as retail destinations.
- 3.26 The recession brought mixed fortunes for the restaurant sector. The main casualties were from the more exclusive end of the market, as well as smaller companies with less established brands. Many companies owning multiple brands expanded throughout the economic downturn and continue to trade well, often by offering heavy promotions and discounts. In recent years, expansion in the restaurant sector has been driven by 'casual dining' operators such as Byron, Giraffe, GBK, Wagamama, Carluccios, Pizza Express and so on – although as mentioned above, Harlow town centre has not yet attracted a significant number of these operators (although there are small number of units given over in the Water Gardens to these uses).
- 3.27 The coffee shop sector remains buoyant; there are now approximately 16,500 coffee shops across the country. Recent analysis shows that the UK's coffee shop sector remains one of the most successful in the nation's economy and will continue to expand. Operators such as Costa are now a High Street staple whilst the independent coffee shop sector is also growing store numbers, albeit more slowly outside of London.
- 3.28 The pub industry suffered during the recession with a record number of pub closures across the UK as a direct consequence of a decline in both drinks sales and rental revenues. This decline continues today, at a rate of approximately 30 pub closures per week across the country. Many pubs have in recent years been converted to small-format convenience stores. Additional factors such as competition from supermarkets, changes to licensing

³ The Department for Business, Innovation and Skills (BIS) has subsequently merged with the Department of Energy & Climate Change (DECC) to form the new Department for Business, Energy and Industrial Strategy (BEIS).

legislation and the smoking ban have further compounded the problems faced by many operators. Similar to the foodstores, however, value led brands such as JD Wetherspoon have achieved sales growth in recent years and continue to expand. In London, the popularity of specialist pubs offering craft beers and local ales also remains strong, and this is a trend which is now becoming popular in other urban areas.

- 3.29 The health and fitness sector continues to perform strongly as the social trend involving the maintenance of personal health and fitness shows no sign of abating. The health and fitness market is currently being expanded through investment by value and budget operators such as Easy Gym, Gymbox and Pure Gym (the latter of whom operate a facility at the Water Gardens in Harlow town centre). This new breed of venues aims to appeal to a wider market with flexible, low cost monthly or 'pay as you go' subscriptions. These facilities are usually located in high-footfall, in or edge of centre locations, often as part of a wider leisure offer.
- 3.30 The cinema market is also continuing to perform strongly, and in recent years has overtaken foodstores as a typical 'anchor' to new town centre development schemes. As of June 2016, there are 316 cinema multiplexes operational in the UK.
- 3.31 Both major cinema operators (e.g. Cineworld, Odeon) and smaller/independent operators (e.g. Curzon, Everyman) continue to open new developments — and importantly, cinema operators are willing to consider openings in smaller town centres, particularly when a development can also incorporate complementary 'family dining' restaurants such as Nando's, Pizza Express and so on, as well as coffee shops, enabling them to act as leisure 'destinations' in their own right. For example, Cineworld has opened eight new sites since 2015, including in market towns such as Loughborough and Hinckley; Odeon has opened fewer new sites (six since 2012) but also continues to open in smaller centres, such as Llanelli and Trowbridge.
- 3.32 Currently, the only cinema in Harlow is an out-of-town Cineworld multiplex on Edinburgh Way. Cineworld are shortly to enhance their presence in Harlow by also anchoring a new six-screen IMAX cinema which is being constructed in Harlow town centre as part of an extension to the Harvey Centre. Reflecting the trends described above, the development will also introduce a number of new restaurant operators into the town centre. The development is expected to open at the end of 2016.

Summary

The 'traditional' high street continues to face a number of challenges stemming from the impacts of the recent economic downturn, the tightening of retail spending in recent years, and continued significant changes in consumer shopping behaviour. The growth in online shopping, including multi-channel retailing, acts as tough competition for the high street, but also presents an opportunity for the high street to capitalise, by maximising the opportunities arising from services like 'click & collect', and retailers moving towards a seamless transition between store-based and virtual shopping experiences.

Out-of-centre retailing remains an ever-present source of competition, and market evidence suggests that many retail parks have performed well during the economic downturn, and are becoming increasingly attractive to 'high street' retailers. Portfolio aspiration is generally to increase footfall through a greater product offer and mix of uses to encourage footfall and longer dwell times. Harlow has a considerable amount of retail warehousing in the Edinburgh Way area which can be expected to compete with the town centre for expenditure, particularly as some of the retail offer is open A1 and therefore includes 'high street' operators. Outside of Harlow, facilities such as Brookfield, in Cheshunt, are established out-of-centre shopping destinations which provide further competition for spending. There are proposals for enhancements to the retail and commercial leisure offer at Brookfield which would, if approved, come forward over the course of the Council's new Local Plan period.

Town centre strategies which support the continued evolution of the high street are therefore considered ever more vital. This may involve providing a high quality shopping 'experience', maximising the benefits of tourist trade, and improving the mix of retail and non-retail outlets to increase length of stay and spend. Improvement of commercial leisure provision (both in terms of daytime uses such as cafes and evening uses such as cinemas, bars and restaurants) is a major opportunity which many town centres have embraced, as it increases dwell time, promotes 'linked trips' spending, and can increase the 'trading hours' of the town centre beyond those typically associated with retailers.

It will be important, therefore, for town centres to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the development plan period and to reaffirm their unique selling points which differentiate their retail offer from other centres, allowing them to differentiate themselves from – rather than directly compete with – higher order centres. Heritage, tourism assets and other 'unique selling points' should be capitalised on, and robust place marketing strategies put in place.

4 THE SUB-REGIONAL CONTEXT

In this section, we set out the sub-regional context within the centres in Harlow District operate. This is an important consideration as patterns of retail and leisure visits are not 'closed' systems, and residents are often prepared to travel longer distances, particularly for comparison goods shopping and leisure visits. It is therefore natural to expect a degree of expenditure loss to the network of centres in the surrounding area; this is simply part of the retail hierarchy of an area.

4.1 In order to establish where residents in the District are currently undertaking their shopping and leisure visits, a household telephone survey of shopping patterns was undertaken in support of this study. Further details of this, including the definition of the 'survey area' which has formed the basis of our assessment, is provided in Section 6. To summarise, the household survey identified that Harlow town centre is the most popular destination for comparison goods shopping in the survey area, drawing a comparison goods turnover of £304.2m. A further £224.2m is spent at retail parks/retail warehousing in Harlow, indicating that these are also a highly popular comparison goods shopping location. The household survey identified that the following destinations represent the key competitors for Harlow, in respect of comparison goods spending⁴:

- **Bishop's Stortford** (claims £168.7m / 10.7% of comparison goods spending available to the survey area)
- **Brookfield, Cheshunt** (claims £105.6m / 8.0% of comparison goods spending available to the survey area)
- **Welwyn Garden City** (claims £55.8m / 4.2% of comparison goods spending available to the survey area)
- **Herford** (claims £37.1m / 2.8% of comparison goods spending available to the survey area)
- **Lakeside** (claims £36.2m / 2.7% of comparison goods spending available to the survey area)
- **Chelmsford** (claims £33.7m / 2.5% of comparison goods spending available to the survey area)
- **Epping** (claims £31.4m / 2.4% of comparison goods spending available to the survey area)
- **Central London** (claims £30.9m / 2.3% of comparison goods spending available to the survey area)
- **Hoddesdon** (claims £27.9m / 2.1% of comparison goods spending available to the survey area)
- **Cambridge** (claims £25.9m / 2.0% of comparison goods spending available to the survey area)

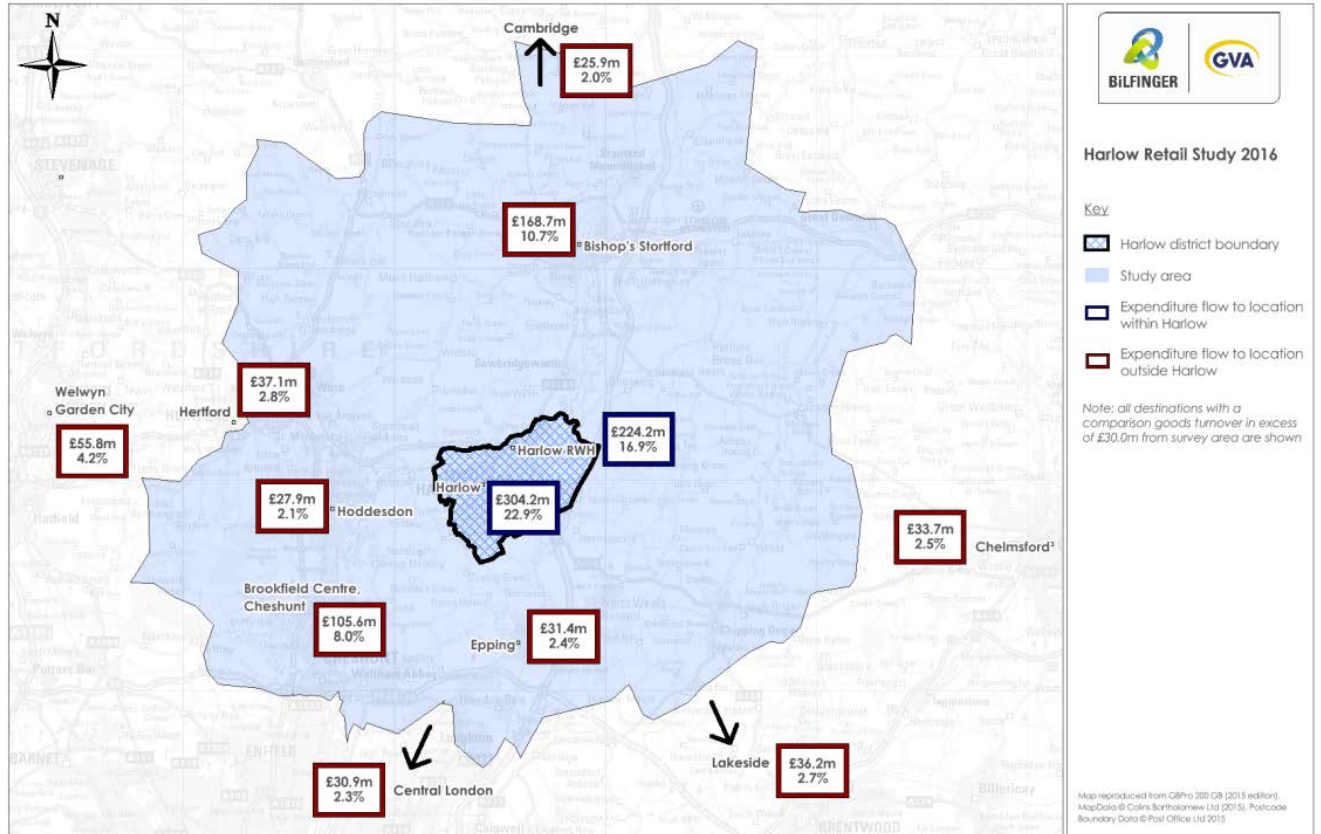
4.2 The above-listed centres are all of those which draw more than 2.0% of comparison goods spending available to the survey area. A number of other destinations also draw more limited amounts of spending — for example Stevenage (£21.6m) and Ware (£20.2m).

4.3 A major change in the shopping provision which has occurred since the Council's previous retail evidence base study is the opening of the Westfield Stratford City development in east London, but the survey evidence indicates that this only has delivered a relatively limited impact on shopping patterns of residents in the survey area; in total, Westfield Stratford City draws just £17.2m of comparison goods spending from the survey area, and of this approximately £3.1m is derived from residents in Harlow.

4.4 **Figure 4.1** summarises the comparison goods spend drawn to the key competing locations listed above. Plans of the catchment areas of all the above-listed competing centres, showing from where in the District they draw their trade, are provided in Volume 2 to the study.

⁴ All destinations which claim over 2.0% of comparison goods spend are listed.

Figure 4.1: Comparison goods turnover of key competing centres



Source: Table 5, Appendix I. A larger version of this plan is reproduced in Volume 2.

Bishop's Stortford

Venuescore Retail Ranking (2014): 221 | Comparison goods trade draw from survey area: £168.7m

- 4.5 Bishop's Stortford is located in East Hertfordshire district and it is identified as a minor sub-regional centre in the East Herts 'saved' Local Plan (2007). Bishop's Stortford offers 66,100 sq. m total retail floorspace across 298 shopping outlets according to Experian Goad.
- 4.6 Bishop's Stortford has a strong comparison retail offer, ranking above the national average, and a good convenience offer. There is a good representation from national retailers which are predominantly positioned along Potter and South Street and located within the Jackson Square Shopping Centre, a 1970s style shopping mall accommodating over 45 units. Multi-chain retailers in the primary shopping frontages include White Stuff, Jojo Mama Bebe, Boots, Shoe Zone, WH Smith, Waterstones, Crew Clothing, Clintons Cards, Marks & Spencer and Edinburgh Woollen Mill. Jackson Square Shopping Centre hosts Wilko, Next, New Look, Sports Direct, Accessorize, Superdrug, and Game. Womenswear dominates the comparison shopping retail offer and there are also a noticeable number of charity shops. The town centre offers a good range of cafes and restaurants including Prezzo, Carluccio's, Chimichanga, Starbucks, Costa and a variety of local independent establishments. Other leisure uses include the multi-screen Empire Cinema and Nuffield Fitness Centre on Anchor Street.
- 4.7 In terms of convenience offer, the town centre is anchored by a Waitrose supermarket (circa. 1,760 sq. m net) and a Sainsbury's supermarket (circa. 4,780 sq. m net).

Planned Development

- 4.8 Solum Regeneration in partnership with Abellio Greater Anglia, have submitted a planning application to East Hertfordshire District Council to redevelop the Goods Yard site around Bishop's Stortford station. The scheme will deliver a modern transport hub in addition to new homes, a hotel and waterside park. A retail and leisure scheme proposed for the land at Old River Lane was granted outline permission in January 2013. The scheme proposes a maximum of 16,000 sq. m of retail floorspace and includes a new department store, extended Waitrose store and 35 retail units, in addition to 100 residential units and a new cinema. However, it is understood this scheme is no longer proceeding.

Brookfield, Cheshunt

Venuescore Retail Ranking (2014): 659 | Comparison goods trade draw from survey area: £105.6m

- 4.9 Brookfield is an out-of-town shopping location located within the Borough of Broxbourne, situated just off the B156. The location comprises the Brookfield Centre — a development which is occupied by a large branch of Marks & Spencer and a 6,400 sq.m Tesco Extra store. The adjacent Brookfield Retail Park is a fashion-led retail park which comprises branches of Next, Outfit, River Island, New Look and Clarks, plus branches of Argos and Boots.

Planned Development

- 4.10 Plans have been presented for a flagship housing, shopping and leisure development project (known as 'Brookfield Riverside'). The proposals are for a mixed use development which will deliver 1,500 new dwellings, up to 47,000 sq.m of new office and civic floorspace (including new offices for Broxbourne Council), and a 'mixed use town centre development' to include:
- Up to 35,000 sq.m net retail floorspace (covering class A1, A3, A4 and A5 floorspace)
 - Up to 10,000 sq.m of commercial leisure floorspace, including a cinema and health and fitness club
 - Community facilities
 - Hotel; and
 - Public transport hub
- 4.11 It is recommended that the Council monitors progress of developments at Brookfield Riverside to ensure that the type and scale of development proposed would not result in additional market share being drawn from residents in Harlow District.

Welwyn Garden City

Venuescore Retail Ranking (2014): 157 | Comparison goods trade draw from survey area: £55.8m

- 4.12 Welwyn Garden City is located within the Borough of Welwyn Hatfield and offers 51,180 sq. m total retail floorspace across 180 retail outlets. In terms of comparison retail shopping the town centre is anchored by a John Lewis store, which is a key attractor few other centres in the surrounding area are able to offer (although a new John Lewis store opened in Chelmsford in 2016). Other major retail tenants present in the town centre include Debenhams, New Look, Next, Topshop and Marks & Spencer. The majority of national retailers are situated within the Howard Centre, which opened in 1990 and offers approximately 21,000 sq.m of retail floorspace. Across the remainder of the town centre there are a number of charity shops and a strong presence of financial and retail service shopping outlets. The eating and drinking offer falls below the national average and is limited, but examples of operators trading in the centre include Prezzo, Bill's and Costa.
- 4.13 A Waitrose store anchors the convenience offer to the north of the town centre and a Sainsbury's supermarket and Iceland store are located in the southern portion of the town centre.

Hertford

Venuescore Retail Ranking (2014): 388 | Comparison goods trade draw from survey area: £37.1m

- 4.14 Hertford town centre, within the administrative boundary of East Herts District Council, offers a total retail floorspace of 51,290 sq. m set across 272 retail outlets. The town centre is functioning as a leisure destination, due to the close proximity of Hertford Castle, and is performing well in terms of its offer of restaurants, cafés and pubs including Lock Fyne, Prezzo, Café Rouge, Costa Coffee, Caffè Nero, Pizza Express and a number of independent establishments. The leisure offer of the town centre is further strengthened by the Hertford Theatre and a cinema.
- 4.15 Large comparison shopping retailers present in the town centre are mainly located within the Bircherley Green Shopping Centre and Maidenhead Street. Large branches of Sainsbury's and Tesco sit to the north of the town centre, which also contains a Waitrose store.

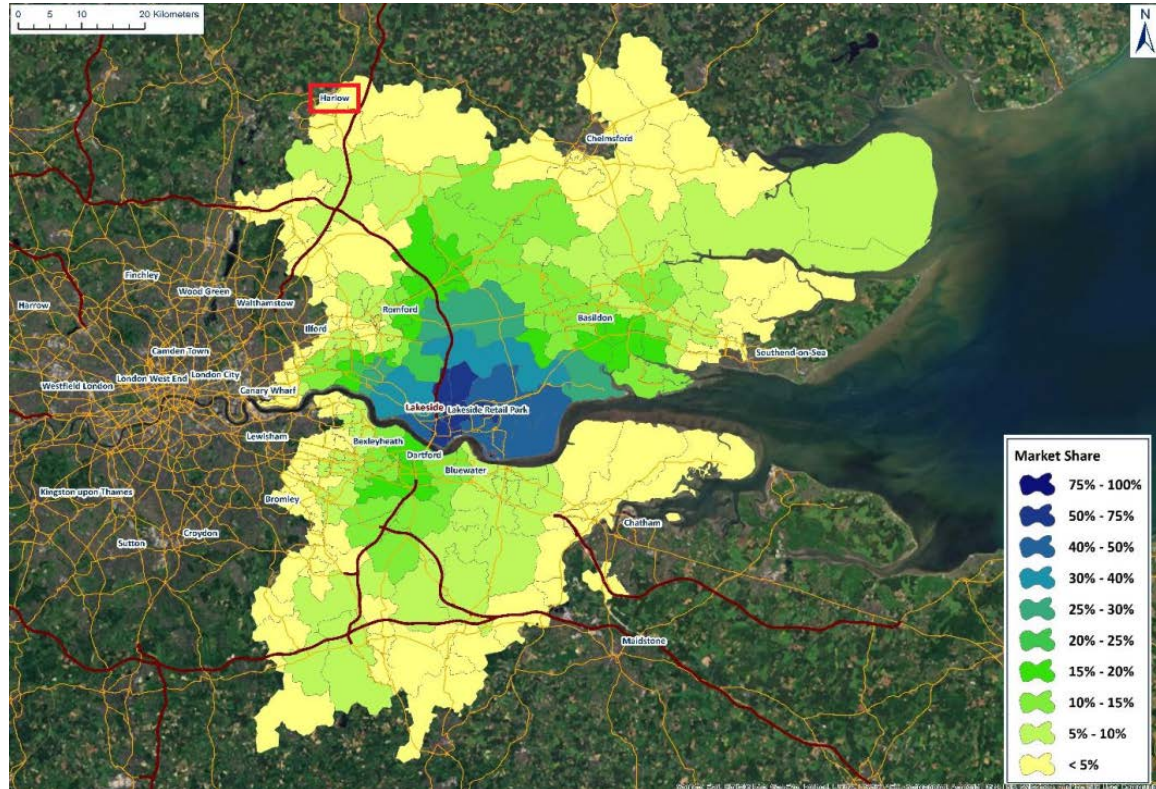
Lakeside

Venuescore Retail Ranking (2014): 52 | Comparison goods trade draw from survey area: £36.2m

Lakeside Shopping Centre

- 4.16 Lakeside Shopping Centre (currently trading as Intu Lakeside) is a large out-of-town shopping centre located in West Thurrock and it is designated as a 'shopping centre and parade' in the Thurrock Core Strategy (2011). The centre is one of the major shopping attractors in the South-East, and pulls trade from a catchment area that extends across much of south Essex, east and south-east London, and parts of north Kent. The plan at **Figure 4.2** shows the extent of Lakeside's catchment as identified in the Harper Dennis Hobbs Retail Centre Reports (2016), and shows that Harlow (highlighted with the red box) sits on the outer periphery of its catchment.

Figure 4.2: Lakeside catchment area



Source: Harper Dennis Hobbs Retail Centre Reports 2016 (Harlow shown highlighted in red box)

- 4.17 Lakeside Shopping Centre opened in 1990, and functions predominantly as a comparison shopping destination, offering 131,800 sq.m of retail floorspace (268 outlets) across three floors. The main anchor stores in the shopping centre are Primark, Marks & Spencer, Debenhams and House of Fraser. The centre has a mixture of typical and more upmarket 'high street' fashion and lifestyle brands (e.g. All Saints, H&M, Levi's, Office, Next, Topshop/Topman, Boss, Lacoste, Apple, Lakeland and Lush). There is representation from restaurants located in the Broadwalk and food court (Giraffe Restaurant, La Tasca, Gourmet Burger, Las Iguanas, Strada, Pizza Express, Café Rouge etc), as well as a good offer of cafes/ coffee shops such as Starbucks and Caffè Nero, alongside a Vue cinema. Car parking facilities comprise 15 car parks with parking capacity for more than 13,000 vehicles.

Lakeside Retail Parks

- 4.18 A cluster of warehouses are located directly adjacent to Lakeside Shopping Centre. Similarly to Lakeside Shopping Centre, the retail park is in an out-of-town location and designated as a 'shopping centre and parade'. The retail offer comprises 'bulky' comparison goods, homeware, variety stores and clothing outlets. Major retailers present across the retail parks include Boots, Nike, Next, Marks & Spencer, Pets at Home, Maplin, B&M and ScS. According to Experian Goad the total retail floorspace is 153,800 sq.m across 89 outlets (including B&Q, Ikea and Costco which are not designated within the shopping boundary on the proposals map). In close proximity to the north of the retail parks there is a Tesco Extra (circa 9,400 sq.m net) with associated car parking.

Planned Development

- 4.19 The Council has a 20 year vision to turn Lakeside into a town centre in an attempt to modernise the shopping areas built for purpose in the 1980/90s. Intu Lakeside has permission to deliver a £100m leisure and shopping development comprising new cafes, restaurants and leisure uses around the existing Vue cinema as well as family entertainment venues, bars and health and fitness facilities, focused around a new public square (13/00880/OUT). The development proposals include 1,007 sq. m of A1 shops, 9,267 sq.m of A3 cafes and restaurants, 5,340 sq.m C1 hotel use, 11,901 sq.m D2 leisure and 21,123 sq. m of other uses. We understand that construction of this is currently underway and completion is expected in 2017. Lakeside also has outline permission for an £180 million investment which will see an increase in retail floorspace and improved transportation links. Approximately 43,700 sq.m of additional floorspace will be created at the northern end of the centre, increasing Intu Lakeside by around a third of its size and incorporating up to 40 new shopping units.

Chelmsford

Venuescore Retail Ranking (2014): 69 | Comparison goods trade draw from survey area: £33.7m

- 4.20 Chelmsford city centre is the principal shopping centre as determined in the Chelmsford Borough Core Strategy (2008). The city centre hosts a total retail floorspace of 130,140 sq.m across 596 outlets. The primary shopping area is focused around the pedestrianised High Street (anchored by Debenhams and Marks & Spencer) and in the High Chelmer Shopping Centre and Meadow Shopping Centre. High Chelmer is a shopping centre dating back to the 1970s; it has over 80 stores and it is anchored by a Primark and Boots store and hosts a number of high street comparison clothing retailers including Next, Topshop, New Look, Miss Selfridge and River Island. Work began in July 2015 to transform existing units at the north entrance to High Chelmer into a restaurant piazza and to redesign and refresh the public square at Exchange Way (14/00377/FUL).
- 4.21 Meadow Shopping Centre generally has a lower quality retail offer but hosts a good mix of retail outlets including high street clothing chains, coffee shops, retail service outlets and a large Wilko anchor store. There is a good leisure offer across the city centre comprising a significant number of restaurants and cafes in addition to an Odeon Cinema located on Kings Head Walk to the south of the town centre. Chelmsford also has a good number of sports and leisure facilities including The Gym Group and Anytime Fitness.
- 4.22 The redevelopment of Bond Street shopping area (the land to the rear of Chelmsford High Street) has recently been completed and introduced a 6,000 sq.m John Lewis store (the first John Lewis store in Essex), shops, restaurants, office floorspace and an Everyman cinema. City Park West, a new development close to Chelmsford railway station, will offer commercial, retail and restaurant uses.

Epping

Venuescore Retail Ranking (2014): 646 | Comparison goods trade draw from survey area: £31.4m

- 4.23 Epping is recognised as a Principal town centre in the Epping Forest District Council Combined Local Plan with Alterations (1998 and 2006). The total retail floorspace of 29,580 sq. m set across 165 outlets is located in a linear fashion along High Street. The retail offer is varied across the centre and the comparison offer comprises predominantly charity shops, DIY/ home improvement and womenswear and menswear clothing shops. A small number of high street comparison retailers present include Fatface, Next, Superdrug, Boots, Carphone Warehouse and Card Factory, all located in the northern portion of the High Street.
- 4.24 A Tesco supermarket (circa. 2,220 sq. m net) anchors the south of High Street, while a Marks & Spencer Simply Food store (circa. 1,310 sq. m net) anchors the food shopping offer to the north of the High Street. There is a good range of cafes and restaurants including Prezzo, Caffè Nero, Costa Coffee and a number of independent establishments however there also is a strong presence of takeaway shops along the High Street.
- 4.25 A major leisure and commercial hub has been proposed for a site close to Epping High Street, in St John's Road on the western edge of the town centre boundary. The £3.2 million regeneration project proposes a three-screen cinema, shops and restaurants, new homes and new town council offices. Frontier Development has been picked as the preferred developer for the site, however plans have stalled and a planning application has not been submitted.

Hoddesdon

Venuescore Retail Ranking (2014): 616 | Comparison goods trade draw from survey area: £27.9m

- 4.26 Hoddesdon, situated within the Borough of Broxbourne, has a retail offer more geared towards convenience goods shopping, with large branches of Sainsbury's (c. 5,000 sq.m net) and Morrisons (c. 4,260 sq.m net) anchoring the town centre offer, along with edge-of-centre small Aldi and Asda stores. The core retail area is located along High Street and Fawkon Walk. Multiple retailers trading in the centre include New Look, Boots, Clinton Cards, Card Factory and Peacocks clothing, while the rest of the comparison offer mainly comprises independent stores and charity shops. The comparison goods offer is largely orientated towards meeting day-to-day shopping needs.

Waltham Cross

Venuescore Retail Ranking (2014): 539 | Comparison goods trade draw from survey area: £28.8m

- 4.27 Waltham Cross town centre is also located in the Borough of Broxbourne west of Waltham Cross station, and offers a total retail floorspace of 45,590 sq. m across 162 shopping outlets. The primary retail shopping areas are mainly focused around the pedestrianised High Street and the Waltham Cross Shopping Centre (The Pavilion). The comparison offer in the town centre is dominated by charity shops and only a small number of high street retailers are present in the Waltham Cross Shopping Centre including New Look, Boots, Peacocks, Bonmarche, Superdrug, Holland and Barrett and Shoe Zone. To the north of the town centre Homebase and Wickes anchor the area.
- 4.28 A Sainsbury (circa 1,370 sq. m net) which is located in the Shopping centre anchors the town centre convenience offer. The rest of the convenience offer comprises a TFC Supermarket (circa 930 sq. m net), Iceland store (circa 960 sq. m net) and Lidl store (circa 410 sq. m net). This is in addition to a number of bakers and grocer shops. Plans have recently been unveiled in early 2016 for a £644,000 public realm regeneration project named Waltham Cross Renaissance, which will see further pedestrianisation of the High Street.

Cambridge

Venuescore Retail Ranking (2014): 28 | Comparison goods trade draw from survey area: £25.9m

- 4.29 Cambridge is a nationally and internationally important city known for its higher education, knowledge-based industries and tourism. The shopping and retail offer is extensive and accordingly, the Cambridge City Council Local Plan (2006) defines Cambridge as a sub-regional shopping and service centre. Cambridge Central is functioning as a comparison shopping destination hosting a total retail floorspace of 121,870 sq. m across 587 outlets. The city centre has a strong retail offer mix offering a good range of high street and boutique retailers, coffee shops, restaurants, specialist craft markets and two shopping centres (The Grand Arcade and The Grafton). Anchor stores in the centre include two Marks & Spencer stores, Primark, Next and a John Lewis department store. Cambridge offers a range of retail and also hosts a number of high quality retailers such as Jigsaw, Coast, Jaeger and Molton Brown, and has an extensive café and restaurant offer. There is also a strong offer of other leisure uses in Cambridge Central including sports facilities and theatres such as the Glassworks Health Club, the Corn Exchange Theatre and the ADC Theatre.

Westfield Stratford City

Venuescore Retail Ranking (2014): 30 | Comparison goods trade draw from survey area: £17.2m

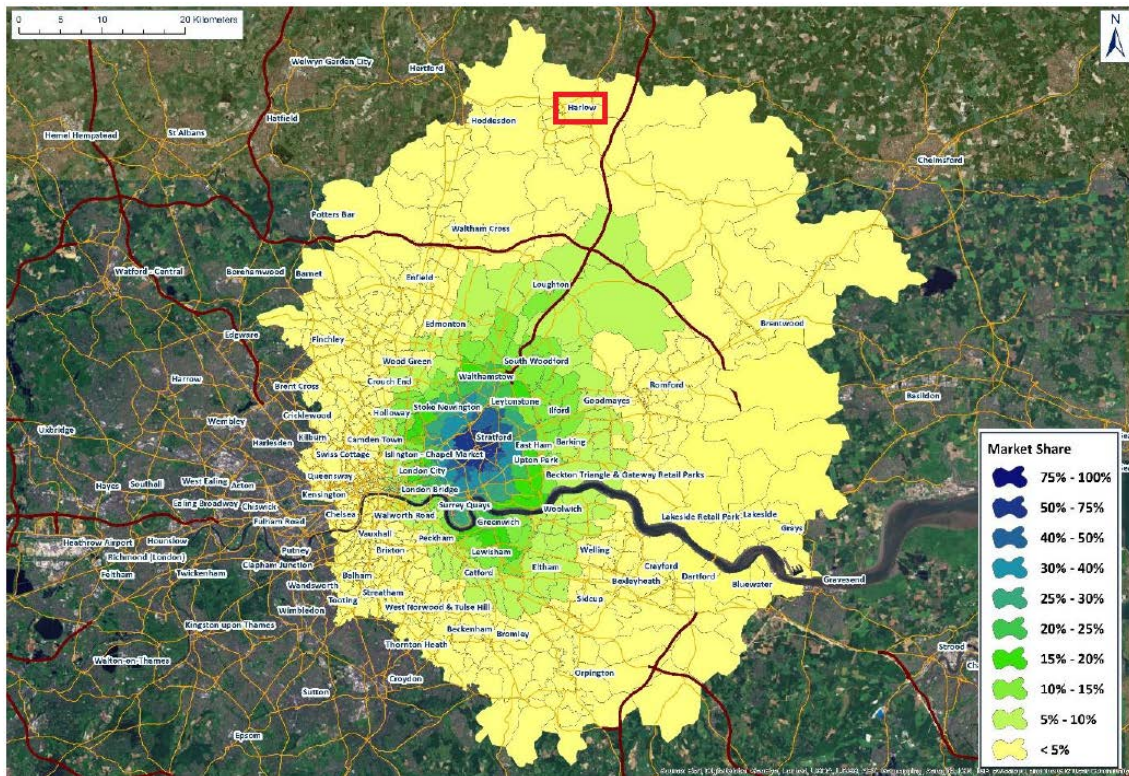
- 4.30 Westfield Stratford City opened in 2011 directly adjacent to Stratford town centre and comprises approximately 331 stores comprising over 175,000 sq. m of retail floorspace and around 70 restaurants. The development was not trading at the time of the Council's previous retail study. It is one of the largest urban shopping centres in Europe, and the third largest shopping centre in the United Kingdom. Westfield London has arguably become the main lifestyle and shopping destination serving east London — although the household survey undertaken in support of this study shows it does not exert a significant influence on shopping patterns of residents in the District, and, as with Lakeside, Harlow lies on the outer periphery of the catchment of the development (**Figure 4.4**)
- 4.31 Despite both Lakeside and Stratford both having a catchment that only just extends as far as Harlow, the trade draw to Lakeside from residents in the Borough compared to that of Stratford is significantly higher, despite both centres being accessible in roughly 40 minutes drive from Harlow, and Stratford benefiting from better accessibility by public transport.

4.32 Westfield London is anchored by a John Lewis, Waitrose Supermarket, Marks & Spencer’s department store and a 17-screen Vue Cinema. The bulk of the retail offer in the development comprises of fashion/lifestyle retailers and there is considerable overlap with the retail offer of Lakeside in this respect. Westfield also hosts a range of restaurants, and All Star Lanes bowling alley and a Gym Box fitness club which contributes to its overall leisure offer. The wider regeneration of the adjacent Queen Elizabeth Olympic Park continues to take shape, and will be complemented in the next few years by the introduction of a new academic and cultural quarter.

Planned Development

4.33 In addition to the above-mentioned proposals, Westfield Ltd is proposing to develop up to 1225 homes, a 2,700 sq.m public park, approximately 2,800 sq.m of commercial spaces to be used by small to medium sized businesses and start-ups, as well as a further 9,300 sq.m of retail floorspace. This scheme is proposed for the Cherry Park site which is located immediately to the South of the existing Westfield Stratford City shopping centre and is currently vacant and underutilised.

Figure 4.4: Westfield Stratford City catchment area



Source: Harper Dennis Hobbs Retail Centre Reports 2016

Summary

In this section we have set out a summary of the current retail and leisure offer in the network of centres which surrounds Harlow and which compete for spending with Harlow town centre and other retailing facilities in Harlow. The findings of the household telephone survey of shopping patterns undertaken in support of this study confirm the extent to which these locations compete for spending for residents within the survey area which we have used as the basis of our assessment.

The two centres which principally compete for spending with Harlow are Bishop’s Stortford, which draws £168.7m of comparison goods spending from the survey area, and Brookfield in Cheshunt, which draws £105.6m. The latter location has recent identified proposals for an expansion of its retail and leisure offer which could potentially exert further influence over shopping patterns of residents in Harlow District and these proposals will need to be carefully monitored by the Council.

A clutch of other destinations all draw between c. £26m and c. £56m of comparison goods spending from the survey area — these are Welwyn Garden City, Hertford, Lakeside, Chelmsford, Epping, Central London, Hoddesdon and Cambridge. Generally these centres have a more limited influence over residents’ shopping but nevertheless represent a secondary tier of competing centres.

A major change in the shopping provision which has occurred since the Council's previous retail evidence base study is the opening of the Westfield Stratford City development in east London, but the survey evidence indicates that this only has delivered a relatively limited impact on shopping patterns of residents in the survey area; in total, Westfield Stratford City draws just £17.2m of comparison goods spending from the survey area, and of this approximately £3.1m is derived from residents in Harlow.

5 ASSESSMENT OF TOWN & NEIGHBOURHOOD CENTRES

In this section, we present an updated ‘health check’ assessment of Harlow town centre and the network of neighbourhood centres in the District. Our assessment focuses on the town centre (as defined in the Adopted Replacement Harlow Local Plan, July 2006) of Harlow, alongside the neighbourhood centres of The Stow, Church Langley, Staple Tye, and Bush Fair. Our assessment of each centre is based on the ‘vitality and viability’ indicators for assessing the ‘health’ of a town centre as set out in the National Planning Practice Guidance (NPPG), and is based on a combination of our own assessments of the centre based on site visits undertaken in April 2016, and secondary data sources such as Experian Goad, who produce ‘Category Reports’ showing the diversity of uses in centres, CoStar Focus Commercial Property Database, and IGD, as well as the Council’s own monitoring data where available.

Approach to health checks

- 5.1 Paragraph 005 of the Planning Practice Guidance (PPG) ‘Ensuring the vitality of town centres’ identifies the indicators should be used to assess the ‘health’ of town centres, and accordingly we structure our assessment along these lines for each centre. In some instances to avoid overlap in discussion or repetition we group indicators together for the purposes of our discussion. The PPG ‘health check’ indicators are set out below, following which we set out a full health check of Harlow town centre and summary health checks of the neighbourhood centres. It should be noted that data is not available for indicators C and F for the neighbourhood centres.

- Indicator A: Diversity of uses
- Indicator B: Proportion of vacant street level property
- Indicator C: Commercial yields on non-domestic property
- Indicator D: Customers’ views and behaviour
- Indicator E: Retailer representation and intentions to change representation
- Indicator F: Commercial rents
- Indicator G: Pedestrian flows
- Indicator H: Accessibility
- Indicator I: Perception of safety and occurrence of crime
- Indicator J: State of town centre environmental quality

Harlow town centre health check

Introduction

- 5.2 Harlow is only defined ‘town centre’ within the District. It is the focus for the District’s comparison goods shopping, although the retail parks of Edinburgh Way also have a large comparison goods offer, which compete for spending with the town centre. Additionally, Harlow town centre has a range of employment facilities (including the Civic Centre), leisure facilities (including bowling, a new gym and bingo) and two supermarkets (Tesco Metro and a large Asda store). To the north of the town centre (outside the defined centre boundary but within walking distance of the centre) is a large Sainsbury’s store.
- 5.3 The centre is pedestrianised throughout and much of the ‘prime pitch’ retail offer is occupied by national multiple retailers, particularly in the covered Harvey Centre and the Water Gardens, a southern extension to the town centre which opened in 2003/4. The town centre has a limited food and beverage offering, generally centring upon national operators including Costa Coffee and Greggs, Frankie and Benny’s, Nando’s and Pizza Express. Most of these are concentrated in the Water Gardens.

Diversity of uses & retailer representation (PPG Indicators A and E)

- 5.4 As noted above, the town centre is well served by foodstores, anchored by Asda in the Water Gardens and Tesco Metro within the Harvey Centre. Other more specialist convenience stores such as butchers, grocers and bakeries are less well-represented within the town centre, and this is reflected in the fact that most recent the Experian Goad

Category Report for Harlow town centre (2015) suggests that, at 5.9%, the current provision of convenience stores is approximately half the national average of 11.3%.

- 5.5 Harlow town centre has a solid (if fairly typical) comparison goods offer; the Experian Goad report indicates that comparison goods retail provision in Harlow town centre is 7% above the UK average of 49.2%. Much of the comparison goods offer is orientated towards the middle to lower-end of the market. Harlow provides a good mix of fashion multiple retailers (TK Maxx, River Island, H&M, New Look, Next, Topshop etc), with the majority of these located in the Water Gardens. A moderately-sized Primark store is an important anchor to the older Broad Walk area, and this store is also accessible from the Harvey Centre. Generally speaking, the higher quality retail offer is centred upon the Water Gardens, with a lower quality retail offer in the Harvey Centre, Broad Walk and surrounds. The quality of the retail offer diminishes significantly towards the northern end of the town centre, particularly beyond the Primark store on Broad Walk.
- 5.6 There are a number of food and beverage outlets within the Harvey Centre, however very few of these are open after 17.30. Higher quality 'casual dining' food and beverage outlets are located within the Water Gardens — but these are limited to Pizza Express, Frankie and Benny's, Nando's and Five Guys, along with a branch of Esquires Coffee.



Harvey Centre

- 5.7 A market takes place in Market Place (although this has recently been extended to include the northern end of Broad Walk), every Monday, Tuesday, Thursday, Friday and Saturday, and this is an important attractor of footfall.
- 5.8 The commercial leisure offer within Harlow town centre is limited. For a long period of time there has not been a cinema within the town centre; the only cinema in the area has been out of town at The Queensgate Centre on Edinburgh Way, which is currently operated by Cineworld. Positively however Cineworld have recently opened a second cinema in Harlow, as part of the extension to the Harvey Centre which has recently been completed. Additionally, there is a Quasar Centre and 10 pin bowling centre within the town centre. The Playhouse is also located within the town centre at Playhouse Square — the Playhouse appears to attract a good range of acts, from national productions to local theatre. There are a handful of bars/public houses distributed throughout the northern end of the town centre, alongside a cluster of late night bar/club venues in East Gate/Stone Cross/Post Office Walk, although these generally are of fairly poor quality.
- 5.9 Overall for the size of the town centre there is a good level of retailer representation of both independents and national multiples. There is a lack of higher-end retailers in the centre, which may partly be a reflection of the current demographic profile of the town, and partly the fact that, reflecting the trends identified earlier in this report, middle/higher-end retailers are increasingly concentrating their activities in higher-order centres (such as Chelmsford, Bluewater and Stratford), and therefore are less likely to have a requirement for a trading presence in centres such as Harlow.

- 5.10 In terms of **intentions to change representation**, analysis of the CoStar commercial property database suggests that published retailer requirements for Harlow are relatively limited. However requirements of note include a requirement for further representation from Aldi, who are seeking a store of c. 1,700 sq.m, as well as requirements from a number of pub/restaurant operators including Greene King, Marston's, Harvester, Frankie & Benny's and Chiquito. It should be noted that not all operators publish their requirements, and also that requirements are linked to the availability of modern, well-sited floorspace.

Proportion of vacant street level property (PPG Indicator B)

- 5.11 There are a number of vacant units within the town centre, including several within the Harvey Centre but more noticeably towards the northern end of the town centre, particularly the northern end of Broad Walk (beyond Primark), with a number of vacant units also located on the south side of East Gate and along West Gate. The large BHS unit which anchors the southern end of the Harvey Centre has recently become vacant, following the company entering administration. This has released a large and relatively prominent unit onto the market, and there could be potential to capitalise on the works recently completed on the former Marks & Spencer unit nearby (see below) to introduce a new 'anchor' operator to the centre. The closure of the BHS store will leave the town centre without a department store, and this would represent a significant gap in the retail offer in the town centre.
- 5.12 Experian Goad data (2015) states that vacancy rates within Harlow are considerably above the national average of 11.2%, at 21.4%. However, this high vacancy rate reflects the fact that there are 17 units which are under modernisation at Little Walk, which forms part of the Harvey Centre. This part of the centre is currently being redeveloped, necessitating the closure of these units, and the effect of this is to inflate the vacancy. However, notwithstanding this, the large number of vacant units towards the northern end of the town centre does represent cause of concern and is an indication that this part of the town centre is struggling for a clearly defined role and function at present.
- 5.13 Marks & Spencer recently vacated a large ground floor unit within the Harvey Centre. A planning application for the redevelopment and reconfiguration of this unit has been approved (see Section 2) which has resulted in the subdivision of the unit to form seven new units at ground floor level. At present four tenants have been secured, including a Starbucks which occupies the prominent corner unit at the entrance to the Harvey Centre. Separately, the first floor of the Harvey Centre has also recently been refurbished, resulting in the opening of the aforementioned new Cineworld cinema (which opened in December 2016) and a number of new restaurant units. These two developments have delivered an uplift in range of retail and leisure uses available at the Centre.

Commercial yields and commercial rents (PPG Indicator C & F)

- 5.14 Analysis of information from the CoStar Commercial Property Database shows that rents in Harlow have declined quite significantly in recent years, reducing from c. £21 per sq.ft in 2013 to c. £16 per sq.ft in 2015, and most recently to c. £12 per sq.ft in 2016. This is an indicator which needs to be monitored carefully moving forward, as it shows that rents are needing to be reduced in order for units to be taken up. The recent investment in the town centre which this report discusses will hopefully result in a degree of stabilisation or upturn in prime retail rents as the overall attractiveness of the town centre as an investment location improves. The current trends do, therefore, present some cause for concern and need to be closely monitored.

Customers' views and behaviour (PPG Indicator D)

- 5.15 The household telephone survey also asked users of Harlow town centre (and each of the neighbourhood centres, discussed separately below) the main reasons for which they visited the centre, what they liked and disliked about the centres, and what they felt could be improved.
- 5.16 In terms of Harlow town centre, the survey results indicated that:
- Over 50% of users of the centre only visit once a month or less often. 16.0% visit once a week, and 15.4% visit once every two weeks. The proportion of residents who visit more than once a week is under 10%.
 - The main purpose of visiting the centre by some margin is to undertake non-food shopping (65.6% of responses). Despite the presence of the large Asda store in the town centre, food shopping accounted for just 7.4% of visits. Other reasons for visiting the centre typically attract low figures, and of particular note is that 'leisure activity' accounts for just 2.1% of responses, and visiting a cafe, pub or restaurants attracted just 5.3% of responses. These are low figures which confirm the limited commercial leisure offer in the centre at present.
 - Over half of all respondents do not undertake a 'linked' activity when they visit Harlow town centre; that is to say, they only have a single reason to visit. For those respondents that do undertake a secondary activity, visiting a cafe/pub/restaurant scores more strongly (15.8%) but nevertheless we consider this to remain a relatively low

figure. Food shopping also attracted a relatively low response for this question, with just 9.9% of respondents stating that they undertake this as a secondary activity.

- When asked what they liked about the town centre, it can be seen there is a reasonable level of satisfaction with the non-food retail offer in the centre - 27.4% of respondents said they liked the 'good range of non-food shops' (the most popular response), and 19.8% stated they liked the 'good range of chain stores' (the second most popular response). Other qualities which respondents liked about the centre were that it is close to home (18.8%) and easy to park (13.5). 18.0% of respondents stated that there was 'nothing' they liked about the centre.
- When asked what they disliked about Harlow town centre, a significant proportion of respondents (37.3%) stated that there was 'nothing' they disliked about the centre. 12.9% of respondents stated they disliked the poor environment/appearance of the centre. This aside, there was no attribute that attracted a noticeably high percentage of responses; 3.4% of respondents identified a concern with vandalism in the centre, and 5.1% mentioned the lack of parking. 3.0% of respondents specifically mentioned the closure of Marks & Spencer.
- When asked how Harlow town centre could be improved, only one quarter of respondents stated there was no need for the centre to improve - the lowest level of satisfaction of any of the town / neighbourhood centres in the District. Areas which respondents stated could be improved were fairly extensive, but many related to improving the range of shopping facilities - for example 10.0% of respondents wished to see a better choice of shops, and 10.5% stated better larger shops / department stores, and 6.5% said bringing back the Marks & Spencer store which recently closed. Other areas of improvement related to the physical appearance of the centre - 8.6% stated the appearance of the centre could be improved, and a further 8.7% wished to see a 'complete refurbishment / modernisation' of the centre. In addition, 6.0% wished to see more car parking and 3.9% free / cheaper parking. Reducing the number of vacant units was seen as a priority for 3.6% of respondents.
- The household survey also asked questions on how long users of the centre typically spend in the centre. The most popular response was between 2 and 2.5 hours (24.9% of responses), which is a reasonable dwell time, albeit one which could be further improved. Over 20% of visits to the centre spend under an hour in the centre; a further 30% spend under 2 hours. The addition of a cinema and better café/dining facilities will hopefully assist in dwell times in the centre being extended.

Pedestrian flows (PPG Indicator G)

- 5.17 We are not aware of any formal pedestrian flow counts which have been undertaken in the town centre. During our visits to the town centre we observed a constant flow of people throughout most of town centre, with the highest levels were observed in Water Gardens, Harvey Centre and Broad Walk. This not a surprising observation — these areas have the principal 'attractors' in terms of the main 'anchor' retailers, civic facilities, car parks and so on. The footfall does extend further northwards on market days, but even on these days there are parts of Town Centre North remains low. The northern exit of the Harvey Centre, and the areas on and surrounding West Way, West Gate and the western end of East Gate, were noted as areas where footfall was particularly low.

Accessibility (PPG Indicator H)

- 5.18 Due to the principles of the development of Harlow, the nature of the settlement is relatively dispersed — consequently the town feels very dominated by the car. Having said this, as with a lot of development in the 1960's, the main town centre itself is pedestrianised, and this has a positive impact in terms of encouraging pedestrian movement between the different areas of the town centre. The main car parks within Harlow town centre (The Water Gardens, Harvey Centre, Terminus Street and Post Office Road) are on the periphery of the town centre. The result of the car parks being located where they are, is that the routes to the town centre from the car parks appear to have a much higher footfall than areas not directly connected to the car parks. Whilst there is not any data as part of this study to quantify which car parks are the most used, it is clear from the household survey that the number of parking spaces and ease of accessibility to the car park is an area of concern to some users of the centre.
- 5.19 The bus station is located to the east of the town centre, and is directly accessible via East Walk / Broad Walk, and thus is well connected to the prime retail offer in the town. The bus station is relatively functional and takes up a large parcel of land relative to the frequency of services which appear to run from it. There is an opportunity for intensification of this site, provided that bus interchange facilities could be retained. Buses connect the town centre with the network of neighbourhood centres, and also with Harlow Town rail station, although there is scope for improving connections in this respect, possibly through the introduction of a dedicated 'shuttle' service.
- 5.20 Harlow is well connected both by car and train — the town is located just off the M11, which connects both London and Cambridge. Harlow benefits from a main line rail connection to London Liverpool Street, Stratford, Stansted Airport, Bishops Stortford and Cambridge, although the station is approximately 15 minutes' walk from the town centre.

Harlow Mill station, located to the north of the town in close proximity to Edinburgh Way, has more limited frequency services.

Perception of safety and occurrence of crime (PPG Indicator I)

- 5.21 The town centre felt generally safe. However due to the harshness of the landscaping, the town centre does not lend itself to dwell time, indeed there is sense of functionality to the town centre. It is clear from the responses to the household survey that perception of safety is a concern of some shoppers — 2.3% of respondents stated that the town centre was unsafe, lacked security and was considered dangerous, 4.5% of respondents stated that they disliked the presence of vandals/hooligans and 1.8% of respondents thought that Harlow attracted an undesirable clientele.

State of town centre environmental quality (PPG Indicator J)

- 5.22 The environmental quality of Harlow is a product of being a 1960s new town, one which is for the most part dominated by concrete and hard landscaping. The town centre would benefit from improvements to the public realm to soften the hard landscaping of the centre. A unified public realm strategy throughout the town centre in the form of coordinating street furniture would be beneficial. Additionally, the introduction of urban greening, throughout the centre would enhance the public realm — for the size of the town, Broad Walk is quite wide, and could accommodate planters and trees.
- 5.23 Harlow town centre (along with the wider urban area) contains a substantial number of sculptures, many of which are important examples of post-war architecture, and a number of which are listed. These are a hugely important asset to the town centre, and represent assets which could potentially be further developed as focal points for landscaping, new public realm and so on. The sculptures help to add character to the centre but are, in some cases, slightly lost amidst other ‘clutter’ and street furniture.
- 5.24 The market is currently located in the part of the town centre most at threat; therefore it could be assumed that the market generates a certain level of footfall to sustain the shops that are currently located there. However, further into the town centre, the Broad Walk/Water Gardens area would benefit from having some event space. A particular issue is the permeability between Broad Walk and Water Gardens — currently there are no clear sight lines into the latter from the former, and the walk between the two is a rather uninviting one along the side of a New Look store. The sight line is interrupted by the presence of a library building (see image) which contributes relatively little to the wider environmental quality of the area.



Harlow Library

Old Harlow neighbourhood centre — summary health check

- 5.25 Old Harlow is the historic centre of Harlow and the original settlement. It therefore has a noticeably different character and urban form to the rest of the Harlow urban area and network of neighbourhood centres. It is centred upon a pedestrianised High Street, with the main anchor store being a small Co-Operative foodstore, located midway along the High Street. There is also a bakery, 4x estate agents, a dry cleaners, 3x public houses, a Barclays Bank (slightly off-centre), and a specialist beer/deli store. There are a significant number of takeaways within the centre, however this is not unexpected within a smaller centre. There are also a number of relatively upmarket pubs clustered around the edges of the centre. There are a number of vacant units in the centre, and proportionately the number of vacant units appears higher than in the other neighbourhood centres in the District. Whilst not of particular concern, this should be closely monitored for further increases.
- 5.26 Parking is on the edge of the centre and it is necessary to walk in to the centre. Parking levels appear to be at/approaching capacity levels, and on our visits to the centre it was noted that the main car parks serving the centre — on Wayre Street and Garden Terrace Road — were both heavily used. This is partly likely to be a reflection of the fact that located on the edge of the centre are a large number of peripheral uses which are also likely to have a role in generating footfall, such as a children's centre, doctor's surgery and community theatre. The area surrounding the centre is comprised of residential uses, leaving the centre little scope for outward expansion.
- 5.27 The centre would benefit from a shopfront strategy, as some of the unit signage appears a little dated. Otherwise, the environmental quality of the centre is generally good, with the pedestrianised High Street attractively landscaped and the centre kept clean and well-presented.
- 5.28 The household survey sought views from users of the centre on their main reasons for visiting and likes and dislikes of the centre:
- The household survey results indicate that Old Harlow has relatively infrequent levels of visits compared to some of the other neighbourhood centres in the District: 12.3% of users of the centre visit daily; a further 2.8% visit 5-6 times a week. Most users of the centre visit once or twice a week.
 - In terms of the main reasons for visiting the centre, 26.1% state food shopping, and 13.1% state visiting health service facilities (e.g. a doctor's surgery), confirming our own observations regarding the importance these facilities have as footfall drivers (visiting these facilities was also a secondary reason for visiting for a further 19.3% of respondents). 11.8% of respondents stated their main reason for visit was to go to a café, pub or restaurants — the highest percentage for this type of use for any of the centres in the District (including Harlow town centre).
 - When asked what they liked about Old Harlow, two clear responses were the most popular — its proximity to home (29.1%) (proximity is generally the most popular reason why respondents liked all of the neighbourhood centres), and its attractive environment(24.5%). 9.7% of respondents stated it was easy to park.
 - When asked what they disliked about Old Harlow, 79.9% of respondents stated 'nothing', suggesting a high level of satisfaction amongst users of the centres. This is the highest level of satisfaction of any centre in the District. 4.7% of respondents stated that there was not a great enough choice of shops.
 - Similarly, when asked what could be improved in the centre, 51.0% of respondents stated 'nothing', again the highest figure for any of the centres in the District which were surveyed. A large number of other responses attracted modest levels of responses, e.g. 6.1% of respondents wanted to see more car parking, 4.3% of respondents wanted to see free/cheaper car parking, and 5.4% of respondents wanted to see a better choice of shops.
 - Almost half of all respondents spend under an hour in the centre, which is reflective of its role and function as a neighbourhood centre. Conversely, almost 30% of respondents spend over two hours in centre, which is likely to be reflective of the reasonably high number of complementary uses in the centre such as pubs, the doctor's surgery, and so on.



Old Harlow

The Stow neighbourhood centre — summary health check

- 5.29 The Stow is one of the 'original' neighbourhood centres in the District, constructed as part of development of Harlow New Town. It is relatively high density for a neighbourhood centre — the majority of commercial premises have residential accommodation on upper floors, and this is an important consideration in assessing the ability of the centre to accommodate future growth. The centre is pedestrianised throughout, although, as with Harlow town centre, there is a definite need to 'soften' the environmental appearance of the centre to break up the harshness of the urban landscape. As set out in Section 2, a Supplementary Planning Document was published by the Council in 2016 to provide a design framework to guide the regeneration of The Stow.
- 5.30 The centre has a good retail mix for its role and function as a neighbourhood centre and we are satisfied that many local residents' day to day shopping needs can be met by the mix of uses in the centre. The centre includes One Stop and Bargain Booze stores, which are both able to meet basic top-up shopping needs. Other facilities in the centre include 2x pharmacies, a bakery, butcher, library, laundrette, dry cleaner, 3x takeaways, a tailors and a barbers. There are a couple of qualitative gaps in the offer — the absence of any banking facilities or stores selling household goods for example — but for the most part the diversity of uses can be considered satisfactory.
- 5.31 On the edge of the centre, a new Aldi store represents a positive enhancement of the offer of the centre. The store is outside the defined policy boundary of the centre but is within easy walk — however for the store to properly function as part of the neighbourhood centre there will need to be significant enhancements to the linkages between the 'traditional' neighbourhood centre and the new store (in terms of wayfinding, footpath improvements and so on). At present, the Aldi store appears to generate most of its custom from car-borne trade rather than from linked trips from users of the neighbourhood centre.
- 5.32 The vacancy rate in the centre is low, which is a positive reflection on the vitality and viability of the centre. There are a number of quasi-industrial uses between the centre and the Aldi store, as well as to the west of the centre, which do not particularly add to the overall 'offer' of the centre but nevertheless are likely to help generate additional footfall to support the stores in the neighbourhood centre.
- 5.33 The household survey sought views from users of the centre on their main reasons for visiting and likes and dislikes of the centre:
- The frequency of which users of the centre visit is relatively mixed — for example whilst 25.7% of users of the centre visit 5-6 times a week, and a further 13.2% visit daily, 16.6% only visit once a week, and 25.3% only visit once a month.
 - 55.4% of respondents visit the centre to undertake food shopping, and 22.8% for non-food shopping. 11.8% of respondents visit the centre for financial services, such as post offices, ATMs and so on. The survey results also

show that The Stow has the highest level of ‘linked trips’ shopping of any centre in the District; only 16.5% of users of the centre visit the centre for only one reason. The most popular type of linked trips shopping is financial services (36.5%) and non-food shopping (33.0%).

- When asked what respondents liked about the centre, 36.7% liked its proximity to home; 25.0% the ease of parking; 22.9% the good range of well-known stores; and 17.0% the fact that it was clean/well-maintained.
- In terms of dislikes, whilst 43.9% of respondents stated that there was ‘nothing’ they disliked about the centre, a clear area of concern amongst users of the centre is antisocial behaviour — 21.2% of respondents stated that ‘vandals/hooligans’ is a concern, and 17.0% said ‘undesirable clientele’. Whilst antisocial behaviour also appears to be an issue in Bush Fair (discussed below), The Stow appears to be the centre where this is the greatest concern.
- Related to the above, when asked how the centre could be improved, 17.0% stated ‘closing the pubs during the day’ would be beneficial — the second highest of all responses (behind ‘no need to improve, at 29.2%, the lowest level of satisfaction of any centre).
- In terms of dwell time, almost three-quarters of respondents spend under an hour in the centre.

Bush Fair neighbourhood centre — summary health check



5.34 Bush Fair shares a number of attributes and characteristics with The Stow — both centres were constructed at around the same time, and both are relatively high-density developments with residential uses on upper floors. Bush Fair is also, like The Stow, pedestrianised and set around a central courtyard.

5.35 The centre is anchored by a Co-Operative store, however this is a small store which is only likely to meet a limited number of day-to-day/top up shopping needs, and compared to most of the other neighbourhood centres, the centre is fairly poorly served in respect of the provision of convenience goods floorspace. Elsewhere in the centre, there are two branches of Boots Pharmacy, a butchers, a Greggs take-away, Martin newsagents, a hardware/general store,

beauty salon, a cycle store, card & gift shop, café, post office, and library. There is also a branch of Lloyds Bank — one of the few neighbourhood centres in the District to have these facilities. Positively, no vacant units were observed in the centre.

5.36 The centre has some original features including tiled signs, which contribute to the sense of place in the centre. In common with The Stow, the centre would benefit from some softening and increased public realm, landscaping and so on, as well as improvements to the external entrances into the centre. The environmental appearance of the centre, in its current form, feels somewhat harsh and uninviting. Again, as with The Stow, the areas immediately adjoining the centre contain a number of light industrial uses which are likely to help contribute to footfall.

5.37 Again, the household survey sought views from users of the centre on their main reasons for visiting and likes and dislikes of the centre:

- In terms of frequency of visits, 28.8% of respondents visit the centre once a week, whilst 25.7% visit daily.
- Unusually for a neighbourhood centre, non-food shopping is the main reason for most respondents visiting the centre (55.2% of respondents), compared to 22.7% who visit for food shopping. Other reasons for visiting the centre attract low levels of responses, although visiting financial services/post offices, and health service facilities, both score highly as secondary reasons for visiting, suggesting an element of ‘linked trips’ shopping takes place.
- When asked what they like about centres, 57.9% of respondents stated the proximity to their home. No other reasons attracted noticeably high percentages.

- In terms of what respondents dislike about the centre, two key areas of concern are apparent. 20.5% of respondents state concerns of vandals/ hooligans in the centre, whilst 16.1% of respondents said they consider the centre to be unsafe/dangerous or have poor security. As with The Stow therefore, there are clear areas of concern amongst users of the centre in respect of antisocial behaviour. In addition, 9.3% of respondents stated that lack of parking was a further area of concern.
- Reflecting the above concerns, when asked how the centre could be improved, 19.0% of respondents stated that improved CCTV/security should be provided. 13.1% stated more car parking should be provided. 38.9% of respondents stated they was no need to improve the centre.
- Bush Fair records the highest number of short-term visits of any of the neighbourhood centres — 60.5% of respondents visit for under 30 minutes, whilst a further 15.2% of respondents visit for between 30 minutes and an hour.

Church Langley neighbourhood centre — summary health check

- 5.38 The neighbourhood centre of Church Langley is a purpose built district centre dating from the 1990s, built to serve the needs of the (at the time) new residential areas nearby. The centre is anchored by a large Tesco store; this store opened 1994 but has benefited from investment by the company in recent months including a complete refreshment of instore signage and wayfinding, which has been extended to the car park. Despite the store being 20+ years old, the store feels modern and contemporary. The non-food offer is located at the back of the store and we estimate this accounts for approximately 20% of the overall sales area of the store.
- 5.39 Other than Tesco, there are relatively few other uses in the remainder of centre compared to some of the other neighbourhood centres — other uses include a Brewers Fayre pub; health centre and pharmacy; dry cleaners; and a hair & beauty salon. There is also a pharmacy within the Tesco store. Although in numerical terms, the number of units is substantially lower than the other neighbourhood centres, in reality the size of and retail offer within the Tesco store means that most local residents' shopping needs can be met. The downside of the dominant role played by the Tesco store is that there is limited consumer choice for most convenience (and comparison) shopping goods.
- 5.40 There is no bank within the centre, but there are ATM facilities available at the Tesco store. A positive enhancement to the overall offer of the centre might be the introduction of a café/coffee shop facility. Positively, there are no vacant units within the centre. The centre is accessible by public transport but appears to cater for predominantly car-based visits, again likely to be on account of the fact the centre is anchored by the large Tesco store.
- 5.41 The household survey identified that:
- Church Langley has different patterns of usage to most of the neighbourhood centres — most respondents visit either once a week (35.3%), twice a week (15.6%) or once a month (13.3%). Only 2.2% of respondents visit daily. Food shopping is, by some margin, the main reason respondents visit the centre, accounting for 75.4% of all trips. These trends all reflect the fact that the centre's role and function is orientated around the Tesco store, and in turn the size of this store as a large format supermarket means more residents are visiting for weekly/bulk shopping than for day-to-day top-up shopping.
 - The only 'linked trip' which attracted a significant number of responses was 'buying fuel' (15.0%).
 - Two-thirds of respondents stated that there was 'nothing' that they disliked about Church Langley neighbourhood centre — however 8.6% stated that parking could be improved; 6.1% stated there was a poor layout, and 3.9% stated that there was poor access by car. These factors combined suggest there may be a need to improve the layout and navigability of the centre. These points are also reflected in the responses to how respondents would like to see the centre improved — 13.8% stated more car parking should be provided, and 9.3% stated improvements to access to the centre should be provided.
- 5.42 Overall we are satisfied that Church Langley displays positive signs of vitality and viability. Whilst being catered towards car-based visits, the area surrounding the Tesco store was observed to be tidy and well-maintained, although the layout of the centre means accessing some of the other facilities in the centre (e.g. the Brewers Fayre) requires crossing the car park, and the household survey has confirmed that issues to do with access and car parking are of concern to some users of the centre.

Staple Tye neighbourhood centre — summary health check

- 5.43 Staple Tye neighbourhood centre is a purpose-built, relatively modern neighbourhood centre. The centre is smaller in terms of number of units but appears very popular and well used. The centre is anchored by large Lidl and Poundland stores at either end of the centre. Other retailers include Martin, Betfred, pharmacy, takeaway, Subway, KFC, Papa

Johns, a bakery, off licence, cycle store, and a branch of McDonalds. The number of national retailers present in the centre (as a proportion of the total retail offer) is unusually high, and this is likely to help contribute to the high levels of footfall observed during our visits to the centre. There are no cafes located within the centre, however, and the centre also has a narrower range of non-food and services uses than some other centres — for example there are no banks, building societies, or hair & beauty salons. However the units are modern and well-sized, and therefore likely to be attractive to a wide range of end-occupiers.

- 5.44 There is a skewing of the offer towards fast food and takeaway outlets and further uses of this nature should be resisted if possible to protect and enhance the diversity of uses of the centre. There are other, non-retail uses within the centre — for example the library — and there is potential to further integrate the library and community uses with the wider retail offer of the centre.
- 5.45 The car park was virtually full over the lunchtime period; it is more dominated by the car than most other centres (with the exception of Church Langley). In terms of public transport accessibility, it was observed that the main bus stops are on the periphery of the centre; the bus stops/shelters are in noticeably poor condition, with limited timetabling information. We would expect that the majority of visits to the centre are undertaken by car or on foot.
- 5.46 The centre appears well-used by local residents with a reasonably good range of uses, and strong ‘anchor’ stores in the form of Lidl and Poundland. Whilst there are qualitative gaps in the offer of the centre and a number of areas for potential improvement, it generally displays positive signs of vitality and viability.
- 5.47 The household survey responses identified that:
- Users of the centre were a mixture of weekly visitors (30.1% of respondents) and more frequent visitors (14.2% visit 5-6 times a week; 9.6% visit four times a week).
 - Almost half of all users of the centre visit for food shopping (47.4%) and 28.8% visit for non-food shopping. No other use attracts a response rate of more than 10%.
 - In terms of what respondents liked about the centre, a number of positive factors were identified: 54.8% of responses stated proximity to home; 18.8% of respondents stated the availability of free parking; 18.1% stated the ease of parking; 10.1% stated the good foodstores (i.e. Lidl) and 9.8% stated the good range of non-food shops. The presence of Lidl in the centre was specifically mentioned as an asset by 9.2% of respondents.
 - In terms of what respondents disliked about the centre, overall levels of satisfaction are moderately high — 58.1% of respondents state there is nothing they dislike about the centre. Reflecting a concern set out in our health check assessment above, 11.3% of respondents consider there to be too many fast food/takeaway shops, whilst 14.9% of respondents consider there to be a lack of parking.
 - Parking is also the main area where respondents would like to see improvements made — 16.2% of respondents would like to see more car parking, and 10.2% would like to see the provision of larger / easier car parking spaces.
 - Over 75% of users of the centre spend under an hour visiting the centre, which reflects the centre’s role and function as a neighbourhood centre.

Summary

This section has set out a ‘health check’ assessment of Harlow town centre and the network of neighbourhood centres in the District. Our assessment has focussed Harlow ‘town centre’ (as defined in the Adopted Replacement Harlow Local Plan, July 2006) of Harlow, alongside the neighbourhood centres of The Stow, Church Langley, Staple Tye, and Bush Fair. Our assessment of each centre is based on the ‘vitality and viability’ indicators for assessing the ‘health’ of a town centre as set out in the National Planning Practice Guidance (NPPG),

Harlow town centre continues to perform reasonably well. The diversity of uses is good, if slightly orientated towards the lower/value end of the market. The town centre includes foodstores capable of meeting bulk shopping and top-up shopping (Asda and Tesco Metro respectively), alongside a range of small branches of fashion retailers in the Water Gardens; stores such as Wilko, HMV and Argos in the Harvey Centre, and a large branch of Primark on Broad Walk. The recent closure of the BHS store leaves the town centre without a department store, and this represents a qualitative gap in the offer of the centre. The closure of Marks & Spencer is a further recent unfortunate loss for the town centre, although positively this site has been quickly redeveloped.

The town centre has recently benefited from the introduction of an enhanced leisure offer as a result of the redevelopment of the upper floor of the Harvey Centre to include a new Cineworld cinema and a number of restaurants. Other investment is

also taking place in the Harvey Centre with the redevelopment of the Little Walk area to provide larger-format retail units, as well as the sub-division of the former Marks & Spencer store to provide eight retail units. These all represent positive signs of investment in the town centre.

One area of concern which does need to be closely monitored in future years is the performance of prime (zone A) rents in the centre, which have decreased from £21 per sq.ft to £12 per sq.ft in the space of four years — the recent investment in the centre mentioned above will hopefully assist in stabilising this.

Previous retail studies undertaken on behalf of the Council have identified that the Town Centre North area is struggling for vitality and viability and this remains the case. The vacancy rate in this part of the centre is particularly high and, with the exception of the market, there is no footfall-generating activity in the area.

The environmental quality is, in the context of Harlow's nature as a New Town, adequate, although there is clear potential for 'softening' of the visual appearance and taking a more uniform approach to public realm.

The Neighbourhood Centres perform a more localised role and function, reflective of their more limited retail offer which is orientated towards meeting day-to-day shopping needs. The vitality and viability of these centres is mostly good, with low levels of vacancy and a reasonable range of uses, although all have areas for improvement which would deliver further enhancements to their vitality and viability.

6 SURVEY AREA, POPULATION & EXPENDITURE GROWTH

In this section, we introduce the key inputs which form the basis of our assessment of the 'need' for new comparison and convenience goods retail floorspace for the Borough. The calculation of 'need' is a technical exercise which is derived from considering three key factors: where residents of the survey area are currently undertaking their shopping; how much population growth is expected to come forward in the survey area; and how much spending on convenience and comparison goods will increase, having regard to economic forecasts and other factors such as online shopping. We introduce these inputs below, and the findings are subsequently set out in Section 7.

The findings of this section should be read in association with the capacity tabulations at Appendix I (for comparison goods) and Appendix II (for convenience goods) in Volume 2.

Calculation of quantitative 'need'

- 6.1 The 'need' for new floorspace is calculated through a conventional and widely-accepted step-by-step methodology, consistent with best practice, which draws upon the findings of the household telephone survey of shopping patterns which has been undertaken in support of this study (as previously discussed) to model the current flows of expenditure (i.e. spending in £m) to each retail destination within the survey area, and those competing centres in the surrounding area. The process for calculating quantitative 'need' is essentially unchanged from that Council's previous evidence base studies, and is summarised in the flow diagram on the following page.

Stages of a quantitative need assessment



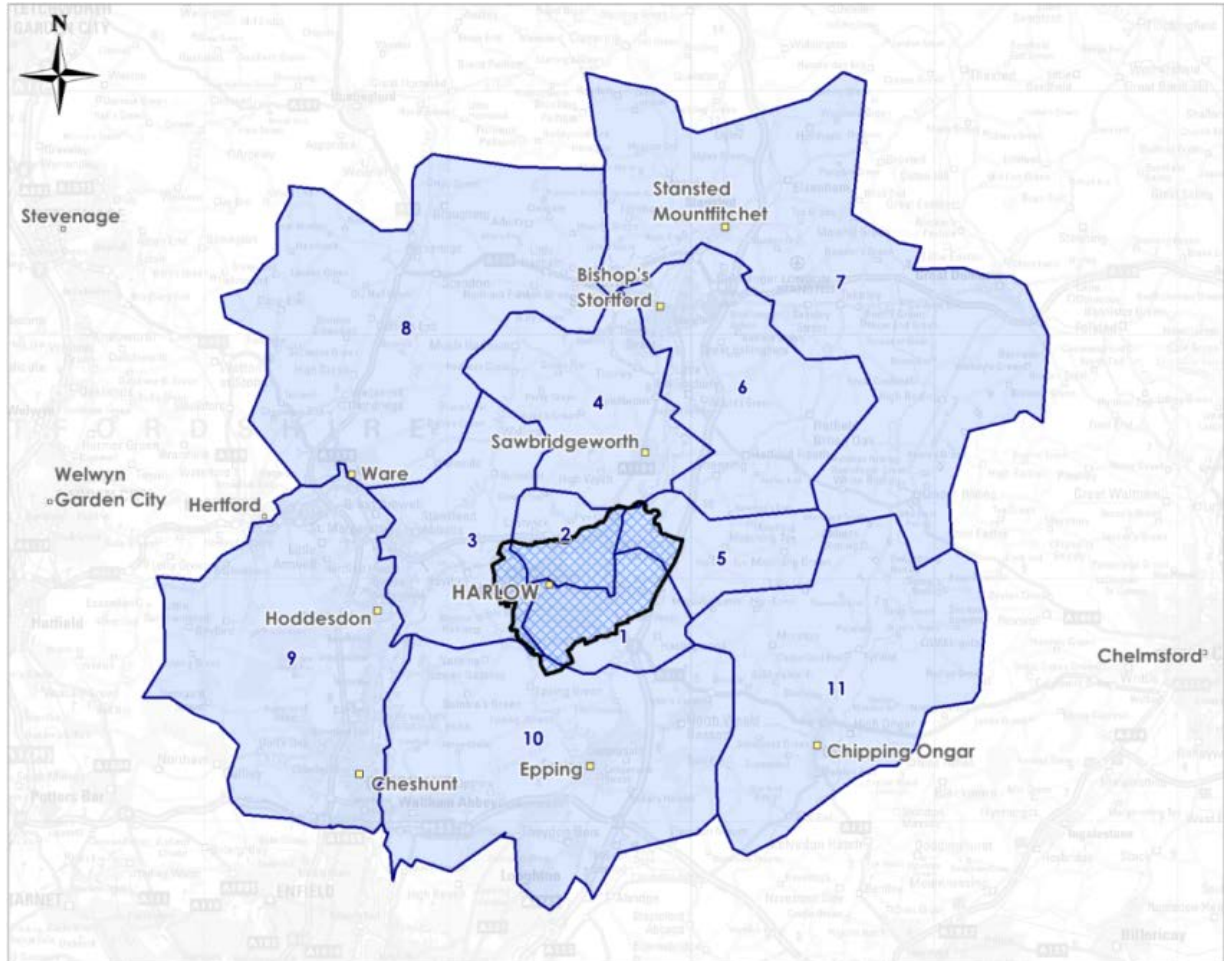
Survey Area and Household Survey

6.2 As noted above, and highlighted in previous sections of this report, in order to determine the 'need' for new floorspace a household telephone survey is required to establish the current shopping patterns of residents. In order to determine this, we have established a 'survey area', which covers Harlow District in its entirety. Due to the tightly-defined nature of the administrative boundaries of the District, the survey area extends into parts of neighbouring authorities such as Uttlesford, Epping Forest, Broxbourne and East Hertfordshire, as residents in these areas may also look towards facilities in Harlow for their shopping needs. A total of 1,100 household surveys were undertaken by NEMS Market Research in

spring 2016. In order to enable changes in shopping patterns to be analysed, we have retained the same overall survey area as used in the Council’s previous retail evidence base studies. The survey area used is shown in **Figure 6.1**.

- 6.3 As shown in Figure 6.1, the survey area is split into eleven zones, to enable differences in patterns of shopping across the survey area to be accurately captured. The Harlow District boundary is also shown on Figure 6.1, and it can be seen that the District falls mostly within zones 1 and 2, with outlying parts of the District extending into zones 3 and 5. Other centres in the survey area include Bishop’s Stortford (zone 4), Cheshunt/Waltham Cross (zone 9), Hoddesdon (zone 9) and Epping (zone 10). Hertford falls on the boundary of the survey area with some parts of the urban area of Hertford extend into zone 9. The boundaries of the 11 survey zones are also unchanged from the Council’s previous evidence base studies.

Figure 6.1: Survey area



Estimates of Population in the Survey Area

- 6.4 Based on estimates of population provided by Experian, the current (2016) population of the survey area is 399,689 persons. We understand that there remains a degree of uncertainty over the levels of housing growth which are expected to come forward in and surrounding the Harlow urban area over the course of the Council’s new Local Plan period. We have, therefore, based on information provided by the Council, tested three levels of housing growth – a ‘lower’, ‘middle’ and ‘upper’ forecast, which plan for the following levels of growth in the Harlow urban area (**Table 6.1**). Some of the growth is expected to be accommodated on land which falls within East Hertfordshire and Epping Forest districts.

Table 6.1: Estimated housing development under strategic growth scenarios

	Lower growth	Middle growth (baseline scenario)	High growth
Total new dwellings 2021-36	10,500	14,150	17,650
Annual new dwellings 2021-36	700	943	1,177
Total population growth 2021-36*	24,150	32,535	40,605
Annual population growth 2021-36*	1,610	2,169	2,707

Source: Harlow Council / Nathaniel Lichfield & Partners. *assumes ratio of 2.3 persons per dwelling.

- 6.5 The ‘middle’ growth level — which assumes the development of 14,150 dwellings in and around the Harlow urban area — has been used as the ‘baseline’ population growth forecast for the purposes of our quantitative need assessment. The ‘lower’ and ‘upper’ growth levels are tested as alternative scenarios. In each instance, we have assumed that growth will come forward in the period 2021-2033.
- 6.6 The Council have advised that residential growth is expected to come forward in the form of a number of strategic allocations on the periphery of the existing Harlow urban area. The potential locations for growth and their corresponding survey zones are summarised in **Table 6.2**. We have used the assumptions shown in Table 6.2 to determine the amount of housing growth, and therefore population growth, which we expect to come forward in each of the survey zones which cover the Harlow urban area (i.e. zones 1, 2, 3 and 5).

Table 6.2: Estimated population growth by survey zone for strategic growth locations

Growth location	LPA	Lower growth housing growth (total growth 2021-36)	Middle growth housing growth (total growth 2021-36)	High growth Housing growth (total growth 2021-36)	Zonal allocation
Completions/ permissions/ windfalls	Harlow	4,511	4,511	4,511	Zones 1 and 2 (50% each)
Urban brownfield land	Harlow	1,389	1,389	1,389	Zones 1 and 2 (50% each)
Greenfield (East of Harlow)	Harlow	2,000	2,000	2,000	Zone 5
Harlow fringe (Gliston)	East Hertfordshire	1,250	2,750	4,350	Zone 2
Latton Priory	Epping Forest	350 – 1,350	1,250	2000	Zone 1
West Sumners	Epping Forest	0 – 1,000	1,000	1,100	Zone 3
West Katherines	Epping Forest	0	750	800	Zone 3
East of Harlow	Epping Forest	0	500	1,500	Zone 5
Total	-	10,500	14,150	17,650	-

Source: Harlow Council / Nathaniel Lichfield & Partners

- 6.7 Table 1 of Appendix I and Appendix II show the population growth which we expect to come forward under the baseline / middle growth scenario. The tables show that we have factored in the potential housing growth in the Harlow urban area from 2021 onwards. For the period 2016-2021, we have used population projections provided by Experian. For those zones which fall outside the Harlow urban area (i.e. zone 4 and zones 6-11 inclusive), we also use Experian population projections for the remainder of the study period, i.e. for the period 2021-36.

6.8 As noted above, Table 1 of Appendix I/II shows that the current population of the survey area (at 2016) is 399,689 persons. Based on the scenarios we have tested:

- Under the baseline / medium population growth scenario, the population of the survey area increases to 450,003 persons by 2026, and 485,347 persons by 2033.
- Under the low population growth scenario, the population of the survey area increases to 447,205 persons by 2026, and 478,631 persons by 2033.
- Under the high population growth scenario, the population of the survey area increases to 452,687 persons by 2026, and 491,787 persons by 2033.

Available Expenditure in the Survey Area

6.9 Experian identify a ‘per capita’ spend on comparison and convenience goods on a zone by zone basis, and these are shown in Table 2 of Appendix I for comparison goods, and Table 2 of Appendix II for convenience goods.

- comparison goods per head spend ranges considerably across the survey area, from £2,843 per person in zone 2 (Harlow North) to £4,468 per person in zone 4 (Sawbridgeworth). The average comparison goods spend per head across the survey area is £3,857, which is above the UK average comparison goods spend of £3,157 per person (2016).
- convenience goods per head spend ranges from £1,965 per person in zone 2 (Harlow North) to £2,255 in zone 8 (Ware), with an average spend per head of £2,161 per person. The average spend per person across the survey area is also above (albeit only slightly) the UK average convenience goods spend per head of £2,115 (all figures 2016 in 2014 prices).

6.10 It is expected that spend per head on comparison and convenience goods will increase over the course of the study period. Therefore, we apply an annual growth rate to the 2014 baseline figures (as summarised above), which reflects expenditure growth rate projections set out in Experian’s Retail Briefing Note 14 (November 2016), as summarised in **Table 6.3**.

Table 6.3: Expenditure growth rates per annum

Year	Comparison goods expenditure growth per annum (%)	Convenience goods expenditure growth per annum (%)
2014-15*	7.20%	-1.7%
2015-16*	4.60%	-1.1%
2016-17	3.30%	0.0%
2017-18	1.40%	-0.2%
2018-19	1.00%	-0.9%
2019-23	3.00%	0.0%
2023-33	3.20%	+0.1%

Source: Experian Retail Planner Briefing Note 14 (November 2016)

*Growth rates for 2014-16 included because 2014 is the base year of Experian population and per capita expenditure forecasts

6.11 The figures set out in Table 2 of Appendix I and II have been discounted to include allowance for ‘special forms of trading’ (SFT), such as online shopping. Experian forecast that this currently (2016) accounts for 13.2% of comparison goods spending, and 3.0% of convenience goods spending, and expect this to increase over the course of the study period to 16.4% for comparison goods by 2033, and 5.1% for convenience goods by 2033⁵. Table 2 of Appendix I and Appendix II summarise the ‘with’ and ‘without’ SFT expenditure figures, and also show the deductions we have made for SFT over the duration of the study period.

6.12 By applying the population forecasts to the per capita expenditure forecasts, we can gain an understanding of the total amount of spending on comparison and convenience goods which is currently available to residents of the

⁵ Experian Retail Planner 14, November 2016, Figure 5

survey area, and how much this is expected to increase over the course of the study period. Under the 'baseline' population scenario the following levels of expenditure growth are expected to come forward:

- There is currently £1,327.4m of comparison goods expenditure available to residents of the survey area. This is expected to increase to £2,499.2m by the end of the study period in 2033, a growth in comparison goods spending of £1,171.8m.
- There is currently £832.3m of convenience goods expenditure available to residents of the survey area, which is expected to increase to £977.7m by the end of the study period in 2033, a growth in convenience goods spending of £145.4m.

Shopping patterns in the Survey Area

- 6.13 The household telephone survey results identify shopping habits of households for both convenience and comparison goods, as well as commercial leisure spending (which we discuss separately in Section 10 of this report). For convenience goods, the household telephone survey included questions on 'main food' and 'top-up food' shopping. The results of the two types of food expenditure were then merged through the application of a weight which reflects the estimated proportion of expenditure accounted for by each goods type (70% 'main' food / 30% 'top-up' food⁶). This forms a 'composite' pattern of convenience spending, expressed as a market share for each destination centre or foodstore for each survey zone.
- 6.14 For comparison goods, the household telephone survey included questions on where respondents normally undertake shopping for the following types of comparison goods shopping:
- Clothing and footwear;
 - Furniture, floor coverings and household textiles;
 - DIY and decorating goods;
 - Domestic appliances;
 - Audio-visual equipment;
 - Personal and medical goods; and
 - Recreational and luxury goods.
- 6.15 Shopping patterns for each of these types of comparison goods are then combined to produce a 'composite' set of comparison goods shopping patterns, using weighted averages of the household survey responses for each goods type based on the proportion of personal spending ('expenditure per capita') available to residents in the survey area.

Comparison goods shopping patterns

- 6.16 Shopping patterns derived from the household telephone survey allow us to calculate the amount of comparison goods expenditure which each centre within and surrounding the survey area which forms the basis of our assessment. This indicator is a good reflection of both the strength of the retail offer in a centre, as well as its accessibility, and overall quality of experience. The total amount of expenditure retained within a survey area is known as its 'retention rate'. **Table 6.4** shows the amount of comparison goods expenditure retained by centres in Harlow District and the amount which is spent at other destinations within and surrounding the survey area.

⁶ Based on our experience elsewhere, this represents a suitable split between 'main' and 'top up' food shopping.

Table 6.4: Comparison goods expenditure retention in Harlow District

	£m	% of total
Total amount of comparison goods spend available to survey area (2016), of which:	1,327.4	100.0%
— Comparison goods trade draw to centres in Harlow District (e.g. town centres, neighbourhood centres, out-of-centre and non-food floorspace in foodstores)	556.7	41.9%
— Comparison goods trade draw to other survey area centres (e.g. Bishop's Stortford, Brookfield, Epping)	459.4	34.6%
— Comparison goods trade draw to locations outside survey area (e.g. Central London, Stratford, Chelmsford)	311.3	23.4%

Source: Table 5, Appendix I

- 6.17 Our assessment has identified that there is a total of £1,327.4m of comparison goods expenditure which is available to the survey area. Of this, Table 6.4 shows that £556.7m is retained by centres and stores in Harlow District, which is equivalent to a 'retention rate' of 41.9% — in other words just over £4 of every £10 available to residents in the survey area is spent at locations in Harlow. **Table 6.5** sets out the most popular destinations for comparison goods spending in the survey area, identifying the extent to which facilities outside the District compete for expenditure with shopping destinations in the District.

Table 6.5: Survey area comparison goods trade draw by centre

Centre	Borough	Comparison goods trade draw (£m)	% of total comparison goods expenditure available to survey area
Harlow town centre	Harlow	304.2	22.9%
Harlow retail warehousing	Harlow	224.2	16.9%
Bishop's Stortford town centre	Uttlesford	142.5	10.7%
Brookfield, Cheshunt	Broxbourne	105.6	8.0%
Hertford	East Herts'	37.1	2.8%
Lakeside	Thurrock	36.2	2.7%
Chelmsford	Chelmsford	33.7	2.5%
Epping	Epping Forest	31.4	2.4%
Central London	-	30.9	2.3%
Waltham Cross	Broxbourne	28.8	2.8%
Hoddesdon	Broxbourne	27.9	2.1%
Bishop's Stortford retail parks	Uttlesford	26.3	2.0%
Cambridge	Cambridge	25.9	2.0%

Source: Table 5, Appendix I. All comparison goods destinations claiming over 2.0% of total available comparison goods expenditure shown. Note – turnovers include non-food sales in large foodstores.

- 6.18 Table 6.5 shows that the most popular destination for comparison goods spending in the survey area is Harlow town centre, which draws £304.2m of comparison goods spending from the survey area, equivalent to 22.9% of total available comparison good expenditure. Table 6.6 also shows the significant role which the retail parks in Harlow have over comparison goods shopping, drawing a further £224.2m of comparison goods spending. The retail parks in Harlow therefore provide significant competition to the town centre, and only draw £80.0m less in comparison goods spending than the combined turnover of all comparison goods retailers in Harlow town centre.

6.19 Elsewhere in the survey area, Table 6.5 shows that the key competing destinations for comparison goods spending are Bishop’s Stortford town centre, which draws £142.5m of comparison goods spending, and Brookfield in Cheshunt, which draws £105.6m of comparison goods spending. Beyond this is a ‘second tier’ of destinations which each attract between £25.9m and £37.1m of comparison goods spending, including Hertford, Lakeside, Chelmsford, Central London, Waltham Cross, Hoddesdon and Cambridge. Other destinations attract lower levels of comparison goods spend — including Stratford, which as we have identified previously has a relatively limited influence over shopping patterns of residents in the survey area, drawing £17.2m of comparison goods spend.

Convenience goods shopping patterns

- 6.20 Convenience goods shopping is a more localised activity, and people are generally less willing to travel significant distances to undertake shopping for food goods. The main centres within the survey area, such as Harlow, Bishop’s Stortford, Cheshunt, Ware and so on, each have a network of both larger and smaller-format supermarkets which enable most residents’ shopping needs to be met at the local level. The leakage of expenditure from the survey area which takes place is to destinations on the very edge – but just outside – the boundaries of the survey area, such as Loughton.
- 6.21 Our assessment has identified that there is £832.3m of convenience goods expenditure available to residents in the survey area: of this £208.2m (25.0%) is spent at stores in Harlow District; £533.2m (64.1%) is spent at stores elsewhere in the survey area, and £79.1m (9.5%) is spent at stores outside the survey area.
- 6.22 Most parts of Harlow are well provided for by foodstores, with a combination of large and smaller-format town centre stores, out-of-town supermarkets, and foodstores of varying sizes also typically act as the ‘anchor’ store to the neighbourhood centres. Our qualitative assessment has identified that some of the neighbourhood centres (e.g. The Stow) would benefit from a larger-format foodstore and this in turn would benefit the wider vitality and viability of the centre as a whole.
- 6.23 **Table 6.6** summarises the most popular foodstores in the District, based on turnover derived from the survey area. It shows the Tesco store which anchors Church Langley neighbourhood centre to be the most popular foodstore in the District, attracting a convenience goods turnover of £46.2m. Behind this, the Tesco store at East Road, the Sainsbury’s at Fifth Allende Avenue, and the Asda store in Harlow town centre all draw similar turnovers (between £32.0m and £35.8m) from the survey area.

Table 6.6: Turnover of main foodstores in Harlow District

Foodstore	Turnover from survey area (£m)	Sequential location (in/ edge/ out-of-centre)
Tesco, Church Langley	46.2	In-centre
Tesco, East Road, Harlow	35.8	Out-of-centre
Sainsbury’s, Fifth Allende Avenue	33.1	Out-of-centre
Asda, Water Gardens	32.0	In-centre
Aldi, Fifth Avenue	17.8	Out-of-centre
Lidl, Staple Tye	11.5	Edge-of-centre

Source: Table 5, Appendix II. All foodstores with a turnover from the survey area in excess of £10.0m shown.

Other inputs into the quantitative need assessment

Sales Efficiency

6.24 It is also necessary to factor in changes in respect of ‘sales efficiencies’. These represent the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (such as rents, rates and service chargers) by increasing their average sales densities. The application of a turnover ‘efficiency’ growth rate is a standard approach used in retail capacity studies. Guidance on sales efficiencies is set out in Experian’s Retail Planner Briefing Note 14 (November 2016), and for the purposes of our capacity modelling we adopt the following annual sales efficiency rates, which are held throughout the duration of the study period to 2033.

- Comparison goods: 1.4%, per annum
- Convenience goods: 0.3%, per annum

Floorspace Data

- 6.25 The comparison and convenience goods floorspace data which we incorporate into our model has been drawn from a range of data sources, including the Institute of Grocery Distribution (IGD), Experian Goad, the Trevor Wood Retail Warehouse Database, and the Council's own planning application records. Our floorspace assumptions for foodstores make allowance for a proportion of the sales area of the foodstore to be used for the sale of comparison goods (in supermarkets, this may include books, stationery, home entertainment, small electrical items, and so on).

Summary

In this section we have set out our approach to defining the survey area for the household telephone survey of shopping patterns which underpins the quantitative need forecasts this study sets out. We have set out the methodology we have used in our assessment of quantitative 'need'.

We also set out our approach to calculating the future population growth which is expected to come forward in the survey area. For those zones which cover the Harlow urban area, we have tested three potential housing growth scenarios, which reflects the current uncertainty over the precise level of, and location of, housing growth which the Council expects to come forward. These are referred to as the 'high', 'medium' and 'low' growth scenarios. We use the 'medium' growth scenario as the 'baseline' for the purposes of the quantitative need forecasts set out in the following section.

There is currently (at 2016) £1,327.4m of comparison goods expenditure available to residents in the survey area. Of this, £556.7m (41.9%) is spent at locations in Harlow District, including £304.2m in Harlow town centre and £224.2m at retail parks / non-food floorspace in foodstores. The household survey results confirm that the retail parks in Harlow directly compete with the town centre for comparison goods spending.

There is currently (2016) £832.3m of convenience goods expenditure available to residents of the survey area; of this £208.2m is spent at stores in Harlow. The most popular destinations for convenience goods shopping in Harlow are the two Tesco stores at Church Langley and East Road, which draw £46.2m and £35.8m of convenience goods spending respectively.

7 QUANTITATIVE RETAIL CAPACITY FORECASTS

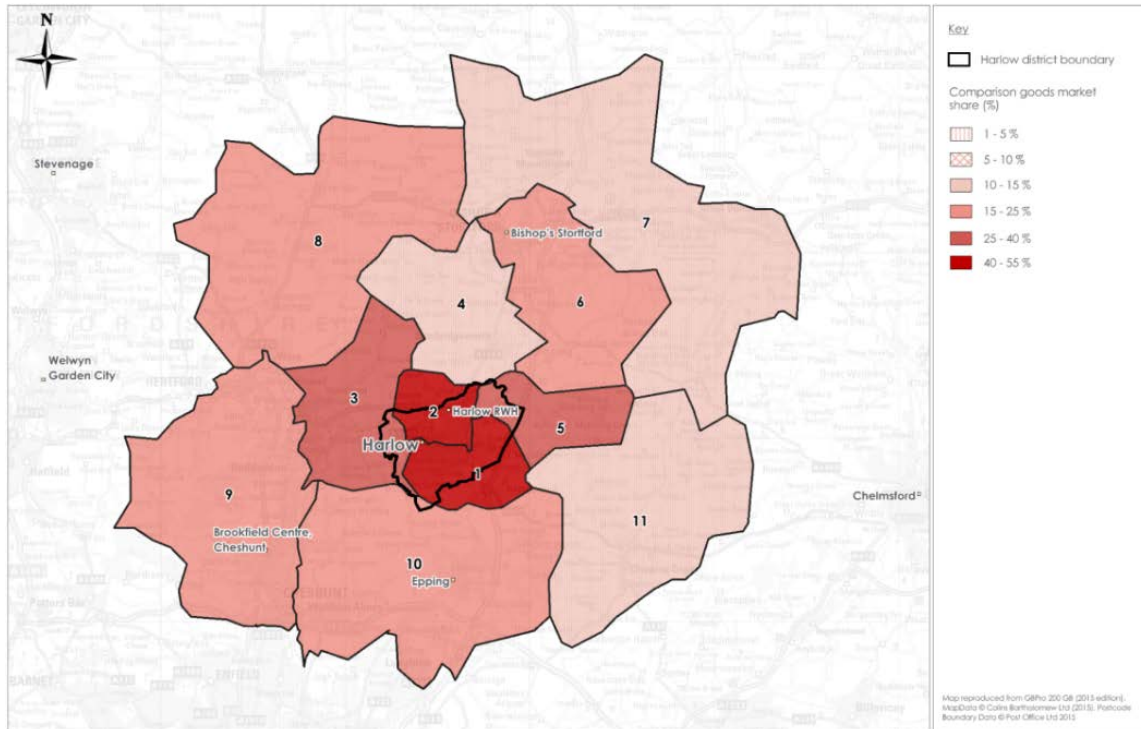
In the previous section we have set out the key inputs into our quantitative ‘need’ assessment; in this section we build on these key inputs to identify the quantitative capacity for comparison goods (non-food) and convenience goods (food) floorspace for the District, for the new Local Plan period to 2033. For both sets of forecasts, we identify a range of capacity scenarios, based on the potential housing growth scenarios which could come forward (as discussed in the previous section). The discussion in this section should be read in conjunction with the data tables set out at Appendix I (for comparison goods) and Appendix II (for convenience goods) in this study.

Comparison goods shopping patterns by location

Harlow town centre

- 7.1 Harlow town centre has, as would be expected, the highest comparison goods turnover of any centre in the survey area, drawing a comparison goods turnover of £304.2m from the survey area, equivalent to almost a quarter (22.9%) of the comparison goods expenditure available to the survey area. The household survey results identify that Harlow town centre’s principle competition for expenditure is from the retail parks/warehousing along Edinburgh Way, which draws a further £224.2m of spending (16.9% of total comparison goods expenditure).
- 7.2 **Figure 7.1** shows the parts of the survey area from where Harlow draws its market share. Positively, it shows that Harlow town centre draws a market share from each of the 11 survey zones which comprises the survey area, and from each of these zones the market share is over 10%. The darker shading denotes the strong market share, and Figure 7.1 shows that Harlow town centre’s market share from zones 1 and 2, which cover the Harlow urban area, is particularly strong. Harlow town centre draws a comparison goods market share of 47.7% from zone 1, and 47.2% from zone 2. In other words, almost £1 of every £2 in comparison goods expenditure available to residents in the Harlow urban area is spent in Harlow town centre. We consider this to be an adequate performance, in light of the loss of stores such as Marks & Spencer from the town centre in recent years. However, care will need to be taken that this market share is not eroded in future years, either by development elsewhere in Harlow (i.e. at out-of-town facilities) or further afield, particularly as it appears that the town centre has, on aggregate, lost market share in recent years (we discuss this further below).
- 7.3 As well as zones 1 and 2, Harlow town centre also draws strong market shares from zone 3 (37.2%) and zone 5 (31.9%), and therefore these zones can be considered to be Harlow’s primary catchment area.
- 7.4 Harlow town centre draws a market share of between 10% and 25% from the remaining survey zones (i.e. zone 4, plus zones 6-11 inclusive) and therefore these zones can be considered Harlow’s secondary catchment area. In these areas, Harlow faces more competition for spending from competing locations, e.g. Bishop’s Stortford (zone 6), Epping (zone 10), and Brookfield (zone 9). As we have set out previous sections of this report, the household survey area and sub-division into survey zones has remained unchanged since the Council’s previous retail capacity evidence base studies. This means it is possible to compare the findings of the current household telephone survey results with those in previous studies, to examine the extent to which shopping patterns have changed.

Figure 7.1: Harlow town centre catchment plan



Source: Table 4, Appendix I. A larger version of this plan is reproduced in Volume 2.

7.5 In **Table 7.1** we compare the market share of Harlow town centre from the results of the household telephone survey undertaken in support of the 2010 Update, and those identified in the new household telephone survey. The results show that whilst Harlow town centre has increased its market share from zone 1 (Harlow North), it has lost market share from its other three 'primary catchment area' zones, including a -6.2% decline from zone 5. Harlow town centre has also lost market share from four of the seven secondary catchment area zones, the most significant of which being an almost-halving of its market share from zone 10. Positively, it has increased its market share by between 4.7% and 4.9% from the remaining three secondary catchment area zones.

Table 7.1: Analysis of Harlow town centre comparison goods market share by zone, 2010 & 2016

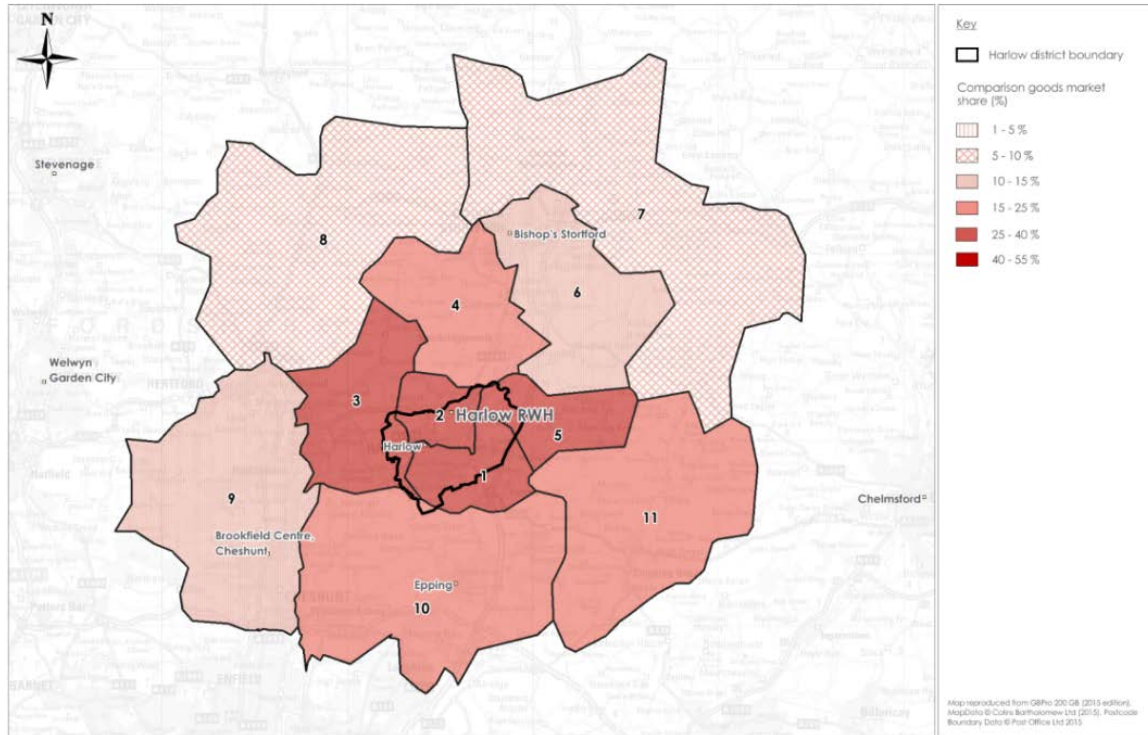
	Comparison goods market share (%) 2010	Comparison goods market share (%) 2016	Change in comparison goods market share (%) 2010 to 2016
Primary catchment area			
Zone 1	39.2%	47.7%	+8.5%
Zone 2	48.4%	47.2%	-1.2%
Zone 3	39.6%	38.3%	-1.3%
Zone 5	38.1%	31.9%	-6.2%
Secondary catchment area			
Zone 4	19.7%	14.3%	-5.4%
Zone 6	12.2%	17.1%	+4.9%
Zone 7	8.0%	12.8%	+4.8%
Zone 8	25.7%	21.6%	-4.1%
Zone 9	14.7%	19.4%	+4.7%
Zone 10	32.0%	17.3%	-14.7%
Zone 11	13.6%	12.6%	-1.0%

Source: Table 4, Appendix I (2016 data) / Harlow Retail Study 2010 Appendix 4, Table 4 (2010 data)

Harlow retail warehousing

- 7.6 As we have set out in previous sections of this study, Harlow town centre’s main competition for comparison goods expenditure comes from the concentration of retail warehousing on Edinburgh Way. In common with Harlow town centre, the retail warehousing draws a market share from across the eleven zones of the survey area, with the strongest market shares drawn from zone 2 (34.5%), zone 5 (28.4%), zone 1 (27.9%) and zone 3 (25.9%). However, the retail parks also draw market shares over 20% from both zones 4 and 11 – over 5 percentage points higher than the market share attracted to Harlow town centre from these zones, and therefore its ‘primary catchment area’ could be considered to have a greater reach than that of Harlow town centre.
- 7.7 The catchment area for Harlow’s retail warehousing is shown in **Figure 7.2**.

Figure 7.2: Harlow retail warehousing catchment plan



Source: Table 4, Appendix I. A larger version of this plan is reproduced in Volume 2.

- 7.8 In **Table 7.2** we compare the market shares attracted to Harlow’s retail warehousing by zone from the current household survey with those from the 2010 survey. This shows that the retail warehousing at Edinburgh Way has also lost market share in the last six years, with particularly noticeable declines in market share from zone 1 (where Harlow town centre has gained market share) and zone 5 within the primary catchment area, and zones 7, 8 and 11 in the secondary catchment area. The only zone from where the retail warehousing has gained market share is zone 10, and we expect that some of this gain in market share is likely to have come at the expense of Harlow town centre.

Table 7.2: Analysis of Harlow retail warehousing comparison goods market share by zone, 2010 & 2016

	Comparison goods market share (%) 2010	Comparison goods market share (%) 2016	Change in comparison goods market share (%) 2010 to 2016
Primary catchment area			
Zone 1	36.4%	27.9%	-8.5%
Zone 2	36.5%	34.5%	-2.0%
Zone 3	26.4%	25.9%	-0.5%
Zone 5	37.5%	28.4%	-9.1%
Secondary catchment area			
Zone 4	22.3%	20.9%	-1.4%
Zone 6	15.9%	14.7%	-1.2%
Zone 7	14.8%	5.5%	-9.3%
Zone 8	17.9%	9.8%	-8.1%
Zone 9	14.9%	13.8%	-1.1%
Zone 10	10.7%	15.4%	+4.7%
Zone 11	26.1%	20.3%	-5.8%

Source: Table 4, Appendix I (2016 data) / Harlow Retail Study 2010 Appendix 4, Table 4 (2010 data)

7.9 The overall picture therefore is that a lower proportion of comparison goods expenditure is spent in retail locations in Harlow than was the case at the time of the previous study. Of particular concern is that Harlow town centre is losing market share from its 'primary catchment area', and it is important to the future vitality and viability of the town centre that this loss of market share is reversed.

7.10 Table 9 of Appendix I builds on the analysis set out in Tables 7.1 and 7.2 above, and shows how the market share to each of the key comparison goods shopping destinations has changed between the 2010 survey and the 2016 survey. The headline points which can be drawn from this in respect of shopping patterns in the primary catchment area are that:

- Harlow town centre has gained 8.5% market share from zone 1, which is the exact amount by which the market share of the retail parks has reduced by. The market share of Lakeside from zone 1 has also reduced by 4.1%, and we expect that some of this is now accounted for by Westfield Stratford City;
- Conversely, Lakeside has gained a modest market share (+1.9%) from zone 2; this aside most changes in shopping patterns in this zone are relatively limited;
- Central London draws a noticeably higher market share (5.2%) from zone 3 than was the case in the 2010 survey (0.9%), at the expense of a number of other locations such as Welwyn Garden City (-3.6%) and Brookfield (-2.6%);
- Both Bishop's Stortford and Cambridge have increased their market share from zone 5.

7.11 Overall, there have been a number of subtle changes in shopping patterns which can be observed from across the survey area, with several centres gaining or losing modest market shares from the different survey zones, and, aside from those described above, there are no clear-cut cases of where a centre's market share has noticeably altered. However, as mentioned above, the overall consequence of these changes has been a reduction in the market share, and therefore proportion of comparison goods expenditure, retained in Harlow.

Harlow neighbourhood centres

7.12 The neighbourhood centres do not, for the most part, act as significant comparison goods shopping destinations, reflecting their role and function as serving more of a day-to-day shopping function. However, the household survey results do show that two neighbourhood centres attract some comparison goods spending – Church Langley and Old Harlow. In the case of Church Langley, this is largely on account of the presence of the large Tesco store which anchors the centre, and draws £11.4m of non-food spending from the survey area. Old Harlow also performs well, drawing £8.8m of comparison goods spending from the survey area.

Comparison goods trading performance

- 7.13 Using the market shares attributed to each centre from the household telephone survey, and the baseline estimates of expenditure available to the survey area (as summarised in the previous section), we are able to calculate the comparison goods turnover of each of the town and neighbourhood centres in the District, as well as the competing out-of-town destinations. This is a useful exercise because it shows the extent to which a centre is trading in line with expectations.
- 7.14 Table 8 of Appendix I shows that, on aggregate, comparison goods floorspace in the District is currently (2016) trading at £6,223 per sq.m — this is an aggregate trading performance, based on the turnover of the town, neighbourhood centres and out-of-centre floorspace, as well as comparison goods floorspace within larger foodstores. **Table 7.3** shows the trading performance of Harlow town centre and the retail parks; we have not included the performance of the neighbourhood centres because, as noted above, the majority of these do not attract a significant comparison goods turnover.

Table 7.3: Trading performance of centres in Harlow

	Comparison goods turnover from survey area (£m)	Estimated comparison goods floorspace (sq.m net)	Turnover per sq.m (£)
Harlow town centre	304.2	36,939	8,236
Harlow retail warehousing	224.2	51,679	4,339

Source: Table 6, Table 8, Appendix I

- 7.15 Table 7.3 shows that Harlow town centre is achieving a comparison goods sales density in the region of £8,200 per sq.m, and we consider this to represent a relatively strong performance when considering the current composition and retail offer in the centre. There is potential for this sales density to be improved over the course of the Local Plan period, but this will require improvements to the quality of the retail offer, the development of more larger-format units, and so on.
- 7.16 The sales density of the retail warehousing is in the region of £4,300 per sq.m, which is also in line with expectations. The sales density of the retail warehousing is higher than it would be expected if all of the retail warehousing was ‘bulky goods’ and reflects the fact that some of the out-of-town floorspace is used for the sale of ‘high street’ comparison goods.

Identification of comparison goods capacity

- 7.17 Having undertaken the above assessment of trading performance, we are in a position to establish the quantum of new comparison goods floorspace which the Council should seek to plan for over the study period to 2033. In assessing the capacity for future comparison goods floorspace, we have assumed that existing comparison goods floorspace stock across the District will improve its sales efficiency (i.e. its turnover per sq.m) over the course of the study period. We have assumed that new comparison goods floorspace would achieve a sales density in the region of £7,500 per sq.m, which is considered to be a reasonable proxy for trading performance of new comparison goods floorspace, and one which is reflective of the current relatively strong performance of the existing comparison goods floorspace in Harlow town centre.
- 7.18 In identifying capacity, it is important to note that forecasts become increasingly open to margins of error over time, and accordingly should be refreshed throughout the Council’s Local Plan period. The capacity figures identified for the period beyond 2026 should be considered indicative only (these are shown italicised in the summary capacity tables set out in Appendix I and in the remainder of this section).
- 7.19 In identifying future retail capacity it is also necessary to take into account ‘commitments’ for new retail floorspace, which will act as ‘claims’ on the amount of comparison goods spending which is available to support new floorspace. The Council have advised us of two extant planning permissions for new ‘town centre’ uses development in the District, both of which are related to the ongoing redevelopment of the Harvey Centre, as follows:
- Change of use from class A1 and class B1 floorspace to class A3 and D2 floorspace (development of new cinema and restaurants on first floor of Harvey Centre) (application ref HW/PL/12/00143);

- Subdivision of existing class A1 floorspace into four units, Broad Walk (one class A1, one class A2, two class A3) (application ref HW/PL/16/00004)

7.20 The Council have advised that both applications will result in a net reduction in class A1 floorspace, and accordingly they are not considered a ‘commitment’ for the purpose of our comparison goods capacity forecasts. Whilst the implementation of these permissions will therefore result in an overall net reduction in comparison goods floorspace in the town centre, the floorspace being lost is generally of poor quality and unlikely to be making a significant contribution to the overall comparison goods turnover of the town centre.

7.21 The ‘baseline’ comparison goods capacity for the District is summarised in Table 7.4. As set out above, this ‘baseline’ forecast is based on the assumption that the ‘medium’ growth scenario will come forward in respect of the level of additional housing planned to come forward within and surrounding Harlow. Table 7.4 shows that the Council will need to plan for, under the ‘baseline’ scenario, **up to 17,200 sq.m net additional comparison goods floorspace by 2026, and indicatively up to 37,900 sq.m net additional comparison goods floorspace by 2033.**

Table 7.4: Comparison goods floorspace capacity, Harlow District (medium strategic growth/‘baseline’ scenario)

Year	Comparison goods floorspace capacity – MEDIUM GROWTH (‘baseline’) (sq.m net)
2021	4,900
2026	17,200
2031	31,600*
2033	37,900*

Source: Table 8, Appendix I

*Indicative only, subject to review. Figures are cumulative. Scenarios modelled from 2021 onwards.

Comparison goods scenario testing

7.22 We have also tested the comparison goods capacity which would arise in the event of a ‘low growth’ or ‘high growth’ option coming forward. The population growth which is expected to come forward in each of the survey zones under these scenarios is shown in Table B1 and Table C1 of Appendix I (for ‘low growth’ and ‘high growth’ scenarios respectively), and the corresponding comparison goods floorspace capacity requirements are shown at Table B8 and Table C8 of Appendix I (again, for ‘low growth’ and ‘high growth’ scenarios respectively).

7.23 The findings of this exercise are shown in Table 7.5 and show that:

- If the ‘low growth’ scenario is followed, the overall comparison goods capacity requirement reduces to 16,300 sq.m net by 2026 and indicatively 35,500 sq.m net by 2033.
- If the ‘high growth’ scenario is followed, the overall comparison goods capacity requirement increases to 18,100 sq.m net by 2026 and indicatively 40,200 sq.m net by 2033.

7.24 These therefore represent the ‘upper’ and ‘lower’ ranges of comparison goods floorspace capacity required for the District: the Council will need to plan for **between 16,300 and 18,100 sq.m net additional comparison goods floorspace by 2026**, increasing to **indicatively between 35,500 and 40,200 sq.m net additional comparison goods floorspace by 2033**. There are no changes from the ‘baseline’ requirement at 2021, as we have assumed all of the Council’s planned strategic housing growth will come forward after this point.

Table 7.5: Comparison goods floorspace capacity, Harlow District (alternative strategic growth scenarios)

Year	Comparison goods floorspace capacity – LOW GROWTH (sq.m net)	Comparison goods floorspace capacity – MEDIUM GROWTH (sq.m net)	Comparison goods floorspace capacity – HIGH GROWTH (sq.m net)
2021	4,900	4,900	4,900
2026	16,300	17,200	18,100
2031	29,700*	31,600*	33,500*
2033	35,500*	37,900*	40,200*

Source: Table 8, Table B8, Table C8, Appendix I

*Indicative only, subject to review. Figures are cumulative. Scenarios modelled from 2021 onwards.

Convenience goods shopping patterns

- 7.25 In the remainder of this section we set out the capacity for additional convenience goods floorspace in Harlow District over the study period to 2033. Our discussion follows the same format as for the comparison goods capacity forecasts set out above. The discussion set out below should be read in conjunction with the tabulations set out at Appendix II.
- 7.26 Table 7.6 shows the most popular convenience goods shopping patterns for each of the four zones which wholly or partially cover the Harlow urban area — zones 1, 2, 3 and 5. It shows the extent to which convenience goods shopping needs are being met within each zone, or whether residents are having to travel further afield to meet their convenience goods shopping needs. Because convenience goods shopping is generally a relatively localised activity, if residents are being forced to travel long distances for their convenience goods shopping, this can suggest a qualitative gap in the retail offer at the local level.
- 7.27 In Table 7.6, the green-shaded entries denote stores within the respective 'local' zones, and the purple-shaded stores denote stores within an adjacent survey zone.

Table 7.6: Most popular convenience goods shopping locations by zone (Harlow zones only)

	Most popular convenience goods shopping location (%)	Second-most popular convenience goods shopping location (%)	Third-most popular convenience goods shopping location (%)
Zone 1	Tesco, Church Langley (27.1%)	Asda, Water Gardens (16.8%)	Sainsbury's, Fifth Allende Av (13.0%)
Zone 2	Sainsbury's, Fifth Allende Av (20.8%)	Aldi, First Avenue (19.2%)	Tesco, East Road (18.3%)
Zone 3	Hoddesdon (all stores) (21.3%)	Asda, Water Gardens (12.4%)	Sainsbury's, Fifth Allende Av (12.1%)
Zone 5	Tesco, East Road (28.7%)	Co-Op, Old Harlow (16.6%)	Tesco, Church Langley (12.0%)

Source: Table 4, Appendix II

- 7.28 Table 7.6 confirms that convenience goods shopping patterns in the Harlow urban area are generally sustainable, and there is no evidence of the majority of residents needing to travel significant distances in order to undertake their convenience goods shopping. Zone 2 (Harlow Central / North) is best provided for in terms of foodstores, and the three most popular foodstores for residents in this zone are all contained within the zone itself. Residents in zones 1, 3 and 5 also look towards foodstores in zone to varying degrees. The Tesco store at Church Langley neighbourhood centre is the main foodstore on the southern side of Harlow, whilst the small Co-Op store in Old Harlow neighbourhood centre draws a notably high level of market share from zone 5.

Convenience goods performance assessment

- 7.29 In Tables 6 and 8 of Appendix II, we have undertaken an assessment of the trading performance of the convenience goods floorspace in the District, to establish whether the floorspace is trading in line with ‘benchmark’ levels (i.e. company averages for national operators, or typical sales densities for independent retailers). Table 8 in Appendix II shows that, on average, ‘main foodstore’ convenience goods floorspace in the District is trading at £10,278 per sq.m, which is a relatively high sales density, and one which reflects the fact that the vast majority of convenience goods shopping in the District is undertaken in large-format foodstores (i.e. Asda, Sainsbury’s, Tesco and so on).
- 7.30 In Table 6 of Appendix II we set out the trading performance of individual ‘main foodstores’, and, where data is available, other town centre convenience goods floorspace. This information is not available for the network of neighbourhood centres or hatches in Harlow. The analysis in Table 6 of Appendix II (the performance of key stores is also shown summarised in **Table 7.7**, below) shows a clear division in the performance of the foodstores in the District, with the two main foodstores in the town centre (Asda and Tesco Metro) both ‘under-trading’, and the majority of out-of-centre floorspace (plus large stores in neighbourhood centres e.g. Tesco in Church Langley) ‘over-trading’ against company ‘benchmark’ levels⁷.

Table 7.7: Summary of foodstore trading performance, Harlow District

Store	Estimated convenience goods sales area (sq.m net)	Estimated turnover per sq.m for operator (£)	‘Benchmark’ convenience goods turnover (£m)	Survey-derived convenience goods turnover (£m)	Difference between ‘benchmark’ and survey-derived convenience goods turnover (£m)
Harlow town centre main stores					
Asda, Water Gardens	2,815	13,350	37.6	32.0	-5.5
Tesco Metro	1,576	11,619	18.3	8.8	-9.5
Neighbourhood centre main stores					
Tesco, Church Langley	2,274	11,619	26.4	46.2	+19.8
Lidl, Staple Tye	866	3,524	3.1	11.5	+8.5
Co-Op, Old Harlow	207	7,283	16.	3.1	+1.4
Edge/out-of-centre main stores					
Aldi, First Avenue	941	9,704	9.1	17.8	+8.7
Sainsbury’s, Allende Av	3,221	12,181	39.2	33.1	-6.1
Tesco, East Road	2,834	11,619	32.9	35.8	+2.9

Source: Table 6, Appendix II

- 7.31 As can be seen from Table 7.7, The Tesco store at Church Langley is over-trading to the greatest extent, at +£19.8m compared to company average levels. The Lidl store at Staple Tye is over-trading by +£8.5m and the Aldi store at First Avenue is over-trading by +£8.7m.
- 7.32 The trading performance of specialist/independent retailers in Harlow town centre is showing as being below average levels (see Table 6, Appendix II). This is often because patterns of visits to these type of stores are under-reported in household survey responses compared to ‘named’ foodstores. However, when considered alongside the under-

⁷ The ‘benchmark’ turnover of a foodstore is calculated by applying the estimates sales area of the store devoted to convenience goods sales to the average turnover per sq.m of the operator of the store, sourced from Verdict (but adjusted based on our own observations where necessary).

trading of the Asda and Tesco Metro stores, it does appear that convenience goods floorspace in Harlow town centre is underperforming at present. However this is likely to reflect that these stores — particularly the Tesco Metro store — are likely to be used for ‘top up’ shopping trips, and may be under-reported in the household survey results.

Identification of convenience goods capacity

- 7.33 Having set out the population and expenditure growth expected to come forward in the convenience goods sector (section 6) and undertaken the analysis of shopping patterns (above), **Table 7.8** shows the capacity for additional convenience goods floorspace in the District under the medium strategic growth (‘baseline’) scenario.
- 7.34 As with the comparison goods capacity forecasts set out above, it is important to note that forecasts become increasingly open to margins of error over time, and should be refreshed over the Council’s Local Plan period. We therefore again advise that capacity forecasts identified for the period beyond 2026 are considered indicative. In addition, findings should be considered alongside our qualitative assessments set out earlier in this report, as low / negligible capacity does not, in itself, mean there is no ‘need’ for additional floorspace.
- 7.35 We are not aware of any ‘commitments’ for new convenience goods floorspace which need to be taken into account as part of our convenience goods capacity assessment.
- 7.36 Based on a ‘constant market share’ (i.e. assuming that current patterns of convenience goods shopping remain unchanged), **Table 7.8** shows that there is a quantitative ‘need’ for an **additional 2,900 sq.m net convenience goods floorspace for the period to 2026, increasing to (indicatively) 4,700 sq.m net by 2033.**

Table 7.8: Convenience goods floorspace capacity, Harlow District (medium strategic growth/‘baseline’ scenario)

Year	Convenience goods floorspace capacity – MEDIUM GROWTH (‘baseline’) (sq.m net)
2021	1,600
2026	2,900
2031	4,200*
2033	4,700*

Source: Table 8, Appendix II

*Indicative only, subject to review. Figures are cumulative. Scenarios modelled from 2021 onwards.

Convenience goods scenario testing

- 7.37 As with the comparison goods capacity forecasts set out above, we have undertaken ‘scenario testing’ on the convenience goods capacity forecasts shown in Table 7.8, to reflect the potential ‘lower’ or ‘higher’ levels of strategic growth which could come forward. The supporting data tabulations are provided at Tables B1/B8 and C1/C8 of Appendix II.
- 7.38 The findings of this exercise are shown in **Table 7.9** and show that:
 - If the ‘low growth’ scenario is followed, the overall convenience goods capacity requirement reduces to 2,500 sq.m net by 2026 and indicatively 3,900 sq.m net by 2033;
 - If the ‘high growth’ scenario is followed, the overall convenience goods capacity requirement increases to 3,200 sq.m net by 2026 and indicatively 5,500 sq.m net by 2033.
- 7.39 These therefore represent the ‘upper’ and ‘lower’ ranges of convenience goods floorspace capacity required for the District: the Council will need to plan for **between 2,500 and 3,200 sq.m net additional convenience goods floorspace by 2026, increasing to indicatively between 3,900 and 5,500 sq.m net additional convenience goods floorspace by 2033.** Again, it should be noted that there are no changes from the ‘baseline’ requirement at 2021, as we have assumed all of the Council’s planned strategic housing growth will come forward after this point.

Table 7.9: Convenience goods floorspace capacity, Harlow District (alternative strategic growth scenarios)

Year	Comparison goods floorspace capacity – LOW GROWTH	Convenience goods floorspace capacity – MEDIUM GROWTH ('baseline') (sq.m net)	Comparison goods floorspace capacity – HIGH GROWTH
2021	1,600	1,600	1,600
2026	2,500	2,900	3,200
2031	3,500*	4,200*	4,900*
2033	3,900*	4,700*	5,500*

Source: Table 8, Table B8, Table C8, Appendix II

*Indicative only, subject to review. Figures are cumulative. Scenarios modelled from 2021 onwards.

Summary

In this section we have set out a summary of the quantitative ‘need’ for new comparison and convenience goods floorspace in Harlow District, based on the findings of the household survey in terms of the current patterns of shopping, and our forecasts of population and expenditure growth. The findings should be read in conjunction with the quantitative tabulations set out at Appendix I and Appendix II of Volume 2 to the study.

We have also identified the current primary and secondary shopping catchment of Harlow town centre and its retail warehousing. This analysis has shown that Harlow town centre continues to draw strongly from the Harlow urban area and immediate surrounding area, but beyond this its influence as a comparison goods shopping destination becomes reduced in favour of competing locations such as Bishops Stortford.

The overall proportion of comparison goods expenditure which is being retained by centres and stores in Harlow has decreased since the Council’s previous retail study (in 2010), including a loss of market share from its primary catchment area, and it is important for the future vitality and viability of Harlow town centre that this trend is reversed moving forward.

For both comparison and convenience goods, we identify a range of floorspace requirements, based on the potential housing growth scenarios discussed in the previous section. In terms of comparison goods, it is recommended that the Council plan for between 16,300 and 18,100 sq.m net additional comparison goods floorspace by 2026, increasing to indicatively between 35,500 and 40,200 sq.m net additional comparison goods floorspace by 2033.

For convenience goods, the Council will need to plan for between 2,500 and 3,200 sq.m net additional convenience goods floorspace by 2026, increasing to indicatively between 3,900 and 5,500 sq.m net additional convenience goods floorspace by 2033, depending on the level of housing growth which comes forward.

We would advise that forecasts beyond 2026 are considered indicative, and should be subject to regular review throughout the Council’s new Local Plan period. Forecasts should also be updated if there are significant changes in the amount of housing growth which the Council anticipate will come forward in its new Local Plan period.

8 COMMERCIAL LEISURE ASSESSMENT

As our analysis in section 3 of this report has set out, leisure uses are now considered to be an integral part of what a town centre can offer to its customers. Online shopping has become a popular and, in some sectors of the retail market, the preferred method for buying goods, therefore it is becoming increasingly important for town centres to remain competitive and diversify away from the traditional image of a retail 'high street' to one where there is a good provision of leisure, entertainment and cultural activities. This will ensure the long term vitality and resilience of town centres and give people more reasons to visit a centre, as well as encourage visitors to spend longer in a centre.

- 8.1 As this section sets out, there is significant expenditure growth expected to come forward in key commercial leisure sectors such as eating out, fitness and trips to the cinema over the course of the Council's new Local Plan period, suggesting that the commercial leisure is going to remain an important component of town centres for the foreseeable future.
- 8.2 This section of the report will focus on the current provision of leisure activity uses throughout the survey area and in particular the provision in Harlow District. The analysis will reflect upon the pattern of visits to restaurant, café, cinema, entertainment venues and cultural facilities, and identify any qualitative 'gaps' in the provision of these facilities. The results are informed by the assessment of the centres undertaken by GVA and the data from the household telephone surveys produced by NEMS (further details of the survey area and approach to the household survey are set out in Section 6 of this report).

Patters of commercial leisure visits

- 8.3 Firstly, we identify the patterns of commercial leisure visits which residents in the survey area are currently undertaking, based on the findings of the household survey. The household survey asked respondents where they currently travel to when they go the cinema, visit cafés, restaurants and pubs, cultural venues such as theatres and museums, and other more specialist leisure facilities such as bowling, ice skating and children's soft play venues. We discuss these sectors below.

Restaurants

- 8.4 Visiting restaurants was stated as the most popular leisure activity; 74% of respondents stated that they visit restaurants. Our health check analysis has demonstrated that Harlow town centre is under-provided for in terms of restaurants and this is borne out in the findings of the household survey results, which shows that Harlow town centre attracts a market share of only 45.8% from zone 1 and 35.9% from zone 2, its two principal 'local' zones. A further 17.8% of residents in zone 1 and 20.0% of residents in zone 2 visit restaurants in other locations in Harlow. We consider there is scope for improvement in the market shares which Harlow town centre attracts from its local catchment.
- 8.5 Positively, however, facilities in Harlow town centre attract a market share from across the survey area. The highest market share is the aforementioned 45.8% from zone 1, but the town centre attracts a market share of over 20% from a further three zones. Across the survey area, other restaurant destinations which were popular with survey participants included Bishop's Stortford (12%), Hertford (10.7%) and Central London (8.3%).
- 8.6 As previously identified in this report, Harlow town centre has a limited provision of restaurants and many of these establishments close in the early evening. This is likely to account for the low numbers of people travelling to the town centre for this leisure activity. The Water Gardens in Harlow, in the south portion of the town centre, offers a number of family dining restaurants including Pizza Express, Frankie and Benny's, Nando's and Five Guys which help support the fairly limited evening economy in the town centre.
- 8.7 Harlow town centre has recently benefited from the opening of restaurant floorspace which has been delivered as part of the extension of the Harvey Centre, and this could potentially assist in the relatively low levels of popularity of Harlow town centre which the survey has identified improving in future years (the new restaurants were not trading at the time of the household survey). However, given the growth in spending on this type of activity which is expected to come forward in future years (as discussed below), there will remain a need for the Council to plan for additional uses of this nature over the course of the new Local Plan period.



Pizza Express restaurant in Harlow town centre

Cinema

- 8.8 Visiting the cinema was the second most popular leisure activity for residents taking part in the household survey with 66% stating that they partook in that activity. This activity was generally popular across the survey zone areas with results ranging from 37% in zone 11 and 77% in zone 9. Whether residents choose to visit facilities such as cinemas is, in part, a reflection on the proximity of and ease of access to facilities, and so the popularity of facilities such as cinemas is typically lower amongst residents of rural areas, for example.
- 8.9 At the time of the household telephone survey, Harlow only had one cinema facility, the multiplex Cineworld facility at the Queensgate Centre, located outside of Harlow town centre. The household survey results confirm this to be a popular facility, accounting for 59.5% of all cinema visits across the survey area. The Cineworld has a particularly dominant influence over patterns of cinema visits in the Harlow urban area, accounting for 90.9% of cinema visits for residents in zone 1, 93.9% of visits for residents in zone 2, 89.2% of visits for residents in zone 3, and 82.5% of residents in zone 5. This shows the Cineworld has a dominant market position in the town, and the opening of a new cinema facility in Harlow town centre in December 2016 (subsequent to the completion of the household telephone survey) will have helped to improve choice for residents – although unusually both cinemas will be run by the same operator.
- 8.10 Other popular destinations of note for residents in the survey area are the Empire Cinema, Anchor Street in Bishops Stortford (12.8% market share from across the survey area) and the Cineworld at the Southbury Leisure Centre in Enfield (9.2% market share from across the survey area), although neither of these facilities draw significant trade from the Harlow urban area itself.

Table 8.1: Most popular cinema survey destinations in survey area

Cinema facility	Visits by Household Survey Respondents (%)
Cineworld, Queensgate Centre, Edinburgh Way, Harlow	59.5%
Empire Cinema, Anchor Street, Bishop Stortford	12.8%
Cineworld, Southbury Leisure Centre, Enfield	9.2%

Source: household survey results. Note: Cineworld in Harlow town centre was not trading at the time of the household survey.

Cafes

- 8.11 63% of respondents to the household survey state that they visit cafes. Across the zones, the survey results displayed a considerable disparity in the proportion of respondents who undertook this type of activity — the lowest figure being 41.6% (zone 2), and the highest being 74.9% (zone 9). The proportions of respondents stating they visit cafes in the four Harlow survey zones (zones 1, 2, 3 and 5) were amongst the lowest of all of the survey zones, pointing to what we consider to be a qualitative shortfall in the offer of Harlow town centre in this respect. Provision of coffee shops is largely limited to Costa, Esquires Coffee and a small number of independent cafes, indicating that there is a gap in

provision of this type of use and an opportunity to create more of a café culture within the town centre. A branch of Starbucks commenced trading in the town centre towards the end of 2016.

- 8.12 In terms of other locations in the Harlow urban area, it is worth noting that Old Harlow attracts a strong market share from its local zone (zone 5), from where it attracts 27.7% of the market share. Old Harlow also draws a 7.7% market share from zone 1 and 4.7% market share from zone 2. The other neighbourhood centres have a generally limited provision of these type of uses, but Bush Fair attracts a market share of 7.9% from zone 1.

Pubs / clubs

- 8.13 The household survey results suggest that visiting pubs/clubs was the fourth most popular leisure activity for participants of the household survey, with 53% of respondents stating that they take part in this activity. The proportion of respondents undertaking these activities in the four Harlow zones (zones 1, 2, 3 and 5) was amongst the lowest of the entire survey area, possibly a reflection of the fact that Harlow town centre has a poor selection of bars and offers only one nightclub.
- 8.14 The neighbourhood centres play an important function in meeting residents' needs, particularly in respect of visiting pubs, which many prefer to participate in near to their home, rather than making a 'destination' trip to a larger town centre. So for example Old Harlow, which benefits from a number of attractive pubs on the periphery of the centre, attracts a market share of 40.1% from zone 5, and indeed this confirms the important role which these pubs contribute to the overall vitality and viability of the centre. Old Harlow also attracts a market share of 12.1% from zone 2. The other neighbourhood centre which attracts a noteworthy market share is Church Langley, which including a Brewers Fayre pub/family restaurant; this attracts a market share of 11.8% from zone 1.
- 8.15 Also of note is the influence of central London over market shares — locations in central London account for 12.7% of the market share from zone 1, and 10.0% of the market share from zone 5, for example.

Arts / cultural activities (theatres, museums, live music, art galleries)

- 8.16 According to the household survey results the fifth most popular leisure activity was arts/ cultural activities (46% of visits across all survey zones). This activity was the most popular in zone 3, zone 4 and zone 9. Of all the participants who stated that they choose to partake in art and cultural activities, the large majority (73.6%) travel to Central London (West End, Oxford Street/ Regent Street, Covent Garden). These patterns of visits are entirely to be expected; central London is easily accessible from most parts of the survey area, and its internationally-renowned range of cultural venues offer a wealth of choice which few other locations can match.
- 8.17 Positively, the results of the household survey also show that the Harlow Playhouse in Harlow town centre exerts an important influence over patterns of visits in the survey area. The Playhouse attracts over one-third of the market share from zone 1, and over one-quarter of the market share from zones 2 and 5. From each of these zones. The influence of central London on the market shares for cultural activities reduces from these zones. The market share of the Playhouse is less from the remaining survey zones but nevertheless attracts a market share from each of the 12 survey zones.
- 8.18 The Playhouse is an important facility for Harlow, and clearly appears to be a well-used resource by local residents. The venue contains a large 400-seat main auditorium and a smaller studio theatre, alongside a bar and rehearsal studios. The venue has been operated by Harlow Council since 1996. The venue is used for a range of entertainment purposes, hosting touring theatre productions, stand-up comedy, dance, and live music. The presence of facilities such as the Playhouse could be maximised through the introduction of a broader range of complementary evening economy uses such as restaurants, cafes and bars.
- 8.19 Harlow town centre also hosts the Gibberd Gallery and Gatehouse Arts Gallery, with the former of these playing an important role as a regional arts destination. Both facilities make an important addition to the cultural offer of the town. Harlow Council and Essex County Council also promote the Harlow Sculpture Trail, which allows visitors to undertake a series of guided walks through the town showcasing Harlow's variety of 84 public sculptures, building on Harlow's branding as a 'Sculpture Town'.



Harlow Playhouse

Health and fitness clubs (gyms, leisure centres, swimming pools)

- 8.20 Visiting health and fitness clubs (39% of visits) was stated by survey participants as the sixth most popular activity to take part in. Survey results across the study zones suggests that the largest number of participants in this activity are from zone 9 (57%) and zone 1 (39%).
- 8.21 Harlow town centre was named by survey participants as the most frequented destination for trips to health and fitness clubs (24.2% from across the survey area). The town centre attracts 69.8% of visits to health and fitness facilities from residents in zone 3, 66.4% from residents in zone 1 and 64.1% from residents in zone 2. There are a number of leisure facilities in (or close to) the town centre, including the Council-operated Harlow Leisurezone and budget gym facilities such as PureGym and Exercise4Less. A number of locations outside Harlow town centre also attract market share (24.8% from zone 2, 31.0% from zone 3), as there are facilities such as Anytime Fitness, located opposite Harlow Town railway station, and Mark Hall Sports Centre near Old Harlow.
- 8.22 Positively, for those residents in the Harlow survey zones that uses these facilities, market share is, for the most part, retained in Harlow, and there is little evidence of 'leakage' of market share to other locations. This would suggest that Harlow is well provided for in terms of health and fitness facilities, therefore.

Entertainment venues (bowling, ice skating, bingo)

- 8.23 Visiting entertainment venues across the survey area is not among the most popular activities, accounting for 37% of visits. Across the survey zone, the people who are participating in this leisure activity are from zones 1-3 and zone 9. The top two destinations which participants stated that they visit for entertainment venues are Harlow Bowl, Terminus Street in Harlow town centre (40.9% of visits from across the survey area) and Hollywood Bowl at Stevenage Leisure Park in Stevenage (27.8% of visits from across the survey area). The Harlow Bowl facility draws a market share of 71.5% from zone 1 and 84.0% from zone 2.
- 8.24 Although approximately one-third of respondents to the household survey undertake this type of leisure activity, there is evidence that many are willing to travel reasonably long distances. So for example, Braintree (where there is a large Namco 'Funscape' centre at Freeport Leisure Village which includes bowling, a swimming pool, gaming arcades and so on), attracts 57.4% of the market share from zone 7, and approximately one-third of the market share from zones 4 and 6.

Children's Soft Play Venues

- 8.25 23% of respondents identified visiting soft play venues as an activity they undertake. Harlow has a number of children's play venues including a laser tag and Wild n' Wacky and this provision is reflected in the survey data where 'Harlow (location out of town centre)' was stated by participants as the most popular place to go to access soft play facilities (27.5% of visits) and Harlow Town centre as the second most popular destination for these visits (17.7%). Hoddesdon (6.2%) and Waltham Cross (6.2%) also draw a small percentage of visits.

Expenditure growth in the commercial leisure sector

- 8.26 By applying the baseline population projections we have adopted for our retail capacity forecasts (i.e. the ‘medium growth’ population scenario) to the latest per capita expenditure data on leisure spending, we can obtain an indication of the likely growth in leisure spending available to residents of the survey area over the course of the Council’s Local Plan period. Whilst not all of this available expenditure can, by default, be used to support the development of new commercial leisure facilities in the survey area – particularly because leisure spending is often undertaken with holidays, day trips, special occasions and so on and therefore may in part be spent outside the survey area – it does provide an indication of the scope for additional development to be supported, thus supporting our qualitative observations in respect of the performance of the centres set out above.
- 8.27 Experian provide per capita leisure expenditure data on the following categories of commercial leisure spending:
- **‘Cultural services’** – this includes spending on cinema, theatre, museums, live music/entertainment, nightclubs, bingo, and TV subscriptions such as Netflix. Spending on this type of leisure service ranges from £271 per person (2016), per annum (zone 2) to £388 per person, per annum (zone 4)
 - **‘Recreation and sporting services’** – this includes spending on admission to spectator sports (e.g. watching football matches) and subscriptions to sports/social clubs. Spending on this type of leisure service ranges from £76 per person, per annum (zone 2) to £175 per person, per annum (zone 4).
 - **‘Restaurants and cafes’** – this includes spending in both restaurants and cafes, and also includes spending on ‘alcoholic drinks consumed outside the home’ (i.e. in pubs and bars) and on take-aways. Spending on this type of leisure service accounts for the majority of residents’ commercial leisure spend, ranging from £906 per annum (zone 2) to £1,396 per annum (zone 4).
- 8.28 Experian advise that spending on commercial leisure services will increase by 1.3% per annum over the period over the period 2019-23 and 1.5% between 2023-33⁸, although growth in the period 2017-19 is more limited. By applying the average zonal per capita spend on the different types of commercial leisure activity to Experian’s population projections for the survey area (see Table 1, Appendix II), the total ‘pot’ of commercial leisure expenditure available to residents of the survey area can be calculated. The results of this exercise are summarised in **Table 8.2**.

Table 8.2: Expenditure growth in key commercial leisure sectors, 2016-33

	2016 (£m)	2021 (£m)	2026 (£m)	2031 (£m)	2033 (£m)	Change, 2016-33 (£m)
Cultural Services	135.2	149.4	170.1	193.3	203.2	+68.1
Recreation & sporting services	55.0	60.9	69.2	78.4	82.4	+27.4
Restaurants & cafes	485.9	537.2	611.3	694.1	729.7	+243.8
Total commercial leisure spend	676.1	747.4	850.6	965.8	1,015.8	+339.2

- 8.29 Table 8.2 shows that total spending on commercial leisure is expected to increase by £339.2m in the survey area between 2016 and 2033. Over 70% of this expenditure growth will be in the ‘restaurants and cafes’ sector and therefore, supporting our qualitative analysis that there is considerable scope to develop the restaurant and café offer in Harlow town centre to capitalise on this growth in spending.

⁸ Source: Experian Retail Planner 14, November 2016

Summary

In this section we have set out how residents in the survey area are undertaking visits to commercial leisure facilities such as restaurants, cafes, bars, cinema, and cultural facilities such as theatre, galleries and so on. As this report has previously set out, commercial leisure activities are being an increasingly important component of successful, vital and viable town centres, and the relative lack of many types of leisure uses in Harlow town centre represents a key opportunity area for the Council to improve over the course of its new Local Plan period.

The commercial leisure offer in Harlow town centre will have improved as a consequence of the opening of the new Cineworld cinema and restaurants at the upper level of the Harvey Centre. This opened at the end of 2016, subsequent to completion of the household telephone survey. However, the self-contained nature of this development means that there is potentially limited scope for the vitality and viability of the rest of the town centre to benefit. The household survey also shows that the Harlow Playhouse makes an important contribution to the leisure offer of the town, attracting a market share from each of the 12 household survey zones.

Aligned with the expected growth in expenditure in key commercial leisure sectors (with a total forecast growth in commercial leisure spend of £339.2m in the period 2016-33, the majority of which will come forward in the restaurants & cafes sector), it will be necessary for further leisure provision to be planned for in Harlow town centre in order to support the future vitality and viability of the centre. This will also serve support existing important cultural facilities such as the Playhouse, which the household survey results have identified as being a particularly popular local resource.

The household survey results also demonstrate that the neighbourhood centres have an important role in respect of some types of leisure activity, particularly in respect of pubs and restaurants. In particular, Old Harlow attracts a particular strong market share from its 'local' zone in respect of these categories, and it is clear that this assists in supporting the wider vitality and viability of the centre.

9 CONCLUSIONS & RECOMMENDATIONS

This study has set out an updated assessment of the performance of Harlow town centre and the neighbourhood centres across Harlow District. We also provide updated guidance on the quantitative and qualitative 'need' for new retail and commercial leisure floorspace. This study will form part of the evidence base for the Council's replacement Local Plan, in accordance with the findings of the National Planning Policy Framework (NPPF), and can be used in assisting the development of strategies for Harlow town centre, the neighbourhood centres, and the needs of the new strategic growth areas which are expected to come forward on the periphery of the Harlow urban area over the course of the new Local Plan period.

In this final section we bring together the analysis set out in the previous sections of the study, in order to draw conclusions and develop a series of strategic recommendations. Firstly, however, we summarise the objectives of the NPPF, and highlight the key national trends which we consider are likely to influence and impact upon retail and town centre development in the District over the Council's new Local Plan period to 2033.

The sub-regional network

- 9.1 Harlow town centre draws £304.2m of comparison goods (non-food) spending from the survey area which we have used as the basis of our assessment, equivalent to 22.9% of total available comparison goods expenditure. It is the most popular destination for comparison goods shopping for residents in the survey area. A further £224.2m of comparison goods spending is attracted to the concentration of retail warehousing along Edinburgh Way in Harlow, and whilst much of the offer in this area is 'bulky goods' in nature (e.g DIY stores, electrical goods stores and so on), we do consider that there is some overlap with the product offer of Harlow town centre, and accordingly the two locations are, to an extent, likely to be competing with each other for expenditure.
- 9.2 Because we have used the same survey area as the previous household telephone survey (undertaken in support of the Harlow Retail Needs Study 2010), it is possible to directly compare how Harlow's market share has changed. This shows that whilst Harlow town centre continues to have a strong catchment — drawing trade from across the 11 zones which comprise the survey area, and a strong 'primary catchment area' covering its urban area and immediate hinterland — its market share has declined (to varying degrees) from seven of the 11 survey zones relative to the position at the time of the previous household survey, and the Council will need to ensure that this trend is reversed during the new Local Plan period.
- 9.3 The main competition for comparison goods spending within the survey area is from Bishop's Stortford town centre, which draws £168.7m of comparison goods spending from the survey area. This is followed by Brookfield, Cheshunt (£105.6m). These two destinations act as the key competing locations, with both destinations drawing over £100.0m of comparison goods spend from the survey area.
- 9.4 Proposals for a new town centre scheme in Bishop's Stortford are currently on hold, but could come forward in the form of a revised scheme over the course of the Council's Local Plan period. Brookfield, Cheshunt is an out-of-town shopping destination located on the edge of Cheshunt; the centre predominantly comprises of 'high street' retailers such as Next, River Island and Clarks, alongside large Tesco Extra and Marks & Spencer stores. Plans have been presented for a major housing, shopping and leisure development adjacent to Brookfield which are expected to include approximately 1,500 new dwellings, a new cinema, and potentially a new civic centre. This development is also expected to include a substantial quantum of retail floorspace. It is important that the Council monitors progress of developments in respect of this scheme, to ensure the type and scale of development proposed would not result in additional market share being drawn from residents in Harlow District.
- 9.5 Beyond this is a 'second tier' of competing centres, which draw smaller but not insignificant amounts of comparison goods spending from the survey area, such as Welwyn Garden City (£55.9m), Hertford (£37.1m), Lakeside (£36.2m) and Chelmsford (£33.7m). Again, it is recommended that the Council monitor planned developments in these locations which may increase the attractiveness of the centres over the course of the Local Plan period.
- 9.6 The impact of Westfield Stratford City, which was not trading at the time of the Council's previous retail study, on shopping patterns of residents in the survey area as a whole has been relatively limited. The development only draws £17.2m of comparison goods spend from the survey area. It would appear that for residents wishing to travel further afield for comparison goods shopping, Lakeside remains a more popular destination — likely to be on account of its relative ease of access compared to Stratford from much of the survey area. Nevertheless, Westfield Stratford City

does draw £3.1m of spending from the Harlow zones (zones 1, 2, 3 and 5) and so has therefore had a moderate impact on shopping patterns of residents in the District.

- 9.7 Having set out the sub-regional context in which retail facilities in Harlow operate, we make the following District-wide strategic recommendations for the Council to take forward in its Local Plan.

District-wide recommendations

- **HD1** — The Council should ensure that the core retail functions of the town and neighbourhood centres are protected and, where possible, enhanced. Active uses on ground floor frontages should be encouraged throughout primary and secondary locations, ensuring that contiguous frontages are provided, and avoiding changes of use which break up the run of facades.
- **HD2** — The Council should plan for the below District-wide new comparison and convenience goods floorspace over the period to 2033. Both sets of floorspace figures are a range of figures which reflect the different potential strategic housing growth options which could come forward in the District.

Comparison goods: between 16,300 and 18,100 sq.m net additional comparison goods floorspace by 2026, increasing to (indicatively) between 35,500 and 40,200 sq.m net* additional comparison goods floorspace by 2033. (*longer term forecasts should be subject to further review during the Plan period)

Convenience goods: between 2,500 and 3,200 sq.m net additional convenience goods floorspace by 2026, increasing to (indicatively) between 3,900 and 5,500 sq.m net* additional comparison goods floorspace by 2033. (*longer term forecasts should be subject to further review during the Plan period)

- **HD3** — The above floorspace figures should be reviewed at regular intervals throughout the Council’s new Local Plan period, particularly once strategic growth locations and quantum of planned housing development is confirmed.
- **HD4** — Ensure a sufficient supply of suitable sites to meet the full extent of the quantitative ‘need’ outlined in Recommendation HD2. The ‘need’ for new floorspace should not be compromised by limited site availability. Floorspace should not be allocated to out-of-centre locations, in order to protect the vitality and viability of the network of town and neighbourhood centres.
- **HD5** — The identification of sites to meet the retail and commercial leisure floorspace ‘need’ should be subject to the sequential test, and, in accordance with the approach set out in the NPPF, be directed towards town and neighbourhood centres in the first instance, followed by appropriate and well-connected edge-of-centre sites.
- **HD6** — Reflecting the NPPF, planning applications for development of retail, commercial leisure and other ‘town centre’ uses not within a defined frontage/centre (as defined in the NPPF) will need to demonstrate compliance with the sequential and impact ‘tests’ set out at paragraphs 24 and 26 of the NPPF.
- **HD7** — In order to protect the vitality and viability of the Council’s network of town and neighbourhood centres, an impact assessment threshold of 500 sq.m (gross) should be adopted. This will help protect the network of town and neighbourhood centres from inappropriate edge and out-of-centre retail development, ensuring that the local authority retains the greatest level of control during the decision-making process.
- **HD8** — It is recommended that the identified quantitative ‘need’ figures towards the end of the Local Plan period (i.e. beyond 2026) are considered indicative, and should be subject to review and updating throughout the Plan period. Key inputs into the quantitative ‘need’ assessment (such as population, expenditure growth rates, and levels of ‘special forms of trading’ such as online shopping) will invariably change according to economic fluctuations. In parallel, patterns of shopping and leisure visits will also continue to evolve as new development is brought forward across the wider sub-region in competing centres.
- **HD9** — Our performance assessment has demonstrated that the existing network of town and neighbourhood centres in the District are currently performing a role consistent with their classification in the Council’s hierarchy of centres. Accordingly, we do not recommend any changes to the existing hierarchy of centres, shown below. For the avoidance of doubt, the concentration of retail warehousing on Edinburgh Way should continue to be treated as an out-of-centre development, and should not be allocated as a centre within the District’s retail hierarchy.

Town centre: Harlow town centre

Neighbourhood centre: Bush Fair, Church Langley, Old Harlow, The Stow, Staple Tye

- **HD10** — The Council should monitor progress of planned retail-led developments outside the District such as Brookfield Riverside to ensure the type and scale of development proposed would not result in additional market share being drawn from residents in Harlow District.

Harlow town centre recommendations

- 9.8 Having set out the general District-wide recommendations, below we set out a summary of the performance of Harlow town centre, and provide recommendations to take forward in the Council's new Local Plan.
- 9.9 Our health check analysis of Harlow town centre has confirmed that the centre continues, for the most part, to be performing well against key vitality and viability indicators. The centre has a generally good mix of 'mid market' comparison goods retailers, although the loss of Marks & Spencer store from the centre is unfortunate, given the footfall-generating role these stores can have. Nevertheless, the presence of stores such as Primark, Next, H&M and so on are important attractors and help contribute to a reasonably solid retail mix. The presence of two foodstores, the civic offices, and a limited number of leisure uses also helps contribute to the vitality and viability of the centre. The closure of the BHS store in the Harvey Centre (as a result of the company entering administration) has left the town centre without a department store and this represents a key qualitative gap in the offer of the town centre. Prime retail rents in the town centre have decreased noticeably in recent years and this trend needs to be closely monitored by the Council, as it shows that rental rates are needing to be reduced in order for units to be let.
- 9.10 Positively, there is considerable investment in Harlow town centre taking place at present, and the recently-opened redevelopment of the upper level of the Harvey Centre which has introduced a new cinema and a range of family dining restaurants will help meet two areas where the town centre is currently underprovided for. The location of the development on the upper floor of the enclosed shopping centre does, unfortunately, mean there may be less of an opportunity for the vitality and viability of the rest of the town centre to benefit from these new openings than if the development was located more prominently elsewhere within the centre. Much of Harlow town centre appears very 'closed for business' outside of retail trading hours and measures which extend the trading hours of the town centre should be encouraged.
- 9.11 The Harvey Centre development has introduced a number of family dining restaurants into the town centre, which our analysis has also shown is an area where the town centre is lacking at present. There is considerable expenditure growth forecast in this sector over the course of the Plan period, and therefore there is scope for further uses of this nature to be supported in the centre. Indeed whilst existing leisure facilities such as the Playhouse make an important contribution to the leisure offer in the centre and should continue to be supported, the lack of supporting facilities such as cafes and restaurants means that the potential of existing facilities is arguably not being fully realised. The provision of additional leisure facilities in the centre will help to develop Harlow's appeal as an evening economy destination and encourage longer dwell time in the centre both during the day and evening.
- 9.12 There remains an opportunity to improve the physical appearance of the town centre, and in particular to soften the harsh landscaping of some of the original New Town areas such as Broad Walk. Better public realm, landscaping, and use of the sculptures as focal points are all opportunities which the Council should consider.
- 9.13 Town Centre North remains, as was identified in the Council's previous evidence base studies, in need of considerable regeneration, and is currently struggling to find a clear role and purpose. Vacancy rates in this part of the centre are high, and footfall is, for the most part, low. As there are no key retail attractors, the area is not part of most shoppers' retail 'circuit'. The focus of retail offer in the centre has shifted southwards since the opening of the Water Gardens and for this to be rebalanced, requires a stronger footfall attractor than the Market which currently operates from this location is able to provide.
- 9.14 It is recommended that the Town Centre North remains the focus for regeneration activity over the new Local Plan period, although there may be merit in the Council reviewing the boundary of this allocation and examining the scope for widening it if it is considered this could assist in a comprehensive regeneration scheme coming forward.
- 9.15 The Council should consider a strategy which sees Town Centre North become a hub for an enhanced, upgraded food and drink offer (both in terms of daytime cafes and evening drinking venues, both of which are under-represented in Harlow at present), as part of a wider mixed-use development. The open Market Place provides a natural focal point, as it means outside seating can be easily be provided. Any redevelopment of this area should therefore seek to retain (and enhance) the Market Place as a focal point, particularly given the absence of any other comparable open areas within the town centre.
- 9.16 The market itself should be retained and supported, but complementary uses introduced which encourage more dwell-time, which might include permanent fixtures such as 'pod' developments (e.g. coffee shops, juice bars), improved seating, landscaping and so on. There is also likely to be a need for more marketing/promotion of the market, diversification of the range of goods sold, specialist monthly markets to help drive footfall, and so on. In summer months the Council may wish to promote special events such as evening markets to help drive footfall outside of retail trading hours.

- 9.17 We would recommend that residential uses should be accommodated on upper floors as part of any redevelopment of this area, in order to add footfall and vibrancy (particularly outside of retail trading hours) and increase the town centre’s residential population. Active frontages (i.e. retail, leisure and other ‘main town centre uses’ should be retained at ground floor level at key focal points such as the market place.
- 9.18 The 2010 Study recommended the development of a large-format foodstore in Town Centre North to help support the regeneration of this part of the town centre. Based on the current trading performance of foodstores in Harlow town centre, the more limited quantitative ‘need’ this study has identified (compared to the previous study) and the general changes in the convenience goods market which have taken place since the Council’s last study, we do not consider a large foodstore-led regeneration scheme to be a priority; it would also be likely to attract limited demand, given most convenience goods operators are trading in the Harlow area. However, we consider there may be potential for a smaller-format foodstore to be accommodated, as part of a wider mixed-use, comparison goods and commercial leisure-led redevelopment opportunity, as this would further assist in driving footfall and delivering a strong ‘anchor’ to this part of the centre.
- 9.19 The Council is, under the NPPF, required to meet its identified retail needs in full and we would therefore expect any redevelopment of Town Centre North to include an element of comparison and convenience goods retail floorspace. We estimate that the Town Centre North area has a total site area of approximately 4.09ha, or 40,000 sq.m gross. Applying a net to gross ratio of 80% means that the site could potentially accommodate up to 32,000 sq.m net floorspace. In other words, in theory there is capacity for Town Centre North to accommodate all of the identified quantitative comparison goods ‘need’ up to 2026, plus an element of convenience goods floorspace and commercial leisure uses.
- 9.20 However, accommodating all of the identified comparison goods ‘need’ on this site would restrict the availability of a mixed-use scheme including commercial leisure to come forward (which we consider represents the preferable future use of the site in order for the greatest benefit to the vitality and viability of the town centre to be realised) and therefore we would suggest a proportion of the ‘need’ is accommodated through intensification of existing retail sites elsewhere in the town centre, as well as to meeting to the needs of the planned new residential communities (see **recommendation HEX2**, below)
- **HTC1** — Continue to support and facilitate appropriate growth on sites in Harlow town centre in order to support and enhance its role and function as the highest order centre in the District and improve the attractiveness of the retail and commercial leisure offer. This will in turn lead to Harlow being able to consolidate and potentially strengthen its market share against the offer of the competing centres in its catchment area, and will also deliver other benefits such as increasing ‘dwell time’ of users in the centre, and more ‘linked trips’ spending.
 - **HTC2** — The core function of Harlow town centre as a comparison goods shopping destination should be protected and enhanced. This should be achieved through development and implementation of robust frontage policies, which define the primary and secondary shopping frontages in Harlow town centre. These policies will assist in ensuring that a ‘critical mass’ of retail floorspace, which is key to driving footfall and visitor numbers, is retained. Such an approach will also ensure the centre is as best placed as possible to withstand the potential increased attractiveness of nearby locations which compete for market share.
 - **HTC3** — Harlow town centre should accommodate the majority of the identified comparison goods capacity requirements of between 16,300 and 18,100 sq.m net by 2026. This is consistent with the role and function of Harlow town centre as the sole highest order centre in the District, and the need for continued investment and development in the centre to ensure its long term vitality and viability. Based on our high-level assessment, the majority of the identified comparison goods capacity can be accommodated on opportunity sites in Harlow town centre.
 - **HTC4** — The Council should consider favourably proposals which seek to provide new comparison goods floorspace in Harlow town centre. This could include modernisation/ amalgamation of existing units within the primary shopping frontage to provide larger-format floorspace which may be more attractive to higher profile operators. Sub-division of existing units within the primary shopping frontage should be resisted.
 - **HTC5** — There is a clear need for the provision of new café/restaurant and commercial leisure uses in Harlow town centre in order to diversify the offer and encourage longer dwell-time in the centre. Accordingly applications which seek to deliver enhancements to the current offer in the town centre should be supported in principle. However, allied to recommendation HTC2, these should be concentrated outside the primary shopping frontage in order to protect the core retail function of the town centre, and support the regeneration of peripheral parts of the centre which are currently underperforming.
 - **HTC6** — The Council should seek to progress the regeneration of the northern end of Harlow town centre, focused on the existing Town Centre North allocation, as a mixed-use, commercial leisure-focussed redevelopment opportunity. The focus of the redevelopment should be the delivery of modern class A3 and class A4 floorspace, in

order to encourage development of an 'evening economy', and encourage greater dwell time in the centre. Any redevelopment should seek to make better use of the open market place as a focal point.

- **HTC7** — The Council may wish to give consideration to extending the existing Town Centre North allocation to cover the area between Broad Walk and Velizy Avenue, in order to deliver further opportunities for regeneration of underused land within close proximity to the existing retail and leisure offer and promote a comprehensive approach to redevelopment in the town centre. Any redevelopment of this area would need to make provision for replacement bus interchange facilities, unless a suitable alternative, centrally-located site for this use can be made available elsewhere in the centre.
- **HTC8** — There is no pressing need for the development of additional convenience goods floorspace in Harlow town centre, however there may be scope for a small-format foodstore (indicatively up to 1,000 sq.m net) to be accommodated as part of any mixed-use development at the northern end of Harlow town centre in order to provide further consumer choice and assisting in the regeneration of this area.
- **HTC9** — Allied to recommendation HTC3, it would also be expected that any redevelopment of the northern end of Harlow town centre would need to include an element of comparison goods floorspace. There is a qualitative shortfall in the offer of the town centre in terms of the absence of a department store and, if this cannot be secured through the re-use/redevelopment of the BHS unit, there may be scope for this to be accommodated as part of any redevelopment of the northern end of Harlow town centre.
- **HTC10** — Any redevelopment of the northern end of Harlow town centre should also explore the potential to incorporate residential uses at upper levels in order to enhance vibrancy and footfall. Active frontages (i.e. retail, leisure and other 'main town centre uses' should be retained at ground floor level at key focal points such as the market place.
- **HTC11** — Allied to recommendation HTC6, the Council should continue to invest in and support the market in Harlow town centre, as this provides an important complementary shopping role and footfall attractor. Opportunities should be explored to provide further promotion of the market, development of special events, and introduce more food stalls to help broaden the potential customer base.
- **HTC12** — The Council should continue to promote, invest in and support existing leisure and tourism assets in the town, such as the Playhouse, Gibberd Gallery and Harlow Sculpture Trail, as they make an important to the wider cultural offer of the town and in some cases allow Harlow to attract visitors from beyond its typical catchment area. Applications which seek to enhance the range of complementary uses (see Recommendation HTC5) and encourage longer dwell-time in the centre should be supported where appropriate.
- **HTC13** — A co-ordinated approach to place marketing and the promotion of special events in the town centre should be undertaken in conjunction with the various key stakeholders in the town centre, such as the owners of the Harvey Centre. The Council should also work with the owners of the Harvey Centre to ensure the vitality and viability of the rest of the town centre benefits from the forthcoming opening of the new cinema/restaurant development at the upper level of the Harvey Centre.
- **HTC14** — Applications for new development outside defined frontages in the centre (i.e. primary shopping frontage) will need to have regard to the sequential and impact tests, as set out at paragraphs 24 and 26 of the NPPF.
- **HTC15** — The Council should continue to invest in improving the public realm and visual appearance of the town centre, and in particular the 'softening' of the landscape, introduction of enhanced public realm in and around the market place, and improving navigability through the centre. The library building which sits between Broad Walk and the Water Gardens acts as a barrier to the permeability of the centre and provides an opportunity to develop a new focal point in the centre, were this building to be removed.

Neighbourhood centre recommendations

- 9.21 Harlow has a network of five neighbourhood centres — Bush Fair, The Stow, Old Harlow, Church Langley and Staple Tye — which play a valuable role in meeting residents' day-to-day shopping and local services needs. As set out above, we are satisfied that each of these centres is currently fulfilling a role and function equivalent to that of a neighbourhood centre and accordingly we do not consider there to be merit in changing any centre's position in the District's hierarchy of centres.
- 9.22 For the most part, the neighbourhood centres benefit from strong levels of vitality and viability, and have a reasonable diversity of uses. The centres are quite different in their design, role and function:
- the oldest neighbourhood centres of **Bush Fair** and **The Stow** have the greatest diversity of uses but both are identified as having problems of anti-social behaviour; there is also scope for the public realm in both centres to

be improved, whilst the Council should explore the scope for provision of additional supermarket provision in the vicinity of Bush Fair. The Council have recently published a Supplementary Planning Document which takes a design-led approach to supporting regeneration at The Stow and it is considered that a similar policy approach would be beneficial for Bush Fair.

- Conversely, newer centres such as **Church Langley** have stronger foodstore provision but a more limited diversity of other uses.
- **Old Harlow** is unique in its role and function and provides a much more ‘traditional’ experience. The presence of a number of complementary footfall-generating uses such as pubs, cafes and a doctor’s surgery play an important contribution to the wider vitality and viability of the centre.
- **Staple Tye** is a modern purpose built centre which includes two strong ‘anchor’ stores (Lidl and Poundland) but is overly reliant on fast-food/takeaway stores.

9.23 Our recommendations for the network of neighbourhood centres are as follows:

- **HNC1** — The role and function of Bush Fair, The Stow, Old Harlow, Church Langley and Staple Tye as neighbourhood centres should be protected and enhanced over the course of the Council’s new Local Plan period.
- **HNC2** — The Council should not plan for the development of a significant quantum of additional comparison goods retail floorspace at its network of neighbourhood centres (as set out in Recommendation HTC3, the majority of the identified comparison goods floorspace capacity should be directed towards Harlow town centre as the highest order centre in the District). Development of significant additional floorspace would result in the centres’ undertaking a role and function not in keeping with their classification as neighbourhood centres.
- **HNC3** — Applications which seek to enhance existing provision, or provide new retail floorspace appropriate in scale to the role and function of the centre should be supported in principle. Applications for the development of other ‘town centre’ uses should also be supported in principle where they will make a positive contribution to the vitality and viability of the centre, providing they are of a scale appropriate to the role and function of the centre.
- **HNC4** — The Council should seek to ensure that the neighbourhood centres continue to meet a broad a range of day-to-day shopping needs as possible, and therefore applications which would result in a reduction in the number of units in the centre (and therefore a reduction on the diversity of uses) should generally be resisted.
- **HNC5** — The exception to policy HNC4 is in Bush Fair neighbourhood centre, where the Council should consider any proposals for the expansion of the existing Co-Operative foodstore favourably, providing it was of a scale appropriate to the role and function of the centre. It is considered the qualitative benefits of a larger foodstore in this location would outweigh the loss of uses in neighbouring units. Should the extension of this store be unlikely to materialise, the Council should seek to identify and allocate a suitable site on the edge of the neighbourhood centre which could accommodate a small to medium sized foodstore (indicatively up to 1,000 sq.m net). Any site allocation should seek to develop appropriate linkages with the existing neighbourhood centre in order for the wider vitality and viability of the centre to benefit.
- **HNC6** — The Council should seek to deliver public realm/environmental enhancements to all of its neighbourhood centres, with a particular focus on the following areas:

- **Old Harlow** — improvement of shop fronts;
- **Bush Fair** — landscaping, enhancement of public realm, measures to reduce antisocial behaviour;
- **The Stow** — landscaping; wayfinding (in particular enhancement of linkages between the new Aldi store and the rest of the neighbourhood centre); enhancement of public realm; measures to reduce antisocial behaviour;
- **Church Langley** — accessibility between Tesco store and other key uses in the neighbourhood centre;
- **Staple Tye** — better integration of public transport facilities, alongside improvements to bus shelters and public transport information.

New communities

9.24 This study has identified that Harlow is expected to receive significant additional housing growth over the course of the Council’s new Local Plan period. Neither the scale or precise locations of this growth is yet to be confirmed, and accordingly this study has planned for a range of growth scenarios. As set out under recommendation HD3, we recommend that capacity requirements are updated once levels of, and locations of, planned housing growth are confirmed.

- 9.25 The new residential communities will not, in all instances, be well located to an existing neighbourhood centre and accordingly there is likely to be a need for new neighbourhood centres and hatches to be allocated to ensure that residents' day to day shopping needs can be met at the local level.
- **HEX1** — The Council should ensure that new residential communities which are expected to come forward in Harlow should have satisfactory access to a range of day-to-day convenience and comparison goods shopping facilities similar to that which existing residents have in respect of access to neighbourhood centres and hatches.
 - **HEX2** — it is recommended that the Council 'ring fence' a proportion of the identified retail capacity requirements to meet local/day-to-day shopping needs of the new residential communities; this proportion should be established once a better understanding of locations, quantum of development and timescales for development have been confirmed.

Monitoring and next steps

- 9.26 Our study has identified that the centres in the District benefit, for the most part, from good levels of vitality and viability, and whilst most centres have areas where improvements need to come forward, they are currently able to meet many residents' shopping needs. The Council should seek to deliver environmental improvements across both Harlow town centre and all of the neighbourhood centres, and the regeneration of Town Centre North in Harlow town centre should remain a strategic priority for the Council.
- 9.27 The Council has commissioned several refreshes of its retail capacity evidence base in recent years (in 2007, 2010 and 2011), and it is recommended that this approach is carried forward. There is a particular need to do this once locations and amounts of growth for the extensions to Harlow are agreed, if they are different to the scenarios tested in this report. Other key data inputs into the capacity forecasts, such as expenditure growth rates and 'special forms of trading' rates (e.g. online shopping) are also frequently published, confirming the need for the Council to maintain an up-to-date retail evidence base.

NPPF Terms

- * **Edge of centre:** For retail purposes, a location that is well connected and up to 300 metres of the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances.
- * **Main town centre uses:** Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).
- * **Out of centre:** A location which is not in or on the edge of a centre but not necessarily outside the urban area.
- * **Out of town:** A location out of centre that is outside the existing urban area.
- * **Primary shopping area:** Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).
- * **Primary and secondary frontages:** Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.
- * **Town centre:** Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.

Technical Terms

- * **Benchmark turnover:** The expected turnover of existing retail facilities based on sales floorspace and expected average sales densities.
- * **Catchment area:** this is an area where a centre or store attracts most of its trade.
- * **Claw back:** this is a catchment area's expenditure that is currently spent outside a catchment, but is encouraged to be spent within a catchment through the development of new floorspace.
- * **Comparison goods:** Refers to non-food shopping – including fashion, home furnishings, electrical items, DIY goods, books and music 'Service' uses refer to commercial leisure services such as restaurants and cafes, as well as retail services such as hairdressers, beauty salons, banks, building societies and estate agents. Non-retail uses such as cinemas and arts centres are not included in Experian Goad's analysis, but are accounted for qualitatively through our own analysis.
- * **Comparison spending:** expenditure (including VAT as applicable) on goods in COICOP categories: clothing materials & garments, shoes & other footwear, materials for maintenance & repair of dwellings, furniture & furnishings; carpets and other floor coverings, household textiles, major household appliances, whether electric or not, small electric household appliances, tools and miscellaneous accessories, glassware, tableware and household utensils, medical goods and other pharmaceutical products, therapeutic appliances and equipment, bicycles, recording media, games, toys and hobbies; sport and camping equipment, musical instruments, gardens, plants and flowers, pets and related products, books and stationery, audio-visual, photographic and information processing equipment, appliances for personal care, jewellery, watches and clocks, other personal effects.
- * **Convenience goods:** Refers to food shopping – including supermarkets, and specialist stores such as bakers, greengrocers, off licences and so on.

- * **Convenience spending:** expenditure (including VAT as applicable) on goods in COICOP categories: food and non-alcoholic beverages, tobacco, alcoholic beverages (off-trade), newspapers and periodicals, non-durable household goods.
- * **Expenditure forecasts:** assessments of future expenditure based on applying stated growth rates, based on information provided by data providers such as Experion.
- * **Expenditure projections:** estimates of future expenditure obtained by projecting past trends in expenditure by means of recognised statistical extrapolation technique.
- * **Gross floorspace:** Total external floorspace including exterior walls.
- * **Forecast year(s)/internal year(s):** these are in the year(s) when growth is forecast.
- * **Independent retailers:** Single-store or limited store retailers (typically with a maximum of nine outlets)
- * **Inflow:** this is expenditure generated from beyond a study area/catchment area that is spent in centres/stores within the study area/catchment area.
- * **Linked trip:** combining a visit to a supermarket or other use with a trip to use other shops and services in a nearby town/district/local/village centre.
- * **Leakage:** expenditure within a study area/catchment area that is spent outside the study area/catchment area.
- * **Market share:** the proportion of study area/catchment area's expenditure spent in a centre or store, expressed as a percentage.
- * **Multiple retailers:** National or regional 'chain store' retailers.
- * **Net floorspace:** Retail floorspace devoted to the sale of goods, excluding storage space (i.e. the trading area).
- * **Overtrading:** the amount of turnover in excess of a company or expected benchmark turnover.
- * **Per capita expenditure:** amount of money per annum spent on a category of goods by one person per year.
- * **Per capita expenditure growth per annum:** annualised real growth in spending (using constant prices).
- * **Qualitative need:** floorspace required to improve the provision and distribution of shopping and leisure services to improve choice, meet the needs of the community and promote the vitality and viability of town centres.
- * **Quantitative need:** floorspace required to support the projected expenditure growth over the plan period.
- * **Sales density:** the turnover per sqm of net floorspace achieved by retail floorspace.
- * **Sales density growth:** the annualised percentage of growth in turnover of existing floorspace.
- * **Special forms of trading (SFT):** Non-store based retail spending, including via the internet, mail order, markets and telephone sales. The majority of special forms of trading is accounted for by online shopping.
- * **Study area:** this is the area where a study of shopping patterns is based upon; it is normally divided into zones.
- * **Turnover efficiency:** An allowance for a retailer's ability to improve their turnover efficiency of sales density and the potential for existing floorspace to increase its productivity in the future, meaning that retailers increase their turnover to floorspace ratio.
- * **Under trading:** the amount of turnover below a company 'benchmark' turnover.