

# Harlow Retail & Leisure Needs Study 2016

Volume 2 — Plans & Appendices | January 2017 | Final Report



on behalf of   
*Working together for Harlow*



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For and on behalf of GVA Grimley Ltd

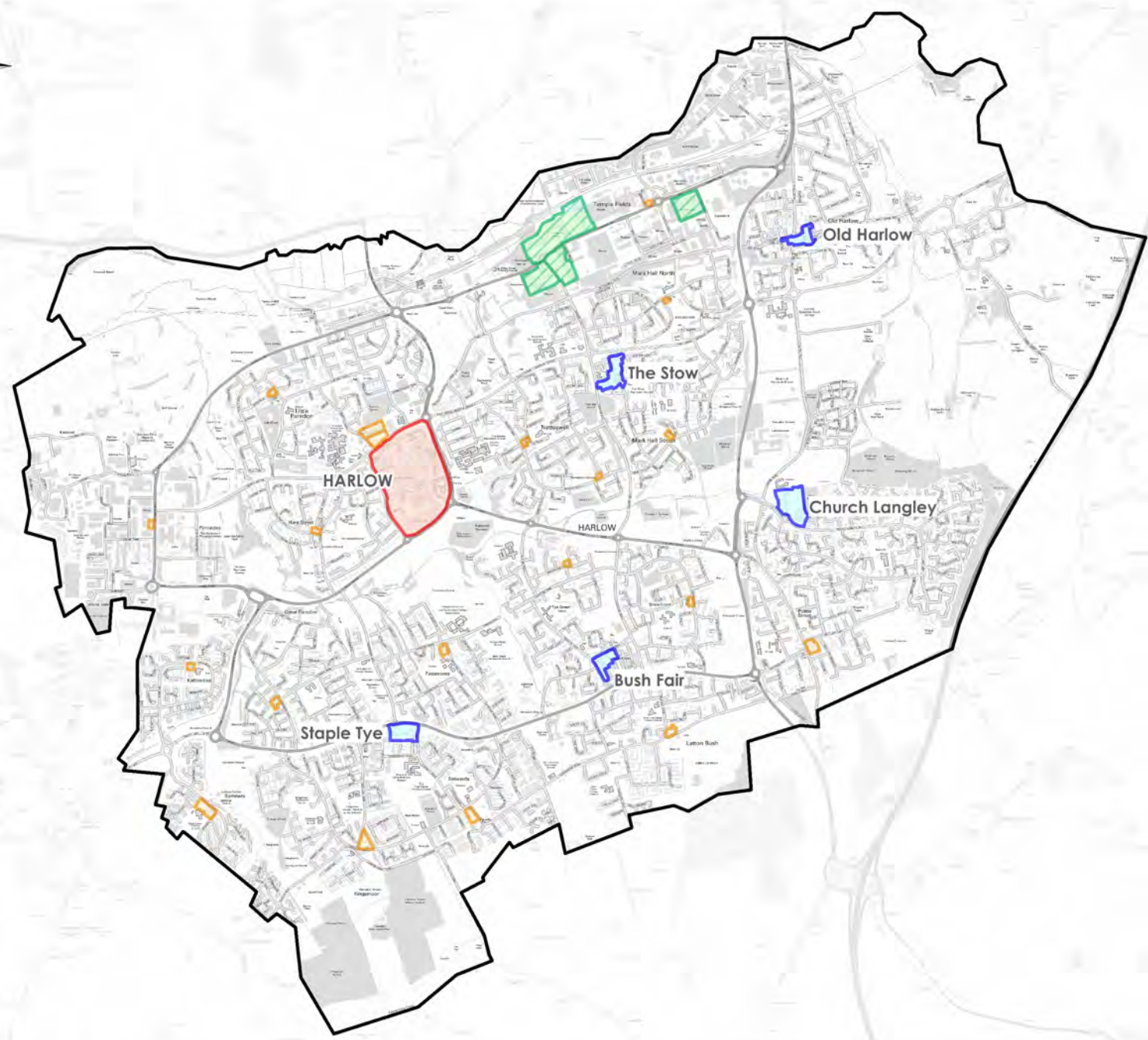
# STUDY AREA & MARKET SHARE PLANS



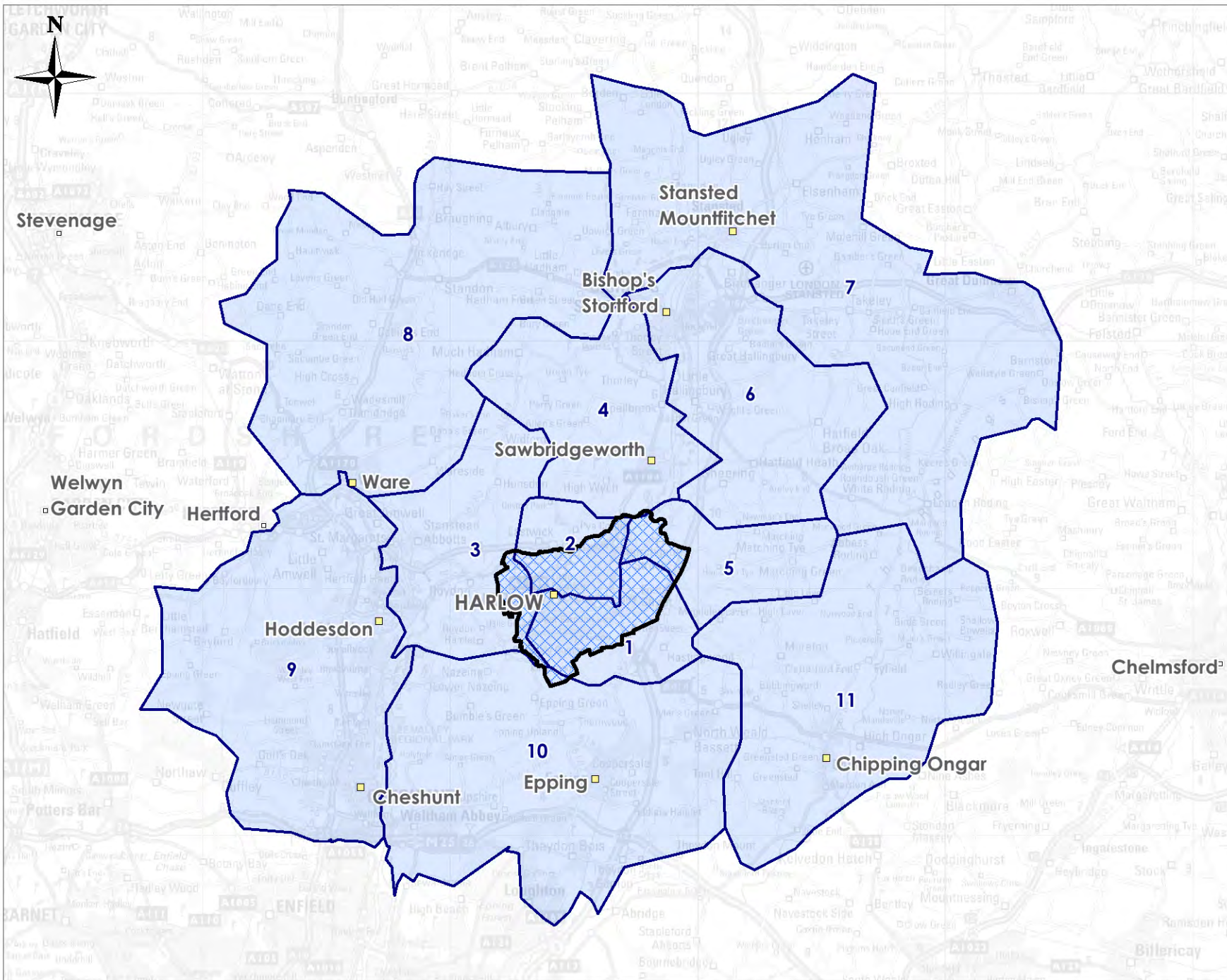
### Harlow Retail Study 2016

#### Key

-  Harlow district boundary
-  Town Centre boundary
-  Retail Warehouse Parks
-  Neighbourhood Centre
-  Hatches



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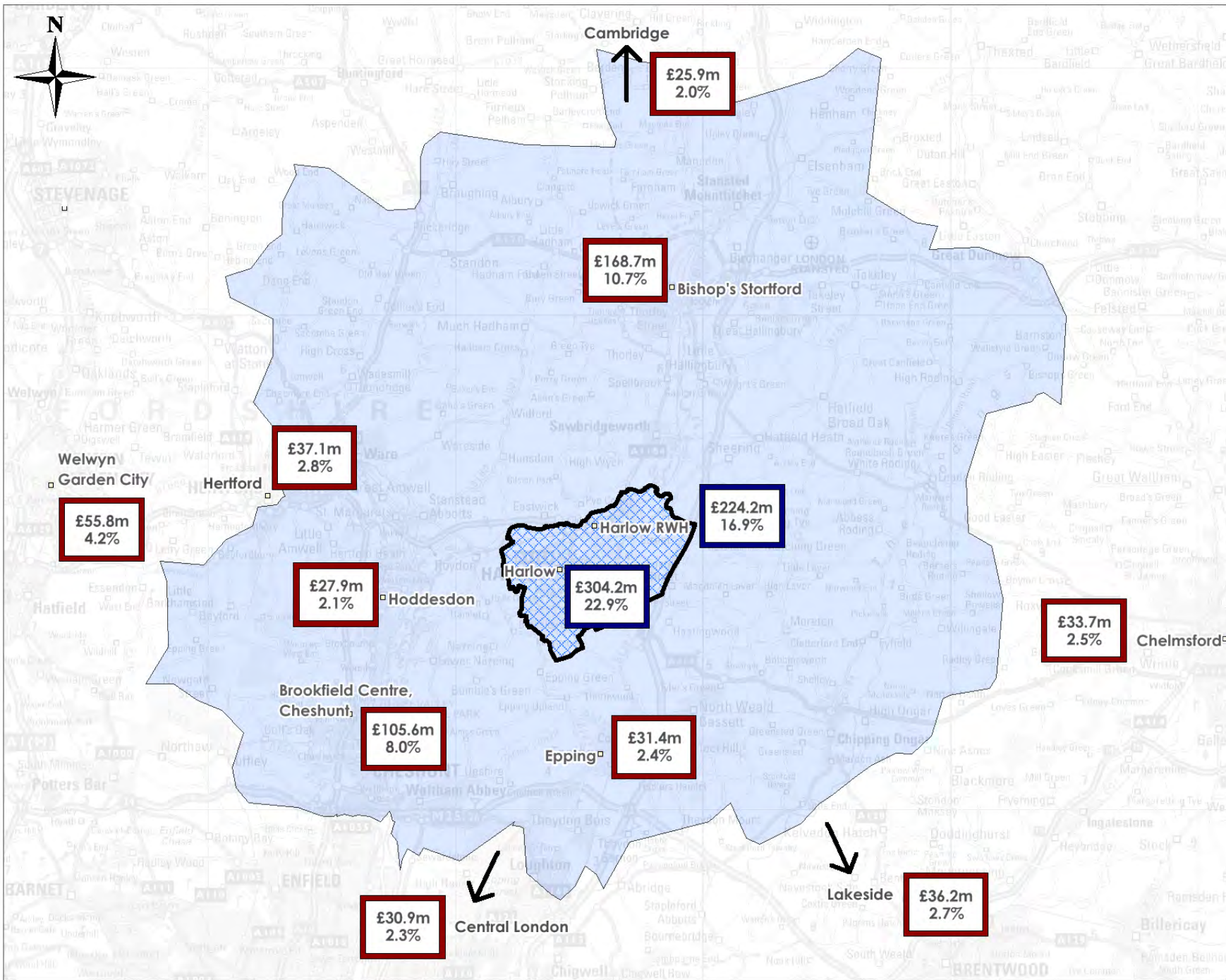
### Harlow Retail Study 2016

- Key**
- Harlow district
  - Study Area
  - Survey Zone

**Zone**   **Postal Sectors**





1	CM17 9, CM18 6/7, CM19 4
2	CM20 1/2/3
3	CM19 5, EN11 0, SG12 8
4	CM21 0/9, CM23 4, SG10 6
5	CM17 0
6	CM22 7, CM23 2/3/5
7	CM6 1, CM22 6, CM23 1, CM24 1/8
8	SG11 1/2, SG12 0/7
9	EN7 5/6, EN8 0/7/8/9, EN10 6/7, EN11 8/9, SG12 9, SG13 7/8, SG14 1
10	CM16 4/5/6/7, EN9 1/2/3, IG10 2
11	CM5 0/9

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### Harlow Retail Study 2016

#### Key

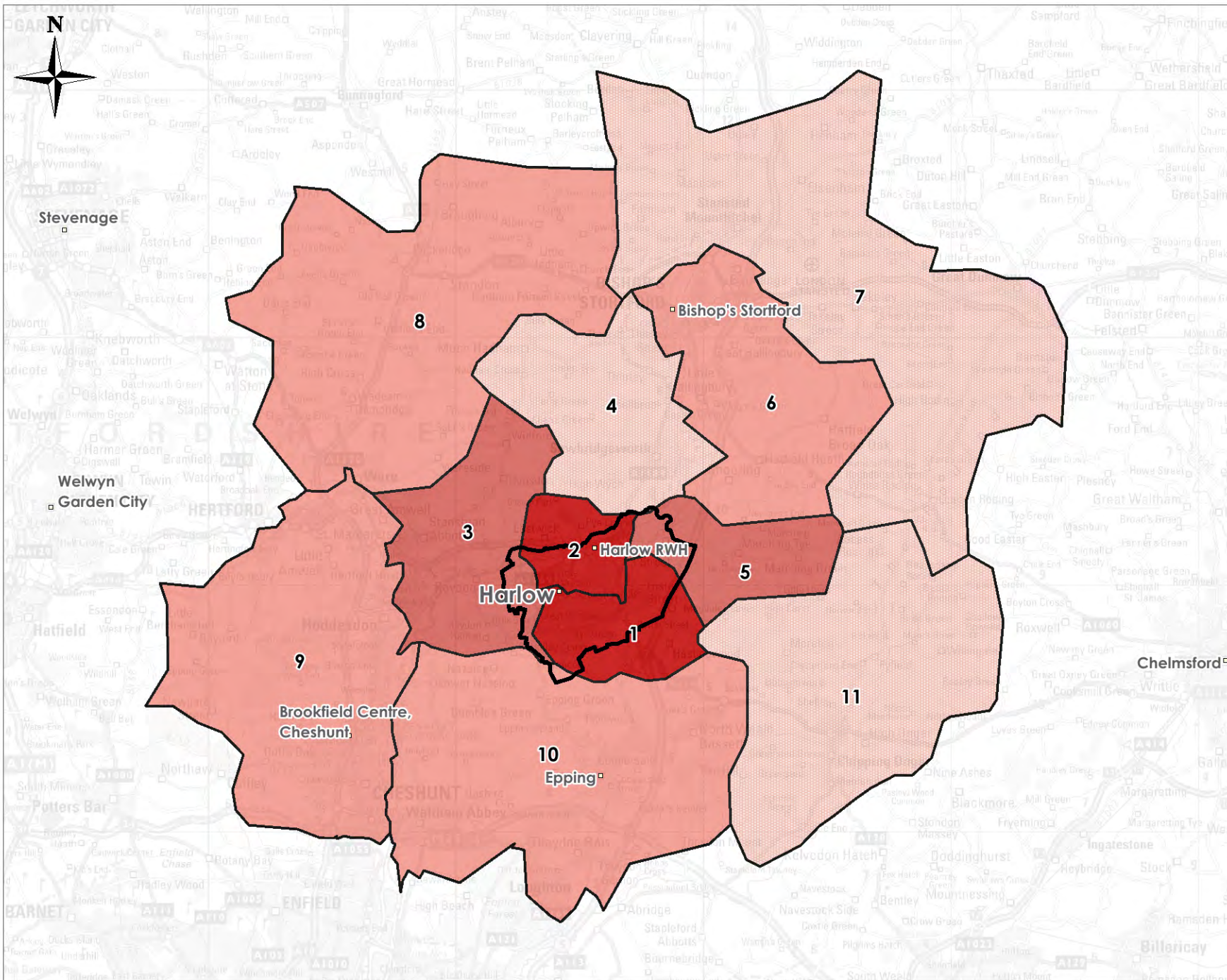
-  Harlow district boundary
-  Study area
-  Expenditure flow to location within Harlow
-  Expenditure flow to location outside Harlow

Note: all destinations with a comparison goods turnover in excess of £30.0m from survey area are shown

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# Plan 2: Comparison goods expenditure flows

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**Harlow Retail Study 2016**

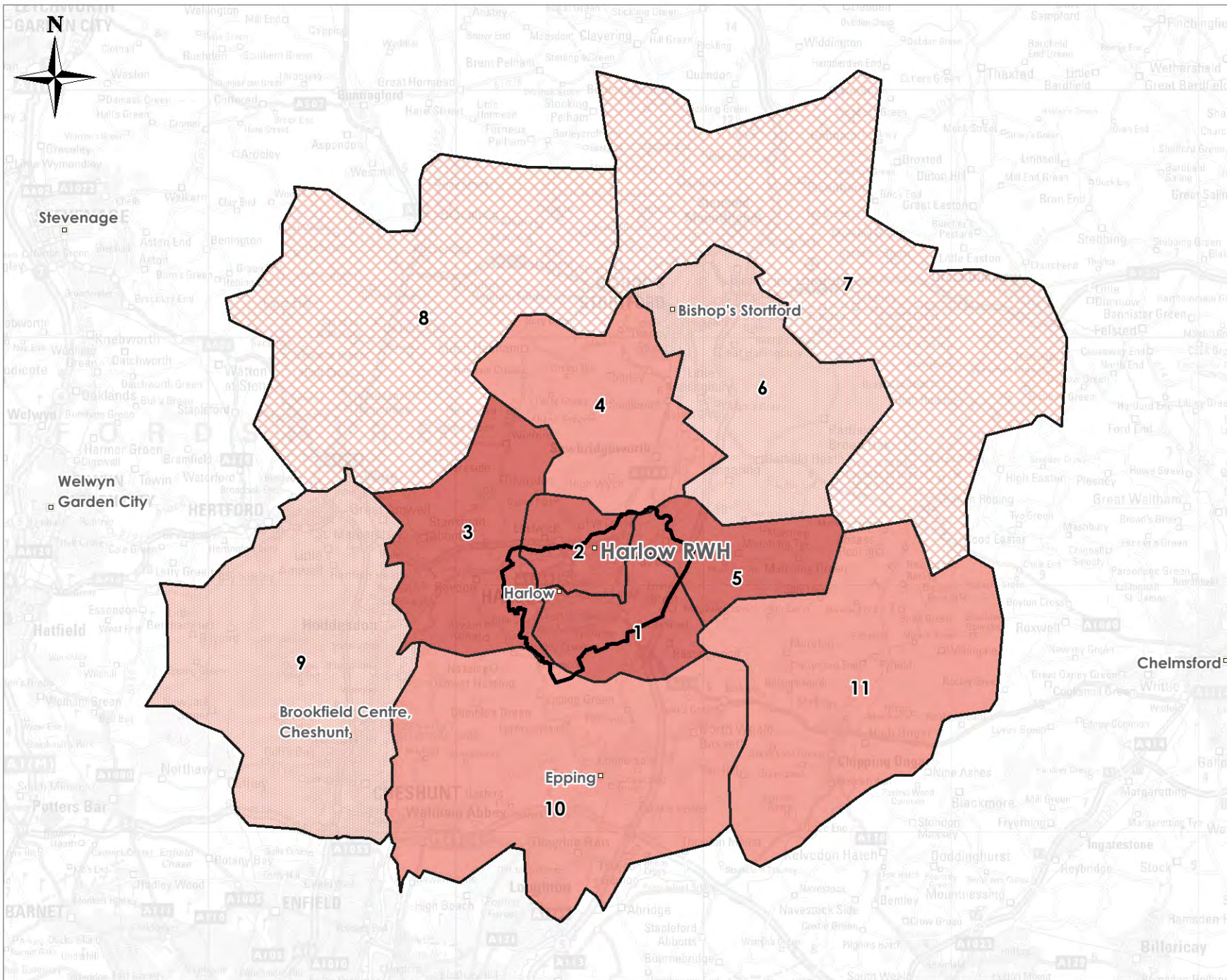
**Key**

- Harlow district boundary

**Comparison goods market share (%)**

- 1 - 5%
- 5 - 10%
- 10 - 15%
- 15 - 25%
- 25 - 40%
- 40 - 55%

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### Harlow Retail Study 2016

#### Key

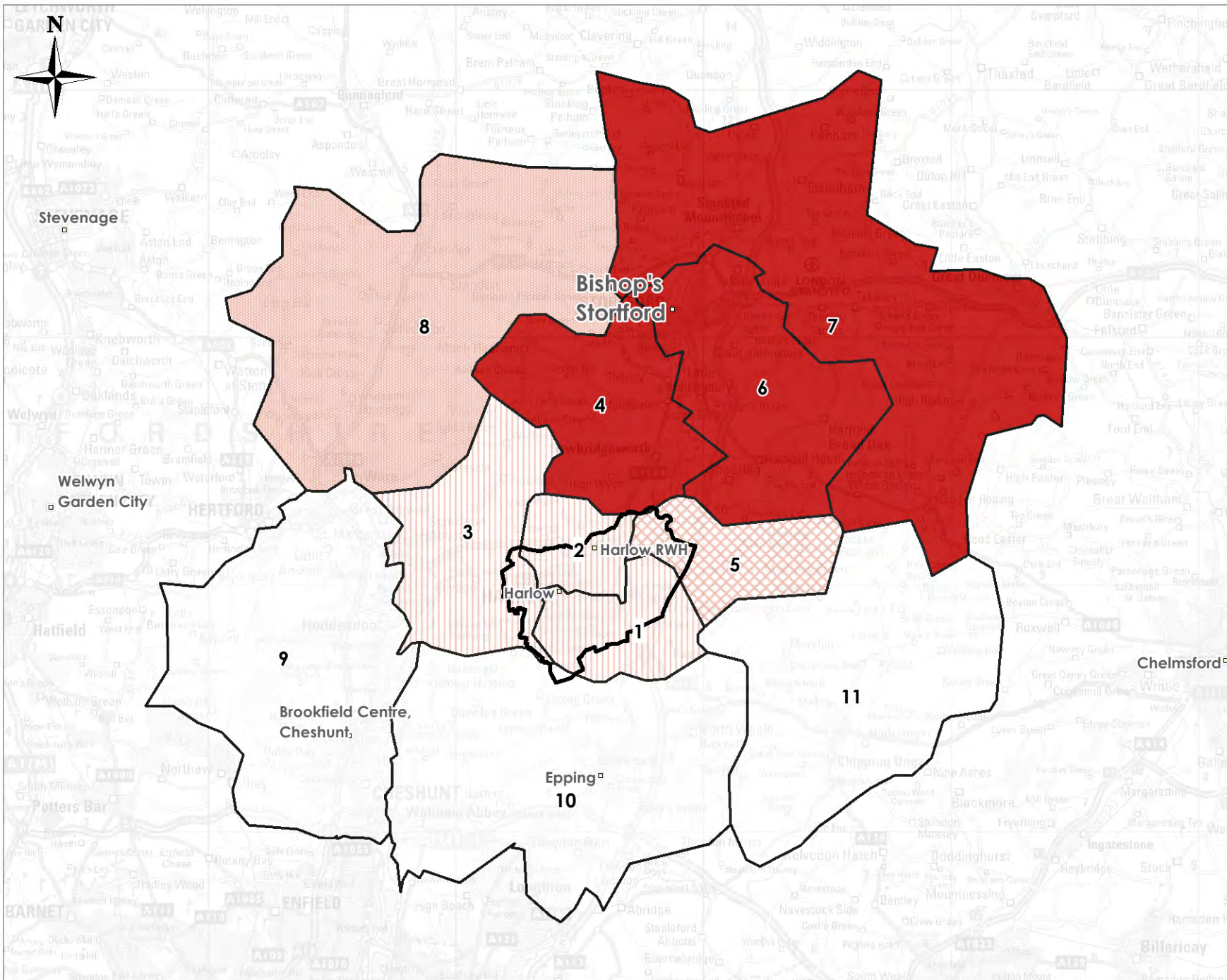
□ Harlow district boundary

Comparison goods market share (%)

- ▨ 1 - 5%
- ▨ 5 - 10%
- ▨ 10 - 15%
- ▨ 15 - 25%
- ▨ 25 - 40%
- ▨ 40 - 55%

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### Harlow Retail Study 2016

#### Key

□ Harlow district boundary

Comparison goods market share (%)

▨ 1 - 5%

▩ 5 - 10%

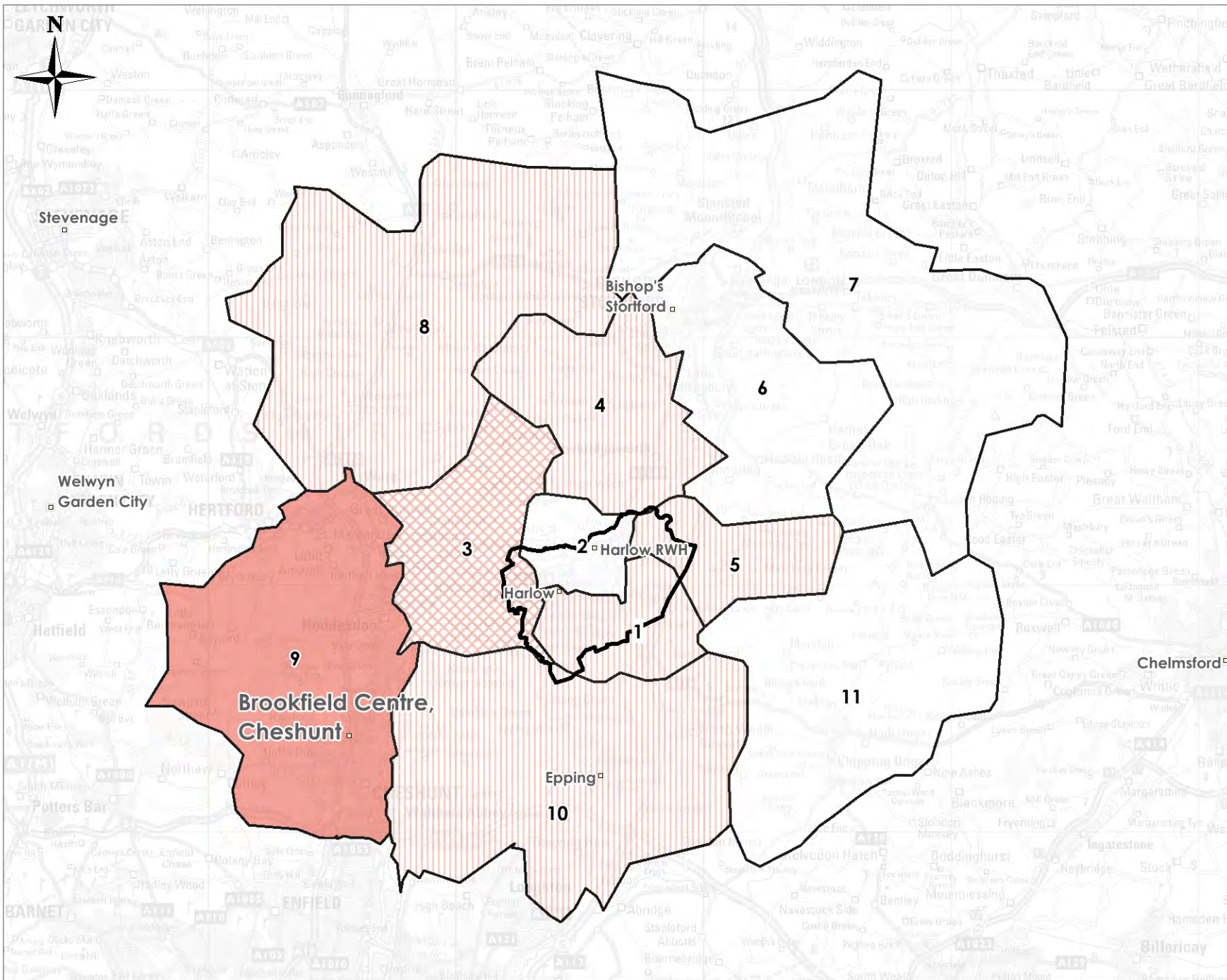
▧ 10 - 15%

▦ 15 - 25%

▤ 25 - 40%

▣ 40 - 55%

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### Harlow Retail Study 2016

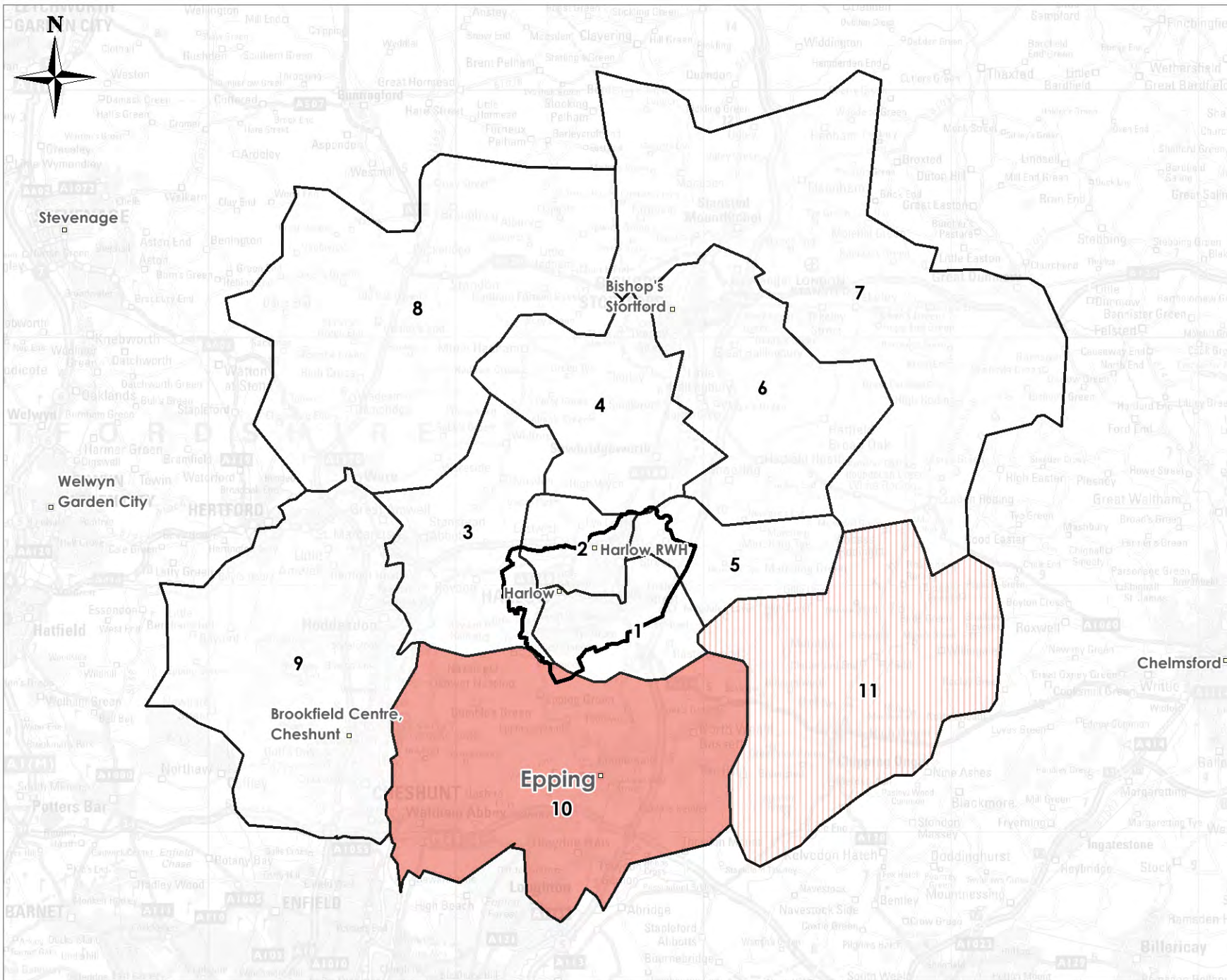
#### Key

□ Harlow district boundary

Comparison goods market share (%)

- ▨ 1 - 5%
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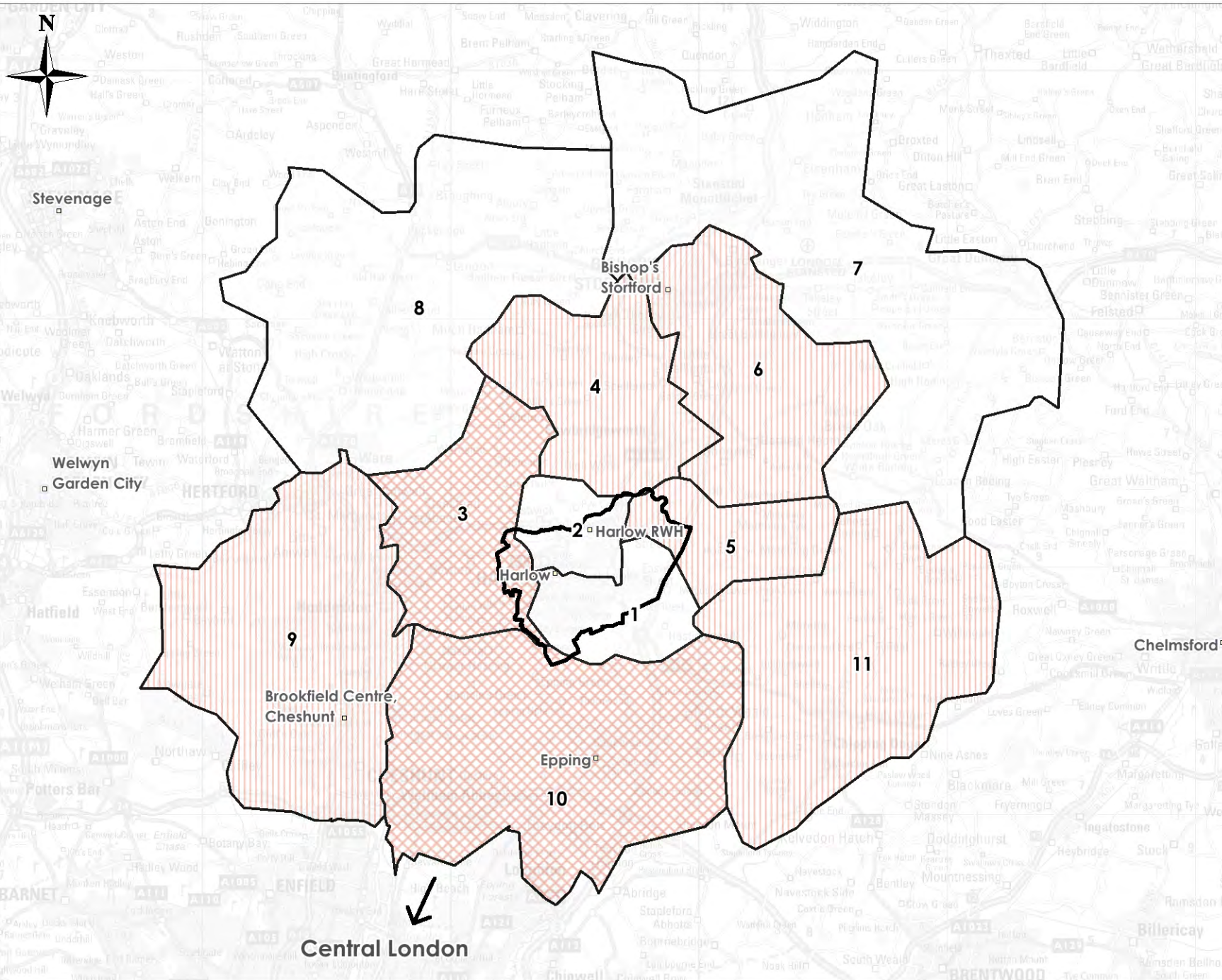
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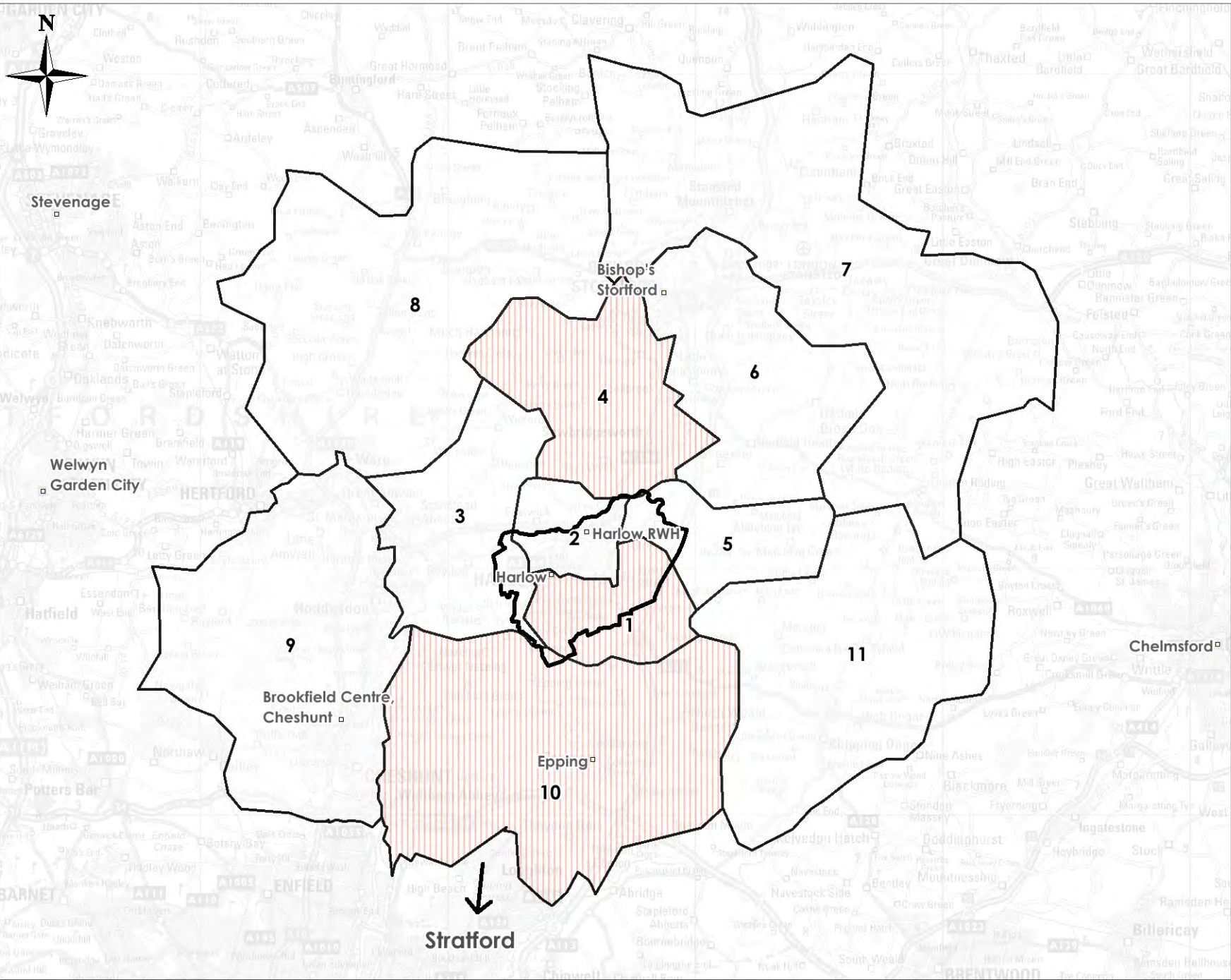
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**Harlow Retail Study 2016**

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**Harlow Retail Study 2016**

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  - 25 - 40 %
  - 40 - 55 %

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**Plan 10: Strafford (inc. Westfield) comparison goods market share**

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### Harlow Retail Study 2016

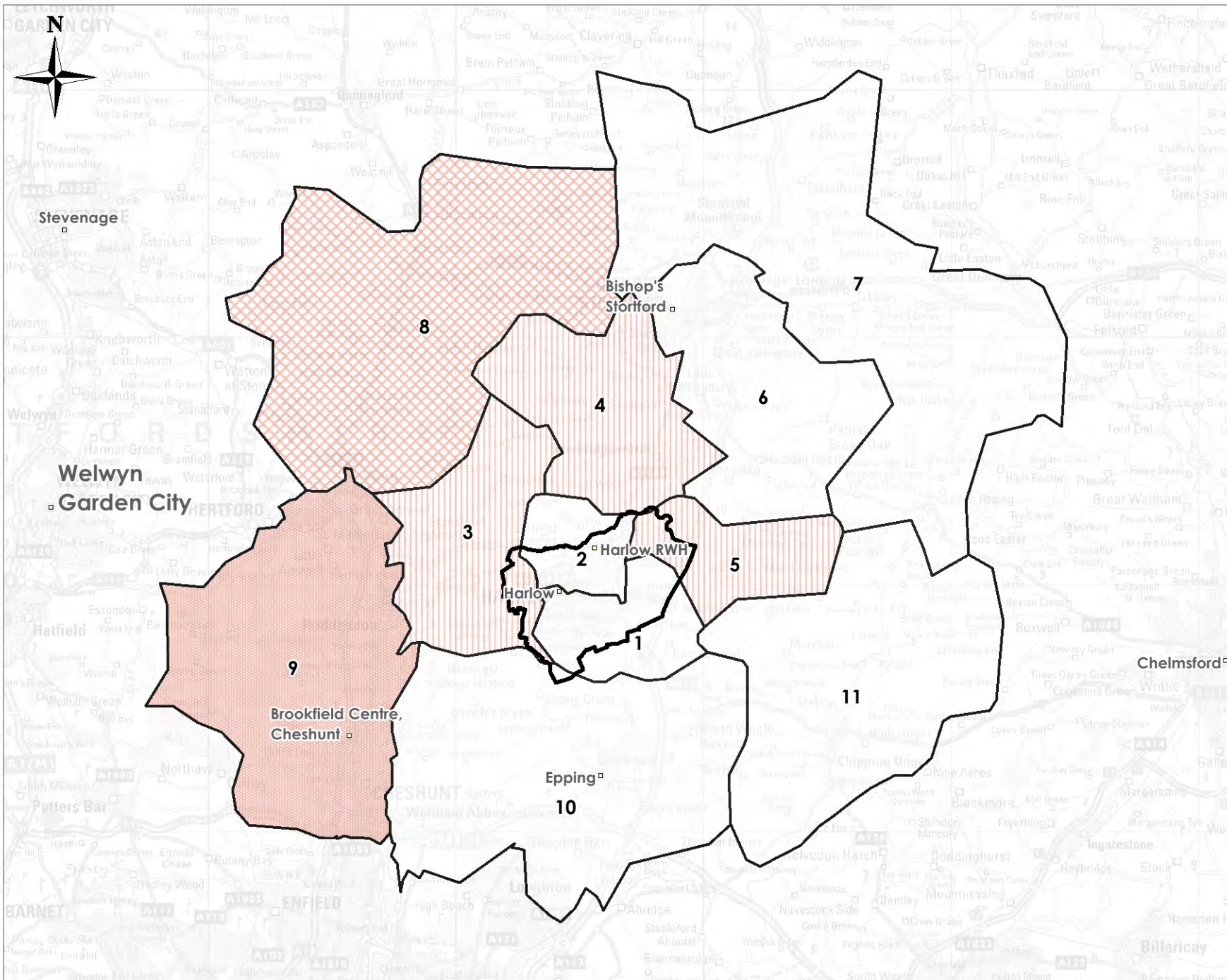
#### Key

□ Harlow district boundary

Comparison goods market share (%)

- ▨ 1 - 5 %
- ▨ 5 - 10 %
- ▨ 10 - 15 %
- ▨ 15 - 25 %
- ▨ 25 - 40 %
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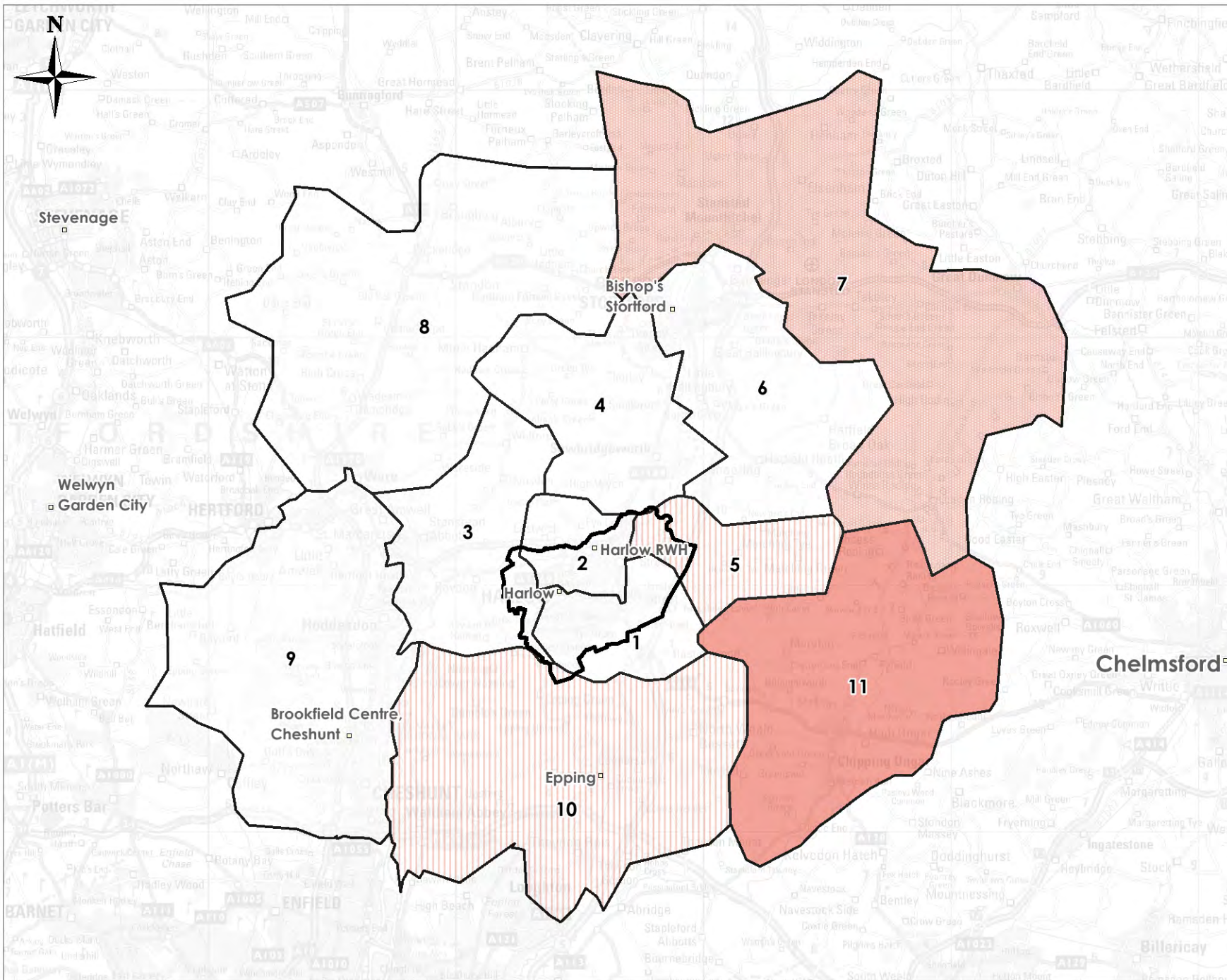
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**Harlow Retail Study 2016**

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### Harlow Retail Study 2016

#### Key

□ Harlow district boundary

Comparison goods market share (%)

▨ 1 - 5%

▨ 5 - 10%

▨ 10 - 15%

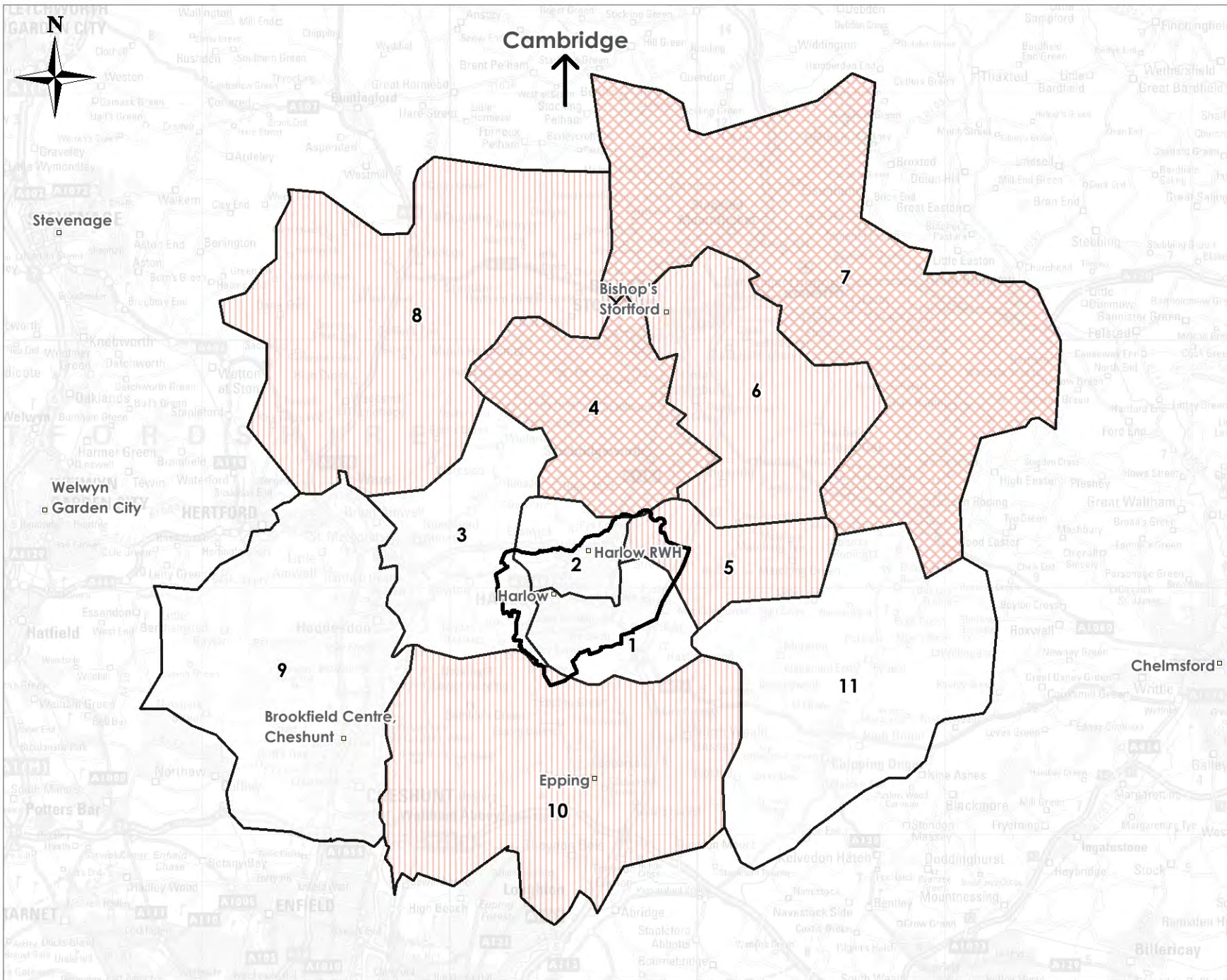
▨ 15 - 25%

▨ 25 - 40%

▨ 40 - 55%

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### Harlow Retail Study 2016

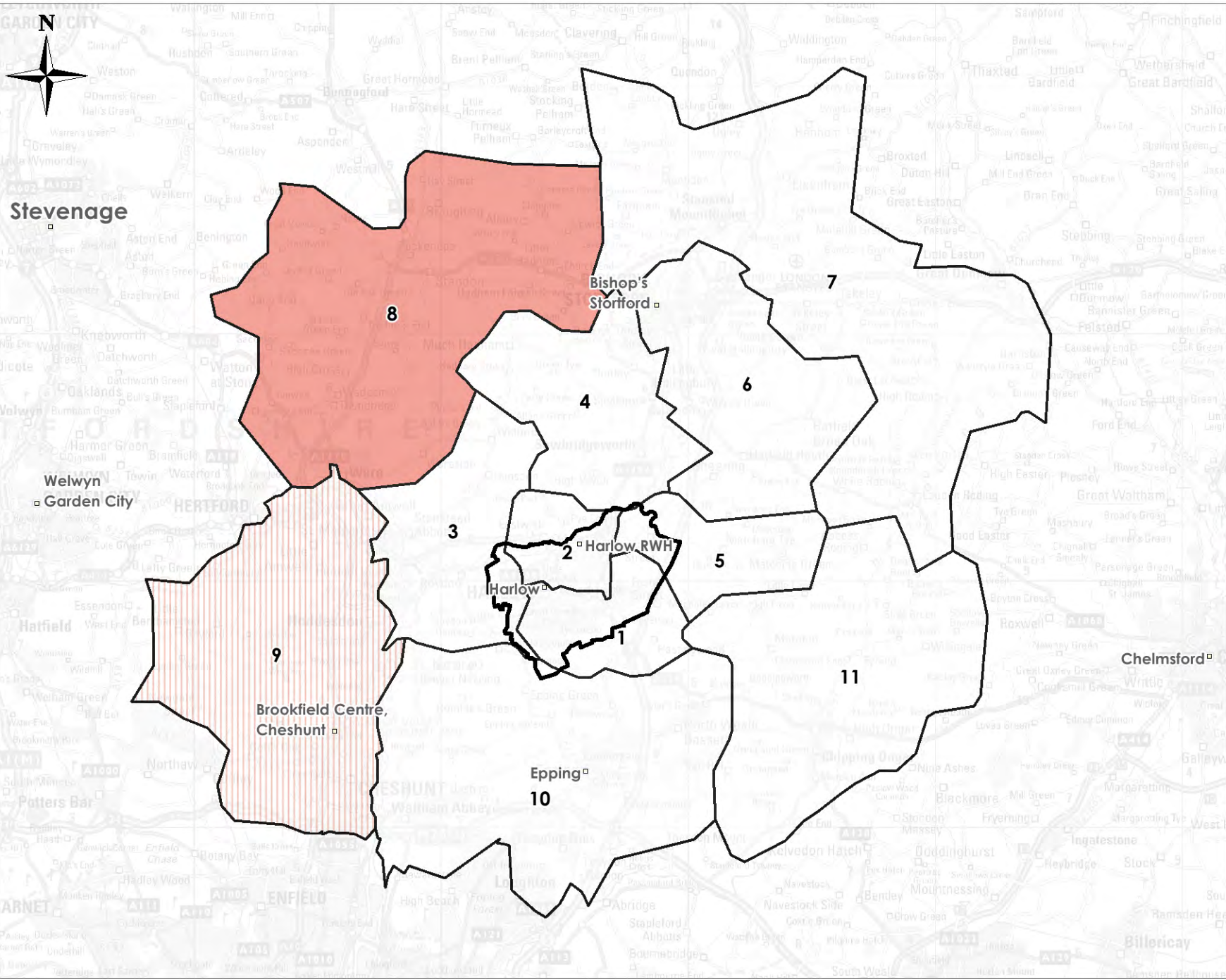
#### Key

□ Harlow district boundary

Comparison goods market share (%)

- ▨ 1 - 5 %
- ▨ 5 - 10 %
- ▨ 10 - 15 %
- ▨ 15 - 25 %
- ▨ 25 - 40 %
- ▨ 40 - 55 %

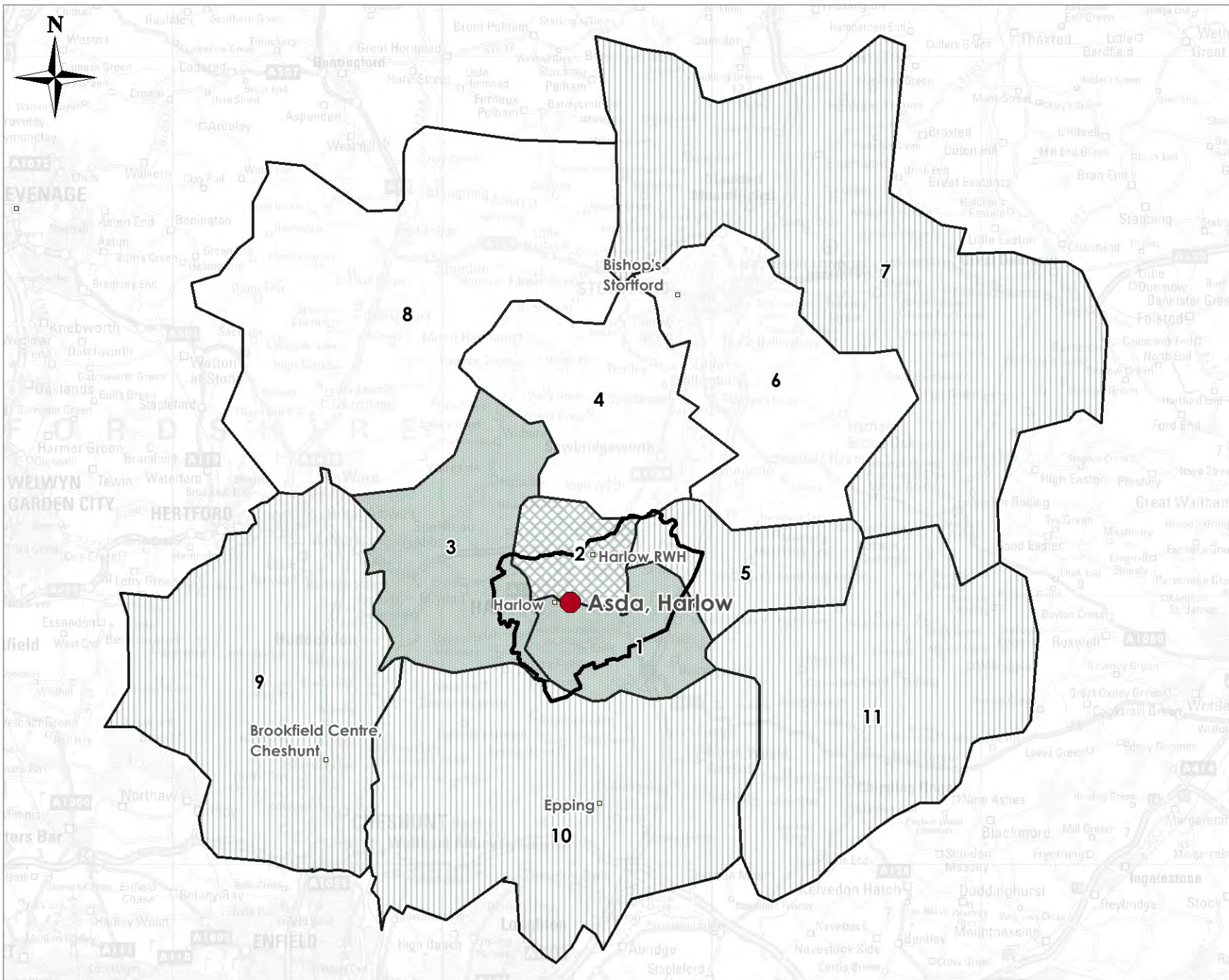
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**Harlow Retail Study 2016**

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  - 15 - 25 %
  - 25 - 40 %
  - 40 - 55 %

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**Harlow Retail Study 2016**

- Key**
- Harlow district boundary
  - Convenience goods market share (%)**
  - 1 - 5 %
  - 5 - 10 %
  - 10 - 15 %
  - 15 - 20 %
  - 20 - 25 %
  - 25 - 30 %

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### Harlow Retail Study 2016

#### Key

□ Harlow district boundary

Convenience goods market share (%)

- 1 - 5 %
- ▨ 5 - 10 %
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- 15 - 20 %
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- 25 - 30 %

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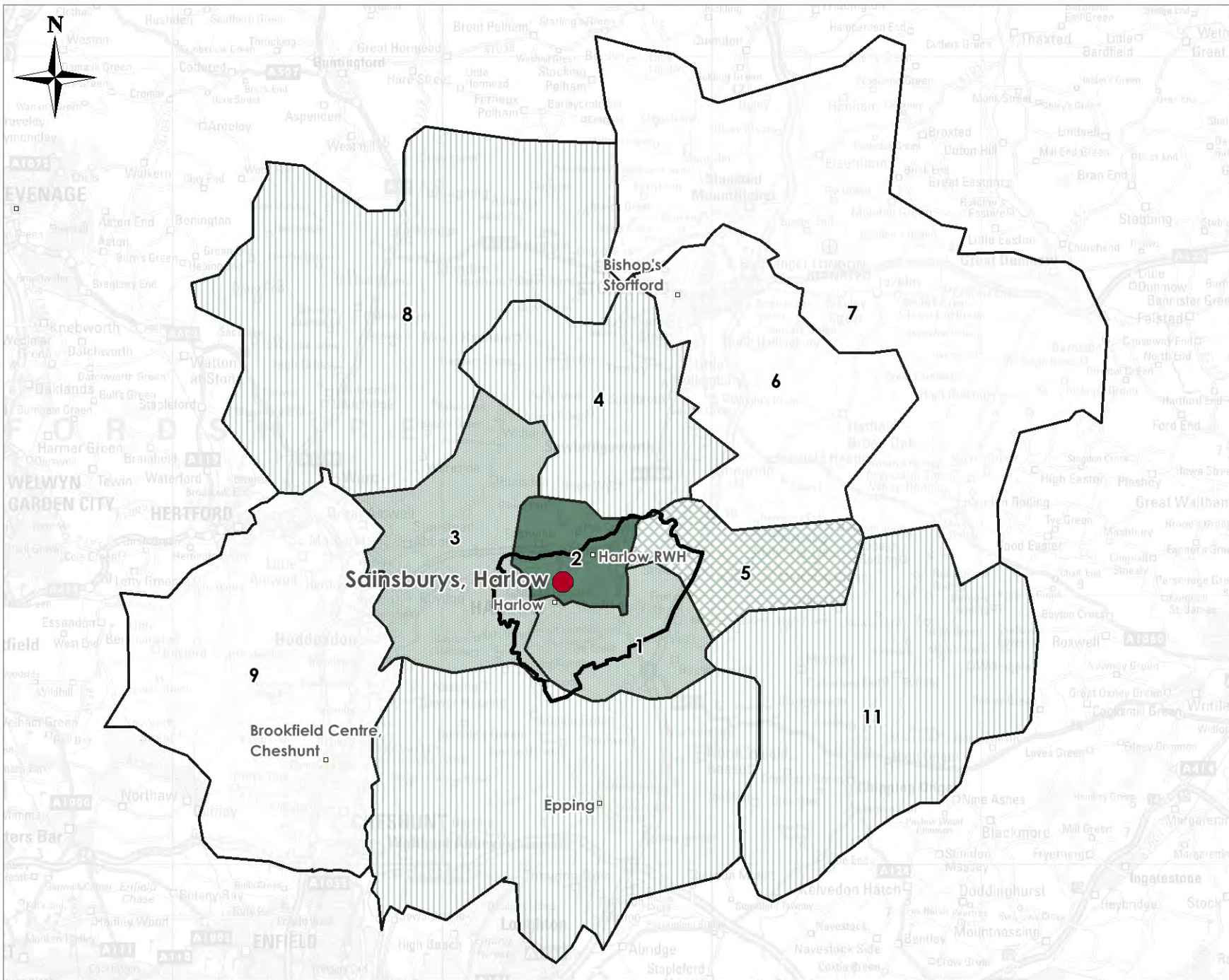


### Harlow Retail Study 2016

- Key**
- Harlow district boundary
  - Convenience goods market share (%)**
  - 1 - 5 %
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  - 10 - 15 %
  - 15 - 20 %
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  - 25 - 30 %



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### Harlow Retail Study 2016

#### Key

□ Harlow district boundary

Convenience goods market share (%)

▨ 1 - 5 %

▩ 5 - 10 %

▧ 10 - 15 %

■ 15 - 20 %

■ 20 - 25 %

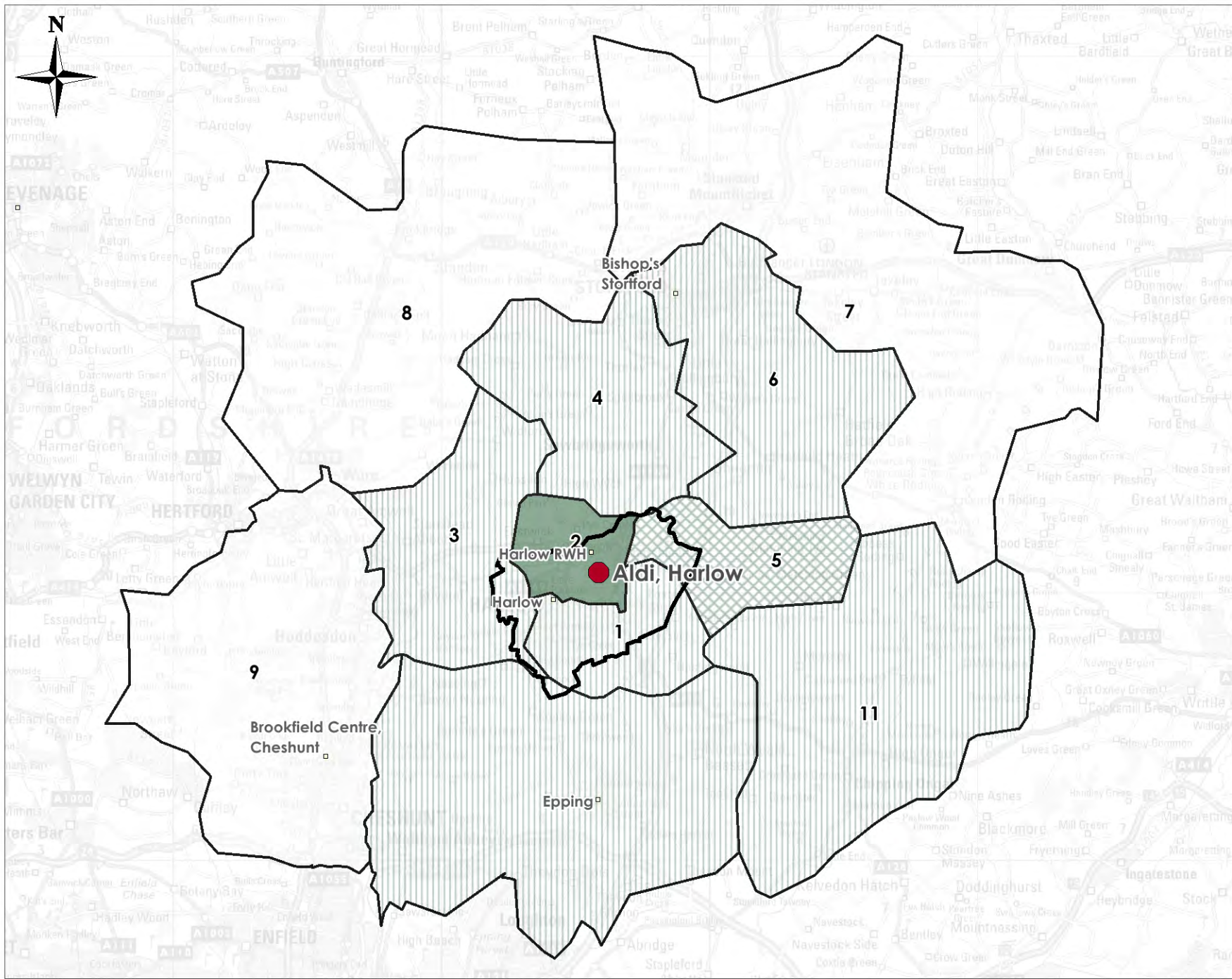
■ 25 - 30 %

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### Harlow Retail Study 2016

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### Harlow Retail Study 2016

- Key**
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# COMPARISON GOODS MODELLING

Harlow Retail Study 2016  
Comparison capacity modelling

Table 1: Population forecasts — MEDIUM GROWTH SCENARIO

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Total
2015	43,368	22,594	21,900	26,783	7,234	34,136	30,158	27,148	118,613	56,589	11,166	399,689
2016	43,693	22,782	22,090	27,023	7,277	34,518	30,631	27,469	119,649	57,090	11,264	403,486
2021	45,420	23,767	23,161	28,334	7,509	36,511	33,053	29,022	125,021	59,788	11,820	423,406
2026	48,641	28,136	24,503	29,596	9,426	38,311	35,490	30,449	130,378	62,671	12,403	450,003
2031	51,862	32,505	25,844	30,824	11,342	39,900	37,491	31,680	135,415	65,412	12,973	475,249
2033	53,150	34,253	26,381	31,315	12,109	40,536	38,291	32,172	137,430	66,508	13,201	485,347
Change 2016-33	9,457	11,471	4,291	4,292	4,832	6,018	7,660	4,703	17,781	9,418	1,937	81,861

Source: Experian Micromarketer - forecasts for all zones 2015 to 2021 inclusive, and zones 4 and 6-11 inclusive for 2021 to 2033. NLP/Harlow Council for zones 1, 2, 3 and 5 for 2021-33 inclusive.

	denotes zones wholly/partly within Harlow District
red text	denotes adjusted population forecast to take into account housing growth within/surrounding Harlow urban area

Survey area postcode sectors

Zone	Postal Sectors
Zone 1	CM17 9, CM18 6, CM18 7, CM19 4
Zone 2	CM20 1, CM20 2, CM20 3
Zone 3	CM19 5, EM11 0, SG12 8
Zone 4	CM21 0, CM21 9, CM23 4, SG10 6
Zone 5	CM17 0
Zone 6	CM22 7, CM23 2, CM23 3, CM23 5
Zone 7	CM22 6, CM32 1, CM24 1, CM24 8, CM6 1
Zone 8	SG11 1, SG11 2, SG12 0, SG12 7
Zone 9	EN10 6, EN10 7, EN11 8, EN11 9, EN7 5, EN7 6, EN8 0, EN8 7, EN8 8, EN8 9, SG12 9, SG13 7, SG13 8, SG14 1
Zone 10	CM16 4, CM16 5, CM16 6, CM16 7, EN9 1, EN9 2, EN9 3, IG10 2
Zone 11	CM5 0, CM5 9

Harlow Retail Study 2016  
Comparison capacity modelling

Table 2: Comparison goods per capita expenditure by survey zone (2014 prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
	(£)	(£)	(£)	(£)	(£)	(£)	(£)	(£)	(£)	(£)	(£)
2014	2,681	2,535	3,252	3,984	3,525	3,601	3,791	3,756	3,341	3,432	3,937
2016	3,007	2,843	3,647	4,468	3,953	4,038	4,251	4,211	3,747	3,849	4,414
<b>2016 Minus SFT at 13.2%</b>	<b>2,610</b>	<b>2,467</b>	<b>3,166</b>	<b>3,878</b>	<b>3,431</b>	<b>3,505</b>	<b>3,690</b>	<b>3,655</b>	<b>3,252</b>	<b>3,341</b>	<b>3,831</b>
2021	3,375	3,190	4,093	5,015	4,437	4,533	4,772	4,727	4,205	4,320	4,954
<b>2021 Minus SFT at 15.6%</b>	<b>2,848</b>	<b>2,693</b>	<b>3,455</b>	<b>4,232</b>	<b>3,745</b>	<b>3,825</b>	<b>4,027</b>	<b>3,989</b>	<b>3,549</b>	<b>3,646</b>	<b>4,181</b>
2026	3,935	3,720	4,773	5,847	5,174	5,285	5,564	5,512	4,903	5,037	5,777
<b>2026 Minus SFT at 16.1%</b>	<b>3,302</b>	<b>3,121</b>	<b>4,004</b>	<b>4,906</b>	<b>4,341</b>	<b>4,434</b>	<b>4,668</b>	<b>4,624</b>	<b>4,114</b>	<b>4,226</b>	<b>4,847</b>
2031	4,606	4,355	5,587	6,844	6,056	6,187	6,513	6,452	5,739	5,896	6,762
<b>2031 Minus SFT at 16.3%</b>	<b>3,855</b>	<b>3,645</b>	<b>4,676</b>	<b>5,729</b>	<b>5,069</b>	<b>5,178</b>	<b>5,451</b>	<b>5,400</b>	<b>4,804</b>	<b>4,935</b>	<b>5,660</b>
2033	4,906	4,638	5,950	7,290	6,450	6,589	6,936	6,871	6,113	6,279	7,202
<b>2033 Minus SFT at 16.4%</b>	<b>4,101</b>	<b>3,877</b>	<b>4,974</b>	<b>6,094</b>	<b>5,392</b>	<b>5,508</b>	<b>5,799</b>	<b>5,744</b>	<b>5,110</b>	<b>5,250</b>	<b>6,021</b>

Expenditure growth rates: 2014-15: 7.2%; 2015-16: 4.6%; 2016-17: 3.3%; 2017-18: 1.4%; 2018-19: 1.0%; 2019-23: 3.0%pa; 2024-33: 3.2%pa

Source: Experian E-Marketer, October 2014. Growth rates and allowance for SFT are derived from Experian Retail Planner 14, November 2016

Table 3: Total comparison goods expenditure available to survey area (2014 prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Total
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
<b>2016</b>	114.0	56.2	69.9	104.8	25.0	121.0	113.0	100.4	389.1	190.7	43.2	<b>1,327.4</b>
<b>2021</b>	129.4	64.0	80.0	119.9	28.1	139.7	133.1	115.8	443.7	218.0	49.4	<b>1,521.1</b>
<b>2026</b>	160.6	87.8	98.1	145.2	40.9	169.9	165.7	140.8	536.3	264.8	60.1	<b>1,870.3</b>
<b>2031</b>	199.9	118.5	120.9	176.6	57.5	206.6	204.4	171.1	650.5	322.8	73.4	<b>2,302.2</b>
<b>2033</b>	218.0	132.8	131.2	190.8	65.3	223.3	222.0	184.8	702.3	349.1	79.5	<b>2,499.2</b>
<b>Change 2016-33</b>	<b>103.9</b>	<b>76.6</b>	<b>61.3</b>	<b>86.0</b>	<b>40.3</b>	<b>102.3</b>	<b>109.0</b>	<b>84.4</b>	<b>313.2</b>	<b>158.4</b>	<b>36.3</b>	<b>1,171.8</b>

Source: Tables 1 & 2

Source: NEMS Market Research Telephone Survey, April 2016

Harlow Retail Study 2016  
Comparison capacity modelling

Table 4: Comparison goods allocation 2016 (% market share)

Zone Centre/Store	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)	Zone 11 (%)
<b>Comparison goods floorspace in Harlow</b>											
<b>Harlow town centre</b>											
Harlow town centre (zone 2)	45.0%	46.5%	37.2%	14.3%	31.9%	17.1%	12.8%	21.6%	19.4%	17.3%	12.6%
Asda, Water Gardens, Harlow (zone 2)	2.7%	0.7%	1.1%	0.2%	1.4%	0.3%	0.0%	0.0%	0.0%	0.7%	1.1%
<b>Sub-total, Harlow town centre</b>	<b>47.7%</b>	<b>47.2%</b>	<b>38.3%</b>	<b>14.5%</b>	<b>33.3%</b>	<b>17.5%</b>	<b>12.8%</b>	<b>21.6%</b>	<b>19.4%</b>	<b>18.0%</b>	<b>13.7%</b>
<b>Neighbourhood centres</b>											
Church Langley (zone 1) (including Tesco store)	4.8%	1.2%	0.2%	0.2%	3.8%	1.0%	0.1%	0.2%	0.0%	1.0%	1.2%
Old Harlow (zone 1)	0.0%	0.1%	0.1%	0.0%	3.8%	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%
Other neighbourhood centres (zones 1 and 2)	0.9%	2.0%	0.6%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Sub-total, Harlow neighbourhood centres</b>	<b>5.7%</b>	<b>3.4%</b>	<b>0.9%</b>	<b>0.4%</b>	<b>7.7%</b>	<b>1.0%</b>	<b>0.1%</b>	<b>0.2%</b>	<b>0.0%</b>	<b>5.1%</b>	<b>1.2%</b>
<b>Edinburgh Way retail warehousing (out-of-centre)</b>											
Princes Gate Retail Park, Edinburgh Way, Harlow (zone 2)	12.0%	14.4%	14.7%	8.8%	11.0%	9.9%	3.2%	2.2%	2.9%	7.7%	9.3%
Harlow Retail Park, Edinburgh Way, Harlow (zone 2)	9.1%	13.0%	6.6%	8.0%	6.9%	2.7%	1.6%	6.4%	9.5%	4.2%	7.7%
Other retail warehousing, Edinburgh Way, Harlow (zone 2)	6.9%	7.1%	4.6%	4.1%	10.5%	2.1%	0.7%	1.2%	1.5%	3.6%	3.3%
<b>Sub-total, Edinburgh Way retail warehousing</b>	<b>27.9%</b>	<b>34.5%</b>	<b>25.9%</b>	<b>20.9%</b>	<b>28.4%</b>	<b>14.7%</b>	<b>5.5%</b>	<b>9.8%</b>	<b>13.8%</b>	<b>15.4%</b>	<b>20.3%</b>
<b>Other out-of-centre retail floorspace in Harlow</b>											
Sainsbury's, Fifth Allende Avenue, Harlow (zone 2)	1.7%	3.0%	0.5%	0.2%	1.3%	0.0%	0.0%	0.4%	0.0%	0.0%	0.6%
<b>Sub-total, comparison goods floorspace in Harlow (A)</b>	<b>83.1%</b>	<b>88.1%</b>	<b>65.6%</b>	<b>36.1%</b>	<b>70.7%</b>	<b>33.1%</b>	<b>18.4%</b>	<b>31.9%</b>	<b>33.2%</b>	<b>38.5%</b>	<b>35.8%</b>
<b>Comparison goods floorspace outside Harlow (within survey area)</b>											
<b>Bishop's Stortford</b>											
Bishop's Stortford town centre (zone 6)	1.4%	2.0%	1.2%	34.1%	6.0%	43.0%	34.9%	9.1%	0.0%	0.2%	1.2%
Bishop's Stortford foodstores and retail warehousing (zone 6)	0.2%	0.0%	0.0%	6.2%	0.4%	7.6%	7.4%	1.6%	0.0%	0.0%	0.8%
<b>Sub-total, Bishop's Stortford</b>	<b>1.6%</b>	<b>2.0%</b>	<b>1.2%</b>	<b>40.4%</b>	<b>6.3%</b>	<b>50.6%</b>	<b>42.3%</b>	<b>10.7%</b>	<b>0.0%</b>	<b>0.2%</b>	<b>2.0%</b>
<b>Brookfield Centre, Cheshunt</b>											
Brookfield Centre, Cheshunt	1.5%	0.8%	6.0%	1.1%	3.7%	0.7%	0.0%	2.9%	19.1%	3.8%	0.3%
Tesco Extra, Brookfield Centre, Cheshunt	0.1%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	1.1%	2.4%	0.5%	0.0%
<b>Sub-total, Brookfield Centre, Cheshunt</b>	<b>1.6%</b>	<b>0.8%</b>	<b>6.2%</b>	<b>1.1%</b>	<b>3.7%</b>	<b>0.7%</b>	<b>0.0%</b>	<b>4.1%</b>	<b>21.5%</b>	<b>4.3%</b>	<b>0.3%</b>
<b>Epping</b>											
Epping town centre	0.2%	0.2%	0.2%	0.0%	0.8%	0.4%	0.0%	0.0%	0.0%	10.0%	1.8%
Tesco, High Street, Epping	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.3%	0.0%
<b>Sub-total, Epping</b>	<b>0.4%</b>	<b>0.2%</b>	<b>0.2%</b>	<b>0.0%</b>	<b>0.8%</b>	<b>0.4%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>15.4%</b>	<b>1.8%</b>
<b>Other locations in survey area</b>											
Hoddeston	0.0%	0.2%	5.0%	0.0%	0.0%	0.0%	0.0%	1.0%	5.5%	1.0%	0.0%
Ware	0.0%	0.0%	3.0%	0.3%	0.3%	0.0%	0.0%	14.2%	0.9%	0.0%	0.0%
Hertford	0.1%	0.0%	0.9%	0.2%	0.1%	0.0%	0.0%	3.4%	8.4%	0.0%	0.0%
Waltham Cross	0.2%	0.1%	0.9%	1.0%	0.4%	0.5%	0.4%	0.5%	4.8%	3.2%	0.7%
Chipping Ongar	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.7%
All other locations in survey area	0.1%	0.1%	2.0%	2.9%	0.3%	0.4%	6.6%	2.2%	1.3%	7.0%	0.5%
<b>Sub-total, other comparison goods floorspace in survey area (B)</b>	<b>4.0%</b>	<b>3.3%</b>	<b>19.2%</b>	<b>45.9%</b>	<b>12.1%</b>	<b>52.6%</b>	<b>49.3%</b>	<b>36.1%</b>	<b>42.5%</b>	<b>31.1%</b>	<b>19.1%</b>
<b>Comparison goods floorspace outside Harlow (outside survey area)</b>											
<b>London</b>											
Central London	0.4%	0.9%	5.2%	2.7%	1.4%	1.3%	0.9%	0.8%	1.6%	6.2%	3.7%
Stratford (including Westfield Stratford City)	2.3%	0.5%	0.0%	2.0%	0.6%	0.8%	0.1%	0.3%	0.7%	3.9%	0.7%
All other locations in London	1.9%	2.0%	0.3%	0.1%	0.1%	0.4%	0.4%	1.1%	6.5%	7.7%	0.7%
<b>Sub-total, London</b>	<b>4.6%</b>	<b>3.3%</b>	<b>5.5%</b>	<b>4.9%</b>	<b>2.1%</b>	<b>2.5%</b>	<b>1.4%</b>	<b>2.2%</b>	<b>8.9%</b>	<b>17.8%</b>	<b>5.1%</b>
<b>Other locations outside survey area</b>											
Lakeside (Shopping Centre & Retail Parks)	6.1%	3.6%	3.5%	3.5%	3.8%	2.9%	2.6%	1.1%	1.7%	1.9%	5.9%
Welwyn Garden City	0.6%	0.0%	4.0%	1.6%	2.2%	0.7%	0.3%	7.0%	10.4%	0.7%	0.2%
Chelmsford	0.1%	0.4%	0.0%	0.5%	1.7%	0.7%	14.5%	0.0%	0.1%	2.3%	24.6%
Cambridge	0.7%	0.0%	0.1%	5.0%	3.6%	4.0%	7.9%	2.8%	0.0%	1.1%	0.6%
Stevenage	0.1%	0.1%	0.1%	0.3%	0.1%	0.4%	0.0%	16.3%	1.1%	0.0%	0.3%
All other locations outside survey area	0.6%	1.2%	2.0%	2.3%	3.8%	3.2%	5.6%	2.7%	2.2%	6.6%	8.3%
<b>Sub-total, other locations</b>	<b>8.2%</b>	<b>5.3%</b>	<b>9.6%</b>	<b>13.1%</b>	<b>15.1%</b>	<b>11.8%</b>	<b>30.9%</b>	<b>29.8%</b>	<b>15.4%</b>	<b>12.6%</b>	<b>40.0%</b>
<b>Sub-total, comparison goods floorspace outside survey area (C)</b>	<b>12.8%</b>	<b>8.6%</b>	<b>15.1%</b>	<b>18.0%</b>	<b>17.3%</b>	<b>14.3%</b>	<b>32.3%</b>	<b>32.1%</b>	<b>24.3%</b>	<b>30.4%</b>	<b>45.1%</b>
<b>OVERALL TOTAL (A+B+C)</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Source: NEMS Market Research Telephone Survey, April 2016

denotes zones wholly/partly within Harlow District

Harlow Retail Study 2016  
Comparison capacity modelling

Table 5a: Comparison goods allocation 2016 - spend (£m) (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Total (£m)	Total (%)
<b>Total available comparison goods spend – 2016</b>	<b>114.0</b>	<b>56.2</b>	<b>69.9</b>	<b>104.8</b>	<b>25.0</b>	<b>121.0</b>	<b>113.0</b>	<b>100.4</b>	<b>389.1</b>	<b>190.7</b>	<b>43.2</b>	<b>1,327.4</b>	<b>100.0</b>
<b>Comparison goods floorspace in Harlow</b>													
<b>Harlow town centre</b>													
Harlow town centre (zone 2)	51.3	26.1	26.0	15.0	8.0	20.7	14.4	21.6	75.4	32.9	5.4	297.0	22.4%
Asda, Water Gardens, Harlow (zone 2)	3.1	0.4	0.8	0.2	0.3	0.4	0.0	0.0	0.0	1.4	0.5	7.2	0.5%
<b>Sub-total, Harlow town centre</b>	<b>54.4</b>	<b>26.5</b>	<b>26.8</b>	<b>15.2</b>	<b>8.3</b>	<b>21.2</b>	<b>14.4</b>	<b>21.6</b>	<b>75.4</b>	<b>34.3</b>	<b>5.9</b>	<b>304.2</b>	<b>22.9%</b>
<b>Neighbourhood centres</b>													
Church Langley (zone 1) (including Tesco store)	5.5	0.7	0.1	0.2	0.9	1.2	0.2	0.2	0.0	1.9	0.5	11.4	0.9%
Old Harlow (zone 1)	0.0	0.1	0.1	0.0	1.0	0.0	0.0	0.0	0.0	7.7	0.0	8.8	0.7%
Other neighbourhood centres (zones 1 and 2)	1.1	1.2	0.4	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.9	0.2%
<b>Sub-total, Harlow neighbourhood centres</b>	<b>6.5</b>	<b>1.9</b>	<b>0.6</b>	<b>0.4</b>	<b>1.9</b>	<b>1.2</b>	<b>0.2</b>	<b>0.2</b>	<b>0.0</b>	<b>9.7</b>	<b>0.5</b>	<b>23.1</b>	<b>1.7%</b>
<b>Edinburgh Way retail warehousing (out-of-centre)</b>													
Princes Gate Retail Park, Edinburgh Way, Harlow (zone 2)	13.7	8.1	10.3	9.2	2.7	11.9	3.7	2.2	11.2	14.7	4.0	91.6	6.9%
Harlow Retail Park, Edinburgh Way, Harlow (zone 2)	10.3	7.3	4.6	8.4	1.7	3.3	1.8	6.4	36.8	8.0	3.3	92.1	6.9%
Other retail warehousing, Edinburgh Way, Harlow (zone 2)	7.9	4.0	3.2	4.3	2.6	2.5	0.8	1.2	5.9	6.8	1.4	40.6	3.1%
<b>Sub-total, Edinburgh Way retail warehousing</b>	<b>31.9</b>	<b>19.4</b>	<b>18.1</b>	<b>21.9</b>	<b>7.1</b>	<b>17.8</b>	<b>6.2</b>	<b>9.8</b>	<b>53.8</b>	<b>29.4</b>	<b>8.8</b>	<b>224.2</b>	<b>16.9%</b>
<b>Other out-of-centre retail floorspace in Harlow</b>													
Sainsbury's, Fifth Allende Avenue, Harlow (zone 2)	2.0	1.7	0.3	0.3	0.3	0.0	0.0	0.4	0.0	0.0	0.3	5.2	0.4%
<b>Sub-total, comparison goods floorspace in Harlow (A)</b>	<b>94.8</b>	<b>49.5</b>	<b>45.9</b>	<b>37.9</b>	<b>17.6</b>	<b>40.1</b>	<b>20.8</b>	<b>32.0</b>	<b>129.2</b>	<b>73.4</b>	<b>15.5</b>	<b>556.7</b>	<b>41.9%</b>
<b>Comparison goods floorspace outside Harlow (within survey area)</b>													
<b>Bishop's Stortford</b>													
Bishop's Stortford town centre (zone 6)	1.6	1.1	0.8	35.8	1.5	52.0	39.5	9.2	0.0	0.4	0.5	142.5	10.7%
Bishop's Stortford foodstores and retail warehousing (zone 6)	0.2	0.0	0.0	6.5	0.1	9.2	8.4	1.6	0.0	0.0	0.4	26.3	2.0%
<b>Sub-total, Bishop's Stortford</b>	<b>1.8</b>	<b>1.1</b>	<b>0.8</b>	<b>42.3</b>	<b>1.6</b>	<b>61.2</b>	<b>47.8</b>	<b>10.7</b>	<b>0.0</b>	<b>0.4</b>	<b>0.9</b>	<b>168.7</b>	<b>12.7%</b>
<b>Brookfield Centre, Cheshunt</b>													
Brookfield Centre, Cheshunt	1.7	0.4	4.2	1.1	0.9	0.8	0.0	2.9	74.3	7.3	0.1	93.8	7.1%
Tesco Extra, Brookfield Centre, Cheshunt	0.1	0.0	0.2	0.0	0.0	0.0	0.0	1.1	9.5	0.9	0.0	11.8	0.9%
<b>Sub-total, Brookfield Centre, Cheshunt</b>	<b>1.8</b>	<b>0.4</b>	<b>4.4</b>	<b>1.1</b>	<b>0.9</b>	<b>0.8</b>	<b>0.0</b>	<b>4.1</b>	<b>83.8</b>	<b>8.2</b>	<b>0.1</b>	<b>105.6</b>	<b>8.0%</b>
<b>Epping</b>													
Epping town centre	0.2	0.1	0.1	0.0	0.2	0.5	0.0	0.0	0.0	19.2	0.8	21.0	1.6%
Tesco, High Street, Epping	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.1	0.0	10.4	0.8%
<b>Sub-total, Epping</b>	<b>0.5</b>	<b>0.1</b>	<b>0.1</b>	<b>0.0</b>	<b>0.2</b>	<b>0.5</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>29.3</b>	<b>0.8</b>	<b>31.4</b>	<b>2.4%</b>
<b>Other locations in survey area</b>													
Hoddeston	0.0	0.1	3.5	0.0	0.0	0.0	0.0	1.0	21.4	1.8	0.0	27.9	2.1%
Ware	0.0	0.0	2.1	0.3	0.1	0.0	0.0	14.2	3.5	0.0	0.0	20.2	1.5%
Hertford	0.1	0.0	0.6	0.2	0.0	0.0	0.0	3.4	32.8	0.0	0.0	37.1	2.8%
Waltham Cross	0.2	0.1	0.6	1.1	0.1	0.6	0.5	0.5	18.6	6.2	0.3	28.8	2.2%
Chipping Ongar	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.9	0.0	5.9	0.4%
All other locations in survey area	0.1	0.1	1.4	3.1	0.1	0.5	7.4	2.2	5.2	13.4	0.2	33.7	2.5%
<b>Sub-total, other comparison goods floorspace in survey area (B)</b>	<b>4.6</b>	<b>1.9</b>	<b>13.5</b>	<b>48.1</b>	<b>3.0</b>	<b>63.6</b>	<b>55.7</b>	<b>36.2</b>	<b>165.3</b>	<b>59.3</b>	<b>8.2</b>	<b>459.4</b>	<b>34.6%</b>
<b>Comparison goods floorspace outside Harlow (outside survey area)</b>													
<b>London</b>													
Central London	0.5	0.5	3.6	2.8	0.4	1.6	1.0	0.8	6.3	11.8	1.6	30.9	2.3%
Stratford (including Westfield Stratford City)	2.7	0.3	0.0	2.1	0.2	0.9	0.1	0.3	2.8	7.4	0.3	17.2	1.3%
All other locations in London	2.1	1.1	0.2	0.1	0.0	0.4	0.5	1.1	25.4	14.8	0.3	46.1	3.5%
<b>Sub-total, London</b>	<b>5.3</b>	<b>1.9</b>	<b>3.9</b>	<b>5.1</b>	<b>0.5</b>	<b>3.0</b>	<b>1.6</b>	<b>2.2</b>	<b>34.6</b>	<b>34.0</b>	<b>2.2</b>	<b>94.3</b>	<b>7.1%</b>
<b>Other locations outside survey area</b>													
Lakeside (Shopping Centre & Retail Parks)	6.9	2.0	2.4	3.6	0.9	3.5	2.9	1.1	6.5	3.7	2.6	36.2	2.7%
Welwyn Garden City	0.7	0.0	2.8	1.7	0.6	0.8	0.4	7.0	40.6	1.3	0.1	55.9	4.2%
Chelmsford	0.2	0.2	0.0	0.5	0.4	0.8	16.4	0.0	0.2	4.4	10.6	33.7	2.5%
Cambridge	0.8	0.0	0.1	5.2	0.9	4.8	9.0	2.8	0.0	2.1	0.3	25.9	2.0%
Stevenage	0.2	0.0	0.0	0.4	0.0	0.5	0.0	16.3	4.1	0.0	0.1	21.6	1.6%
All other locations outside survey area	0.7	0.7	1.4	2.4	1.0	3.9	6.3	2.7	8.6	12.6	3.6	43.7	3.3%
<b>Sub-total, other locations</b>	<b>9.3</b>	<b>3.0</b>	<b>6.7</b>	<b>13.8</b>	<b>3.8</b>	<b>14.3</b>	<b>34.9</b>	<b>29.9</b>	<b>60.0</b>	<b>24.0</b>	<b>17.2</b>	<b>217.0</b>	<b>16.3%</b>
<b>Sub-total, comparison goods floorspace outside survey area (C)</b>	<b>14.6</b>	<b>4.8</b>	<b>10.6</b>	<b>18.9</b>	<b>4.3</b>	<b>17.3</b>	<b>36.5</b>	<b>32.2</b>	<b>94.6</b>	<b>58.0</b>	<b>19.5</b>	<b>311.3</b>	<b>23.4%</b>
<b>OVERALL TOTAL (A+B+C)</b>	<b>114.0</b>	<b>56.2</b>	<b>69.9</b>	<b>104.8</b>	<b>25.0</b>	<b>121.0</b>	<b>113.0</b>	<b>100.4</b>	<b>389.1</b>	<b>190.7</b>	<b>43.2</b>	<b>1,327.4</b>	<b>100.0%</b>

Source: Table 3, Table 4

denotes zones wholly/partly within Harlow District

Harlow Retail Study 2016  
Comparison capacity modelling

Table 5b: Comparison goods allocation 2021 - spend (£m) (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Total (£m)	Total (%)
<b>Total available comparison goods spend - 2021</b>	<b>129.4</b>	<b>64.0</b>	<b>80.0</b>	<b>119.9</b>	<b>28.1</b>	<b>139.7</b>	<b>133.1</b>	<b>115.8</b>	<b>443.7</b>	<b>218.0</b>	<b>49.4</b>	<b>1,521.1</b>	<b>100.0</b>
<b>Comparison goods floorspace in Harlow</b>													
<b>Harlow town centre</b>													
Harlow town centre (zone 2)	58.2	29.7	29.8	17.1	9.0	24.0	17.0	25.0	86.0	37.6	6.2	339.6	22.3%
Asda, Water Gardens, Harlow (zone 2)	3.5	0.5	0.9	0.3	0.4	0.5	0.0	0.0	0.0	1.6	0.6	8.2	0.5%
<b>Sub-total, Harlow town centre</b>	<b>61.8</b>	<b>30.2</b>	<b>30.7</b>	<b>17.4</b>	<b>9.4</b>	<b>24.4</b>	<b>17.0</b>	<b>25.0</b>	<b>86.0</b>	<b>39.2</b>	<b>6.8</b>	<b>347.8</b>	<b>22.9%</b>
<b>Neighbourhood centres</b>													
Church Langley (zone 1) (including Tesco store)	6.2	0.8	0.1	0.3	1.1	1.3	0.2	0.2	0.0	2.2	0.6	13.0	0.9%
Old Harlow (zone 1)	0.0	0.1	0.1	0.0	1.1	0.0	0.0	0.0	0.0	8.8	0.0	10.1	0.7%
Other neighbourhood centres (zones 1 and 2)	1.2	1.3	0.5	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.3	0.2%
<b>Sub-total, Harlow neighbourhood centres</b>	<b>7.4</b>	<b>2.2</b>	<b>0.7</b>	<b>0.5</b>	<b>2.2</b>	<b>1.3</b>	<b>0.2</b>	<b>0.2</b>	<b>0.0</b>	<b>11.0</b>	<b>0.6</b>	<b>26.3</b>	<b>1.7%</b>
<b>Edinburgh Way retail warehousing (out-of-centre)</b>													
Princes Gate Retail Park, Edinburgh Way, Harlow (zone 2)	15.5	9.2	11.7	10.5	3.1	13.8	4.3	2.5	12.7	16.8	4.6	104.8	6.9%
Harlow Retail Park, Edinburgh Way, Harlow (zone 2)	11.7	8.3	5.3	9.6	1.9	3.8	2.1	7.4	41.9	9.1	3.8	105.2	6.9%
Other retail warehousing, Edinburgh Way, Harlow (zone 2)	8.9	4.5	3.7	5.0	2.9	2.9	0.9	1.4	6.7	7.8	1.6	46.3	3.0%
<b>Sub-total, Edinburgh Way retail warehousing</b>	<b>36.2</b>	<b>22.1</b>	<b>20.7</b>	<b>25.1</b>	<b>8.0</b>	<b>20.5</b>	<b>7.3</b>	<b>11.3</b>	<b>61.3</b>	<b>33.6</b>	<b>10.0</b>	<b>256.2</b>	<b>16.8%</b>
<b>Other out-of-centre retail floorspace in Harlow</b>													
Sainsbury's, Fifth Allende Avenue, Harlow (zone 2)	2.2	1.9	0.4	0.3	0.4	0.0	0.0	0.4	0.0	0.0	0.3	5.9	0.4%
<b>Sub-total, comparison goods floorspace in Harlow (A)</b>	<b>107.6</b>	<b>56.4</b>	<b>52.5</b>	<b>43.3</b>	<b>19.9</b>	<b>46.3</b>	<b>24.5</b>	<b>36.9</b>	<b>147.4</b>	<b>83.9</b>	<b>17.7</b>	<b>636.3</b>	<b>41.8%</b>
<b>Comparison goods floorspace outside Harlow (within survey area)</b>													
<b>Bishop's Stortford</b>													
Bishop's Stortford town centre (zone 6)	1.9	1.3	1.0	40.9	1.7	60.1	46.5	10.6	0.0	0.5	0.6	164.9	10.8%
Bishop's Stortford foodstores and retail warehousing (zone 6)	0.2	0.0	0.0	7.5	0.1	10.6	9.8	1.8	0.0	0.0	0.4	30.5	2.0%
<b>Sub-total, Bishop's Stortford</b>	<b>2.1</b>	<b>1.3</b>	<b>1.0</b>	<b>48.4</b>	<b>1.8</b>	<b>70.7</b>	<b>56.3</b>	<b>12.4</b>	<b>0.0</b>	<b>0.5</b>	<b>1.0</b>	<b>195.3</b>	<b>12.8%</b>
<b>Brookfield Centre, Cheshunt</b>													
Brookfield Centre, Cheshunt	1.9	0.5	4.8	1.3	1.0	0.9	0.0	3.4	84.7	8.3	0.2	107.1	7.0%
Tesco Extra, Brookfield Centre, Cheshunt	0.1	0.0	0.2	0.0	0.0	0.0	0.0	1.3	10.8	1.0	0.0	13.5	0.9%
<b>Sub-total, Brookfield Centre, Cheshunt</b>	<b>2.1</b>	<b>0.5</b>	<b>5.0</b>	<b>1.3</b>	<b>1.0</b>	<b>0.9</b>	<b>0.0</b>	<b>4.7</b>	<b>95.5</b>	<b>9.4</b>	<b>0.2</b>	<b>120.6</b>	<b>7.9%</b>
<b>Epping</b>													
Epping town centre	0.2	0.1	0.1	0.0	0.2	0.6	0.0	0.0	0.0	21.9	0.9	24.0	1.6%
Tesco, High Street, Epping	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	11.6	0.0	11.9	0.8%
<b>Sub-total, Epping</b>	<b>0.5</b>	<b>0.1</b>	<b>0.1</b>	<b>0.0</b>	<b>0.2</b>	<b>0.6</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>33.5</b>	<b>0.9</b>	<b>35.9</b>	<b>2.4%</b>
<b>Other locations in survey area</b>													
Hoddesdon	0.0	0.1	4.0	0.0	0.0	0.0	0.0	1.2	24.4	2.1	0.0	31.8	2.1%
Ware	0.0	0.0	2.4	0.3	0.1	0.0	0.0	16.4	3.9	0.0	0.0	23.2	1.5%
Hertford	0.2	0.0	0.7	0.2	0.0	0.0	0.0	3.9	37.4	0.0	0.0	42.4	2.8%
Waltham Cross	0.2	0.1	0.7	1.2	0.1	0.7	0.6	0.6	21.2	7.1	0.4	32.9	2.2%
Chipping Ongar	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.8	6.8	0.4%
All other locations in survey area	0.1	0.1	1.6	3.5	0.1	0.6	8.7	2.6	6.0	15.3	0.3	38.8	2.5%
<b>Sub-total, other comparison goods floorspace in survey area (B)</b>	<b>5.2</b>	<b>2.1</b>	<b>15.4</b>	<b>55.0</b>	<b>3.4</b>	<b>73.4</b>	<b>65.6</b>	<b>41.8</b>	<b>188.5</b>	<b>67.8</b>	<b>9.4</b>	<b>527.6</b>	<b>34.7%</b>
<b>Comparison goods floorspace outside Harlow (outside survey area)</b>													
<b>London</b>													
Central London	0.6	0.5	4.2	3.3	0.4	1.8	1.1	1.0	7.2	13.5	1.8	35.4	2.3%
Stratford (including Westfield Stratford City)	3.0	0.3	0.0	2.4	0.2	1.1	0.2	0.4	3.2	8.5	0.4	19.7	1.3%
All other locations in London	2.4	1.3	0.3	0.1	0.0	0.5	0.6	1.2	29.0	16.9	0.3	52.7	3.5%
<b>Sub-total, London</b>	<b>6.0</b>	<b>2.1</b>	<b>4.4</b>	<b>5.9</b>	<b>0.6</b>	<b>3.4</b>	<b>1.9</b>	<b>2.6</b>	<b>39.4</b>	<b>38.9</b>	<b>2.5</b>	<b>107.7</b>	<b>7.1%</b>
<b>Other locations outside survey area</b>													
Lakeside (Shopping Centre & Retail Parks)	7.8	2.3	2.8	4.2	1.1	4.0	3.4	1.3	7.4	4.2	2.9	41.4	2.7%
Welwyn Garden City	0.7	0.0	3.2	1.9	0.6	1.0	0.4	8.1	46.3	1.5	0.1	63.8	4.2%
Chelmsford	0.2	0.3	0.0	0.5	0.5	0.9	19.3	0.0	0.3	5.0	12.1	39.1	2.6%
Cambridge	0.9	0.0	0.1	6.0	1.0	5.6	10.6	3.3	0.0	2.3	0.3	30.0	2.0%
Stevenage	0.2	0.0	0.0	0.4	0.0	0.6	0.0	18.8	4.7	0.0	0.1	24.9	1.6%
All other locations outside survey area	0.8	0.8	1.6	2.7	1.1	4.5	7.4	3.1	9.8	14.4	4.1	50.2	3.3%
<b>Sub-total, other locations</b>	<b>10.6</b>	<b>3.4</b>	<b>7.7</b>	<b>15.7</b>	<b>4.3</b>	<b>16.6</b>	<b>41.1</b>	<b>34.5</b>	<b>68.4</b>	<b>27.4</b>	<b>19.8</b>	<b>249.4</b>	<b>16.4%</b>
<b>Sub-total, comparison goods floorspace outside survey area (C)</b>	<b>16.6</b>	<b>5.5</b>	<b>12.1</b>	<b>21.6</b>	<b>4.9</b>	<b>20.0</b>	<b>43.0</b>	<b>37.1</b>	<b>107.8</b>	<b>66.3</b>	<b>22.3</b>	<b>357.2</b>	<b>23.5%</b>
<b>OVERALL TOTAL (A+B+C)</b>	<b>129.4</b>	<b>64.0</b>	<b>80.0</b>	<b>119.9</b>	<b>28.1</b>	<b>139.7</b>	<b>133.1</b>	<b>115.8</b>	<b>443.7</b>	<b>218.0</b>	<b>49.4</b>	<b>1,521.1</b>	<b>100.0%</b>

Source: Table 3, Table 4

denotes zones wholly/partly within Harlow District

Harlow Retail Study 2016  
Comparison capacity modelling

Table 5c: Comparison goods allocation 2026 - spend (£m) (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Total (£m)	Total (%)
<b>Total available comparison goods spend - 2026</b>	<b>160.6</b>	<b>87.8</b>	<b>98.1</b>	<b>145.2</b>	<b>40.9</b>	<b>169.9</b>	<b>165.7</b>	<b>140.8</b>	<b>536.3</b>	<b>264.8</b>	<b>60.1</b>	<b>1,870.3</b>	<b>100.0</b>
<b>Comparison goods floorspace in Harlow</b>													
<b>Harlow town centre</b>													
Harlow town centre (zone 2)	72.3	40.8	36.5	20.8	13.1	29.1	21.2	30.3	104.0	45.7	7.6	421.3	22.5%
Asda, Water Gardens, Harlow (zone 2)	4.4	0.6	1.1	0.3	0.6	0.6	0.0	0.0	0.0	2.0	0.7	10.2	0.5%
<b>Sub-total, Harlow town centre</b>	<b>76.7</b>	<b>41.4</b>	<b>37.6</b>	<b>21.1</b>	<b>13.6</b>	<b>29.7</b>	<b>21.2</b>	<b>30.3</b>	<b>104.0</b>	<b>47.7</b>	<b>8.2</b>	<b>431.5</b>	<b>23.1%</b>
<b>Neighbourhood centres</b>													
Church Langley (zone 1) (including Tesco store)	7.7	1.1	0.1	0.3	1.5	1.6	0.2	0.2	0.0	2.7	0.7	16.3	0.9%
Old Harlow (zone 1)	0.0	0.1	0.1	0.0	1.6	0.0	0.0	0.0	0.0	10.7	0.0	12.5	0.7%
Other neighbourhood centres (zones 1 and 2)	1.5	1.8	0.6	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.2	0.2%
<b>Sub-total, Harlow neighbourhood centres</b>	<b>9.2</b>	<b>3.0</b>	<b>0.9</b>	<b>0.6</b>	<b>3.1</b>	<b>1.6</b>	<b>0.2</b>	<b>0.2</b>	<b>0.0</b>	<b>13.4</b>	<b>0.7</b>	<b>33.0</b>	<b>1.8%</b>
<b>Edinburgh Way retail warehousing (out-of-centre)</b>													
Princes Gate Retail Park, Edinburgh Way, Harlow (zone 2)	19.3	12.7	14.4	12.7	4.5	16.7	5.4	3.1	15.4	20.4	5.6	130.1	7.0%
Harlow Retail Park, Edinburgh Way, Harlow (zone 2)	14.5	11.4	6.5	11.7	2.8	4.7	2.6	9.0	50.7	11.1	4.6	129.7	6.9%
Other retail warehousing, Edinburgh Way, Harlow (zone 2)	11.1	6.2	4.5	6.0	4.3	3.5	1.1	1.7	8.1	9.4	2.0	57.9	3.1%
<b>Sub-total, Edinburgh Way retail warehousing</b>	<b>44.9</b>	<b>30.3</b>	<b>25.4</b>	<b>30.4</b>	<b>11.6</b>	<b>24.9</b>	<b>9.1</b>	<b>13.8</b>	<b>74.2</b>	<b>40.9</b>	<b>12.2</b>	<b>317.7</b>	<b>17.0%</b>
<b>Other out-of-centre retail floorspace in Harlow</b>													
Sainsbury's, Fifth Allende Avenue, Harlow (zone 2)	2.8	2.6	0.5	0.4	0.5	0.0	0.0	0.5	0.0	0.0	0.4	7.6	0.4%
<b>Sub-total, comparison goods floorspace in Harlow (A)</b>	<b>133.5</b>	<b>77.4</b>	<b>64.4</b>	<b>52.5</b>	<b>28.9</b>	<b>56.3</b>	<b>30.5</b>	<b>44.9</b>	<b>178.1</b>	<b>101.9</b>	<b>21.5</b>	<b>789.9</b>	<b>42.2%</b>
<b>Comparison goods floorspace outside Harlow (within survey area)</b>													
<b>Bishop's Stortford</b>													
Bishop's Stortford town centre (zone 6)	2.3	1.7	1.2	49.6	2.4	73.1	57.8	12.8	0.0	0.6	0.7	202.3	10.8%
Bishop's Stortford foodstores and retail warehousing (zone 6)	0.3	0.0	0.0	9.1	0.1	12.9	12.2	2.2	0.0	0.0	0.5	37.3	2.0%
<b>Sub-total, Bishop's Stortford</b>	<b>2.6</b>	<b>1.7</b>	<b>1.2</b>	<b>58.6</b>	<b>2.6</b>	<b>85.9</b>	<b>70.1</b>	<b>15.1</b>	<b>0.0</b>	<b>0.6</b>	<b>1.2</b>	<b>239.6</b>	<b>12.8%</b>
<b>Brookfield Centre, Cheshunt</b>													
Brookfield Centre, Cheshunt	2.4	0.7	5.8	1.6	1.5	1.1	0.0	4.1	102.4	10.1	0.2	130.0	6.9%
Tesco Extra, Brookfield Centre, Cheshunt	0.1	0.0	0.3	0.0	0.0	0.0	0.0	1.6	13.0	1.2	0.0	16.3	0.9%
<b>Sub-total, Brookfield Centre, Cheshunt</b>	<b>2.6</b>	<b>0.7</b>	<b>6.1</b>	<b>1.6</b>	<b>1.5</b>	<b>1.1</b>	<b>0.0</b>	<b>5.7</b>	<b>115.4</b>	<b>11.4</b>	<b>0.2</b>	<b>146.3</b>	<b>7.8%</b>
<b>Epping</b>													
Epping town centre	0.2	0.2	0.1	0.0	0.3	0.7	0.0	0.0	0.0	26.6	1.1	29.2	1.6%
Tesco, High Street, Epping	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	14.1	0.0	14.5	0.8%
<b>Sub-total, Epping</b>	<b>0.7</b>	<b>0.2</b>	<b>0.1</b>	<b>0.0</b>	<b>0.3</b>	<b>0.7</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>40.7</b>	<b>1.1</b>	<b>43.7</b>	<b>2.3%</b>
<b>Other locations in survey area</b>													
Hoddeston	0.0	0.1	4.9	0.0	0.0	0.0	0.0	1.5	29.5	2.5	0.0	38.6	2.1%
Ware	0.0	0.0	2.9	0.4	0.1	0.0	0.0	20.0	4.8	0.0	0.0	28.2	1.5%
Hertford	0.2	0.0	0.8	0.2	0.1	0.0	0.0	4.7	45.2	0.0	0.0	51.3	2.7%
Waltham Cross	0.3	0.1	0.8	1.5	0.2	0.9	0.7	0.7	25.7	8.6	0.4	40.0	2.1%
Chipping Ongar	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.3	0.4%	
All other locations in survey area	0.2	0.1	2.0	4.2	0.1	0.7	10.9	3.1	7.2	18.6	0.3	47.4	2.5%
<b>Sub-total, other comparison goods floorspace in survey area (B)</b>	<b>6.5</b>	<b>2.9</b>	<b>18.9</b>	<b>66.6</b>	<b>4.9</b>	<b>89.3</b>	<b>81.7</b>	<b>50.8</b>	<b>227.8</b>	<b>82.3</b>	<b>11.5</b>	<b>643.2</b>	<b>34.4%</b>
<b>Comparison goods floorspace outside Harlow (outside survey area)</b>													
<b>London</b>													
Central London	0.7	0.8	5.1	3.9	0.6	2.2	1.4	1.2	8.7	16.4	2.2	43.2	2.3%
Stratford (including Westfield Stratford City)	3.8	0.4	0.0	3.0	0.3	1.3	0.2	0.5	3.9	10.3	0.4	24.1	1.3%
All other locations in London	3.0	1.7	0.3	0.2	0.0	0.6	0.7	1.5	35.0	20.5	0.4	64.1	3.4%
<b>Sub-total, London</b>	<b>7.5</b>	<b>2.9</b>	<b>5.4</b>	<b>7.1</b>	<b>0.9</b>	<b>4.2</b>	<b>2.4</b>	<b>3.1</b>	<b>47.6</b>	<b>47.2</b>	<b>3.1</b>	<b>131.4</b>	<b>7.0%</b>
<b>Other locations outside survey area</b>													
Lakeside (Shopping Centre & Retail Parks)	9.7	3.2	3.4	5.0	1.5	4.9	4.3	1.6	8.9	5.1	3.6	51.2	2.7%
Welwyn Garden City	0.9	0.0	3.9	2.3	0.9	1.2	0.5	9.8	55.9	1.8	0.1	77.5	4.1%
Chelmsford	0.2	0.4	0.0	0.7	0.7	1.1	24.0	0.0	0.3	6.1	14.8	48.2	2.6%
Cambridge	1.1	0.0	0.1	7.3	1.5	6.8	13.2	4.0	0.0	2.9	0.4	37.0	2.0%
Stevenage	0.2	0.1	0.1	0.5	0.0	0.7	0.0	22.9	5.6	0.0	0.2	30.3	1.6%
All other locations outside survey area	0.9	1.0	1.9	3.3	1.6	5.5	9.2	3.7	11.9	17.5	5.0	61.6	3.3%
<b>Sub-total, other locations</b>	<b>13.1</b>	<b>4.6</b>	<b>9.4</b>	<b>19.1</b>	<b>6.2</b>	<b>20.1</b>	<b>51.2</b>	<b>42.0</b>	<b>82.7</b>	<b>33.3</b>	<b>24.0</b>	<b>305.8</b>	<b>16.3%</b>
<b>Sub-total, comparison goods floorspace outside survey area (C)</b>	<b>20.6</b>	<b>7.5</b>	<b>14.9</b>	<b>26.1</b>	<b>7.1</b>	<b>24.3</b>	<b>53.5</b>	<b>45.1</b>	<b>130.4</b>	<b>80.6</b>	<b>27.1</b>	<b>437.2</b>	<b>23.4%</b>
<b>OVERALL TOTAL (A+B+C)</b>	<b>160.6</b>	<b>87.8</b>	<b>98.1</b>	<b>145.2</b>	<b>40.9</b>	<b>169.9</b>	<b>165.7</b>	<b>140.8</b>	<b>536.3</b>	<b>264.8</b>	<b>60.1</b>	<b>1,870.3</b>	<b>100.0%</b>

Source: Table 3, Table 4

denotes zones wholly/partly within Harlow District

Harlow Retail Study 2016  
Comparison capacity modelling

Table 5d: Comparison goods allocation 2031 - spend (£m) (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Total (£m)	Total (%)
<b>Total available comparison goods spend - 2031</b>	<b>199.9</b>	<b>118.5</b>	<b>120.9</b>	<b>176.6</b>	<b>57.5</b>	<b>206.6</b>	<b>204.4</b>	<b>171.1</b>	<b>650.5</b>	<b>322.8</b>	<b>73.4</b>	<b>2,302.2</b>	<b>100.0</b>
<b>Comparison goods floorspace in Harlow</b>													
<b>Harlow town centre</b>													
Harlow town centre (zone 2)	90.0	55.0	45.0	25.2	18.4	35.4	26.1	36.9	126.1	55.7	9.2	523.1	22.7%
Asda, Water Gardens, Harlow (zone 2)	5.5	0.9	1.3	0.4	0.8	0.7	0.0	0.0	0.0	2.4	0.8	12.8	0.6%
<b>Sub-total, Harlow town centre</b>	<b>95.5</b>	<b>55.9</b>	<b>46.3</b>	<b>25.6</b>	<b>19.2</b>	<b>36.1</b>	<b>26.1</b>	<b>36.9</b>	<b>126.1</b>	<b>58.1</b>	<b>10.1</b>	<b>535.9</b>	<b>23.3%</b>
<b>Neighbourhood centres</b>													
Church Langley (zone 1) (including Tesco store)	9.6	1.5	0.2	0.4	2.2	2.0	0.3	0.3	0.0	3.3	0.9	20.5	0.9%
Old Harlow (zone 1)	0.0	0.1	0.2	0.0	2.2	0.0	0.0	0.0	0.0	13.1	0.0	15.6	0.7%
Other neighbourhood centres (zones 1 and 2)	1.9	2.4	0.7	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.4	0.2%
<b>Sub-total, Harlow neighbourhood centres</b>	<b>11.4</b>	<b>4.0</b>	<b>1.1</b>	<b>0.8</b>	<b>4.4</b>	<b>2.0</b>	<b>0.3</b>	<b>0.3</b>	<b>0.0</b>	<b>16.3</b>	<b>0.9</b>	<b>41.5</b>	<b>1.8%</b>
<b>Edinburgh Way retail warehousing (out-of-centre)</b>													
Princes Gate Retail Park, Edinburgh Way, Harlow (zone 2)	24.0	17.1	17.7	15.5	6.3	20.4	6.6	3.7	18.6	24.8	6.8	161.6	7.0%
Harlow Retail Park, Edinburgh Way, Harlow (zone 2)	18.1	15.4	8.0	14.2	4.0	5.7	3.2	11.0	61.5	13.5	5.7	160.2	7.0%
Other retail warehousing, Edinburgh Way, Harlow (zone 2)	13.8	8.4	5.6	7.3	6.0	4.3	1.4	2.1	9.8	11.5	2.4	72.5	3.2%
<b>Sub-total, Edinburgh Way retail warehousing</b>	<b>55.9</b>	<b>40.9</b>	<b>31.3</b>	<b>37.0</b>	<b>16.3</b>	<b>30.3</b>	<b>11.2</b>	<b>16.8</b>	<b>89.9</b>	<b>49.8</b>	<b>14.9</b>	<b>394.4</b>	<b>17.1%</b>
<b>Other out-of-centre retail floorspace in Harlow</b>													
Sainsbury's, Fifth Allende Avenue, Harlow (zone 2)	3.5	3.6	0.6	0.4	0.7	0.0	0.0	0.6	0.0	0.0	0.5	9.8	0.4%
<b>Sub-total, comparison goods floorspace in Harlow (A)</b>	<b>166.3</b>	<b>104.4</b>	<b>79.3</b>	<b>63.8</b>	<b>40.6</b>	<b>68.4</b>	<b>37.6</b>	<b>54.5</b>	<b>216.1</b>	<b>124.3</b>	<b>26.3</b>	<b>981.5</b>	<b>42.6%</b>
<b>Comparison goods floorspace outside Harlow (within survey area)</b>													
<b>Bishop's Stortford</b>													
Bishop's Stortford town centre (zone 6)	2.9	2.4	1.5	60.3	3.4	88.9	71.4	15.6	0.0	0.7	0.9	247.8	10.8%
Bishop's Stortford foodstores and retail warehousing (zone 6)	0.4	0.0	0.0	11.0	0.2	15.6	15.1	2.7	0.0	0.0	0.6	45.6	2.0%
<b>Sub-total, Bishop's Stortford</b>	<b>3.2</b>	<b>2.4</b>	<b>1.5</b>	<b>71.3</b>	<b>3.6</b>	<b>104.5</b>	<b>86.5</b>	<b>18.3</b>	<b>0.0</b>	<b>0.7</b>	<b>1.5</b>	<b>293.4</b>	<b>12.7%</b>
<b>Brookfield Centre, Cheshunt</b>													
Brookfield Centre, Cheshunt	3.0	0.9	7.2	1.9	2.1	1.4	0.0	5.0	124.2	12.3	0.2	158.3	6.9%
Tesco Extra, Brookfield Centre, Cheshunt	0.2	0.0	0.4	0.0	0.0	0.0	0.0	1.9	15.8	1.5	0.0	19.8	0.9%
<b>Sub-total, Brookfield Centre, Cheshunt</b>	<b>3.2</b>	<b>0.9</b>	<b>7.5</b>	<b>1.9</b>	<b>2.1</b>	<b>1.4</b>	<b>0.0</b>	<b>6.9</b>	<b>140.0</b>	<b>13.9</b>	<b>0.2</b>	<b>178.1</b>	<b>7.7%</b>
<b>Epping</b>													
Epping town centre	0.3	0.2	0.2	0.0	0.5	0.8	0.0	0.0	0.0	32.4	1.3	35.7	1.6%
Tesco, High Street, Epping	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	17.2	0.0	17.7	0.8%
<b>Sub-total, Epping</b>	<b>0.8</b>	<b>0.2</b>	<b>0.2</b>	<b>0.0</b>	<b>0.5</b>	<b>0.8</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>49.6</b>	<b>1.3</b>	<b>53.4</b>	<b>2.3%</b>
<b>Other locations in survey area</b>													
Hoddesdon	0.0	0.2	6.0	0.0	0.0	0.0	0.0	1.8	35.8	3.1	0.0	46.9	2.0%
Ware	0.0	0.0	3.6	0.5	0.2	0.0	0.0	24.3	5.8	0.0	0.0	34.3	1.5%
Hertford	0.2	0.0	1.0	0.3	0.1	0.0	0.0	5.8	54.8	0.0	0.0	62.2	2.7%
Waltham Cross	0.4	0.1	1.0	1.8	0.3	1.1	0.9	0.9	31.1	10.5	0.5	48.6	2.1%
Chipping Ongar	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.1	0.0	10.1	0.4%
All other locations in survey area	0.2	0.1	2.4	5.2	0.2	0.8	13.4	3.8	8.7	22.7	0.4	57.9	2.5%
<b>Sub-total, other comparison goods floorspace in survey area (B)</b>	<b>8.1</b>	<b>3.9</b>	<b>23.3</b>	<b>81.0</b>	<b>6.9</b>	<b>108.6</b>	<b>100.8</b>	<b>61.7</b>	<b>276.4</b>	<b>100.3</b>	<b>14.0</b>	<b>785.0</b>	<b>34.1%</b>
<b>Comparison goods floorspace outside Harlow (outside survey area)</b>													
<b>London</b>													
Central London	0.9	1.0	6.3	4.8	0.8	2.7	1.7	1.4	10.6	20.0	2.7	52.9	2.3%
Stratford (including Westfield Stratford City)	4.7	0.6	0.0	3.6	0.4	1.6	0.3	0.5	4.7	12.6	0.5	29.5	1.3%
All other locations in London	3.7	2.3	0.4	0.2	0.0	0.8	0.9	1.8	42.5	25.0	0.5	78.2	3.4%
<b>Sub-total, London</b>	<b>9.3</b>	<b>3.9</b>	<b>6.7</b>	<b>8.6</b>	<b>1.2</b>	<b>5.1</b>	<b>2.9</b>	<b>3.8</b>	<b>57.8</b>	<b>57.6</b>	<b>3.8</b>	<b>160.7</b>	<b>7.0%</b>
<b>Other locations outside survey area</b>													
Lakeside (Shopping Centre & Retail Parks)	12.1	4.3	4.2	6.1	2.2	6.0	5.3	1.9	10.8	6.2	4.4	63.4	2.8%
Welwyn Garden City	1.1	0.0	4.8	2.8	1.3	1.4	0.6	11.9	67.8	2.3	0.2	94.3	4.1%
Chelmsford	0.3	0.5	0.0	0.8	1.0	1.4	29.6	0.0	0.4	7.4	18.0	59.3	2.6%
Cambridge	1.3	0.0	0.1	8.8	2.1	8.2	16.2	4.9	0.0	3.5	0.5	45.6	2.0%
Stevenage	0.3	0.1	0.1	0.6	0.0	0.8	0.0	27.8	6.8	0.0	0.2	36.8	1.6%
All other locations outside survey area	1.2	1.4	2.4	4.0	2.2	6.7	11.4	4.6	14.4	21.3	6.1	75.6	3.3%
<b>Sub-total, other locations</b>	<b>16.3</b>	<b>6.3</b>	<b>11.6</b>	<b>23.2</b>	<b>8.7</b>	<b>24.5</b>	<b>63.1</b>	<b>51.0</b>	<b>100.3</b>	<b>40.6</b>	<b>29.3</b>	<b>375.0</b>	<b>16.3%</b>
<b>Sub-total, comparison goods floorspace outside survey area (C)</b>	<b>25.6</b>	<b>10.2</b>	<b>18.3</b>	<b>31.8</b>	<b>9.9</b>	<b>29.6</b>	<b>66.0</b>	<b>54.8</b>	<b>158.1</b>	<b>98.2</b>	<b>33.1</b>	<b>535.6</b>	<b>23.3%</b>
<b>OVERALL TOTAL (A+B+C)</b>	<b>199.9</b>	<b>118.5</b>	<b>120.9</b>	<b>176.6</b>	<b>57.5</b>	<b>206.6</b>	<b>204.4</b>	<b>171.1</b>	<b>650.5</b>	<b>322.8</b>	<b>73.4</b>	<b>2,302.2</b>	<b>100.0%</b>

Source: Table 3, Table 4

denotes zones wholly/partly within Harlow District



Harlow Retail Study 2016  
Comparison capacity modelling

Table 5e: Comparison goods allocation 2033 - spend (£m) (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Total (£m)	Total (%)
<b>Total available comparison goods spend - 2033</b>	<b>218.0</b>	<b>132.8</b>	<b>131.2</b>	<b>190.8</b>	<b>65.3</b>	<b>223.3</b>	<b>222.0</b>	<b>184.8</b>	<b>702.3</b>	<b>349.1</b>	<b>79.5</b>	<b>2,499.2</b>	<b>100.0</b>
<b>Comparison goods floorspace in Harlow</b>													
<b>Harlow town centre</b>													
Harlow town centre (zone 2)	98.1	61.7	48.8	27.3	20.9	38.3	28.3	39.8	136.2	60.2	10.0	569.7	22.8%
Asda, Water Gardens, Harlow (zone 2)	6.0	1.0	1.5	0.4	0.9	0.8	0.0	0.0	0.0	2.6	0.9	14.0	0.6%
<b>Sub-total, Harlow town centre</b>	<b>104.1</b>	<b>62.7</b>	<b>50.3</b>	<b>27.7</b>	<b>21.8</b>	<b>39.0</b>	<b>28.3</b>	<b>39.8</b>	<b>136.2</b>	<b>62.9</b>	<b>10.9</b>	<b>583.6</b>	<b>23.4%</b>
<b>Neighbourhood centres</b>													
Church Langley (zone 1) (including Tesco store)	10.4	1.6	0.2	0.4	2.5	2.1	0.3	0.3	0.0	3.5	0.9	22.4	0.9%
Old Harlow (zone 1)	0.0	0.2	0.2	0.0	2.5	0.0	0.0	0.0	0.0	14.1	0.0	17.0	0.7%
Other neighbourhood centres (zones 1 and 2)	2.0	2.7	0.8	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.0	0.2%
<b>Sub-total, Harlow neighbourhood centres</b>	<b>12.5</b>	<b>4.5</b>	<b>1.2</b>	<b>0.8</b>	<b>5.0</b>	<b>2.1</b>	<b>0.3</b>	<b>0.3</b>	<b>0.0</b>	<b>17.7</b>	<b>0.9</b>	<b>45.4</b>	<b>1.8%</b>
<b>Edinburgh Way retail warehousing (out-of-centre)</b>													
Princes Gate Retail Park, Edinburgh Way, Harlow (zone 2)	26.1	19.1	19.3	16.7	7.2	22.0	7.2	4.0	20.1	26.9	7.4	176.1	7.0%
Harlow Retail Park, Edinburgh Way, Harlow (zone 2)	19.7	17.3	8.7	15.3	4.5	6.1	3.5	11.9	66.4	14.6	6.1	174.2	7.0%
Other retail warehousing, Edinburgh Way, Harlow (zone 2)	15.0	9.4	6.0	7.9	6.8	4.6	1.5	2.2	10.6	12.4	2.6	79.2	3.2%
<b>Sub-total, Edinburgh Way retail warehousing</b>	<b>60.9</b>	<b>45.9</b>	<b>34.0</b>	<b>39.9</b>	<b>18.5</b>	<b>32.8</b>	<b>12.2</b>	<b>18.1</b>	<b>97.1</b>	<b>53.9</b>	<b>16.2</b>	<b>429.4</b>	<b>17.2%</b>
<b>Other out-of-centre retail floorspace in Harlow</b>													
Sainsbury's, Fifth Allende Avenue, Harlow (zone 2)	3.8	4.0	0.6	0.5	0.8	0.0	0.0	0.7	0.0	0.0	0.5	10.8	0.4%
<b>Sub-total, comparison goods floorspace in Harlow (A)</b>	<b>181.2</b>	<b>117.0</b>	<b>86.1</b>	<b>68.9</b>	<b>46.1</b>	<b>74.0</b>	<b>40.8</b>	<b>58.9</b>	<b>233.3</b>	<b>134.4</b>	<b>28.5</b>	<b>1069.3</b>	<b>42.8%</b>
<b>Comparison goods floorspace outside Harlow (within survey area)</b>													
<b>Bishop's Stortford</b>													
Bishop's Stortford town centre (zone 6)	3.1	2.6	1.6	65.1	3.9	96.0	77.5	16.9	0.0	0.8	0.9	268.5	10.7%
Bishop's Stortford foodstores and retail warehousing (zone 6)	0.4	0.0	0.0	11.9	0.2	16.9	16.4	2.9	0.0	0.0	0.7	49.4	2.0%
<b>Sub-total, Bishop's Stortford</b>	<b>3.5</b>	<b>2.6</b>	<b>1.6</b>	<b>77.0</b>	<b>4.1</b>	<b>112.9</b>	<b>93.9</b>	<b>19.8</b>	<b>0.0</b>	<b>0.8</b>	<b>1.6</b>	<b>317.9</b>	<b>12.7%</b>
<b>Brookfield Centre, Cheshunt</b>													
Brookfield Centre, Cheshunt	3.3	1.0	7.8	2.1	2.4	1.5	0.0	5.4	134.1	13.4	0.2	171.2	6.8%
Tesco Extra, Brookfield Centre, Cheshunt	0.2	0.0	0.4	0.0	0.0	0.0	0.0	2.1	17.1	1.6	0.0	21.4	0.9%
<b>Sub-total, Brookfield Centre, Cheshunt</b>	<b>3.5</b>	<b>1.0</b>	<b>8.2</b>	<b>2.1</b>	<b>2.4</b>	<b>1.5</b>	<b>0.0</b>	<b>7.5</b>	<b>151.2</b>	<b>15.0</b>	<b>0.2</b>	<b>192.6</b>	<b>7.7%</b>
<b>Epping</b>													
Epping town centre	0.3	0.2	0.2	0.0	0.5	0.9	0.0	0.0	0.0	35.1	1.4	38.7	1.5%
Tesco, High Street, Epping	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	18.6	0.0	19.2	0.8%
<b>Sub-total, Epping</b>	<b>0.9</b>	<b>0.2</b>	<b>0.2</b>	<b>0.0</b>	<b>0.5</b>	<b>0.9</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>53.6</b>	<b>1.4</b>	<b>57.8</b>	<b>2.3%</b>
<b>Other locations in survey area</b>													
Hoddesdon	0.0	0.2	6.5	0.0	0.0	0.0	0.0	1.9	38.7	3.3	0.0	50.7	2.0%
Ware	0.0	0.0	3.9	0.5	0.2	0.0	0.0	26.2	6.2	0.0	0.0	37.1	1.5%
Hertford	0.3	0.0	1.1	0.3	0.1	0.0	0.0	6.2	59.2	0.0	0.0	67.2	2.7%
Waltham Cross	0.4	0.1	1.1	2.0	0.3	1.2	1.0	1.0	33.6	11.3	0.6	52.5	2.1%
Chipping Ongar	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.9	0.0	10.9	0.4%
All other locations in survey area	0.2	0.1	2.6	5.6	0.2	0.9	14.6	4.1	9.4	24.5	0.4	62.7	2.5%
<b>Sub-total, other comparison goods floorspace in survey area (B)</b>	<b>8.8</b>	<b>4.4</b>	<b>25.3</b>	<b>87.5</b>	<b>7.9</b>	<b>117.4</b>	<b>109.5</b>	<b>66.7</b>	<b>298.4</b>	<b>108.5</b>	<b>15.2</b>	<b>849.5</b>	<b>34.0%</b>
<b>Comparison goods floorspace outside Harlow (outside survey area)</b>													
<b>London</b>													
Central London	0.9	1.1	6.8	5.2	0.9	2.9	1.9	1.5	11.4	21.6	2.9	57.4	2.3%
Stratford (including Westfield Stratford City)	5.1	0.7	0.0	3.9	0.4	1.7	0.3	0.6	5.1	13.6	0.6	32.0	1.3%
All other locations in London	4.1	2.6	0.4	0.2	0.1	0.8	1.0	2.0	45.9	27.0	0.6	84.7	3.4%
<b>Sub-total, London</b>	<b>10.1</b>	<b>4.4</b>	<b>7.3</b>	<b>9.3</b>	<b>1.4</b>	<b>5.5</b>	<b>3.2</b>	<b>4.1</b>	<b>62.4</b>	<b>62.3</b>	<b>4.1</b>	<b>174.0</b>	<b>7.0%</b>
<b>Other locations outside survey area</b>													
Lakeside (Shopping Centre & Retail Parks)	13.2	4.8	4.6	6.6	2.5	6.5	5.7	2.1	11.7	6.7	4.7	69.0	2.8%
Welwyn Garden City	1.2	0.0	5.2	3.1	1.4	1.5	0.7	12.9	73.2	2.4	0.2	101.9	4.1%
Chelmsford	0.3	0.5	0.0	0.9	1.1	1.5	32.2	0.0	0.4	8.0	19.5	64.4	2.6%
Cambridge	1.4	0.0	0.1	9.5	2.3	8.9	17.6	5.2	0.0	3.8	0.5	49.5	2.0%
Stevenage	0.3	0.1	0.1	0.6	0.1	0.9	0.0	30.0	7.4	0.0	0.2	39.7	1.6%
All other locations outside survey area	1.3	1.6	2.6	4.3	2.5	7.2	12.3	4.9	15.6	23.0	6.6	81.9	3.3%
<b>Sub-total, other locations</b>	<b>17.8</b>	<b>7.0</b>	<b>12.6</b>	<b>25.0</b>	<b>9.9</b>	<b>26.5</b>	<b>68.6</b>	<b>55.1</b>	<b>108.3</b>	<b>43.9</b>	<b>31.8</b>	<b>406.5</b>	<b>16.3%</b>
<b>Sub-total, comparison goods floorspace outside survey area (C)</b>	<b>27.9</b>	<b>11.4</b>	<b>19.9</b>	<b>34.4</b>	<b>11.3</b>	<b>31.9</b>	<b>71.7</b>	<b>59.2</b>	<b>170.7</b>	<b>106.2</b>	<b>35.8</b>	<b>580.5</b>	<b>23.2%</b>
<b>OVERALL TOTAL (A+B+C)</b>	<b>218.0</b>	<b>132.8</b>	<b>131.2</b>	<b>190.8</b>	<b>65.3</b>	<b>223.3</b>	<b>222.0</b>	<b>184.8</b>	<b>702.3</b>	<b>349.1</b>	<b>79.5</b>	<b>2,499.2</b>	<b>100.0%</b>

Source: Table 3, Table 4

denotes zones wholly/partly within Harlow District

Harlow Retail Study 2016  
 Comparison capacity modelling

Table 6: Schedule of comparison goods floorspace

In-centre floorspace	Comparison goods floorspace (sq.m net)
Harlow town centre	36,939
<b>Total in-centre floorspace</b>	<b>36,939</b>
Edge/Out-of-centre floorspace	Comparison goods floorspace (sq.m net)
Edinburgh Way retail parks (Queensgate, Princes Gate, St James Centre, others)	48,712
Non-food floorspace in main foodstores	2,967
<b>Total out-of-centre floorspace</b>	<b>51,679</b>
<b>Overall total</b>	<b>88,618</b>

Source: Experian Goad Category Reports and Harlow Retail Study 2010

Harlow Retail Study 2016  
Comparison capacity modelling

Table 7: Commitments for new comparison goods floorspace

Proposed development	Net Comparison Floorspace (sq.m)	Company Average Sales (£/sq.m net)	Average turnover 2021 (£m)	Average turnover 2026 (£m)	Average turnover 2031 (£m)	Average turnover 2033 (£m)
No commitments	-	-	0.0	0.0	0.0	0.0
<b>Total</b>	-	-	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>

Source: Harlow Council planning application monitoring

Harlow Retail Study 2016  
Comparison capacity modelling

Table 8: District-wide floorspace capacity: MEDIUM GROWTH SCENARIO

	2016	2021	2026	2031*	2033*
Total Available Expenditure (£m)	1,327.4	1,521.1	1,870.3	2,302.2	2,499.2
Market Share from Survey Area (%)	42	41	42	42	42
Comparison goods spending in Harlow town centre (£m)	304.2	347.8	431.5	535.9	583.6
Comparison goods spending in neighbourhood centres (£m)	23.1	26.3	33.0	41.5	45.4
Comparison goods spending in retail parks / out-of-centre foodstores (£m)	224.2	256.2	317.7	394.4	429.4
<b>Total comparison goods spending (£m)</b>	<b>551.5</b>	<b>630.4</b>	<b>782.3</b>	<b>971.7</b>	<b>1,058.4</b>
Existing Retail Floorspace (sq.m net)	88,618	88,618	88,618	88,618	88,618
Sales per sq.m net (£)	6,223	6,672	7,152	7,667	7,883
Sales from Existing Floorspace (£m)	551.5	591.2	633.8	679.4	698.6
Sales from Committed Floorspace (£m)	0.0	0.0	0.0	0.0	0.0
Residual Spending to support new floorspace (£000)	0.0	39.1	148.5	292.3	359.9
Sales per sq.m net in new shops (£)	7,500	8,040	8,619	9,239	9,500
<b>Capacity for new floorspace (sq.m net)</b>	<b>0</b>	<b>4,869</b>	<b>17,227</b>	<b>31,639</b>	<b>37,884</b>
<b>Capacity for new floorspace (sq.m net, rounded)</b>	<b>0</b>	<b>4,900</b>	<b>17,200</b>	<b>31,600</b>	<b>37,900</b>

Assumes growth in sales efficiency of 1.65% per annum to 2033.

\*indicative forecasts, should be subject to further review throughout Local Plan period.

Harlow Retail Study 2016  
Comparison capacity modelling

Table 9: Comparison goods market share of key centres/locations, 2010 & 2016

Retail location		Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)	Zone 11 (%)
Harlow town centre	2010	39.2%	48.4%	39.6%	19.7%	38.1%	12.2%	8.0%	25.7%	14.7%	32.0%	13.6%
	2016	47.7%	47.2%	38.3%	14.5%	33.3%	17.5%	12.8%	21.6%	19.4%	18.0%	13.7%
	<b>Change</b>	<b>8.5%</b>	<b>-1.2%</b>	<b>-1.3%</b>	<b>-5.1%</b>	<b>-4.7%</b>	<b>5.3%</b>	<b>4.8%</b>	<b>-4.1%</b>	<b>4.7%</b>	<b>-14.0%</b>	<b>0.1%</b>
Harlow Edinburgh Way	2010	36.4%	36.5%	26.4%	22.3%	37.5%	15.9%	14.8%	17.9%	14.9%	10.7%	26.1%
	2016	27.9%	34.5%	25.9%	20.9%	28.4%	14.7%	5.5%	9.8%	13.8%	15.4%	20.3%
	<b>Change</b>	<b>-8.4%</b>	<b>-1.9%</b>	<b>-0.4%</b>	<b>-1.4%</b>	<b>-9.2%</b>	<b>-1.2%</b>	<b>-9.3%</b>	<b>-8.1%</b>	<b>-1.0%</b>	<b>4.7%</b>	<b>-5.8%</b>
Bishop's Stortford	2010	1.2%	2.2%	2.2%	37.9%	2.9%	52.6%	32.8%	5.1%	0.3%	0.4%	0.4%
	2016	1.6%	2.0%	1.2%	40.4%	6.3%	50.6%	42.3%	10.7%	0.0%	0.2%	2.0%
	<b>Change</b>	<b>0.4%</b>	<b>-0.2%</b>	<b>-1.0%</b>	<b>2.5%</b>	<b>3.5%</b>	<b>-2.1%</b>	<b>9.5%</b>	<b>5.6%</b>	<b>-0.3%</b>	<b>-0.2%</b>	<b>1.6%</b>
Brookfield, Cheshunt	2010	1.2%	0.6%	8.5%	1.1%	3.7%	0.3%	0.0%	4.5%	18.0%	4.3%	0.0%
	2016	1.6%	0.8%	6.2%	1.1%	3.7%	0.7%	0.0%	4.1%	21.5%	4.3%	0.3%
	<b>Change</b>	<b>0.4%</b>	<b>0.2%</b>	<b>-2.3%</b>	<b>0.0%</b>	<b>0.1%</b>	<b>0.4%</b>	<b>0.0%</b>	<b>-0.4%</b>	<b>3.6%</b>	<b>-0.1%</b>	<b>0.3%</b>
Welwyn Garden City	2010	0.6%	2.6%	7.5%	4.8%	3.2%	2.6%	0.5%	16.8%	10.4%	0.2%	0.2%
	2016	0.6%	0.0%	4.0%	1.6%	2.2%	0.7%	0.3%	7.0%	10.4%	0.7%	0.2%
	<b>Change</b>	<b>-0.1%</b>	<b>-2.6%</b>	<b>-3.6%</b>	<b>-3.2%</b>	<b>-1.0%</b>	<b>-1.9%</b>	<b>-0.2%</b>	<b>-9.8%</b>	<b>0.0%</b>	<b>0.5%</b>	<b>0.0%</b>
Waltham Cross	2010	1.5%	0.0%	0.6%	0.3%	1.4%	0.3%	0.3%	0.2%	12.7%	6.9%	0.6%
	2016	0.2%	0.1%	0.9%	1.0%	0.4%	0.5%	0.4%	0.5%	4.8%	3.2%	0.7%
	<b>Change</b>	<b>-1.3%</b>	<b>0.1%</b>	<b>0.3%</b>	<b>0.8%</b>	<b>-0.9%</b>	<b>0.3%</b>	<b>0.2%</b>	<b>0.3%</b>	<b>-7.9%</b>	<b>-3.6%</b>	<b>0.1%</b>
Lakeside Shopping Centre	2010	10.1%	1.7%	2.1%	1.7%	3.6%	2.9%	0.8%	1.6%	2.2%	7.6%	4.2%
	2016	6.1%	3.6%	3.5%	3.5%	3.8%	2.9%	2.6%	1.1%	1.7%	1.9%	5.9%
	<b>Change</b>	<b>-4.1%</b>	<b>1.9%</b>	<b>1.4%</b>	<b>1.8%</b>	<b>0.2%</b>	<b>0.0%</b>	<b>1.8%</b>	<b>-0.4%</b>	<b>-0.5%</b>	<b>-5.7%</b>	<b>1.7%</b>
Central London	2010	3.5%	1.9%	0.9%	1.9%	3.1%	2.4%	1.6%	1.0%	4.8%	4.2%	3.3%
	2016	0.4%	0.9%	5.2%	2.7%	1.4%	1.3%	0.9%	0.8%	1.6%	6.2%	3.7%
	<b>Change</b>	<b>-3.0%</b>	<b>-1.1%</b>	<b>4.3%</b>	<b>0.8%</b>	<b>-1.7%</b>	<b>-1.1%</b>	<b>-0.8%</b>	<b>-0.2%</b>	<b>-3.2%</b>	<b>2.0%</b>	<b>0.4%</b>
Chelmsford	2010	0.5%	1.5%	0.0%	0.7%	1.9%	0.9%	19.3%	0.0%	0.9%	0.7%	29.1%
	2016	0.1%	0.4%	0.0%	0.5%	1.7%	0.7%	14.5%	0.0%	0.1%	2.3%	24.6%
	<b>Change</b>	<b>-0.4%</b>	<b>-1.1%</b>	<b>0.0%</b>	<b>-0.3%</b>	<b>-0.2%</b>	<b>-0.2%</b>	<b>-4.8%</b>	<b>0.0%</b>	<b>-0.9%</b>	<b>1.6%</b>	<b>-4.5%</b>
Cambridge	2010	1.0%	0.0%	0.0%	4.2%	1.5%	5.2%	9.7%	0.5%	0.8%	0.0%	1.5%
	2016	0.7%	0.0%	0.1%	5.0%	3.6%	4.0%	7.9%	2.8%	0.0%	1.1%	0.6%
	<b>Change</b>	<b>-0.3%</b>	<b>0.0%</b>	<b>0.1%</b>	<b>0.8%</b>	<b>2.0%</b>	<b>-1.2%</b>	<b>-1.7%</b>	<b>2.3%</b>	<b>-0.8%</b>	<b>1.1%</b>	<b>-0.9%</b>
Stevenage	2010	0.1%	0.3%	0.8%	0.0%	0.0%	0.0%	0.0%	8.3%	0.5%	0.0%	0.0%
	2016	0.1%	0.1%	0.1%	0.3%	0.1%	0.4%	0.0%	16.3%	1.1%	0.0%	0.3%
	<b>Change</b>	<b>0.0%</b>	<b>-0.2%</b>	<b>-0.7%</b>	<b>0.3%</b>	<b>0.1%</b>	<b>0.4%</b>	<b>0.0%</b>	<b>8.0%</b>	<b>0.6%</b>	<b>0.0%</b>	<b>0.3%</b>

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

Harlow Retail Study 2016  
Comparison capacity modelling

Table B1: Population forecasts — LOW GROWTH SCENARIO

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Total
<b>2015</b>	43,368	22,594	21,900	26,783	7,234	34,136	30,158	27,148	118,613	56,589	11,166	<b>399,689</b>
<b>2016</b>	43,693	22,782	22,090	27,023	7,277	34,518	30,631	27,469	119,649	57,090	11,264	<b>403,486</b>
<b>2021</b>	45,420	23,767	23,161	28,334	7,509	36,511	33,053	29,022	125,021	59,788	11,820	<b>423,406</b>
<b>2026</b>	47,951	26,986	23,928	29,596	9,042	38,311	35,490	30,449	130,378	62,671	12,403	<b>447,205</b>
<b>2031</b>	50,482	30,205	24,694	30,824	10,576	39,900	37,491	31,680	135,415	65,412	12,973	<b>469,652</b>
<b>2033</b>	51,494	31,493	25,001	31,315	11,189	40,536	38,291	32,172	137,430	66,508	13,201	<b>478,631</b>
<b>Change 2016-33</b>	<b>7,801</b>	<b>8,711</b>	<b>2,911</b>	<b>4,292</b>	<b>3,912</b>	<b>6,018</b>	<b>7,660</b>	<b>4,703</b>	<b>17,781</b>	<b>9,418</b>	<b>1,937</b>	<b>75,145</b>

Source: Experian Micromarketer - forecasts for all zones 2015 to 2021 inclusive, and zones 4 and 6-11 inclusive for 2021 to 2033. NLP/Harlow Council for zones 1, 2, 3 and 5 for 2021-33 inclusive.

	denotes zones wholly/partly within Harlow District
red text	denotes adjusted population forecast to take into account housing growth within/surrounding Harlow urban area

Harlow Retail Study 2016  
Comparison capacity modelling

Table B8: District-wide floorspace capacity: LOW GROWTH SCENARIO

	2016	2021	2026	2031*	2033*
Total Available Expenditure (£m)	1,327.4	1,521.1	1,860.4	2,279.2	2,469.9
Market Share from Survey Area (%)	42	41	42	42	42
Comparison goods spending in Harlow town centre (£m)	304.2	347.8	427.3	526.0	571.0
Comparison goods spending in neighbourhood centres (£m)	23.1	26.3	32.6	40.6	44.2
Comparison goods spending in retail parks / out-of-centre foodstores (£m)	224.2	256.2	314.7	387.5	420.7
<b>Total comparison goods spending (£m)</b>	<b>551.5</b>	<b>630.4</b>	<b>774.7</b>	<b>954.1</b>	<b>1,035.9</b>
Existing Retail Floorspace (sq.m net)	88,618	88,618	88,618	88,618	88,618
Sales per sq.m net (£)	6,223	6,672	7,152	7,667	7,883
Sales from Existing Floorspace (£m)	551.5	591.2	633.8	679.4	698.6
Sales from Committed Floorspace (£m)	0.0	0.0	0.0	0.0	0.0
Residual Spending to support new floorspace (£000)	0.0	39.1	140.9	274.7	337.3
Sales per sq.m net in new shops (£)	7,500	8,040	8,619	9,239	9,500
<b>Capacity for new floorspace (sq.m net)</b>	<b>0</b>	<b>4,869</b>	<b>16,349</b>	<b>29,727</b>	<b>35,510</b>
<b>Capacity for new floorspace (sq.m net, rounded)</b>	<b>0</b>	<b>4,900</b>	<b>16,300</b>	<b>29,700</b>	<b>35,500</b>

Assumes growth in sales efficiency of 1.65% per annum to 2033.

\*indicative forecasts, should be subject to further review throughout Local Plan period.

Harlow Retail Study 2016  
Comparison capacity modelling

Table C1: Population forecasts — HIGH GROWTH SCENARIO

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Total
<b>2015</b>	43,368	22,594	21,900	26,783	7,234	34,136	30,158	27,148	118,613	56,589	11,166	<b>399,689</b>
<b>2016</b>	43,693	22,782	22,090	27,023	7,277	34,518	30,631	27,469	119,649	57,090	11,264	<b>403,486</b>
<b>2021</b>	45,420	23,767	23,161	28,334	7,509	36,511	33,053	29,022	125,021	59,788	11,820	<b>423,406</b>
<b>2026</b>	49,216	29,363	24,618	29,596	10,192	38,311	35,490	30,449	130,378	62,671	12,403	<b>452,687</b>
<b>2031</b>	53,012	34,959	26,074	30,824	12,876	39,900	37,491	31,680	135,415	65,412	12,973	<b>480,615</b>
<b>2033</b>	54,530	37,197	26,657	31,315	13,949	40,536	38,291	32,172	137,430	66,508	13,201	<b>491,787</b>
<b>Change 2016-33</b>	<b>10,837</b>	<b>14,415</b>	<b>4,567</b>	<b>4,292</b>	<b>6,672</b>	<b>6,018</b>	<b>7,660</b>	<b>4,703</b>	<b>17,781</b>	<b>9,418</b>	<b>1,937</b>	<b>88,301</b>

Source: Experian Micromarketer - forecasts for all zones 2015 to 2021 inclusive, and zones 4 and 6-11 inclusive for 2021 to 2033. NLP/Harlow Council for zones 1, 2, 3 and 5 for 2021-33 inclusive.

	denotes zones wholly/partly within Harlow District
red text	denotes adjusted population forecast to take into account housing growth within/surrounding Harlow urban area



Harlow Retail Study 2016  
Comparison capacity modelling

Table C8: District-wide floorspace capacity: HIGH GROWTH SCENARIO

	2016	2021	2026	2031*	2033*
Total Available Expenditure (£m)	1,327.4	1,521.1	1,879.8	2,324.4	2,527.6
Market Share from Survey Area (%)	42	41	42	43	43
Comparison goods spending in Harlow town centre (£m)	304.2	347.8	435.5	545.2	595.5
Comparison goods spending in neighbourhood centres (£m)	23.1	26.3	33.5	42.7	46.9
Comparison goods spending in retail parks / out-of-centre foodstores (£m)	224.2	256.2	320.6	401.2	438.1
<b>Total comparison goods spending (£m)</b>	<b>551.5</b>	<b>630.4</b>	<b>789.7</b>	<b>989.0</b>	<b>1,080.5</b>
Existing Retail Floorspace (sq.m net)	88,618	88,618	88,618	88,618	88,618
Sales per sq.m net (£)	6,223	6,672	7,152	7,667	7,883
Sales from Existing Floorspace (£m)	551.5	591.2	633.8	679.4	698.6
Sales from Committed Floorspace (£m)	0.0	0.0	0.0	0.0	0.0
Residual Spending to support new floorspace (£000)	0.0	39.1	155.9	309.6	382.0
Sales per sq.m net in new shops (£)	7,500	8,040	8,619	9,239	9,500
<b>Capacity for new floorspace (sq.m net)</b>	<b>0</b>	<b>4,869</b>	<b>18,087</b>	<b>33,513</b>	<b>40,211</b>
<b>Capacity for new floorspace (sq.m net, rounded)</b>	<b>0</b>	<b>4,900</b>	<b>18,100</b>	<b>33,500</b>	<b>40,200</b>

Assumes growth in sales efficiency of 1.65% per annum to 2033.

\*indicative forecasts, should be subject to further review throughout Local Plan period.

# CONVENIENCE GOODS MODELLING

Harlow Retail Study 2016  
Convenience capacity modelling

Table 1: Population forecasts — MEDIUM GROWTH SCENARIO

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Total
2015	43,368	22,594	21,900	26,783	7,234	34,136	30,158	27,148	118,613	56,589	11,166	399,689
2016	43,693	22,782	22,090	27,023	7,277	34,518	30,631	27,469	119,649	57,090	11,264	403,486
2021	45,420	23,767	23,161	28,334	7,509	36,511	33,053	29,022	125,021	59,788	11,820	423,406
2026	48,641	28,136	24,503	29,596	9,426	38,311	35,490	30,449	130,378	62,671	12,403	450,003
2031	51,862	32,505	25,844	30,824	11,342	39,900	37,491	31,680	135,415	65,412	12,973	475,249
2033	53,150	34,253	26,381	31,315	12,109	40,536	38,291	32,172	137,430	66,508	13,201	485,347
Change 2016-33	9,457	11,471	4,291	4,292	4,832	6,018	7,660	4,703	17,781	9,418	1,937	81,861

Source: Experian Micromarketer - forecasts for all zones 2015 to 2021 inclusive, and zones 4 and 6-11 inclusive for 2021 to 2033. NLP/Harlow Council for zones 1, 2, 3 and 5 for 2021-33 inclusive.

	denotes zones wholly/partly within Harlow District
red text	denotes adjusted population forecast to take into account housing growth within/surrounding Harlow urban area

Survey area postcode sectors

Zone	Postal Sectors
Zone 1	CM17 9, CM18 6, CM18 7, CM19 4
Zone 2	CM20 1, CM20 2, CM20 3
Zone 3	CM19 5, EM11 0, SG12 8
Zone 4	CM21 0, CM21 9, CM23 4, SG10 6
Zone 5	CM17 0
Zone 6	CM22 7, CM23 2, CM23 3, CM23 5
Zone 7	CM22 6, CM32 1, CM24 1, CM24 8, CM6 1
Zone 8	SG11 1, SG11 2, SG12 0, SG12 7
Zone 9	EN10 6, EN10 7, EN11 8, EN11 9, EN7 5, EN7 6, EN8 0, EN8 7, EN8 8, EN8 9, SG12 9, SG13 7, SG13 8, SG14 1
Zone 10	CM16 4, CM16 5, CM16 6, CM16 7, EN9 1, EN9 2, EN9 3, IG10 2
Zone 11	CM5 0, CM5 9

Harlow Retail Study 2016  
Convenience capacity modelling

Table 2: Convenience goods per capita expenditure by survey zone (2014 prices)

	Zone 1 (£)	Zone 2 (£)	Zone 3 (£)	Zone 4 (£)	Zone 5 (£)	Zone 6 (£)	Zone 7 (£)	Zone 8 (£)	Zone 9 (£)	Zone 10 (£)	Zone 11 (£)
2014	2,092	2,022	2,138	2,316	2,313	2,223	2,252	2,319	2,134	2,211	2,435
2016	2,034	1,965	2,079	2,252	2,249	2,161	2,189	2,255	2,075	2,149	2,368
<b>2016 Minus SFT at 3.0%</b>	<b>1,973</b>	<b>1,906</b>	<b>2,017</b>	<b>2,184</b>	<b>2,181</b>	<b>2,096</b>	<b>2,123</b>	<b>2,187</b>	<b>2,013</b>	<b>2,085</b>	<b>2,297</b>
2021	2,012	1,944	2,056	2,227	2,224	2,137	2,165	2,230	2,052	2,126	2,342
<b>2021 Minus SFT at 3.9%</b>	<b>1,933</b>	<b>1,868</b>	<b>1,976</b>	<b>2,140</b>	<b>2,137</b>	<b>2,054</b>	<b>2,081</b>	<b>2,143</b>	<b>1,972</b>	<b>2,043</b>	<b>2,250</b>
2026	2,018	1,950	2,062	2,234	2,231	2,144	2,172	2,237	2,058	2,132	2,349
<b>2026 Minus SFT at 4.6%</b>	<b>1,925</b>	<b>1,860</b>	<b>1,967</b>	<b>2,131</b>	<b>2,128</b>	<b>2,045</b>	<b>2,072</b>	<b>2,134</b>	<b>1,964</b>	<b>2,034</b>	<b>2,241</b>
2031	2,028	1,959	2,073	2,245	2,242	2,155	2,182	2,248	2,069	2,143	2,361
<b>2031 Minus SFT at 5.0%</b>	<b>1,926</b>	<b>1,861</b>	<b>1,969</b>	<b>2,133</b>	<b>2,130</b>	<b>2,047</b>	<b>2,073</b>	<b>2,135</b>	<b>1,965</b>	<b>2,036</b>	<b>2,242</b>
2033	2,032	1,963	2,077	2,249	2,246	2,159	2,187	2,252	2,073	2,147	2,365
<b>2033 Minus SFT at 5.1%</b>	<b>1,928</b>	<b>1,863</b>	<b>1,971</b>	<b>2,135</b>	<b>2,132</b>	<b>2,049</b>	<b>2,075</b>	<b>2,137</b>	<b>1,967</b>	<b>2,038</b>	<b>2,245</b>

Expenditure growth rates: 2014-15: -1.7% / 2015-16: -1.1% / 2016-17: 0.0% / 2017-18: -0.2% / 2018-19: -0.9% / 2019-23: 0.0%pa / 2023-33: +0.1%pa

Source: Experian E-Marketer, October 2014. Growth rates and allowance for SFT are derived from Experian Retail Planner 14, November 2016.

Table 3: Total convenience goods expenditure available to survey area (2014 prices)

	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Total (£m)
<b>2016</b>	86.2	43.4	44.5	59.0	15.9	72.4	65.0	60.1	240.8	119.0	25.9	<b>832.3</b>
<b>2021</b>	87.8	44.4	45.8	60.6	16.0	75.0	68.8	62.2	246.6	122.1	26.6	<b>855.9</b>
<b>2026</b>	93.6	52.3	48.2	63.1	20.1	78.4	73.5	65.0	256.0	127.5	27.8	<b>905.4</b>
<b>2031</b>	99.9	60.5	50.9	65.7	24.2	81.7	77.7	67.6	266.1	133.2	29.1	<b>956.6</b>
<b>2033</b>	102.5	63.8	52.0	66.8	25.8	83.1	79.5	68.8	270.3	135.5	29.6	<b>977.7</b>
<b>Change 2016-33</b>	<b>16.3</b>	<b>20.4</b>	<b>7.4</b>	<b>7.8</b>	<b>9.9</b>	<b>10.7</b>	<b>14.4</b>	<b>8.7</b>	<b>29.5</b>	<b>16.5</b>	<b>3.8</b>	<b>145.4</b>

Source: Tables 1 & 2

Source: NEMS Market Research Telephone Survey, April 2016

Harlow Retail Study 2016  
Convenience capacity modelling

Table 4: Convenience goods allocation 2016 (% market share)

Zone Centre/Store	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)	Zone 11 (%)
<b>Convenience goods floorspace in Harlow</b>											
<b>Harlow town centre</b>											
Asda, Water Gardens, Harlow (zone 2)	16.8%	7.8%	12.4%	0.9%	3.9%	0.4%	1.2%	0.1%	1.2%	2.2%	3.0%
Tesco Metro, Harlow (zone 2)	3.4%	8.2%	1.7%	0.0%	3.9%	0.7%	0.0%	0.7%	0.0%	0.0%	0.0%
Other stores, Harlow town centre (zone 2)	5.0%	2.6%	2.3%	0.0%	1.2%	0.4%	0.8%	0.0%	0.2%	0.0%	0.0%
<b>Sub-total, Harlow town centre</b>	<b>25.2%</b>	<b>18.6%</b>	<b>16.4%</b>	<b>0.9%</b>	<b>9.0%</b>	<b>1.5%</b>	<b>1.9%</b>	<b>0.9%</b>	<b>1.4%</b>	<b>2.2%</b>	<b>3.0%</b>
<b>Neighbourhood centres</b>											
Tesco, Church Langley, Harlow (zone 1)	27.1%	9.2%	7.8%	3.0%	12.0%	3.8%	0.3%	0.4%	0.0%	5.6%	6.9%
Lidl, Staple Tye, Southern Way, Harlow (zone 1)	7.0%	1.8%	4.2%	0.5%	0.9%	0.6%	0.0%	0.6%	0.0%	0.6%	3.8%
Co-Op, High Street, Old Harlow (zone 5)	0.2%	0.3%	0.3%	0.0%	16.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops, neighbourhood centres (zones 1, 2 and 5)	4.0%	6.3%	0.3%	0.0%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Sub-total, Harlow neighbourhood centres</b>	<b>38.3%</b>	<b>17.6%</b>	<b>12.6%</b>	<b>3.4%</b>	<b>32.6%</b>	<b>4.4%</b>	<b>0.3%</b>	<b>1.0%</b>	<b>0.0%</b>	<b>6.2%</b>	<b>10.6%</b>
<b>Hatches</b>											
Local shops, hatches (zones 1, 2 and 5)	3.6%	1.2%	0.3%	0.0%	1.3%	0.0%	0.0%	0.0%	0.2%	0.3%	0.0%
<b>Sub-total, Harlow hatches</b>	<b>3.6%</b>	<b>1.2%</b>	<b>0.3%</b>	<b>0.0%</b>	<b>1.3%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.2%</b>	<b>0.3%</b>	<b>0.0%</b>
<b>Edge/Out-of-centre foodstores</b>											
Aldi, First Avenue, Harlow (zone 2) (edge-of-centre)	3.5%	19.2%	1.6%	2.2%	9.5%	1.2%	0.0%	0.4%	0.0%	1.1%	2.3%
Sainsbury's, Fifth Allende Avenue, Harlow (zone 2) (out-of-centre)	13.0%	20.8%	12.1%	3.6%	7.0%	0.5%	0.2%	1.6%	0.0%	1.7%	2.9%
Tesco, East Road, Harlow (zone 2) (out-of-centre)	10.1%	18.3%	11.5%	9.1%	28.7%	3.5%	0.0%	0.5%	0.0%	0.7%	1.8%
<b>Sub-total, Harlow edge/out-of-centre foodstores</b>	<b>26.6%</b>	<b>58.2%</b>	<b>25.2%</b>	<b>14.9%</b>	<b>45.2%</b>	<b>5.3%</b>	<b>0.2%</b>	<b>2.4%</b>	<b>0.0%</b>	<b>3.5%</b>	<b>6.9%</b>
<b>Sub-total, convenience goods floorspace in Harlow (A)</b>	<b>93.9%</b>	<b>95.6%</b>	<b>54.4%</b>	<b>19.2%</b>	<b>88.1%</b>	<b>11.2%</b>	<b>2.4%</b>	<b>4.3%</b>	<b>1.7%</b>	<b>12.2%</b>	<b>20.6%</b>
<b>Convenience goods floorspace outside Harlow (within survey area)</b>											
Sawbridgeworth foodstores (zone 4)	0.0%	0.0%	0.0%	8.3%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bishop's Stortford foodstores (zone 6)	1.1%	1.1%	2.1%	69.5%	6.9%	78.8%	52.4%	13.5%	0.0%	0.0%	4.4%
Dunmow foodstores (zone 7)	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	25.0%	0.0%	0.0%	0.6%	0.0%
Ware foodstores (zone 8)	0.0%	0.0%	10.4%	0.4%	0.0%	0.0%	0.0%	51.5%	5.9%	0.0%	0.0%
Herford foodstores (zone 9 / part outside)	0.0%	0.2%	1.6%	0.2%	0.0%	0.0%	0.3%	7.4%	16.3%	0.0%	0.0%
Cheshunt / Waltham Cross foodstores (zone 9)	0.7%	0.4%	2.1%	0.0%	0.0%	0.0%	0.0%	4.1%	31.5%	1.1%	0.2%
Hoddesdon foodstores (zone 9)	0.4%	0.0%	21.3%	1.2%	0.0%	0.0%	0.1%	8.2%	35.8%	4.1%	0.0%
Epping foodstores (zone 10)	1.3%	0.0%	0.5%	0.0%	1.8%	0.5%	0.0%	0.0%	0.0%	42.7%	4.6%
Waltham Abbey foodstores (zone 10)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.8%	0.0%
Ongar foodstores (zone 11)	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	53.7%
<b>Sub-total, other convenience goods floorspace in survey area (B)</b>	<b>3.7%</b>	<b>1.7%</b>	<b>38.0%</b>	<b>79.6%</b>	<b>9.7%</b>	<b>80.8%</b>	<b>77.8%</b>	<b>84.7%</b>	<b>89.6%</b>	<b>60.5%</b>	<b>62.8%</b>
<b>Convenience goods floorspace outside Harlow (outside survey area)</b>											
Loughton foodstores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	18.2%	0.0%
Chelmsford foodstores	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.8%	0.0%	0.0%	0.0%	7.5%
All other locations outside survey area	0.4%	0.1%	3.2%	1.1%	1.0%	6.6%	12.5%	10.5%	8.5%	8.5%	7.8%
<b>Sub-total, convenience goods floorspace outside survey area (C)</b>	<b>0.4%</b>	<b>0.1%</b>	<b>3.2%</b>	<b>1.1%</b>	<b>1.0%</b>	<b>6.8%</b>	<b>13.7%</b>	<b>10.5%</b>	<b>8.5%</b>	<b>26.7%</b>	<b>15.2%</b>
<b>Local / small shops in survey area (D)</b>	<b>2.1%</b>	<b>2.5%</b>	<b>4.4%</b>	<b>0.0%</b>	<b>1.2%</b>	<b>1.2%</b>	<b>6.1%</b>	<b>0.5%</b>	<b>0.2%</b>	<b>0.7%</b>	<b>1.3%</b>
<b>OVERALL TOTAL (A+B+C+D)</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Source: NEMS Market Research Telephone Survey, April 2016

Harlow Retail Study 2016  
Convenience capacity modelling

Table 5a: Convenience goods allocation 2016 - Spend (£m) (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Total (£m)	Total (%)
<b>Total available convenience goods spend — 2016</b>	<b>86.2</b>	<b>43.4</b>	<b>44.5</b>	<b>59.0</b>	<b>15.9</b>	<b>72.4</b>	<b>65.0</b>	<b>60.1</b>	<b>240.8</b>	<b>119.0</b>	<b>25.9</b>	<b>832.3</b>	<b>100.0</b>
<b>Convenience goods floorspace in Harlow</b>													
<b>Harlow town centre</b>													
Asda, Water Gardens, Harlow (zone 2)	14.5	3.4	5.5	0.5	0.6	0.3	0.7	0.1	2.9	2.7	0.8	32.0	3.8%
Tesco Metro, Harlow (zone 2)	3.0	3.6	0.8	0.0	0.6	0.5	0.0	0.4	0.0	0.0	0.0	8.8	1.1%
Other stores, Harlow town centre (zone 2)	4.3	1.1	1.0	0.0	0.2	0.3	0.5	0.0	0.5	0.0	0.0	8.0	1.0%
<b>Sub-total, Harlow town centre</b>	<b>21.8</b>	<b>8.1</b>	<b>7.3</b>	<b>0.5</b>	<b>1.4</b>	<b>1.1</b>	<b>1.3</b>	<b>0.5</b>	<b>3.5</b>	<b>2.7</b>	<b>0.8</b>	<b>48.8</b>	<b>5.9%</b>
<b>Neighbourhood centres</b>													
Tesco, Church Langley, Harlow (zone 1)	23.4	4.0	3.5	1.8	1.9	2.8	0.2	0.2	0.0	6.7	1.8	46.2	5.5%
Lidl, Staple Tye, Southern Way, Harlow (zone 1)	6.0	0.8	1.9	0.3	0.1	0.4	0.0	0.4	0.0	0.7	1.0	11.5	1.4%
Co-Op, High Street, Old Harlow (zone 5)	0.2	0.1	0.0	0.0	2.6	0.0	0.0	0.0	0.0	0.0	0.0	3.1	0.4%
Local shops, neighbourhood centres (zones 1, 2 and 5)	3.5	2.7	0.1	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	6.8	0.8%
<b>Sub-total, Harlow neighbourhood centres</b>	<b>33.0</b>	<b>7.6</b>	<b>5.6</b>	<b>2.0</b>	<b>5.2</b>	<b>3.2</b>	<b>0.2</b>	<b>0.6</b>	<b>0.0</b>	<b>7.3</b>	<b>2.8</b>	<b>67.6</b>	<b>8.1%</b>
<b>Hatches</b>													
Local shops, hatches (zones 1, 2 and 5)	3.1	0.5	0.1	0.0	0.2	0.0	0.0	0.0	0.6	0.4	0.0	5.0	0.6%
<b>Sub-total, Harlow hatches</b>	<b>3.1</b>	<b>0.5</b>	<b>0.1</b>	<b>0.0</b>	<b>0.2</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.6</b>	<b>0.4</b>	<b>0.0</b>	<b>5.0</b>	<b>0.6%</b>
<b>Edge/Out-of-centre foodstores</b>													
Aldi, First Avenue, Harlow (zone 2) (edge-of-centre)	3.0	8.3	0.7	1.3	1.5	0.9	0.0	0.2	0.0	1.3	0.6	17.8	2.1%
Sainsbury's, Fifth Allende Avenue, Harlow (zone 2) (out-of-centre)	11.2	9.0	5.4	2.1	1.1	0.4	0.1	1.0	0.0	2.0	0.7	33.1	4.0%
Tesco, East Road, Harlow (zone 2) (out-of-centre)	8.7	7.9	5.1	5.4	4.6	2.6	0.0	0.3	0.0	0.8	0.5	35.8	4.3%
<b>Sub-total, Harlow edge/out-of-centre foodstores</b>	<b>23.0</b>	<b>25.3</b>	<b>11.2</b>	<b>8.8</b>	<b>7.2</b>	<b>3.9</b>	<b>0.1</b>	<b>1.5</b>	<b>0.0</b>	<b>4.1</b>	<b>1.8</b>	<b>86.8</b>	<b>10.4%</b>
<b>Sub-total, convenience goods floorspace in Harlow (A)</b>	<b>80.9</b>	<b>41.5</b>	<b>24.3</b>	<b>11.3</b>	<b>14.0</b>	<b>8.1</b>	<b>1.6</b>	<b>2.6</b>	<b>4.0</b>	<b>14.5</b>	<b>5.3</b>	<b>208.2</b>	<b>25.0%</b>
<b>Convenience goods floorspace outside Harlow (within survey area)</b>													
Sawbridgeworth foodstores (zone 4)	0.0	0.0	0.0	4.9	0.2	0.0	0.0	0.0	0.0	0.0	0.0	5.1	0.6%
Bishop's Stortford foodstores (zone 6)	1.0	0.5	0.9	41.0	1.1	57.0	34.1	8.1	0.0	0.0	1.1	144.9	17.4%
Dunmow foodstores (zone 7)	0.0	0.0	0.0	0.0	0.0	1.1	16.2	0.0	0.0	0.7	0.0	18.0	2.2%
Ware foodstores (zone 8)	0.0	0.0	4.6	0.2	0.0	0.0	0.0	30.9	14.3	0.0	0.0	50.0	6.0%
Hertford foodstores (zone 9 / part outside)	0.0	0.1	0.7	0.1	0.0	0.0	0.2	4.5	39.3	0.0	0.0	44.9	5.4%
Cheshunt / Waltham Cross foodstores (zone 9)	0.6	0.2	0.9	0.0	0.0	0.0	0.0	2.5	76.0	1.4	0.0	81.5	9.8%
Hoddesdon foodstores (zone 9)	0.3	0.0	9.5	0.7	0.0	0.0	0.1	4.9	86.1	4.9	0.0	106.6	12.8%
Epping foodstores (zone 10)	1.1	0.0	0.2	0.0	0.3	0.4	0.0	0.0	0.0	50.8	1.2	54.0	6.5%
Waltham Abbey foodstores (zone 10)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	14.0	0.0	14.0	1.7%
Ongar foodstores (zone 11)	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	13.9	14.3	1.7%
<b>Sub-total, other convenience goods floorspace in survey area (B)</b>	<b>3.2</b>	<b>0.7</b>	<b>16.9</b>	<b>47.0</b>	<b>1.5</b>	<b>58.5</b>	<b>50.6</b>	<b>50.9</b>	<b>215.7</b>	<b>72.0</b>	<b>16.3</b>	<b>533.2</b>	<b>64.1%</b>
<b>Convenience goods floorspace outside Harlow (outside survey area)</b>													
Loughton foodstores	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	21.7	0.0	22.0	2.6%
Chelmsford foodstores	0.0	0.0	0.0	0.0	0.0	0.2	0.5	0.0	0.0	0.0	1.9	2.6	0.3%
All other locations outside survey area	0.3	0.1	1.4	0.7	0.2	4.8	8.1	6.3	20.5	10.1	2.0	54.5	6.5%
<b>Sub-total, convenience goods floorspace outside survey area (C)</b>	<b>0.3</b>	<b>0.1</b>	<b>1.4</b>	<b>0.7</b>	<b>0.2</b>	<b>4.9</b>	<b>8.9</b>	<b>6.3</b>	<b>20.5</b>	<b>31.8</b>	<b>3.9</b>	<b>79.1</b>	<b>9.5%</b>
<b>Local / small shops in survey area (D)</b>	<b>1.8</b>	<b>1.1</b>	<b>2.0</b>	<b>0.0</b>	<b>0.2</b>	<b>0.9</b>	<b>3.9</b>	<b>0.3</b>	<b>0.5</b>	<b>0.8</b>	<b>0.3</b>	<b>11.8</b>	<b>1.4%</b>
<b>OVERALL TOTAL (A+B+C+D)</b>	<b>86.2</b>	<b>43.4</b>	<b>44.5</b>	<b>59.0</b>	<b>15.9</b>	<b>72.4</b>	<b>65.0</b>	<b>60.1</b>	<b>240.8</b>	<b>119.0</b>	<b>25.9</b>	<b>832.3</b>	<b>100.0%</b>

Source: Table 3, Table 4

Harlow Retail Study 2016  
Convenience capacity modelling

Table 5b: Convenience goods allocation 2021 - Spend (£m) (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Total (£m)	Total (%)
<b>Total available convenience goods spend — 2021</b>	<b>87.8</b>	<b>44.4</b>	<b>45.8</b>	<b>60.6</b>	<b>16.0</b>	<b>75.0</b>	<b>68.8</b>	<b>62.2</b>	<b>246.6</b>	<b>122.1</b>	<b>26.6</b>	<b>855.9</b>	<b>100.0</b>
<b>Convenience goods floorspace in Harlow</b>													
<b>Harlow town centre</b>													
Asda, Water Gardens, Harlow (zone 2)	14.7	3.5	5.7	0.5	0.6	0.3	0.8	0.1	3.0	2.7	0.8	32.8	3.8%
Tesco Metro, Harlow (zone 2)	3.0	3.6	0.8	0.0	0.6	0.5	0.0	0.5	0.0	0.0	0.0	9.0	1.1%
Other stores, Harlow town centre (zone 2)	4.4	1.2	1.0	0.0	0.2	0.3	0.5	0.0	0.5	0.0	0.0	8.2	1.0%
<b>Sub-total, Harlow town centre</b>	<b>22.2</b>	<b>8.3</b>	<b>7.5</b>	<b>0.5</b>	<b>1.4</b>	<b>1.1</b>	<b>1.3</b>	<b>0.5</b>	<b>3.5</b>	<b>2.7</b>	<b>0.8</b>	<b>50.0</b>	<b>5.8%</b>
<b>Neighbourhood centres</b>													
Tesco, Church Langley, Harlow (zone 1)	23.8	4.1	3.6	1.8	1.9	2.9	0.2	0.3	0.0	6.8	1.8	47.2	5.5%
Lidl, Staple Tye, Southern Way, Harlow (zone 1)	6.1	0.8	1.9	0.3	0.1	0.4	0.0	0.4	0.0	0.7	1.0	11.8	1.4%
Co-Op, High Street, Old Harlow (zone 5)	0.2	0.1	0.1	0.0	2.7	0.0	0.0	0.0	0.0	0.0	0.0	3.1	0.4%
Local shops, neighbourhood centres (zones 1, 2 and 5)	3.5	2.8	0.1	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	7.0	0.8%
<b>Sub-total, Harlow neighbourhood centres</b>	<b>33.6</b>	<b>7.8</b>	<b>5.8</b>	<b>2.1</b>	<b>5.2</b>	<b>3.3</b>	<b>0.2</b>	<b>0.6</b>	<b>0.0</b>	<b>7.5</b>	<b>2.8</b>	<b>69.0</b>	<b>8.1%</b>
<b>Hatches</b>													
Local shops, hatches (zones 1, 2 and 5)	3.2	0.5	0.1	0.0	0.2	0.0	0.0	0.0	0.6	0.4	0.0	5.1	0.6%
<b>Sub-total, Harlow hatches</b>	<b>3.2</b>	<b>0.5</b>	<b>0.1</b>	<b>0.0</b>	<b>0.2</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.6</b>	<b>0.4</b>	<b>0.0</b>	<b>5.1</b>	<b>0.6%</b>
<b>Edge/Out-of-centre foodstores</b>													
Aldi, First Avenue, Harlow (zone 2) (edge-of-centre)	3.1	8.5	0.7	1.4	1.5	0.9	0.0	0.2	0.0	1.3	0.6	18.2	2.1%
Sainsbury's, Fifth Allende Avenue, Harlow (zone 2) (out-of-centre)	11.5	9.2	5.5	2.2	1.1	0.4	0.1	1.0	0.0	2.1	0.8	33.9	4.0%
Tesco, East Road, Harlow (zone 2) (out-of-centre)	8.9	8.1	5.3	5.5	4.6	2.7	0.0	0.3	0.0	0.8	0.5	36.6	4.3%
<b>Sub-total, Harlow edge/out-of-centre foodstores</b>	<b>23.4</b>	<b>25.8</b>	<b>11.5</b>	<b>9.0</b>	<b>7.3</b>	<b>4.0</b>	<b>0.1</b>	<b>1.5</b>	<b>0.0</b>	<b>4.2</b>	<b>1.8</b>	<b>88.7</b>	<b>10.4%</b>
<b>Sub-total, convenience goods floorspace in Harlow (A)</b>	<b>82.4</b>	<b>42.5</b>	<b>24.9</b>	<b>11.7</b>	<b>14.1</b>	<b>8.4</b>	<b>1.7</b>	<b>2.7</b>	<b>4.1</b>	<b>14.8</b>	<b>5.5</b>	<b>212.8</b>	<b>24.9%</b>
<b>Convenience goods floorspace outside Harlow (within survey area)</b>													
Sawbridgeworth foodstores (zone 4)	0.0	0.0	0.0	5.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	5.2	0.6%
Bishop's Stortford foodstores (zone 6)	1.0	0.5	1.0	42.2	1.1	59.1	36.0	8.4	0.0	0.0	1.2	150.4	17.6%
Dunmow foodstores (zone 7)	0.0	0.0	0.0	0.0	0.0	1.1	17.2	0.0	0.0	0.7	0.0	19.0	2.2%
Ware foodstores (zone 8)	0.0	0.0	4.7	0.2	0.0	0.0	0.0	32.0	14.6	0.0	0.0	51.6	6.0%
Hertford foodstores (zone 9 / part outside)	0.0	0.1	0.7	0.1	0.0	0.0	0.2	4.6	40.3	0.0	0.0	46.0	5.4%
Cheshunt / Waltham Cross foodstores (zone 9)	0.6	0.2	1.0	0.0	0.0	0.0	0.0	2.6	77.8	1.4	0.0	83.5	9.8%
Hoddesdon foodstores (zone 9)	0.3	0.0	9.8	0.8	0.0	0.1	5.1	88.2	5.0	0.0	0.0	109.2	12.8%
Epping foodstores (zone 10)	1.1	0.0	0.2	0.0	0.3	0.4	0.0	0.0	0.0	52.2	1.2	55.4	6.5%
Waltham Abbey foodstores (zone 10)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	14.4	0.0	14.4	1.7%
Ongar foodstores (zone 11)	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	14.3	14.7	1.7%
<b>Sub-total, other convenience goods floorspace in survey area (B)</b>	<b>3.2</b>	<b>0.8</b>	<b>17.4</b>	<b>48.3</b>	<b>1.6</b>	<b>60.6</b>	<b>53.5</b>	<b>52.7</b>	<b>220.8</b>	<b>73.9</b>	<b>16.7</b>	<b>549.4</b>	<b>64.2%</b>
<b>Convenience goods floorspace outside Harlow (outside survey area)</b>													
Loughton foodstores	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	22.2	0.0	22.5	2.6%
Chelmsford foodstores	0.0	0.0	0.0	0.0	0.0	0.2	0.5	0.0	0.0	0.0	2.0	2.7	0.3%
All other locations outside survey area	0.3	0.1	1.5	0.7	0.2	4.9	8.6	6.5	21.0	10.4	2.1	56.2	6.6%
<b>Sub-total, convenience goods floorspace outside survey area (C)</b>	<b>0.3</b>	<b>0.1</b>	<b>1.5</b>	<b>0.7</b>	<b>0.2</b>	<b>5.1</b>	<b>9.4</b>	<b>6.5</b>	<b>21.0</b>	<b>32.6</b>	<b>4.1</b>	<b>81.5</b>	<b>9.5%</b>
<b>Local / small shops in survey area (D)</b>	<b>1.8</b>	<b>1.1</b>	<b>2.0</b>	<b>0.0</b>	<b>0.2</b>	<b>0.9</b>	<b>4.2</b>	<b>0.3</b>	<b>0.5</b>	<b>0.8</b>	<b>0.3</b>	<b>12.2</b>	<b>1.4%</b>
<b>OVERALL TOTAL (A+B+C+D)</b>	<b>87.8</b>	<b>44.4</b>	<b>45.8</b>	<b>60.6</b>	<b>16.0</b>	<b>75.0</b>	<b>68.8</b>	<b>62.2</b>	<b>246.6</b>	<b>122.1</b>	<b>26.6</b>	<b>855.9</b>	<b>100.0%</b>

Source: Table 3, Table 4

Harlow Retail Study 2016  
Convenience capacity modelling

Table 5c: Convenience goods allocation 2026 - Spend (£m) (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Total (£m)	Total (%)
<b>Total available convenience goods spend — 2026</b>	<b>93.6</b>	<b>52.3</b>	<b>48.2</b>	<b>63.1</b>	<b>20.1</b>	<b>78.4</b>	<b>73.5</b>	<b>65.0</b>	<b>256.0</b>	<b>127.5</b>	<b>27.8</b>	<b>905.4</b>	<b>100.0</b>
<b>Convenience goods floorspace in Harlow</b>													
<b>Harlow town centre</b>													
Asda, Water Gardens, Harlow (zone 2)	15.7	4.1	6.0	0.6	0.8	0.3	0.8	0.1	3.1	2.8	0.8	35.2	3.9%
Tesco Metro, Harlow (zone 2)	3.2	4.3	0.8	0.0	0.8	0.5	0.0	0.5	0.0	0.0	0.0	10.1	1.1%
Other stores, Harlow town centre (zone 2)	4.7	1.4	1.1	0.0	0.2	0.3	0.6	0.0	0.6	0.0	0.0	8.8	1.0%
<b>Sub-total, Harlow town centre</b>	<b>23.6</b>	<b>9.7</b>	<b>7.9</b>	<b>0.6</b>	<b>1.8</b>	<b>1.1</b>	<b>1.4</b>	<b>0.6</b>	<b>3.7</b>	<b>2.8</b>	<b>0.8</b>	<b>54.2</b>	<b>6.0%</b>
<b>Neighbourhood centres</b>													
Tesco, Church Langley, Harlow (zone 1)	25.4	4.8	3.8	1.9	2.4	3.0	0.2	0.3	0.0	7.1	1.9	50.8	5.6%
Lidl, Staple Tye, Southern Way, Harlow (zone 1)	6.5	0.9	2.0	0.3	0.2	0.5	0.0	0.4	0.0	0.7	1.1	12.6	1.4%
Co-Op, High Street, Old Harlow (zone 5)	0.2	0.1	0.1	0.0	3.3	0.0	0.0	0.0	0.0	0.0	0.0	3.8	0.4%
Local shops, neighbourhood centres (zones 1, 2 and 5)	3.7	3.3	0.1	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	7.8	0.9%
<b>Sub-total, Harlow neighbourhood centres</b>	<b>35.9</b>	<b>9.2</b>	<b>6.1</b>	<b>2.2</b>	<b>6.5</b>	<b>3.5</b>	<b>0.2</b>	<b>0.6</b>	<b>0.0</b>	<b>7.8</b>	<b>3.0</b>	<b>75.0</b>	<b>8.3%</b>
<b>Hatches</b>													
Local shops, hatches (zones 1, 2 and 5)	3.4	0.6	0.1	0.0	0.3	0.0	0.0	0.0	0.6	0.4	0.0	5.5	0.6%
<b>Sub-total, Harlow hatches</b>	<b>3.4</b>	<b>0.6</b>	<b>0.1</b>	<b>0.0</b>	<b>0.3</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.6</b>	<b>0.4</b>	<b>0.0</b>	<b>5.5</b>	<b>0.6%</b>
<b>Edge/Out-of-centre foodstores</b>													
Aldi, First Avenue, Harlow (zone 2) (edge-of-centre)	3.3	10.0	0.8	1.4	1.9	1.0	0.0	0.2	0.0	1.3	0.6	20.6	2.3%
Sainsbury's, Fifth Allende Avenue, Harlow (zone 2) (out-of-centre)	12.2	10.9	5.8	2.3	1.4	0.4	0.1	1.0	0.0	2.2	0.8	37.2	4.1%
Tesco, East Road, Harlow (zone 2) (out-of-centre)	9.5	9.6	5.6	5.7	5.8	2.8	0.0	0.3	0.0	0.9	0.5	40.5	4.5%
<b>Sub-total, Harlow edge/out-of-centre foodstores</b>	<b>24.9</b>	<b>30.5</b>	<b>12.1</b>	<b>9.4</b>	<b>9.1</b>	<b>4.2</b>	<b>0.1</b>	<b>1.6</b>	<b>0.0</b>	<b>4.4</b>	<b>1.9</b>	<b>98.2</b>	<b>10.8%</b>
<b>Sub-total, convenience goods floorspace in Harlow (A)</b>	<b>87.9</b>	<b>50.0</b>	<b>26.2</b>	<b>12.1</b>	<b>17.7</b>	<b>8.8</b>	<b>1.8</b>	<b>2.8</b>	<b>4.3</b>	<b>15.5</b>	<b>5.7</b>	<b>232.9</b>	<b>25.7%</b>
<b>Convenience goods floorspace outside Harlow (within survey area)</b>													
Sawbridgeworth foodstores (zone 4)	0.0	0.0	0.0	5.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0	5.4	0.6%
Bishop's Stortford foodstores (zone 6)	1.0	0.6	1.0	43.8	1.4	61.7	38.5	8.8	0.0	0.0	1.2	158.1	17.5%
Dunmow foodstores (zone 7)	0.0	0.0	0.0	0.0	0.0	1.2	18.4	0.0	0.0	0.7	0.0	20.2	2.2%
Ware foodstores (zone 8)	0.0	0.0	5.0	0.2	0.0	0.0	0.0	33.4	15.2	0.0	0.0	53.8	5.9%
Hertford foodstores (zone 9 / part outside)	0.0	0.1	0.8	0.1	0.0	0.0	0.2	4.8	41.8	0.0	0.0	47.8	5.3%
Cheshunt / Waltham Cross foodstores (zone 9)	0.6	0.2	1.0	0.0	0.0	0.0	0.0	2.7	80.8	1.4	0.1	86.8	9.6%
Hoddesdon foodstores (zone 9)	0.3	0.0	10.3	0.8	0.0	0.1	5.3	91.6	5.3	0.0	0.0	113.6	12.5%
Epping foodstores (zone 10)	1.2	0.0	0.3	0.0	0.4	0.4	0.0	0.0	0.0	54.4	1.3	57.9	6.4%
Waltham Abbey foodstores (zone 10)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	15.0	0.0	15.0	1.7%
Ongar foodstores (zone 11)	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	14.9	15.4	1.7%
<b>Sub-total, other convenience goods floorspace in survey area (B)</b>	<b>3.5</b>	<b>0.9</b>	<b>18.3</b>	<b>50.2</b>	<b>1.9</b>	<b>63.3</b>	<b>57.2</b>	<b>55.0</b>	<b>229.3</b>	<b>77.1</b>	<b>17.5</b>	<b>574.2</b>	<b>63.4%</b>
<b>Convenience goods floorspace outside Harlow (outside survey area)</b>													
Loughton foodstores	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	23.2	0.0	23.5	2.6%
Chelmsford foodstores	0.0	0.0	0.0	0.0	0.0	0.2	0.6	0.0	0.0	0.0	2.1	2.9	0.3%
All other locations outside survey area	0.4	0.1	1.5	0.7	0.2	5.2	9.2	6.8	21.8	10.8	2.2	58.9	6.5%
<b>Sub-total, convenience goods floorspace outside survey area (C)</b>	<b>0.4</b>	<b>0.1</b>	<b>1.5</b>	<b>0.7</b>	<b>0.2</b>	<b>5.4</b>	<b>10.1</b>	<b>6.8</b>	<b>21.8</b>	<b>34.0</b>	<b>4.2</b>	<b>85.2</b>	<b>9.4%</b>
<b>Local / small shops in survey area (D)</b>	<b>1.9</b>	<b>1.3</b>	<b>2.1</b>	<b>0.0</b>	<b>0.2</b>	<b>0.9</b>	<b>4.5</b>	<b>0.3</b>	<b>0.6</b>	<b>0.9</b>	<b>0.4</b>	<b>13.1</b>	<b>1.4%</b>
<b>OVERALL TOTAL (A+B+C+D)</b>	<b>93.6</b>	<b>52.3</b>	<b>48.2</b>	<b>63.1</b>	<b>20.1</b>	<b>78.4</b>	<b>73.5</b>	<b>65.0</b>	<b>256.0</b>	<b>127.5</b>	<b>27.8</b>	<b>905.4</b>	<b>100.0%</b>

Source: Table 3, Table 4



Harlow Retail Study 2016  
Convenience capacity modelling

Table 5d: Convenience goods allocation 2031 - Spend (£m) (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Total (£m)	Total (%)
<b>Total available convenience goods spend — 2031</b>	<b>99.9</b>	<b>60.5</b>	<b>50.9</b>	<b>65.7</b>	<b>24.2</b>	<b>81.7</b>	<b>77.7</b>	<b>67.6</b>	<b>266.1</b>	<b>133.2</b>	<b>29.1</b>	<b>956.6</b>	<b>100.0</b>
<b>Convenience goods floorspace in Harlow</b>													
<b>Harlow town centre</b>													
Asda, Water Gardens, Harlow (zone 2)	16.8	4.7	6.3	0.6	1.0	0.3	0.9	0.1	3.2	3.0	0.9	37.7	3.9%
Tesco Metro, Harlow (zone 2)	3.4	4.9	0.9	0.0	1.0	0.6	0.0	0.5	0.0	0.0	0.0	11.3	1.2%
Other stores, Harlow town centre (zone 2)	5.0	1.6	1.2	0.0	0.3	0.3	0.6	0.0	0.6	0.0	0.0	9.5	1.0%
<b>Sub-total, Harlow town centre</b>	<b>25.2</b>	<b>11.3</b>	<b>8.4</b>	<b>0.6</b>	<b>2.2</b>	<b>1.2</b>	<b>1.5</b>	<b>0.6</b>	<b>3.8</b>	<b>3.0</b>	<b>0.9</b>	<b>58.6</b>	<b>6.1%</b>
<b>Neighbourhood centres</b>													
Tesco, Church Langley, Harlow (zone 1)	27.1	5.6	4.0	2.0	2.9	3.1	0.3	0.3	0.0	7.4	2.0	54.6	5.7%
Lidl, Staple Tye, Southern Way, Harlow (zone 1)	7.0	1.1	2.1	0.3	0.2	0.5	0.0	0.4	0.0	0.8	1.1	13.4	1.4%
Co-Op, High Street, Old Harlow (zone 5)	0.2	0.2	0.1	0.0	4.0	0.0	0.0	0.0	0.0	0.0	0.0	4.5	0.5%
Local shops, neighbourhood centres (zones 1, 2 and 5)	4.0	3.8	0.2	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	8.7	0.9%
<b>Sub-total, Harlow neighbourhood centres</b>	<b>38.3</b>	<b>10.6</b>	<b>6.4</b>	<b>2.3</b>	<b>7.9</b>	<b>3.6</b>	<b>0.3</b>	<b>0.7</b>	<b>0.0</b>	<b>8.2</b>	<b>3.1</b>	<b>81.3</b>	<b>8.5%</b>
<b>Hatches</b>													
Local shops, hatches (zones 1, 2 and 5)	3.6	0.7	0.1	0.0	0.3	0.0	0.0	0.0	0.7	0.4	0.0	5.9	0.6%
<b>Sub-total, Harlow hatches</b>	<b>3.6</b>	<b>0.7</b>	<b>0.1</b>	<b>0.0</b>	<b>0.3</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.7</b>	<b>0.4</b>	<b>0.0</b>	<b>5.9</b>	<b>0.6%</b>
<b>Edge/Out-of-centre foodstores</b>													
Aldi, First Avenue, Harlow (zone 2) (edge-of-centre)	3.5	11.6	0.8	1.5	2.3	1.0	0.0	0.2	0.0	1.4	0.7	23.0	2.4%
Sainsbury's, Fifth Allende Avenue, Harlow (zone 2) (out-of-centre)	13.0	12.6	6.1	2.3	1.7	0.4	0.1	1.1	0.0	2.3	0.8	40.6	4.2%
Tesco, East Road, Harlow (zone 2) (out-of-centre)	10.1	11.1	5.9	6.0	6.9	2.9	0.0	0.3	0.0	0.9	0.5	44.5	4.7%
<b>Sub-total, Harlow edge/out-of-centre foodstores</b>	<b>26.6</b>	<b>35.2</b>	<b>12.8</b>	<b>9.8</b>	<b>10.9</b>	<b>4.3</b>	<b>0.1</b>	<b>1.7</b>	<b>0.0</b>	<b>4.6</b>	<b>2.0</b>	<b>108.1</b>	<b>11.3%</b>
<b>Sub-total, convenience goods floorspace in Harlow (A)</b>	<b>93.8</b>	<b>57.9</b>	<b>27.7</b>	<b>12.6</b>	<b>21.3</b>	<b>9.1</b>	<b>1.9</b>	<b>2.9</b>	<b>4.5</b>	<b>16.2</b>	<b>6.0</b>	<b>253.9</b>	<b>26.5%</b>
<b>Convenience goods floorspace outside Harlow (within survey area)</b>													
Sawbridgeworth foodstores (zone 4)	0.0	0.0	0.0	5.5	0.2	0.0	0.0	0.0	0.0	0.0	0.0	5.7	0.6%
Bishop's Stortford foodstores (zone 6)	1.1	0.7	1.1	45.7	1.7	64.3	40.7	9.1	0.0	0.0	1.3	165.7	17.3%
Dunmow foodstores (zone 7)	0.0	0.0	0.0	0.0	0.0	1.2	19.4	0.0	0.0	0.8	0.0	21.4	2.2%
Ware foodstores (zone 8)	0.0	0.0	5.3	0.3	0.0	0.0	0.0	34.8	15.8	0.0	0.0	56.1	5.9%
Hertford foodstores (zone 9 / part outside)	0.0	0.1	0.8	0.1	0.0	0.0	0.2	5.0	43.5	0.0	0.0	49.8	5.2%
Cheshunt / Waltham Cross foodstores (zone 9)	0.7	0.3	1.1	0.0	0.0	0.0	0.0	2.8	84.0	1.5	0.1	90.3	9.4%
Hoddesdon foodstores (zone 9)	0.4	0.0	10.8	0.8	0.0	0.0	0.1	5.5	95.2	5.5	0.0	118.3	12.4%
Epping foodstores (zone 10)	1.3	0.0	0.3	0.0	0.4	0.4	0.0	0.0	0.0	56.9	1.3	60.6	6.3%
Waltham Abbey foodstores (zone 10)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	15.6	0.0	15.6	1.6%
Ongar foodstores (zone 11)	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	15.6	16.1	1.7%
<b>Sub-total, other convenience goods floorspace in survey area (B)</b>	<b>3.7</b>	<b>1.0</b>	<b>19.3</b>	<b>52.4</b>	<b>2.3</b>	<b>66.0</b>	<b>60.5</b>	<b>57.3</b>	<b>238.4</b>	<b>80.5</b>	<b>18.3</b>	<b>599.6</b>	<b>62.7%</b>
<b>Convenience goods floorspace outside Harlow (outside survey area)</b>													
Loughton foodstores	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	24.2	0.0	24.6	2.6%
Chelmsford foodstores	0.0	0.0	0.0	0.0	0.0	0.2	0.6	0.0	0.0	0.0	2.2	3.0	0.3%
All other locations outside survey area	0.4	0.1	1.6	0.7	0.2	5.4	9.7	7.1	22.7	11.3	2.3	61.5	6.4%
<b>Sub-total, convenience goods floorspace outside survey area (C)</b>	<b>0.4</b>	<b>0.1</b>	<b>1.6</b>	<b>0.7</b>	<b>0.2</b>	<b>5.6</b>	<b>10.6</b>	<b>7.1</b>	<b>22.7</b>	<b>35.6</b>	<b>4.4</b>	<b>89.1</b>	<b>9.3%</b>
<b>Local / small shops in survey area (D)</b>	<b>2.1</b>	<b>1.5</b>	<b>2.2</b>	<b>0.0</b>	<b>0.3</b>	<b>1.0</b>	<b>4.7</b>	<b>0.4</b>	<b>0.6</b>	<b>0.9</b>	<b>0.4</b>	<b>14.0</b>	<b>1.5%</b>
<b>OVERALL TOTAL (A+B+C+D)</b>	<b>99.9</b>	<b>60.5</b>	<b>50.9</b>	<b>65.7</b>	<b>24.2</b>	<b>81.7</b>	<b>77.7</b>	<b>67.6</b>	<b>266.1</b>	<b>133.2</b>	<b>29.1</b>	<b>956.6</b>	<b>100.0%</b>

Source: Table 3, Table 4

Harlow Retail Study 2016  
Convenience capacity modelling

Table 5e: Convenience goods allocation 2033 - Spend (£m) (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Total (£m)	Total (%)
<b>Total available convenience goods spend — 2033</b>	<b>102.5</b>	<b>63.8</b>	<b>52.0</b>	<b>66.8</b>	<b>25.8</b>	<b>83.1</b>	<b>79.5</b>	<b>68.8</b>	<b>270.3</b>	<b>135.5</b>	<b>29.6</b>	<b>977.7</b>	<b>100.0</b>
<b>Convenience goods floorspace in Harlow</b>													
<b>Harlow town centre</b>													
Asda, Water Gardens, Harlow (zone 2)	17.2	5.0	6.5	0.6	1.0	0.3	0.9	0.1	3.3	3.0	0.9	38.8	4.0%
Tesco Metro, Harlow (zone 2)	3.5	5.2	0.9	0.0	1.0	0.6	0.0	0.5	0.0	0.0	0.0	11.7	1.2%
Other stores, Harlow town centre (zone 2)	5.2	1.7	1.2	0.0	0.3	0.3	0.6	0.0	0.6	0.0	0.0	9.8	1.0%
<b>Sub-total, Harlow town centre</b>	<b>25.9</b>	<b>11.9</b>	<b>8.5</b>	<b>0.6</b>	<b>2.3</b>	<b>1.2</b>	<b>1.5</b>	<b>0.6</b>	<b>3.9</b>	<b>3.0</b>	<b>0.9</b>	<b>60.4</b>	<b>6.2%</b>
<b>Neighbourhood centres</b>													
Tesco, Church Langley, Harlow (zone 1)	27.8	5.9	4.1	2.0	3.1	3.2	0.3	0.3	0.0	7.6	2.0	56.2	5.7%
Lidl, Staple Tye, Southern Way, Harlow (zone 1)	7.2	1.1	2.2	0.3	0.2	0.5	0.0	0.4	0.0	0.8	1.1	13.8	1.4%
Co-Op, High Street, Old Harlow (zone 5)	0.2	0.2	0.1	0.0	4.3	0.0	0.0	0.0	0.0	0.0	0.0	4.8	0.5%
Local shops, neighbourhood centres (zones 1, 2 and 5)	4.1	4.0	0.2	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	9.1	0.9%
<b>Sub-total, Harlow neighbourhood centres</b>	<b>39.3</b>	<b>11.2</b>	<b>6.6</b>	<b>2.3</b>	<b>8.4</b>	<b>3.7</b>	<b>0.3</b>	<b>0.7</b>	<b>0.0</b>	<b>8.3</b>	<b>3.2</b>	<b>83.8</b>	<b>8.6%</b>
<b>Hatches</b>													
Local shops, hatches (zones 1, 2 and 5)	3.7	0.8	0.1	0.0	0.3	0.0	0.0	0.0	0.7	0.4	0.0	6.1	0.6%
<b>Sub-total, Harlow hatches</b>	<b>3.7</b>	<b>0.8</b>	<b>0.1</b>	<b>0.0</b>	<b>0.3</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.7</b>	<b>0.4</b>	<b>0.0</b>	<b>6.1</b>	<b>0.6%</b>
<b>Edge/Out-of-centre foodstores</b>													
Aldi, First Avenue, Harlow (zone 2) (edge-of-centre)	3.6	12.2	0.8	1.5	2.5	1.0	0.0	0.2	0.0	1.4	0.7	24.0	2.5%
Sainsbury's, Fifth Allende Avenue, Harlow (zone 2) (out-of-centre)	13.4	13.3	6.3	2.4	1.8	0.5	0.1	1.1	0.0	2.3	0.9	42.0	4.3%
Tesco, East Road, Harlow (zone 2) (out-of-centre)	10.4	11.7	6.0	6.1	7.4	2.9	0.0	0.3	0.0	0.9	0.5	46.2	4.7%
<b>Sub-total, Harlow edge/out-of-centre foodstores</b>	<b>27.3</b>	<b>37.2</b>	<b>13.1</b>	<b>10.0</b>	<b>11.7</b>	<b>4.4</b>	<b>0.1</b>	<b>1.7</b>	<b>0.0</b>	<b>4.7</b>	<b>2.1</b>	<b>112.2</b>	<b>11.5%</b>
<b>Sub-total, convenience goods floorspace in Harlow (A)</b>	<b>96.2</b>	<b>61.0</b>	<b>28.3</b>	<b>12.9</b>	<b>22.8</b>	<b>9.3</b>	<b>1.9</b>	<b>3.0</b>	<b>4.5</b>	<b>16.5</b>	<b>6.1</b>	<b>262.5</b>	<b>26.8%</b>
<b>Convenience goods floorspace outside Harlow (within survey area)</b>													
Sawbridgeworth foodstores (zone 4)	0.0	0.0	0.0	5.6	0.2	0.0	0.0	0.0	0.0	0.0	0.0	5.8	0.6%
Bishop's Stortford foodstores (zone 6)	1.1	0.7	1.1	46.5	1.8	65.4	41.6	9.3	0.0	0.0	1.3	168.9	17.3%
Dunmow foodstores (zone 7)	0.0	0.0	0.0	0.0	0.0	1.2	19.8	0.0	0.0	0.8	0.0	21.8	2.2%
Ware foodstores (zone 8)	0.0	0.0	5.4	0.3	0.0	0.0	0.0	35.4	16.0	0.0	0.0	57.0	5.8%
Hertford foodstores (zone 9 / part outside)	0.0	0.1	0.8	0.1	0.0	0.0	0.2	5.1	44.2	0.0	0.0	50.6	5.2%
Cheshunt / Waltham Cross foodstores (zone 9)	0.7	0.3	1.1	0.0	0.0	0.0	0.0	2.8	85.3	1.5	0.1	91.7	9.4%
Hoddesdon foodstores (zone 9)	0.4	0.0	11.1	0.8	0.0	0.1	5.6	96.7	5.6	0.0	0.0	120.3	12.3%
Epping foodstores (zone 10)	1.3	0.0	0.3	0.0	0.5	0.4	0.0	0.0	0.0	57.9	1.4	61.7	6.3%
Waltham Abbey foodstores (zone 10)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	15.9	0.0	15.9	1.6%
Ongar foodstores (zone 11)	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	15.9	16.4	1.7%
<b>Sub-total, other convenience goods floorspace in survey area (B)</b>	<b>3.8</b>	<b>1.1</b>	<b>19.8</b>	<b>53.2</b>	<b>2.5</b>	<b>67.1</b>	<b>61.8</b>	<b>58.2</b>	<b>242.1</b>	<b>81.9</b>	<b>18.6</b>	<b>610.2</b>	<b>62.4%</b>
<b>Convenience goods floorspace outside Harlow (outside survey area)</b>													
Loughton foodstores	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	24.7	0.0	25.0	2.6%
Chelmsford foodstores	0.0	0.0	0.0	0.0	0.0	0.2	0.6	0.0	0.0	0.0	2.2	3.0	0.3%
All other locations outside survey area	0.4	0.1	1.6	0.8	0.3	5.5	9.9	7.2	23.1	11.5	2.3	62.6	6.4%
<b>Sub-total, convenience goods floorspace outside survey area (C)</b>	<b>0.4</b>	<b>0.1</b>	<b>1.6</b>	<b>0.8</b>	<b>0.3</b>	<b>5.7</b>	<b>10.9</b>	<b>7.2</b>	<b>23.1</b>	<b>36.2</b>	<b>4.5</b>	<b>90.7</b>	<b>9.3%</b>
<b>Local / small shops in survey area (D)</b>	<b>2.1</b>	<b>1.6</b>	<b>2.3</b>	<b>0.0</b>	<b>0.3</b>	<b>1.0</b>	<b>4.8</b>	<b>0.4</b>	<b>0.6</b>	<b>0.9</b>	<b>0.4</b>	<b>14.4</b>	<b>1.5%</b>
<b>OVERALL TOTAL (A+B+C+D)</b>	<b>102.5</b>	<b>63.8</b>	<b>52.0</b>	<b>66.8</b>	<b>25.8</b>	<b>83.1</b>	<b>79.5</b>	<b>68.8</b>	<b>270.3</b>	<b>135.5</b>	<b>29.6</b>	<b>977.7</b>	<b>100.0%</b>

Source: Table 3, Table 4

## Harlow Retail Study 2016

### Convenience capacity modelling

Table 6: Performance assessment of convenience goods floorspace

	Total net floorspace (sq.m)	Net Conv Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sqm net)	Average Turnover 2016 (£m)	Actual Turnover 2016 (£m) (Table 5a)	Difference from Avg Turnover 2016 (£m)
<b>Harlow town centre</b>							
Asda, Water Gardens, Harlow (zone 2)	5,026	56%	2,815	13,350	37.6	32.0	-5.5
Tesco Metro, Harlow (zone 2)	1,970	80%	1,576	11,619	18.3	8.8	-9.5
Other stores, Harlow town centre (zone 2)	4,602	95%	4,372	3,000	13.1	8.0	-5.1
<b>Sub-total, Harlow town centre</b>	<b>11,598</b>	<b>-</b>	<b>8,763</b>	<b>-</b>	<b>69.0</b>	<b>48.8</b>	<b>-20.2</b>
<b>Neighbourhood centres</b>							
Tesco, Church Langley, Harlow (zone 1)	2,842	80%	2,274	11,619	26.4	46.2	19.8
Lidl, Staple Tye, Southern Way, Harlow (zone 1)	912	95%	866	3,524	3.1	11.5	8.5
Co-Op, High Street, Old Harlow (zone 5)	218	95%	207	7,823	1.6	3.1	1.4
Local shops, neighbourhood centres (zones 1, 2 and 5)	-	-	-	-	-	6.8	-
<b>Sub-total, Harlow neighbourhood centres</b>	<b>3,972</b>	<b>-</b>	<b>3,347</b>	<b>-</b>	<b>31.1</b>	<b>67.6</b>	<b>29.6</b>
<b>Hatches</b>							
Local shops, hatches (zones 1, 2 and 5)	-	-	-	-	-	5.0	-
<b>Sub-total, Harlow hatches</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>5.0</b>	<b>-</b>
<b>Edge/Out-of-centre foodstores</b>							
Aldi, First Avenue, Harlow (zone 2) (edge-of-centre)	990	95%	941	9,704	9.1	17.8	8.7
Sainsbury's, Fifth Allende Avenue, Harlow (zone 2) (out-of-centre)	4,602	70%	3,221	12,181	39.2	33.1	-6.1
Tesco, East Road, Harlow (zone 2) (out-of-centre)	3,149	90%	2,834	11,619	32.9	35.8	2.9
<b>Sub-total, Harlow edge/out-of-centre foodstores</b>	<b>8,741</b>	<b>-</b>	<b>6,996</b>	<b>-</b>	<b>81.3</b>	<b>86.8</b>	<b>5.5</b>
<b>Overall total</b>	<b>24,311</b>	<b>-</b>	<b>19,106</b>	<b>9,494</b>	<b>181.4</b>	<b>208.2</b>	<b>15.0</b>

Floorspace source: IGD & Harlow Retail Study 2010.

Company average convenience goods floorspace ratios sourced from Verdict, but adjusted based on own observations where necessary.

Company average sales densities sourced from Mintel UK Retail Rankings

Harlow Retail Study 2016  
Convenience capacity modelling

Table 7: Commitments for new convenience goods floorspace

Proposed development	Net Convenience Goods Floorspace (sq.m)	Company Average Sales (£/sq.m net)	Average turnover 2021 (£m)	Average turnover 2026 (£m)	Average turnover 2031 (£m)	Average turnover 2033 (£m)
No commitments	-	-	0.0	0.0	0.0	0.0
<b>Total</b>	<b>0</b>	<b>-</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>

Source: Harlow Council planning application monitoring

## Harlow Retail Study 2016

### Convenience capacity modelling

**Table 8: District-wide floorspace capacity — MEDIUM GROWTH SCENARIO**

	2016	2021	2026	2031*	2033*
Residents Spending in Harlow District main stores (£m)	196.4	200.8	219.6	239.2	247.3
Existing main stores floorspace within Harlow District (sq.m net)	19,106	19,106	19,106	19,106	19,106
Sales per sq.m net (£)	10,278	9,494	9,637	9,783	9,841
Sales from existing floorspace (£m)	196.4	181.4	184.1	186.9	188.0
Sales from committed floorspace (£m)	0.0	0.0	0.0	0.0	0.0
Residual spending to support new convenience goods floorspace (£m)	0.0	19.4	35.4	52.3	59.2
Sales per sq.m net in new shops (£) <i>Based on large store format</i>	12,000	12,181	12,365	12,551	12,627
<b>Capacity for new floorspace (sq.m net)</b>	<b>0</b>	<b>1,592</b>	<b>2,866</b>	<b>4,170</b>	<b>4,692</b>
<b>Capacity for new floorspace (sq.m net, rounded)</b>	<b>0</b>	<b>1,600</b>	<b>2,900</b>	<b>4,200</b>	<b>4,700</b>

*Assumes growth in sales efficiency of 0.3% per annum to 2033 (Source: Experian Retail Planner 14, November 2016, Figure 3a)*

*\*indicative forecasts, should be subject to further review throughout Local Plan period.*

Harlow Retail Study 2016  
 Convenience capacity modelling

Table B1: Population forecasts — LOW GROWTH SCENARIO

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Total
<b>2015</b>	43,368	22,594	21,900	26,783	7,234	34,136	30,158	27,148	118,613	56,589	11,166	<b>399,689</b>
<b>2016</b>	43,693	22,782	22,090	27,023	7,277	34,518	30,631	27,469	119,649	57,090	11,264	<b>403,486</b>
<b>2021</b>	45,420	23,767	23,161	28,334	7,509	36,511	33,053	29,022	125,021	59,788	11,820	<b>423,406</b>
<b>2026</b>	47,951	26,986	23,928	29,596	9,042	38,311	35,490	30,449	130,378	62,671	12,403	<b>447,205</b>
<b>2031</b>	50,482	30,205	24,694	30,824	10,576	39,900	37,491	31,680	135,415	65,412	12,973	<b>469,652</b>
<b>2033</b>	51,494	31,493	25,001	31,315	11,189	40,536	38,291	32,172	137,430	66,508	13,201	<b>478,631</b>
<b>Change 2016-33</b>	<b>7,801</b>	<b>8,711</b>	<b>2,911</b>	<b>4,292</b>	<b>3,912</b>	<b>6,018</b>	<b>7,660</b>	<b>4,703</b>	<b>17,781</b>	<b>9,418</b>	<b>1,937</b>	<b>75,145</b>

Source: Experian Micromarketer - forecasts for all zones 2015 to 2021 inclusive, and zones 4 and 6-11 inclusive for 2021 to 2033. NLP/Harlow Council for zones 1, 2, 3 and 5 for 2021-33 inclusive.

	denotes zones wholly/partly within Harlow District
red text	denotes adjusted population forecast to take into account housing growth within/surrounding Harlow urban area

## Harlow Retail Study 2016

### Convenience capacity modelling

**Table B8: District-wide floorspace capacity — LOW GROWTH SCENARIO**

	2016	2021	2026	2031*	2033*
Residents Spending in Harlow District main stores (£m)	196.4	200.8	215.2	230.6	236.9
Existing main stores floorspace within Harlow District (sq.m net)	19,106	19,106	19,106	19,106	19,106
Sales per sq.m net (£)	10,278	9,494	9,637	9,783	9,841
Sales from existing floorspace (£m)	196.4	181.4	184.1	186.9	188.0
Sales from committed floorspace (£m)	0.0	0.0	0.0	0.0	0.0
Residual spending to support new convenience goods floorspace (£m)	0.0	19.4	31.1	43.7	48.9
Sales per sq.m net in new shops (£) <i>Based on large store format</i>	12,000	12,181	12,365	12,551	12,627
<b>Capacity for new floorspace (sq.m net)</b>	<b>0</b>	<b>1,592</b>	<b>2,516</b>	<b>3,480</b>	<b>3,869</b>
<b>Capacity for new floorspace (sq.m net, rounded)</b>	<b>0</b>	<b>1,600</b>	<b>2,500</b>	<b>3,500</b>	<b>3,900</b>

*Assumes growth in sales efficiency of 0.3% per annum to 2033 (source: Experian Retail Planner 14, November 2016, Figure 3a)*

*\*indicative forecasts, should be subject to further review throughout Local Plan period.*

Harlow Retail Study 2016  
 Convenience capacity modelling

Table C1: Population forecasts — HIGH GROWTH SCENARIO

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Total
<b>2015</b>	43,368	22,594	21,900	26,783	7,234	34,136	30,158	27,148	118,613	56,589	11,166	<b>399,689</b>
<b>2016</b>	43,693	22,782	22,090	27,023	7,277	34,518	30,631	27,469	119,649	57,090	11,264	<b>403,486</b>
<b>2021</b>	45,420	23,767	23,161	28,334	7,509	36,511	33,053	29,022	125,021	59,788	11,820	<b>423,406</b>
<b>2026</b>	49,216	29,363	24,618	29,596	10,192	38,311	35,490	30,449	130,378	62,671	12,403	<b>452,687</b>
<b>2031</b>	53,012	34,959	26,074	30,824	12,876	39,900	37,491	31,680	135,415	65,412	12,973	<b>480,615</b>
<b>2033</b>	54,530	37,197	26,657	31,315	13,949	40,536	38,291	32,172	137,430	66,508	13,201	<b>491,787</b>
<b>Change 2016-33</b>	<b>10,837</b>	<b>14,415</b>	<b>4,567</b>	<b>4,292</b>	<b>6,672</b>	<b>6,018</b>	<b>7,660</b>	<b>4,703</b>	<b>17,781</b>	<b>9,418</b>	<b>1,937</b>	<b>88,301</b>

Source: Experian Micromarketer - forecasts for all zones 2015 to 2021 inclusive, and zones 4 and 6-11 inclusive for 2021 to 2033. NLP/Harlow Council for zones 1, 2, 3 and 5 for 2021-33 inclusive.

	denotes zones wholly/partly within Harlow District
red text	denotes adjusted population forecast to take into account housing growth within/surrounding Harlow urban area



Harlow Retail Study 2016  
 Convenience capacity modelling

Table C8: District-wide floorspace capacity — HIGH GROWTH SCENARIO

	2016	2021	2026	2031*	2033*
Residents Spending in Harlow District main stores (£m)	196.4	200.8	224.0	248.2	258.0
Existing main stores floorspace within Harlow District (sq.m net)	19,106	19,106	19,106	19,106	19,106
Sales per sq.m net (£)	10,278	9,494	9,637	9,783	9,841
Sales from existing floorspace (£m)	196.4	181.4	184.1	186.9	188.0
Sales from committed floorspace (£m)	0.0	0.0	0.0	0.0	0.0
Residual spending to support new convenience goods floorspace (£m)	0.0	19.4	39.9	61.2	70.0
Sales per sq.m net in new shops (£) Based on large store format	12,000	12,181	12,365	12,551	12,627
<b>Capacity for new floorspace (sq.m net)</b>	<b>0</b>	<b>1,592</b>	<b>3,226</b>	<b>4,880</b>	<b>5,540</b>
<b>Capacity for new floorspace (sq.m net, rounded)</b>	<b>0</b>	<b>1,600</b>	<b>3,200</b>	<b>4,900</b>	<b>5,500</b>

Assumes growth in sales efficiency of 0.3% per annum to 2033 (source: Experian Retail Planner 14, November 2016, Figure 3a)  
 \*indicative forecasts, should be subject to further review throughout Local Plan period.