



## **HARLOW DISTRICT COUNCIL**

**RETAIL STUDY UPDATE  
NOVEMBER 2010**

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# 1. INTRODUCTION

- 1.1 In April 2010, GVA Grimley was instructed by Harlow District Council to update the previous Retail Study and Town Centre Health Check (July 2007) to inform retail planning in the District during the period up to 2031 in accordance with guidance set out in PPS4: 'Planning for Sustainable Economic Growth' (December 2009). This study provides a robust and sound evidence base to inform the Council's Local Development Framework (LDF) and to assist in reaching conclusions on shorter term proposals for the development of town centre uses.
- 1.2 The scope of the study therefore is to provide up to date advice on the need and capacity for new retail development in the District up to 2031, identify qualitative deficiencies in existing provision, and advise the Council on how to best meet any identified need. This includes advice on the appropriate scale of development and the sequential approach to site selection. This is informed by a detailed up to date health check assessment of Harlow town centre, from which we also give consideration to the qualitative need for other town centre uses.
- 1.3 Our approach draws on the recommendations of the Good Practice Guidance on Need, Impact and the Sequential Approach, produced by GVA Grimley in conjunction with the DCLG, to accompany PPS4. We have adopted a transparent approach, where the key steps of our analysis, data inputs and assumptions are clearly set out and justified. In accordance with the Good Practice Guidance, our approach is also underpinned by the use of an up-to-date household telephone survey to establish current shopping patterns, town centre catchments and market share estimates for both comparison and convenience goods retailing. We also take into consideration and test the implications of additional housing growth on capacity over the period to 2021 and beyond.
- 1.4 As highlighted above, this study builds upon the previous retail study undertaken by GVA Grimley which was published in July 2007. The 2007 study involved a detailed assessment of retail and other town centre uses across the District. Given that very little has changed in the five neighbourhood centres and 18 hatches we have not surveyed these centres as part of this update. We have instead focussed our assessment on the role and function of Harlow town centre and opportunities for the future.

## Structure

- 1.5 This report draws together the results of our research, incorporating the findings of the detailed survey-based technical analysis and health check assessment. The report is structured as follows:-
- **Section 2** summarises the national, regional and local planning policies relevant to retail planning in the District;

- In **Section 3**, we consider national trends in the retail sector, and in particular the implications of the recession and more cautious economic outlook specifically in relation to previous estimates of population and expenditure growth;
- **Section 4** reviews the sub-regional context and in particular the influence of competing centres in the wider sub-region, and potential changes in influence in the future;
- **Section 5** presents our qualitative assessment of the role and performance of Harlow town centre in accordance with the key health check indicators outlined in PPS4. We also provide an up-to-date overview of out-of-centre convenience and comparison retailing in the District;
- **Section 6** sets out our baseline capacity projections for additional convenience and comparison goods floorspace in the District, taking account of recent/committed developments and current economic conditions up to 2031;
- **Section 7** presents our scenario testing of different housing growth options for the District and the implications on capacity for new retail floorspace;
- **Section 8** provides a qualitative review of the distribution of commercial leisure facilities, as well as estimates of future leisure expenditure and a broad overview of offices;
- Finally **Section 9** draws the analysis together and sets out the conclusions and recommendations in respect of the key policy considerations, the current health and composition of Harlow town centre and the need and opportunities for future growth.

## 2. POLICY FRAMEWORK

2.1 This section sets out the key points of relevance from policy changes since the previous Harlow Retail Study (2007), focusing specifically on retail planning and policies for the town centre. This latest national, regional and local policy framework provides the context for our study.

### **PPS4: Planning for Sustainable Economic Growth (December 2009)**

2.2 Planning Policy Statement 4 (PPS4) was published in December 2009 and replaces Planning Policy Statement 6: Planning for Town Centres, which informed the 2007 study. The central message of PPS4 is the need for a more proactive approach to securing new investment in centres, and achieving more sustainable patterns of development. The Government's key objective for town centres is to promote their vitality and viability by:

- Focusing new economic growth and development of main town centre uses in existing centres and remedying deficiencies in provision in areas with poor access to facilities;
- Allowing competition between retailers and enhanced consumer choice through the provision of innovative and efficient shopping, leisure, tourism and local services in town centres which allow genuine choice to meet the needs of the entire community (particularly socially excluded groups).

2.3 The statement advises that Local Planning Authorities (LPAs) should plan positively for growth and development by assessing the need for further main town centre uses and ensure there is capacity to accommodate them (taking account of the role of centres in the hierarchy); and to identify any deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day needs. In assessing need for retail and leisure development LPAs should take account of both quantitative and qualitative need, giving additional weight to the latter in deprived areas.

2.4 In assessing quantitative need for retail and leisure development LPAs should have regard to relevant market information and economic data, including a realistic assessment of population and future growth, forecast expenditure and forecast improvements in retail sales density. In assessing qualitative need LPAs should assess whether provision and distribution of shopping, leisure and local services allows genuine choice to meet the needs of the whole community (particularly those in deprived areas), in light of the objective to promote vitality and viability of town centres and the application of the sequential approach. LPAs should also take into account the degree to which shops may be overtrading and whether there is need to increase competition and retail mix.

- 2.5 PPS4 states that, in planning for centres, regional and local planning authorities should set out a strategy for the management and growth of centres over the plan period, setting flexible policies allowing centres to respond to changing economic circumstances. LPAs should define the network and hierarchy of centres that is resilient to anticipated future economic changes to meet the needs of their catchments. Choices should be made about which centres will accommodate any identified need for growth in town centre uses, considering their expansion where necessary and the need to avoid an over concentration of growth in centres.
- 2.6 Identified deficiencies in the network of centres should also be addressed, giving consideration to the appropriateness of designating new centres; reclassifying existing centres; planning for extensions; or scope for consolidation. The need for any new, expanded or redeveloped out-of-centre regional or sub-regional shopping centre, or any significant change in the role or function of centres should be considered at the regional level.
- 2.7 In addition to defining the extent of the primary shopping area for their centres, LPAs are encouraged to distinguish between primary and secondary frontages (defined in Annex B of PPS4). Having regard to the need to encourage diversification of uses in town centres as a whole, PPS4 states that primary frontages should contain a high proportion of retail uses, while secondary frontages provide greater opportunities for a diversity of uses. Where frontages are identified, the appropriate local development documents should include policies that make clear which uses will be permitted in such locations.
- 2.8 PPS4 encourages LPAs to proactively plan to promote competitive town centre environments and provide consumer choice by:
- supporting a diverse range of uses (including complementary evening and night-time uses) which appeal to a wide range of age and social groups;
  - planning for a strong retail mix so that the range and quality of the comparison and convenience retail offer meets the requirements of the local catchment area, recognising that smaller shops can significantly enhance the character and vibrancy of the area;
  - supporting shops, services and other important small scale economic uses in local centres and villages;
  - identifying sites in the centre, or failing that on the edge of the centre, capable of accommodating larger format developments where a need for such development has been identified;
  - retaining and enhancing existing markets and, where appropriate, re-introducing or creating new ones, ensuring that markets remain attractive and competitive by investing in their improvement;
  - taking measures to conserve, where appropriate, and enhance the established character and diversity of their town centres.



- 2.9 LPAs should identify an appropriate range of sites to accommodate at least the first five years identified need. Sites for main town centre uses should be identified through a sequential approach to site selection giving preference to locations in appropriate existing centres in the first instance, followed by edge-of-centre locations and out-of-centre sites, with preference given to those that are more accessible or have a higher likelihood of forming links with an existing centre.
- 2.10 The impact of proposed locations for development on existing centres will also need to be assessed by the LPA, taking into account impact considerations set out in Policy EC16 which include impact on town centre vitality and viability; in-centre trade/turnover; investment in centres; delivery of development on allocated sites; and any locally important impacts on centres identified by the LPA.
- 2.11 In the determination of planning applications for main town centre uses that are not in a centre and not in accordance with an up to date development plan, PPS4 requires applicants to demonstrate compliance with the sequential approach and impact assessment taking into account the impact considerations set out in Policy EC16. Assessments of impact should focus on the first 5 years after the implementation of a proposal and should be proportionate to the scale, nature and detail of the proposed development.
- 2.12 Policy EC17.1 directs LPAs to refuse planning permission where an applicant fails to demonstrate compliance with the sequential approach or the proposal is likely to lead to a significant impact. Judgements about the extent and significance of any impacts should be informed by the development plan (where this is up to date) or recent local assessments of the health of town centres and any other published local information e.g. a town centre or retail strategy.

## **Good Practice Guide: Need, Impact and the Sequential Approach (December 2009)**

- 2.13 The Good Practice Guide is a government document published alongside PPS4. It does not constitute a statement of Government policy, but forms guidance to support the interpretation of town centre policies set out in PPS4.
- 2.14 Of most relevance to this Retail Study Update is the advice directed towards assisting LPAs in adopting a more proactive approach to planning for town centres, and particularly the role of evidence in the plan making process to identify the need for new development and inform the preparation of proactive town centre strategies. Central to PPS4 Policy EC1 the guidance sets out alternative approaches to assessing and identifying quantitative and qualitative needs for retail and other town centre uses. Building on the assessment of needs, the practice guidance explains how LPAs can plan positively and promote new retail-led and other town centre uses through their LDFs; setting out the 'tools' needed to prepare effective town centre strategies, including how to identify appropriate locations, and how to assess the effects of alternative policy options and specific proposals.

- 2.15 Having identified and evaluated the various policy options, LPAs should develop a clear vision and strategy for the network of centres, and strategies for individual centres where appropriate. In terms of the LDF, this is likely to include clear guidance on the appropriate scale and form of new development involving main town centre uses; allocation of sites to meet identified need; identification of the extent of key development opportunities; a clear statement of the approach to be taken to bringing forward development and the LPAs attitude to other competing developments.
- 2.16 It is added that strategies for individual centres can be prepared at any time but they should be incorporated into the LDF at the earliest opportunity. This is likely to be important where key site allocations are involved, either through strategic allocations in the Core Strategy, or through sites allocated in an Area Action Plan or other document. Promoting town centre strategies through the LDF process ensures that the evidence base which underpins the strategy will be properly tested. A strategy which has been progressed through the LDF process, and been subject to effective public and stakeholder consultation and tested through independent examination will ensure that proposals must be determined in accordance with the plan unless material considerations indicate otherwise.
- 2.17 When preparing their LDFs, LPAs should identify what they regard as the Primary Shopping Area (PSA) to provide clarity to applicants about the policy status of different sites. In defining the PSA, it may be appropriate to take into account the anticipated future role of the centre, and in particular the scope for growth and expansion. In centres where major expansion is planned, it may be appropriate to indicate where the PSA is likely to be extended to, having regard to the potential for achieving effectively integrated new development.
- 2.18 LPAs should also identify an appropriate 'town centre boundary' within which they should seek to locate other main town centre uses. It may also be appropriate to define other areas within the town centre but outside the PSA where specific uses are encouraged e.g. specialist retail, offices bars/restaurants etc. In addition to defining the PSA and town centre boundary, where LPAs identify a need for new development to accommodate main town centre uses, they should allocate sites which are suitable, viable and likely to be available within a reasonable timescale to accommodate such needs.

## **Regional Spatial Strategy for the East of England**

- 2.19 On 6<sup>th</sup> July 2010 Regional Strategies were revoked by the Secretary of State for Communities and Local Government and the Government confirmed that new ways for local authorities to address strategic planning issues based on cooperation will be introduced.
- 2.20 The Government's decision to revoke regional strategies was challenged by CALA Homes as unlawful. In November 2010, the High Court announced its decision which upheld CALA Home's challenge. As a consequence, the Government declared that the position is that RSS's remain as part of the Development Plan. However, it remains the Government's intention to abolish the Regional Strategies, through the Localism Bill, and this intention should be treated as a material planning consideration.

- 2.21 The RSS for the East of England (The East of England Plan) was published in May 2008. The Plan sets out the regional structure of town centres under Policy E5 which recognises Harlow as a Major Town Centre. As such Harlow, along with other designated regional cities and major towns, should be the focus for major new retail development and complementary town centre uses consistent in scale with the size and character of the centre and its role as a major town.
- 2.22 Harlow is also identified by the Plan as a Key Centre for Development and Change (Policy HA1) and the specific strategy for Harlow is to promote the renaissance of the town through developing its role as a major regional housing growth point, major town centre and strategic employment location. Specifically, the town centre should be developed to enhance Harlow's retail offer and strengthen its position within the regional hierarchy of centres. It is recognised that the growth required by the RSS is a significant uplift from that in recent years and the local delivery vehicle, Harlow Renaissance, will have a key role in its delivery.

## **Harlow District Council Local Development Framework**

- 2.23 Harlow District Council are currently still in the process of preparing their Local Development Framework (LDF) documents. Once complete, the LDF will form part of a portfolio of documents setting out current planning policy for Harlow District at the local level, providing the basis on which development control decisions are made.

### **Adopted Harlow Replacement Local Plan (July 2006)**

- 2.24 The Harlow Replacement Local Plan was adopted in July 2006. During the process of adopting the Plan, the 'Planning and Compulsory Purchase Act 2004' came into force. The policies contained in the Plan were saved for the purposes of the Act for three years from 13<sup>th</sup> July 2006. The saved Plan was therefore due to expire in July 2009. In order to retain the policies beyond this three year period, Harlow Council sought the Secretary of State's agreement to issue a direction to 'save' certain policies. In May 2009 the Secretary of State agreed that the policies submitted to the by the Council should be saved. All of the saved policies will be replaced by new policies in the emerging LDF.
- 2.25 Many of the local policies outlined in the previous Harlow Retail Study (2007) still provide relevant policy guidance until the new LDF has been completed. The relevant policies to retail planning and town centres that have been saved from the Replacement Local Plan (2006) are briefly summarised below.
- 2.26 The Plan sets out strategic policy relating to town centres and retail in Chapter 12 'Regenerating the Town Centre and Shopping'. The Council's objectives for regenerating Harlow town include the need to:
- Sustain and enhance the vitality and viability of the town centre;
  - Support and promote the physical and environmental regeneration of the town centre;

- Promote diverse and high quality uses in the town centre, including retailing, employment, leisure, entertainment and culture.
  - Assess the location of new retail developments in a sequential manner, favouring town centre sites in the first instance;
  - Retain and encourage residential development in the town centre;
  - Manage road traffic and improve access to the town centre and neighbourhood centres, whilst insuring that due weight is given to improving facilities for public transport, cycling, pedestrians, and those with special needs;
  - Sustain and enhance the vitality and viability of the neighbourhood centres and hatches and ensure their position in Harlow's shopping hierarchy; and
  - Identify new opportunities for retail and related uses in the town centre, neighbourhood centres, hatches and new residential development areas.
- 2.27 The location of retail developments should be assessed through a sequential approach that favours town centre sites first. Policy RTCS1 (The Sequential Approach) states that the need and capacity for development and how well the site is serviced by public transport and by means other than the car will be taken into account in decided whether it should be accommodated at successively lower levels in the hierarchy. Development must be appropriate to the function, size and character of the centre concerned.
- 2.28 Policy RTCS2 (Vitality and Viability) expired on July 2009 and is no longer relevant.
- 2.29 The regeneration and development of the town centre, both physically and environmentally, is a key objective for the Council. The town centre should provide a significant stimulus for the Priority Area for Economic Regeneration (PAER), by providing employment and through urban regeneration. Policies RTCS3 and RTCS4 (Town Centre and Regeneration) relate to the need to maintain and enhance the role of the town centre through new development.
- 2.30 Policies RTCS5 – RTCS9 (Town Centre Sites) specifically relate to the potential regeneration and development of Town Centre South (TCS), Town Centre Central (TCC) and Town Centre North (TCN). Harlow is well served in terms of convenience goods retailers and focus should be on increasing the amount and quality of comparison shops. Entertainment, leisure, food, drink and residential uses are particularly encouraged in TCN and improvements to the retail offer will be encouraged in TCC. These developments and improvements, alongside the existing redevelopment at TCS will be key to revitalising the town centre.
- 2.31 In order to maintain the retail shopping core of the town centre, the Council will consider the change of use of shops (A1) in accordance with primary and secondary frontages policy. Policies RTCS10 – RTCS12 (Primary and Secondary Frontages) have given more flexibility for secondary frontages to introduce uses that will complement the shops and add to the range of the town centre's offer. The policies state that the

Council will resist any changes of use that would result in the loss of key facilities in the town centre. Specifically changes of use from A1 to A2 or A3 may be permitted subject to:

- No more than 15% of the primary frontage may be occupied by non-retail uses;
- The maximum number of adjoining A3 uses is two and no more than two units out of any five are to be in non retail uses; and
- There being no loss of key facilities that contribute to the range of offer in the town centre or that act as anchors or catalysts which assist in retaining or attracting new operators.

2.32 The Plan refers to the role of the neighbourhood centres and hatches, and the important role they play in providing local facilities for residents, which can help reduce car travel and increase sustainability. The Council identify the five neighbourhood centres and 18 hatches that form the retail hierarchy in Harlow. The five neighbourhood centres are Bush Fair, Church Langley, Old Harlow, Staple Tye and The Stow. The Plan seeks to retain key facilities that are already present in the neighbourhood centres and hatches. Policy RTCS14 (Neighbourhood Centres and Hatches) specifically states that planning permission will be granted for proposals that will strengthen and maintain the role of these centres by:

- Improving the range and quality of facilities appropriate for the size of the centre to meet the needs of the local population;
- Retaining and increasing residential accommodation above shops and on previously developed land where appropriate;
- Managing road traffic and improving facilities for passenger transport users, pedestrian, cyclists and those with special needs, and providing car parking where appropriate;
- Supporting the enhancement of the neighbourhood centres and hatches and ensuring new development is of a high design quality;
- Improving facilities for disabled people, elderly people and carers with babies and children; and
- Retaining key facilities which contribute to the range of offer or act as anchors or catalysts which assist in retaining or attracting new operators in the neighbourhood centre or hatch.

2.33 Policy RTCS15 (Change of Use in Neighbourhood Centres and Hatches) seeks to ensure that key facilities and an adequate number of shops are retained in neighbourhood centres and hatches. Policy RTCS16 (The Stow and Bush Fair Neighbourhood Centres) specifically encourages proposals for the improvement of both The Stow and Bush Fair neighbourhood centres. The policy states that any proposal for the partial or full redevelopment of the centre will be considered and that all proposals must respect the existing character of the centres and their position in the architectural heritage of Harlow. Proposals should not result in the loss of key facilities that contribute to the range or offer of the centres.

2.34 The Plan also identifies neighbourhood service areas which are covered by Policies ER7 (Retaining Existing Employment Areas) and ER10 (Economic Diversity) of the Plan, as follows:

- Policy ER7 states that planning permission will not be granted for change of use to A1, A2 or A3 uses and that, to maintain the vitality and viability of the existing shopping centres, appropriate employment uses will be encouraged.
- Policy ER10 identifies the service bays as being appropriate locations for increasing the supply of employment land and providing suitable premises for small or local start-up businesses.

### Draft Harlow Town Centre Strategy Supplementary Planning Document (2006)

2.35 The Draft Harlow Town Centre Strategy has been produced by David Lock Associates and was published in December 2006. The Town Centre Strategy is a supplementary planning document that will form part of the LDF. The Strategy will inform development control decisions in the town centre, shape emerging planning policy for the town centre and establish design principles guidance for future development in the town centre.

2.36 One of the key vision objectives for Harlow Town Centre relates directly to retail. The objective seeks to consolidate and reinforce the retail offer in the town centre, in particular through the expansion of comparison floorspace. This supports Local Plan Policies RTCS5 – 9 (Town Centre Sites).

2.37 As a result of consultation with developers during the development of the Town Centre Strategy it was noted that improvements should be made to the shopping facilities in Harlow. More high street stores should be attracted to the town centre, but also smaller units with lower rents that can cater for independent/specialist retail should be created. The Strategy identifies a range of development opportunities across Harlow town centre which should provide an opportunity for national retailers and smaller independent traders.

2.38 The Town Centre North scheme is one such development opportunity, which should provide for a robust mix of town centre uses, potentially including medium and large format retail space, leisure development such as a cinema, hotel and conference facilities, and residential above mixed ground floor uses. The scheme was being led by Australian developers Stockland alongside Harlow Council and a range of other partners including EEDA, Essex County Council and the Homes and Communities Agency (HCA). However, in May 2010, Stockland announced its withdrawal from the project. We understand that Harlow Council and Harlow Renaissance are working closely with their partners to ensure that the Town Centre North scheme is able to go ahead following Stockland's withdrawal and they will be looking to procure a new development partner to deliver the scheme.

2.39 A strong amount of preparatory work has already been completed giving the Town Centre North scheme an excellent platform for moving forward. It is hoped that the proposals for Town Centre North will act as a

catalyst for the wider regeneration of Harlow. The proposals are intended to reintegrate the northern part of the town centre with the rest of the town centre and improve the quality and attractiveness of Harlow by providing new shops, a hotel, office space, as well as residential uses and entertainment facilities. The Council remains confident that the scheme will be delivered and open by 2016.

- 2.40 In addition to the above, the Town Centre Strategy names the Harvey Centre as another key part of the retail area of Harlow and an area that is likely to have the potential for significant change. The Strategy aims to introduce a mix of uses, particularly above first floor level, potentially including leisure, retail, residential, a hotel and resource centre. We are aware that planning permission exists to extend the Harvey Centre to include an additional 23,225 sqm of floorspace, although we note that a number of issues including land assembly may mean that the permission will never be implemented. Both Town Centre North and the Harvey Centre extension will have implications on other areas of Harlow, as well as neighbouring centres.

### Harlow Retail Study (2007)

- 2.41 Harlow District Council published the Retail Study and Town Centre Health Check in July 2007, prepared by GVA Grimley. The Retail Study found that Harlow town centre was relatively healthy and performing well when benchmarked against a number of health check indicators. However, the study identified some fundamental weaknesses and 'gaps' in its retail and commercial leisure offer, which need to be addressed if the town centre is to continue to fulfil its role as a Major Centre and to compete with centres in the wider sub-region. The study concluded that new investment and development was needed to meet quantitative and qualitative need for new comparison goods floorspace and commercial leisure uses.

## Summary

- National planning policy has changed since the publication of the previous Harlow Retail Study. PPS4 (Planning for Sustainable Economic Growth) was published in December 2009 and replaces PPS6 (Planning for Town Centres), which informed the previous 2007 Harlow Retail Study. The Government's key objectives in PPS4 require regional planning bodies and LPAs to proactively plan for the network and hierarchy of centres to be resilient to future economic changes and to meet the needs of their catchments. Drawing on a sound evidence base, LPAs should identify the need for new floorspace and where necessary identify sites to accommodate identified need focusing on existing centres and areas of deprivation.
- Although the Government revoked Regional Strategies in July 2010, the challenge by CALA Homes has reinstated RSSs for the time being. The Government has however stated that the intention remains to abolish RSSs through the Localism Bill and that this intention should be a material planning consideration. In line with the localism agenda, Local Authorities will be left to decide how many new homes they need and where they should be located. This reinforces the need for Local

Authorities to have a sound LDF in place. In planning for town centres, Local Authorities should have regard to PPS4 in preparing their LDF documents and assessing planning applications.

- At the local level, the Replacement Harlow Local Plan (2006) has been saved whilst work is made on Core Strategy to form part of the LDF. The Local Plan sets out clear objectives to regenerate Harlow town centre and its retail offer to promote a diversity of uses and to improve the physical environment. Following the development of Town Centre South, the Council has approved a planning application to extend the Harvey Centre to include an additional 23,225 sqm of floorspace. The Council is still developing proposals for the Town Centre North site.
- The purpose of this study is to review and update the evidence base underpinning Harlow's LDF. The study will also be used to inform development control decisions over the shorter term and help the Council to sustain a viable and vital retail centre.



## 3. NATIONAL RETAIL TRENDS

3.1 To put our assessment of the quality of existing provision and the need for additional floorspace in Harlow into context, it is relevant to consider the wider economic and social trends likely to influence retailing and leisure in the District. This section therefore examines key trends and drivers for change in the retail and leisure industries and outlines those of particular relevance to Harlow drawing from a range of published data sources, including research by Verdict Analysis, Mintel, Experian and the New Economics Foundation.

### Demographics

3.2 Over the last 15 years the UK population has increased by 3.9 million to 61.8 million, which is a rate of approximately 0.44% per annum amounting to a total increase of 6.7% over 15 years. The number of households has also increased over the same period and at a greater rate (11.5% over 15 years). The average household size has however decreased from 2.46 people per household in 1994 to 2.36 people per household in 2009, as decreasing family sizes and instances of divorce are becoming more common<sup>1</sup>.

3.3 The population is forecast to continue growing. The total fertility rate (TFR) in the UK has risen each year since 2001 and was last recorded in 2008 at 1.96 children per woman, its highest level since 1973. Although the current TFR rate has not reached the natural population replacement level of 2.1 children per woman, other factors such as increased life expectancy and immigration combine to boost projected population numbers<sup>2</sup>. These trends are forecast to continue and will affect spending habits, how much we spend, on what and where.

3.4 Over the next 20 years the 65 and over age group is expected to grow by 42.9% and the under 65s age group by only 6.4%<sup>2</sup>. Older shoppers have a younger mindset than in the past, they are more fashion aware and, in recent years, more affluent as a result of general house price growth as well as income growth (but post retirement income from pensions could become a concern if they do not achieve anticipated values). They will have more time to shop, will spend more on DIY and gardening and will expect good customer service. Clearly, the economic slowdown will impact upon disposable income and pension pots with more cautious spending patterns in the immediate future.

3.5 Younger shoppers will have higher education fees to pay, will experience higher housing costs, they will be more computer literate and spend more on-line, and will spend more on entertainment/leisure so they may have less to spend in the retail sector.

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<sup>1</sup>Office of National Statistics, 2009. Figures have been interpolated between 1991 & 2001 to account for 2001 Census data

<sup>2</sup>Office of National Statistics, 2009.

## Income & Expenditure

- 3.6 Incomes and expenditure grew strongly during the last 20 years, with retail expenditure growing faster than incomes supporting strong growth and development in the retail sector. Overall, retail expenditure increased by about 3.29% pa in real terms between 1990 and 2008, with most of this growth on comparison goods where an annual growth rate of 5.67% had been in effect between 1990 and 2008. Convenience goods spend had been growing at a much lower rate with a steady increase of under 0.86% per annum<sup>3</sup>.
- 3.7 Recent economic circumstances, however, have reversed this pattern of growth and the pace of economic recovery is expected to affect expenditure growth until at least 2012 when it is anticipated that more normal growth levels will begin to approach their normal levels. The rapid deterioration in the economy's performance during the final months of 2008 had far-reaching implications for available income and, consequently, expenditure. The outputs from this study will be widely affected by these events and the recession. Experian report as follows:

*"The detailed consumer spending forecasts used in the October document [Experian Retail Planner Briefing Note 2008] were based on figures available before the eruption of the major financial crisis in September, the collapse of consumer and business confidence and the sharp decline in the global economy.*

*Since that forecast, there have been dramatic changes in the UK's performance.*

*The new forecast incorporates the substantial decline in GDP in the second half of 2008; the sharp increase in unemployment in recent months; gloomy survey evidence that has emerged in 2009; fiscal measures adopted in an attempt to shore up the economy and the steep decline in Bank rate in the past few months."*<sup>4</sup>

- 3.8 Verdict reported that economic deterioration was rapid with the fourth quarter of 2008 seeing a year-on-year decline of 1.5% - one of the sharpest contractions in economic growth since the early 1980s. 2009 brought a sharp contraction in activity and more recent reports suggest that 'growth will be lacklustre. However, as GDP growth improves through 2012 onwards, retail expenditure should also benefit'<sup>5</sup>.
- 3.9 Growth projections used in retail studies and supporting retail statements for planning applications should therefore respond to advice in respect of the most recent economic expectations, followed by ultra long-term trends in the longer term projections. Paragraph B21, Appendix B of the *Good Practice Guide on Need, Impact and the Sequential Approach* states that expenditure growth rates should draw on national long-term trends, but may also have regard to expectations about future regional economic performance

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<sup>3</sup>ONS, Consumer Trends June 2009

<sup>4</sup>Experian Business Strategies, 2009

and to recent evidence of retail growth. It also recommends that growth rates should generally adopt a conservative level of growth in order to reflect the inherent uncertainty in economic forecasts, and the cyclical nature of the retail sector. The period up to 2011, and to some extent to 2016, will be affected noticeably by the recent recession and the weak upturn that is likely to follow, particularly for comparison goods.

- 3.10 The growth projections used within this report have therefore responded to advice in respect of the use of trend line (historic) growth rates and forecast growth rates based on consumer expectations. Due to the retail expenditure boom in the latter half of the 1990s and the first half of the 2000s and the major economic recession which is now underway, there are significant differences between these two approaches.
- 3.11 Trend growth rates have, until recently, been influenced by the spending boom of recent years (until 2007). Trend line forecasting, based on these historic trends, incorporate booms and busts since the 1960s and therefore provide a flat rate average over long and ultra long-time periods, i.e. beyond 2021. These are no longer appropriate for short-term retail projections given the current slow-down in the economy. The period up to 2016 will be affected noticeably by the current severe recession and the weak upturn that is likely to follow. The time period required to enable growth rates to return to 'boom' levels is unknown, but it is clear that this is unlikely to happen before 2016.
- 3.12 On this basis we are advised to use economic forecasts prepared by MapInfo/Oxford Economic Forecasting and Experian Business Strategies which take into consideration current and future economic instability. Evidently, the growth rates used for our retail capacity forecasting have changed as a consequence, and have considerable implications on the levels of floorspace town centres can sustain in the short-to-medium term, i.e. up to 2016.
- 3.13 Non-store retail sales, excluding e-tailing, are expected to decline over the next ten years, but this will be more than offset by the growth of e-tailing, resulting in overall growth in non-store sales in absolute and percentage terms. E-tailing is increasing strongly by both bricks and mortar retailers and non-store virtual retailers, but the rate of growth now seems to be slowing.
- 3.14 Experian published a note on 'non-store retailing' in March 2010 setting out revised estimations of Internet retail sales which are much higher than previously expected. These estimations are based on revised ONS data which adopts an improved methodology of all sales made over the Internet covering 95% of the retail sector in terms of turnover. The ONS series previously suggested in mid-2009 that Internet sales were 3.5% of total retailing sales, but the revisions now suggest the figure is nearly double this. In their note, Experian provide forecasts to 2026 which take into account the impact of broadband technology, speed of access to the Internet, problems of delivery and receipt of goods when away from home at work etc.

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<sup>5</sup> Verdict Datamonitor, July 2010, UK Retail Futures 2014: Retail & the Economy

- 3.15 The impact of growth in e-retailing on future demands for retail floorspace is an important consideration and has been factored into the forecasts set out later in this report. Factors such as the processing of online grocery orders by retailers such as Tesco in local stores, and the potential use of shops as showrooms and/or collection points may mean that the growth in Internet sales will not necessarily lead to an equivalent reduction in floorspace requirements. See the subsection on Internet shopping and e-tailing below for more information.
- 3.16 According to Verdict, customers are becoming more selective in their purchasing habits as they become more concerned about the economic outlook. With rising living costs, disposable incomes are being squeezed, and as a result customers are shopping around more to find the best possible value. Increasingly retailers are finding it harder to please customers and across all sectors, retailers are converting fewer customers into main users and shoppers are less loyal to their main stores. Such circumstances will have implications on retail capacity forecasting, particularly over the short-term.
- 3.17 Consumer spending is likely to remain weak over the coming months. Taxes are rising to pay off substantial government debt, wage growth is slowing and unemployment is rising; consumers are prioritising debt reduction; these factors are expected to combine to offset any advantages from falling inflation and ensure that spending will remain low.

## Sales Efficiency

- 3.18 In undertaking retail capacity and impact assessments it is generally accepted that an allowance should be made for growth in the turnover 'efficiency' (or 'productivity') of existing retail floorspace to reflect retailers' ability to improve their productivity. This increased efficiency helps maintain the vitality and viability of town centre businesses.
- 3.19 An efficiency growth rate represents the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (such as rents, rates and service charges) by increasing their average sales densities. The application of a turnover 'efficiency' growth rate is a standard approach used in retail planning studies and PPS4 also advocates the use of "a realistic assessment of...forecast improvements in productivity in the use of floorspace"<sup>6</sup>.
- 3.20 Although hard quantitative evidence is limited, comparison businesses in particular have, over time, increased sales densities by achieving improvements in productivity in the use of floorspace. PPS4 (EC1.4.c.iii) requires that quantitative need assessments have regard to a realistic assessment of such improvement. Analysis of past data is difficult as sales densities increases have been affected by changes in the use of retail floorspace over the last 20 years, with higher value space-efficient electrical goods replacing lower value space intensive goods, the growth in out-of-centre retailing, a number of one-off

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<sup>6</sup>PPS4, Paragraph EC1.5.c.iii

events like Sunday-trading and longer opening hours and the very strong growth of retail expenditure relative to the growth in floorspace.

- 3.21 Evidently, in the current economic climate many retailers have struggled to increase or even maintain sales density levels and, together with other financial problems, have led retailers into closure, such as Woolworths and Adams. With the expectation of weaker expenditure growth in the future, sales density growth is also expected to decrease. For comparison goods, we are now incorporating an efficiency growth rate of 1.5% per annum in the period 2010 to 2015 and 2.0% per annum between 2015 and 2025. For convenience goods we have incorporated an efficiency growth rate of 0.4% per annum between 2010 and 2015, and 0.5% per annum post 2015.

## Employment

- 3.22 Between 1998 and 2007 retail expenditure has increased by approximately 5.5% per annum, but retail employment has increased much more slowly. Over the same period total employees in retail employment in Great Britain have increased from 2.63 million to 2.76 million, an increase of 0.5% per annum. However, this growth has been made up mostly part time employment. Full time equivalent (FTE) employment has increased very little<sup>7</sup>.
- 3.23 Over the next 15 years Experian Business Strategies expect a 13% increase in FTE employment in the retail sector with a slightly higher increase in part time employment. Evidently, this needs to be monitored in the forthcoming years based on the slow down in the economy and corresponding growing levels of unemployment with significant consequences for available retail expenditure and retail sector employment positions<sup>8</sup>.

## Size of Units

- 3.24 The growth of multiple traders and increased competition between companies has meant that the retail structure is increasingly dominated by large companies requiring larger shop units. Shopping centres and out-of-centre development that has been able to accommodate this demand for larger sized units (typically 500-2,000 sqm or larger) have grown in importance, reinforcing the trend of higher order centres and out-of-centre retailing growing in relative importance (i.e. polarisation in the retail hierarchy).
- 3.25 The growth in the size of stores has caused a contraction in the number of shop units and consumer choice. This is particularly evident in the food sector, with a marked decline in the number of smaller and more specialist food retailers (greengrocers, butchers, fishmongers, bakers etc), and a large increase of superstores. This is indicated by Verdict Research which shows a 5.5%% reduction in the total number of

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<sup>7</sup>Annual Business Enquiry, 2009

<sup>8</sup>Experian, FTE Employment Levels, Retailing (SIC 2003 code 25)

convenience stores between 1998 and 2008, as space is concentrated into a smaller number of larger stores.

- 3.26 Over the same time period the number of superstores (>2,323 sqm net) has increased by 39%; food specialists and off licences/tobacconists have also declined - by 32.9% and 56.6% respectively. These trends may well weaken in the future due to possible market saturation of large foodstores and concerns over lack of competition due to the market dominance of a few key multiples<sup>9</sup>.
- 3.27 Out-of-town store sizes have also increase in size between 1998 and 2008, over the period average out-of-town store sizes have increased from 1,939 sqm by 5% to 2,037 sqm<sup>10</sup>. Average town centre retail store sizes increased slightly between 1998 and 2008, rising from 183 sqm to 193 sqm, an increase of 5.5%<sup>11</sup>.

## Foodstores

- 3.28 Due to the restrictions on developing large new foodstores, there has been growth in the number of applications for the extension of existing foodstores and an adjustment in the composition of floorspace within existing stores over the last ten years. There has been an increased emphasis on the sale of comparison goods at the expense of convenience goods, as expenditure growth rates for comparison goods are much higher than for convenience goods and profit margins are greater, although sales densities are often lower.
- 3.29 This trend poses an increasing threat to smaller centres, as larger foodstores will increasingly sell a wider product range of day-to-day convenience and comparison goods and services. According to Verdict, comparison goods floorspace in the larger format stores of the top four grocers now accounts for averages of between 18% (Morrisons) and 40% (Asda) of net retail floorspace<sup>12</sup>.

## Internet Shopping / e-Tailing

- 3.30 Internet sales have grown rapidly and affect how and where we shop, although the rate of growth slowed markedly in 2008. In the early days of Internet retailing, back in the late 1990s, growth was due to the emergence of virtual retailers. Things have moved on in recent years and recent research indicates that much of the growth in Internet sales has been from sites of established retailers (e.g. Tesco, Argos, John Lewis etc.), who are creating "virtual outlets" to expand their market shares of retail spend.
- 3.31 In 2008 there was an increase of 1% in the number of Internet users to 35.4 million people, and an 18.1% increase in online shoppers to 26.7 million shoppers. More recent estimates suggest that the total online

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<sup>9</sup>Verdict Research, Datamonitor: "UK Food & Groceries Retailers 2009"

<sup>10</sup>Verdict, Datamonitor: "UK Out-of-Town Retailing 2009"

<sup>11</sup>Verdict Research, Datamonitor: "UK Town Centre Retailing 2009"

shopping population grew by a further 6.7% in 2009 to 28.5m adult shoppers, equating to 55.9% of the adult population<sup>13</sup>. In their report, Verdict highlight that the Internet is playing an increasingly important role, not just as a shopping channel, but in the entire shopping experience particularly as a research tool. This role is intensifying due to the rise in the use of mobile phones which enables consumers to access information anytime, anywhere which will affect shopping decisions.

- 3.32 High street retailers have particularly benefitted from the growth of Internet shopping as their brand are widely recognised and trusted by consumers. They also benefit from greater buying power, which means they are often able to offer discounts. Price-comparison sites have also increased the trend towards price cutting on the Internet, particularly in relation to small electrical products, CDs and software.
- 3.33 E-tailing however still only accounts for a fraction of total sales for mainstream retailers in the UK. Furthermore, sales on the Internet have to some extent been a switch from mail order and for some retailers (e.g. Tesco) involve sales from shop rather than warehouse floorspace. Even where sales are from warehouses, shop floorspace may still be required to fulfil a showroom function. In addition there are a growing number of signs that the Internet is beginning to mature and enter a new, more subdued phase of growth. Growth in the number of shoppers between 2009 and 2014 is estimated to reach 6.2m adults, an increase 17.1% which represents a deceleration of growth as the online shopping population approaches saturation
- 3.34 Verdict predicts a significant alteration in the products and sectors which consumers shop for online coming out of the recession. It is anticipated that the recession will leave a lasting impact on consumer attitudes towards spending and with the advantage of low price and added convenience, the Internet is expected to become even more attractive to shoppers. The offer of cheaper connections and other incentives expect to see the take up rates of less affluent shoppers achieve substantial growth. Verdict also anticipate significant growth in older shoppers (55+) which will eventually become a crucial target for retailers; particularly as within 10 years Internet-adept 35-44 year olds will move into the 55+ demographic, taking their Internet shopping habits with them.
- 3.35 As a consequence of this growth, there will continue to remain reasonable pressure on the traditional brick and mortar retailers in the UK's town centres. Shoppers are able to select their own retail mix online and shopping centres will need to compete with this choice, which is not only driven by price and range, but also service and expertise. Town centres will increasingly have to provide a shopping 'experience' that the Internet is unable to match. In accordance with PPS4, the emphasis should be on the overall town centre experience, the mix of uses, and not just the retail offer.

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<sup>12</sup>Verdict Research: "Grocery Sales Analysis Sheet", 2008

<sup>13</sup>Verdict Research: "UK e-retail 2010", April 2010

## Shopping & Leisure

- 3.36 Due to increased affluence and mobility, and the rise of the Internet, shoppers no longer merely shop to satisfy 'needs', they increasingly shop to satisfy 'wants' as well. Retailing in the higher order centres and the more attractive smaller centres is changing and arguably becoming more of a quasi leisure experience. Leisure spending growth is continuing to outstrip that of retail, and despite the economic slowdown, at the moment consumers seem to be willing to continue spending on leisure.
- 3.37 Quality restaurants, coffee shops, cafes and bars, as well as health and fitness centres and multiplexes in larger centres, are therefore important to attract shoppers and encourage longer stays and higher spending. Harlow already has many of these leisure facilities on offer. Better integration of retail and leisure facilities mutually benefits both sectors. Pedestrianised streets and covered retail areas are also important in attracting shoppers, as is the overall attractiveness of the town centre, along with good accessibility and car parking.
- 3.38 A number of factors have helped drive the growth of leisure provision in town centres. Planning policy is important as is the fact that urban living is fashionable. Town centres can offer consumers a much more vibrant atmosphere in which to eat and drink and they also offer a much wider choice of leisure venues, allowing more spontaneous decisions. For bars, restaurants and health & fitness clubs, the attraction of the town centre is 'daytime trade' and the ability to capitalise on proximity to businesses and shoppers.

## Summary

- Incomes and expenditure have shown strong growth over the last 20 years, with retail expenditure growing faster than incomes. This has seen corresponding increases in sales densities within existing retail floorspace, which has also been driven by factors such as high value space efficiency and longer opening hours. Crucially, the economic crisis will have an impact on the retail sector, and growth forecasts will need to reflect recent publications from Experian Business Strategies.
- The composition of town centres has changed through new development, with a growing number of companies requiring larger shop units to meet their shop format ratios. This has again favoured the larger centres which generally have the space to meet such retailer requirements. This is particularly noticeable in the convenience sector, which has begun to offer an increasing supply of comparison goods in the larger foodstores, in addition to the traditional product offer; such stores therefore require more retail floorspace. The dominance of such foodstores has led to current concerns about market dominance and the lack of competition.
- As competition from the Internet increases, town centres need to offer a quality destination where people want to spend time and gain access to facilities not available on the web. There has been a continued polarisation towards larger centres and the provision of larger stores in these centres.



Where smaller centres have been unable to diversify their offer or create niche markets and a mix of retail, leisure and service facilities they have suffered.

- Leisure spending growth is continuing to outstrip that of retail, and despite the economic slowdown, at the moment consumers seem to be willing to continue spending on leisure. The mix of uses in a town centre is vital to offer choice to shoppers, and quality restaurants, coffee shops, cafes, bars and other leisure facilities are all important to encourage frequency of visit and longer stay times.
- Reports now suggest that the recession has officially ended but the economic growth outlook remains weak and fragile in the UK. It is expected that 2010 will be a difficult year but gradual improvements will follow.

## 4. SUB-REGIONAL CONTEXT

- 4.1 This section examines the retail performance of Harlow in the context of the retail network across the wider sub-region. Our analysis draws on the household telephone survey results and other data (including PROMIS, Javelin Retail Rankings, the Focus Property Intelligence database, the Valuation Office Authority and EGi) to identify the main retail offer and floorspace provision in each competing centre, and the extent to which this is likely to change and influence shopping patterns in the region in the future.
- 4.2 The household telephone survey highlights that the main centres that compete with Harlow include Bishop's Stortford, Greater Brookfield, Welwyn Garden City, Waltham Cross, Lakeside Shopping Centre, Enfield, Central London and Chelmsford. The location of each centre in relation to Harlow and the extent of the telephone survey area is illustrated on Plan 1.
- 4.3 Summary tables showing the performance indicators for each competing centre are included in Appendix 1A. The rank of each competing centre has been derived from Javelin (Venuescore 2009). Javelin Group's Venuescore provides an up-to-date ranking of UK shopping venues across a number of key indicators – scale, market positioning, fashionability and age positioning of the retail offer. The score attached to each operator is weighted to reflect their overall impact on shopping patterns. For example, anchor stores such as John Lewis, Marks & Spencer and Debenhams receive a higher score than unit store retailers to reflect their major influence on shopping patterns. The resulting aggregate score for each venue is called its Venuescore.
- 4.4 Shopping patterns derived from the telephone survey allow us to calculate the amount of comparison goods expenditure that each competing centre draws from within the District. This indicator takes into consideration the strength of the retail offer as well as the centres' accessibility and distance from Harlow. The total expenditure leaking to these centres is set out in Table 4.1 below, and illustrated on Plan 2.

**Table 4.1: Study Area Comparison Goods Trade Draw: Key Competing Centres (Appendix 1B)**

Centre	£ (000s)	Market Share (%)
<b>Harlow</b>	<b>£256,533</b>	<b>23.9%</b>
Edinburgh Way Retail Warehousing	£215,048	20.0%
Bishop's Stortford	£113,880	10.6%
Brookfield	£74,963	7.0%
Welwyn Garden City	£59,316	5.5%
Waltham Cross	£53,670	5.0%
Lakeside	£40,965	3.8%
Enfield	£39,741	3.7%
Central London	£34,367	3.2%
Chelmsford	£30,518	2.8%

Source: Household Telephone Survey, June 2010

- 4.5 It is evident that Harlow town centre is the most dominant centre in terms of comparison goods trade drawing circa £256.5m of comparison goods expenditure (24%) from within the survey area, a strong proportion of which is retained within the District boundary. It is apparent that the concentration of retail warehousing provision located along Edinburgh Way is also performing strongly, drawing circa £215m of comparison goods expenditure (20%), which is only marginally lower than the town centre. It is evident from Plan 4 that this concentration of retail warehousing draws from a wide catchment extending across the whole survey area.
- 4.6 Outside the District, Bishop's Stortford appears to be Harlow's main rival in terms of comparison goods trade in the study area, drawing £113.8m (11%) of comparison goods expenditure. However, this is not surprising given that the centre is located within the survey area (Zone 6). Furthermore, it is evident from Plans 3 and 5 that each centre has a clear core catchment area and there is actually very little overlap between the two.
- 4.7 Other competing centres are generally less influential, drawing 7% or less available comparison goods expenditure from the survey area. However this does not take into account any future planned retail development schemes in these centres which may influence current shopping patterns. Any such schemes we have identified are included within our profile of each of the key competing centres set out below and summarised in Appendix 1C.

## Profile of Key Competing Centres

- 4.8 **Bishop's Stortford** is located approximately eight miles to the north east of Harlow town centre. The centre comprises in the region of 65,580 sqm gross retail floorspace generally concentrated along traditional high streets (Potters Street, Market Square, South Street and North Street), and within the Jackson Square Shopping Centre which is anchored by Sainsbury's.
- 4.9 The most recent Experian Goad survey (January 2010) shows that the centre has below average vacant floorspace and according to Focus there were 20 retailer demands for Bishop's Stortford in January 2010 which is greater than 14 identified for Harlow<sup>14</sup>. The centre ranks below Harlow in the Venuescore rankings and has historically achieved lower prime zone 'A' rents than Harlow. However, following a substantial decline in 2009, rental levels in Harlow have now fallen below those in Bishop's Stortford.
- 4.10 As highlighted above, Bishop's Stortford is the main rival shopping destination in the survey area with a trade draw of circa £113.8m, equating to just over 10% market share. This can largely be attributable to its location within the survey area. The extent of Bishop Stortford's influence over the District is illustrated on Plan 5 which shows that the centre has the dominant market share in Zones 4, 6 and 7 (its core catchment area) but less influential over other zones.

- 4.11 We understand that Henderson are currently pursuing the redevelopment of the Old River Lane site in the north eastern quarter of the town centre. The proposed scheme includes a new department store, an extension to the existing Waitrose supermarket, retail units, restaurants, a cinema, hotel, new homes and additional town centre car parking. The development will offer a new pedestrianised shopping street and link with the centre's current shopping streets. The scheme will enhance the centre's overall attraction and pose additional competition to Harlow.
- 4.12 **Brookfield** is an out-of-centre shopping destination located approximately 11 miles to the south-east of Harlow. Brookfield is split into two components: one element comprises two large retail stores occupied by Tesco and Mark & Spencer; whilst to the rear of the Tesco there is a small retail park comprising nine units across c.8,360 sqm gross floorspace. The retail park originally opened in 1996 and benefits from open A1 (non-food) consent. Retailers currently represented include River Island, New Look, Outfit, JD Sports, Clarks, Next, Boots & Argos Extra.
- 4.13 The Brookfield complex falls outside the survey area, located and draws approximately £75m (7%) comparison goods expenditure from the survey area. Plan 6 demonstrates that Brookfield is generally influencing shopping patterns in the west of the survey area and only exerts marginal influence over the District's zones.
- 4.14 There are proposals in the pipeline for some further retail and leisure development at Brookfield which is expected to come forward in Broxbourne's Core Strategy. The Council's pre-submission Core Strategy (August 2010) refers to 50,000 sqm of new retail and 15,000 sqm of leisure floorspace.
- 4.15 **Welwyn Garden City** lies to the west of Harlow, between Hatfield and Stevenage, east of the M1. It was built in 1920 and like Harlow, is a New Town. The centre presently comprises approximately 50,539 sqm gross retail floorspace, which is almost half that in Harlow. The main shopping area is focussed around the public gardens at Howardsgate and within the Howard Centre. Key anchor retailers in the centre include John Lewis, Marks & Spencer, Debenhams and Sainsbury's.
- 4.16 The results of the household survey indicate that Welwyn is currently attracting just over £56m (5.5%) of comparison goods expenditure from the survey area. Plan 7 shows that the centre has most influence over the west of the survey area (Zones 8 & 9) and marginal influence (less than 5% market share) over all other zones.
- 4.17 We understand that planning permission has been granted for the redevelopment of the Sainsbury's on Church Road to provide a larger store comprising circa 5,574 sqm gross. There are also preliminary proposals in the pipeline for a possible foodstore and/or leisure, residential and business uses at the Cereal Partners and Roche sites adjacent to Welwyn Garden City train station. There is also potential for

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14 The Focus Property Intelligence database provides an indication of current demand for floorspace within certain centres. It does not however represent the whole picture as only those retailers who have specifically registered their interest with Focus are counted.

further development to be identified for the town centre through the Council's LDF, although at this stage the scale and form of such development remains unknown.

- 4.18 **Waltham Cross** is located to the south-west of Harlow, just north of the M25. The centre comprises approximately 39,753 sqm gross retail floorspace which is concentrated along the part-pedestrianised High Street and within the Waltham Cross Shopping Centre. The largest stores in the centre are occupied by Sainsbury's and independent furniture retailer Fishpools. Waltham Cross ranks lower than Harlow in terms of its Venuescore rank. It also achieves lower Prime A rents and a higher shopping centre yield. Reflecting this, Plan 8 demonstrates the marginal extent of Waltham Cross' influence across the survey area. We have not identified any retailer requirements for Waltham Cross, and there are no known retail developments in the pipeline that may enhance the centre's provision or influence existing shopping patterns.
- 4.19 **Lakeside, Enfield, Central London** and **Chelmsford** have less influence over the survey area, attracting less than 4% of comparison good expenditure from the survey area. The allocation of market shares for each centre is shown on Plans 9-12.
- 4.20 We have not identified any major developments in Enfield or Central London that have potential to influence existing shopping patterns. In Chelmsford, the Town Centre AAP indicates scope to increase the centre's retail floorspace by almost 70,000 sqm net by 2021. The Council are currently considering options in bringing this forward after cancelling a development agreement with Lend Lease that appeared to be going no-where. Outline consent has also been granted for a retail-led mixed use scheme on land to the east of High Street which is likely to involve a large anchor store and unit shops alongside bars and restaurants fronting the waterside. Details of other pipeline schemes within the key competing centres are set out in Appendix 1C.
- 4.21 A further development which has potential to impact on Harlow is Westfield's Stratford City. The shopping centre is currently under construction and due to open in 2011. Upon completion, Stratford City will be the largest urban shopping centre in Europe boasting 300 brands from contemporary boutiques to established high street names such as John Lewis and Marks & Spencer. The new shopping centre will be situated in close proximity to Stratford national rail station. There are direct rail services operating between Harlow Mill and Stratford and with an average journey time of approximately 45 minutes. There are also services operating between Harlow and Stratford via Tottenham Hale with a journey time of approximately 40 minutes. In terms of drive-times, Stratford is located approximately 22 miles to the south east of Harlow and is accessible in approximately 25 minutes by car via the M11 motorway.

## Summary

- It is evident that Harlow town centre is the most dominant centre in the survey area achieving a market share of 24%, and the centre retains a strong level of comparison goods expenditure from within the District boundary.
- Harlow's retail warehouse provision, concentrated along Edinburgh Way, is also performing strongly attracting £215m (20%) of comparison goods expenditure from across the survey area.
- In terms of the sub-regional context, the household telephone survey has identified Bishop's Stortford as the main competing centre for Harlow. The proximity of Bishop Stortford is reflected by its 11% market share across the survey area, however the centre's core catchment is clearly defined (Zones 4, 6 and 7) and there is limited overlap with Harlow.
- Brookfield, Welwyn Garden City, and to a lesser extent Waltham Cross, also exert some influence over the District although market share is generally diluted across the breadth of survey area. The same can be said for Lakeside, Enfield, Central London and Chelmsford which attract less than 4% available comparison goods from the survey area.
- Notwithstanding this, additional growth in these centres has potential to increase their overall influence across the survey area and Harlow District. The development of Stratford City also poses a threat and it will therefore be important for Harlow to build on its strengths to ensure it maintains and where possible, enhances its market share, to offset any planned growth elsewhere in the sub-region.

## 5. QUALITATIVE ASSESSMENT

- 5.1 In this section we set out the results of our detailed assessment of the vitality and viability of Harlow town centre. We present out qualitative health check analysis of Harlow town centre in line with the Town Centre Health Check Indicators set out in PPS4 (attached in Appendix 2A). We also highlight any significant changes that have arisen since the previous assessment in 2007.

### Harlow Town Centre Health Check

- 5.2 Harlow town centre is located adjacent to the M11, approximately eight miles north of the M25. The town is positioned between Stevenage to the west and Chelmsford to the east. Harlow was designated as a post-war New Town in March 1947 as one of a ring of eight new planned communities around London. The vision for these New Towns was to provide freestanding communities that offered work as well as homes to those that moved there. The Masterplan for Harlow was developed by Sir Frederick Gibberd. The Masterplan created a series of self-sufficient neighbourhoods, each with its own shopping and community facilities within walking distance. Neighbourhoods are separated by green wedges bringing the countryside within easy access of every resident.
- 5.3 Harlow town centre was Britain's first pedestrian precinct. The main shopping provision in the centre is located at the Water Gardens (Town Centre South), The Harvey Centre and the traditional linear high street Broadwalk (Town Centre Central). This is supplemented by a number of more secondary shopping areas at Stone Cross, East Gate and West Gate (Town Centre North).

### Diversity of Uses

- 5.4 The Experian Goad survey of Harlow town centre (March 2009) identifies a total of 95,876 sqm of ground floor floorspace for retail trade and services, comprising 294 units. This information is drawn from the most recent 'category report' produced by Experian Goad which provides a detailed breakdown of uses within the following categories: Convenience, Comparison, Service and Vacant. These reports marginally vary from Experian's 'town centre reports' used in the previous study which lists various miscellaneous outlets (e.g. Post Office, Employment/Career Services) that are now included within the broader 'Services' label in the category reports. Whilst this does result in some minor discrepancies between the retail composition established in the previous study, the more up-to-date information is considered the most accurate and relevant data for the purposes of the study. Our health check analysis is also informed by site visits undertaken in May 2010.
- 5.5 Table 5.1 sets out the current retail composition in terms of the number of units. It is evident that the centre continues to have a below average representation of units occupied by convenience goods retailers, although the representation of convenience goods retailers has increased slightly from -2% to -

1% since the previous study. The centre continues to have an above average representation of units occupied by comparison retailers, increasing by 1.1% since the previous retail study. The number of service operators remains below average (-8.53%) although this does not necessarily indicate the need for additional provision. It is necessary to carefully monitor and manage new service businesses in the centre to minimise the risk of undermining the comparison retail function of the town centre.

**Table 5.1: Harlow Retail Composition by Number of Units**

Retail Category	No. of Units	% of Total	UK Average (%)	Variance
Convenience	23	7.82	8.83	-1.01
Comparison	106	36.05	33.96	2.10
Service	110	37.41	45.94	-8.53
Vacant	55	18.71	11.27	7.44
<b>Total</b>	<b>294</b>	<b>100</b>	<b>100</b>	<b>-</b>

Source: Experian Goad Category Report, March 2009

- 5.6 On closer analysis, in terms of the more detailed breakdown of provision, Harlow continues to have no off licences, fishmongers or greengrocers, and contrary to the previous study there are now no butchers within the town centre. However, this apparent deficiency in more specialist convenience goods retailers is compensated for by an above average provision of more general convenience goods provision, including bakers, confectionery tobacco and news (CTNs) and health food shops. There are two large convenience stores in the town centre, both of which include fishmonger and butcher facilities. There is also an edge-of-centre Sainsbury's store which is discussed in more detail later. Additional information on the main foodstore provision in Harlow is provided in Appendix 2B and discussed in more detail later in this section.
- 5.7 As highlighted above, Harlow has above average representation of comparison retailers. In particular, Harlow has strong representation from those within the ladieswear, menswear and general clothing categories. There is also above average representation in other comparison retail categories including footwear, charity shops, jewellery, telephones, department and variety stores, toiletries, cosmetics and beauty products and toy, games and hobbies retailers. Harlow has a below average representation from retailers selling furniture, electrical goods, crafts, gifts, china and glass. Overall, the centre offers a good range of comparison goods and since the previous study it is evident that the women's clothing offer has increased.
- 5.8 Service uses in the centre account for 37.41% of all retail units. This is 8.53% below average and consistent with the previous study. Closer analysis highlights a low proportion of dry cleaners and laundrettes, financial services and property services. In contrast, there is above average proportion of banks and employment and careers services. Representation from opticians, travel agents and vehicle repair units are broadly in line with the national average.



5.9 In terms of leisure services there is a below average representations of fast-food take aways, public houses and restaurants and there is also limited hotel or guest house provision, although a new Holiday Inn is currently under construction at Crown Gate, to the south of the bus station. There is above average proportion of cafés, bingo and amusements and disco, dance and nightclubs. The number of bars, wine bars, casinos and betting offices and theatres in the centre is consistent with the national average.

5.10 Harlow has no evident leisure quarter and leisure uses are generally dispersed throughout the centre. There is representation from multiple pub chains including Wetherspoons and Yates Wine Lodge which are located in Town Centre North, along with a Liquid nightclub. There are several food and drink outlets located towards the edge of the town centre on Terminus Street. There is also a cluster of restaurants and cafés in the Water Gardens development.

5.11 Other key leisure uses include:

- The Playhouse Theatre;
- Esporta Health and Fitness Club;
- First Bowl; and
- Mecca Bingo.

5.12 Table 5.2 sets out the retail composition of Harlow in terms of floorspace. It is evident that the proportion of floorspace in the convenience and service categories is below average. The proportion of service floorspace has decreased since the previous retail study and remains below average (-11.63%). In contrast, the proportion of comparison retail floorspace is above average (+10.13%), reflecting our analysis above. The level of vacant floorspace in the town centre is also above average, which we discuss in more detail later.

**Table 5.2: Harlow Retail Composition by Floorspace**

Retail Category	Floorspace (sqm)	% of Total	UK Average (%)	Variance
Convenience	10,749	11.21	14.51	-3.30
Comparison	45,541	47.5	37.37	10.13
Service	25,836	26.95	38.58	-11.63
Vacant	13,750	14.34	9.54	4.80
<b>Total</b>	<b>95,876</b>	<b>100</b>	<b>100</b>	<b>0.00</b>

Source: Experian Goad Category Report, March 2009

## Retailer Representation

5.13 The presence of multiple retailers in a centre can enhance the appeal of that centre. In March 2009, Experian identified 132 multiple retailers in Harlow (55.23%), and it would appear that the number of

multiples has increase since the previous study. This suggests that the centre is performing reasonably well, particularly as nationally there has been a trend of withdrawal of multiple retailers that have gone into administration.

- 5.14 Closer analysis shows that the majority of multiples are within the comparison retail category, representing 67% of the total number of comparison outlets. Within this category, there are a number of multiple clothing stores such as New Look, Sports Direct, Monsoon, Primark, Topshop and River Island. There are also several multiple mobile phone shops including O2, Phones 4 U and T Mobile. Other key multiples in the centre include Marks and Spencer, Bhs, Wilkinson and Boots. Quality anchor retailers that are notably absent from the town centre include department stores, for example, John Lewis, House of Fraser and Debenhams. There is also generally limited representation from higher quality fashion operators and homeware retailers although we acknowledge that H&M is soon to open in the Water Gardens.

### Town Centre Composition

- 5.15 The town centre can be broadly divided into three areas: Town Centre South, Town Centre Central and Town Centre North; and we discuss each in turn below.

#### i) Town Centre South

- 5.16 Town Centre South predominantly comprises the new Water Gardens development. The development opened in 2004 providing 12,077 sqm of retail floorspace. The scheme is anchored by an Asda superstore and consists of a range of different sized retail units along a purpose built pedestrianised street which connects to the existing shopping area via Broadwalk. There are also two large warehouse style units occupied by Matalan and TK Maxx, and a 1,200 space multi-level car park, new council offices, an Esporta health club and four restaurant and café units. The overall area offers a pleasant, modern shopping environment and we observed high levels of footfall here at the time of our site visit.
- 5.17 The majority of units in this shopping area are occupied by multiple retailers including Next, HMV, River Island, Topshop, JD Sports, Sports Direct and Dorothy Perkins. Multiple restaurants and café operators include Esquires Coffee Shop, Pizza Hut and Nando's. The mainstream offer in this location is reflective of the more modern retail development providing large, well configured units that are suitable to accommodate contemporary retailer requirements.
- 5.18 Asda opened in 2003 and currently has a floorspace of approximately 5,026 sqm net. The store offers a good range of convenience goods including a delicatessen, fishmongers, bakery and hot food counter. The store also has a café, photo department and pharmacy on site. The store is open 24 hours and benefits from an adjacent car park with approximately 1,200 spaces.

5.19 As highlighted in our previous study, the Water Gardens scheme appears to be trading well and offers a good variety of town centre uses. Under the provisions of Local Plan Policy RTCS12 the area is also now designated within the primary retail frontage given that trading has commenced.

#### ii) Town Centre Central

5.20 Town Centre Central represents a substantial and strategic part of the town centre containing two core shopping areas; The Harvey Centre and Broadwalk. These areas are designated within the primary shopping frontage. The Central area also comprises Little Walk (primary shopping frontage), East Walk, Terminus Street, West Gate (secondary shopping frontages) and Playhouse Square (no designated frontage). The majority of the central area is pedestrianised with the exception of Terminus Street, which acts as a public transport interchange for the town centre; and Westgate and Playhouse Square, which are on the edge of the town centre.

5.21 Little Walk is a covered shopping street currently identified as primary shopping frontage, however many of the retailers located here are small, independents. Many of the stores offer discount products or are charity shops and almost a third (32%) of units are vacant. One of the key constraints of Little Walk is the size of the units, which are unlikely to meet modern retailer requirements such as larger floor plates.

5.22 The Harvey Centre is the oldest managed shopping centre in the town centre. The centre opened in 1982 and comprises approximately 33,444 sqm of retail floorspace over two levels. The centre is currently anchored by BHS, Marks and Spencers, Wilkinson, Tesco Metro and Primark. Other multiple retailers in the Harvey Centre include La Senza, H. Samuel, Thomas Cook, Superdrug and Poundland. The Centre has a good mix of different sized units and a good proportion of larger units that would be favourable to modern multiple retailers. The first floor is largely occupied by small independent retailers and specialised shops, although there are also some multiple retailers including Argos and Sole Trader. There are a noticeable number of vacant units on the first floor, particularly towards the South-Western wing which is more secluded. Two vacant units are sizeable (c. 1,500 sqm gross) which suggests that this part of the centre is not currently appealing to retailers.

5.23 As highlighted above, Tesco Metro is one of the shopping centre's key anchors, although situated to the rear of the shopping centre it is rather secluded. Tesco opened in 1982 and originally operated over two floors; however it was downsized as part of a re-fit and currently has a floorspace of approximately 3,031 sqm net. The store offers a range of convenience goods, including a delicatessen, bakery and hot food counter consistent with the 'Metro' format. The store is served by a multi-storey car park adjacent to the Harvey Centre which has approximately 770 spaces. The Tesco is open between 8am and 7pm Monday to Wednesday, 8am and 8pm Thursday and Friday, 7:30am and 7pm on Saturday and 10am and 4pm on Sunday.

5.24 In the previous retail study we noted that planning permission had been granted to include a new department store and 22 additional retail units at the Harvey Centre, equivalent to approximately 22,249

sqm of additional floorspace. The permission remains valid but we understand that it is unlikely to be implemented arising from changes in ownership of the Harvey Centre.

- 5.25 Broadwalk is a linear street running along the eastern edge of the Harvey Centre and is traditionally the main spine route through the town centre linking the Harvey Centre with the Water Gardens and the Town Centre North area. However, Broadwalk is somewhat constrained by units that are small and poorly configured. Retailers currently located here include Shoe Zone, Bon Marché, WHSmith and The Body Shop.

### iii) Town Centre North

- 5.26 Town Centre North includes North Gate, part of West Square, Post Office Road and Stone Cross which are within the secondary shopping frontage and Kitson Way and Post Office Road which do not have any frontage designation.
- 5.27 There is currently a mix of uses in Town Centre North. In the west at West Gate and West Square there is a 629 space multi-storey car park, a vacant cinema, offices and service uses such as estate agents, building societies and betting offices, and a Wetherspoon Public House. There are also many vacant units and footfall here appears to be generally low.
- 5.28 The focus of Town Centre North is Stone Cross, a large open space where a market has been operating for the last 50 years. On Tuesday, Thursday, Friday and Saturday there is a general market with a variety of stores and on Mondays there is a second hand market. During our site visit in May 2010, the market did not appear to be trading well, with a large number of empty market stands and few shoppers in this area of the town centre. One and two storey buildings surround Stone Cross Square and the retail units are occupied by a range of lower order operators and services including a large post office and sorting office, Yates Wine Lodge and Natwest bank. Adjacent to Stone Cross Square there are two nightclubs and a cluster of takeaway units. Current plans for the improvement of this area are underway.
- 5.29 This area of the centre continues to have the highest proportion of vacancies. Many of the retail fascias are poorly maintained and this has resulted in a somewhat cluttered and run down appearance. The quality of the environment is generally poor, with evidence of graffiti and poor paving in some areas. However, as highlighted above, plans to improve this area are underway.
- 5.30 The Local Plan sees this area playing a key role in diversifying the overall offer of the town centre, providing entertainment, leisure, food and drink uses that will strengthen the evening economy. The area has been identified for redevelopment to provide a hotel and conference centre as a catalyst for other development. The Plan indicates that there is scope to relocate existing uses from Town Centre North to other areas of the town centre and that Town Centre North would provide an appropriate location to relocate the Playhouse. Various other sites within the area are identified for redevelopment within the

Local Plan. We understand that the redevelopment of the area will also remain a key priority for the Council over the forthcoming LDF period.

- 5.31 A scheme to redevelop Town Centre North has been developed by Harlow Council to re-integrate the northern part of the town centre with the rest of the town centre and improve the quality and attractiveness of Harlow by providing new shops, a hotel, businesses, residential uses and entertainment facilities. The Council is currently looking to secure a new development partner to assist the regeneration of the town centre. The implications of this development coming forward are discussed in more detail in Section 6.

## Vacant Retail Property

- 5.32 Table 5.3 illustrates the differences in vacant property since the previous retail study. The most recent Experian Goad survey (March 2009) identifies 55 vacant retail units in Harlow, comprising of a total of 13,750 sqm gross vacant floorspace. We have identified nine additional vacant units since the 2006 Experian Goad survey, although this has no bearing on the overall percentage of vacant units. The amount of vacant floorspace has increase by 2,788 sqm since 2006, although in overall percentage terms it has decreased. Notwithstanding this, vacancies in terms of both unit count and floorspace remain above average.

**Table 5.3: Harlow Town Centre Vacancy Rates**

	Vacant Units	% of Total Units	National Average (%)	Vacant Floorspace sqm gross	% of Total Floorspace	National Average (%)
2009	55	17%	10%	13,750	10%	8%
2006	46	17%	10%	10,962	13%	8%

Source: Experian Goad Town Centre Report (January 2006) and Experian Goad Category Report (March 2009)

- 5.33 As highlighted previously, vacant units are predominantly located in Town Centre Central and Town Centre North. Specifically there are clusters of vacant units on the first floor of the Harvey Centre, Little Walk, West Walk and West Gate, East Gate and the top end of Broadwalk. At West Walk and West Gate the high number of vacant units reflects where the Harvey Centre has consent for expansion. The vacant units in the Harvey Centre, Broadwalk and Little Walk are located within the primary shopping frontage which could be a cause for concern. As suggested previously, the increase in vacant units, especially in Little Walk may be a result of retailers seeking larger premises, or a result of recent economic difficulties and retailers either entering into administration (e.g. Whittards) or seeking more affordable premises. In the Water Gardens there is only one vacant unit, which we note is currently under offer.
- 5.34 It was evident from our site visit in May that several vacant units are being used as display and advertising space by retailers or for local projects, events and exhibiting art work. This generally improves the appearance of units and helps contribute to maintaining an active frontage.

## Retailer Requirements

- 5.35 Table 5.4 sets out the number of retailer requirements for Harlow, together with relative changes in its rank order, over the period between 2005 and 2010. It is evident that retailer requirements in the town have declined since the previous study. The centre's rank position has significantly declined since 2005, dropping from 154<sup>th</sup> in 2005 to 283<sup>rd</sup> in 2009, suggesting that the centre is not performing as well, relative to other centres. The Council should address the decline in rank position of the town centre.

**Table 5.4: Harlow ranking of Retailer Requirements**

No. Requirements	Ranking (1st Highest)	Date
14	283rd	January 2010
16	235th	April 2009
-	-	April 2008*
38	211th	April 2007
50	153rd	April 2006
50	154th	April 2005

Source: Focus Property Intelligence, May 2010

\*Data not available

- 5.36 In May 2010, we identified 15 requirements for Harlow including one department store (TJ Hughes) and nine comparison retailers (The Fragrance Shop, Ann Summers, Sportec, Machine Mart, 99p Stores, Profile Clothing, Dr China, Hatton Goldsmiths and Fonehouse). The remaining five requirements are from convenience and service operators (including Masion Blanc Pâtisserie, Millies Cookies, Greggs, Subway and Frankie and Bennies). In total, operators require between 3,923 and 18,394 sqm gross of retail floorspace in Harlow (Table 5.5). A detailed list of requirements is included in Appendix 2C.

**Table 5.5: Harlow Retailer Requirements**

Retail Category	No. of Units	Min. Floorspace (sqm gross)	Max. Floorspace (sqm gross)
Convenience	3	176	278
Comparison	10	3,376	17,484
Service	2	371	632
<b>TOTAL</b>	<b>15</b>	<b>3,923</b>	<b>18,394</b>

Source: Focus Property Intelligence, May 2010<sup>15</sup>

<sup>15</sup> The Focus Property Database provides a broad indication of demand but does not necessarily capture all interest. There may be additional requirements for Harlow which have not been formally registered with Focus.

## Retail Rents and Yields

- 5.37 The level of rent which retailers are prepared to pay for retail space within a centre is an indication of the perceived strength of a centre (although factors such as the availability of floorspace have an impact on rental value). In 2009, Prime Zone A retail rents in Harlow were recorded at the lowest level since 1987 when they were previously £732 per sqm. Table 5.6 shows that since 1995 rents in Harlow have gradually increased, and have remained static at £1,076 per sqm between 2003 and 2008. The recent downturn in the economy is expected to have contributed to the 30% fall in Prime Zone A rent between 2008 and 2009. Harlow is currently achieving lower rents than competing centres in the sub-region, particularly Stevenage and Welwyn Garden City, where rents were £861 and £1,022 respectively in 2009.

**Table 5.6: Prime Zone A Rents in Harlow (per sqm)**

1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
£915	£1,023	£969	£1,023	£1,076	£1,076	£1,076	£1,076	£1,076	£1,076	£753

Source: Colliers CRE, 2009

- 5.38 The commercial yield on non-domestic property is an indication of the confidence of investors in the long term profitability of the town centre. The yield on property investment represents the return (in the form of rent) on capital to an investor. As property investments do not usually produce a fixed income (i.e. rents are reviewed according to market conditions, and the terms of the property's lease), the greater the prospect of future rental growth, the lower the initial yield which an investor would be prepared to accept. Conversely, a higher yield reflects the lower expectation of future rental growth prospects. Yields are therefore an indicator of expectations of the general economic prospects for a town centre.
- 5.39 Valuation Office data highlights that yields in Harlow have decreased from 7% in 2000 to 5.75% in January 2008. Yields rose slightly to 6% in 2008. This suggests that despite the recent economic instability, Harlow has maintained and increased investor confidence over the period between 2000 and 2008.

## Accessibility

- 5.40 Harlow benefits from reasonably high accessibility. The centre is well connected to the local and primary road network: the A414 bypasses the town to the north and west, linking Harlow to Hartford and St Albans to the west and Chipping Ongar and Chelmsford to the east. Harlow is also situated at Junction 7 of the M11 which runs north to Cambridge and south to London, 8 miles from the M25 at Junction 27. Stansted Airport is within 20 minutes drive from Harlow.
- 5.41 Harlow train station is situated outside the town centre, approximately 20 minutes walk. Although it is possible to walk from the station to the town centre, pedestrians have to cross a busy dual carriageway which acts as a significant barrier to movement. There are frequent rail services direct to London

Liverpool Street every 15 minutes with journey times of approximately 30 minutes. The Stansted Express train service also runs through Harlow.

- 5.42 Train services between Harlow and London can stop at Stratford City and this could pose potential competition to Harlow town centre once the Westfield shopping centre opens in 2011. Westfield Stratford City will comprise 883,920 sqm of retail and leisure space and will be the largest urban shopping centre in Europe.
- 5.43 A number of bus services operate in and around Harlow, stopping along Terminus Street in the town centre. Buses run from Mondays to Saturday to surrounding centres including Stevenage, Heathrow Airport, Stansted Airport, Chelmsford, Romford, Brentwood, Waltham Cross, Loughton and Chingford. There are also local bus services that link the Hatches and Neighbourhood Centres with the town centre.
- 5.44 There are a number of car parks in the town centre including, both multi-storey and surface level, and in total there are approximately 3,659 car parking spaces. The car parks are located around the edge of the town centre, within walking distance of the shops. All car parks are pay and display.
- 5.45 The results of the 2010 household survey indicate that 83% of visitors to Harlow town centre travel by private vehicle when shopping for clothing, footwear and other fashion goods. In terms of public transport, the survey indicates that 13% travel by bus, whilst just 0.5% travel by train. A low 3.7% of visitors choose to walk to the centre and none cycle.
- 5.46 In terms of main-food shopping, the survey indicates that the majority of visitors that use the Asda at the Water Gardens for this purpose choose to drive by private vehicle (82.5%) whilst 12.5% choose to walk and just 2.5% travel by bus. In contrast, the results of the survey suggest that those that use the Tesco Metro either travel by bus (75%) or walk (25%).

## Environmental Quality

- 5.47 The quality of Harlow's shopping environment and public realm varies across the town centre. The Water Gardens development in the south provides a modern shopping centre environment with contemporary architecture, high quality street furniture and good quality paving. The original Water Gardens have been restored to provide a pleasant public realm with landscaped gardens and a water feature which acts as a focus. Restaurants and cafes here have outdoor seating areas looking out over the gardens.
- 5.48 The rest of the town centre remains inward looking. Blank facades, often accompanied by car parks which surround the town centre and a number of service yards, offer poor visual gateways into the centre and do not appear very attractive.
- 5.49 In Town Centre Central, the Harvey Centre and Little Walk offer indoor shopping facilities, but the appearance of these areas are now dated and in areas, run down. Broadwalk pedestrianised street is also



looking dated and poor in appearance. Town Centre North continues to be the most run down area of the town centre, and investment in this location should remain a priority. Vacant units add to the poor appearance of the area, although it has been recognised that some vacant units are being utilised to promote other retailers, art works and public information, which helps to maintain an active frontage and alienates the detrimental affect that vacant units can have on a high street.

## Customer Views & Behaviour

5.50 The 2010 household telephone survey included questions on the frequency of visits to Harlow town centre and visitor likes/dislikes. The key findings are summarised below:

- 89% of residents within the survey area visit Harlow town centre. Of these, the majority (22%) visit the centre once a month whilst 15% visit once a fortnight, 11% visit once a week and 10% visit two-three times a week. Just 2% visit everyday whilst 11% never visit the centre. As we would expect, there is generally a higher frequency of visits from those living within Zones 1 and 2.
- 32% of visitors cited the 'good range of chain/well known stores' as something they like about Harlow. 23% cited the 'good range of independent stores'; 19% cited 'close to home'; and 10% cited 'good and/or free car parking' as features they like about the centre. However, 32% also cited 'nothing/very little'.
- In terms of dislikes, the majority (43%) cited 'nothing/very little' although 11% cited 'unattractive shopping environment/atmosphere'; 9% cited 'vacant shops'; and 8% cited 'lack of non-food stores'. 'Difficult to park' was cited by 6% and 'lack of food stores' was cited by 5% as features that are disliked.
- 46% indicated that 'nothing' would make them visit Harlow more often although 17% cited 'more department stores' and 8% cited 'more higher order / designer stores' and 'more non-food stores'. 6% also indicated that they would visit the centre more often if there were more specialist, unusual and independent shops and a general improvement of the environment.

## Development Opportunities

5.51 As part of this update, we have not carried out a detailed assessment for Harlow town centre as various sites in and around the town centre have already been identified through existing Local Plan policy and highlighted in the previous study. However, it is evident from our health check analysis that there is a strong qualitative need for the redevelopment of Town Centre North in particular in order to reverse further physical decline. The Council have long-recognised the opportunities for the area, particularly in terms of enhancing leisure and night-time economy uses, and this should remain a key priority for the Council over the plan period.

## Strengths, Weaknesses, Opportunities, Threats

- 5.52 We have prepared a detailed SWOT analysis for the town centre which is set out in Appendix 2D. In summary, Harlow has numerous strengths particularly in terms of its composition of town centre uses. The centre offers a good mix and range of shopping and leisure activities and draws a high proportion of residents living within the survey area (89%) demonstrating its strength and influence over the District and beyond.
- 5.53 There are however some weaknesses which need to be addressed in order for the centre to be able to compete effectively with other centres and planned growth elsewhere in the sub-region. The decline of Town Centre North is the most prominent issue for the town centre, particularly given that the developer's chosen to bring forward the redevelopment of the area have recently withdrawn from the scheme. Notwithstanding this, we understand the Council is still committed to bringing forward the redevelopment of the area and hope to see it completed by 2016. The potential for this area is long-recognised and offers a clear opportunity to expand the centre's retail core to accommodate new quality retail development as part of a comprehensive mixed use scheme envisaged for the area. This is discussed in more detail in our conclusions and recommendations.

## Edge/Out-of-centre Retail Provision

### Comparison

- 5.54 In terms of edge/out-of-centre provision, Harlow has a large range of retail warehousing located within the north of the District. There are five retail parks in Harlow which are all located along Edinburgh Way:
- **Harlow Retail Park** is located on the north side of Edinburgh Way, adjacent to the Queensgate Centre. The retail park is anchored by Comet, Homebase and Argos.
  - **The Queensgate Centre** is located on the north side of Edinburgh Way, adjacent to the above retail park. There are thirteen retail units here including, among others, PC World, Toys R Us, Currys, SCS and Brantano. There is also a cinema and several café/restaurant uses adding a leisure component.
  - **Princes Gate Retail Park** is located on the south side of Edinburgh Way, adjacent to The Oaks retail park. The retail park is anchored by Wickes, Go Outdoors and Paul Simon.
  - **The Oaks Retail Park** is located on the south side of Edinburgh Way, adjacent to Princes Gate retail park. There are eight retail units in this retail park, including B&Q, Carphone Warehouse, Halfords, Carpet Right and Harveys.

- **St James Centre** is located to the south of Edinburgh Way, to the west of the Tesco store. The complex comprises three retail warehouses occupied by Pets at Home, The Range and Allied Carpets.

5.55 In addition to the above retail parks, there is also a standalone Dreams retail warehouse along Edinburgh Way.

## Convenience

5.56 Harlow has two major out-of-centre foodstores: the aforementioned Tesco on Edinburgh Way and the Sainsbury's at Allende Avenue.

5.57 Tesco at Edinburgh Way is located approximately 2.8 miles to the north east of Harlow town centre. It is conveniently located off the ring road A414 (Edinburgh Way) and is visible from the main road. The store opened in 1994 and has a retail floorspace of approximately 3,874 sqm net. The store is open 24 hours and offers the full standard range of convenience goods including a delicatessen, fishmongers, butchers, bakery and hot food counter. The store also has a café and a petrol station on site.

5.58 The Sainsbury's at Allende Avenue is located 0.2 miles north from Harlow town centre, on the opposite side of Fourth Avenue. The store also opened in 1994 and has a retail floorspace of 5,505 sqm net. This includes an extension which was granted planning consent by the Council in 2007 (ref: 07/00145). The store is open between 7am and 11pm Monday-Friday, 7am and 10pm Saturday and 10am and 4pm Sunday. The in store offer includes a full range of convenience goods including a delicatessen, fishmongers, butchers, bakery and hot food counter. The store also has a café, petrol station and pharmacy on site.

## Summary

- Our analysis of Harlow town centre indicates that, at present, the town centre appears to be performing reasonably well in relation to a number of the PPS4 town centre health check indicators, although it is evident that some areas are performing better than other and there are clearly certain weaknesses that remain and should be addressed in order for Harlow to fulfil its role as a regional Major Town Centre.
- Accessibility to Harlow town centre is good. The centre is easily reached by train, bus and car and the majority of the town centre is pedestrianised. However, the centre is inward facing with poor gateways.
- The recently developed Water Gardens shopping area provides an enhanced public realm, whilst the Harvey Centre is looking dated, and Town Centre North is generally unattractive and poorly maintained. There is the potential to improve linkages between these three areas of the centre to

enhance integration and improve the overall quality of the public realm particularly in Town Centre North.

- Harlow town centre has maintained a good retail composition in terms of comparison and convenience goods. There is scope to strengthen centre's evening economy by improving the range of uses on offer.
- The representation of multiple retailers in Harlow town centre has improved since the previous retail study. Multiple retailers are generally located in Town Centre South and lower order and independent shops are generally located in Town Centre North, whilst Town Centre Central benefits from a mix of both. There is however still scope to improve representation from more mid-range and higher order retailers as well as the more specialist/quality independent retail offer. There is also the general need to address the decline of Town Centre North.
- The town centre continues to have a high vacancy levels. Vacancies are prevalent throughout Town Centre North and Town Centre Central although this reflects areas of opportunity for redevelopment or expansion. Vacancies in primary shopping frontages can be a cause for concern and it may be that the Council should consider re-designating certain areas, e.g. Little Walk to secondary frontage to provide more flexibility to enable these units to become occupied. Retailer requirements and the centre's ranking have declined in Harlow since the last retail study. This highlights the importance of addressing the weaknesses of the town centre.
- Out-of-centre retail provision in Harlow is strong although it is generally concentrated in one area with a high number of bulky goods retailers which is performing a complementary retail role to the town centre.

## 6. CAPACITY PROJECTIONS

- 6.1 In this section we estimate the current performance of retail provision in Harlow as the basis for forecasting the need for additional retail floorspace to the period 2031, incorporating the interim years of 2015, 2020, 2025, 2026 and 2031. The capacity tables accompanying this assessment are attached in Appendices 3 and 4. It is important to note that capacity forecasts become increasingly open to margins of error over time and should be updated over the LDF period.
- 6.2 We have used a conventional and widely accepted step by step methodology, consistent with best practice, which draws upon the results of the household telephone survey of shopping patterns to model existing flows of available expenditure to Harlow and identified out-of-centre retail provision. In order to develop the baseline position, we have:
- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode areas comprising the Harlow catchment area (illustrated on Plan 1);
  - Allocated the available expenditure to the convenience and comparison goods shopping destinations, drawing on the household telephone survey of shopping patterns, so as to provide estimates of current sales and forecasts of future sales;
  - Compared the total expenditure attracted to each shopping destination with current retail floorspace to assess sales densities in each shopping destination.
- 6.3 Building on the baseline position, we have explored capacity for further convenience and comparison goods retail floorspace within the District.

### Data Inputs

#### Survey Area and Household Survey

- 6.4 In order to provide detailed factual information on shopping patterns in the District, we commissioned a new household telephone survey covering 1,000 households. GVA Grimley designed the survey questionnaire in consultation with Harlow District Council and NEMS Market Research Company – who undertook interviewing and data processing in June 2010. We reviewed the survey area used in the previous study but based on the previous results some amendments were made for the purposes of this study. The 2010 survey area is illustrated on Plan 1. Given that the survey area and zones vary, only very general comparisons should be made between the headline results emerging from of the two studies.
- 6.5 Consistent with the previous survey, the 2010 survey results identify shopping habits of households for both convenience and comparison goods. Where necessary, the survey results have been re-based to

remove certain responses, such as “internet/mail order shopping”, to ensure consistency with categories excluded in the expenditure projections. For convenience goods, the household telephone survey included questions on ‘main’ and ‘top up’ food shopping. The results of the two types of food expenditure were then merged through the application of a weight, we used a 75%/25% food/top-up food weighting which reflects the estimated proportion of expenditure accounted for by each type. This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore for each survey zone.

6.6 The survey also includes seven questions on specific comparison goods types, which coincides with Experian Business Strategies definitions of comparison goods expenditure. The modelling exercise uses the weighted averages of the household survey responses for each goods type based on the proportion of per capita spend on that goods type. This process establishes pattern of residents spending for each zone in terms of the following types of goods:

- clothing and footwear;
- furniture, floor coverings and household textiles;
- DIY and decorating supplies;
- domestic and small electrical appliances (tv, hi-fi, radio, etc); and
- personal goods (jewellery, glassware, books, stationary, gardening and pet related products).

### Estimates of Population in the Survey Area

6.7 Population estimates and forecasts were drawn from the Experian e-marketer in-house system. This provides estimates of population based on trendline projections and the 2001 census for small, localised areas. Overall, the population of the survey area within Zones 1-11 is currently 382,677. It is forecast to grow to 397,844 by 2015, 414,497 by 2020, 430,777 by 2025, 433,670 by 2026 and 436,584 by 2031 (Table 1, Appendix 3 & 4). Overall, the population is forecast to grow by 14% between 2010 and 2031 across the whole survey area.

### Available Expenditure in the Survey Area

6.8 The Experian e-marketer system provides estimates of per capita expenditure for convenience and comparison goods in 2008 prices. We have made deductions for special forms of trading (SFT) which represent expenditure not available to spend in the shops, i.e. internet and catalogue shopping based on the most up to date information provided by Experian. We have applied individual per capita expenditure figures across each survey zone to provide a more detailed understanding of available expenditure in different parts of the catchment area.

- 6.9 As explained in Section 3, we have applied growth rates for comparison goods of 1.1% for the period 2008 – 2009; -0.1% for the period 2009 to 2010; 2.3% from 2010 to 2015; and 4.7% from 2015 onwards. For convenience goods we use growth rates of -0.5% per annum between 2008 and 2009; 0.1% between 2009 and 2010; 1% for the period 2010 to 2015; and 0.5% per annum from 2015 onwards. We expect more growth will take place on comparison goods as opposed to convenience goods as the scope to purchase more food is more limited than the scope to purchase non-food goods. These assumptions take into account current economic circumstances and the recent recession and demonstrate the levels of growth expected as a consequence over the period to 2031.
- 6.10 Taking these considerations into account, we have generated expenditure by zone to highlight variations across the survey area and grown them accordingly to 2015, 2020, 2025, 2026 and 2031 (five year forecasting periods as required by PPS4). Table 2, Appendix 3, applies per capita expenditure within each zone to population forecasts, which indicates that total available convenience goods expenditure within the survey area is currently £700.2m. This is forecast to grow to £757.2m by 2015; £805.4m by 2020; £856.3m by 2025; £865.5m by 2026 and finally to £893.3m by 2031. This equates to an overall growth of £193m (28%) between 2010 and 2031 (Table 3, Appendix 3).
- 6.11 Table 3, Appendix 4, sets out the total available comparison goods expenditure within the survey area by again applying per capita expenditure within each Zone to population forecasts. This indicates that total available expenditure within the survey area is currently £1,075m. This is forecast to grow to £1,220m by 2015; £1,597m by 2020; £2,087m by 2025; £2,200m by 2026 and finally to £2,786m by 2031. This equates to an overall growth of £1,711m (159%).

## Floorspace Data

- 6.12 The comparison and convenience floorspace data used in our modelling has been drawn from a range of data sources including the Institute of Grocery Distribution (IGD), Harlow District Council, the Trevor Woods retail warehouse database and Experian Goad town centre category reports. Our floorspace assumptions for foodstores include, where appropriate, an adjustment to identify the proportion of purely convenience goods floorspace. Most superstores include a proportion of non-food floorspace and we therefore have adjusted the net floorspace to identify the proportion of sales space allocated for convenience goods. This accords with the expenditure data and the expenditure assumptions used.

## Convenience Goods Shopping Patterns

- 6.13 Large foodstore provision in the District includes Asda at the Water Gardens and Tesco Metro at the Harvey Centre, both in Harlow town centre. There is also an M&S Simply Food in the town centre. Outside the town centre, other large foodstores includes Tesco, Church Langley, Sainsbury's, Allende Avenue and Tesco, Edinburgh Way. There is also a Lidl at Staple Tye. Plan 13 illustrates the location of key convenience stores across the District.

- 6.14 Overall, the District's foodstores draw 26% of available convenience goods expenditure in the survey area (Zones 1-11). We have reviewed the shopping patterns of those residents living within the zones that broadly correlate with the District boundary (Zones 1 and 2). This enables us to review the main flows of food shopping trips and the competition arising between town centre and out-of-centre foodstores both within and beyond the District. The findings are included within Appendix 3 (Tables 4-19) and Table 6.1 below. It is evident that the District currently retains approximately 88% of available convenience goods expenditure within Zones 1 and 2. This is a particularly strong level of retention and indicates only marginal leakage of trade to competing provision located further afield.

**Table 6.1: Convenience Good Market Share**

	Zone 1	Zone 2
Retained Expenditure (£m)	£76,178	£34,286
Market Share (%)	88%	89%

Source: Household Telephone Survey, June 2010

- 6.15 On closer analysis it is evident that the out-of-centre foodstores (Sainsbury's, Allende Avenue and Tesco, Edinburgh Way) and the Tesco at Church Langley are the most dominant stores in the District, whilst those stores located within the town centre (Asda, Tesco Metro and M&S) achieve a much lower market share in the core zones (Zones 1 and 2). This is demonstrated in Table 6.2, which also sets out shopping patterns in Zones 3 and 5 which are partially located within the District boundary.

**Table 6.2: Convenience Shopping Patterns in Harlow District**

		HARLOW TOWN CENTRE			CHURCH LANGLEY	OUT-OF-CENTRE	
		Asda	Tesco Metro	M&S Simply Food	Tesco	Sainsbury's Allende Ave	Tesco Edinburgh Way
Zone 1	Main Food	8%	1%	-	<b>37%</b>	22%	22%
	Top Up	12%	-	7%	<b>21%</b>	16%	5%
Zone 2	Main Food	12%	8%	1%	8%	<b>37%</b>	27%
	Top Up	9%	8%	3%	8%	<b>36%</b>	13%
Zone 3	Main Food	6%	4%	-	2%	<b>25%</b>	14%
	Top Up	7%	2%	2%	2%	<b>13%</b>	2%
Zone 5	Main Food	5%	-	-	16%	14%	<b>58%</b>
	Top Up	6%	2%	-	5%	5%	<b>22%</b>

Source: Household Telephone Survey, June 2010



- 6.16 Overall the survey identifies very little leakage of convenience expenditure from the District's core zones. The only exception is Zone 3, where 29% of residents are drawn to the Sainsbury's in Hoddesdon for their main food and top up food shopping. This is not surprising given that only a small part of Zone 3 is situated within the District boundary.
- 6.17 In total we estimate that the convenience stores in Harlow town centre (Asda, Tesco Metro and M&S) have a combined turnover of £37.4m. However, if the stores traded at company average levels, the turnover would be £77.7m. Our analysis indicates that the Asda at the Water Gardens store is not trading as well as we would expect; with an estimated turnover of £27.4m this is almost half our estimate based on company average sales (£54m). This is consistent with the findings of the previous study which identified that the store was undertrading by 57%. Again, it is not clear why the Asda's performance is significantly below its company average, particularly as the store appeared to be popular at the time of our site visit and the store's management have indicated that they are performing well.
- 6.18 According to the survey results, the Tesco Metro is also trading below company average with an estimated turnover of £5.3m compared to a potential £20m based on company average sales. Again, this is consistent with the findings of the previous study although it is possible that the under-performance of the Tesco, relative to its company average, may be attributable to the location of the store which is tucked away within the Harvey Centre and also the fact that it is now a rather dated and cramped store. The M&S Simply Food is also trading marginally below average with a turnover of £2.7m compared to £3.3m. The performance of the town centre stores reflects our analysis above and the dominance of the out-of-centre stores and the Tesco at Church Langley in Zones 1, 2, 3 and 5.
- 6.19 Our analysis indicates that the Tesco at Church Langley is performing very well with an estimated turnover of £43.8m which is above our estimate based on company average sales (£37.4m). Sainsbury's, Allende Avenue is performing very well with an estimated turnover of £50m whereas our estimated benchmark, based on the company's average sales density, is £35.3m. This is a strong performance. The Tesco at Edinburgh Way is also performing reasonably well, with an estimated turnover of £46.5m which is broadly in line with company average (£45m).

## **Convenience Goods Capacity Forecasts**

- 6.20 We have examined the baseline capacity for further convenience goods floorspace at the global level across the District up to 2031. In assessing capacity for future convenience goods floorspace, we have assumed that the efficiency with which existing floorspace is being used will increase over time, and we have therefore assumed an annual growth in sales per sqm net of 0.4% between 2010 and 2015, growing to 0.5% between 2015 and 2031.
- 6.21 The baseline forecasts for global capacity will enable the District to test alternative options for the spatial distribution of new development. By forecasting at the District level, the Council can make informed policy choices about where the capacity should be met depending on a range of other considerations such as

site availability and accessibility. Capacity arising in a specific centre/out-of-centre location does not necessarily mean that identified capacity should be met within that centre/location. A more appropriately located site in a nearby centre may encourage, for example, more sustainable travel patterns.

- 6.22 In order to ensure our baseline capacity forecasts are as up to date and robust as possible we have taken into account new convenience goods developments already coming forwards in the future as a result of existing planning permissions. The Council have identified a single convenience goods commitment for a new Aldi store at the Stow neighbourhood centre. The Council granted consent for the 990 sqm net store in March 2010 and we have therefore assumed that it will be delivered by 2015.
- 6.23 The previous study identified a commitment to extend to the Sainsbury's store at Allende Avenue. We understand from the Council that planning consent (ref: 07/00145) to extend the store's trading area to 5,050 sqm net has been implemented and we have therefore removed this as a commitment for the purposes of this update and assume that this is now the trading floorspace.
- 6.24 Taking into account the survey-derived performance of all existing foodstores across the District, including both in-centre and out-of-centre stores, the commitment for a new Aldi at the Stow, and based on an average sales density for a major foodstore operator (£10,000 per sqm net), we project a **global** oversupply of capacity in the short-term (up to 2015). However, reflecting population and expenditure growth our forecasts show capacity arising in the region of 357 sqm net by 2020, increasing to 1,759 sqm net by 2025, 1,922 sqm net by 2026 and 2,110 sqm net by 2031. This is demonstrated in Table 6.3 which sets out estimated residual expenditure forecasts over the period to 2031 and translates it into floorspace capacity based on a large store format (£10,000 per sqm) or a discount/value store operator (£4,000 per sqm).

**Table 6.3: Projected Residual Expenditure and Capacity in Harlow District (Baseline)**

	2015	2020	2025	2026	2031
Residual Expenditure (£000)	-£3,647	£3,735	£18,865	£20,716	£23,311
Capacity assuming Major Store Operator (sqm net)	-358	357	1,759	1,922	2,110
Capacity assuming Discount/Value Store Operator (sqm net)	-894	893	4,398	4,806	5,274

Source: Tables 20 & 21, Appendix 3

- 6.25 Whilst the above capacity forecasts suggest a notional over supply of floorspace in the District, this is to a reasonable degree attributed to the performance of the Asda at the Water Gardens which, according to the household survey is not performing as well as would be expected. Based on our own observations and direct discussions with the store's management, it is our view that the survey has understated the performance of the store. In practice, if the survey has understated the performance of Asda, it is likely to have overstated the performance of other stores in the survey area, in which case the overall capacity

identified in Table 6.3 will not materially be affected. However, to some extent there will also be people using the Asda store as part of linked-trips for top-up shopping as well as a degree of in-flow of trade from beyond the survey area, neither of which are captured by the household survey but could have a bearing on capacity.

- 6.26 In qualitative terms, we believe there is a case to support a new foodstore within the town centre to anchor TCN and bring forward the much needed regeneration of the area. There is a strong justification and the support of PPS4 for the redistribution of expenditure currently drawn to the out-of-centre foodstores, notably the Sainsbury's, Allende Avenue, back into the town centre. Given the likelihood that the Asda is trading better than suggested by the survey results, we do not consider that the provision of a further, well integrated new foodstore within the town centre would be likely to materially affect the Asda store. We consider that a new foodstore in the centre could provide an important anchor to the TCN area.

## Comparison Goods Capacity Projections

- 6.27 It is evident that existing provision of comparison goods floorspace in the District, predominantly located in Harlow town centre and out-of-centre retail warehousing at Edinburgh Way, currently retains approximately 75% (£191.7m) of available comparison goods expenditure within the District's core zones (Zones 1, 2, 3 and 5).

### Harlow Town Centre

- 6.28 Tables 4 and 5 in Appendix 4, indicate the trade draw of Harlow town centre, and Plan 3 illustrates the extent of the town centre's influence throughout the survey area highlighting variations in market share. Across the entire survey area, Harlow town centre draws 24% of total available comparison goods expenditure (£256.5m). The majority of this spend comes from Zones 1 (39%), 2 (48%), 3 (40%), 5 (38%) 8 (26%) and 10 (32%). Reflecting the proximity of competing centres such as Bishop's Stortford, Brookfield, Welwyn Garden City and Chelmsford, Harlow's influence is reduced in the peripheral zones (e.g. Zones 4, 6, 7, 9 & 11).
- 6.29 On the basis of current market shares, we estimate that Harlow town centre will have a comparison goods turnover of £292.2m in 2015, rising to £383.6m in 2020, £503.4m in 2025, £530.8m in 2026 and £672.5m in 2031 (Table 5, Appendix 4). Based on an existing comparison goods floorspace of 38,195 sqm net<sup>16</sup>, we estimate that the town centre currently has a comparison goods sales density of £6,716 per sqm net. This is a reasonable performance and is consistent with our expectations for a centre of Harlow's scale and retail offer.

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<sup>16</sup> This figure is based on the most up-to-date Experian Goad Category Report (March 2009) with an adjustment to account for mezzanine floorspace.

## Out-of-centre retail provision

- 6.30 The main out-of-centre retail provision in the District is distributed along Edinburgh Way, which is approximately two miles to the north east of Harlow town centre. There are five retail parks and approximately 32 retail warehouse units with a collective floorspace of 45,373 sqm net (Table 8, Appendix 4). In addition, there are several restaurant/café units as well as a multiplex cinema, which add a complementary dimension to the retail function of the area.
- 6.31 It is evident that the retail parks are performing very well with a turnover of £215m which is relatively similar to the turnover of the town centre (£257m). Based on the combined floorspace of the retail warehousing, this equates to a sales density of £4,740 per sqm which is higher than our estimate based on company average sales (£3,020 per sqm) and re-emphasises the strong performance of the District's out-of-centre retail provision. Plan 4 illustrates the extent of the retail parks' influence throughout the survey area highlighting variations in market share. It is evident that the retail parks attract trade from across the survey area but have a particularly strong market share in Zones 1 (36%), 2 (37%), 3 (26%), 4 (22%), 5 (38%) and 11 (26%).

## Comparison Goods Global Capacity Projections

- 6.32 In assessing capacity for future comparison goods floorspace, we have assumed that the efficiency with which existing floorspace is being used will increase over time, and we have assumed an annual growth in sales per sqm net of 1.5% between 2010 and 2015, growing to 2% between 2015 and 2031. Based on the performance of existing floorspace we would expect new floorspace to achieve at least £5,500 per sqm net, and have translated residual expenditure into floorspace on this basis. This assessment has assumed that Harlow will maintain its existing market share and we have forecast the capacity for new floorspace in the years 2015, 2020, 2025, 2026 and 2031.
- 6.33 Our forecasts take into account all known commitments that will effectively take a claim of existing available expenditure. It is our understanding that there is a single commitment for a new mezzanine in Unit 13 (formerly Woolworths) at the Water Gardens which will create approximately 359 sqm net of additional comparison floorspace. It is generally accepted that mezzanine floorspace achieves a lower sales density and we have therefore estimated the turnover generated by the proposed mezzanine on the basis that it will achieve a sales density in the region of £4,500 per sqm. This equates to an estimated turnover of £1.6m in 2010 (Table 9, Appendix 4).
- 6.34 By virtue of growth in population and expenditure we have projected that increases in available comparison expenditure will create global residual expenditure of £28m in 2015, increasing significantly to £143.9m by 2020, £306.6m by 2025, £344.8m by 2026 and £593.4m by 2031. This translates to surplus capacity to accommodate an additional 4,724 sqm net by 2015, 22,004 sqm net by 2020, 42,451 sqm net by 2025, 46,798 sqm net by 2026 and 78,972 sqm net by 2031 (Table 10, Appendix 4). Table 6.5

demonstrates the breakdown of global capacity arising in the District, and capacity arising specifically in Harlow town centre over the period to 2031.

**Table 6.5: Capacity for additional Comparison Goods Floorspace in Harlow (sqm net)**

	2015	2020	2025	2026	2031
<b>GLOBAL</b>	<b>4,724</b>	<b>22,004</b>	<b>42,451</b>	<b>46,798</b>	<b>78,972</b>
Harlow Town Centre	2,402	11,747	22,822	25,176	42,626

Source: Tables 10 & 12, Appendix 4

6.35 Planning permission has also been granted to extend the Harvey Centre to create an additional 11,567 sqm net comparison retail floorspace incorporating a new department store and 22 additional retail units. However, since the previous study there has been no progress with the scheme and delivery remains uncertain. Consistent with the previous study, we have therefore not treated the scheme as a commitment.

6.36 However, if the extension does proceed and on the basis that it will provide an estimated 11,567 sqm net additional comparison retail floorspace, we assume it could achieve a comparison goods turnover in the region of £48m by 2015 (Table 9, Appendix 4). Table 6.6 illustrates residual capacity, based on constant market share, if the extension to the Harvey Centre were to go ahead.

**Table 6.6: Capacity for additional Comparison Goods Floorspace with the Harvey Centre extension**

	2015 (sqm net)	2020 (sqm net)	2025 (sqm net)	2026 (sqm net)	2031(sqm net)
<b>GLOBAL</b>	<b>-3,380</b>	14,590	35,668	40,135	72,374
Harlow Town Centre	<b>-5,702</b>	4,334	16,040	18,513	36,029

Source: Tables 11 & 13, Appendix 4

## Town Centre North

6.37 The plans for the regeneration of Town Centre North include proposals for new shops, a hotel, business and homes alongside transformed public spaces and entertainment facilities. In terms of retail, the proposals seek to achieve a major change in the retail offer for the town centre that will include a major department store, a foodstore anchor and a new market facility. Since Stockland's withdrawal from the proposals in May 2010, the Council and Harlow Renaissance have been working on revised proposals and we understand that they will shortly be entering the procurement process to select a new development partner for the scheme. At present therefore there is still a reasonable degree of uncertainty about the scale, form and phasing of the new development.

- 6.38 Appendix B in the Good Practice Guidance highlights factors, including ‘the potential of certain centres to accommodate significant development’ (Para B.54), will have a key bearing on what assumptions are made about future market shares. It is the commercial reality that new development in the town centre will increase Harlow’s attraction and market share across the survey area.
- 6.39 Based on a reasonable assumption that new development and investment in Harlow town centre will result in a step change in the quality of its shopping offer we have modelled the possible uplift in the town centre’s market share within each zone across the survey area by 2020. Based on existing shopping patterns and geographic proximity, we consider that there is greatest potential for the town centre to consolidate its market share in Zones 1 and 2 and we have modelled an uplift in market share of 25% in these zones. Drawing on existing shopping patterns and the proximity of competing provision, we have modelled a market share uplift of 15% across the remaining zones (Zones 3-11). The detailed effects of our assumptions on market share uplift are set out in Table 1, Appendix 5. It should be noted that we have not assessed impact as part of this analysis and any future proposals would need to have regard to the relevant tests in PPS4.
- 6.40 It is evident that the combination of market share uplift across the survey area results in an overall uplift in the town centre’s market share from 24% to 28% by 2020 (Table 3, Appendix 5). Whilst we have not assessed trade draw patterns in any detail, it is evident that the town centre’s increase in market share could to a large degree, be achieved through trade diversion from existing out-of-centre retail provision in the District which benefits from a 36% market share in Harlow’s core catchment (Zones 1 & 2). There is also reasonable scope for the centre to claw back trade currently drawn to other competing centres such as Lakeside and Central London, which draw 10.1% and 3.5% from Zone 1 respectively.
- 6.41 The increase in the town centre’s market share by just four percentage points would result in a net additional floorspace capacity of 22,300 sqm net at 2020, compared to 11,747 sqm net based on the constant market share baseline scenario. This is forecast to increase to 35,409 sqm net by 2025, compared to the 22,822 sqm net baseline. These floorspace figures are over and above the increase at the extension to the Harvey Centre. Capacity forecasts taking into account the Harvey Centre and market share uplift are set out in Table 4, Appendix 5 and Table 6.7 below.

**Table 6.7: Town Centre Capacity for additional Comparison Goods Floorspace assuming Market Share Uplift**

	2015 (sqm net)	2020 (sqm net)	2025 (sqm net)	2026 (sqm net)	2031 (sqm net)
<b>Without</b> Harvey Centre extension	2,402	22,300	35,409	38,194	58,806
<b>With</b> Harvey Centre Extension	-5,702	14,886	28,627	31,531	52,208

Source: Tables 3 & 4, Appendix 5

- 6.42 Consistent with the previous study, we consider that the town centre has the potential to increase its market share over the plan period, resulting in an increase in available residual spend to support new retail

floorspace. It remains the case that, in order to achieve this uplift, any new development would have to be of sufficient critical mass and quality to alter the shopping patterns of residents in the survey area and to assist claw back of shoppers and expenditure to the town. On this basis, we would still recommend that any new development would need to be anchored by a significant department store offer, along with a mix of quality fashion and comparison goods retailers.

## Summary

- Our capacity forecasts are underpinned by robust survey evidence identifying existing shopping patterns, market share and catchment area of retail provision in Harlow. Our projections indicate that the total population of the survey area is forecast to grow from 382,677 in 2010 to 436,584 in 2031 – an increase of 14.1%.
- Existing retail provision within Harlow retains a high level expenditure within the District's core zones (Zones 1 and 2) both in terms of convenience goods (88%) and comparison goods (78%). However, it is evident that a reasonable proportion of this may be attributed to out-of-centre provision including the retail parks and Tesco store at Edinburgh Way and the Sainsbury's, Allende Avenue. Consistent with policy the Council should seek to maintain and enhance market share, in particular by diverting trade currently drawn to out-of-centre retail locations back into Harlow town centre.
- Harlow town centre is performing reasonably strongly in terms of comparison goods shopping with a market share of 24% across the survey area. The centre has a particularly strong influence over the District's core zones with a 42% market share in Zones 1 and 2.
- The town centre is performing less well in terms of convenience goods shopping. The results of the household survey indicate that Asda, Tesco Metro and M&S Simply Food are underperforming relative to their company benchmarks and combined they draw just 15% market share from Zones 1 and 2 whilst the out-of-centre foodstores (Sainsbury's, Allende Avenue and Tesco, Edinburgh Way) and the Tesco at Church Langley are more dominant with a combined market share of 70% in Zones 1 and 2.
- Based on constant market share, our baseline assessment has identified no capacity for additional convenience goods floorspace over the short-term (to 2015). However by 2020 we project some capacity arising in the region of 357 sqm net, increasing to 1,759 sqm net by 2025, 1,922 sqm net by 2026 and 2,110 sqm net by 2031.
- However, in qualitative terms, we believe there is a case to support a new foodstore within the town centre to anchor TCN and bring forward the much needed regeneration of the area.
- In terms of comparison goods, our baseline assessment identifies global capacity to support 4,724 sqm net by 2015, increasing to 22,004 sqm net by 2020, 42,451 sqm net by 2025, 46,798 sqm net by 2026 and 78,972 sqm net by 2031. In the event that the extension to the Harvey Centre is delivered, this will absorb all capacity in the short-term (to 2015). However, by the virtue of

population and expenditure growth, we project that there will be global capacity in the region of 14,590 sqm net by 2020, increasing to 35,668 sqm by 2025, 40,135 by 2026 and 72,374 by 2031.

- In the town centre, our baseline assessment indicates capacity to support 2,402 sqm net additional comparison goods floorspace by 2015, increasing to 11,747 sqm net by 2020, 22,822 sqm net by 2025, 25,176 sqm net by 2026 and 42,626 sqm net by 2025. However, consistent with our global projections, all short-term capacity in the town centre will be absorbed by the extension to the Harvey Centre should it be delivered.
- We have assessed the implications of new development at Town Centre North and the possible uplift in market share by 2020 (assuming the scheme will be completed by 2016). An increase in the town centre's market share from 24% to 28%, which could be largely achievable through the re-division of trade currently drawn to out-of-centre stores and other destinations such as Lakeside and Central London, would result in a net additional floorspace capacity of 22,300 sqm net at 2020, compared to 11,747 sqm net based on the constant market share baseline scenario and without any extension to the Harvey Centre.



## 7. HOUSING GROWTH SCENARIOS

7.1 In this section we develop the baseline capacity assessment to test alternative future housing growth scenarios. The East of England Plan (2008) allocated Harlow with the requirement to deliver a minimum of 16,000 new homes between April 2001 and March 2021. However, since the revocation of RSS in July 2010 it is now the responsibility of the Council to determine locally the level of new housing to be delivered having regard to local need. As this is still to be determined, we have examined the following three housing growth scenarios and the implications for each on convenience and comparison goods capacity:

- Scenario 1 - 16,000 dwellings
- Scenario 2 - 8,000 dwellings
- Scenario 3 - 5,000 dwellings

7.2 Theoretically it is possible to estimate the amount of convenience and comparison goods floorspace that each housing growth scenario could support. The average household size in the East of England is predicted to decline over the period to 2026. Adopting a conservative approach, for the purposes of this assessment we have assumed an average household size of 2.2 which is the anticipated size by 2021 sourced from the CLG 2006-based household projections to 2031 (Table 404)<sup>17</sup>. Table 7.1 sets out the projected population that could theoretically be generated under each housing growth scenario.

**Table 7.1: Theoretical population generated by housing growth**

Scenario	Number of Dwellings	Population
1	16,000	35,200
2	8,000	17,600
3	5,000	11,000

Source: GVA Grimley, 2010

7.3 Taking into account projected expenditure growth and deductions for SFT, by 2020 we estimate that the average spend per person per annum on convenience goods in Zones 1 and (which broadly correspond with the District boundary) will be £1,912. For comparison goods we estimate that the average spend per person per annum in these zones will be £3,420 by 2020. Table 7.2 demonstrates the theoretical amount of convenience and comparison goods expenditure that will be generated under each housing growth scenario at 2020.

<sup>17</sup>Communities & Local Government (2009), 2006-based Household Projections to 2031, England

**Table 7.2: Theoretical expenditure generated by population growth**

Scenario	Convenience Goods Expenditure (£000)	Comparison Goods Expenditure (£000)
1	£67,302	£120,384
2	£33,651	£60,192
3	£21,032	£37,620

Source: GVA Grimley, 2010

7.4 The next stage in our analysis is to estimate the amount of floorspace that would be supported by the identified level of additional convenience and comparison goods expenditure. Table 7.3 provides an indication of the quantum of floorspace that could theoretically be supported under each growth scenario, on the assumption that 100% of the expenditure generated in Zones 1 and 2 is retained in Harlow. The results of this exercise are presented in Table 7.3. For convenience goods we have estimated capacity based on an average sales density for a major foodstore operator (£10,000 per sqm net) and sales density of the discounter food retailers (£4,000 per sqm net). For comparison goods we have assumed an average sales density of £5,500 per sqm net.

**Table 7.3: Theoretical floorspace capacity for Harlow generated by housing growth by 2020**

Scenario	Convenience Floorspace Capacity assuming Major Store Operator (sqm net)	Convenience Floorspace Capacity assuming Discount/Value Store Operator (sqm net)	Comparison Floorspace Capacity (sqm net)
1	6,730	16,826	21,888
2	3,365	8,413	10,944
3	2,103	5,258	6,840

Source: GVA Grimley, 2010

7.5 It should be acknowledge that this is a simple theoretical exercise with no regard to inflows and outflows of trade. It does however provide an indication that even the lowest level of population growth tested (Scenario 3 - 5,000 new dwellings) could support in the region of 2,103 sqm net - 5,258 sqm net convenience floorspace by 2020. In addition to the baseline, this suggests possible scope for between 2,460 and 6,151 sqm net additional convenience floorspace in Harlow by 2020. Depending on the composition of new residential development, a large urban extension for example, there could be scope for a new local centre with a convenience store anchor. However this would need to be fully assessed in accordance with PPS4 as part of a more detailed Local Development Document (LDD) or Area Action Plan (AAP) or as part of a detailed planning application.

7.6 In terms of comparison goods, under the lowest growth scenario we estimate capacity for approximately 6,840 sqm net comparison floorspace by 2020, albeit based on the hypothetical assumption that 100% of

this expenditure growth is retained in Harlow. In addition to the baseline, this suggests scope for up to approximately 28,844 sqm net additional comparison goods floorspace (before taking into account the any extension to the Harvey Centre or the redevelopment of Town Centre North). However, the potential for Harlow to capture a significant share of this spend depends on securing major new development which will enhance and extend the existing retail offer of the centre.

## Summary

- We have looked at the implications of new housing growth on capacity for comparison and convenience goods within the District. At the request of the Council, we have estimated the capacity generated under three different housing growth scenarios ranging from 5,000 to 16,000 new dwellings.
- It is evident that even the lowest level of population growth tested (Scenario 3 - 5,000 new dwellings) could support in the region of 2,103 sqm net - 5,258 sqm net convenience floorspace by 2020. In addition to our baseline capacity projections, this suggests possible scope for between 2,460 and 6,151 sqm net additional convenience floorspace in Harlow by 2020.
- In terms of comparison goods, under the lowest growth scenario we estimate capacity for approximately 6,840 sqm net comparison floorspace by 2020. In addition to the baseline, this suggests scope for approximately 28,844 sqm net additional comparison goods floorspace.
- This analysis is based on a simple theoretical exercise with no regard to inflows and outflows of trade. It does however provide a reasonable indication for the Council to have regard to in planning for the delivery of new housing over the plan period.
- Depending on the composition of new residential development there could be scope for the designation of new local centres in the District, although this would need to be established and fully assessed in accordance with PPS4 as part of more detailed LDDs/AAPs or through a planning application.
- This assessment highlights the need for the Council to be pro-active in developing and implementing enhanced town centre facilities to retain expenditure generated by the new population. Clearly a proportion will inevitably leak to competing centres reflecting over-lapping catchments and inflows/outflows of spend which is characteristic of town centres across the UK.

## 8. LEISURE NEEDS ASSESSMENT

- 8.1 As part of this study we have also updated our needs assessment for commercial leisure uses in Harlow. Nationally, commercial leisure covers a wide range of uses, such as cinemas (both multiplexes, and more traditional town centre cinemas), bowling alleys, night clubs, family entertainment centres, health and fitness studios; and various food and drink outlets, such as pubs and restaurants.
- 8.2 In this section, we review trends affecting the commercial leisure market, as well as the distribution of existing commercial leisure facilities in the District (Plans 14). We also look at patterns of usage using the results of the 2010 household interview survey which included a specific question regarding leisure usage to ascertain where people are going to use particular leisure facilities including cinema, theatre, eating out, visiting nightclubs, going to the gym and bowling. Whilst the results do not provide a detailed picture of which facilities respondents are referring to, it provides an indication of the most popular locations.
- 8.3 There is no robust methodology for forecasting capacity for specific forms of leisure development. In any event, new leisure formats are continually evolving, fuelled by external factors. However, to provide an indication of capacity for additional commercial leisure facilities, we have examined current and forecast growth in leisure expenditure, and reviewed the specific quantitative need for new cinema screens.

### Cinema Provision and Need Assessment

- 8.4 According to Dodona Research (2009) cinema audiences grew significantly during the 1990s, but this growth reached a plateau by the start of the current decade. Table 8.1 provides a summary of key industry indicators and charts changes in revenues and screen numbers between 2003 and 2008.

**Table 8.1: UK Cinema Market 2003-2008**

	2003	2004	2005	2006	2007	2008
Screens	3,318	3,342	3,357	3,440	3,514	3,610
Admissions (£m)	167.5	171.5	164.7	156.6	162.4	164.2
Average Ticket Price (£)	4.43	4.49	4.68	4.87	5.05	5.18
Gross Box Office (£m)	742.000	770.000	771.350	762.300	820.000	850.200
Spend per head (£)	1.70	1.75	1.80	1.85	1.90	1.95
Screen Advertising Receipts (£m)	65.000	70.000	70.000	85.000	90.000	86.500
Admission per person	2.81	2.86	2.73	2.58	2.63	2.61
Admission per screen	50,482	51,317	49,059	45,523	46,223	45,491

Source: Dodona Research 2009

- 8.5 In 2008, there were 3,610 cinema screens across the UK, of which three-quarters were multiplexes<sup>18</sup>. The remainder are traditional cinemas that have been converted to multi-screen use, large format screens such as IMAX, and screens in mixed-use venues such as arts centres. The dominant operators are Odeon and Cineworld although since the consolidation of the industry in 2005, Vue has undertaken an aggressive building programme to try and increase their market share.
- 8.6 The cinema industry is not immune from the recession and there were some closures during 2008, the majority being art centre venues rather than high street chains. The current economic downturn has hit advertising revenues but in general the industry is considered to be in good health. Indeed, in October 2009, The Times<sup>19</sup> reported that cinemas are experiencing a boom with UK cinema admissions for the first six months of 2009 at their highest levels since 2002. Although ticket prices have been rising, a night at the cinema is considered to represent a relatively cheap night out, especially for families.
- 8.7 Over the last couple of years, cinema operators have made considerable efforts to improve customer yields by introducing changes such as premium seating areas and enhancing the range of refreshments such as alcohol and higher quality food. Vue Cinemas introduced their 'Evolution' concept which provides a mix of seating types comprising bean bags and sofas as well as regular seats. National Amusements rolled out its 'Cinema de Lux' concept at three shopping malls in 2008, which is a high service concept with allocated leather seating, contemporary dining and concierge facilities.
- 8.8 Another development has been the introduction of 3D films, which are attracting premium ticket prices from operators. In the future, Dodona predict that operators of traditional cinemas, particularly those with only one or two screens, will find their competitive position eroded, especially if family audiences start travelling longer distances to larger cinemas to obtain the latest 3D experience.
- 8.9 Dodona Research suggests that very large cinemas have fallen out of favour. They cite Odeon's new 14 screen cinema in Liverpool, which opened in October 2008, the first cinema of this size to open since May 2004. It would appear that new cinemas are being built to serve smaller catchment areas and despite often having the same number of screens, the number of seats in each auditorium has been reduced.
- 8.10 Investment in new cinemas is continuing but this is no longer producing such high levels of growth so the focus has switched to replacing or relocating existing cinemas. There is also some investment in under-served areas, however Dodona consider this to be merely offsetting a decline in existing markets. Over the short to medium term, future cinema projects are likely to be impacted by the level of availability of finance for property developers, although it would appear that investment in better seating, better bars and cafés and new buildings is continuing. More recently in the midst of the recession, HMV announced that it was testing a three screen art-house format above its Wimbledon music store.

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<sup>18</sup> Purpose-built cinema complexes with more than five screens.

<sup>19</sup> The Times 'Twist in the plot as British cinema defies the recession', October 24<sup>th</sup> 2009

- 8.11 Table 8.2 illustrates the market shares of the main cinemas in the study area. Consistent with the previous study there is still only one cinema within the District and the out-of-centre Cineworld at the Queensgate Centre on Edinburgh Road remains the most popular cinema, achieving a market share of 50%. It is evident that a reasonable proportion of residents from within the survey area visit Bishop's Stortford, Enfield and Stevenage.

**Table 8.2: Dominant Cinema Destinations across the survey area**

Cinema	No of Screens	Market Share
Cineworld, Queensgate Centre, Harlow	6	50.0%*
Empire, Bishop's Stortford	6	17.2%
Cineworld, Enfield	15	12.8%
Cineworld, Stevenage	16	7.0%

Source: Dodona Research 2009 \*includes 'Odeon, Harlow' responses as the cinema has been closed since 2005

- 8.12 We have undertaken a basic quantitative need assessment for new cinemas in the study area which is included in Appendix 6A. In summary, the methodology compares population per screen UK average, with population per screen in the survey area. The shortfall highlights the need for new screens to bring Harlow in line with the national average. The process also projects forward to 2015, 2020, 2025, 2026 and 2031 taking into consideration population forecasts and the consequent growth in the need for cinema screens as identified by Dodona Research 2009.
- 8.13 Drawing on the results of the 2010 household survey we have estimated the catchment area of the main cinemas and the proportion of trade that will come from the survey area. Taking into account the catchment overlap of cinemas, we consider that the survey area is currently served by 11.6 cinema screens.
- 8.14 Across the UK, Dodona estimates that there are approximately 3,670 cinema screens, which equates to around 17,458 people per screen. At present, we estimate that there are around 33,017 people per screen in the Harlow survey area, which is below average and suggests that the area is not currently very well served by cinema screens. Aligned with population growth, we envisage that the need for additional cinema screens will increase with an estimated 23 screens needed by 2015, rising to 29 screens by 2025. This exercise is not a precise methodology and the provision of additional cinemas is likely to be governed by commercial demand. However, our analysis would suggest need for at least one additional cinema facility within the survey area up to 2025.

## Ten-Pin Bowling

- 8.15 Tenpin bowling has been established as a commercial leisure activity in the UK for over 40 years, but after a period of growth in the 1980s, decline set in during the early 1990s. Since then, however, a spate of

investment in new centres and refurbishments by recognised chain brands has revitalised the industry to a degree and ten pin bowling remains a strong family activity.

- 8.16 Mintel research (2006) acknowledged the emergence of high-end, centralised venues, but the question remains whether this can dispel the lingering sense amongst many that bowling is either passé or too child, or youth-orientated, whilst offering only basic refreshments. It would appear that it is down to the market and investor confidence to decide, although the concept is already beginning to evolve to generate customer demand. For example, the Bloomsbury Bowl Lanes in Bloomsbury offers a 50s American themed bowling venue with ancillary karaoke rooms, venue rooms for hire, DJ booths, bars, small scale cinema and a venue for bands and live performers/comedy nights.
- 8.17 There is provision for ten-pin bowling within the District – the Firstbowl facility is located on Terminus Street in Harlow Town Centre as illustrated on Plan 14. Other ten pin bowling facilities within the survey area include the Lakeside Superbowl at Bishop’s Stortford which, according to the results of the household survey, is the most popular destination for bowling drawing 33% from the survey area. The Firstbowl in Harlow is the next most popular destination attracting 24%, whilst the Hollywood Bowl in Stevenage attracts 21% from the survey area. Closer analysis shows that each facility generally draws from a local catchment e.g. Harlow is the dominant bowling centre in Zones 1, 2, 3 and 10, whereas the Lakeside Superbowl in Stortford has a highest market share in Zones 4, 6 and 7.

## Bingo

- 8.18 Bingo is one of the oldest forms of gambling in the UK and has traditionally had a downmarket image limiting its appeal as a night out for the majority of the population. The typical bingo player has been perceived as lower income, female and from the older demographic. However, over the last decade, the market saw a rise in the number of younger and more affluent players and deregulation allowed clubs to offer bigger prizes.
- 8.19 Nevertheless, research by Mintel (2007) highlights that the industry has experienced a fall in revenues and admissions as a result of legislative changes such as the ban on smoking in public places and the rise of the online gambling. The recession has also hit the market and although operators have attempted to diversify their offer to halt the decline in participation rates, it would appear that this has merely slowed the decline and operators continue to struggle in tough market conditions.
- 8.20 There is one bingo hall located in Harlow town centre, a Mecca bingo, as illustrated on Plan 14. There are other bingo halls in Enfield, Stevenage and Waltham Cross. The results of the household survey indicate that just 5.5% of respondents play Bingo. Of these respondents, the majority (63%) identified the Mecca Bingo in Harlow as where they go most often whilst 22% use the Gala Bingo in Waltham Cross and 11% use the Gala Bingo in Enfield.

## Health & Fitness Clubs

- 8.21 According to Mintel's report on Health and Fitness Clubs – UK (May 2003), between 1998 and 2002 the value of the private health and fitness club market increased by 62% at current prices; in real terms the growth was still substantial at 49%. Mintel recognise changes in sporting fashions, which have shifted away from competitive sports towards those focused on personal health and fitness development.
- 8.22 It is now apparent that the health and fitness sector was struggling long before the onset of the economic downturn, although it is clear that the recession has compounded some of the problems faced by the industry such as falling membership rates. The Esporta chain was one of the most high profile casualties and was placed into administration in 2008. However, the Esporta business failed to sell and it is understood that it has been taken out of administration by its main creditor, who is trading the business until a buyer can be found. The number of new openings in the sector was static in 2008 and proposed openings have fallen sharply in 2009, with commentators predicting that many projects are likely to be shelved.
- 8.23 Nevertheless, there is evidence that value and budget operators are entering the health and fitness market and are actively looking to expand their businesses throughout the UK. This new breed of clubs aims to appeal to a wider market with subscriptions typically at £10 to £20 month. It is apparent that there will be sacrifices to the quality of the offer but that this offer is well suited to financially uncertain times.
- 8.24 Drawing on information supplied by the Council, we have reviewed the provision of both public and privately operated health and fitness clubs within the District, illustrated on Plan 14. Within Harlow town centre, the main health and fitness facility is the Esporta Health Centre at the Water Gardens. As well as a gym, the Esporta also has an indoor pool facility. Just outside the town centre, to the east of the Water Gardens, additional health & fitness facilities are provided within the Harlow Leisure Zone. The Leisure Zone is a brand new facility which includes a 25m swimming pool, a sports hall, indoor tennis hall and health spa amongst other sport and recreation facilities. Outside the town centre there are several other health and fitness facilities within the District which are illustrated on Plan 14.
- 8.25 Overall, we consider there is a good range of health and service facilities across the District. In terms of planning for further facilities, we recommend that health and fitness clubs should be directed towards town centres first, as part of more comprehensive mixed-use retail and residential schemes. We do not consider that it is helpful to assess the quantitative need for new health and fitness clubs, as this will largely be determined by market demand and the availability of suitable and viable sites.

## Leisure Expenditure Projections

- 8.26 The following summarises the overall growth in leisure expenditure to demonstrate the extent of growth in this sector. We have taken the base position and projected available expenditure per capita leading up to



2031 based on the population projections for the survey area, and assuming an ultra long term growth rate in available expenditure of 2.1% per annum for leisure goods from Experian Business Strategies Retail Planner Briefing Note 7.1 (August 2009).

- 8.27 The Experian E-marketer Report calculates annual consumer leisure expenditure<sup>20</sup> per person on leisure and recreation goods and services in 2008, based upon the demographic profile of the catchment area. Applying the per capita goods expenditure to the total population of the survey area, shows that there is currently £765m of available leisure expenditure, which is expected to rise to over £1 billion by 2031 (Appendix 6B).

**Table 8.3: Total Leisure Expenditure**

	2010 (£000)	2015 (£000)	2020 (£000)	2025 (£000)	2026 (£000)	2031 (£000)
Survey Area	765,347	882,560	1,019,950	1,175,738	1,208,433	1,349,707

Source: Experian Business Solutions, E-marketer, 2009

## The Evening Economy

- 8.28 The pub industry continues to suffer from the recession with a record number of pub closures across the UK as a direct consequence of a decline in both drinks sales and rental revenues. Other factors such as competition from the supermarkets, changes to licensing legislation and the smoking ban have further compounded the problems faced by many operators. Many of the large national pub chains have faced difficulties and there have been cases of administration. However, on the plus side, this has meant that smaller multiples have been able to acquire premium sites at bargain prices and value led brands such as JD Wetherspoon have achieved significant sales growth and continue to expand.
- 8.29 It is generally considered that the recession has brought mixed fortunes for the restaurant sector. The main casualties appear to have been from the more exclusive end of the market, as well as smaller companies with less established brands. Many companies owning multiple brands have announced stable results and are seeking to trade through the uncertainties by offering heavy promotions and discounts. The fall in property prices has also provided an opportunity for stronger niche operators to expand their brands as they have been able to negotiate substantial discounts on rents and landlords have been offering attractive incentive packages to help fill vacant units.
- 8.30 For families in particular, going out for a meal has become too expensive, and many have switched to staying at home with a takeaway which has increased sales for businesses such as Domino's. There has also been a surge in 'all-you-can-eat' style restaurants which are aimed at offering value for money for

<sup>20</sup> Leisure expenditure includes recreation and sporting services, cultural services, games of chance (gambling) and bars/restaurants.

lower income families. The Taybarn brand owned by Whitbread is currently trading very strongly and the brand is pursuing aggressive openings.

- 8.31 The survey results indicate that Hertford, Harlow and Bishop's Stortford are the most popular destinations for residents who like to eat out, each drawing between 16-17% residents from the survey area. This highlights that Harlow is already performing a role in terms of its restaurant offer although it is apparent from our health check that Harlow's quality restaurant offer is relatively limited to those located in and around the Water Gardens. There is therefore a clear opportunity to enhance the existing offer in the town centre and substantiate Harlow as a quality evening economy destination.

#### *Restaurant/Café Expenditure*

- 8.32 According to Experian Business Solutions (2006) the average person spends £1,106 per annum in restaurants/cafes. Experian also estimate that people's average likely spend on leisure goods such as eating out increases by 2.1% each year. Currently the total spend available for restaurants/cafés in the Harlow survey area is £444m, increasing to £512m in 2015, to £592m in 2020, to £682m in 2025, £701 in 2026 and £783m in 2031 as identified in Table 8.4 and Appendix 6B. This is a much higher level of available expenditure than that previously identified reflecting the strong growth in this sector.

**Table 8.4: Restaurant /Café Expenditure Forecasts**

	2010 (£000)	2015 (£000)	2020 (£000)	2025 (£000)	2026 (£000)	2031 (£000)
Survey Area	443,907	511,874	591,543	681,876	700,834	782,763

Source: Experian Business Solutions, E-marketer, 2009

- 8.33 Our assessment highlights sufficient growth in the District to sustain a circa 33% growth in the restaurant/café sector by 2020. This is a strong level of growth and we recommend that this is directed towards town centres first in accordance with national planning policy.
- 8.34 Research indicates that mixed-use town centre schemes can comprise a significant quantum of A3, A4 and A5 floorspace to complement the wider retail, office and residential offer. Given best practice, the growing trend towards mixed-use schemes discussed and evident strong growth in expenditure in this sector, it is usual to assume that comparison goods retail schemes will comprise circa 15% of leisure floorspace (i.e. Use Class A3/4/5 eating and drinking). Whilst this is a relatively crude assumption, it provides an indication of the level of café, bar and restaurant floorspace which could be provided.

#### *Theatres and Cultural Venues*

- 8.35 The main theatre in the District is the Playhouse Theatre, located to the south of the Harvey Centre in Harlow town centre. The theatre originally opened in 1971, although it was closed for a brief period

between 1995 and 1996. It has been open and operated by the Council since 1996. The venue offers a 420-seater auditorium which hosts a range of traditional theatre, ballet and contemporary dance, classical music events, opera, comedy and pantomime shows. There is also a smaller studio theatre within the complex.

- 8.36 Additional theatre provision in the District includes, Victoria Hall is located on Bury Road in Old Harlow which seats just over 100 people. The venue hosts a variety of performances including plays, dance, stand-up comedy and musicals amongst others.

## Offices

- 8.37 The Stage 1 Employment Utilisation Report (EUR) undertaken by GVA Grimley in 2008 sets out a detailed overview of the office market in Harlow. Consistent with the findings of the previous retail study, the District is not regarded as a significant office location, reflected by the relative lack of quality office accommodation available within the area. The District's most prominent office locations are the town centre, Edinburgh Way and the Pinnacles Estate, with smaller pockets of office accommodation near Harlow train station.
- 8.38 It is apparent from our site visit that there is a reasonable supply of office accommodation within the town centre, particularly in town centre north, however much of this appears dated and would benefit from refurbishment/redevelopment. This is consistent with the findings of the 2008 EUR which concludes:

*'Given the relatively poor quality of some town centre offices in Harlow we recommend integrating the redevelopment of vacant and underutilised employment sites into the overall town centre improvements. This will provide high quality office space which is well served by amenities and public transport.'*

- 8.39 Consistent with the EUR and the previous Retail Study, we recommend a sequential approach to new development which should favour opportunities within Harlow town centre alongside mixed-use developments and improvements in accessibility in order to establish an enhanced office role in the town centre with an aim to attract further inward investment.

## Summary

- Our assessment of the commercial leisure sector in Harlow indicates a reasonable range of commercial leisure facilities. Within and around Harlow town centre there a bingo, bowling centre, two health and fitness facilities and a theatre, which is a good level of provision for a centre of its size. There is some provision of quality cafes, restaurants and bars, although there is scope for further provision to enhance the evening offer.

- Our cinema modelling indicates that there could be scope for 23 new cinema screens in the study area by 2015. There is therefore reasonable potential for the promotion of a new cinema facility within the town centre which would contribute towards meeting the identified need for in the survey area over the plan period.
- We estimate that there is strong growth in leisure expenditure, which indicates that there is the potential to provide additional leisure facilities in the District and to support a more vibrant evening economy in Harlow town centre.
- We have not undertaken a detailed office needs assessment as part of this study however our broad overview of previous work indicates that Harlow is not regarded as a significant office location, reflected by the relative lack of quality office accommodation available within the area. We would recommend that any new provision should be directed towards Harlow town centre in the first instance, in accordance with PPS4 and the sequential approach.

## 9. KEY FINDINGS & RECOMMENDATIONS

- 9.1 Drawing on our qualitative and quantitative analysis, this section considers the key findings and policy recommendations moving forwards over the plan period to 2031.

### Quantitative Capacity Forecasts

- 9.2 Based on the performance of existing provision and taking into account projected population and expenditure growth and identified commitments, we have identified an oversupply of convenience goods floorspace over the short-term (to 2015). However by 2020 our forecasts indicate some capacity arising in the region of 357 sqm net, increasing to 1,759 sqm net by 2025, 1,922 sqm net by 2026 and 2,110 sqm net by 2031.
- 9.3 In qualitative terms however, we believe there is a case to support a new foodstore within the town centre to anchor TCN and bring forward the much needed regeneration of the area. There is a strong justification and the support of PPS4 for the redistribution of expenditure currently drawn to the out-of-centre foodstores, notably the Sainsbury's, Allende Avenue, back into the town centre. Given the likelihood that the Asda is trading better than suggested by the survey results, we do not consider that the provision of a further, well integrated new foodstore within the town centre would be likely to materially affect the Asda store. We consider that a new foodstore in the centre could provide an important anchor to the TCN area.
- 9.4 In terms of comparison goods, our baseline assessment identifies global capacity to support 4,724 sqm net by 2015, increasing to 22,004 sqm net by 2020, 42,451 sqm net by 2025, 46,798 sqm net by 2026 and 78,972 sqm net by 2031. In the event that the extension to the Harvey Centre is delivered, this will absorb capacity in the short-term (to 2015), however by virtue of population and expenditure growth, we project that there will be global capacity in the region of 14,590 sqm net by 2020, increasing to 35,668 sqm by 2025, 40,135 by 2026 and 72,374 by 2031.
- 9.5 Depending on the level of new housing growth that will be planned for over the period to 2031, there is potential for further capacity to be generated over and above our baseline forecasts. We have estimated capacity that could hypothetically be generated under three different housing growth scenarios ranging from 5,000 to 16,000 new dwellings. This analysis identifies potential capacity for between 2,103 to 6,730 sqm net convenience goods floorspace (assuming a major store operator) and 6,840 to 21,888 sqm net comparison goods floorspace, generated solely by new housing development at 2020. In parallel with the development strategy for housing growth, the Council will have to consider the need for additional retail provision either through the expansion of existing centres or the designation of new centres.
- 9.6 There is evident global capacity in quantitative terms to support additional retail floorspace in the District. PPS4 (Policy EC5.1) requires LPAs to identify an appropriate range of sites to accommodate the identified

need and encourages LPAs to proactively plan to promote their town centres, advocating the town centre's first sequential approach. There are clear opportunities for identified capacity to be delivered within Harlow town centre and this is discussed in more detail below.

## Harlow Town Centre

### i) Sub-regional Positioning

- 9.7 In terms of the sub-regional context, the household survey has identified Bishop's Stortford, Greater Brookfield, Welwyn Garden City, Waltham Cross, Lakeside Shopping Centre, Enfield, Central London and Chelmsford as Harlow's key competing centres. Our review of the key performance indicators highlights that Harlow is performing relatively competitively against these centres. Whilst it appears that Chelmsford, Central London and Lakeside are generally performing better than Harlow against most of the key indicators, the results of the household survey demonstrates that these centres' actually have very little influence over shopping patterns within the District's zones (Zones 1 & 2).
- 9.8 In contrast, the results of the household survey indicate that Harlow town centre is the most dominant centre in the survey area with a 24% comparison goods market share. Harlow's retail warehouse provision, concentrated along Edinburgh Way, is also performing strongly attracting 20% of comparison goods expenditure from across the survey area. On the basis of market share penetration, Bishop's Stortford would appear to be Harlow's main competing centre with an 11% comparison goods market share across the survey area. However the centre's core catchment is clearly defined (Zones 4, 6 and 7) and there is actually limited overlap with Harlow's own catchment.
- 9.9 Brookfield, Welwyn Garden City, and to a lesser extent Waltham Cross and Enfield, exert some influence over the District although market share is generally diluted across the breadth of survey area. However, additional development and growth in these centres has potential to increase their overall influence across the survey area and Harlow District. The development of Stratford City also poses a threat and it will therefore be important for Harlow to build on its strengths to ensure it maintains and where possible, enhances its market share, to offset any planned growth elsewhere in the sub-region. A 'do-nothing' scenario in Harlow will result in increased leakage of trade and loss of market share.
- 9.10 The Council should monitor Harlow's market share over the plan period which will provide a clear indication of its on-going performance and detect any apparent growth or decline.

### ii) Current Performance

- 9.11 Harlow is generally considered to be a fairly healthy town centre which is performing reasonably in respect of the PPS4 health check indicators set out in Appendix 2A. However, it should be recognised that some parts of the centre are clearly performing better than others and there is clear scope and opportunity for

improvement in the town centre. In general, the centre currently offers a reasonable range of retail and service uses including above average comparison shopping provision, although this is generally clothing orientated and largely focused towards the value end of the market. Whilst the centre has experienced a marginal downturn e.g. in terms of Prime A rents and retailer requirements; this is consistent with national trends and the recent recession and not specifically isolated to Harlow.

- 9.12 The centre benefits from a good range of multiple and independent retailers and overall representation from multiple retailers has notably increased since the previous study. Reflecting the appeal of the more modern, attractive shopping area provided by the Water Gardens, key multiple retailers are generally concentrated towards the south of the town centre. The retail emphasis of the town centre has evidently shifted southwards and increased disparities with the north of the centre which is characterised by a high level of vacancies and poorer quality environment. This area would clearly benefit from regeneration and offers clear opportunities to extend and enhance the centre's current offer. The redevelopment of town centre north should therefore remain a key priority for the Council to seek to deliver this over the plan period. Our recommendations in respect of this are set out in more detail later.
- 9.13 Consistent with the previous retail study, there is still some uncertainty over the performance of the town centre's foodstores (e.g. Asda at the Water Gardens; Tesco Metro, Harvey Centre; and M&S Simply Food, Broad Walk Mall). The results of the household survey suggest that the foodstores are performing below their respective company averages. However observations from our site visit and direct discussions with Asda suggest this may not be the case, indicating that our household survey may have underestimated the performance of these stores.
- 9.14 Given the difficulty of assessing the turnover of individual stores, we consider it is appropriate to focus on the global capacity projections, as a starting point for adopting a sequential approach, rather than seeking to ascribe capacity to specific stores/locations.

### iii) Town Centre Boundary & Frontages

- 9.15 PPS4 states that LPAs should define the extent of their centres and the primary shopping area and consider distinguishing between realistically defined primary and secondary shopping frontages in designated centres accompanied by policies that clearly set out which uses will be permitted in such locations.
- 9.16 The existing adopted Local Plan proposals map defines primary and secondary shopping frontages in Harlow town centre with a provision under Policy RTCS12 to extend the Primary Shopping Frontage to include the Town Centre South development (The Water Gardens) upon opening. The inclusion of the Water Gardens within the Primary Frontage is considered appropriate and consistent with the definition set out in PPS4.

- 9.17 PPS4 states that primary frontages are likely to include a high proportion of retail uses whilst secondary frontages provide greater opportunity for a diversity of uses. The existing frontages, as defined on the adopted proposals map, are considered consistent with PPS4. However, there may be some merit in re-designating Little Walk to secondary frontage to provide a greater degree of flexibility that may help enable some of the vacant units to become reoccupied.
- 9.18 The adopted Local Plan does not currently define the extent of the Primary Shopping Area (PSA). PPS4 defines the PSA as the 'area where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage)'. To ensure consistency with PPS4, the Council should clearly define the PSA to encompass the primary and secondary shopping frontages. It is important to define the PSA to provide clarification to assist the classification of 'edge-of-centre' and 'out-of-centre' sites under the provisions set out in Appendix B of PPS4.
- 9.19 In terms of the identified opportunities for the redevelopment of Town Centre North (discussed in more detail below), the Council should consider identifying the potential for a planned extension to the PSA within its policy framework. The future PSA and frontages in the town centre would be most appropriately defined within a town centre Area Action Plan, which is discussed in more detail below.

#### iv) Eating / Drinking / Entertainment

- 9.20 Our assessment has demonstrated that there is currently a reasonable range of different leisure activities on offer in the town centre. These leisure uses are broadly distributed across the centre although there is a clear focus at the Water Gardens where there are purpose-built restaurant units with provision for outdoor eating overlooking the landscaped gardens.
- 9.21 It is evident from the household survey that the local catchment (Zones 1, 2, 3 and 5) largely choose Harlow town centre for visiting restaurants and eating out. This indicates that the centre is already performing a role in terms of its restaurant offer although, given that there is currently a rather limited choice of restaurants, there is a clear opportunity to enhance the existing offer.
- 9.22 The Council should adopt a clear policy approach to protect and encourage the continuing development of a quality restaurant offer alongside other appropriate, complementary evening uses and adopt a general resistance to A5 fast food take away uses which could otherwise undermine the enhancement of the area. The town centre should be the focus for the centre's evening economy and should appeal to a wide range of age and social groups.
- 9.23 The town centre currently lacks a cinema facility, following the closure of the Odeon cinema on Westgate in 2005. The out-of-centre Cineworld at the Queensgate Centre on Edinburgh Road, is the only cinema in the District and, not surprisingly, is the most popular cinema achieving a market share of 50%. The household survey indicates that a reasonable proportion of residents from within the survey area also visit



cinemas in Bishop's Stortford, Enfield and Stevenage. There is evidently scope for new cinema provision to meet the identified need for additional cinema screens over the plan period. A new quality cinema within the town centre would provide a key leisure anchor that would support plans to substantiate Harlow as a quality evening economy destination.

## v) Development Opportunities

- 9.24 In allocating sites and assessing proposed development, PPS4 (Policy EC5) requires LPAs to assess the need for development; identify an appropriate scale; apply the sequential approach; assess the impact on existing centres; and consider the degree to which other considerations such as physical regeneration, employment opportunities, investment in an area or social inclusion may be material to the choice of appropriate locations for development.
- 9.25 Our quantitative assessment identifies capacity to support additional retail floorspace in the District over the plan period. In accordance with the sequential approach, preference should be given to locations in existing centres in the first instance before considering edge-of-centre sites and then out-of-centre sites. On this basis, identified capacity should be directed in and on the edge of Harlow town centre. We have not carried out a detailed assessment of the town centre as part of this update, however there are various known sites in and around the town centre which have been identified through existing Local Plan policy which could be appropriately brought forward through the LDF.
- 9.26 It is evident from our health check analysis, as highlighted above, that there is a particularly strong qualitative need for the redevelopment of Town Centre North in order to inject life back into the area and prevent further decline. This area represents a key opportunity to improve both the physical quality and layout of this part of the centre as well as enhance the overall choice and quality of retail and other related uses that the town centre has to offer which is considered necessary if the centre is to compete effectively with other centres in the wider sub-region. In particular, this area is recognised for its potential to enhance the range of food and drink, leisure and entertainment uses to strengthen the evening economy. This is discussed in more detail below.
- 9.27 As part of our assessment we have tested the possible uplift in the town centre's market share that could be achieved through new development and investment in Harlow town centre and a step change in its quality retail offer (i.e. at Town Centre North). Our analysis demonstrates that an increase in market share by just four percentage points would result in a net additional floorspace capacity of 22,300 sqm net at 2020, compared to 11,747 sqm net based on the constant market share baseline scenario. This is forecast to increase to 35,409 sqm net by 2025, compared to the 22,822 sqm net baseline. This is based on a broad assumption and would obviously depend on a variety of other factors such as the quality of the retail anchor and overall demand.

- 9.28 Nevertheless, the Council should identify Town Centre North as either a strategic allocation in the Core Strategy or an allocation within an APP, linked to criteria based policies that would ensure any future scheme benefits the town centre as a whole.
- 9.29 It is beyond the scope of this study to consider the phasing and delivery aspects of development opportunities in the town centre. It will however be necessary for the Council to establish a degree of certainty over deliverability, scale and phasing of future development and to develop an appropriate strategy that will enhance the centre's current offer and secure a seamless extension to existing retail areas.
- 9.30 In light of the clear opportunities for significant change, the Council should be proactive in developing a clear vision and strategy for the town centre through an Area Action Plan which will ensure that the strategy will be properly tested. This process should involve more detailed analysis of the retail line up compared to the centre's demographic catchment and identify retailers which are undersized within the town centre, or not currently represented. It should also consider how future developments might be implemented and ensure proposals fulfil the relevant policy tests in PPS4.
- 9.31 The production of an AAP should increase market interest and provide a stimulus to encourage the development of key opportunity areas, such as town centre north, within an appropriate policy framework. A town centre AAP would also be an appropriate policy document to define the town centre boundary, PSA and frontages.

## **Next Steps**

- 9.32 In accordance with national policy and the PPS4 practice guidance the Council should build on the evidence set out in this report, in respect of need and capacity, and develop a clear policy framework to support and actively promote new development. Given the opportunities for Harlow town centre to enhance and extend its retail offer, we consider it a crucial next step for the Council to prepare a focussed AAP for the town centre to ensure that it is able to serve the needs of its catchment, to increase its market share and compete effectively with other centres in the wider sub-region.

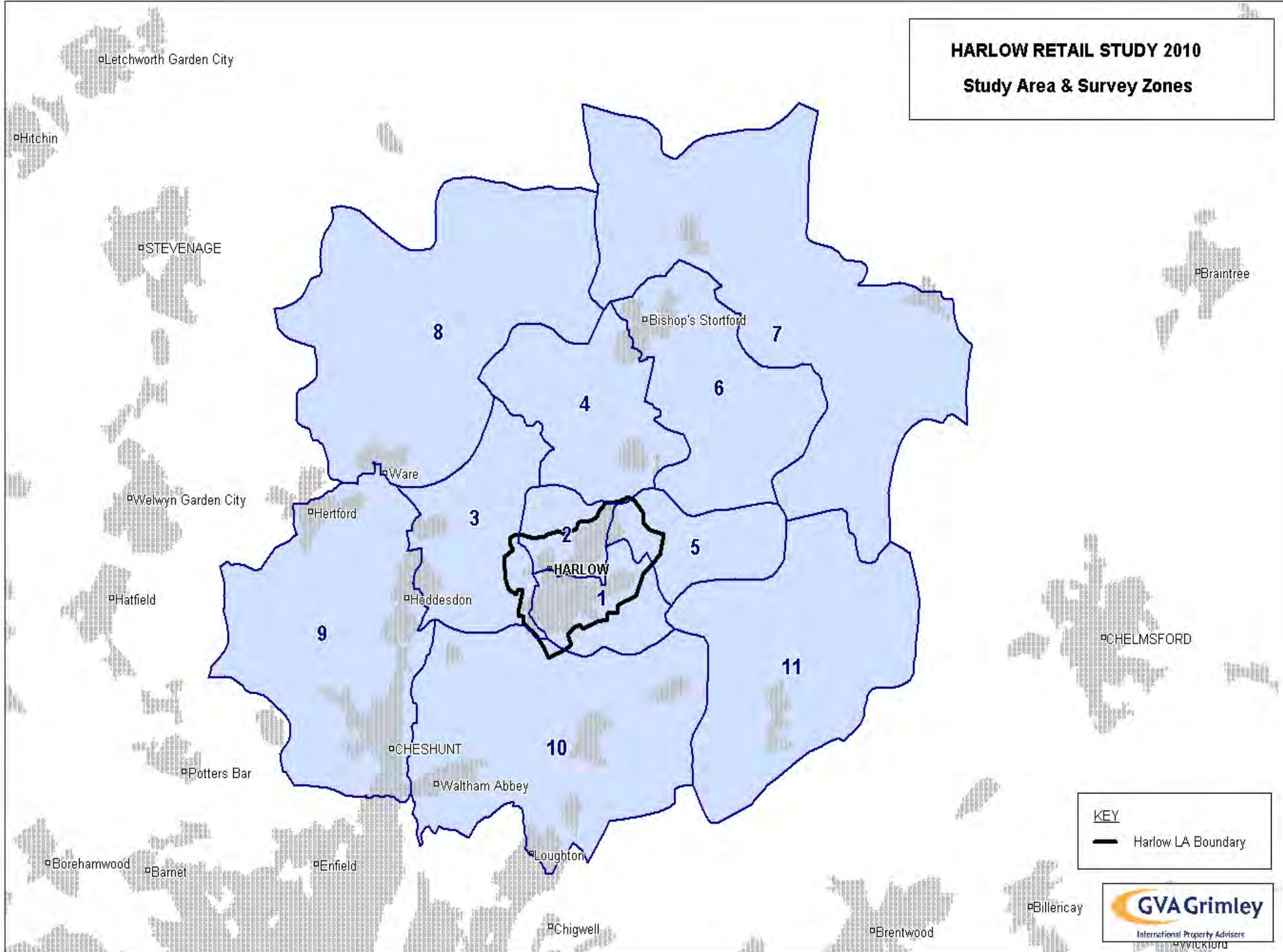
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**PLAN 1**

**HARLOW HOUSEHOLD TELEPHONE SURVEY AREA**

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**HARLOW RETAIL STUDY 2010**  
**Study Area & Survey Zones**



**KEY**  
 — Harlow LA Boundary



Map reproduced from GBPro 200 GB (2005 edition). © Colins Bartholomew Ltd (2005).

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**PLAN 2**

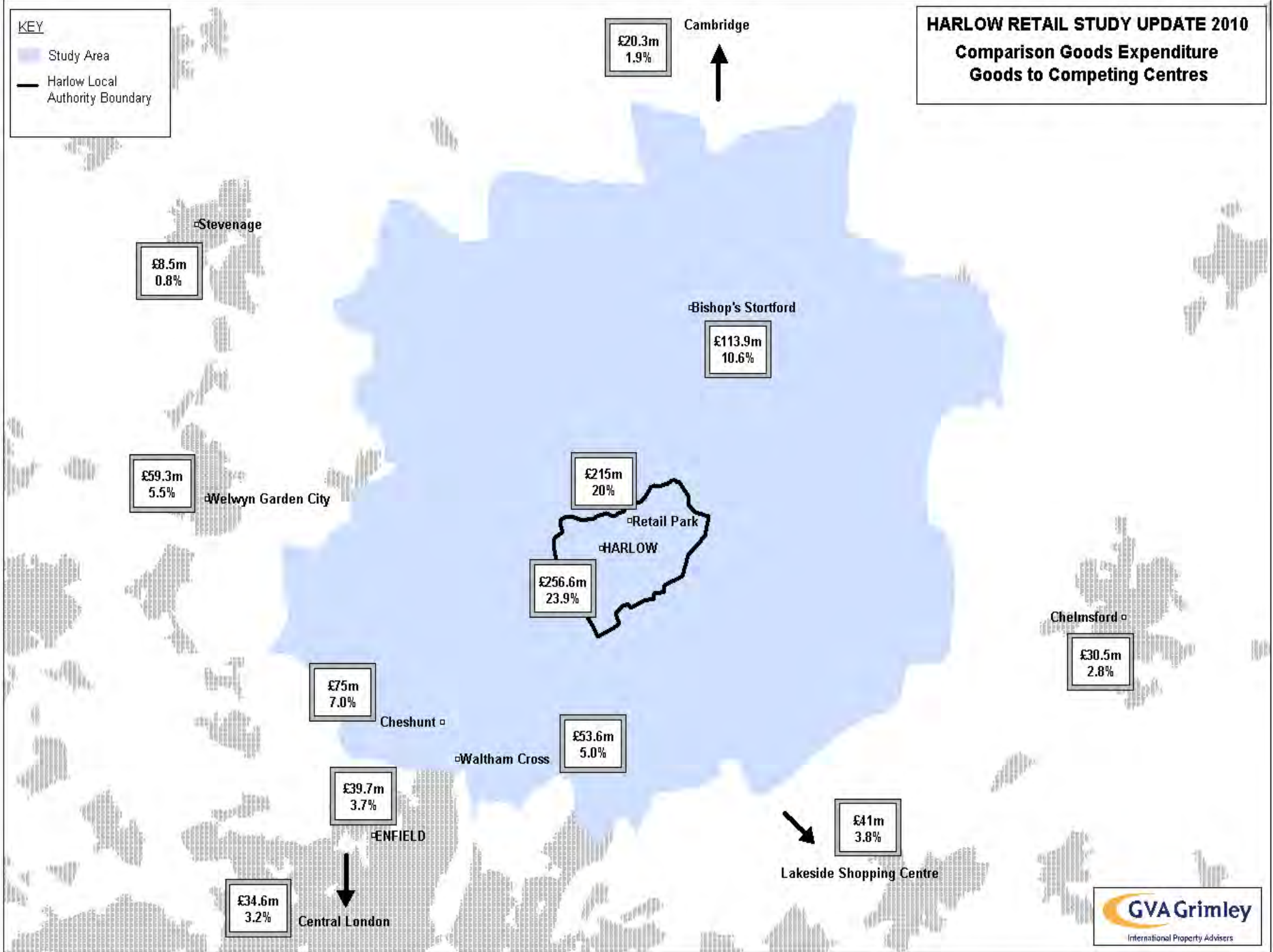
**COMPARISON GOODS EXPENDITURE FLOWS TO COMPETING CENTRES**

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**KEY**

- Study Area
- Harlow Local Authority Boundary

**HARLOW RETAIL STUDY UPDATE 2010**  
**Comparison Goods Expenditure**  
**Goods to Competing Centres**



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**PLAN 3**

**HARLOW COMPARISON GOODS MARKET SHARE**

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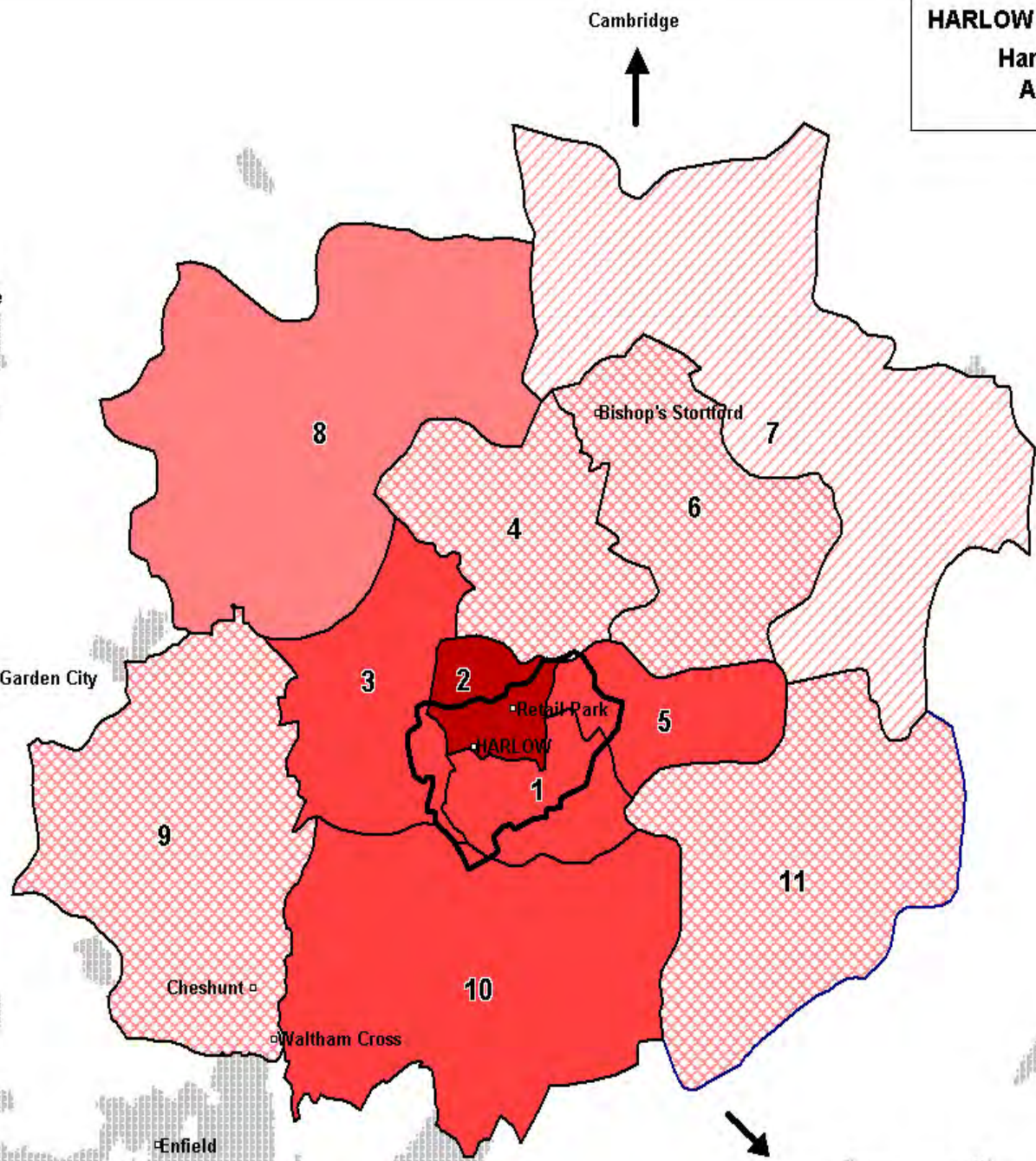
**KEY**

Comparison Goods  
Market Share (%)

- 0.1 - 4.9
- 5 - 9.9
- 10 - 19.9
- 20 - 29.9
- 30 - 39.9
- 40 - 55

— Harlow Local  
Authority Boundary

**HARLOW RETAIL STUDY UPDATE 2010**  
**Harlow Comparison Goods**  
**Allocation Market Share**





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**PLAN 4**

**HARLOW RETAIL WAREHOUSING COMPARISON GOODS MARKET SHARE**

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**KEY**

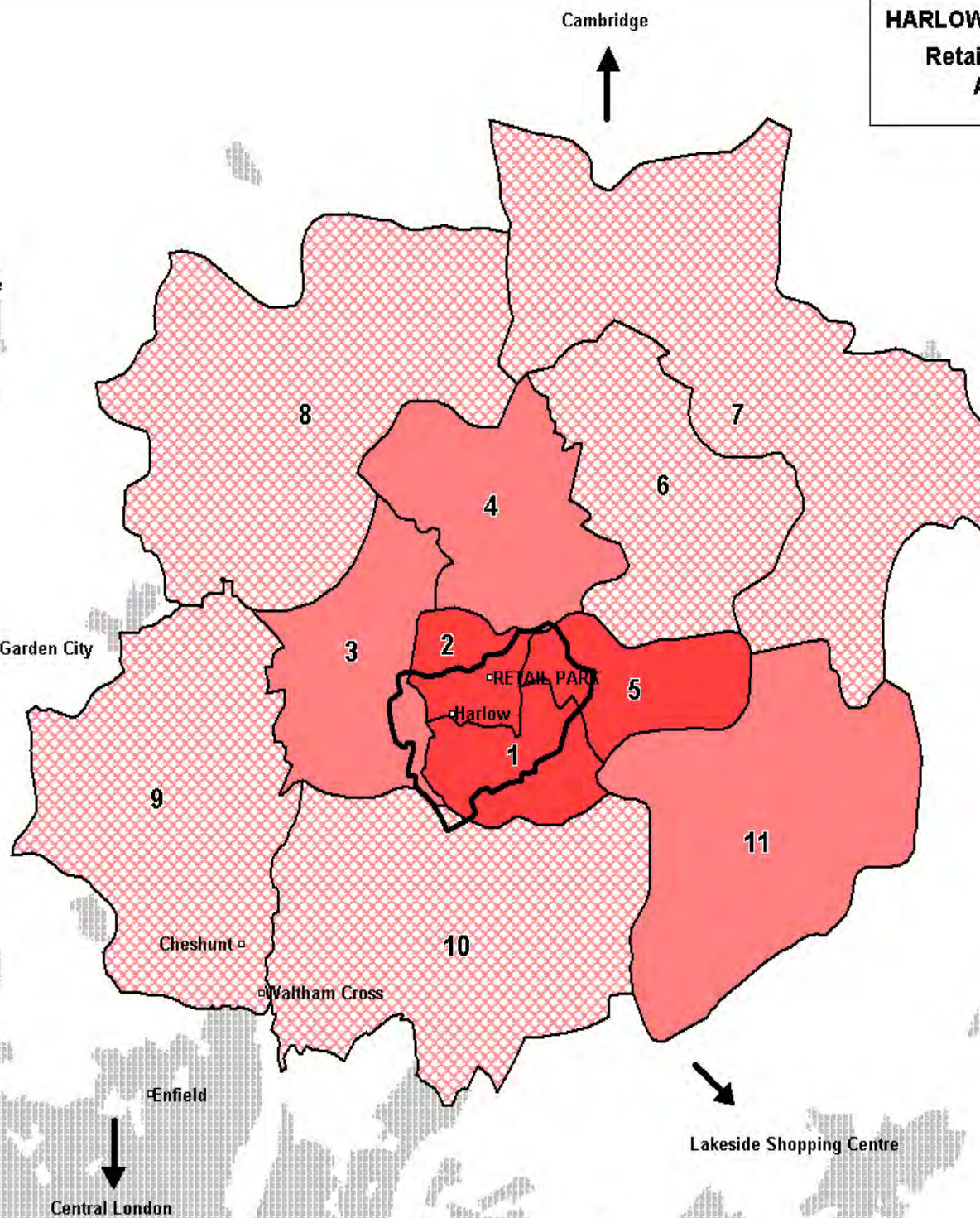
Comparison Goods  
Market Share (%)

- 0.1 - 4.9
- 5 - 9.9
- 10 - 19.9
- 20 - 29.9
- 30 - 39.9
- 40 - 49.9

— Harlow Local  
Authority Boundary

**HARLOW RETAIL STUDY UPDATE 2010**

**Retail Parks Comparison Goods  
Allocation Market Share**



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**PLAN 5**

**BISHOP'S STORTFORD COMPARISON GOODS MARKET SHARE**

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**KEY**

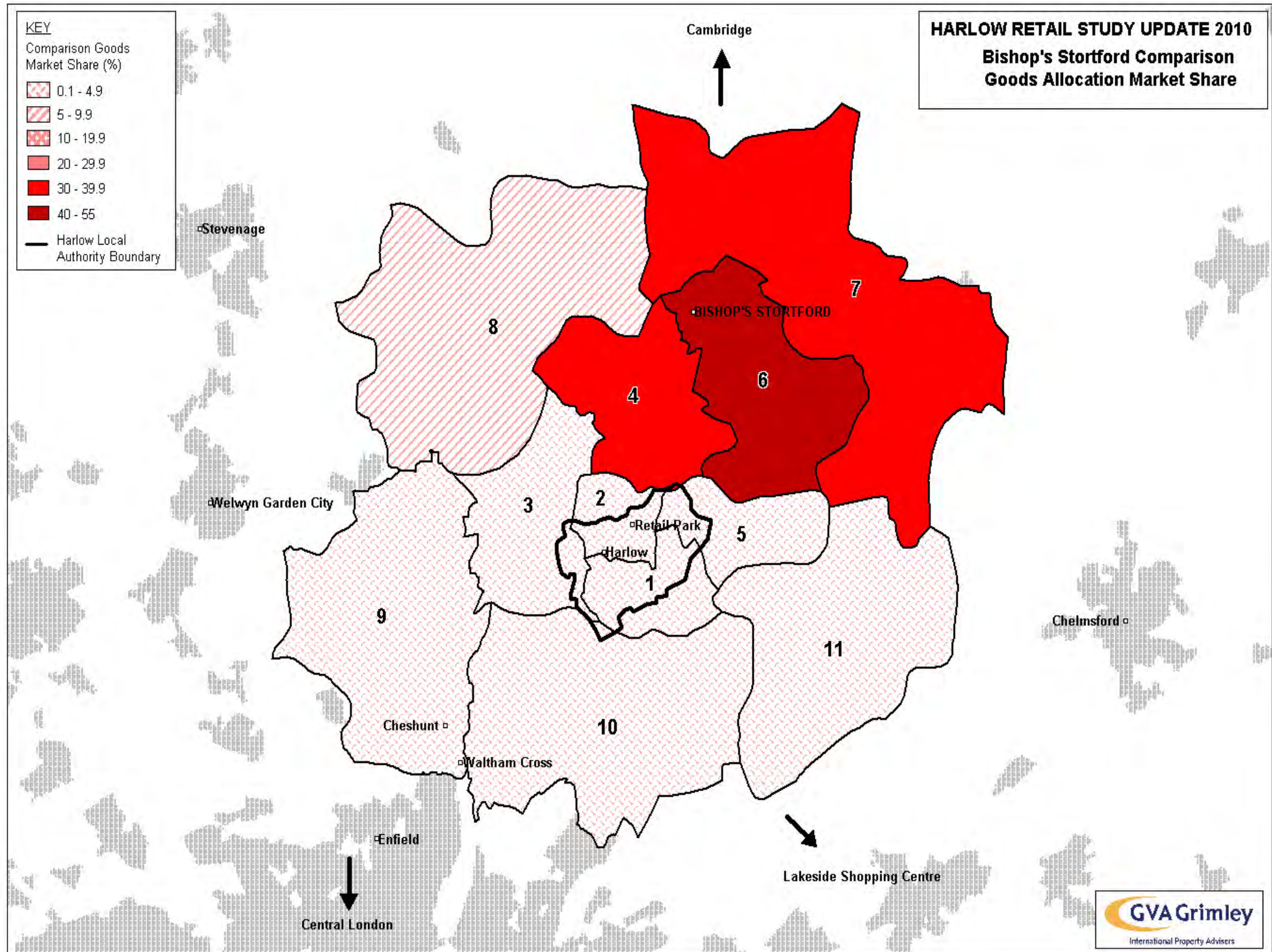
Comparison Goods  
Market Share (%)

-  0.1 - 4.9
-  5 - 9.9
-  10 - 19.9
-  20 - 29.9
-  30 - 39.9
-  40 - 55

— Harlow Local  
Authority Boundary

**HARLOW RETAIL STUDY UPDATE 2010**

**Bishop's Stortford Comparison  
Goods Allocation Market Share**



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**PLAN 6**

**BROOKFIELD COMPARISON GOODS MARKET SHARE**

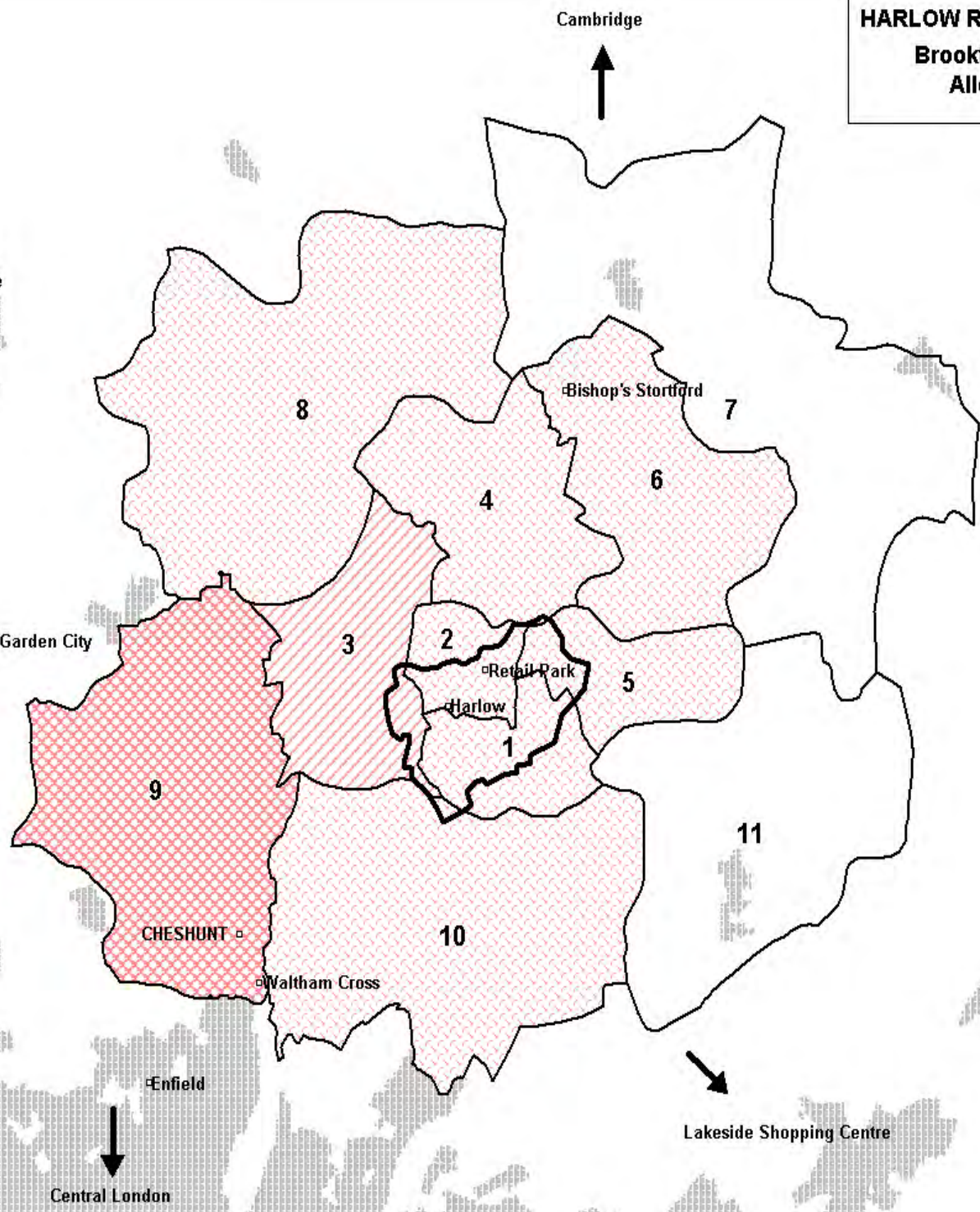
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**KEY**  
 Comparison Goods  
 Market Share (%)

- 0.1 - 4.9
- 5 - 9.9
- 10 - 19.9
- 20 - 29.9
- 30 - 39.9
- 40 - 55

— Harlow Local  
 Authority Boundary

**HARLOW RETAIL STUDY UPDATE 2010**  
**Brookfield Comparison Goods**  
**Allocation Market Share**



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**PLAN 7**

**WELWYN GARDEN CITY COMPARISON GOODS MARKET SHARE**

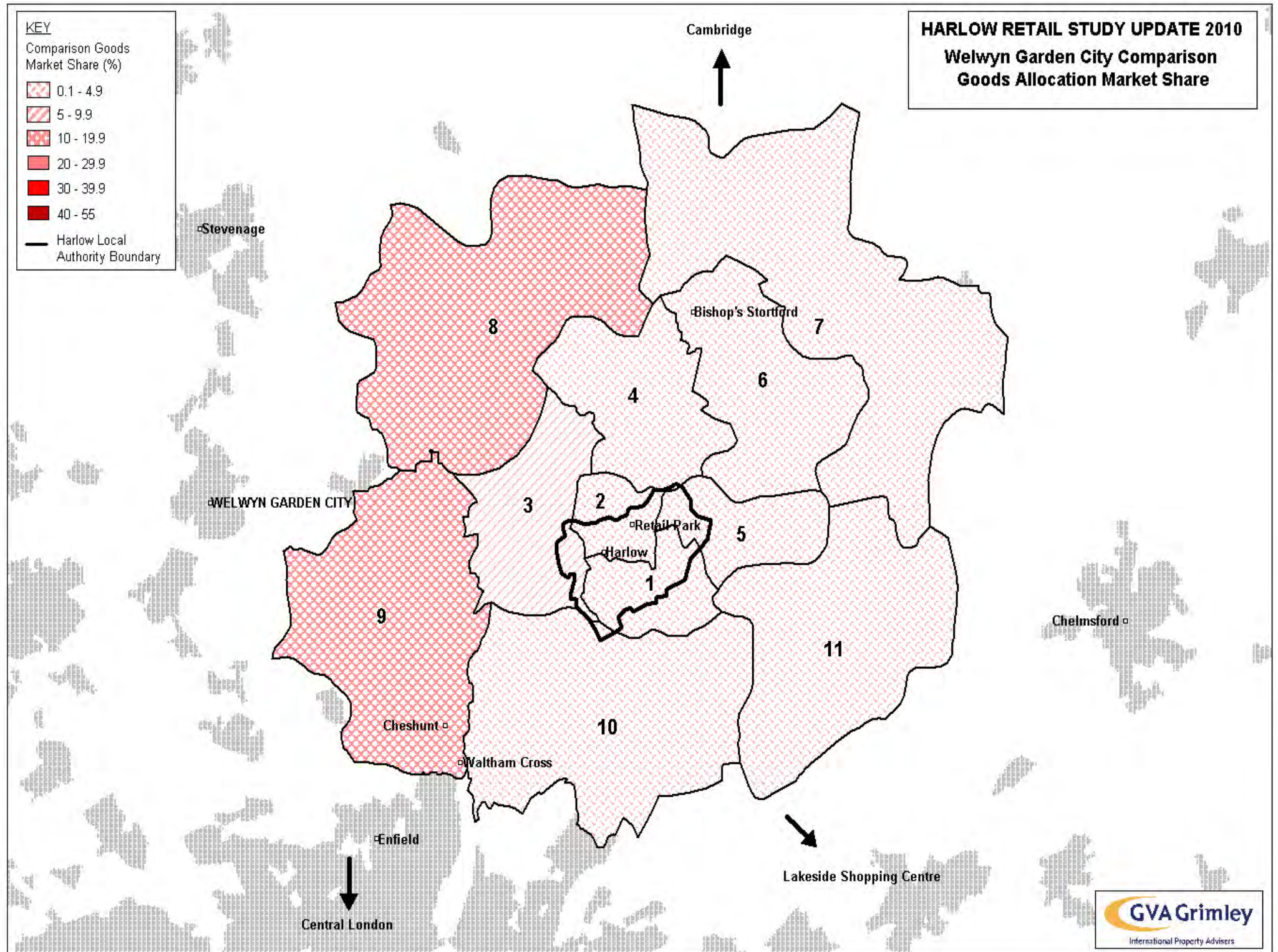
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**KEY**  
 Comparison Goods Market Share (%)

- 0.1 - 4.9
- 5 - 9.9
- 10 - 19.9
- 20 - 29.9
- 30 - 39.9
- 40 - 55

— Harlow Local Authority Boundary

**HARLOW RETAIL STUDY UPDATE 2010**  
**Welwyn Garden City Comparison Goods Allocation Market Share**



Map reproduced from GBPro 200 GB (2005 edition). © Collins Bartholomew Ltd (2005).



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**PLAN 8**

**WALTHAM CROSS COMPARISON GOODS MARKET SHARE**

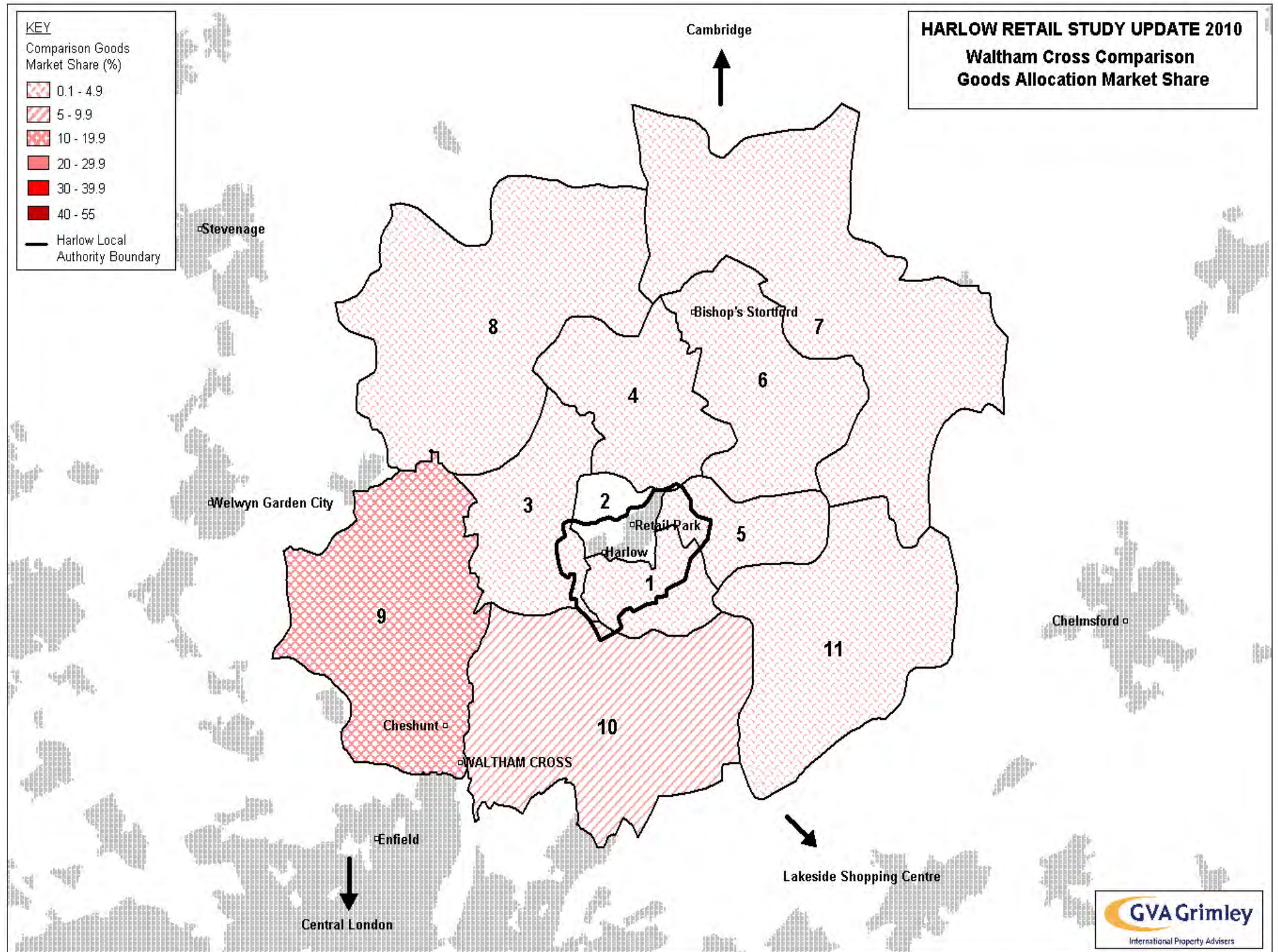
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**KEY**  
 Comparison Goods  
 Market Share (%)

- 0.1 - 4.9
- 5 - 9.9
- 10 - 19.9
- 20 - 29.9
- 30 - 39.9
- 40 - 55

— Harlow Local  
 Authority Boundary

**HARLOW RETAIL STUDY UPDATE 2010**  
**Waltham Cross Comparison**  
**Goods Allocation Market Share**



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**PLAN 9**

**LAKESIDE COMPARISON GOODS MARKET SHARE**

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**KEY**  
 Comparison Goods  
 Market Share (%)

- 0.1 - 4.9
- 5 - 9.9
- 10 - 19.9
- 20 - 29.9
- 30 - 39.9
- 40 - 55

— Harlow Local  
 Authority Boundary

**HARLOW RETAIL STUDY UPDATE 2010**  
**Lakeside Shopping Centre Comparison**  
**Goods Allocation Market Share**



Cambridge  
 ↑

Stevenage

Bishop's Stortford

Welwyn Garden City

Retail Park  
 Harlow

Chelmsford

Cheshunt

Waltham Cross

Enfield

Central London  
 ↓

↓  
 LAKESIDE SHOPPING CENTRE



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**PLAN 10**

**ENFIELD COMPARISON GOODS MARKET SHARE**

---

**KEY**

Comparison Goods  
Market Share (%)

-  0.1 - 4.9
-  5 - 9.9
-  10 - 19.9
-  20 - 29.9
-  30 - 39.9
-  40 - 55

— Harlow Local  
Authority Boundary

**HARLOW RETAIL STUDY UPDATE 2010**  
**Enfield Comparison Goods**  
**Allocation Market Share**



Map reproduced from GBPro 200 GB (2005 edition). © Colins Bartholomew Ltd (2005).

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**PLAN 11**

**CENTRAL LONDON COMPARISON GOODS MARKET SHARE**

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**HARLOW RETAIL STUDY UPDATE 2010**  
**Central London Comparison**  
**Goods Allocation Market Share**

**KEY**  
 Comparison Goods  
 Market Share (%)

- 0.1 - 4.9
- 5 - 9.9
- 10 - 19.9
- 20 - 29.9
- 30 - 39.9
- 40 - 55

— Harlow Local  
 Authority Boundary



Map reproduced from GBPro 200 GB (2005 edition). © Colins Bartholomew Ltd (2005).



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**PLAN 12**

**CHELMSFORD COMPARISON GOODS MARKET SHARE**

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**KEY**

Comparison Goods  
Market Share (%)

0.1 - 4.9

5 - 9.9

10 - 19.9

20 - 29.9

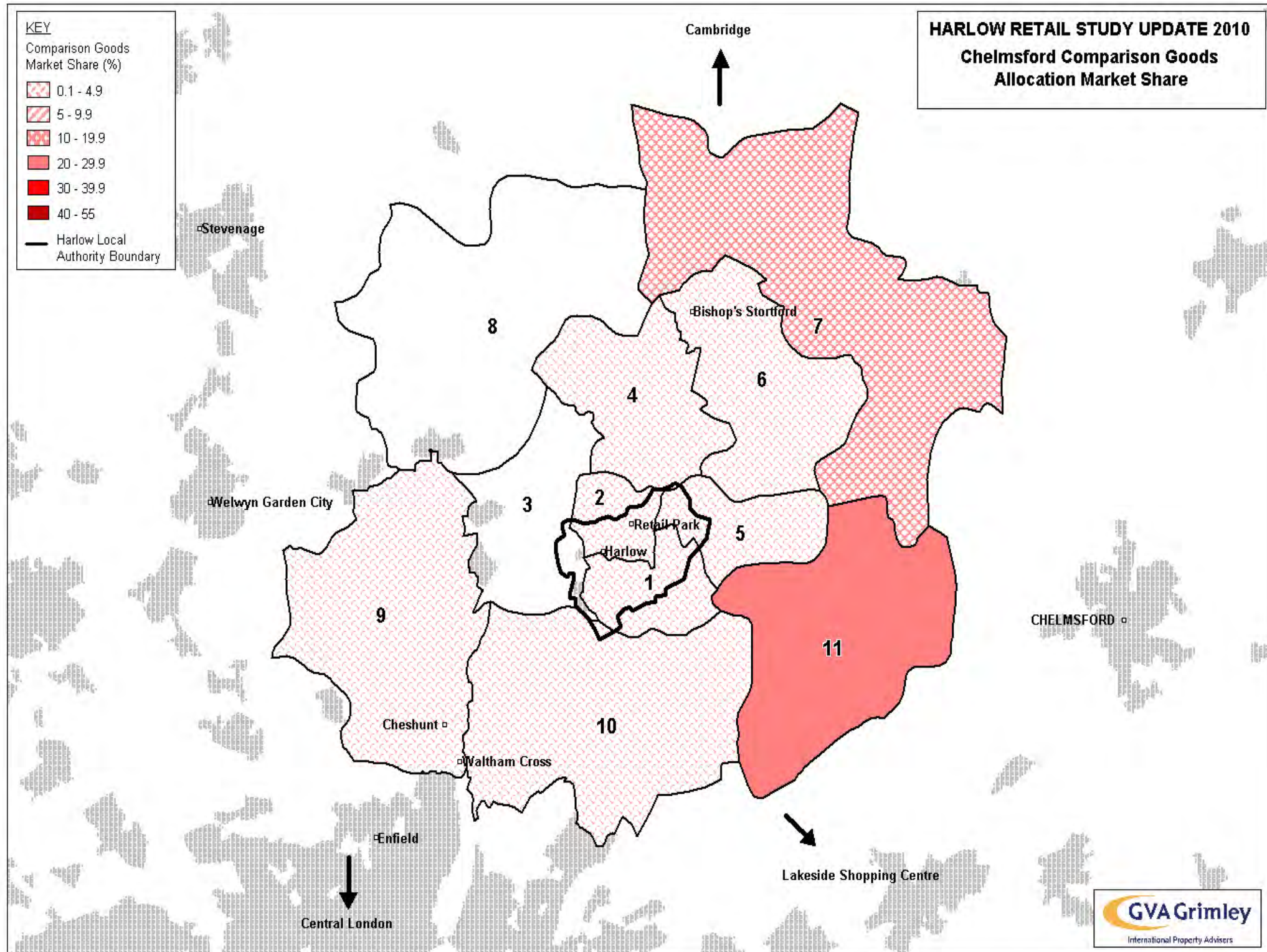
30 - 39.9

40 - 55

— Harlow Local  
Authority Boundary

**HARLOW RETAIL STUDY UPDATE 2010**

**Chelmsford Comparison Goods  
Allocation Market Share**



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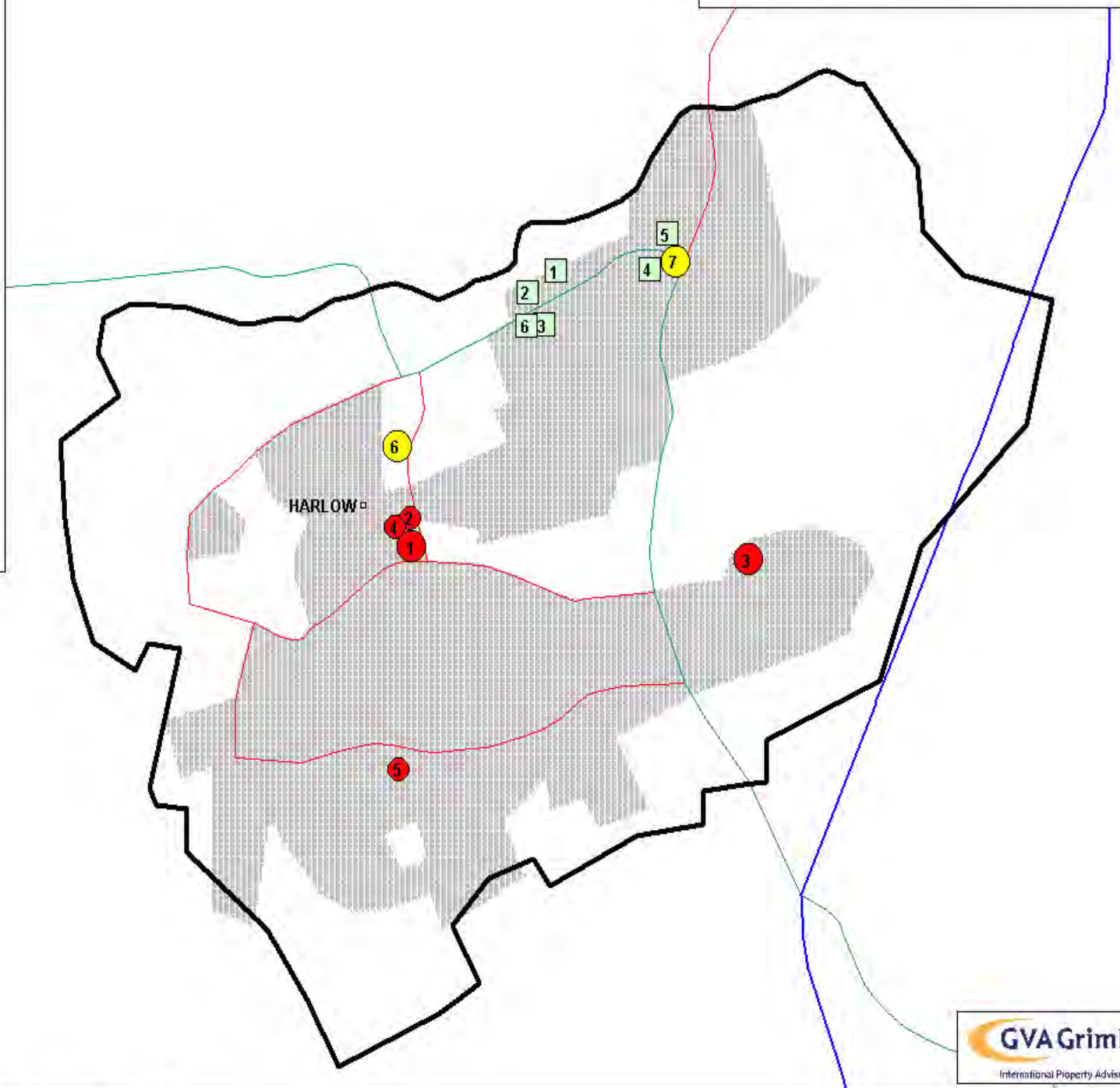
**PLAN 13**

**HARLOW RETAIL WAREHOUSING AND FOODSTORE PROVISION**

---

**HARLOW RETAIL STUDY UPDATE 2010**  
**Harlow Foodstores & Retail Warehousing**

- KEY**
- Harlow Local Authority Boundary
  - In-Centre foodstores
    - 1 Asda, Watergardens, Southgate
    - 2 M&S, 36 Broad Walk
    - 3 Tesco, Church Langley Centre
    - 4 Tesco Metro, Harlow Metro, The Harvey Centre
    - 5 Lidl, Staple Tyre Shopping Centre
  - Out-of-centre foodstores
    - 6 J Sainsbury, Fifth Avenue, Allende Avenue
    - 7 Tesco, East Road, Edinburgh Way
  - >3,000 sq m
  - <3,000 sq m
  - Out-of-Centre Retail Warehousing
    - 1 Harlow Retail Park, Edinburgh Way
    - 2 The Queensgate Centre, Edinburgh Way
    - 3 The Oaks Retail Park, Edinburgh Way
    - 4 St James Centre, Edinburgh Way
    - 5 Princes Gate Retail Park, Edinburgh Way
    - 6 Stand-alone



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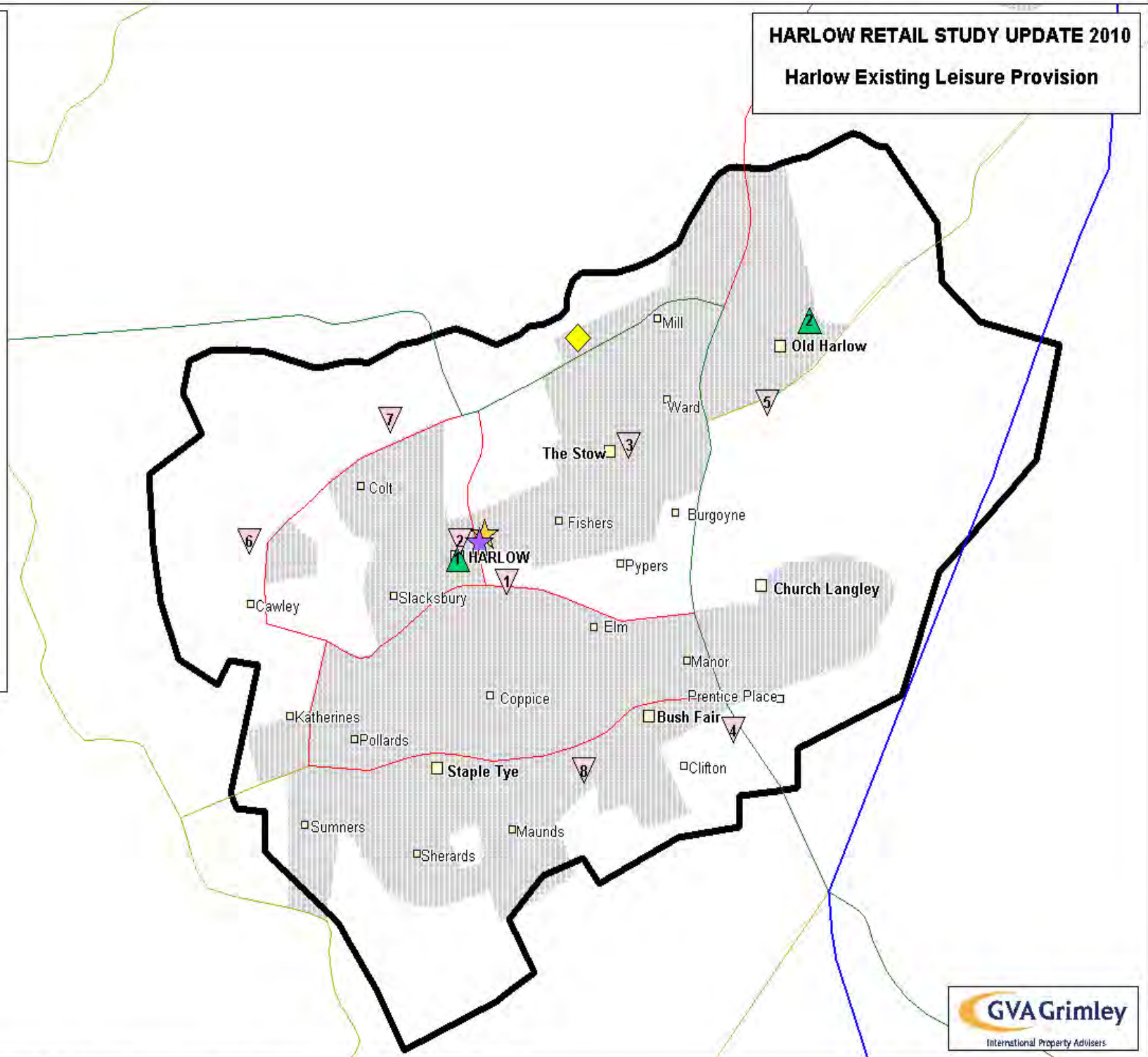
**PLAN 14**

**HARLOW LEISURE PROVISION**

---

**KEY**

- Harlow District Boundary
- Town Centre
- Neighbourhood Centre
- Local Centre (Hatch)
- ◆ Cinema  
Cineworld, Harlow
- ★ Bingo  
Mecca Bingo, Harlow
- ☆ Bowling  
First Bowl, Harlow
- ▽ Health & Fitness
  - 1 Harlow Leisurezone
  - 2 Esporta
  - 3 Body Active
  - 4 Park Inn
  - 5 Mark Hall Sports Centre
  - 6 Harlow Town Football Club
  - 7 Harlow Rugby Club
  - 8 Harlow Tennis Club
- ▲ Theatre
  - 1 Playhouse, Harlow
  - 2 Victoria Hall, Harlow



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## **APPENDIX 1**

### **COMPETING CENTRES**

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## **APPENDIX 1A**

### **KEY INDICATORS**



# Competing Centres: Key Indicators

**Table 1: Javelin Rank**

Centre	Rank (2009)	Change in Rank (2008)
Central London*	15	↓ (9)
Lakeside	61	↑ (71)
Chelmsford	124	↓ (111)
<b>Harlow</b>	<b>193</b>	<b>↓ (149)</b>
Enfield	211	↓ (183)
Welwyn Garden City	216	↓ (202)
Bishop's Stortford	253	↓ (232)
Waltham Cross	474	↑ (479)
Brookfield	722	↑ (740)

Source: Venue Score/Javelin 2009 \*Oxford Street

**Table 2: Retail Floorspace**

Centre	Sqm Gross
Central London	1,299,138
Chelmsford	134,003
Lakeside	130,222
<b>Harlow</b>	<b>95,876</b>
Bishop's Stortford	65,580
Enfield	56,076
Welwyn Garden City	50,539
Waltham Cross	39,753
Brookfield	30,426

Source: Goad Category Reports

**Table 3: Comparison Goods Trade Draw %**

Centre	%
<b>Harlow</b>	<b>23.9%</b>
Bishop's Stortford	10.6%
Brookfield	7.0%
Welwyn Garden City	5.5%
Waltham Cross	5.0%
Lakeside	3.8%
Enfield	3.7%
Central London	3.2%
Chelmsford	2.8%

Source: GVA Grimley Modelling

**Table 4: Comparison Goods Trade Draw £m**

Centre	£m
<b>Harlow</b>	<b>£256,533</b>
Bishop's Stortford	£113,880
Brookfield	£74,963
Welwyn Garden City	£59,316
Waltham Cross	£53,670
Lakeside	£40,965
Enfield	£39,741
Central London	£34,567
Chelmsford	£30,518

Source: GVA Grimley Modelling

# Competing Centres: Key Indicators

**Table 5: Comparison of Prime Retail Yields (% Change)**

Centre	2005 %	2008 %	% Change
Central London*	5.25%	4.25%	-1%
Chelmsford	5.5%	4.5%	-1%
Lakeside	4.75%	4.75%	-
<b>Harlow</b>	<b>6.75%</b>	<b>5.75%</b>	<b>-1%</b>
Enfield	7%	5.75%	-1.25%
Bishop's Stortford	6.5%	6.5%	-
Welwyn Garden City	7%	7%	-
Waltham Cross	8%	8.5%	-0.5%
Brookfield	-	-	-

Source: Valuation Office Agency – Property Market Report \*West End

**Table 6: Comparison of Prime Retail Rents (£ per sqm)**

Centre	£ 2005	£ 2009	% Change
Central London*	£5,382	£5,705	+6%
Lakeside	£3,767	£3,552	-6%
Chelmsford	£1,777	£1,884	+6%
Enfield	£1,561	£1,292	-17%
Welwyn Garden City	£1,130	£1,023	-9%
Bishop's Stortford	£861	£861	-
<b>Harlow</b>	<b>£1,076</b>	<b>£753</b>	<b>-30%</b>
Waltham Cross	£592	£538	-9%
Brookfield	-	-	-

Source: Colliers In Town Retail Rents 2009 \*Oxford Street West

**Table 7: Retailer Demand, January 2010**

Centre	No. of Requirements
Chelmsford	35
Enfield	33
Welwyn Garden City	20
Bishop's Stortford	20
<b>Harlow</b>	<b>14</b>
Brookfield	-
Central London	-
Lakeside	-
Waltham Cross	-

Source: Focus (January 2010)

**Table 8: Distance from Horsham**

Centre	Miles (approx.)	Kilometres (approx.)
<b>Harlow</b>	-	-
Bishop's Stortford	9	13
Brookfield	11	18
Waltham Cross	14	22
Welwyn Garden City	16	26
Chelmsford	21	32
Enfield	20	32
Lakeside	25	40
Central London	28	45

Source: GVA Grimley

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## **APPENDIX 1B**

### **MARKET SHARES**

## HARLOW RETAIL STUDY UPDATE 2010

### COMPETING CENTRES - MARKET SHARE

Table 1: Comparison Goods Allocation 2010 - Market Share (%)

	RETAIL LOCATION	ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	ZONE 11
1	HARLOW	39.2%	48.4%	39.6%	19.7%	38.1%	12.2%	8.0%	25.7%	14.7%	32.0%	13.6%
2	RETAIL PARKS, EDINBURGH WAY	36.4%	36.5%	26.4%	22.3%	37.5%	15.9%	14.8%	17.9%	14.9%	10.7%	26.1%
3	BISHOPS STORTFORD	1.2%	2.2%	2.2%	37.9%	2.9%	52.6%	32.8%	5.1%	0.3%	0.4%	0.4%
4	BROOKFIELD, CHESHUNT	1.2%	0.6%	8.5%	1.1%	3.7%	0.3%	0.0%	4.5%	18.0%	4.3%	0.0%
5	WELWYN GARDEN CITY	0.6%	2.6%	7.5%	4.8%	3.2%	2.6%	0.5%	16.8%	10.4%	0.2%	0.2%
6	WALTHAM CROSS	1.5%	0.0%	0.6%	0.3%	1.4%	0.3%	0.3%	0.2%	12.7%	6.9%	0.6%
7	LAKESIDE SHOPPING CENTRE	10.1%	1.7%	2.1%	1.7%	3.6%	2.9%	0.8%	1.6%	2.2%	7.6%	4.2%
8	ENFIELD	0.3%	0.2%	1.2%	0.1%	0.0%	0.4%	0.3%	0.3%	8.6%	7.0%	0.2%
9	CENTRAL LONDON	3.5%	1.9%	0.9%	1.9%	3.1%	2.4%	1.6%	1.0%	4.8%	4.2%	3.3%
10	CHELMSFORD	0.5%	1.5%	0.0%	0.7%	1.9%	0.9%	19.3%	0.0%	0.9%	0.7%	29.1%
11	CAMBRIDGE	1.0%	0.0%	0.0%	4.2%	1.5%	5.2%	9.7%	0.5%	0.8%	0.0%	1.5%
12	STEVENAGE	0.1%	0.3%	0.8%	0.0%	0.0%	0.0%	0.0%	8.3%	0.5%	0.0%	0.0%
	<b>SUB-TOTAL</b>	<b>95.5%</b>	<b>95.8%</b>	<b>89.8%</b>	<b>94.7%</b>	<b>96.8%</b>	<b>95.6%</b>	<b>88.0%</b>	<b>81.8%</b>	<b>88.8%</b>	<b>74.0%</b>	<b>79.3%</b>
	Other	4.5%	4.2%	10.2%	5.3%	3.2%	4.4%	12.0%	18.2%	11.2%	26.0%	20.7%
	<b>TOTAL</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Household Telephone Survey, June 2010

# HARLOW RETAIL STUDY UPDATE 2010

## COMPETING CENTRES - MARKET SHARE

Table 2: Comparison Goods Allocation 2010 - Spend (£)

	RETAIL LOCATION	ZONE 1 (£000)	ZONE 2 (£000)	ZONE 3 (£000)	ZONE 4 (£000)	ZONE 5 (£000)	ZONE 6 (£000)	ZONE 7 (£000)	ZONE 8 (£000)	ZONE 9 (£000)	ZONE 10 (£000)	ZONE 11 (£000)	TOTAL (£000)
1	HARLOW	48,198	25,186	23,716	15,386	7,600	11,567	5,885	19,189	45,970	49,543	4,294	<b>256,533</b>
2	RETAIL PARKS, EDINBURGH WAY	44,714	18,979	15,771	17,453	7,494	15,144	10,866	13,387	46,448	16,566	8,227	<b>215,048</b>
3	BISHOPS STORTFORD	1,534	1,124	1,334	29,615	571	50,110	24,142	3,834	854	630	132	<b>113,880</b>
4	BROOKFIELD, CHESHUNT	1,428	308	5,103	883	731	282	0	3,356	56,152	6,721	0	<b>74,963</b>
5	WELWYN GARDEN CITY	778	1,352	4,511	3,756	644	2,471	373	12,527	32,522	313	69	<b>59,316</b>
6	WALTHAM CROSS	1,815	0	336	208	274	239	185	161	39,611	10,650	191	<b>53,670</b>
7	LAKESIDE SHOPPING CENTRE	12,448	871	1,284	1,295	714	2,788	570	1,161	6,809	11,705	1,320	<b>40,965</b>
8	ENFIELD	309	100	725	84	0	341	185	188	26,897	10,844	69	<b>39,741</b>
9	CENTRAL LONDON	4,261	997	511	1,488	623	2,266	1,208	742	15,008	6,421	1,042	<b>34,567</b>
10	CHELMSFORD	618	802	0	581	373	824	14,199	0	2,933	1,041	9,147	<b>30,518</b>
11	CAMBRIDGE	1,202	0	0	3,307	306	4,936	7,131	409	2,599	0	471	<b>20,361</b>
12	STEVENAGE	132	161	451	0	0	0	0	6,186	1,545	0	0	<b>8,475</b>
	<b>SUB-TOTAL</b>	<b>117,435</b>	<b>49,880</b>	<b>53,741</b>	<b>74,056</b>	<b>19,330</b>	<b>90,967</b>	<b>64,744</b>	<b>61,140</b>	<b>277,350</b>	<b>114,434</b>	<b>24,961</b>	<b>948,038</b>
	Other	5,495	2,164	6,088	4,163	630	4,228	8,836	13,644	35,065	40,176	6,527	127,016
	<b>TOTAL</b>	<b>122,930</b>	<b>52,044</b>	<b>59,829</b>	<b>78,219</b>	<b>19,959</b>	<b>95,196</b>	<b>73,579</b>	<b>74,785</b>	<b>312,415</b>	<b>154,609</b>	<b>31,489</b>	<b>1,075,054</b>

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## **APPENDIX 1C**

### **PIPELINE SCHEMES**

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# Key Town Centre Pipeline Schemes

## Bishop's Stortford

- Henderson are pursuing the redevelopment of the Old River Lane in the north eastern quarter of the centre. The proposed scheme includes a new department store, an extension to the existing Waitrose supermarket, retail units, restaurants, a cinema, hotel, new homes and additional town centre car parking.

## Brookfield

- There are proposals for some further retail and leisure development at Greater Brookfield. This is currently coming forward in their Core Strategy.

## Welwyn Garden City

- Full planning permission has been granted for the redevelopment of the Sainsbury's on Church Road to provide a larger store comprising c.5,574 sqm gross floorspace, including a mezzanine level.
- There are preliminary proposals for a possible foodstore and/or leisure, residential and business uses at the Cereal Partners and Roche sites adjacent to Welwyn Garden City train station. An application is expected from Tesco on the Cereal Partners site. An application for residential and community uses on the Roche site has been refused.

## Waltham Cross

- None reported.

## Lakeside

- An allocation has been made for an additional 50,000 sqm net retail floorspace following the Single Issues Review EiP. This is to allow the shopping centre and retail park to combine into one coherent retail destination. The allocation also includes a residential element.

## Enfield

- None reported.

## Chelmsford

- The Council's Town Centre AAP indicates scope for an increase of up to 69,675 sqm net retail floorspace by 2021. There had been discussions over potential to extend the Meadows shopping centre, however in March 2010 the Council cancelled its development agreement with Lend Lease over this. The Council are now exploring new options.
- Outline consent was granted in May 2010 for a retail-led mixed use scheme on land to the east of High Street (Waterloo Lane) involving c.16,722 sqm gross floorspace, of which 12,634 sqm gross is likely to be retail. It is likely that the development will include one large store, unit shops and a number of bars and restaurants fronting the waterside.
- Planning consent has been granted for the conversion and sub-division of the former Allders store for a mix of retail and leisure uses.

Source: Promis and GVA Grimley, 2010

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## **APPENDIX 2**

### **HARLOW TOWN CENTRE HEALTH CHECK**



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## **APPENDIX 2A**

### **PPS4 HEALTH CHECK INDICATORS**

# PPS4 Town Centre Health Check Indicators

- A1:** Diversity of main town centre uses (by number, type and amount of floorspace): the amount of space in use for different functions – such as offices; shopping; leisure, cultural and entertainment activities; pubs, cafes and restaurants; and hotels.
- A2:** The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations.
- A3:** The potential capacity for growth or change of centres in the network: opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development.
- A4:** Retailer representation and intentions to change representation: existence and changes in representation of types of retailer, including street markets, and the demand of retailers wanting to come into the centre, or to change their representation in the centre, or to reduce or close their representation.
- A5:** Shopping rents: pattern of movement in Zone A rents within primary shopping areas (i.e. the retail value for the first 6 metres depth of floorspace in retail units from the shop window)
- A6:** Proportion of vacant street level property and the length of time properties have been vacant: vacancies can arise even in the strongest town centres, and this indicator must be used with care. Vacancies in secondary frontages and changes to other uses will also be useful indicators.
- A7:** Commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental): demonstrates the confidence of investors in the long-term profitability of the centre for retail, office and other commercial developments. This indicator should be used with care.
- A8:** Land values and the length of time key sites have remained undeveloped: data on changes in land value and how long key town centre and edge of centres sites have remained undeveloped provide important indicators for how flexible policies should be framed and can help inform planning decisions.
- A9:** Pedestrian flows (footfall): a key indicator of the vitality of shopping streets, measured by the numbers and movement of people on the streets, in different parts of the centre at different times of the day and evening, who are available for businesses to attract into shops restaurants and other facilities.
- A10:** Accessibility: ease and convenience of access by a choice of means of travel, including – the quality, quantity and type of car parking; the frequency and quality of public transport services and the range of customer origins served; and, the quality of provision for pedestrians, cyclists and disabled people and the ease of access from main arrival points to the main attractions.

- A11:** Customer and residents' views and behaviour: regular surveys will help authorities in monitoring and evaluating the effectiveness of town centre improvements and in setting further priorities. Interviews in the town centre and at home can be used to establish views of both users and non-users of the centre, including the views of residents living in or close to the centres. This information could also establish the degree of linked trips.
- A12:** Perception of safety and occurrence of crime: should include views and information on safety and security, including from the threat of terrorism, and where appropriate information for monitoring the evening and night-time economy.
- A13:** State of the town centre environmental quality: should include information on problems (such as air pollution, noise, clutter, litter and graffiti) and positive factors (such as trees, landscaping and open spaces).

Source: PPS4, Annex D

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## **APPENDIX 2B**

### **MAIN FOODSTORE REPRESENTATION**

## Harlow Town Centre: Foodstore Representation

Store (location)	Size (sqm net)	Date of Opening	% Non-food	Mezzanine Floor	Deli	Bakery	Café	Hot food Counter	Pharmacy	Fish Monger	Butcher	Petrol Station
Asda, Water Gardens	6,725	15/09/2003	44%	✓	✓	✓	✓	✓	✓	✓	✗	✓
Tesco Metro, Harvey Centre	1,970	15/06/1982	20%	✗	✓	✓	✗	✓	✗	✗	✗	✗
M&S Simply Food, Broadwalk	284	02/10/1969	0%	✗	✗	✓	✗	✗	✗	✗	✗	✗

Source: GVA Grimley//IGD

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## **APPENDIX 2C**

### **RETAILER REQUIREMENTS**

# Harlow Town Centre: Retailer Requirements

	Fascia	Description	Retail Category	Retail Use Class	Min. Floorspace sqm gross	Max. Floorspace sqm gross
1	Maison Blanc Limited	Bakers & confectioners	Convenience	A1	74	121
2	Millies Cookies	Bakers & confectioners	Convenience	A1	28	46
3	Greggs plc	Bakers & confectioners	Convenience	A1	74	111
				<b>Sub-total</b>	<b>176</b>	<b>278</b>
4	Ann Summers	Ladies wear & accessories	Comparison	A1	93	167
5	TJ Hughes Ltd	Variety store	Comparison	A1	2,323	13,935
6	Dr China	Chemists & Drugstores	Comparison	A1	28	74
7	Hatton Goldsmiths	Jewellers	Comparison	A1	27	93
8	The Fragrance Shop	Toiletries, cosmetics & beauty products	Comparison	A1	22	56
9	Sportec	Sports, camping & leisure goods	Comparison	A1	93	372
10	Fonehouse Group Ltd	Telephones & accessories	Comparison	A1	46	93
11	Profile Clothing	Clothing General	Comparison	A1	93	557
12	99p Stores Ltd	Variety store	Comparison	A1	465	743
13	Machine Mart	DIY & home improvement	Comparison	A1	186	1,394
				<b>Sub-total</b>	<b>3,376</b>	<b>17,484</b>
14	Subway	Hot food take away	Service	A5	46	167
15	Frankie & Benny's	Restaurant	Service	A3	325	465
				<b>Sub-total</b>	<b>371</b>	<b>632</b>
				<b>TOTAL</b>	<b>3,923</b>	<b>18,294</b>

Source: Focus Property Database, 2010

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## **APPENDIX 2D**

### **TOWN CENTRE SWOT ANALYSIS**



# Harlow Town Centre: SWOT Analysis

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> <li>- Above average representation from comparison retailers (+2.10%);</li> <li>- Below average service provision but good provision of banks, building societies and employment services. No obvious concentration of less desirable services e.g. fast-food take aways;</li> <li>- Only a marginal increase in yields during 2008 suggesting a reasonable level of on-going investor confidence and town centre viability despite the recent recession;</li> <li>- Strong representation from key multiple retailers which equate to 55.23% of all retailers. Major anchors include M&amp;S, Bhs, Primark and Wilkinson;</li> <li>- Good range of independent and specialist retailers, particularly on the upper floor of the Harvey Centre, creating a unique variety which complements the more mainstream shopping offer;</li> <li>- The Harvey Centre offers a reasonably modern shopping centre facility which accommodates a range of multiple, independent and specialist retailers</li> <li>- Other focal areas include:               <ul style="list-style-type: none"> <li>o The Water Gardens – newest development in the centre provides large format units, all of which are occupied by multiple retailers. Also includes Asda and a restaurant offer overlooking the landscaped water gardens;</li> <li>o Broadwalk– the main thoroughfare between Town Centre North and South. Generally comprises smaller units occupied by a range of multiple and independent operators;</li> <li>o Stone Cross – accommodates Harlow Market five days a week excluding Wednesdays and Sundays;</li> </ul> </li> <li>- Current requirements come from a range of comparison and service operators including TJ Hughes, Ann Summers, Maison Blanc Patisseries and Millies Cookies.</li> <li>- Harlow is well connected to the road network and benefits from good links by public transport, although the station is disconnected from the town centre;</li> <li>- The quality of the shopping environment and public realm varies – the Water Gardens and Harvey Centre are generally of a higher quality and well-maintained;</li> <li>- Reasonable range of leisure facilities including a theatre, bowling, bingo, nightclub and restaurant offer.</li> </ul>	<ul style="list-style-type: none"> <li>- Above average number of vacant units (+7.44%) equating to 13,750 sqm gross vacant floorspace: an increase of 2,788 sqm gross since 2006;</li> <li>- There is below average representation from convenience retailers (-1.01%). The convenience store offer is dominated by Asda at the Water Gardens and the Tesco Metro within the Harvey Centre. There is also an M&amp;S Simply Food court within the M&amp;S department store.</li> <li>- The Tesco Metro store is dated and cramped. The store is not prominently located, situated towards the rear of the Harvey Centre;</li> <li>- Below average service provision (-8.53%) and a particularly low proportion of dry cleaners and laundrettes, financial services and property services.</li> <li>- Prime Zone A rents have experienced a 30% fall between 2008 and 2009. Although this is consistent with national trends and effects of the recent recession;</li> <li>- Retailer requirements have fallen since 2006. In May 2010, there were 15 retailer requirements seeking between 3,923 - 18,394 sqm gross floorspace;</li> <li>- The number of vacant units has increased since the previous study in 2007 the majority of which are located in the central and northern parts of the town centre – generally reflecting areas earmarked for redevelopment;</li> <li>- The majority of visitors travel by car (83%), just over 10% travel by bus and less than 1% travel by train;</li> <li>- Generally low frequency of visits – 10% visit 2-3 times a week, 11% visit once a week and 15% visit once a fortnight. The majority (22%) visit once a month which could be improved.</li> <li>- The quality of the environment and the public realm is generally poorer in Town Centre North;</li> </ul>
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> <li>- Scope to enhance the range of comparison goods on offer e.g. department store, more higher order fashion retailers and homeware stores;</li> <li>- Opportunity to build on the leisure offer, particularly through the provision of new quality eating/drinking outlets as a means to enhance the night time economy;</li> <li>- Scope to reinstate a cinema facility within the town centre;</li> <li>- High potential for redevelopment of TCN to overcome weaknesses of the existing built environment which is inward facing, dated and, in parts, poorly maintained.</li> </ul>	<ul style="list-style-type: none"> <li>- Increasing competition from out-of-centre retail warehousing at Edinburgh Way</li> <li>- Competition from new developments in competing centres and in particular, Stratford City;</li> <li>- Planning permission to extend the Harvey Centre has not been delivered and remains uncertain;</li> <li>- Increasing vacant units in Town Centre North could further undermine the environment and further dissuade shoppers and retailers alike;</li> <li>- The Council's chosen development partner to bring forward the redevelopment of Town Centre North has withdrawn from the scheme;</li> <li>- A 'do-nothing' scenario in Harlow may result in increasing leakage of trade/loss of market share.</li> </ul>

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## **APPENDIX 3**

### **CONVENIENCE GOODS CAPACITY PROJECTIONS**

## HARLOW RETAIL STUDY UPDATE 2010

Table 1: Survey Area Population Forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
<b>2010</b>	47,719	21,612	21,737	25,244	6,828	31,661	24,053	25,149	111,938	55,930	10,806	<b>382,677</b>
<b>2015</b>	51,338	22,822	22,872	26,370	7,051	32,830	25,133	26,035	115,473	56,998	10,922	<b>397,844</b>
<b>2020</b>	54,998	24,234	24,136	27,575	7,298	34,257	26,433	26,968	119,512	58,081	11,005	<b>414,497</b>
<b>2025</b>	58,655	25,773	25,355	28,700	7,616	35,588	27,606	27,891	123,119	59,388	11,086	<b>430,777</b>
<b>2026</b>	59,263	26,032	25,549	28,861	7,650	35,817	27,845	28,057	123,861	59,624	11,111	<b>433,670</b>
<b>2031</b>	59,877	26,294	25,744	29,023	7,684	36,047	28,086	28,224	124,607	59,861	11,136	<b>436,584</b>

Source: Experian Business Solutions, May 2010

Table 1A: Population Growth Rates

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
<b>2010-2015 (%)</b>	7.6	5.6	5.2	4.5	3.3	3.7	4.5	3.5	3.2	1.9	1.1	<b>4.0</b>
<b>2010-2020 (%)</b>	15.3	12.1	11.0	9.2	6.9	8.2	9.9	7.2	6.8	3.8	1.8	<b>8.3</b>
<b>2010-2025 (%)</b>	22.9	19.3	16.6	13.7	11.5	12.4	14.8	10.9	10.0	6.2	2.6	<b>12.6</b>
<b>2010-2026 (%)</b>	24.2	20.5	17.5	14.3	12.0	13.1	15.8	11.6	10.7	6.6	2.8	<b>13.3</b>
<b>2010-2031 (%)</b>	25.5	21.7	18.4	15.0	12.5	13.9	16.8	12.2	11.3	7.0	3.1	<b>14.1</b>

Source: Experian Business Solutions, May 2010

Table 1B: Survey Area Postcodes

ZONE	POSTCODES
<b>1</b>	CM17 9, CM18 6, CM18 7, CM19 4
<b>2</b>	CM20 1, CM20 2, CM20 3
<b>3</b>	CM19 5, EN11 0, SG12 8
<b>4</b>	CM21 0, CM21 9, CM23 4, SG10 6
<b>5</b>	CM17 0
<b>6</b>	CM22 7, CM23 2, CM23 3, CM 23 5
<b>7</b>	CM22 6, CM32 1, CM24 1, CM24 8, CM6 1
<b>8</b>	SG11 1, SG11 2, SG12 0, SG12 7
<b>9</b>	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
<b>10</b>	CM16 4, CM16 5, CM16 6, CM16 7, EN9 1, EN9 2, EN9 3, IG10 2
<b>11</b>	CM5 0, CM5 9

## HARLOW RETAIL STUDY UPDATE 2010

**Table 2: Convenience Goods Retail Expenditure Forecasts Per Capita (2008 Prices)**

	Growth in Per Capita Expenditure:										
	2008 - 2009 -0.5% pa 2009 - 2010 0.1% pa 2010 - 2015 1.0% pa 2015 - 2031 0.5% pa (ultra long term trend)										
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
2008	1,896	1,863	1,851	1,992	2,010	1,974	1,996	1,942	1,867	1,905	1,940
2008 (Minus SFT at 3%)	1,839	1,807	1,795	1,932	1,950	1,915	1,936	1,884	1,811	1,848	1,882
2009	1,887	1,854	1,842	1,982	2,000	1,964	1,986	1,932	1,858	1,895	1,930
2009 (Minus SFT at 3.5%)	1,820	1,789	1,777	1,913	1,930	1,895	1,917	1,865	1,793	1,829	1,863
2010	1,888	1,856	1,844	1,984	2,002	1,966	1,988	1,934	1,860	1,897	1,932
2010 (Minus SFT at 3.8%)	1,817	1,785	1,774	1,909	1,926	1,891	1,912	1,861	1,789	1,825	1,859
2015	1,985	1,950	1,938	2,085	2,104	2,066	2,089	2,033	1,954	1,994	2,031
2015 (Minus SFT at 4.8%)	1,889	1,857	1,845	1,985	2,003	1,967	1,989	1,935	1,861	1,898	1,933
2020	2,035	1,999	1,987	2,138	2,157	2,119	2,142	2,084	2,004	2,045	2,082
2020 (Minus SFT at 5.2%)	1,929	1,895	1,883	2,027	2,045	2,008	2,031	1,976	1,900	1,938	1,974
2025	2,086	2,050	2,037	2,192	2,212	2,172	2,196	2,137	2,054	2,096	2,135
2025 (Minus SFT at 5.4%)	1,974	1,939	1,927	2,074	2,092	2,055	2,078	2,021	1,943	1,983	2,019
2026	2,097	2,060	2,047	2,203	2,223	2,183	2,207	2,148	2,065	2,107	2,145
2026 (Minus SFT at 5.5%)	1,981	1,947	1,934	2,082	2,100	2,063	2,086	2,029	1,951	1,991	2,027
2031	2,150	2,112	2,099	2,258	2,279	2,238	2,263	2,202	2,117	2,160	2,199
2031 (Minus SFT at 5.5%)	2,031	1,996	1,983	2,134	2,154	2,115	2,139	2,081	2,000	2,041	2,079

Source: Experian Business Solutions, May 2010

**Table 3: Total Survey Area Convenience Goods Retail Expenditure (£000) 2008 Prices**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
2010	86,689	38,578	38,551	48,181	13,150	59,883	46,000	46,795	200,242	102,087	20,086	<b>700,243</b>
2015	97,001	42,371	42,190	52,348	14,124	64,583	49,993	50,386	214,845	108,207	21,116	<b>757,164</b>
2020	106,093	45,935	45,454	55,887	14,925	68,802	53,680	53,284	227,017	112,572	21,722	<b>805,370</b>
2025	115,760	49,980	48,852	59,510	15,935	73,125	57,356	56,381	239,268	117,763	22,387	<b>856,316</b>
2026	117,421	50,681	49,420	60,079	16,069	73,885	58,080	56,939	241,658	118,697	22,526	<b>865,455</b>
2031	121,634	52,483	51,056	61,942	16,548	76,239	60,063	58,725	249,253	122,178	23,147	<b>893,265</b>

Source: Tables 1 and 2

## HARLOW RETAIL STUDY UPDATE 2010

Table 4: Asda, Watergardens, Harlow Town Centre: Convenience Goods Allocation - % Market Share

Asda, Watergardens	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
2010	9.1%	11.2%	6.3%	1.4%	5.0%	1.4%	0.9%	2.6%	2.6%	3.0%	3.1%
2015	9.1%	11.2%	6.3%	1.4%	5.0%	1.4%	0.9%	2.6%	2.6%	3.0%	3.1%
2020	9.1%	11.2%	6.3%	1.4%	5.0%	1.4%	0.9%	2.6%	2.6%	3.0%	3.1%
2025	9.1%	11.2%	6.3%	1.4%	5.0%	1.4%	0.9%	2.6%	2.6%	3.0%	3.1%
2026	9.1%	11.2%	6.3%	1.4%	5.0%	1.4%	0.9%	2.6%	2.6%	3.0%	3.1%
2031	9.1%	11.2%	6.3%	1.4%	5.0%	1.4%	0.9%	2.6%	2.6%	3.0%	3.1%

Source: Harlow Household Telephone Survey, June 2010

Table 5: Asda, Watergardens, Harlow Town Centre: Convenience Goods Allocation - Spend (£000) 2008 Prices

Asda, Watergardens	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
2010	7,889	4,321	2,419	662	651	808	414	1,228	5,256	3,088	623	27,360
2015	8,827	4,746	2,647	720	699	872	450	1,323	5,640	3,273	655	29,851
2020	9,654	5,145	2,852	768	739	929	483	1,399	5,959	3,405	673	32,007
2025	10,534	5,598	3,065	818	789	987	516	1,480	6,281	3,562	694	34,325
2026	10,685	5,676	3,101	826	795	997	523	1,495	6,344	3,591	698	34,731
2031	11,069	5,878	3,204	852	819	1,029	541	1,542	6,543	3,696	718	35,889

Source: Tables 3 and 4

Table 6: Tesco Metro, Harvey Centre, Harlow Town Centre: Convenience Goods Allocation - % Market Share

Tesco Metro, Harvey Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
2010	0.9%	8.1%	3.1%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2015	0.9%	8.1%	3.1%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2020	0.9%	8.1%	3.1%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2025	0.9%	8.1%	3.1%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2026	0.9%	8.1%	3.1%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2031	0.9%	8.1%	3.1%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Source: Harlow Household Telephone Survey, June 2010

Table 7: Tesco Metro, Harvey Centre, Harlow Town Centre: Convenience Goods Allocation - Spend (£000) 2008 Price:

Tesco Metro, Harvey Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
2010	780	3,125	1,195	-	53	-	-	-	-	-	-	5,153
2015	873	3,432	1,308	-	56	-	-	-	-	-	-	5,669
2020	955	3,721	1,409	-	60	-	-	-	-	-	-	6,144
2025	1,042	4,048	1,514	-	64	-	-	-	-	-	-	6,668
2026	1,057	4,105	1,532	-	64	-	-	-	-	-	-	6,758
2031	1,095	4,251	1,583	-	66	-	-	-	-	-	-	6,995

Source: Tables 3 and 6

## HARLOW RETAIL STUDY UPDATE 2010

Table 8: Marks and Spencer Foodhall, Harlow Town Centre: Convenience Goods Allocation - % Market Share

M&S Foodhall, Harlow	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
2010	1.7%	1.7%	0.5%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%
2015	1.7%	1.7%	0.5%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%
2020	1.7%	1.7%	0.5%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%
2025	1.7%	1.7%	0.5%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%
2026	1.7%	1.7%	0.5%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%
2031	1.7%	1.7%	0.5%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%

Source: Harlow Household Telephone Survey, June 2010

Table 9: Marks and Spencer Foodhall, Harlow Town Centre: Convenience Goods Allocation - Spend (£000) 2008 Prices

M&S Foodhall, Harlow	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
2010	1,495	646	183	-	-	-	-	421	-	-	-	2,746
2015	1,673	710	200	-	-	-	-	453	-	-	-	3,037
2020	1,830	769	216	-	-	-	-	480	-	-	-	3,295
2025	1,997	837	232	-	-	-	-	507	-	-	-	3,573
2026	2,026	849	235	-	-	-	-	512	-	-	-	3,622
2031	2,098	879	243	-	-	-	-	529	-	-	-	3,748

Source: Tables 3 and 8

## HARLOW RETAIL STUDY UPDATE 2010

Table 10: Tesco, Church Langley Centre: Convenience Goods Allocation - % Market Share

Tesco, Church Langley Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
2010	33.1%	8.1%	2.3%	0.0%	13.1%	2.2%	0.9%	0.0%	0.9%	5.2%	2.7%
2015	33.1%	8.1%	2.3%	0.0%	13.1%	2.2%	0.9%	0.0%	0.9%	5.2%	2.7%
2020	33.1%	8.1%	2.3%	0.0%	13.1%	2.2%	0.9%	0.0%	0.9%	5.2%	2.7%
2025	33.1%	8.1%	2.3%	0.0%	13.1%	2.2%	0.9%	0.0%	0.9%	5.2%	2.7%
2026	33.1%	8.1%	2.3%	0.0%	13.1%	2.2%	0.9%	0.0%	0.9%	5.2%	2.7%
2031	33.1%	8.1%	2.3%	0.0%	13.1%	2.2%	0.9%	0.0%	0.9%	5.2%	2.7%

Source: Harlow Household Telephone Survey, June 2010

Table 11: Tesco, Church Langley Centre: Convenience Goods Allocation - Spend (£000) 2008 Prices

Tesco, Church Langley Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
2010	28,672	3,125	877	-	1,726	1,302	414	-	1,802	5,334	542	43,795
2015	32,083	3,432	960	-	1,854	1,405	450	-	1,934	5,654	570	48,341
2020	35,090	3,721	1,034	-	1,959	1,496	483	-	2,043	5,882	586	52,295
2025	38,288	4,048	1,111	-	2,091	1,590	516	-	2,153	6,153	604	56,556
2026	38,837	4,105	1,124	-	2,109	1,607	523	-	2,175	6,202	608	57,290
2031	40,230	4,251	1,162	-	2,172	1,658	541	-	2,243	6,384	625	59,266

Source: Tables 3 and 10

Table 12: Lidl, Staple Tye: Convenience Goods Allocation - % Market Share

Lidl, Staple Tye	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
2010	4.8%	0.0%	0.5%	0.0%	0.4%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
2015	4.8%	0.0%	0.5%	0.0%	0.4%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
2020	4.8%	0.0%	0.5%	0.0%	0.4%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
2025	4.8%	0.0%	0.5%	0.0%	0.4%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
2026	4.8%	0.0%	0.5%	0.0%	0.4%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
2031	4.8%	0.0%	0.5%	0.0%	0.4%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%

Source: Harlow Household Telephone Survey, June 2010

Table 13: Lidl, Staple Tye: Convenience Goods Allocation - Spend (£000) 2008 Prices

Lidl, Staple Tye	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
2010	4,118	-	183	-	53	269	-	-	-	-	-	4,623
2015	4,608	-	200	-	56	291	-	-	-	-	-	5,155
2020	5,039	-	216	-	60	310	-	-	-	-	-	5,625
2025	5,499	-	232	-	64	329	-	-	-	-	-	6,123
2026	5,577	-	235	-	64	332	-	-	-	-	-	6,209
2031	5,778	-	243	-	66	343	-	-	-	-	-	6,429

Source: Tables 3 and 12

## HARLOW RETAIL STUDY UPDATE 2010

Table 14: Sainsbury's, Allende Avenue: Convenience Goods Allocation - % Market Share

Sainsbury's Allende Avenue	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
2010	20.5%	36.4%	21.8%	4.2%	11.4%	0.9%	0.0%	1.8%	1.7%	0.9%	3.1%
2015	20.5%	36.4%	21.8%	4.2%	11.4%	0.9%	0.0%	1.8%	1.7%	0.9%	3.1%
2020	20.5%	36.4%	21.8%	4.2%	11.4%	0.9%	0.0%	1.8%	1.7%	0.9%	3.1%
2025	20.5%	36.4%	21.8%	4.2%	11.4%	0.9%	0.0%	1.8%	1.7%	0.9%	3.1%
2026	20.5%	36.4%	21.8%	4.2%	11.4%	0.9%	0.0%	1.8%	1.7%	0.9%	3.1%
2031	20.5%	36.4%	21.8%	4.2%	11.4%	0.9%	0.0%	1.8%	1.7%	0.9%	3.1%

Source: Harlow Household Telephone Survey, June 2010

Table 15: Sainsbury's, Allende Avenue: Convenience Goods Allocation - Spend (£000) 2008 Prices

Sainsbury's Allende Avenue	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
2010	17,728	14,023	8,395	2,000	1,499	539	-	842	3,454	919	623	50,021
2015	19,837	15,402	9,187	2,172	1,610	581	-	907	3,706	974	655	55,031
2020	21,696	16,697	9,898	2,319	1,701	619	-	959	3,916	1,013	673	59,493
2025	23,673	18,168	10,638	2,470	1,817	658	-	1,015	4,127	1,060	694	64,319
2026	24,013	18,422	10,761	2,493	1,832	665	-	1,025	4,169	1,068	698	65,146
2031	24,874	19,077	11,117	2,571	1,886	686	-	1,057	4,300	1,100	718	67,386

Source: Tables 3 and 14

Table 16: Tesco, Edinburgh Way: Convenience Goods Allocation - % Market Share

Tesco, Edinburgh Way	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
2010	17.9%	23.5%	11.1%	17.6%	49.1%	2.6%	0.0%	0.9%	0.0%	0.0%	4.0%
2015	17.9%	23.5%	11.1%	17.6%	49.1%	2.6%	0.0%	0.9%	0.0%	0.0%	4.0%
2020	17.9%	23.5%	11.1%	17.6%	49.1%	2.6%	0.0%	0.9%	0.0%	0.0%	4.0%
2025	17.9%	23.5%	11.1%	17.6%	49.1%	2.6%	0.0%	0.9%	0.0%	0.0%	4.0%
2026	17.9%	23.5%	11.1%	17.6%	49.1%	2.6%	0.0%	0.9%	0.0%	0.0%	4.0%
2031	17.9%	23.5%	11.1%	17.6%	49.1%	2.6%	0.0%	0.9%	0.0%	0.0%	4.0%

Source: Harlow Household Telephone Survey, June 2010

Table 17: Tesco, Edinburgh Way: Convenience Goods Allocation - Spend (£000) 2008 Prices

Tesco, Edinburgh Way	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
2010	15,496	9,047	4,260	8,480	6,450	1,572	-	421	-	-	803	46,529
2015	17,339	9,936	4,662	9,213	6,928	1,695	-	453	-	-	845	51,071
2020	18,964	10,772	5,023	9,836	7,321	1,806	-	480	-	-	869	55,070
2025	20,692	11,720	5,398	10,474	7,816	1,920	-	507	-	-	895	59,423
2026	20,989	11,885	5,461	10,574	7,882	1,939	-	512	-	-	901	60,143
2031	21,742	12,307	5,642	10,902	8,117	2,001	-	529	-	-	926	62,165

Source: Tables 3 and 16



## HARLOW RETAIL STUDY UPDATE 2010

Table 18: Harlow Existing Convenience Goods Floorspace 2010

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sqm net)	Total Potential Turnover (£000s)
<b>Harlow Town Centre</b>					
Asda, Watergardens	6,725	56%	3,766	14,352	54,050
Tesco Metro, Harvey Centre	1,970	80%	1,576	12,883	20,304
M&S Simply Food, Broad Walk Mall	284	100%	284	11,686	3,319
<b>Sub Total</b>	<b>8,979</b>	<b>-</b>	<b>5,626</b>	<b>13,806</b>	<b>77,672</b>
<b>Church Langley</b>					
Tesco, Church Langley Centre	3,637	80%	2,910	12,883	37,484
<b>Staple Tye</b>					
Lidl, Staple Tye Shopping Centre	912	95%	866	2,961	2,565
<b>Out-of-Centre</b>					
Sainsbury's, Allende Avenue	5,050	70%	3,535	9,990	35,315
Tesco, Edinburgh Way	3,874	90%	3,487	12,883	44,918
<b>TOTAL</b>	<b>22,452</b>	<b>-</b>	<b>16,424</b>	<b>12,053</b>	<b>197,954</b>

Source: Harlow Council / IGD Database / Experian Goad / Mintel

## HARLOW RETAIL STUDY UPDATE 2010

Table 19: Convenience Goods Commitments

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales (£ per sqm net)	Average Turnover 2010 (£000)	Average Turnover 2015 (£000)	Average Turnover 2020 (£000)	Average Turnover 2025 (£000)	Average Turnover 2026 (£000)	Average Turnover 2031 (£000)
New Aldi store, First Avenue (The Stow)	990	95%	941	4,011	3,772	3,848	3,946	4,045	4,065	4,168
<b>TOTAL</b>	<b>990</b>	<b>-</b>	<b>941</b>		<b>3,772</b>	<b>3,848</b>	<b>3,946</b>	<b>4,045</b>	<b>4,065</b>	<b>4,168</b>

Source: Harlow Council

## HARLOW RETAIL STUDY UPDATE 2010

Table 20: Harlow District Global Convenience Goods Capacity Projections (based on large store format)

Growth in sales per sqm (Sales Efficiency)	2010 - 2015 - 0.4% per annum 2015 - 2031 - 0.5% per annum					
	2010	2015	2020	2025	2026	2031
A) Total Available Convenience Goods Expenditure (£000)	700,243	757,164	805,370	856,316	865,455	893,265
B) Harlow District Stores Market Share	26	26	26	26	26	26
C) Total Convenience Goods Turnover in Harlow District (£000)	180,226	198,155	210,633	230,988	233,900	241,878
D) Total Existing Convenience Goods Floorspace (sqm net)	16,424	16,424	16,424	16,424	16,424	16,424
E) Sales per sqm net (£)	10,974	12,053	12,357	12,669	12,733	13,054
F) Sales from Existing Floorspace (£000)	180,226	197,954	202,953	208,078	209,118	214,399
G) Sales from Commitments (£000)	-	3,848	3,946	4,045	4,065	4,168
H) Residual Spending to Support New Shops (£000)	-	-3,647	3,735	18,865	20,716	23,311
I) Sales per sqm net in new shops (£) Based on Large Store Format	10,000	10,202	10,459	10,723	10,777	11,049
<b>J) Capacity for new Convenience Floorspace (sqm net)</b>	<b>0</b>	<b>-358</b>	<b>357</b>	<b>1,759</b>	<b>1,922</b>	<b>2,110</b>

Source: Tables 5, 7, 9, 11, 13, 15, 17, 18 & 19

## HARLOW RETAIL STUDY UPDATE 2010

Table 21: Harlow District Global Convenience Goods Capacity Projections (based on discount/value store operator)

Growth in sales per sqm (Sales Efficiency)	2010 - 2015 - 0.4% per annum 2015 - 2031 - 0.5% per annum					
	2010	2015	2020	2025	2026	2031
Total Available Convenience Goods Expenditure (£000)	700,243	757,164	805,370	856,316	865,455	893,265
Harlow District Stores Market Share	26	26	26	26	26	26
Total Convenience Goods Turnover in Harlow District (£000)	180,226	198,155	210,633	230,988	233,900	241,878
Total Existing Convenience Goods Floorspace (sqm net)	16,424	16,424	16,424	16,424	16,424	16,424
Sales per sqm net (£)	10,974	12,053	12,357	12,669	12,733	13,054
Sales from Existing Floorspace (£000)	180,226	197,954	202,953	208,078	209,118	214,399
Sales from Commitments (£000)	-	3,848	3,946	4,045	4,065	4,168
Residual Spending to Support New Shops (£000)	-	-3,647	3,735	18,865	20,716	23,311
Sales per sqm net in new shops (£) Based on Large Store Format	4,000	4,081	4,184	4,289	4,311	4,420
<b>Capacity for new Convenience Floorspace (sqm net)</b>	<b>0</b>	<b>-894</b>	<b>893</b>	<b>4,398</b>	<b>4,806</b>	<b>5,274</b>

Source: Tables 5, 7, 9, 11, 13, 15, 17, 18 & 19

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## **APPENDIX 4**

### **COMPARISON GOODS CAPACITY PROJECTIONS**

## HARLOW RETAIL STUDY UPDATE 2010

Table 1: Survey Area Population Forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
<b>2010</b>	47,719	21,612	21,737	25,244	6,828	31,661	24,053	25,149	111,938	55,930	10,806	<b>382,677</b>
<b>2015</b>	51,338	22,822	22,872	26,370	7,051	32,830	25,133	26,035	115,473	56,998	10,922	<b>397,844</b>
<b>2020</b>	54,998	24,234	24,136	27,575	7,298	34,257	26,433	26,968	119,512	58,081	11,005	<b>414,497</b>
<b>2025</b>	58,655	25,773	25,355	28,700	7,616	35,588	27,606	27,891	123,119	59,388	11,086	<b>430,777</b>
<b>2026</b>	59,263	26,032	25,549	28,861	7,650	35,817	27,845	28,057	123,861	59,624	11,111	<b>433,670</b>
<b>2031</b>	59,877	26,294	25,744	29,023	7,684	36,047	28,086	28,224	124,607	59,861	11,136	<b>436,584</b>

Source: Experian Business Solutions, May 2010

Table 1A: Population Growth Rates

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
<b>2010-2015 (%)</b>	7.6	5.6	5.2	4.5	3.3	3.7	4.5	3.5	3.2	1.9	1.1	4.0
<b>2010-2020 (%)</b>	15.3	12.1	11.0	9.2	6.9	8.2	9.9	7.2	6.8	3.8	1.8	8.3
<b>2010-2025 (%)</b>	22.9	19.3	16.6	13.7	11.5	12.4	14.8	10.9	10.0	6.2	2.6	12.6
<b>2010-2026 (%)</b>	24.2	20.5	17.5	14.3	12.0	13.1	15.8	11.6	10.7	6.6	2.8	13.3
<b>2010-2031 (%)</b>	25.5	21.7	18.4	15.0	12.5	13.9	16.8	12.2	11.3	7.0	3.1	14.1

Source: Experian Business Solutions, May 2010

Table 1B: Survey Area Postcodes

ZONE	POSTCODES
1	CM17 9, CM18 6, CM18 7, CM19 4
2	CM20 1, CM20 2, CM20 3
3	CM19 5, EN11 0, SG12 8
4	CM21 0, CM21 9, CM23 4, SG10 6
5	CM17 0
6	CM22 7, CM23 2, CM23 3, CM 23 5
7	CM22 6, CM32 1, CM24 1, CM24 8, CM6 1
8	SG11 1, SG11 2, SG12 0, SG12 7
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
10	CM16 4, CM16 5, CM16 6, CM16 7, EN9 1, EN9 2, EN9 3, IG10 2
11	CM5 0, CM5 9

## HARLOW RETAIL STUDY UPDATE 2010

Table 2: Comparison Goods Retail Expenditure Forecasts Per Capita (2008 Prices)

	Growth in Per Capita Expenditure:										
	2008 - 2009 1.1% pa 2009 - 2010 -0.1% pa 2010 - 2015 2.3% pa 2015 - 2031 4.7% pa (ultra long term trend)										
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
2008	2,806	2,623	2,998	3,375	3,184	3,275	3,332	3,239	3,040	3,011	3,174
2008 (Minus SFT at 7.5%)	2,596	2,426	2,773	3,122	2,945	3,029	3,082	2,996	2,812	2,785	2,936
2009	2,837	2,652	3,031	3,412	3,219	3,311	3,369	3,275	3,073	3,044	3,209
2009 (Minus SFT at 8.5%)	2,596	2,426	2,773	3,122	2,945	3,030	3,082	2,996	2,812	2,785	2,936
2010	2,834	2,649	3,028	3,409	3,216	3,308	3,365	3,271	3,070	3,041	3,206
2010 (Minus SFT at 9.1%)	2,576	2,408	2,752	3,099	2,923	3,007	3,059	2,974	2,791	2,764	2,914
2015	3,175	2,968	3,393	3,819	3,603	3,706	3,771	3,665	3,440	3,407	3,592
2015 (Minus SFT at 11.4%)	2,813	2,630	3,006	3,384	3,192	3,284	3,341	3,247	3,048	3,019	3,182
2020	3,995	3,734	4,268	4,805	4,533	4,663	4,744	4,611	4,328	4,287	4,519
2020 (Minus SFT at 11.5%)	3,536	3,305	3,777	4,253	4,012	4,127	4,198	4,081	3,830	3,794	3,999
2025	5,026	4,699	5,370	6,046	5,703	5,866	5,969	5,802	5,445	5,394	5,685
2025 (Minus SFT at 11.5%)	4,448	4,158	4,753	5,350	5,048	5,192	5,282	5,135	4,819	4,773	5,032
2026	5,263	4,919	5,623	6,330	5,971	6,142	6,249	6,075	5,701	5,647	5,953
2026 (Minus SFT at 11.5%)	4,657	4,354	4,976	5,602	5,285	5,436	5,530	5,376	5,046	4,998	5,268
2031	6,621	6,189	7,074	7,964	7,513	7,728	7,862	7,643	7,173	7,105	7,489
2031 (Minus SFT at 11.5%)	5,860	5,478	6,261	7,048	6,649	6,839	6,958	6,764	6,348	6,288	6,628

Source: Experian Business Solutions, May 2010

Table 3: Total Survey Area Comparison Goods Retail Expenditure (2008 Prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
2010	122,930	52,044	59,829	78,219	19,959	95,196	73,579	74,785	312,415	154,609	31,489	1,075,054
2015	144,429	60,018	68,749	89,230	22,509	107,798	83,961	84,547	351,951	172,068	34,757	1,220,016
2020	194,449	80,093	91,173	117,263	29,278	141,362	110,974	110,060	457,780	220,352	44,012	1,596,797
2025	260,914	107,169	120,504	153,554	38,442	184,765	145,819	143,212	593,340	283,475	55,781	2,086,974
2026	276,009	113,333	127,133	161,673	40,428	194,694	153,994	150,836	624,971	297,977	58,534	2,199,582
2031	350,861	144,024	161,176	204,550	51,092	246,531	195,425	190,904	791,048	376,391	73,811	2,785,813

Source: Tables 1 and 2

## HARLOW RETAIL STUDY UPDATE 2010

Table 4: Harlow Town Centre: Comparison Goods Allocation - % Market Share

Harlow Town Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
2010	39.2%	48.4%	39.6%	19.7%	38.1%	12.2%	8.0%	25.7%	14.7%	32.0%	13.6%
2015	39.2%	48.4%	39.6%	19.7%	38.1%	12.2%	8.0%	25.7%	14.7%	32.0%	13.6%
2020	39.2%	48.4%	39.6%	19.7%	38.1%	12.2%	8.0%	25.7%	14.7%	32.0%	13.6%
2025	39.2%	48.4%	39.6%	19.7%	38.1%	12.2%	8.0%	25.7%	14.7%	32.0%	13.6%
2026	39.2%	48.4%	39.6%	19.7%	38.1%	12.2%	8.0%	25.7%	14.7%	32.0%	13.6%
2031	39.2%	48.4%	39.6%	19.7%	38.1%	12.2%	8.0%	25.7%	14.7%	32.0%	13.6%

Source: Harlow Household Telephone Survey, June 2010

Table 5: Harlow Town Centre: Comparison Goods Allocation - Spend (£000) 2008 Prices

Harlow Town Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
2010	48,198	25,186	23,716	15,386	7,600	11,567	5,885	19,189	45,970	49,543	4,294	256,533
2015	56,627	29,044	27,251	17,552	8,571	13,098	6,716	21,694	51,788	55,138	4,739	292,217
2020	76,238	38,759	36,140	23,066	11,149	17,176	8,876	28,240	67,360	70,610	6,001	383,616
2025	102,297	51,862	47,766	30,204	14,638	22,450	11,663	36,747	87,307	90,837	7,606	503,378
2026	108,215	54,845	50,394	31,801	15,395	23,657	12,317	38,703	91,961	95,484	7,981	530,753
2031	137,563	69,697	63,888	40,235	19,455	29,955	15,631	48,984	116,398	120,611	10,064	672,483

Source: Tables 3 and 4

Table 6: Retail Parks, Edinburgh Way: Comparison Goods Allocation - % Market Share

Retail Parks, Edinburgh Way	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
2010	36.4%	36.5%	26.4%	22.3%	37.5%	15.9%	14.8%	17.9%	14.9%	10.7%	26.1%
2015	36.4%	36.5%	26.4%	22.3%	37.5%	15.9%	14.8%	17.9%	14.9%	10.7%	26.1%
2020	36.4%	36.5%	26.4%	22.3%	37.5%	15.9%	14.8%	17.9%	14.9%	10.7%	26.1%
2025	36.4%	36.5%	26.4%	22.3%	37.5%	15.9%	14.8%	17.9%	14.9%	10.7%	26.1%
2026	36.4%	36.5%	26.4%	22.3%	37.5%	15.9%	14.8%	17.9%	14.9%	10.7%	26.1%
2031	36.4%	36.5%	26.4%	22.3%	37.5%	15.9%	14.8%	17.9%	14.9%	10.7%	26.1%

Source: Harlow Household Telephone Survey, June 2010

Table 7: Retail Parks, Edinburgh Way: Comparison Goods Allocation - Spend (£000) 2008 Prices

Retail Parks, Edinburgh Way	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
2010	44,714	18,979	15,771	17,453	7,494	15,144	10,866	13,387	46,448	16,566	8,227	215,048
2015	52,534	21,887	18,122	19,910	8,451	17,149	12,399	15,134	52,327	18,437	9,081	245,429
2020	70,728	29,208	24,033	26,165	10,993	22,488	16,388	19,701	68,061	23,610	11,499	322,873
2025	94,903	39,081	31,764	34,263	14,434	29,393	21,533	25,636	88,215	30,374	14,574	424,169
2026	100,394	41,329	33,512	36,074	15,180	30,972	22,740	27,000	92,918	31,928	15,293	447,340
2031	127,620	52,521	42,485	45,642	19,184	39,219	28,859	34,173	117,609	40,329	19,284	566,925

Source: Tables 3 and 6



## HARLOW RETAIL STUDY UPDATE 2010

Table 8: Harlow Existing Comparison Goods Floorspace 2010

	Net Floorspace (sqm)	Sales Density (£ per sqm)	Turnover (£000)
Harlow Town Centre	38,195	-	-
<b>Harlow Retail Park, Edinburgh Way</b>			
Homebase	6,015	1,328	7,988
Argos Extra	1,282	21,375	27,403
Comet	1,529	7,690	11,761
<b>Sub Total</b>	<b>8,827</b>	<b>5,342</b>	<b>47,152</b>
<b>The Queensgate Centre, Edinburgh Way</b>			
Toys R Us	2,977	2,656	7,907
PC World	1,487	7,146	10,623
Mothercare World / Early Learning Centre	1,116	2,896	3,232
Sony Centre	186	4,000	743
ScS	669	2,074	1,386
Homestore & More	2,643	1,776	4,694
Bedstore & More	1,115	1,776	1,980
Currys	1,865	6,754	12,595
Hobbycraft	744	4,869	3,623
Easy Living Furniture	809	6,273	5,073
Laura Ashley	394	5,691	2,245
Brantano	546	11,168	6,102
Sportsworld	549	2,239	1,230
<b>Sub Total</b>	<b>15,100</b>	<b>4,069</b>	<b>61,433</b>
<b>The Oaks Retail Park, Edinburgh Way</b>			
B&Q	2,768	1,960	5,425
Topps Tiles	513	1,467	753
Halfords	1,111	2,494	2,771
Bathstore.com	269	1,776	478
Maplin Electronics	372	4,000	1,486
Jollyes	585	2,656	1,555
Carpetright	849	1,341	1,138
Harveys/Sleepmasters	1,874	1,776	3,328
<b>Sub Total</b>	<b>8,341</b>	<b>2,030</b>	<b>16,935</b>
<b>St James Centre, Edinburgh Way</b>			
Allied Carpets	812	1,353	1,099
Pets at Home	818	2,538	2,076
Staples	1,084	2,155	2,336
The Range	2,696	2,548	6,869
<b>Sub Total</b>	<b>5,410</b>	<b>2,288</b>	<b>12,381</b>
<b>Princes Gate Retail Park, Edinburgh Way</b>			
Go Outdoors	2,232	4,184	9,338
Paul Simon	717	2,548	1,826
Wickes Extra	3,925	2,445	9,597
<b>Sub Total</b>	<b>6,873</b>	<b>3,020</b>	<b>20,760</b>
<b>Stand-alone</b>			
Dreams, Princes Gate, Edinburgh Way	822	1,749	1,438
<b>EDINBURGH WAY TOTAL FLOORSPACE</b>	<b>45,373</b>	<b>3,020</b>	<b>160,098</b>
<b>HARLOW TOTAL FLOORSPACE</b>	<b>83,567</b>	-	-

Source: Experian Goad, Trevor Woods Database

## HARLOW RETAIL STUDY UPDATE 2010

Table 9: Comparison Goods Commitments

	Gross Floorspace (sqm)	Net Floorspace (sqm)	Net Comparison Ratio (%)	Net Comparison Floorspace (sqm)	Company Average Sales (£ per sqm net)	Average Turnover 2010 (£000)	Average Turnover 2015 (£000)	Average Turnover 2020 (£000)	Average Turnover 2025 (£000)	Average Turnover 2026 (£000)	Average Turnover 2031 (£000)
Unit 13 The Water Gardens (Former Woolworths) Mezzanine	513	359	100%	359	4,500	1,616	1,628	1,644	1,661	1,664	1,681
<b>HARVEY CENTRE</b>											
Demolition of Existing Floorspace	-	-10,673	100%	-10,673	7,000	-74,711	-75,273	-76,029	-76,792	-76,946	-77,718
New Floorspace	-	22,249	100%	22,249	5,500	122,370	123,290	124,528	125,778	126,030	127,295
HARVEY CENTRE TOTAL NET ADDITIONAL FLOORSPACE	-	11,576	-	11,576	-	47,659	48,017	48,499	48,986	49,084	49,577

## HARLOW RETAIL STUDY UPDATE 2010

Table 10: Harlow District Global Comparison Goods Capacity Projections without Harvey Centre Extention and no demolition of existing floorspace

Growth in sales per sqm (Sales Efficiency)	2010 - 2015 - 1.5% per annum 2015 - 2031 - 2% per annum					
	2010	2015	2020	2025	2026	2031
Total Available Expenditure (£000)	1,075,054	1,220,016	1,596,797	2,086,974	2,199,582	2,785,813
Market Share from Survey Area	44	44	44	44	44	44
Survey Area Residents Spending (£000)	471,581	537,646	706,489	927,547	978,093	1,239,407
Existing Retail Floorspace (sqm net)	83,567	83,567	83,567	83,567	83,567	83,567
Sales (£ per sqm net)	5,643	6,079	6,712	7,411	7,559	7,710
Sales from Existing Floorspace (£000)	471,581	508,027	560,903	619,282	631,668	644,301
Sales from Commitments (£000)	0	1,628	1,644	1,661	1,664	1,681
Residual Expenditure to support new floorspace (£000)	0	27,991	143,942	306,604	344,761	593,425
Sales per sqm net in new shops (£)	5,500	5,925	6,542	7,223	7,367	7,514
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>4,724</b>	<b>22,004</b>	<b>42,451</b>	<b>46,798</b>	<b>78,972</b>

## HARLOW RETAIL STUDY UPDATE 2010

Table 11: Harlow District Global Comparison Goods Capacity Projections with Harvey Centre Extention and Demolition of Existing Floorspace

Growth in sales per sqm (Sales Efficiency)	2010 - 2015 - 1.5% per annum 2015 - 2031 - 2% per annum					
	2010	2015	2020	2025	2026	2031
Total Available Expenditure (£000)	1,075,054	1,220,016	1,596,797	2,086,974	2,199,582	2,785,813
Market Share from Survey Area	44	44	44	44	44	44
Survey Area Residents Spending (£000)	471,581	537,646	706,489	927,547	978,093	1,239,407
Existing Retail Floorspace (sqm net) with Harvey Centre Demolition	83,567	83,567	83,567	83,567	83,567	83,567
Sales (£ per sqm net)	5,643	6,079	6,712	7,411	7,559	7,710
Sales from Existing Floorspace (£000)	471,581	508,027	560,903	619,282	631,668	644,301
Sales from Commitments (£000)	0	49,645	50,144	50,647	50,748	51,258
Residual Expenditure to support new floorspace (£000)	0	-20,026	95,442	257,618	295,677	543,848
Sales per sqm net in new shops (£)	5,500	5,925	6,542	7,223	7,367	7,514
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>-3,380</b>	<b>14,590</b>	<b>35,668</b>	<b>40,135</b>	<b>72,374</b>

## HARLOW RETAIL STUDY UPDATE 2010

Table 12: Harlow Town Centre Comparison Goods Capacity Projections without Harvey Centre Extension and no demolition of existing floorspace

Growth in sales per sqm (Sales Efficiency)	2010 - 2015 - 1.5% per annum 2015 - 2031 - 2% per annum					
	2010	2015	2020	2025	2026	2031
Total Available Expenditure (£000)	1,075,054	1,220,016	1,596,797	2,086,974	2,199,582	2,785,813
Market Share from Survey Area	24	24	24	24	24	24
Survey Area Residents Spending (£000)	256,533	292,217	383,616	503,378	530,753	672,483
Existing Retail Floorspace (sqm net)	38,195	38,195	38,195	38,195	38,195	38,195
Sales (£ per sqm net)	6,716	7,236	7,989	8,820	8,996	9,176
Sales from Existing Floorspace (£000)	256,533	276,359	305,122	336,880	343,617	350,490
Sales from Commitments (£000)	0	1,628	1,644	1,661	1,664	1,681
Residual Expenditure to support new floorspace (£000)	0	14,230	76,849	164,837	185,472	320,312
Sales per sqm net in new shops (£)	5,500	5,925	6,542	7,223	7,367	7,514
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>2,402</b>	<b>11,747</b>	<b>22,822</b>	<b>25,176</b>	<b>42,626</b>

## HARLOW RETAIL STUDY UPDATE 2010

Table 13: Harlow Town Centre Comparison Goods Capacity Projections with Harvey Centre Extention and Demolition of Existing Floorspace

Growth in sales per sqm (Sales Efficiency)	2010 - 2015 - 1.5% per annum 2015 - 2031 - 2% per annum					
	2010	2015	2020	2025	2026	2031
Total Available Expenditure (£000)	1,075,054	1,220,016	1,596,797	2,086,974	2,199,582	2,785,813
Market Share from Survey Area	24	24	24	24	24	24
Survey Area Residents Spending (£000)	256,533	292,217	383,616	503,378	530,753	672,483
Existing Retail Floorspace (sqm net)	38,195	38,195	38,195	38,195	38,195	38,195
Sales (£ per sqm net)	6,716	7,236	7,989	8,820	8,996	9,176
Sales from Existing Floorspace (£000)	256,533	276,359	305,122	336,880	343,617	350,490
Sales from Commitments including Harvey Centre Extension (£000)	0	49,645	50,144	50,647	50,748	51,258
Residual Expenditure to support new floorspace (£000)	0	-33,787	28,350	115,851	136,388	270,735
Sales per sqm net in new shops (£)	5,500	5,925	6,542	7,223	7,367	7,514
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>-5,702</b>	<b>4,334</b>	<b>16,040</b>	<b>18,513</b>	<b>36,029</b>

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## **APPENDIX 5**

### **TOWN CENTRE NORTH – ECONOMIC IMPLICATIONS**

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## HARLOW RETAIL STUDY UPDATE 2010

### HARLOW TOWN CENTRE WITH TOWN CENTRE NORTH

Table 1: Harlow Town Centre: Comparison Goods Allocation - % Market Share

Harlow Town Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
2010	39.2%	48.4%	39.6%	19.7%	38.1%	12.2%	8.0%	25.7%	14.7%	32.0%	13.6%
2015	39.2%	48.4%	39.6%	19.7%	38.1%	12.2%	8.0%	25.7%	14.7%	32.0%	13.6%
2020	49.0%	60.5%	45.6%	22.6%	43.8%	14.0%	9.2%	29.5%	16.9%	36.8%	15.7%
2025	49.0%	60.5%	45.6%	22.6%	43.8%	14.0%	9.2%	29.5%	16.9%	36.8%	15.7%
2026	49.0%	60.5%	45.6%	22.6%	43.8%	14.0%	9.2%	29.5%	16.9%	36.8%	15.7%
2031	49.0%	60.5%	45.6%	22.6%	43.8%	14.0%	9.2%	29.5%	16.9%	36.8%	15.7%

Source: Harlow Household Telephone Survey, June 2010

Table 2: Harlow Town Centre: Comparison Goods Allocation - Spend (£000) 2008 Prices

Harlow Town Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
2010	48,198	25,186	23,716	15,386	7,600	11,567	5,885	19,189	45,970	49,543	4,294	256,533
2015	56,627	29,044	27,251	17,552	8,571	13,098	6,716	21,694	51,788	55,138	4,739	292,217
2020	95,294	48,451	41,556	26,531	12,822	19,763	10,208	32,483	77,454	81,187	6,899	452,647
2025	127,867	64,829	54,924	34,742	16,835	25,831	13,413	42,268	100,390	104,444	8,744	594,287
2026	135,264	68,559	57,946	36,578	17,705	27,219	14,165	44,518	105,742	109,787	9,175	626,658
2031	171,947	87,124	73,462	46,279	22,375	34,467	17,976	56,343	133,841	138,678	11,570	794,063

Source: Tables 3 and 4



## HARLOW RETAIL STUDY UPDATE 2010

Table 3: Harlow Town Centre Comparison Goods Capacity Projections without Harvey Centre Extention and no demolition of existing floorspace

Growth in sales per sqm (Sales Efficiency)	2010 - 2015 - 1.5% per annum 2015 - 2031 - 2% per annum					
	2010	2015	2020	2025	2026	2031
Total Available Expenditure (£000)	1,075,054	1,220,016	1,596,797	2,086,974	2,199,582	2,785,813
Market Share from Survey Area	24	24	28	28	28	28
Survey Area Residents Spending (£000)	256,533	292,217	452,647	594,287	626,658	794,063
Existing Retail Floorspace (sqm net)	38,195	38,195	38,195	38,195	38,195	38,195
Sales (£ per sqm net)	6,716	7,236	7,989	8,820	8,996	9,176
Sales from Existing Floorspace (£000)	256,533	276,359	305,122	336,880	343,617	350,490
Sales from Commitments (£000)	0	1,628	1,644	1,661	1,664	1,681
Residual Expenditure to support new floorspace (£000)	0	14,230	145,880	255,746	281,377	441,892
Sales per sqm net in new shops (£)	5,500	5,925	6,542	7,223	7,367	7,514
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>2,402</b>	<b>22,300</b>	<b>35,409</b>	<b>38,194</b>	<b>58,806</b>

## HARLOW RETAIL STUDY UPDATE 2010

Table 4: Harlow Town Centre Comparison Goods Capacity Projections with Harvey Centre Extension and Demolition of Existing Floorspace

Growth in sales per sqm (Sales Efficiency)	2010 - 2015 - 1.5% per annum 2015 - 2031 - 2% per annum					
	2010	2015	2020	2025	2026	2031
Total Available Expenditure (£000)	1,075,054	1,220,016	1,596,797	2,086,974	2,199,582	2,785,813
Market Share from Survey Area	24	24	28	28	28	28
Survey Area Residents Spending (£000)	256,533	292,217	452,647	594,287	626,658	794,063
Existing Retail Floorspace (sqm net)	38,195	38,195	38,195	38,195	38,195	38,195
Sales (£ per sqm net)	6,716	7,236	7,989	8,820	8,996	9,176
Sales from Existing Floorspace (£000)	256,533	276,359	305,122	336,880	343,617	350,490
Sales from Commitments including Harvey Centre Extension (£000)	0	49,645	50,144	50,647	50,748	51,258
Residual Expenditure to support new floorspace (£000)	0	-33,787	97,381	206,760	232,293	392,316
Sales per sqm net in new shops (£)	5,500	5,925	6,542	7,223	7,367	7,514
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>-5,702</b>	<b>14,886</b>	<b>28,627</b>	<b>31,531</b>	<b>52,208</b>

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**APPENDIX 6**  
**LEISURE MODELLING**

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## **APPENDIX 6A**

### **CINEMA CAPACITY**

## HARLOW RETAIL STUDY UPDATE 2010

**TABLE 1 - EXISTING CINEMA PROVISION IN CATCHMENT AREA**

Cinema	No. Screens	No. Seats	% of Catchment Overlap	Screens Serving Borough
Cineworld, Queensgate Centre, Harlow	6	1,536	100	6.0
Cineworld, Enfield	15	3,392	20	3.0
Empire, Bishop's Stortford	6	1,237	30	1.8
Cineworld, Stevenage	16	3,013	5	0.8
<b>TOTAL</b>	<b>43</b>	<b>9,178</b>		<b>11.6</b>

SOURCE: Cinemagoing 18, Dodona Research, March 2009

## HARLOW RETAIL STUDY UPDATE 2010

TABLE 2 - SCREEN AND SEAT PROVISION

	Estimated Population (millions)	Number of Screens	Population per screen
<b><u>2010</u></b>			
UK	65.27	3,670	17,785
Within Catchment	0.383	11.6	33,017
<b><u>Forecasts 2015</u></b>			
UK	64.20	3,797	16,906
Within Catchment	0.398	11.6	34,310
<b><u>Forecasts 2020</u></b>			
UK	66.34	4,193	15,823
Within Catchment	0.414	11.6	35,690
<b><u>Forecasts 2025</u></b>			
UK	68.49	4,629	14,796
Within Catchment	0.431	11.6	37,155
<b><u>Forecasts 2026</u></b>			
UK	68.90	4,722	14,592
Within Catchment	0.434	11.6	37,414
<b><u>Forecasts 3031</u></b>			
UK	69.31	5,213	13,296
Within Catchment	0.437	11.6	37,672

SOURCE: Cinemagoing 18, Dodona Research, March 2009 / Experian Micromarketer, December 2010

## HARLOW RETAIL STUDY UPDATE 2010

**TABLE 3: CINEMA CAPACITY 2010**

		No of Screens Total
UK population per screen (2010)	17,785	
Population (Zones 1 & 2)	383,000	
Number if Harlow to match UK average		21.5
<b>Total number of screens needed 2010</b>		<b>9.9</b>

**TABLE 4: CINEMA CAPACITY 2015**

		No of Screens Total
UK population per screen (2015)	16,906	
Population (Zones 1 & 2)	398,000	
Number if Harlow to match UK average		23.5
<b>Total number of screens needed 2015</b>		<b>11.94</b>

**TABLE 5: CINEMA CAPACITY 2020**

		No of Screens Total
UK population per screen (2020)	15,823	
Population (Zones 1 & 2)	414,000	
Number if Harlow to match UK average		26.2
<b>Total number of screens needed 2020</b>		<b>14.56</b>

**TABLE 6: CINEMA CAPACITY 2025**

		No of Screens Total
UK population per screen (2025)	14,796	
Population (Zones 1 & 2)	431,000	
Number if Harlow to match UK average		29.1
<b>Total number of screens needed 2025</b>		<b>17.53</b>

## HARLOW RETAIL STUDY UPDATE 2010

**TABLE 7: CINEMA CAPACITY 2026**

		No of Screens Total
UK population per screen (2025)	14,592	
Population (Zones 1 & 2)	434,000	
Number if Harlow to match UK average		29.7
<b>Total number of screens needed 2026</b>		<b>29.74</b>

**TABLE 8: CINEMA CAPACITY 2031**

		No of Screens Total
UK population per screen (2025)	13,296	
Population (Zones 1 & 2)	437,000	
Number if Harlow to match UK average		32.9
<b>Total number of screens needed 2031</b>		<b>32.87</b>



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## **APPENDIX 6B**

### **LEISURE EXPENDITURE FORECASTS**

## HARLOW RETAIL STUDY UPDATE 2010

Table 1: Survey Area Population Forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
<b>2010</b>	47,719	21,612	21,737	25,244	6,828	31,661	24,053	25,149	111,938	55,930	10,806	<b>382,677</b>
<b>2015</b>	51,338	22,822	22,872	26,370	7,051	32,830	25,133	26,035	115,473	56,998	10,922	<b>397,844</b>
<b>2020</b>	54,998	24,234	24,136	27,575	7,298	34,257	26,433	26,968	119,512	58,081	11,005	<b>414,497</b>
<b>2025</b>	58,655	25,773	25,355	28,700	7,616	35,588	27,606	27,891	123,119	59,388	11,086	<b>430,777</b>
<b>2026</b>	59,263	26,032	25,549	28,861	7,650	35,817	27,845	28,057	123,861	59,624	11,111	<b>433,670</b>
<b>2031</b>	59,877	26,294	25,744	29,023	7,684	36,047	28,086	28,224	124,607	59,861	11,136	<b>436,584</b>

Source: Experian Business Solutions, May 2010

Table 1A: Population Growth Rates

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
<b>2010-2015 (%)</b>	7.6	5.6	5.2	4.5	3.3	3.7	4.5	3.5	3.2	1.9	1.1	4.0
<b>2010-2020 (%)</b>	15.3	12.1	11.0	9.2	6.9	8.2	9.9	7.2	6.8	3.8	1.8	8.3
<b>2010-2025 (%)</b>	22.9	19.3	16.6	13.7	11.5	12.4	14.8	10.9	10.0	6.2	2.6	12.6
<b>2010-2026 (%)</b>	24.2	20.5	17.5	14.3	12.0	13.1	15.8	11.6	10.7	6.6	2.8	13.3
<b>2010-2031 (%)</b>	25.5	21.7	18.4	15.0	12.5	13.9	16.8	12.2	11.3	7.0	3.1	14.1

Source: Experian Business Solutions, May 2010

Table 1B: Survey Area Postcodes

ZONE	POSTCODES
<b>1</b>	CM17 9, CM18 6, CM18 7, CM19 4
<b>2</b>	CM20 1, CM20 2, CM20 3
<b>3</b>	CM19 5, EN11 0, SG12 8
<b>4</b>	CM21 0, CM21 9, CM23 4, SG10 6
<b>5</b>	CM17 0
<b>6</b>	CM22 7, CM23 2, CM23 3, CM 23 5
<b>7</b>	CM22 6, CM32 1, CM24 1, CM24 8, CM6 1
<b>8</b>	SG11 1, SG11 2, SG12 0, SG12 7
<b>9</b>	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
<b>10</b>	CM16 4, CM16 5, CM16 6, CM16 7, EN9 1, EN9 2, EN9 3, IG10 2
<b>11</b>	CM5 0, CM5 9

## HARLOW RETAIL STUDY UPDATE 2010

### LEISURE EXPENDITURE FORECASTS

**TABLE 2**  
**PER CAPITA LEISURE EXPENDITURE (2008 PRICES) (GROWN BY 2.1% PA)**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
2008	1,808	1,717	1,873	2,094	1,956	2,052	2,032	2,000	1,905	1,891	1,918
2010	1,885	1,790	1,952	2,183	2,039	2,139	2,118	2,085	1,986	1,971	1,999
2015	2,091	1,986	2,166	2,422	2,262	2,373	2,350	2,313	2,203	2,187	2,218
2020	2,320	2,203	2,404	2,687	2,510	2,633	2,608	2,566	2,445	2,427	2,461
2025	2,574	2,445	2,667	2,981	2,785	2,922	2,893	2,848	2,712	2,692	2,731
2026	2,628	2,496	2,723	3,044	2,843	2,983	2,954	2,907	2,769	2,749	2,788
2031	2,916	2,769	3,021	3,377	3,155	3,310	3,277	3,226	3,072	3,050	3,093

SOURCE: Experian Micromarketer, 2010

**TABLE 3**  
**TOTAL SURVEY AREA LEISURE EXPENDITURE (2008 PRICES)**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
2010	89,938	38,683	42,441	55,104	13,922	67,726	50,950	52,433	222,292	110,252	21,606	<b>765,347</b>
2015	107,354	45,321	49,548	63,866	15,951	77,916	59,067	60,224	254,423	124,661	24,229	<b>882,560</b>
2020	127,601	53,395	58,011	74,097	18,318	90,206	68,925	69,213	292,156	140,940	27,086	<b>1,019,950</b>
2025	150,988	63,005	67,614	85,565	21,210	103,973	79,867	79,420	333,932	159,892	30,273	<b>1,175,738</b>
2026	155,756	64,974	69,562	87,852	21,752	106,839	82,250	81,571	342,999	163,899	30,979	<b>1,208,433</b>
2031	174,603	72,814	77,770	98,019	24,241	119,301	92,046	91,042	382,852	182,569	34,449	<b>1,349,707</b>

SOURCE: Tables 1 and 2

## HARLOW RETAIL STUDY UPDATE 2010

### CAFÉ AND RESTAURANT EXPENDITURE FORECASTS

**TABLE 4**  
**PER CAPITA CAFÉ AND RESTAURANT EXPENDITURE (2008 PRICES) (GROWN BY 2.1% PA)**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
2008	1,040	995	1,085	1,217	1,129	1,202	1,173	1,159	1,108	1,097	1,100
2010	1,084	1,037	1,131	1,269	1,177	1,253	1,223	1,208	1,155	1,144	1,147
2015	1,203	1,151	1,255	1,408	1,306	1,390	1,357	1,340	1,282	1,269	1,272
2020	1,335	1,277	1,392	1,562	1,449	1,542	1,505	1,487	1,422	1,408	1,412
2025	1,481	1,417	1,545	1,733	1,607	1,711	1,670	1,650	1,578	1,562	1,566
2026	1,512	1,446	1,577	1,769	1,641	1,747	1,705	1,685	1,611	1,595	1,599
2031	1,677	1,605	1,750	1,963	1,821	1,939	1,892	1,869	1,787	1,769	1,774

SOURCE: Experian Micromarketer, 2010

**TABLE 5**  
**TOTAL SURVEY AREA CAFÉ AND RESTAURANT EXPENDITURE (2008 PRICES)**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	TOTAL
2010	51,734	22,417	24,586	32,026	8,036	39,672	29,412	30,385	129,291	63,959	12,391	<b>443,907</b>
2015	61,752	26,264	28,702	37,118	9,207	45,641	34,097	34,900	147,979	72,318	13,896	<b>511,874</b>
2020	73,399	30,943	33,605	43,064	10,573	52,840	39,788	40,109	169,926	81,762	15,534	<b>591,543</b>
2025	86,851	36,511	39,168	49,729	12,242	60,904	46,104	46,024	194,224	92,756	17,362	<b>681,876</b>
2026	89,594	37,653	40,296	51,058	12,555	62,583	47,480	47,270	199,498	95,080	17,767	<b>700,834</b>
2031	100,436	42,195	45,051	56,967	13,992	69,883	53,135	52,759	222,677	105,911	19,757	<b>782,763</b>

SOURCE: Tables 1 and 4