Retail Study and Town Centre Health Check

Harlow District Council

July 2007

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PLANS:

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1. INTRODUCTION

1.1 GVA Grimley LLP was instructed by Harlow District Council in 2006 to undertake a District-wide Retail Study and Town Centre Health Check. The purpose of this study is to inform and guide retail planning in the District and specifically to help inform the preparation of the Council's Local Development Framework (LDF).

1.2 One of the key objectives of the study is to identify the quantitative (capacity) need and qualitative need for additional leisure and retail development in the District up to 2011 and 2016. The other main objectives set out in the Council's Brief are to:

- Establish the extent to which the current retail provision in the District satisfies the level and nature of consumer demand within each catchment;
- Understand the catchment and roles of the Town Centre, Neighbourhood Centres and Hatches;
- Identify the scale and nature of additional retail provision that may be appropriate in the District;
- Assess the scope for new retail development and the potential to accommodate this within the District.

1.3 In order to address the requirements of the Brief, our methodology incorporates a comprehensive up to date review of retailing needs in the District. We have drawn on a Household Telephone Survey specifically commissioned for this study to help provide an up-to-date indication of the relative role, function and attraction of the District's smaller Neighbourhood Centres and Hatches.

1.4 Our study has also been prepared in conjunction with the Town Centre Strategy prepared for the Council and English Partnerships (EP) by David Locke Associates and CB Richard Ellis (CBRE). We have specifically drawn on the findings of the re-commissioned household telephone interview survey carried out during December 2006 and January 2007. This survey has helped to inform and identify broad shopping patterns and market shares for comparison and convenience goods retailing across a wider study area.

1.5 We have also carried out detailed healthchecks of Harlow town centre, the Neighbourhood Centres and Hatches. Our audits and assessments specifically draw on the performance indicators set out in PPS6 (Chapter 4). These detailed centre assessments inform the quantitative retail need assessment and help to highlight, amongst other issues, the extent of deficiencies in the range, choice and distribution of existing provision in the District's main centres.

1.6 This study also comprises a high level assessment of the opportunities to accommodate further new retail development in the District's main centres, and provides advice on the suitability, viability and availability of sites identified in partnership with the Council for new development. The results of the full analysis are drawn together to highlight our key conclusions to inform the forthcoming LDF.

Report Structure

1.7 This report is structured as follows:

1.8 Section 2 sets out a brief review of national, strategic and local planning policies relevant to retail planning and town centres.

1.9 Section 3 describes some of the more significant current national and regional trends in retailing, and focuses on the likely implications for retailing in the District and its main centres.

1.10 In Section 4 we review the sub-regional context. This looks in particular at the influence of competing centres in the wider sub-region on Harlow town centre's role, function and attraction as a shopping and leisure destination. It also highlights potential changes and influences on the future role of Harlow town centre.

1.11 Sections 5, 6 and 7 set out our detailed healthchecks of the Town Centre, Neighbourhood Centres and Hatches respectively.

1.12 In Section 8 we describe the key assumptions and findings of our quantitative need assessment. This sets out the potential capacity for new comparison and convenience goods retail floorspace in the District over the forecast period.

1.13 Section 9 examines key town centre uses other than retail, namely commercial leisure and offices.

1.14 In Section 10 we look at opportunities for further development and/ or redevelopment across the district and finally Section 11 draws together the key implications of our quantitative and qualitative reviews to identify the key findings and recommendations for the future.

2. POLICY FRAMEWORK

2.1 In this section, we examine the key planning policy guidance relevant to retailing and town centre development at the national, regional and local level. This provides the context for our study.

PPS1: Delivering Sustainable Development

2.2 Planning Policy Statement 1 (PPS1) was published in February 2005 and sets out the overarching planning policies on the delivery of sustainable development through the planning system. The guidance confirms that sustainable development is the core principle underpinning planning, clarifying that the concept is a simple idea of ensuring a better quality of life for everyone now and for future generations.

2.3 The Government makes clear that planning should facilitate and promote sustainable and inclusive patterns of urban and rural development through a number of initiatives, including the need to ensure that new developments provide good access to jobs and key services for all members of the community. In promoting sustainable development, the Government reaffirms through the guidance that, amongst other things, the planning system needs to:

- Recognise that economic development can deliver environmental and social benefits;
- Make suitable land available for development in line with economic, social and environmental objectives - ensuring that suitable locations are available for industrial, commercial, retail, public sector, tourism and leisure development, so that the economy can prosper;
- Promote urban and rural regeneration to improve the well being of communities, improve facilities, promote high quality and safe development and create new opportunities for the people living in those communities. Promote mixed use developments for locations that allow the creation of linkages between different uses and can thereby create more vibrant places;
- Provide improved access for all jobs, health, education, shops, leisure and community facilities, open space, sport and recreation, by ensuring that new development is located where everyone can access services or facilities on foot, bicycle or public transport rather than having to rely on access by car, while recognising that this may be more difficult in rural areas;
- Promote the more efficient use of land through higher density, mixed use development and the use of suitably located previously developed land and buildings. Bring vacant and underused previously developed land and buildings back into beneficial use to

achieve the targets the Government has set for development on previously developed land.

PPS6: Planning for Town Centres

2.4 PPS6 was published in March 2005 and covers retail planning and town centres. It states that the Government's key objective is to promote the vitality and viability of centres by planning for their growth and development; focusing development in centres; and encouraging a wide range of services in a good environment, accessible to all. Other Government objectives include:

- Enhancing consumer choice by making provision for a range of shopping, leisure and local services, which allow genuine choice to meet the needs of the entire community, and particularly socially excluded groups;
- Supporting efficient, competitive and innovative retail, leisure, tourism and other sectors, with improving productivity; and
- Improving accessibility, ensuring that existing or new development is, or will be, accessible and well served by a choice of means of transport.

2.5 PPS6 states that local planning authorities should actively plan for growth and change in town centres over the period of their development plan documents by:

- Selecting appropriate existing centres to accommodate the identified need for growth:
- Making better use of existing land and buildings, including where appropriate, redevelopment;
- extending the centre, where necessary;
- Managing the role and function of existing centres by, for example, promoting and developing a specialist or new role and encouraging specific types of uses in some centres; and
- Planning for new centres of an appropriate scale in areas of significant growth or where there are deficiencies in the existing network of centres.

2.6 Where possible the guidance states that growth should be accommodated by more efficient use of land and buildings within existing centres. Local planning authorities should aim to increase the density of development, where appropriate. Opportunities within existing centres should be identified for sites suitable for development or redevelopment or where conversions and change of use will be encourage for specific buildings or areas. Local planning authorities should also seek to ensure that the number and size of sites identified for development or redevelopment are sufficient to meet the scale and type of need identified.

2.7 Where growth cannot be accommodated in identified existing centres, local planning authorities should plan for the extension of the primary shopping area if there is a need for additional retail provision or, where appropriate, plan for the extension of the town centre to accommodate other main town centre uses.

2.8 Where existing centres are in decline, PPS6 states that local planning authorities should assess the scope for consolidating and strengthening these centres by seeking to focus a wider range of services there, promote the diversification of uses and improve the environment. Where reversing decline is not possible, local planning authorities should recognise that these centres may need to be reclassified at a lower level within the hierarchy of centres, and reflect this revised status in the policies applied to the area.

2.9 It is not necessary to demonstrate the need for retail proposals within the primary shopping area of a town centre. This is designed to ensure planning constraints on town centre schemes are less onerous. In reality, a need assessment is likely to be required on larger schemes to enable an informed judgement in relation to the scale and impact of development. Need must be demonstrated for any application for a main town centre use, including retail, which would be in an edge-of-centre or out-of-centre location.

2.10 In terms of the sequential approach, site selection should be applied to all development proposals for sites that are not in an existing centre, nor allocated in an up-to-date development plan document. The sequential approach requires that locations are considered in the following order:

- First, locations in appropriate existing centres where suitable sites or buildings for conversion are, or are likely to become, available within the development plan document period, taking account of an appropriate scale of development in relation to the role and function of the centre;
- Edge-of-centre locations, with preference given to sites that are or will be well connected to the centre;
- Out-of-centre sites, with preference given to sites which are or will be served by a choice of means of transport and which are close to the centre and have a high likelihood of forming links with the centre.

2.11 PPS6 states that impact assessment should always be undertaken for applications in an edge-of-centre or out-of-centre location and which is not in accordance with a development plan strategy. An application for a significant development in a centre, not in accordance with the development plan strategy, and which would substantially increase the attraction of the centre and could have an impact on other centres, the impact on other centres will also need to be assessed.

2.12 In terms of the appropriate scale of development, local planning authorities should ensure that the scale of opportunities identified are directly related to the role and function of the centre and its catchment. The aim should be to locate the appropriate type and scale of development in the right type of centre, to ensure that it fits into that centre and that it compliments its role and function in the defined retail hierarchy.

2.13 In assembling sites, PPS6 states that in planning for growth in town centres, local planning authorities should allocate sufficient sites to meet the identified need for at least the first five years from the adoption of their development plan documents, although for large town centre schemes a longer period may be appropriate to allow for site assembly. Local planning authorities should consider the scope for site assembly using their compulsory purchase powers, to ensure that suitable sites within or on the edge-of-centres are brought forward for development, including sites that are under-utilised, such as car parks and single storey buildings, which could be redeveloped for multi storey, mixed use development.

Mezzanine Floorspace and Extensions

2.14 During the passage of the Planning and Compulsory Purchase Act 2004, the Government agreed to an amendment (now Section 49) which brought under planning control the creation of additional floorspace within buildings. This amendment was in response to concerns that the development of mezzanine floors in large retail stores significantly increased the available floorspace, thereby undermining the objectives of planning policy for the regeneration of town centres. For example, where development takes place in an out-of-centre location and there isn't the need for additional floorspace or sequentially preferable opportunities for development exist.

2.15 The provision incorporated within the 2004 Act does not seek to prevent such development, but to allow authorities to determine such proposals, in the same way as they would for store expansion involving an external expansion of floorspace, which would require planning permission. The proposals will apply only to increases in internal gross floor space above 200 sq m gross, to prevent smaller, town centre businesses from being adversely affected.

Regional Spatial Strategy for the East of England

2.16 Regional policy for the Harlow sub-region is set out in the Draft Revision to the Regional Spatial Strategy for the East of England (RSS), December 2004. The RSS was the subject of an Examination in Public, for which the panel report was issued in June 2006. The Secretary of State then published proposed changes to the Draft in December 2006. A public consultation on these on the proposed changes was carried out up to March 2007.

(i) General Spatial Policies

2.17 **Policy SS1** sets out how the Plan seeks to achieve sustainable development. The Spatial Strategy aims to achieve sustainable development by applying the guiding principles of the UK Sustainable Development Strategy 2005. In particular, the spatial strategy seeks to ensure that development maximises the potential for people to form more sustainable relationships between their homes, workplaces, and other concentrations of regularly used services and facilities, and their means of travel between them; and respects environmental limits by seeking net environmental gains wherever possible, or at least avoiding harm.

2.18 **Policy SS2** sets out the overall approach to the spatial strategy. It seeks to direct strategically significant growth to the region's major urban areas. The main strategy is to concentrate development at the region's cities and other significant urban areas including selected market towns. **Policy SS3** identifies Harlow as a key centre for development and change.

2.19 **Policy SS5 (Priority Areas for Regeneration)** identifies Harlow as an area with significant deprivation where LDDs should set out policies to tackle economic, social and environmental deprivation.

2.20 **Policy SS6** states that thriving, vibrant and attractive town centres are fundamental to the sustainable development of the East of England and should continue to be the focus for new investment, environmental enhancement and regeneration. Within the context of a community strategy approach, LDDs will need to:

- Define the role of each centre.
- Include a strategy for each town centre to promote successful mixed use economies, manage change, refocus where necessary and support cultural heritage.
- Protect and enhance existing Neighbourhood Centres and, where a need is established, promote new provision of an appropriate scale and function to meet local day to day needs.

- Ensure land is allocated to meet the full range of identified needs.

(ii) Economic Development and Retail

2.21 **Policy E5 combines previous policies E9 and E10** and sets out the following regional structure of retail centres:

- **Major regional centres:** Basildon, Cambridge, Colchester, Chelmsford, Ipswich, Norwich, Peterborough, Southend and Watford.
- **Regional centres:** Bedford, Bury St Edmunds, Great Yarmouth, Harlow, Hemel Hempstead, King's Lynn, Lowestoft, Luton, St Albans, Stevenage and Welwyn Garden City.
- **Other towns and market towns**: LDDs will define the towns and market towns which comprise the structure of main retail centres within their areas.
- **Villages and local centres:** LDDs will define the villages and local centres that complete the structure of retail provision within their areas.

2.22 It states that:

- New retail development and complementary town centre uses should primarily be located in the above centres and be consistent in scale with the size and character of the centre and its role in the regional structure.
- LDDs will propose a higher order provision only where a need is clearly established and development would results in a more sustainable pattern of development and movement including a reduction in the need to travel.
- Have no significant harmful impact on other centres.
- LDDs will consider the role of retail within priority areas for regeneration and propose development and enhancement to implement regeneration strategies.

2.23 The supporting text states that the designation of centres in Policy E5 is not expected to require review for the foreseeable future. However, it notes that significant growth in retail will be needed in response to growth in population and expenditure per capita. Additional provision may also be needed where major regeneration or housing growth is planned.

2.24 **Policy E6 replaces Policy E12** and relates to out-of-centre retail. It states that there is no need for any additional regional out-of-centre shopping centres in the plan period. LDDs should define the future roles of these centres, in particular to determine whether they should remain purely retail centres or, alternatively, develop into centres with a fuller range of service provision. This approach should only be adopted where this would improve social, environmental and economic sustainability and deliver improved sustainable transport accessibility, particularly by public transport.

(iii) The Secretary of State's Proposed Changes to the Draft Revision

2.25 Other key recommendations to the Draft RSS include:

- there is no need for an extensive sub-regional strategy for the Stansted/M11 area;
- Harlow should be dealt with as a 'regional growth point'.
- there is a need for significant additional housing in Harlow and that growth is required to support regeneration priorities for the town.
- the inclusion of a policy for Harlow as a key centre for development and change in the sub-regional chapter of the East of England Plan.

2.26 Under the Planning & Compulsory Purchase Act 2004, the Essex and Southend-on-Sea Replacement Structure Plan will remain the operative development plan for Essex until 2007. The Structure Plan and its policies are therefore 'saved' for three years, unless the East of England Regional Plan is adopted sooner. Once the East of England Plan is adopted, the Structure Plan policies will be repealed and will have no effect. In the Structure Plan Harlow is designated as a sub-regional town centre, the highest order of centre defined.

Replacement Harlow Local Plan

2.27 The Replacement Harlow 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 polices contained in the Plan are saved for the purposes of the Act for three years from 13th July 2006.

2.28 Chapter 12 of the Plan *'Regenerating the Town Centre and Shopping'* sets out the Council's policies for sustaining and enhancing the vitality and viability of its town centres, neighbourhood centres and hatches. The Council's objectives in relation to regenerating the town centre and shopping in Harlow 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 a diversity and quality of 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.

2.29 A key objective of the Plan is to assess the location of new retail developments in a sequential manner, favouring town centre sites first. It states that proposals that are on the edge of town or out of centre locations, and are not in accordance with development plans, are required to demonstrate a need for additional facilities and that a sequential approach has been applied.

2.30 Policy **RTCS1** specifically 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 deciding whether it should be accommodated at successively lower levels in the hierarchy"*. Policy RTCS1 also states that development must be *"appropriate to the function, size and character of the centre concerned"*.

2.31 Another key objective is to sustain and enhance the vitality and viability of the neighbourhood centres and hatches and ensure their position in Harlow's shopping hierarchy. Policy **RTCS2** sets out five criterion against which retail development proposals should be assessed. The first states that retail development proposals should not: *"individually, or cumulatively with other recent and committed development, materially affect the vitality and viability of the existing town centre, neighbourhood centres or hatches"*. The fifth criterion states the proposals should promote: *"high standards of design and not cause unreasonable loss of amenity to adjoining land uses".*

2.32 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 Regeneration (PAR), by providing employment and through urban regeneration. Policies **RTCS3 – RTCS4** relate to the need to maintain and enhance the role of the town centre through new development.

2.33 Policies **RTCS5 - RTCS9** specifically relate to the potential regeneration and development of Town Centre South (TCS), Town Centre Central (TCC) and Town Centre North (TCN). Currently a strategy for TCN is being prepared to help secure the development of this area.

2.34 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 (para. 12.13.2). **Policies RTCS14** and **RTCS15** identify the five Neighbourhood Centres and 18 Hatches that form the retail hierarchy in Harlow.

2.35 The Plan seeks to retain key facilities that are already present in the neighbourhood centres and hatches. **Policy RTCS16** specifically states that planning permission will be granted for proposals that will strengthen and maintain the role of the neighbourhood centres and hatches by:

> *"1. Improving the range and quality of facilities appropriate for the size of the centre to meet the needs of the local population;*
>
> *2. Retaining and increasing residential accommodation above shops and on previously developed land where appropriate;*
>
> *3. Managing road traffic and improving facilities for passenger transport users, pedestrians, cyclists and those with special needs, and providing car parking where appropriate;*
>
> *4. Supporting the enhancement of the neighbourhood centres and hatches and ensuring new development is of a high design quality;*
>
> *5. Improving facilities for disabled people, elderly people and carers with babies and children;*
>
> 6. *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"*

2.36 **Policy RTCS17** seeks to ensure that key facilities and an adequate number of shops are retained in Neighbourhood Centres and Hatches. Policy **RTCS18** specifically encourages proposals for the improvement of both The Stow and Bush Fair neighbourhood centres. It states that any proposal for the redevelopment of parts of the centre or in full will be considered. It also makes it clear that proposals should not result in the loss of key facilities that contribute to the range or offer or act as anchors or catalysts which assist in retaining existing or attracting new operators in the neighbourhood centre. Such key facilities are referred to as including supermarket, general grocery store, chemist, newsagent, Post Office, pub, library, health centre and community centre (para. 12.13.3).

2.37 The Harlow Civic Society subsequently objected to the partial or total redevelopment of The Stow on grounds that it was Harlow's first neighbourhood centre and occupies an important part of the town's architectural heritage as an outstanding example of a post-war new town. The Inspector commented that The Stow was an excellent example of a 1960s new town neighbourhood centre and, whilst perhaps a *"little 'tired' in parts, appears to be thriving"* (Inspector's Report, paragraph 12.17.3). Policy RTCS18 has been subsequently revised by the Council in its Proposed Modifications, as follows:

> *"Proposals for the improvement and, if shown to be necessary, partial redevelopment of The Stow and/or Bush Fair Neighbourhood Centres will be favourably considered. All proposals must respect the existing character of the Centres, and their position in the architectural heritage of Harlow. Exceptionally, proposals for the full redevelopment of the Centres will be favourably considered. Proposals should not result in the loss of key facilities that contribute to the range of offer or that act as anchors or catalysts which assist in retaining existing or attracting new operators in the neighbourhood centre."*

2.38 The plan also identifies Neighbourhood Service Areas which are covered by policies **ER7** and **ER10** 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 encourage.
- 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.

2.39 The plan also notes that there is potential to redevelop some of the Hatches for mixed-use, retail, business and residential uses, this may involve developing small areas of land adjacent to the Hatches. Proposals should not result in the loss of key facilities or anchors. The Plan states that shops and facilities such as schools, a community centre, health services, a public house, library, church, etc will be required at New Hall to support local residents.

Summary

2.40 Government guidance makes clear that sustainable development is the core principle underpinning planning. Accordingly PPS1 sets out a range of overarching policies aimed at facilitating sustainable patterns of urban and rural development through a number of initiatives, including the need to ensure that new developments provide good access to jobs and key services for all members of the community.

2.41 PPS6 reaffirms the Government's commitment to maintaining and enhancing town centres. Accordingly the central objective of the guidance is to promote the vitality and viability of town centres by planning for the growth of existing centres and enhancing existing centres by promoting them as the focus for new development. Where growth cannot be accommodated in identified existing centres, local planning authorities should plan for an extension to the primary shopping area. It makes clear that where reversing the decline in centres is not possible, local authorities should consider reclassifying such centres within the retail hierarchy.

2.42 In allocating sites and assessing proposed development, PPS6 requires local planning authorities to assess the need for the development; identify the appropriate scale; apply the sequential approach; assess the impact on existing centres; and ensure locations are accessible and well served by a choice of means of transport. Local planning authorities after considering these factors, should consider the degree to which other considerations such as physical regeneration, employment, economic growth and social inclusion are relevant.

2.43 PPS12 sets out the Government's policies on the preparation of local development documents which will comprise the Local Development Framework. PPS12 indicates that the statutory development plan documents will include a Core Strategy, site specific allocations and Area Action Plans.

2.44 Regional Planning Policy recognises that there is a need for significant additional housing in Harlow, and that growth is required to support regeneration priorities for the town. Harlow is a key centre for development and change in the East of England Plan. It is a regional centre where major new retail development will be located.

2.45 At the local level, clear objectives are set out to regenerate Harlow town centre and its retail offer to promote a diversity of town centre uses and to improve the physical environment. Following the development of The Water Gardens at Town Centre South, the Council is progressing plans to redevelop the north of the town centre and the local plan encourages entertainment, leisure, food, drink and residential uses in this area.

2.46 In addition to the need to improve the retail and leisure offer, the Local Plan notes that there is a need to promote environmental improvements in the town centre including physical linkages, pedestrian movement, trees and landscaping, public squares and servicing arrangements.

2.47 In addition to the town centre, the Local Plan seeks to strengthen and maintain the role of Harlow's Neighbourhood Centres and Hatches by improving the range and quality of facilities and retaining key facilities. In particular, the local plan supports the improvement of The Stow and Bush Fair Neighbourhood Centres and acknowledges that there is potential to redevelop some of the Hatches for mixed-use, retail, business and residential uses.

3. RETAIL TRENDS

3.1 This section examines key trends and drivers for change in the retail industry. We outline the key national trends in retailing and service provision of relevance to the District drawing from a range of published data sources, including research by Verdict Analysis, Mintel and the New Economics Foundation.

i) Income and Expenditure

3.2 The retail sector has seen significant changes over the last 25 years, which have fundamentally altered the way we shop. One of the main drivers behind change has been the growth in incomes and expenditure. Consumer retail expenditure per head over the last 25-30 years has grown at an average compound rate of about 3% per annum in real terms, but most of this growth has been in comparison goods, with virtually no increase in convenience goods expenditure.

3.3 Over the last 25-30 years comparison goods expenditure per head has shown growth of nearly 5% per annum in real terms, (i.e. an overall increase of over 200% in real terms over the last 25 years). In contrast, convenience goods expenditure per head has increased at less than 1% per annum in real terms. Over the last 15-20 years even stronger growth has occurred, particularly in recent years. Such very strong expenditure growth trends are unlikely to continue, but reasonably strong growth in line with long term trends appears probable over the medium-long term.

3.4 Strong income and expenditure trends have also affected retailing in another important way – the rise in car ownership and mobility. Over the last 25 years the number of households owning one or more cars has increased from about 55% to about 75%. Equally significant, the number of households with two or more cars has nearly trebled from 11% to 30%. Households are now much more mobile than they used to be and therefore their choices for shopping centres to visit and the distances they can travel are much greater.

ii) Out-of-Town Retailing

3.5 Over the past 10 years, out-of-town has been the engine of retail growth. While retail sales as a whole increased by 62.1%, sale of out-of-town (OOT) stores grew nearly twice as fast, at 118%. OOT retail parks have provided retailers with larger, lower cost units than in town centre locations and they have used this opportunity to broaden their product offer and drive down prices. It has been a winning formula not just for grocers' superstores and bulky goods retailers but also, if carefully applied, for a growing number of high street retailers.

3.6 The Government's town centre first policy has resulted in a slowdown in OOT development over recent years. In 2003, for example, space grew by only 4.4% - the lowest growth rate on record. As a consequence, many OOT retailers are becoming more innovative and flexible in terms of in-store design, in-store merchandising and, in many cases, customer service.

3.7 Verdict expect OOT retail sales to grow by an average of 5.2% per year over the next five years, a slowdown from 6.7% per year over 1998-2003 as a shortage of new sites and cost increases force retailers to place greater emphasis on improving sales growth in existing stores, which they expect to increase from 1.4% to 2.4% per year. Assuming that the town centres 'first' policy is not 'watered down', then it is reasonable to expect a slow down in OOT sales growth and a strengthening in the performance and growth of town centre schemes.

3.8 Nevertheless, Verdict expect OOT retail sales to experience an overall growth of 28.9% over the next five years, which is still considerably faster than retail spending as a whole, albeit a slower rate than OOT achieved over the past five years.

3.9 In terms of individual sectors, Verdict expect DIY to be the fastest growing OOT sector, with sales up 39.2% over the next five years. Clothing and footwear is forecast to be the second fastest growing OOT sector as retailers take up more units on shopping parks to take advantage of more spacious accommodation and open A1 conditions in certain cases. This trend is reflected on a number of retail warehouse parks where clothing and general merchandising retailers, including Next, Boots, Gap, Borders, Peacocks and Carphone Warehouse, are becoming increasingly common. General merchandise retailers are also forecast to grow strongly (35.4% over the next five years), in particular Argos. Electrical retailers are expected to grow by 35.3% driven by demand for new technologies such as LCD TVs and recordable DVDs.

3.10 According to Verdict, Grocers' OOT sales will grow more slowly than other sectors but it will remain the largest sector accounting for 65.5% of all OOT sales. This rate of growth is much faster than the 15.4% growth expected in spending on food due to the increasing quantity of space at grocers' large OOT stores devoted to non-food products – where demand is growing more strongly. This is reflected by the increase in applications over recent years for extensions and mezzanine floors.

iii) Town Centre/High Street Retailing

3.11 Despite the growth of OOT retailing, high street retailers (including those in shopping centres) achieved a market share of circa 49.1% of the money spent by consumers on retail in 2003/04, which was only fractionally down on its 50.8% share of 10 years ago. While OOT sales have grown significantly, and online retailing is also now taking a growing share of the market, it is convenience goods retailers located in neighbourhood and smaller centres that have borne the brunt of this migration of shoppers and not the high street.

3.12 Deflation has become a major issue for retailers on the high street. In 1993-98, high street retailers experienced average annual inflation selling prices of 2.4%, but over the last five years there has been deflation of 0.7%. Several factors have contributed to deflation, including aggressive price competition from OOT retailers creating a growing price differential with their high street rivals. But OOT competition is not the only explanation; on the high street itself, new low cost retail models such as Primark, Savers and Wilkinson are able to challenge established retailers like M&S, Boots and Woolworths.

3.13 The High Street has become a high cost location. A shortage of units in prime locations has put upward pressure on already high rents, employment, insurance and distribution/servicing costs are rising, as are tax burdens for retailers signing new leases. Despite these difficulties many high street retailers are thriving. The thrivers (Argos, Debenhams, HMV, John Lewis and Next) have managed to grow sales by 62.8% or £4.2 billion over the last five years, while the strugglers (Bhs, Boots, Dixons, House of Fraser and M&S) have only achieved a 12% or £1.5 billion uplift in sales. The most important ingredient for reinforcing margins appears to be a distinctive product offer.

3.14 Perhaps the most encouraging indicator of the long term health of the high street is the strong pipeline of new developments over the next five years. As planning consent for OOT sites has become harder to gain, developers have switched their attention back to the city centre. There is a strong pipeline of new retail floorspace across the UK up to 2012. Many of these schemes have taken years to receive approval and will provide much needed revitalisation of many towns and cities.

iv) Changes in Number and Size of Shop Units

3.15 National retail trends indicate a continuing contraction in the number of shop units. Total store numbers in the UK have declined by 11% over the last 10 years. This masks variations in the decline of different types of stores and different locations. For example, the growth of superstores during the 1990s, has resulted in a decline in the number of smaller and more specialist food retailers.

3.16 Over the last decade, leading supermarket multiples have increased their share of the grocery market from 30% in 1992 to just over 60% in 2007. In Harlow District, for example, Tesco's at Church Langley and Edinburgh Way; Asda at the Water Garden and Sainsbury's at Fifty Avenue illustrate this trend.

3.17 Certain specialists have suffered more than others, including butchers and fishmongers. Greengrocers, bakers and other specialists have been slightly more robust, yet all three have lost market share. While Harlow's Neighbourhood Centres will need to maintain and enhance their roles as more local 'top up' shopping destinations, they face further threats to their overall vitality and viability from applications for new foodstores and/or extensions in out-of-centre and edge-of-centre locations.

v) Retail Polarisation

3.18 There has been a sustained fall in the pipeline for OOT shopping centre and retail park development over recent years as planning policy 'bites'. A corresponding resurgence in activity has been mainly concentrated into a few large schemes in dominant regional centres. The top 70 centres in the country now attract over 50% of the country's population for comparison goods shopping. Almost half of the shopping centre floorspace in the pipeline is destined for these same 70 centres, which will further reinforce their dominant market share.

3.19 The growth of multiple traders and increased competition between traders has meant that the retail structure is increasingly dominated by large companies. At the same time multiple traders have increased requirements for larger shop units. Shopping centres which have been able to accommodate this demand for larger sized units (typically 500-2,000 sq m or larger in the largest centres) have grown in importance (leading to polarisation in the retail hierarchy). The growth in car ownership and mobility, coupled with increased affluence, has led to shoppers travelling greater distances to shop in larger centres with a strong retail offer.

3.20 This concentration of retailing in larger centres is likely to threaten smaller towns unless they are able to secure new development of sufficient critical mass and quality to retain expenditure in the District, generate new inflows and attract key retailers.

vi) Convenience Retailers

3.21 The leading foodstore operators are continuing to innovate to increase their market share. Some have developed smaller store formats such as Tesco Metro and Sainsbury's Local and have been more innovative in their town centre proposals. Discount retailers are also looking to expand their networks. There has also been a growth in 'forecourt' retailing, operated either by the large supermarket chains or the major oil companies. These could represent opportunities to extend the convenience offer of both neighbourhood Centres and Hatches.

3.22 In the past five years supermarket multiples have strengthened their hold on the UK grocery market, taking share from most other operators in the process. Independent and smaller chains of grocers and convenience stores have been the key losers and acquisition targets.

All food specialists have come under pressure while off-licences have also suffered from the growing 'beer, wine and spirits' offer of both major grocers and convenience stores.

3.23 The growing share of the supermarket multiples has primarily been driven by the performance of four players – Tesco, Asda, Morrisons and the Co-op, which between them have put 9.8% on their combined market shares over this period. These players have emerged as the leading sales winners among UK grocers, while the rest of the market has typically struggled. At a national level the pressure for larger superstores and hypermarkets will continue, although any further proposals for expansion of existing out-of-centre convenience stores must be considered in terms the key PPS6 tests.

vii) The Internet and Non Store Trading

3.24 Home shopping (mail order and internet shopping) is the main component of non-store retailing. In total, non-store retailing currently accounts for approximately 5.8% of comparison goods expenditure. Mail order shopping has a long history and, whilst it has suffered to some extent from the rise of the internet, it has evolved and new retailers have entered the market and expanded. Examples include Next, Marks & Spencer and more recently John Lewis. GUS has also bought Argos and Homebase and Littlewoods has purchased Index. These retailers expect home shopping to play an increasing, but supplementary, role to traditional store based shopping.

3.25 The growth of e-tailing has been dramatic over the last few years, but this has been from a very small base. It is estimated that about 5% of retail expenditure is now conducted on the internet, although most foodstore operators have closed their virtual stores or warehouses and operate home deliveries out of existing stores. Books, games, DVD'S/video's and CD's along with finance, insurance and travel services have been the most affected, but small electrical goods, computer hardware and software, white goods, toys and gifts, and some clothing and footwear could see internet sales take an increasing share of retail spending.

3.26 Research suggests that retail warehouses could suffer proportionately more than town centres from the growth in e-tailing due to the types of goods sold in them. However, we consider that all centres will be affected to a greater or lesser extent, depending on the type of goods they sell and the function they perform. Where town centres adapt, and become more leisure-orientated, and retailers increasingly use their shops as showrooms running web sites in parallel, conventional retailing should continue to prosper. However, price competition and low inflation/deflation looks likely to be a permanent state of affairs.

3.27 In the convenience sector it is considered that internet shopping is unlikely to have a significant effect in the future. Although Verdict predict that growth will be fuelled by the increasing confidence of consumers and ordering is speeded up by broadband and mobile phone technology, overall they forecast that this will not have a significant effect on sales. Verdict predict that on-line grocery sales will increase from £1.4bn in 2001 to £5.3bn by 2007, this will still however only make up 4% of all grocers and food specialist sales.

viii) Convergence of Retail and Leisure

3.28 Since the mid-1990's, despite higher rents, there has been a steady trend, driven by central government policy, towards building new leisure schemes in town/edge of centre locations. A number of factors have helped drive the growth of leisure venue provision in town and city centres. For example, urban living is back in fashion; 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.

3.29 This change in location has also been combined with the inclusion of leisure complexes that incorporate both retail and leisure facilities. Leisure facilities can be used as a way of encouraging customers to stay longer and consequently spend more. The Trocadero in London's West End is an example of this, with mainstream retailers such as HMV, Whittards, Sock Shop and Accessorize taking advantage of the high pedestrian flows created by the major leisure attractions such as Funland, the UGC multiplex and Planet Hollywood. This is also the case in the Metro Centre, Gateshead where a large leisure centre has been incorporated into the retail complex. Mixed-use retail and leisure development has proved to be a real growth area in town centres.

Summary

3.30 National retail trends indicate a continued growth in incomes and expenditure, albeit not at such strong levels as in the last 15-20 years. The growth in expenditure is focused on comparison goods with virtually no increase in convenience goods expenditure.

3.31 Increased car ownership has resulted in greater household mobility and therefore the choices for shopping centres to visit and the distances that can be travelled are much greater. Internet shopping has grown phenomenally in the last few years and looks set to continue in certain sectors, it remains however only a very small percentage of overall spending.

3.32 Retail planning policy has become much more focused on promoting and protecting town centres. Although new forms of retailing, such as purpose built out-of-centre regional shopping centres, factory outlet centres and retail warehouse parks have emerged, where these are out-of-centre, they are now largely restricted by planning policy.

3.33 The foodstore operators have continued to evolve their formats and offer. With restrictions on out-of-centre stores growing, and changing socio-economic trends, several large operators have returned to the high street with small convenience stores. Operators are also seeking to extend their comparison goods offer, turning stores into variety or mini department stores. This trend poses a threat to smaller centres, where the large out-of-centre stores become one stop shopping destinations negating trips to the town centres.

3.34 There has been a continued polarisation towards larger centres and the provision of larger stores in these larger centres. Where smaller centres have been unable to diversify their offer or create niche markets they have suffered. The focus on urban renewal has increased demand for town centre sites for a wider range of land uses.

3.35 Since the mid-90's, despite higher rents, there has been a steady trend, driven by central government policy, towards building new leisure schemes in town/edge of centre locations. Mixed-use retail and leisure development has proved to be a real growth area in town centres. These trends present significant opportunities and challenges to the District's centres.

4. SUB-REGIONAL CONTEXT

4.1 This section describes the role and function of Harlow in the wider regional network of centres. The household survey identifies the following centres as achieving significant market shares across the eleven survey zones - Bishops Stortford; Cheshunt, Welwyn Garden City; Lakeside; Hertford; Chelmsford; Romford; Cambridge; Stevenage and Hoddesdon. Table 4.1 below provides an overview of the status, scale and location of these competing shopping destinations.

Table 4.1: Competing Centres, Sub-Regional Context

Centre	East of England Plan Designation*	Floorspace sq m gross	Miles from Harlow	Drive time from Harlow (mins)
Bishops Stortford	Town Centre	50,000	9	15
Cheshunt	Town Centre	-	13	21
Welwyn Garden City	Major Town Centre	49,000	16	28
Lakeside	-	111,000	25	32
Hertford	Town Centre	-	10	17
Chelmsford	Regional Centre	-	21	34
Romford	Town Centre	147,000	20	29
Cambridge	Regional Centre	120,000	40	44
Harlow	**Major Town Centre**	**-**	**-**	**-**
Stevenage	Major Town Centre	64,000	20	32
Hoddesdon	Town Centre	31,527	7	12

* Based on designations in the Panel Report to the East of England Plan (June 2006)

4.2 For the purpose of our benchmarking assessment we have drawn on number of different data sources (including PROMIS; Javelin Retail Rankings, Focus Property Intelligence database, Retail Promis and Egi). We have also contacted each of the local authorities to clarify the position regarding development in the pipeline. Our assessment of competing centres identifies the scale and quality of their retail offer and the extent to which this is likely to change in the future due to new development and the extent to which this could impact on shopping patterns in the Harlow catchment area and its overall share of retail spend.

4.3 We have examined the shopping venue rankings produced by the Javelin Group as shown in Table 4.2. The town's rank is obtained using a scoring system, which takes account of the presence in each location of multiple retailers, anchor stores, fashion operators and non-fashion multiples. The score attached to each operator is weighted to reflect their overall impact on shopping patterns.

Table 4.2: National Retail Rankings

Centre	Rank 2005	Rank 2006
Romford	51	54
Lakeside	57	70
Cambridge	71	78
Chelmsford	118	104
Stevenage	108	124
HARLOW	**179**	**152**
Welwyn Garden City	202	197
Bishops Stortford	247	248
Hertford	468	499
Hoddesdon	672	679
Cheshunt	1,514	1,528

Source: Javelin VenueScore Retail Rankings

4.4 The table shows that Harlow is ranked 152nd and has improved from 179th in 2005, due primarily to the development of The Water Gardens. It is placed 6th out of the eleven centres considered and there would appear to be significant potential to improve its overall ranking.

4.5 Table 4.3 shows the changes in Prime Zone A retail rental levels across the main competing centres between 1999 and 2006. In terms of 2006 retail levels, Harlow is ranked 7th out of the eleven centres based on rental levels. It is placed above Bishops Stortford and Hertford, but has significantly lower rental levels than Cambridge, Lakeside. Harlow has similar rental levels to Stevenage and Welwyn Garden City which are also designated as Major Town Centres in the East of England Plan hierarchy.

Table 4.3: Comparison of Prime Retail Rents (£ per sq m)

	1999	2000	2001	2002	2003	2004	2005	2006
Lakeside	3,229	3,337	2,691	3,229	3,337	3,552	3,767	3,875
Cambridge	2,422	2,422	2,422	2,583	2,583	2,583	2,583	2,583
Romford	1,884	1,884	1,722	1,830	1,938	2,045	2,153	2,207
Chelmsford	1,507	1,722	1,615	1,615	1,615	1,722	1,776	1,830
Stevenage	915	1,023	1,076	1,130	1,130	1,184	1,184	1,184
Welwyn Garden City	646	753	861	969	969	1,076	1,130	1,130
Harlow	**915**	**1,023**	**969**	**1,023**	**1,076**	**1,076**	**1,076**	**1,076**
Bishops Stortford	700	753	646	700	700	753	861	861
Hertford	431	431	431	484	484	484	538	592
Cheshunt	-	-	-	-	-	-	-	-
Hoddesdon	-	-	-	-	-	-	-	-

Source: Colliers CRE In Town Rents 2006

4.6 Table 4.4 also compares retail yields in Harlow with the competing centres. Its retail yields have improved during the last 5 years, but at the beginning of 2006 its yield of 6.5% is not as strong as the majority of the competing centres.

Table 4.4: Comparison of Prime Retail Yields (%)

	2000	2001	2002	2003	2004	2005	2006
Bishops Stortford	6.5%	6.5%	6.5%	6.5%	6.5%	6.5%	6.5%
Cheshunt	-	-	-	-	-	-	-
Welwyn Garden City	7%	7%	7%	7%	7%	7%	7%
Lakeside	4.75%	5%	5.5%	5.5%	4.75%	4.75%	4.75%
Hertford	8.5%	8.5%	8.5%	8.5%	8.5%	8.5%	8.5%
Chelmsford	6%	5.5%	5.5%	5.5%	5.5%	5.25%	5%
Romford	7%	7%	7%	6%	5.5%	5.5%	5%
Cambridge	5%	5.25%	5.25%	5.5%	5.25%	5.25%	5.25%
Harlow	**7.5%**	**7%**	**7%**	**7%**	**7%**	**6.75%**	**6.5%**
Stevenage	7%	7%	7%	7%	7%	6.5%	6.5%
Hoddesdon	-	-	-	-	-	-	-

Source: Valuation Office Property Market Report: Shopping Centre Yields (January 2006)

4.7 We have drawn on the household survey to identify Harlow's principal competitors, and the challenges posed by new developments planned or underway within these towns. Plan 8 illustrates the influence each competing centre on market shares within the defined study area. We consider the current role and implications of planned new development in each centre in turn. Appendix 1 illustrates the extent of trade leakage to the competing centres from the survey area in more detail.

Bishops Stortford

4.8 Bishops Stortford is a market town located in East Herts District Council to the north east of Harlow. It has an affluent catchment and is an important commuter area. It benefits from good road access to the M11 and A120, as well as Stanstead airport, and has direct train services into London.

4.9 The survey results indicate that the centre draws approximately £107.84 million of comparison goods expenditure from the survey area, which is equivalent to a 7.4% market share. This is the highest market share out of all the competing centres in the survey area, and it has the strongest market share in Zones 10 (40.8%) and 11 (11.6%).

4.10 Promis identifies that Bishops Stortford has a total gross retail floorspace of 50,000 sq m. The prime pitch is relatively compact and includes South Street, Jackson Square and Potter Street The town's retail offer is anchored by two purpose-built shopping centres. It has a mix of national multiple retailers and long-established family firms. According to Focus, 60% of the top 20 national multiple retailers are present in the town including Boots, Marks and Spencer, Argos and Next. The town also has a twice weekly street market.

4.11 Jackson Square Shopping Centre has a total floorspace of 9,323 sq m. The centre opened in 1974 and was refurbished in 1988. It is currently undergoing a major refurbishment and extension which will include a 6,968 sq m Sainsbury's foodstore, 3,716 sq m of retail units, 1,486 sq m of restaurants, a 720 space multi-storey car park and c.190 residential units. Some demolition work has taken place and a large part of the scheme is expected to be open by mid 2007. The other purpose-built centre is Sworders Yard which consists of specialist antiques retailers.

4.12 According to Promis, requirements from retailers looking to locate in Bishops Stortford have been increasing since 2003, albeit with a slight dip in demand at the beginning of 2006. In April 2006 there were 54 requirements. Prime Zone A rents were £1,184 per sq m in 2006, placing it 5th of the eleven centres, above Harlow. Yields have been static at 6.5% since the late 1990s.

4.13 The attractive town centre is designated as a Conservation Area and there are numerous Listed Buildings. It has several historic buildings which attract visitors to the centre as well as other attractions such as the Rhodes Museum and Commonwealth Centre and ruins of a Castle.

4.14 The only commitment in Bishops Stortford town centre is the extension to the Jackson Square Shopping Centre described above. We are not aware of any further proposals to expand the town centre's retail and leisure offer. This is complemented by its strong mix of A3/A4 uses.

Welwyn Garden City

4.15 Welwyn Garden City lies to the west of Harlow and falls within Welwyn and Hatfield District Council. It is situated between Hatfield and Stevenage east of the A1 (M) motorway. It was built in 1920 and is an exemplary New Town. It is designated as a regional centre in the East of England Plan (December 2004).

4.16 Welwyn Garden City draws circa £64.3 million of comparison goods expenditure from the survey area, which equates to around a 4.4% market share. The telephone survey results show that it has its strongest market share in Zone 8 (16%), followed by Zone 7 (8%) and Zone 9 (8.4%).

4.17 The centre has a total gross retail floorspace of 49,000 sq m. The main shopping areas are Howardsgate, Church Road and Bridge Road. The Howard Centre is the main purpose-built shopping centre and comprises a total floorspace of 22,296 sq m. The centre opened in 1990 and is anchored by Marks and Spencer and Boots. The town also has two department stores, a Co-op and a large John Lewis.

4.18 Focus states that 50% of the top 20 retailers are present in the centre including John Lewis, Next, Marks and Spencer and Boots. However, it has a limited provision of pubs, cafes and restaurants, as well as other leisure attractions.

4.19 Welwyn Garden City is accessible by a number of modes of transport, but, there are conflicts between pedestrian and vehicular movements within the centre. The town centre is carefully laid out, but despite the quality of its landscape, some of the town centre's public spaces require improvement and restructuring to generate more activity and to make them more usable.

4.20 According to Promis, the centre had 27 retailer requirements in April 2006. Requirements increased during 2005, but fell at the beginning of 2006. Prime Zone A rents were £1,130 per sq m at the end of 2005, higher than for Harlow and have been increasing steadily since 2000. Commercial yields have been constant at 7% since the early 1990s.

4.21 Planning permission has been granted subject to s106, for the redevelopment of Sainsburys in the town centre to provide 1,116 sq m of additional floorspace. Other than this we are not aware of any other commitments for additional retail floorspace in the centre. The 2005 Welwyn Hatfield Local Plan does allocate a site between John Lewis and the Howard Centre for additional comparison goods retail floorspace and a development brief has been prepared. A further two town centre sites for additional convenience goods retail floorspace are also allocated.

Lakeside

4.22 Lakeside lies in the Borough of Thurrock 25 miles south of Harlow. It opened in 1990 and is a popular car-based shopping mall, comprising 109,000 sqm of retail floorspace, served by circa 13,000 free car parking spaces. It is easily accessible from the M11/M25. Lakeside is not listed as a retail centre in the East of England Plan as the Plan states that it is a regional out-of-town retail centre and does not have the range of functions of a town centre.

4.23 The shopping centre draws approximately £38 million of comparison goods expenditure from the survey area, which equates to a 2.6% market share. The telephone survey results show that Lakeside has its strongest market share in Zone 5 (6.7%) as well as fairly strong market shares across Zones 1-5 (2.5 – 4.2%).

4.24 The centre is anchored by Marks & Spencer, House of Fraser, Debenhams and Bentalls. It also has 15,000 sqm of leisure floorspace, which includes a seven screen cinema. Planning permission has been granted to remodel the Pavilion to provide circa 6,000 sqm floorspace for restaurants, cafés and retail.

4.25 Lakeside performs a considerably stronger retail role than the other competing centres considered in this section. It is a significant retail destination and attracts people from a much wider catchment across the South East. Its success is reflected by its higher Prime Zone A rental levels and strong yields.

Hertford

4.26 Hertford is situated approximately 10 miles to the west of Harlow on the A414. It is defined as a town centre in the Structure Plan and provides a range of comparison and convenience shopping. The town has retained much of its heritage and has a substantial Conservation Area containing many historic buildings. It benefits from two railway stations as well as close proximity to the A1, M25 and M11.

4.27 Hertford draws approximately £62 million of comparison goods expenditure from the survey area, which equates to around a market share of 4.3%. The survey results indicate that it has a very strong market share in Zone 8 (24.4%), followed by Zone 7 (6.9%) and Zone 9 (5.4%).

4.28 Hertford has one shopping centre, Bircherley Green Shopping Centre, which is anchored by Waitrose and Boots the Chemist. Other retailers in the shopping centre include New Look, Claire's accessories and Country Casuals. The town centre has a wide range of service uses including banks, beauty salons, cafes and take-aways. There are a particularly high number of public houses. The town also attracts tourists visiting Hertford Castle.

Chelmsford

4.29 Chelmsford is an historic centre that stands at the confluence of two rivers, The Chelmer and The Can. It is situated close to the A12 dual carriageway, linking to the M25 and is well served by mainline rail services. It is designated as a major centre in the East of England Plan (December 2004).

4.30 Chelmsford draws c.£21 million of comparison goods expenditure from the survey area, which equates to around a 1.4% market share. It has its strongest market share in Zone 11 (17.5%), but also draws much weaker market shares from Zones 1-7 and Zone 10.

4.31 The main shopping area is compact and largely pedestrianised, with the High Street providing the main 'spine route'. The town has two managed shopping centres - The High Chelmer and The Meadows - located to the north west and south east of the High Street respectively. A number of major multiple retailers are located in the shopping centres and supplement retail provision on the High Street. Key retailers include Debenhams, Marks & Spencer, Woolworths, WH Smith and Next.

4.32 The High Chelmer Shopping Centre opened in 1970 and has a retail floorspace of approximately 23,700 sq m gross on one level comprising 82 units. The centre currently has very few vacant units, reflecting the demand from retailers for space. However, despite recent and ongoing refurbishment/extension of units, the centre appears dated and units are poorly configured to cater for the requirements of modern national multiple retailers. The covered market and multi-storey car park (780 spaces) adjoin the shopping centre to the west.

4.33 The Meadows Shopping Centre opened in 1992 and has a retail floorspace of approximately 14,900 sq m gross located on one level and comprises 40 units. There is an eight screen Odeon Cinema and multi-storey car park on the opposite side of the River Can, with a direct footbridge linking to the shopping centre. The centre is more modern in appearance compared to the High Chelmer shopping centre, but is smaller in size with constrained site boundaries.

4.34 In October 2000, Chelmsford had 84 retailer requirements and was placed 44th in the national rankings. By April 2005, retailer requirements increased to 112, and it was ranked 40th, illustrating that investor confidence is increasing. Operators with an interest in Chelmsford include House of Fraser, Zara and TJ Hughes. Prime Zone A retail rents are estimated to be £1,830 per sq m, placing it 4th out of the eleven centres. Retail yields were also strong at the beginning of 2006.

4.35 In terms of new proposals and commitments, consent has been granted to redevelop a 0.85 hectare site, including the bus station and depot site, to the north of the town centre. The scheme involves the redevelopment of the site to provide a new bus interchange with commercial and residential development to the rear. It will comprise 1,607 sq m of A1/A3 floorspace, 170 residential apartments and a new public square.

4.36 In April 2003, outline planning consent was granted for the redevelopment of Anglia Polytechnic University, to the north west of Chelmsford town centre on a 4.05 hectare site. The outline planning application sought approval in principle for the amount, type and form of development relating to a proposed new urban quarter, reconnecting separate parts of the town centre, establishing continuous parkland across Parkway, and mixed use, high density development.

4.37 Planning permission has also been granted (subject to a S106 agreement) for Phase 1 of the development of land east of the High Street. This is includes circa 1,060 sq m (gross) of A1/A2/A3 floorspace in a range of units comprising generally small scale retail and riverside cafes/restaurants. We understand that a number of other potential town centre development opportunities are in discussion and will substantially enhance the shopping offer in the town centre.

Romford

4.38 Romford is located within the London Borough of Havering and is 20 miles to the south of Harlow. The centre is designated as one of London's ten Metropolitan Centres in the London Plan.

4.39 Romford draws circa £13 million of comparison goods expenditure from the survey area, which equates to a 0.9% market share, the weakest of all the competing centres. The telephone survey results show that it has its strongest market share in Zone 4 (7.8%) and Zone 5 (6.6%). It does not draw any market shares from Zones 7-10.

4.40 The centre has circa 147,000 sqm. gross of ground floor retail and service floorspace. Most of the towns fashion/clothing offer is concentrated within the Liberty Shopping Centre, which comprises retailers such as Hennes, Next, Morgan and Top Shop. The Liberty Centre originally opened in the 1960s and underwent a major refurbishment during 2001/2002, including the provision of a new 800 space multi storey car park.

4.41 There are two department stores in Romford - Debenhams and TJ Hughes. Adjacent to the town centre is the Brewery Shopping Park which opened in 2001 with tenants including TK Maxx, Gap, JJB Sports and Sainsbury's. The Brewery also has a number of leisure outlets including a bowling alley, fitness centre and cinema.

4.42 Romford would appear to be trading well. In recent years rents have increased and yields have strengthened, indicating growing investor confidence in the town. On the back of the Council's aspirations to enhance the centre's role as a strategic centre, Romford has seen a good deal of development in recent years with the completion of The Brewery and the refurbishment of The Liberty. Two further substantial sites are also being developed in the town centre.

4.43 The London Borough of Havering's UDP also aims to enhance the provision of arts, cultural, entertainment, indoor sports and other leisure facilities in Romford in order to consolidate the centre's role as the principal centre within the Borough and as a strategic centre within Greater London.

Cambridge

4.44 Cambridge is a historic university town located to the north of Harlow. It is a higher order retail shopping destination, with a good mix of quality independent and national multiple retailers. It is accessible by train with frequent train services from London, and has excellent road connections to the M11 and A14. There is a limited supply of car parking within the city centre but there is a park-and-ride scheme.

4.45 Cambridge draws approximately £21.5 million of comparison goods expenditure from the survey area, which equates to around a 1.5% market share. The telephone survey results show that it has its strongest market share in Zone 10 (9.1%). Its draw is much weaker from Zones 1-3, 8 and 11.

4.46 The city has a total of 120,000 sq m ground floor floorspace, based on Experian Goad figures. The prime retail area is quite dispersed, but is centred on Petty Cury, Lions Yard, Market Hill and Market Street. However it has a relatively limited department store offer, comprising Debenhams and John Lewis.

4.47 The centre has two managed shopping centre, which account for 29% of the total retail floorspace, The Grafton Centre is the largest and is situated to the north-east of the retail core. It comprises over 70 shops, as well as cafés, restaurants and an eight screen cinema. It is anchored by Bhs and Debenhams and other major multiples include Boots, Burton, H&M and Next.

4.48 Lions Yard is a smaller centre situated within the historic core with approximately 40 shops. The units are fairly small within Lions Yard and there is no main anchor. Retailers within the scheme include Dixons, Game, HMV and Sports World.

4.49 Convenience provision within the city centre is also limited to a Sainsbury’s supermarket and a Marks and Spencer Simply Food store within the Grafton Centre. Quayside, at the north end of Bridge Street, is a focus for bars and restaurants. Vacancy rates in the centre are low. Its retail offer is enhanced by the provision of a daily market and a weekly farmers and craft market.

4.50 In April 2006, Promis reported that there were 163 requirements from retailers looking to locate in Cambridge city centre. Retailers that have recently expressed an interest in the centre include Reiss, LK Bennett, Phase Eight as well as House of Fraser and TJ Hughes. Prime zone A retail rents are estimated to be £2,583 per sq m, placing it second out of the eleven benchmark centres, ahead of Harlow. Its retail yields were estimated to be 5.25% at the beginning of 2006, significantly stronger than for Harlow.

4.51 Opportunities to expand the retail provision within the historic core of Cambridge city centre are limited due to planning policies aimed at preserving the area. However, planning permission has been granted for a major redevelopment of the area around the John Lewis store to create a two level shopping centre with 26,000 sq .m of floorspace and 50 units, to be known as the Grand Arcade. The scheme is expected to open in 2008.

Stevenage

4.52 Stevenage is located to the north east of Harlow and was Britain's first new town. It is designated as a regional centre for retailing within the East of England Plan (December 2004). It benefits from excellent road links to London and is situated just off the A1(M). There is a bus station located in the heart of the town centre and the train station is linked to the town centre by a pedestrian walkway. There are good rail services to King's Cross in London and to the north. The town centre is served by 5,200 car parking spaces.

4.53 Stevenage draws approximately £25.4 million of comparison goods expenditure from the survey area, which equates to around a 1.8% market share. The telephone survey results show that Stevenage has its strongest market share in Zone 8 (10.4%).

4.54 It was Britain's first pedestrianised town centre and has a total gross retail floorspace of 64,000 sq m. The retail core is compact and is arranged in a grid pattern of pedestrianised streets. The principal retail areas include the Forum Centre, Queensway Centre and the Westgate Centre, which are all purpose built shopping centres. Together they account for approximately half of the town's retail floorspace.

4.55 The Westgate Centre opened in 1988 and is a covered centre with approximately 10,219 sq m of floorspace, comprising 35 shops, 2 restaurants and adjacent car parking. The Forum opened in 1997 and represented a major expansion to the north of Stevenage town centre. It comprises c.8,268 sq m in 10 units. Key retailers include Marks and Spencer, Woolworths, Next and Bhs. Foodstores include Iceland, Lidl and Tesco. The town centre also has various markets, including the recently renovated covered market with a wide range of stalls and refreshment facilities.

4.56 In April 2006, there were 37 requirements from retailers looking to locate in Stevenage town centre. These included Debenhams, Robert Dyas, TJ Hughes, Tchibo and Carphone Warehouse. There are also a significant number of requirements from food and drink operators including Costa Coffee, Nandos, La Tasca, Pizza Express and Pret A Manager. Prime Zone A rents are estimated to be £1,184 per sq m, which is higher than for Harlow. Commercial yields were estimated to be 6.5% in 2006 and have fallen slightly since 2004.

4.57 Recent developments in the town include the Plaza scheme, which comprises 5,110 sq m of leisure floorspace designed around a town square and a new 10,000 sq m Asda store on an old college site. These developments have enhanced the southern part of the town centre. Stevenage Borough Council is also working jointly with English Partnerships to regenerate the rest of the town centre, which suffers from a dated environment and a lack of higher quality retailers. ING Real Estate and Stanhope Plc have been selected to bring forward a comprehensive mixed-use town centre regeneration scheme to expand the town's shopping facilities.

4.58 Stevenage also has a modern leisure park incorporating a 12-screen multiplex cinema, nightclubs, bars and restaurants which is located to the west of the railway station but is poorly integrated with the town centre and has a large area of surface car parking.

Cheshunt

4.59 Cheshunt is designated a district centre in the Borough of Broxbourne Local Plan and lies to the south west of Harlow, just north of Waltham Cross. The retail provision in the centre is clustered around the roundabout at the junction of College Road and Turners Hill. The centre has a total of 140 car parking spaces.

4.60 Cheshunt draws approximately £42.9 million of comparison goods expenditure from the survey area, which equates to around a 3% market share. The telephone survey results indicate that Cheshunt has its strongest market share in Zones 6 (8%) and 7 (10%).

4.61 The Experian Goad town centre report identifies a total of 12,741 sq m gross of ground floor floorspace, comprising some 76 retail and service business outlets. There is a significantly higher than average number of units occupied by service uses. In particular estate agents, account for 9.21% of all units, compared to a national average of 3.64%. There is also an above average number of banks. There is an under representation of convenience and comparison units, in particular fashion and variety stores. Cheshunt also has a low level of vacant units.

4.62 In April 2004, multiple retailers occupied 22 of the 76 units in Cheshunt (29%), which is lower than the national average of 34%. Experian Goad highlight 27 key attractors as a benchmark to judge centres against, Cheshunt has just two of these retailers (Tesco and Clarks). This indicates that Cheshunt is not a major comparison goods shopping destination and mainly functions as local shopping and service centre.

4.63 In September 2005 the Focus property Intelligence Database identified 15 requirements from retailers looking to located in Cheshunt, including three comparison, two convenience and 10 service operators. Due to the size of the centre there is no published information regarding Prime Zone A rents or yields.

4.64 The environmental quality of Cheshunt is considered to be reasonable but varies throughout the town centre. There is a mix of traditional Victorian properties and purpose built shopping parades. Parts of the Centre have been subject to environmental improvements, in terms of paving, landscaping and street furniture and this has improved the shopping environment.

4.65 There are currently no proposals or commitments for major new retail floorspace in Cheshunt at present, and based on our analysis, the opportunities for retail development are limited.

4.66 Brookfield Shopping Centre is an out-of-town shopping centre situated near to Cheshunt and just off the A10. The largest 2 stores are Marks and Spencer and Tesco Extra , with many smaller stores including New Look, River Island, Next and Boots in the adjacent Brookfield Retail Park. Although the centre did not feature heavily in the household survey results for comparison goods, plans to expand the centre may mean its impacts upon Harlow increasingly in the future.

Hoddesdon

4.67 Hoddesdon is situated seven miles to the west of Harlow. It is designated as a town centre in the Borough of Broxbourne Local Plan and lies to the north of the Borough. It is a linear centre that runs from the Tower Centre at the northern end of town and south along the length of High Street.

4.68 Hoddesdon draws approximately £30.4 million of comparison goods expenditure from the survey area, which equates to around a 2.1% market share. The telephone survey results show that it has its strongest market share in Zone 9 (15.4%), followed by Zone 6 (4.5%) and Zone 3 (1.7%).

4.69 It is the smallest centre in terms of its total floorspace, with just over 30,000 sqm of ground floor floorspace. The centre has a below average representation of comparison retailers, especially clothing and footwear retailers. There is also a weak representation of key multiple retailers.

4.70 The Tower Centre opened in 1964 and comprises a retail floorspace of approximately 19,000 sqm. The centre is anchored by Argos, Netto and Woolworths. The Centre was last refurbished in 1982, but is badly in need of further investment. The main convenience provision in the town centre is a modern Sainsbury's store on Brewery Road and a Tesco Express on the High Street. Aldi has recently opened a discount foodstore off the High Street.

4.71 Hoddesdon is an attractive centre characterised by an attractive pedestrianised public realm, including the bandstand. The pedestrianised area is very shopper friendly and there is a good provision of street furniture. Much of the town centre is a designated Conservation Area. As far as we understand there are currently no proposals or commitments for major new retail floorspace in Hoddesdon and there are limited development opportunities at present.

Hoddesdon does not offer the range of comparison goods that can be found in Harlow and is not a significant threat to the vitality and viability of Harlow town centre.

Summary

4.72 Our assessment has shown that many of the competing centres surrounding Harlow are set to expand and improve their retail offer further over the next decade. For example, Cambridge's significant increase in its retail offer is likely to mean than it will draw a higher proportion of spend from the survey area. The cumulative impact of these schemes is likely lead to an increased leakage of spend out of Harlow District unless it is able to enhance its retail offer to counteract this.

4.73 Our review of national retail trends identifies the significant polarisation of retail activity which has taken place over the last twenty years. A relatively small number of large dominant regional and sub-regional centres are taking a growing proportion of total spend.

4.74 In this context, Harlow will need to continue to improve and diversify its retail offer to ensure it holds, and strengthens, its position as a regional shopping centre as identified by the East of England plan.

5. HARLOW TOWN CENTRE: HEALTHCHECK

5.1 Having examined the sub-regional context and identified Harlow's position and performance relative to its principal competitors, in this section we set out the results of our detailed assessment of the vitality and viability of Harlow town centre, based on the PPS6 indicators.

Context

5.2 Harlow was designated as a New Town in March 1947 as one of a ring of eight new planned communities around London. These New Towns were planned to house the people displaced by the extensive bombing of London during the War. The vision for the New Towns was to provide freestanding communities that offered work as well as homes to those who moved there. Development Corporations were formed to bring the New Towns into being.

5.3 Sir Frederick Gibberd published the Masterplan for Harlow. The masterplan created a series of self-sufficient neighbourhoods, each with its own shopping and community facilities within walking distance. Neighbourhoods were separated by green wedges bringing the countryside within easy access of every resident. There were a number of underlying principles in the masterplan which still hold true today, including:

- Strong local centres
- Distinct residential neighbourhoods
- Walkable districts
- Green wedges between neighbourhoods
- Balancing density with open space
- Access to employment in the town
- A mix of uses and range of experiences within Harlow
- High quality design

5.4 The master planned nature of the town, and the fact that it was delivered as a series of major phases and complete estates within them, has left a fabric that offers little in the way of remnant land found in more organically evolving settings.

Scale and Diversity of Uses

5.5 According to Experian Goad's (2006) figures Harlow town centre has a total of 81,380 sq m gross of ground floor retail and service floorspace, comprising 269 units. Tables 5.1 and 5.2 highlight the composition of Harlow by the number of units and floorspace, as defined by Experian Goad.

5.6 The centre has an average representation of units occupied by retailers in the comparison category. In particular, the centre has a high proportion of menswear, footwear and variety store retailers and an under representation of furniture, books/stationers and car accessory retailers. Harlow has an average representation of ladieswear and other clothing retailers, which suggests that there is potential to improve the quantum and quality of ladies fashion retailers.

5.7 The number of units occupied by convenience and service units is below the national average. In particular, there are no off licences, greengrocers or fishmongers within the town centre. There are also a low proportion of butchers. There is an under-provision of service units, including a particularly low proportion of laundrettes/dry cleaners, building societies and estate agents.

Table 5.1: Harlow Composition by Number of Units

Retail Category	Outlets Number	%	% GB	Variant %
Convenience	19	7%	9%	-2%
Comparison	131	48%	47%	1%
Service	65	24%	32%	-8%
Vacant	46	17%	10%	7%

Source: Experian Goad Town Centre Report (2006)

Table 5.2: Harlow Composition by Retail Floorspace

Retail Category	Floorspace Sq m Gross	% of Total Gross Floorspace	% GB	Variant %
Convenience	10,405	13%	17%	-4%
Comparison	48,870	60%	53%	7%
Service	10,310	13%	21%	-8%
Vacant	10,960	13%	8%	7%
TOTAL	**80,545**	**100%**	**100%**	**-**

Source: Experian Goad Town Centre Report (2006)

5.8 In addition to retail floorspace, Harlow has a limited range of leisure attractions. There is no evident leisure quarter and such uses are dispersed throughout the town centre. The only significant national pub chains are Wetherspoons and Yates Wine Lodge, located in the north of the town centre along with Liquid nightclub and various takeaways uses. There are some food and drink uses located on the edge of the town centre on Terminus Street and there is a cluster of branded restaurants and cafés in the Water Gardens development. There is a limited food and drink offer within the Harvey Centre.

5.9 Other leisure uses include:

- The Playhouse Theatre on the edge of the town centre, to the rear of the Harvey Centre;
- Esporta Heath and Fitness Club, located to the rear of the Council Offices in the Water Gardens development;
- Rileys Snooker Club, located to the rear of the Harvey Centre, in-between Broadwalk and the Water Gardens; and
- Mecca Bingo, located on the edge of the town centre along Terminus Road.

Retailer Representation

5.10 A multiple retailer is defined as being part of a network of nine or more outlets and their presence in a centre is often an indicator of its relative strength and attraction as a shopping location. In Harlow, multiple retailers occupy 128 of the 269 units (48%), which is higher than the national average of 34%. This figure suggests that the town centre has a good representation of national multiple retailers, although the quality of its retail offer is analysed further below.

5.11 Experian Goad highlights 26 key attractors as a benchmark to judge centres against. Harlow has 17 of these retailers, including Marks & Spencer, Next, Top Shop and Tesco. Although this highlights the good representation of key multiple retailers you would expect to see in a shopping centre of regional importance, it also highlights the weak department store offer in the centre and the lack of higher-order quality fashion retailers. Quality anchor retailers absent from the town centre include, for example, John Lewis, House of Fraser, H&M and Debenhams.

5.12 Plan 9 identifies three main shopping areas within Harlow town centre, namely Town Centre South, Town Centre Central and Town Centre North. For the purposes of the health check we have divided the centre into these three ‘shopping quarters’, which enables a more detailed understanding of the composition of the centre. Their main uses and characteristics are defined and described below:

(i) Town Centre South

5.13 Town Centre South predominantly comprises the new Water Gardens development, which represents a significant extension to Harlow town centre. It opened in 2004 providing 12,077 sq m 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 TK Maxx and Matalan, a 1,200 space multi-level car park, new Council offices, an Esporta health club and four restaurant and café units.

5.14 Retailers occupying units within the scheme include Woolworths, Sports World, Peacocks, Next, HMV, River Island and TopShop. The original water gardens have also been restored to provide an area of open space and an enhanced public realm.

5.15 The Water Gardens scheme appears to be trading well and offers a variety of town centre uses. However, the Asda store is reportedly not trading as well as anticipated, possibly because of the fact that it shares parking with the rest of the scheme. It appears that the scheme has shifted the emphasis and retail gravity of the town centre, as highlighted in our analysis of pedestrian flows. Policy RTCS 12 of the Local Plan states that this area is subject to primary frontage policy now trading has commenced.

(ii) Town Centre Central

5.16 Town Centre Central represents a substantial and strategic part of the town centre. It contains the two core shopping areas - the Harvey Centre and Broadwalk - which are designated as primary shopping frontages. It also comprises Little Walk (primary shopping frontage), Terminus Street (secondary frontage), Westgate (secondary frontage), part of Westgate Square (secondary frontage) and Playhouse Square (no designated frontage). The majority of this area is pedestrianised with the exception of (i) Terminus Street, which acts as a public transport interchange in the town centre; and (ii) Westgate and Playhouse Square which are on the edge of the centre and provide service access.

5.17 The local plan identifies that Town Centre Central is key for improving the quality and variety of the town centre's comparison retail offer, to improve the quality and ambience of the town centre environment and to improve transport and accessibility. The plan notes that many of the existing facilities should be retained within the town centre as part of any redevelopment, specifically the Playhouse, library, church, anchor retailers and key service providers as well as First Bowl and the Bingo Hall.

5.18 Approximately 52% of the total retail floorspace in Harlow is located within the town's two managed shopping centres, namely The Water Gardens and the Harvey Centre. The Harvey

Centre is the oldest managed shopping centre in Harlow town centre. It opened in 1982 and contains approximately 33,444 sq m of retail floorspace over two levels. It served by a multi-storey car park with approximately 770 spaces. The centre is anchored by Wilkinson, Tesco Metro, BhS and Marks and Spencer. Other retailers include Barratts, Thomas Cook, Evans, Card Factory, Superdrug, Argos and JJB Sports. The food and drink offer in the centre is limited, but includes Burger King, BhS and Morrellis Café.

5.19 The Harvey Centre is a key area of retail activity within the town centre due to its central location and its links with the surrounding shopping streets. The Centre has entrances on to Playhouse Square, Broadwalk and West Gate. Many of the units on the eastern side of the centre have double frontages with entrances onto Broadwalk. The centre has a mixture of different sized units but has a good proportion of larger units required by modern multiple retailers. The centre has some vacant units but is generally performing well.

5.20 The Harvey Centre was last refurbished in 1995 and is beginning to look dated. It is inward facing and the external façades are unattractive with servicing areas surrounding the centre. Planning permission has been granted to extend the Harvey Centre incorporating a new Debenhams department store and 22 additional retail units. However, a legal agreement has not yet been signed. The centre was sold to new owners (Mulitplex Property UK Ltd, Westfield Investments Ltd and Reuben Brothers Foundation) at the end of 2004 and there is now potential for the scheme to move forwards although at the time of finalising our study we were not aware of any progress and have therefore not treated this scheme as a commitment in our quantitative need assessment.

5.21 Broadwalk is a linear street running along the 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 fails to attract many of the higher order key national multiple retailers as the majority of the units are small and poorly configured. Retailers that are present include Bon Marche, The Body Shop, Monsoon, Ethel Austin and Holland and Barrett.

(iii) Town Centre North

5.22 Town Centre North includes the secondary shopping frontages of North Gate, part of West Square, Post Office Road and Stone Cross, Kitson Way and Post Office Road which do not have any frontage designations.

5.23 The Local Plan notes that this area will play a key role in diversifying the offer of the town centre providing entertainment, leisure, food, drink and residential uses to strengthen the evening economy. It has been identified for the development of a hotel and conference centre to catalyst for other operators. The plan notes that there is scope to relocate uses from Town Centre North to other areas of the town centre. It also notes that Town Centre North would provide an appropriate location to relocate the Playhouse. Various sites are identified for redevelopment within the local plan.

5.24 Town Centre North comprises a mix of uses. The majority of the area is pedestrianised with the exception of Kitson Way and Post Office Road. Town Centre North extends to the west of the town centre where there is a 629 space multi-storey car park, offices, a vacant cinema and various service uses. This area connects with Westgate and West Square which comprises a Wetherspoons public house, various service uses such as solicitors offices and estate agents. There is also a high proportion of vacant uses.

5.25 The area also incorporates Stone Cross which is a large open space where a market has been operating for the last 50 years. On Tuesdays, Thursdays, Fridays and Saturdays there is a general market with a variety of stores ranging from fruit and vegetables to hardware, fashion and jewellery. On Mondays there is a bric-a-brac market and there is also a farmers market once a month. One and two storey buildings surround Stone Cross Square and the retail units are occupied by a range of lower order operators including a large post office and sorting office, Yates Wine Lodge and Natwest Bank. Along the Rows just off Stone Cross Square there are two nightclubs and a cluster of takeaway uses.

5.26 This area has the highest proportion of vacancies in the town centre. Many of the retail fascias are not well maintained and this results in a cluttered and run down appearance. The environment is poorly maintained. Many of the vacancies are around Westgate where the Harvey Centre was to be expanded. At the time of writing the Council was seeking to appoint a developer as part of a joint venture to bring forward the comprehensive redevelopment of this area.

5.27 To the north of Town Centre North lies an area called Wych Elm which contains a mix of mainly employment uses including a fire station, bus depot, ambulance station, Dairy Crest depot and a multi-storey car park. In the local plan Wych Elm is defined as an edge of centre location and is a key location which could offer the potential to extend the town centre by locating uses such as offices, civic functions and residential uses in this area. Wych Elm has a specific housing allocation of 110 dwellings.

Retailer Demand

5.28 Table 5.4 summarises the change in the number of retailer requirements for Harlow together with the relative change in its rank order. Following a high in April 2003, the number of requirements in Harlow has declined to 38 in October 2006. This is likely to be because of retailers meeting their requirements in the Water Gardens development.

Table 5.4: Retailer Requirements

No. of Requirements	Ranking (1st Highest)	Date
38	214	Oct 06
50	153	Apr 06
50	154	Apr 05
54	125	Apr 04
57	107	Apr 03
48	138	Apr 02
48	121	Apr 01

Source: Focus Property Intelligence, January 2007

5.29 Table 5.5 provides a more detailed picture of retailer requirements for Harlow. At January 2007 the Focus Property Intelligence Database identified 38 requirements, including 17 comparison, 4 convenience, 11 leisure and 4 service operators. In total these operators require between 28,599 and 40,830 sq m gross of retail floorspace. The full breakdown is attached at Appendix 2.

Table 5.5: Harlow Town Centre Requirements

Retail Category	No. of Units	Min. Floorspace (sq m gross)	Max. Floorspace (sq m gross)
Comparison	17	14,622	20,308
Convenience	4	2,007	2,443
Service	4	9,662	13,378
Leisure	11	2,309	4,701
TOTAL	**38**	**28,599**	**40,830**

Source: Focus Property Intelligence, May 2006

5.30 The requirements include a range of mid-market comparison goods retailers including the department store operator TJ Hughes. It is clear that these retailers would not substantially enhance the higher order quality of Harlow's retail offer. It should be noted that a high proportion (9,290 sqm) of the comparison requirement is also from B&Q.

5.31 There are four requirements from convenience operators, although this should be treated with caution, as some food operators do not register requirements on publicly accessible databases due to the strong market competition for development sites. There are also a range of service requirements from café/restaurant operators, such as Wagamama and Pizza Express. Such operators would help improve the quality of the food and drink offer in the town centre.

Shopping Rents

5.32 The level of rent which retailers are prepared to pay for retail space within a centre is an indication of the perceived strength of that centre (although other factors such as the availability of floorspace have an impact on rental value). Table 4.3 in Section 3 sets out the Prime Zone A retail rents in Harlow town centre and neighbouring centres.

5.33 Harlow town centre is achieving lower rents than competing centres in the sub-region, with the exception of Bishops Stortford and Brentwood. In relation to the network of retail centres in the East of England Plan, Harlow has the lowest rental values of the other regional centres (namely Stevenage and Welwyn Garden City). Rents in Harlow fell in 2001 but rose to previous levels in 2003 and have been constant ever since at £1,076 per sqm.

Commercial Yields

5.34 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.

5.35 Table 4.4 in Section 4 compares prime retail yields in Harlow town centre with other centres in the surrounding area. It shows that Harlow's yields have strengthened in the last two years and now stand at 6.5%. Despite this strengthening, Harlow's yields are still higher than for Brentwood, Cambridge, Chelmsford and Brent Cross.

Vacancy Levels

5.36 The proportion of vacancies is one of the relevant indicators used to assess the vitality and viability of centres. It should be used with caution, however, as vacancies can arise even in the strongest town centres, particularly where properties are under alteration or are subject to redevelopment. Conversely, the absence of vacancies could be a symptom of under-provision of space, restricting the supply of suitable modern units for new retailers and current retailers in the centre from securing new (or enhanced) representation.

5.37 Table 5.8 indicates that there are 46 vacant units in Harlow town centre, equating to a vacancy rate of 17%, well above the national average of 10%. The majority of the vacant units are located in Town Centre North. In particular, there is a high concentration of vacant units in the Westgate area of the town centre where the Harvey Centre was due to expand and leases came to an end or were renewed on an unattractive short term basis.

Table 5.8: Harlow Town Centre Vacancy Rates

Vacant Units	% of Total Units	National Average (%)	Vacant Floorspace (sq m)	% of Total Floorspace	National Average (%)
46	17%	10%	10,962	13%	8%

Source: Experian Goad Town Centre Report (January 2006)

5.38 There are clusters of vacant units in Stone Cross Square, Little Walk and East Walk. There are also several small vacant units in the Harvey Centre and two vacant units in the Water Gardens which we understand are under offer.

Pedestrian Flows

5.39 Pedestrian flowcounts provide a direct measure of the number and movement of people in different parts of a centre at various times of the day. As such they provide an indication of:

- a centre's overall attractiveness;
- the commercial importance of individual streets and the location of the prime pitch;
- the significance of key retailers and shop clusters within streets; and
- pedestrian links across the centre.

5.40 When compared over a period of years, pedestrian surveys provide a good indicator of pedestrian growth or decline within a centre. They also allow more detailed analysis of the changes in flows in particular streets and consideration of what action can be taken to increase flows.

5.41 We have compared historical pedestrian survey counts for Harlow's central area undertaken in June 2004 and June 2005. In particular, these surveys help provide an indication of the impact of the opening of the Water Gardens developments on pedestrian footfall in Harlow town centre. It is important to note that care needs to be taken when interpreting the survey results as significant variations can arise in footfall due to factors such as weather conditions, school holidays, one-off events in the survey or neighbouring towns and changes to the count locations and count distances.

5.42 Overall, there was an increase in average weekly pedestrian flows in Harlow town centre between June 2004 and June 2005 by approximately 7,200 people. We consider that this growth can be largely attributed to the opening of the Water Gardens development, which increased the range of shops in Harlow town centre and brought more shoppers into the town.

5.43 In 2004, the highest pedestrian counts were recorded inside the Harvey Centre. In 2005, the highest counts were recorded outside Dorothy Perkins on Broad Walk. This suggests that the Water Gardens development has created stronger pedestrian flows along Broad Walk, which provides the key link between the Harvey Centre and the Water Gardens. This helps to ensure that it is a lively and busy public space and a main movement axis through the town centre.

5.44 Pedestrian flows at the entrance to the Harvey Centre from Broad Walk remained stable between 2004 and 2005. Within the Harvey Centre pedestrian flows also remained fairly static, reflecting the centre's position as an established shopping centre within Harlow town centre.

5.45 The 2005 survey area included the Water Gardens development, which opened in September 2004. In 2005, some of the highest flows were recorded in this area of the town centre. For example, the second highest count in the town centre was outside Topshop. Although pedestrian flows were high in the main part of the Water Gardens, flows by Nandos and the Council Offices were significantly lower.

5.46 Low flows tend to be recorded in peripheral areas, characterised by vacant outlets that are losing their popularity with shoppers and are not attractive to retailers. The areas with the lowest flows in 2004 were the Rows and West Square. In 2005, the number of pedestrians at West Gate, Post Office Walk and East Gate had also declined. These areas are characterised by vacant units, low quality buildings and under used public spaces. West Square also has poor connections into surrounding movement routes. There are plans to regeneration this area of the town centre and it is important that the impact on future pedestrian flows is considered in order to create strong links between Town Centre North and the rest of the town centre.

Accessibility

5.47 Harlow benefits from good road and public transport accessibility. It is situated on Junction 7 of the M11 which runs north to Cambridge and south to London linking up with the M25 at Junction 27. To the west of the town is the A10 and the A414, which runs through Harlow, providing an east-west route from Chemlsford to St Albans.

5.48 There are frequent train services to Harlow town train station from London Liverpool Street and Cambridge. The Stansted Express service also runs through Harlow. However Harlow Town train station is situated outside of the town centre, approximately fifteen minutes walk away from the town centre. Although it is possible to walk from the station, pedestrians have to cross the ring road which acts as a significant barrier to movement.

5.49 Good bus services operate in and around Harlow. Buses run from Mondays to Saturday to surrounding centres including Stevenage, Heathrow Airport, Stanstead 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. Buses stop along Terminus Street in the town centre.

5.50 The town centre has over circa 3,800 car parking spaces that all operate a pay and display system. The car parks are located on the edge of the town centre and the town centre is predominantly pedestrianised. The car parks are shown in Table 5.9 below.

Table 5.9: Harlow Town Centre Car Parks

Location	Number of Spaces
Post Office Road	147
The Harvey Centre	732
Wych Elm (outside of the town centre)	112
Linkway, Kitson Way	628
NCP Terminus Street	931
Water Gardens	1250
Total	**3,800**

Source: Experian Goad/Harlow Centre website

5.51 The town centre also operates a shopmobility scheme run by Harlow District Council. Electric scooters and manual wheelchairs are provided for the less able to access the town centre at a cost of £2 for visitors and an annual membership charge of £5 for residents.

Crime and Safety: Perceptions and Issues

5.52 Harlow runs a project called “StopWatch” which links a number of shops throughout the town to each other and to Essex Police via a radio system. The town centre is also comprehensively covered by CCTV which links to a central control room. Although these measures have been praised for creating a safe and crime-free, some parts of the town centre feel unsafe and insecure. This is particularly true in the northern part of the town centre where there are several large and underused areas of public space, unattractive service areas, clusters of vacant units and blank facades.

Environmental Quality

5.53 The quality of Harlow's shopping environment and public realm varies throughout the town centre. The Water Gardens provides a contemporary town centre environment with modern and high quality street furniture, paving materials and planting. The cafes and restaurants have outdoor seating areas, albeit with views over a large expanse of surface car parking. Part of the restored water gardens are set down from the main shopping area and although provide an area of attractive landscaping, it is not clearly visible to visitors.

5.54 The rest of the town centre is inward facing, which results in blank facades offering poor gateways into the town centre, perimeter car parks and unattractive service areas. The majority of the town centre is predominantly pedestrianised, although the public realm is poor and in need of investment. Town Centre North is more tired looking and run down than the rest of Harlow town centre, and investment is required as a priority. The majority of the buildings in the town centre are one or two storeys. The upper floors are mainly used for residential, office and storage uses, or are vacant.

Proposals/Commitments

5.55 There is currently planning permission to extend the Harvey Centre to provide a new department store and 22 additional retail units, although the legal agreement relating to this permission has not been signed. The centre was purchased by a consortium of new owners at the end of 2004 which has created potential for the scheme to move forward. However, at the time of finalising our study it was not clear whether the scheme would proceed as planned. We have not therefore, treated it as a commitment in our quantitative need assessment.

Summary

5.56 Our detailed qualitative analysis of Harlow town centre indicates that the town centre is relatively healthy and performing well in relation to a number of health check indicators. However, there are some weaknesses which need to be addressed in order for the centre to fulfil its sub-regional role and compete with surrounding centres.

5.57 Harlow has good transport links and the majority of the town centre is pedestrianised. The centre has an average proportion of comparison goods retailers, and its offer has been enhanced by the opening of the Water Gardens, which has provided larger and better configured units, more attractive to modern retailers.

5.58 The town centre is divided into three distinct areas; the Water Gardens, Town Centre Central and Town Centre North, which have different characters and provide a variety of uses. Linkages and permeability between the different areas is poor and could be improved to encourage pedestrian flows over a wider area. The Water Gardens has shifted the emphasis of the town centre to the south, which has exacerbated the decline of the northern part of the town centre. The Council have aspirations to regenerate Town Centre North to diversify the town centre's offer by providing entertainment, leisure, food, drink and residential uses to strengthen the evening economy. In light of these proposals, it is important that the Council's primary and secondary shopping frontages are revised.

5.59 Multiple retailers occupy 48% of units compared to a national average of 34%, although there is a weak department store offer and the centre lacks higher-order quality fashion retailers. The main managed shopping centre is the Harvey Centre that is anchored by Marks and Spencer, Bhs and Tesco Metro. The Harvey Centre benefits from a central location and performs well despite its dated appearance. Planning permission was granted to extend the centre but this has never been implemented. The town centre also has a market, which operates five days a week.

5.60 The healthcheck identified a number of weaknesses in the town centre. The number of units occupied by convenience and service units is below the national average. Food and drink and leisure uses are limited. It is considered that leisure uses could be enhanced with additional leisure attractions and quality food and drink operators. A specific quarter could be developed to help sustain an evening economy.

5.61 The town centre has a high vacancy rate, which highlights potential signs of vulnerability. A significant proportion of the vacant units are around Westgate where the planned Harvey Centre extension would occur.

5.62 Requirements from operators looking to locate in the centre are declining. Those retailers looking to locate in the centre are predominantly mid market comparison retailers and food and drink operators. In order to enable existing retailers to trade up, and to attract major new retailers to the centre, it is necessary to identify new opportunities for creating additional retail space, in addition to the ongoing redevelopment and modernisation of current stock, particularly in Town Centre Central and Town Centre North.

5.63 Environmental quality varies throughout Harlow town centre. The Water Gardens provides a contemporary town centre environment with high quality street furniture, paving, materials and planting. The cafes and restaurants have outdoor seating areas albeit with a view over a car park. The rest of the town centre is inward facing with blank facades, poor gateways into the town centre, perimeter car parks and unattractive service areas. It is considered that there is considerable potential to enhance the character of the town centre, to enhance the pedestrian environment and improve linkages to ensure that the different areas of the town centre join seamlessly.

6. NEIGHBOURHOOD CENTRES: HEALTHCHECK

6.1 In this section we provide a qualitative assessment of the Neighbourhood Centres as identified in the Harlow Local Plan. In accordance with PPS6, the adopted Local Plan recognises that the vitality and viability of the Neighbourhood Centres should be sustained and enhanced and their position in Harlow's retail hierarchy should be maintained. The distribution of Neighbourhood Centres throughout the District is illustrated on Plan 2.

6.2 The Neighbourhood Centres in Harlow were an important structural component of the New Town Plan. They were intended to be a focal point for neighbourhood clusters with a mix of shopping, social, recreational and employment activities located in the middle of residential groupings of c.20,000 people.

6.3 The local plan acknowledges that shopping habits have changed since the Neighbourhood Centres were designed and built. Shoppers are more mobile and have a greater choice of town centre and out-of-centre comparison and convenience facilities. In particular there is a significant choice of large food superstores in Harlow District that have impacted on the market share of the neighbourhood centres. These include the Tesco, M&S foodhall, Iceland and Asda stores in the town centre, as well as the out-of-centre Tesco and Sainsbury's superstores. Furthermore, both Church Langley and Staple Tye Neighbourhood Centres have since been redeveloped and are now anchored by Tesco and Lidl respectively.

6.4 Nevertheless, the local plan recognises that the Neighbourhood Centres still have an important role to play in providing local facilities for residents and helping to reduce car travel and increase sustainability. Policy RTCS 16 specifically identifies the fact that anchor stores and key facilities should be maintained and that a range of uses should be encouraged. It also states that new opportunities for retail and related uses should be identified in the Neighbourhood Centres.

6.5 Our healthcheck of the Neighbourhood Centres draws largely on detailed audits and on-site surveys carried out by GVA Grimley during April 2006, and updated in January 2007. For each centre we consider the following:

i) Location, physical characteristics and layout of each centre;
ii) The retail composition of each centre;
iii) The range of uses, including community uses and vacancy rates;
iv) The key retailers;
v) The environment and public realm including any key features; and
vi) The centre's accessibility including the level and quality of car parking.

6.6 We also draw on the results of GVA Grimley's household telephone interview survey conducted in April 2006 to highlight people's perceptions and views of the Neighbourhood Centres as places to live, work, shop and visit for a range of uses and activities.

Neighbourhood Centres Ranking

6.7 Our detailed audits have enabled us to provide a comparable indication of the scale and range of retail and other facilities in the five main Neighbourhood Centres, and to specifically record the depth of provision according to key 'retail and community' service indicators. Our analysis is set out in Tables 6.1 and 6.2 below.

Table 6.1: Analysis of Key Retail and Community Service Indicators

	Bush Fair	Church Langley	Old Harlow	The Stow	Staple Tye
Post Office	✓	X	X	✓	✓
Health Centre/Doctors	✓	✓	✓	✓	X
Community Centre	X	✓	X	✓	✓
Anchor Foodstore	✓	✓	✓	✓	✓
Bakery	✓	X	✓	✓	✓
Butcher	X	X	X	X	X
Bank	✓	X	X	X	X
Newsagent	✓	X	✓	✓	✓
Public House	✓	✓	✓	✓	X
Building Society	X	X	X	X	X
Cash Point	✓	✓	✓	✓	✓
Library	X	X	✓	✓	✓
Crèche/Nursery	✓	X	X	X	X
Takeaway/Restaurant	✓	X	✓	✓	✓
Open Space/Park/Play Area	X	X	X	X	X
Church	✓	X	X	X	X

Table 6.2: Estimated Floorspace and Total Unit Numbers

Neighbourhood Centre	Total Floorspace (gross sq m)	Total number of units (all uses)
The Stow	7,448	35
Church Langley	6,396	9
Old Harlow	4,683	35
Bush Fair	4,512	38
Staple Tye	4,486	19
Total	**27,525**	**136**

Source: GVA Grimley Audits of Uses and Floorspace

The Stow

6.8 The Stow opened in 1952 and was the first neighbourhood centre to be developed in the District. It is located approximately 1.5kms to the north east of Harlow town centre at the junction of Howard Way and First Avenue. Howard Way provides the main route into the centre. The Council has ownership of The Stow neighbourhood centre and car park, as well as the former depot at the rear of the Service Bay area

6.9 Based on our audit of The Stow, we estimate that there are 35 retail, leisure and service businesses. In the absence of up to date floorspace information, GVA Grimley has estimated the centre's broad gross floorspace by measuring units on OS base plans. Our survey indicates that the centre comprises c.875 sqm gross of convenience goods retailing, which is equivalent to a net sales area of c.613 sqm. There is also an estimated 1,783 sqm gross of comparison goods retailing.

Table 6.3: The Stow – Mix of Outlets and Floorspace

Use	Number of Units	Floorspace (sq m gross)
Community	9	2,649
Comparison	12	1,783
Convenience	5	875
Leisure	1	213
Service	16	1,822
Vacant	1	106
Total	**35**	**7,448**

Source: GVA Grimley Audits of Uses and Floorspace

6.10 The Stow has a relatively good mix of retail outlets. The main convenience retailers include a Costcutter and a 'One Stop' convenience store, which also comprises a Post Office counter. Both stores sell a range of convenience goods and predominantly serve the top-up food shopping and weekly needs of the centre's local resident population. The remainder of the convenience shopping provision in the centre comprises a baker, a CTN and an Off Licence

6.11 The centre has a diverse choice of comparison goods retail businesses, ranging from a charity shop to wedding and gifts shop. Boots is the only national multiple retailer in the centre. The centre's offer is further underpinned by financial and professional services, along with takeaways/restaurants, a public house and The Stow Leisure Club.

6.12 There are also has eight community and health facilities, including a library, community centre, social club, health centre and dentist. The results of the household telephone interview survey confirm that these facilities are important anchors to the centre's overall offer. The original 1950's health centre at the junction of Howard Way and Minchen Road was completely rebuilt in 2005 and opened in March 2006. The c.£2.2 million redevelopment of Nuffield House includes a doctor's surgery, community nurses and speech and language therapy services. It has been designed to enable the inclusion of a new dental wing in the future.

6.13 Responses to an in-centre survey (Appendix 4) confirmed that the majority of people interviewed were mainly visiting The Stow for their top-up food shopping needs and/or for the Post Office. The Health Centre, dentist and other services were also identified as being the main reason for their visit to the centre.

6.14 The main shops/facilities that respondents normally visit on their trips to The Stow are One Stop/Post Office (72%); Costcutter (43%); Boots (18%); Café Delight (17%); the Health Centre (15%); and Dorringtons Baker (13%). This illustrates the importance of the main convenience stores to the overall vitality and viability of The Stow, as generators of frequent trips, footfall and spend in the shopping precinct itself.

6.15 Based on our audits we consider that there is only one vacant unit in the centre, although two other shops were not open at the time of my visit and had shutters up. There were also a number of other A3 operators that do not open until lunchtime and/or early evening. Assuming one vacant unit, this represents a vacancy level of less than 3%.

6.16 The Stow mainly serves the day-to-day convenience and service needs of its local residents and community. The results of the in-centre survey confirm that some 82% of respondents visit the centre at least once a week. Some 43% indicated that they normally shop in the centre for most of their household's top-up food needs. The household survey results also confirm that none of the respondents carry out their main bulk food purchases in The Stow and 5.9% visit the centre for top-up shopping. The centre also has a number of important community and health facilities that underpin its more local role and catchment, and contribute to its overall vitality and viability.

6.17 Evidence from the in-centre survey confirms that the majority of people interviewed in The Stow live in Harlow District. The in-centre survey confirms that most people like visiting The Stow because it is convenient to where they live and/or work (c.58%). This is indicated by the fact that the centre attracts a significant proportion of walk-in trips (50% of respondents) from its more local catchment, with a further 41% travelling by car, either as a driver or passenger.

6.18 The Stow is not a significant destination for main food shopping, with only 3% of respondents indicating that they carry out their household's main food shop in the centre. The main destinations are the town centre (32%); the edge of centre Sainsbury's store (23%); the Tesco at Church Langley (8%); and the out-of-centre Tesco at East Road (20%).

6.19 Comparisons with the existing discount convenience store in the District, namely Lidl at Staple Tye, also indicate that it is not a significant destination for main food shopping according to the household survey. It is, however, achieving a higher proportion of top-up shopping (8.6%) from within the defined PCA.

6.20 The centre would benefit from new investment to help improve its overall environment and attraction. This is recognised by Policy RTCS18 of the Emerging Local Plan.

6.21 From our visits to The Stow there are no outward signs that shops and businesses in the centre are necessarily failing, although the shopping precinct is clearly in need of improvement and investment. The Inspector also concluded at the Local Plan Inquiry, as part of the Proposed Modifications to Policy RTCS18 of the Plan, that, although The Stow was a little 'tired' in parts, it "*appears to be thriving"* (paragraph 12.17.4).

6.22 The responses to the in-centre survey have confirmed the need to improve The Stow's overall environment. In response to the question as to what people "disliked" about The Stow, the main responses were "gangs/anti-social behaviour"; the "poor environment" (12%); litter/graffiti (8%); "not enough parking" (8%); and the "lack of atmosphere" (8%). Results from the household telephone survey confirm that 77% of people consider The Stow has a pleasant environment. Only 47% of people consider the centre has a safe environment which is the lowest of any of the Neighbourhood Centres.

6.23 Car parking in the Stow is limited with a small car park to the north of the centre although parking on the surrounding streets is unrestricted. Results from the household telephone survey show that 47% of people consider the centre does not have good parking facilities, which is the lowest of any of the Neighbourhood Centres.

6.24 The Stow's vitality and viability is based on the fact that it primarily serves the more frequent needs of its local community and residents, and provides a complementary offer to the other major foodstores in the District.

Bush Fair

6.25 Bush Fair is located to the south east of Harlow town centre and is situated just off Southern Way in a suburb known as Tye Green. It is an inward facing centre and turns its back on the neighbouring areas. Adjacent uses outside of the Neighbourhood Centre boundary include offices, light industrial warehouse units, a large modern health centre, a dentists surgery, a nursery, Tye Green library, a community centre a bowling centre and residential areas.

6.26 Bush Fair is a typical 1950s Neighbourhood Centre with retail and service units on the ground floor with two and three storey residential units above surrounding a large area of concrete open space. The centre is pedestrianised but is poorly configured and not visible from the outside. Instead passers-by view service areas, garages and parked cars from the outside. The centre does not have a dedicated car park, however, there is a large car park adjacent to the Poplar Kitten Public House on the edge of the centre and there is on-street parking on the surrounding roads. It was noted on the site visit that shopkeepers are objecting to pay and display charges being brought in at the centre. Results from the household telephone survey show that 30% of people are unhappy with the parking facilities in the centre.

6.27 Table 6.4 shows that Bush Fair has a total of 4,512 sq m of gross floorspace in 38 units. The centre has a range of services including a Post Office and a Lloyds bank although this is located in a unit which is outside of the Neighbourhood Centre boundary. The local plan recognises that Bush Fair is dated and suffers from a poor quality environment. It states that there is need for improvement and there is potential for partial or full redevelopment.

Table 6.4 Bush Fair: Analysis of Unit Types and Floorspace

Use	Number of Units	Floorspace (sq m gross)
Community	3	635
Comparison	10	967
Convenience	8	806
Leisure	1	592
Misc	3	353
Service	10	878
Vacant	3	281
Total	**38**	**4,512**

6.28 There is a covered pedestrian walkway around the edge of the precinct and some of the shops use this as additional trading space to display their goods. Results from the household telephone survey show that the centre is easily accessible, especially on foot from neighbouring residential areas.

6.29 The physical environment is dated and the public realm is considered poor. Results from the household telephone survey indicate that Bush Fair is considered to have the least pleasant environment of the Neighbourhood Centres and 26% of people do not consider the centre has a safe environment. The large areas of open space are overly exposed and as a result are not well used. The signage, seating and other street furniture is dated and tired looking. The centre is relatively clean and litter bins are distributed throughout. Other facilities include payable public toilets in the pub car park and cycle racks. At the time of the site visit the centre was relatively quiet despite there being a lot of cars parked around the centre and in the pub car park.

6.30 There is a secondary commercial area adjacent to the designated Neighbourhood Centre. This incorporates a range of uses including offices, industrial units as well as a barbers, a kebab shop, a dry cleaners and an Indian takeaway in small-scale workshop type accommodation.

Church Langley

6.31 Church Langley Neighbourhood Centre is located to the east of Harlow town centre, just off the eastern side of the A414. Access is via a roundabout on Church Langley Way. Surrounding uses are predominately residential (see Plan X).

6.32 The Neighbourhood Centre has a total gross floorspace of 6,395 sq m comprising nine units. It is dominated by a 3,637 sq m gross Tesco superstore which opened in 1994. The store is bright and modern and is open 24 hours. It has a wide range of deli counters as well as an in store café. At the time of the site visit had a marquee outside selling garden products and plants.

6.33 The comparison element of the store is relatively extensive and products include CDs, books, cameras, mobile phones and some flat pack garden furniture. The Tesco building also houses four further retail units occupied by a hairdresser, dry cleaners, estate agent and travel agent, which are adjacent to Tesco and well linked to the store.

6.34 The Neighbourhood Centre also contains the Potters Arms Public House, a modern health centre and pharmacy, a community centre and a Tesco petrol station with small shop. There are three cash points outside Tesco as well as a post box. The centre is served by the Tesco car park with 465 spaces.

Table 6.5 Church Langley: Analysis of Unit Type and Floorspace

Use	Number of Units	Floorspace (sq m gross)
Community	2	976
Convenience	2	4750
Leisure	1	669
Service	4	(part of Tesco)
Total	**9**	**6395**

6.35 The centre is physically dominated by the Tesco store and associated car park. Therefore the centre does not have a ‘high street’ environment and instead has the appearance of an out-of-centre foodstore. The whole area is well maintained with extensive soft landscaping and a sculpture adds interest to the environment. Results from the household telephone survey show that people are very happy with the environment in Church Langley with 100% of people finding it both pleasant and safe.

Old Harlow

6.36 Old Harlow is located to the north east of Harlow town centre on either side of the A414 near the junction with Edinburgh Way (Plan X). Access is via Station Road. It occupies a strategic location between the new residential communities emerging on Harlow's east edge and the Northern Corridor. It is also within walking distance of Harlow Mill Train station.

6.37 The centre is a typical pedestrianised High Street and is a descendent of the village high street of the original Harlow settlements. Surrounding uses are predominately one, two and three, storey residential houses with a number of garages to the north. There are a number of car parks in and around the centre although at the time of the site visit these were all full and parking was difficult. Results from the household telephone survey show that 25% of people do not consider the centre has good parking facilities.

6.38 Old Harlow has a total gross floorspace of 4,683 sq m gross comprising 35 units. The centre has a good range of convenience and comparison retailers as well as a wide range of services and some community uses. The anchor foodstore in the centre is a 218 sq m net Somerfield which stocks a good range of convenience goods but no comparison goods. The store is very cramped and at the time of the site visit was very busy and over crowded. Comparison retailing in the centre is limited to two jewellers, a chemist and a charity shop.

6.39 Old Harlow High Street is dominated by service uses and the centre has five estate agents as well as a number of restaurants, hairdressers and a dentist. However, the centre has limited banks or building societies with the only bank being on London Road. Community uses in Old Harlow include a Health Centre and a library, both of which appear to be well used. There is one small vacant unit in the centre.

Table 6.6 Old Harlow: Analysis of Unit Type and Floorspace

Use	Number of Units	Floorspace (sq m gross)
Community	2	786
Comparison	4	425
Convenience	5	688
Leisure	1	188
Residential	2	102
Office	1	103
Service	19	2290
Vacant	1	96
Total	**35**	**4683**

6.40 Old Harlow is distinct from the other Neighbourhood Centres as it is a traditional high street and not a planned centre. Many retail units along the High Street appear tired and run down and in need of investment. Fore Street is an attractive stretch with a number of well maintained distinctive buildings.

6.41 Results from the household telephone survey show that 81% of people consider Old Harlow has a pleasant environment and 63% of people consider it has a safe environment. At the time of the site visit the shops were quiet, although the health centre was busy.

Staple Tye

6.42 Staple Tye is located to the south of Harlow town centre and has direct access from a roundabout off Southern Way, from where it is clearly visible.

6.43 Table 6.6 shows that Staple Tye is the smallest Neighbourhood Centre in Harlow in terms of its gross floorspace (4,555 sq m) and the number of units (18). Staple Tye is a purpose built shopping parade with a covered walkway and is anchored by a Lidl store at one end and a Blockbuster at the other. There is also a drive-thru McDonalds adjacent to Lidl.

Table 6.7 Staple Tye: Analysis of Unit Type and Floorspace

Use	Number of Units	Floorspace (sq m gross)
Community	2	722
Comparison	2	330
Convenience	4	1780
Misc	1	89
Service	9	1475
Vacant	1	87
Total	**19**	**4486**

6.44 The centre has a large area of free surface car parking with approximately 120 car parking spaces including a designated disabled area. Results from the household telephone survey show that the majority of people are happy with the car parking provision. There is also a taxi rank and there is a pedestrian subway and cycle track under Southern Way.

6.45 Adjacent uses include a library, a community hall, a secondary school, a health centre as well as residential areas. There is also a BP petrol station with a Safeway forecourt shop located along Southern Way leading to neighbouring residential areas. The centre has undergone partial regeneration in recent years with the majority of the shops re-built in a parade facing the car park, which has improved the centre and its offer.

6.46 Staple Tye has a good range of retail and service uses and provides essential services such as a Post Office and cash point. At the time of the site visit there was one vacant unit. The centre has a range of uses which are open in the evening including an off licence, various takeaways and McDonalds (which is open until 11pm). The centre was busy at the time of the site visit.

6.47 The shopping environment is clean and the physical appearance of the buildings is good. There are cycle racks and street lighting, but seating is limited. The centre is monitored by a CCTV system and there are payable public toilets. We consider that the shopping environment could be improved with additional and more interesting landscaping. Results from the household telephone survey show that 76% of people consider Staple Tye has a pleasant environment and 71% of people consider it has a safe environment.

6.48 To the west of Staple Tye, beyond the Neighbourhood Centre boundary, there is an area of commercial activity called Staple Tye Shopping Mews. This is secondary to the main Neighbourhood Centre and has a similar relationship, in terms of its location, to the secondary commercial area adjacent to Bush Fair Neighbourhood Centre. This area comprises a range of ad hoc uses such as an estate agents, Indian and Chinese restaurants as well as a significant number of vacant and boarded up units. Some of the units are only open in the evenings creating ‘dead’ frontages during the day. The brick buildings are older than the main Neighbourhood Centre and the units are small and poorly configured. The buildings and the public realm do not meet the same standards of quality as the main Neighbourhood Centre and the pedestrian links between the two areas are poor.

6.49 There are still a number of smaller shops remaining that do not meet the same standards of quality, an ageing and obsolete health centre, a small employment district with an *ad hoc* range of businesses and poor pedestrian connections to the centre overall.

Summary

6.50 The Neighbourhood Centres are an important part of the retail hierarchy in Harlow providing a range of retail, service and community uses. Policy RTCS17 of the local plan seeks to ensure that key facilities and a range of shops are retained in the Neighbourhood Centre.

6.51 The centres provide an essential convenience offer that consists of a main convenience store complemented by a limited range of smaller independent retailers. Each Neighbourhood Centre has a bakery and four of the centres have a newsagent. The size of the anchor foodstore in each centre varies from the large Tesco at Church Langley to the Co-Op at Bush Fair.

6.52 The provision of financial services varies between the centres. None of the Neighbourhood Centres have a building society and Bush Fair is the only centre with a bank. However, there is a cash point in each of the centres. With the exception of Staple Tye, all of the

Neighbourhood Centres have a public house as well as a range of takeaways and cafes. The Neighbourhood Centres provide essential services such as pharmacies, dry cleaners and laundrettes. Vacancy rates are generally low.

6.53 As you would expect of centres at this lower level in the retail hierarchy, comparison retailing is limited. Bush Fair and The Stow have a small amount of comparison retailing consisting of small independent, specialist retailers such as jewellers, pet shops, florists and ironmongers. Church Langley, Old Harlow and Staple Tye have a more restricted range.

6.54 The Neighbourhood Centres are complemented by a mix of community uses including health centres, community halls, libraries and dentists. These are often outside of the defined Neighbourhood Centre boundary but are within walking distance of each centre. Old Harlow, The Stow and Staple Tye have a library within their boundaries. Staple Tye is the only centre that does not have a health centre/doctors surgery within its boundary. Bush Fair is the only centre with a church within its boundary.

6.55 The environmental and physical characteristics of the centres vary. Bush Fair and The Stow are the oldest Neighbourhood Centres built in the 1950s. They are inward facing centres with residential units on the upper floors. They suffer from poor public realms, dated street furniture, large areas of underused open space and unattractive service yards. Church Langley is essentially an out-of-town foodstore with ancillary retail units. Old Harlow consists of a pedestrianised high street and is a descendent of the village high street from the original settlement of Harlow. Staple Tye has undergone partial regeneration in recent years and consists of a purpose built shopping parade with a covered walkway and a large expanse of surface car parking, which is well used.

6.56 Overall, the Neighbourhood Centres are well used and are an essential part of the retail hierarchy in Harlow. It is considered that the centres could be enhanced with public realm improvements. This would in turn make the centres more attractive to operators. Bush Fair and The Stow would benefit from more comprehensive regeneration as highlighted in local plan policy RTCS18. Potential development opportunities are discussed in Section 10.

7. HATCHES: HEALTHCHECK

7.1 In this section we provide a qualitative assessment of the Hatches. In accordance with PPS6, the adopted Local Plan recognises that the vitality and viability of the Hatches should be sustained and enhanced and that their position in Harlow's retail hierarchy should be maintained. The location of the Hatches are illustrated on Plan 2.

7.2 The Hatches in Harlow were an important structural component of the New Town Plan. They were intended to provide services to residents within a five or ten minute walking radius. Hatches typically include two or three shops and a local community or health centre. Results from the household telephone survey, which specifically asked peoples opinions of the Hatches, are set out in Appendix 3. We refer to the survey results where relevant.

7.3 As with the previous section our healthchecks draw largely on our detailed audits and on-site surveys conducted during April/May 2006. For each centre we consider the following:

i) Location, physical characteristics and layout of each centre;
ii) The retail composition of each centre;
iii) The range of uses, including community uses and vacancy rates;
iv) The key retailers;
v) The environment and public realm including any key features; and
vi) The centre's accessibility, including the level and quality of car parking.

Ranking of Hatches

7.4 Our detailed audits enabled us to provide a comparable indication of the scale and range of retail and other facilities to record the depth of provision according to key 'retail and community' service indicators in the Hatches. A similar methodology was adopted as used for the Neighbourhood Centres in Section 6 and is set out in Tables 7.1 and 7.2.

7.5 Table 7.1 shows that the choice of facilities in each Hatch varies. Table 7.2 also shows that the quantum of floorspace and outlets ranges from circa 1,359 sq m gross for Prentice Place to 220 sq m gross for Mill. We consider the health and relative viability of each Hatch in more detail below.

Table 7.1 Analysis of Key Retail and Community Service Indicators

	Burgogyne	Cawley	Clifton	Colt	Coppice	Elm	Fishers	Katherines	Manor
Post Office	X	X	X	X	X	X	X	X	X
Health Centre/Doctors	X	X	X	X	X	X	X	X	X
Community Centre	X	X	X	X	✓			✓	
Convenience Foodstore	✓	X	X	✓	X	✓	✓	✓	✓
Bakery	X	X	X	X	X	X	X	X	X
Butcher	X	X	X	X	X	X	X	X	X
Bank	X	X	X	X	X	X	X	X	X
Newsagent	X	X	✓	X	✓	✓	X	✓	X
Public House	✓	X	X	X	✓	✓	✓	X	X
Building Society	X	X	X	X	X	X	X	X	X
Cash Point	X	X	X	X	X	X	✓	X	X
Library	X	X	X	X	X	X	X	X	X
Crèche/Nursery	X	X	X	X	X	X	X	X	X
Takeaway/Restaurant	✓	✓	✓	✓	X	X	✓	✓	X
Open Space/Park/Play Area	X	X	X	X	X	X	X	X	X
Church	X	X	X	X	X	X	X	X	X

	Maunds	Mill	Pollard	Prentice Place	Pypers	Sherards	Slacksbury	Sumners	Ward
Post Office	X	X	X	✓	X	X	X	X	X
Health Centre/Doctors	X	X	X	✓	✓	X	X	X	X
Community Centre	✓	X	X	X	X	✓	X	X	X
Convenience Foodstore	✓	X	✓	✓	X	✓	✓	✓	✓
Bakery	X	X	X	✓	X	X	X	X	X
Butcher	X	X	X	X	X	X	X	X	X
Bank	X	X	X	X	X	X	X	X	X
Newsagent	X	✓	✓	✓	X	X	X	X	X
Public House	X	X	X	✓	✓	✓	X	✓	✓
Building Society	X	X	X	X	X	X	X	X	X
Cash Point	X	X	X	X	X	X	X	X	X
Library	X	X	X	X	X	X	X	X	X
Crèche	X	X	X	X	X	X	X	X	X
Takeaway/Restaurant	X	✓	✓	✓	✓	X	✓	✓	✓
Open Space/Park/Play Area	X	X	X	X	X	X	X	X	X
Church	X	X	X	X	X	X	X	X	X

Source: GVA Grimley Audits of Centres, 2006

Table 7.2 Estimated Floorspace and Total Unit Numbers

Hatch	Total Estimated Gross Floorspace (sq m)	Total number of units (all uses)
Prentice Place	1,359	12
Sumners	994	4
Fishers	770	5
Burgoyne	722	4
Sherards	664	3
Colt	662	6
Coppice	579	4
Cawley	465	5
Pypers	443	4
Maunds	419	2
Clifton	407	5
Pollards	407	4
Katherines	377	4
Elm	369	3
Slacksbury	362	7
Ward	328	3
Manor	262	2
Mill	220	4

Source: GVA Grimley Audits of Centres, 2006

Burgoyne Hatch

7.6 Burgoyne Hatch is located to the east of Harlow town centre and to the west of the A414. Access is via Momples Road. Adjacent uses include one and two storey residential houses, a playing field, playground and Harefield Church. The Hatch is served by a free car park with 10 spaces. On the day of the site visit the car park was full and there were also people arriving on foot.

7.7 Burgoyne Hatch has a total gross floorspace of 722 sq m comprising four units. The largest building is the Purple Emperor Public House. The three other units are occupied by a convenience store, a barbers and a Chinese takeaway. The convenience store stocks a reasonable range of everyday convenience goods although the store is cramped and run down.

Table 7.3 Burgoyne Hatch: Analysis of Unit Type and Floorspace

Occupier	Activity	Floorspace (sq m gross)
B&U Convenience Store	Convenience	169
Sub Total Convenience		169
Purple Emperor Pub	Leisure	242
Sub Total Leisure		411
Barbers	Service	66
Chinese Takeaway	Service	76
Sub Total Service		142
TOTAL	**4**	**722**

7.8 Unlike many of the other Hatches the units do not face onto the road as they are set back facing onto a small paved area with a bench. The Hatch feels run down and unkempt, particularly the Public House and all the frontages are in need of investment. The adjacent playground is also disused and run down. The hatch would benefit from environmental improvements and the public realm needs upgrading.

Cawley Hatch

7.9 Cawley Hatch is located to the west of Harlow town centre along Elizabeth Way, one of the main routes around Harlow. The Hatch is set adjacent to an industrial business park. There is also a Total garage next to the Hatch with a small shop. Table 7.4 indicates that it has a total of 465 sq m of gross floorspace and comprises a mix of service and vacant uses. There are two cafés and a betting shop.

Table 7.4 Cawley Hatch: Analysis of Unit Type and Floorspace

Occupier	Activity	Floorspace (sq m gross)
Little Piggy's Pantry	Service	65
Top Café	Service	65
Tote Sport Betting	Service	70
Sub Total Service		201
Vacant Convenience Store	Vacant	70
Vacant Club	Vacant	194
Sub Total Vacant		264
TOTAL	**5**	**465**

7.10 The Hatch mainly serves the population of the surrounding industrial area and drivers passing by. There is an area of free surface car parking to the front of the Hatch which is well used. The Hatch itself is a fairly unattractive flat roofed building. There are no signs of recent investment, paint is peeling from the railings and the shop units are fairly unattractive and do not provide active frontages. The vacant club is also overgrown and the windows are boarded up. The traffic from the main road also impacts negatively on the environmental quality of the Hatch and there is no soft landscaping.

Clifton Hatch

7.11 Clifton Hatch is located to the south of Harlow town centre on Trotters Road just off Southern Way in the Latton Bush area of the town. Adjacent uses are mainly two-storey residential units. The Hatch is set back from the road with an area of surface car parking. The access into the Hatch has been restricted with a barrier to prevent cars from driving into the Hatch at high speed.

7.12 Table 7.5 shows that there is a total of 407 sq m of gross floorspace, comprising five units. Half of the commercial units are vacant and run down. The two active uses are a Chinese takeaway and a newsagents. The community centre looks unused and was not open at the time of the site visit.

Table 7.5 Clifton Hatch: Analysis of Unit Type and Floorspace

Occupier	Activity	Floorspace (sq m gross)
Newsagents	Convenience	30
Sub Total Convenience		30
Chinese & Fish T/A	Service	63
Sub Total Service		63
Vacant (former convenience store)	Vacant	95
Vacant (former Happy Shopper Mini-Market)	Vacant	94
Vacant & no longer in use as community centre.	Vacant	124
Sub Total Vacant		314
TOTAL	**5**	**407.27**

7.13 The Hatch is fairly run down and does not display any signs of recent investment. The Hatch itself is a typical single storey flat roofed building. The public realm is poor, unattractive and there is no planting, greenery or seating. There is no CCTV. At the time of the site visit, the Hatch was not very busy. There were a few people stopping off to visit the newsagents and there were teenagers hanging around outside indicating that the centre has become a node for anti-social behaviour.

Colt Hatch

7.14 Colt Hatch is located to the north west of Harlow town centre and is accessed from Elizabeth Way. It is a single storey flat roofed building, typical of the other Hatches in Harlow, situated in a residential area and positioned at right angles to Hobtoe Road. There are approximately 10 car parking spaces in front of the Hatch and there is a cycle rack. There is a redundant space to the side of the Hatch with additional car parking and recycling facilities but which is likely to be used for servicing and deliveries. The surrounding area comprises a mix of residential uses including an eight storey block of flats and two storey terraces. On Hobtoe Road there is also a Public House, a Chapel and a primary school.

7.15 Table 7.6 indicates it has a total of 662 sq m of gross floorspace and comprises six units. The largest unit is a Co-Op convenience store which is open until 10pm and contains a LINK cash machine. Other uses include a Chinese takeaway, a dry cleaners, a hair salon and dog grooming parlour. There is a also a community centre which was closed during the day of the site visit but is open during the evening with a bar.

Table 7.6 Colt Hatch: Analysis of Unit Type and Floorspace

Occupier	Activity	Floorspace (sq m gross)
Community Centre	Community	229
Sub Total Community		229
Co-Op	Convenience	211
Sub Total Convenience		211
Doggy Style Grooming	Service	56
Dry Cleaners	Service	56
Fish & Chips/Chinese T/A	Service	59
Hair Salon	Service	51
Sub Total Service		222
TOTAL	**6**	**662**

7.16 The Hatch is surrounded by a small area of average quality green open space, there is a small border with some soft landscaping and there is an art sculpture. There is a telephone box to the side of the Hatch but this has been vandalised. The rear of the Hatch is unattractive with fencing to prevent vandalism and there is some rubbish to the front of the Hatch outside the Co-Op store. There is some street lighting.

Coppice Hatch

7.17 Coppice Hatch is located to the south of Harlow town centre. It is accessed from Southern Way and is situated on the corner of Tendring Road and Partridge Road. The surrounding area consists of residential units with a mix of low rise flats and two storey houses and there is a primary school to the south. There is free surface car parking for approximately eight cars and there is a bus stop opposite the Hatch.

7.18 Table 7.7 shows that the Hatch has a total of 578 sq m of gross floorspace consisting of four units. There is a pub, two newsagents and a Common Room/pre-school. There is a Salvation Army Hall opposite the Hatch. The main building in the Hatch is a two-storey brick building that has been painted white. There are residential uses above. There is a CCTV camera on the pub overlooking the car park and there is limited landscaping.

Table 7.7 Coppice Hatch: Analysis of Unit Type and Floorspace

Occupier	Activity	Floorspace (sq m gross)
Common Room/Pre-School	Community	110
Sub Total Community		110
Newsagents	Convenience	120
Newsagents	Convenience	120
Sub Total Convenience		240
The Archers Draft Public House	Leisure	228
Sub Total Leisure		228
TOTAL	**4**	**578**

Elm Hatch

7.19 Elm Hatch is located to the east of Harlow town centre and lies just to the south of Second Avenue. The Hatch is located in a quiet residential area. The hatch suffers from poor visibility and weak connections to surrounding area, which could threaten its long-term sustainability although adjoining residential areas are dense. The adjacent housing is all two storey although there is a 14 storey block of flats nearby. Harlow Town Centre lies to the north of the Hatch. Although there is no designated car parking area there is plenty of free on street parking.

7.20 Elm Hatch has a total floorspace of 369 sq m gross comprising three units. The Humming Bird Public House occupies the largest building with the Newsagent and Premier Mini Market occupying similar size units. There is an ATM inside the Premier mini market.

Table 7.8 Elm Hatch: Analysis of Unit Type and Floorspace

Occupier	Activity	Floorspace (sq m gross)
Newsagent	Convenience	95
Premier Mini Market	Convenience	93
Sub Total Convenience		188
Humming Bird Pub	Leisure	180
Sub TotalLeisure		180
TOTAL	**3**	**369**

7.21 The two retail units are flat roofed single storey buildings typical of other Hatches. The Public House however has a distinctive style which adds interest to the area and gives the Hatch a distinctive feel. There are also a number of historical, attractive buildings immediately surrounding the Hatch, including the Study Centre. To the front of the retail units there is a border with soft landscaping which again adds interest and colour to the area. The overall environment of the Hatch is considered to be good.

Fishers Hatch

7.22 Fishers Hatch is one of the closest to Harlow town centre and lies just to the east of Maddox Road. Surrounding uses are predominantly two storey residential with a primary school lying to the north east. There is also a church to the north west. The Hatch is served by free on street car parking although the road is busy making stopping difficult.

7.23 The Hatch has a total gross floorspace of 769 sq m comprising five units. The largest building is the Council Offices with McColls Convenience store occupying the largest retail unit. Other uses in the Hatch include the Garden Tiger Public House, a bookmakers and a fish and chip shop. There is an outside ATM machine. The Council Offices are separate from the rest of the Hatch and its access is via a different street.

Table 7.9 Fishers Hatch: Analysis of Unit Type and Floorspace

Occupier	Activity	Floorspace (sq m gross)
McColls Convenience Store	Convenience	122
Sub Total Convenience		122
The Garden Tiger Pub	Leisure	222
Sub Total Leisure		222
Council Offices	Offices	332
Sub Total Offices		332
Bookmakers	Service	39
Fish & Chip Shop	Service	55
Sub Total Service		93
TOTAL	**6**	**770**

7.24 The retail units are single storey flat roofed buildings, typical of other Hatches. The retail frontages are run down and in need of investment, particularly the Public House. The fairly heavy traffic impacts negatively on the environmental quality of the area.

Katherines Hatch

7.25 Katherines Hatch is located south west of Harlow town centre close to the outer boundary of the local authority area. It is situated in a prominent position on Brookside Road which is just off Katherine's Way. The surrounding area is predominantly residential with two storey semi-detached and terraced housing; there is a primary school adjacent to the Hatch and a block of three storey flats to the rear. There is a bus stop directly outside the Hatch and there are six free car parking spaces to the side of the Hatch, as well as recycling facilities.

7.26 It has an estimated 377 sq m of gross floorspace, comprising four units. As shown in Table 7.10 below, the main commercial use is a Premier convenience store. There is also a newsagents, a Chinese takeaway and a Common Room (community centre). Other facilities include a post box and a phone box.

Table 7.10 Katherines Hatch: Analysis of Unit Type and Floorspace

Occupier	Activity	Floorspace (sq m gross)
Common Rom	Community	136
Sub Total Community		136
Premier Convenience Store	Convenience	144
Newsagents	Convenience	49
Sub Total Convenience		192
Chinese T/A	Service	49
Sub Total Service		49
TOTAL	**4**	**377**

7.27 In general, the Hatch is well maintained and the public realm is considered to be good. The retail units are single storey and there is a large area of paving directly in front of the units. There are some planters but these are empty. The Hatch lacks the presence of active frontages as the windows of the Premier convenience store are blocked with adverts and the Chinese takeaway is shut up during the day. It is well linked to surrounding residential areas and the majority of people are likely to walk to the centre. It does not appear to be covered by CCTV. It is understood that the Council are looking at options to redevelop Katherines Hatch.

Manor Hatch

7.28 Manor Hatch is located to the south east of Harlow town centre, between Southern Way, Second Avenue and the A414. Access is via Tumbler Road. Adjacent uses are predominately one, two and three storey residential, and the Harlow Pentecostal Church is located to the rear of the shops. The Hatch is served by only three off-street car parking spaces and there is plenty of on street parking. There were also people arriving at the stores on foot.

7.29 It has a total floorspace of 262 sq m gross comprising two units. The Co-op store has a gross floorspace of 175 sq m and was originally three units. The Co-op provides a good range of everyday convenience needs including groceries, alcoholic drinks and newspapers/ magazines. The only other provision in the Hatch is a glazing and decorating contractor. The Hatch also has a public phone box.

Table 7.11 Manor Hatch: Analysis of Unit Type and Floorspace

Occupier	Activity	Floorspace (sq m gross)
Co-op Convenience Store	Convenience	175
Sub Total Convenience		175
Glazing & decorating contractors	Service	87
Sub Total Service		87
TOTAL	**2**	**262**

7.30 The Co-Op convenience store dominates this Hatch with its bright and modern frontage. The retail units are flat roofed, single storey, and typical of other Hatches. Around half of the Hatch is an area of open grass, which although well maintained has no further soft landscaping. Tumbler Road, on which the Hatch lies, has traffic calming measures as well as a zebra crossing.

Maunds Hatch

7.31 Maunds Hatch is located on the southern edge of Harlow and is on the junction of Commonside Road and Paringdon Road. It is situated on the edge of a residential area and is in close proximity to a primary and secondary school. The main Hatch building is a two-storey flat roofed building with residential uses on the upper floors above the commercial units, which are accessed to the side and the rear of the Hatch. There is an area of derelict land to the south of the Hatch. It is understood that the Council are working on options to redevelop Maunds Hatch and the vacant area of land to the south of the Hatch has been sold to fund the redevelopment. This is discussed further in Section 10.

7.32 Table 7.12 below shows that the Hatch has a total of 419 sq m of gross floorspace and comprises two units. The largest unit is a Premier convenience store which incorporates an off-licence, and the other unit is a pre-school, which did not appear to be in active use at the time of the site visit. There are approximately eight free car parking spaces outside of the Hatch.

Table 7.12 Maunds Hatch: Analysis of Unit Type and Floorspace

Occupier	Activity	Floorspace (sq m gross)
Pre-School	Community	157
Sub Total Community		157
Premier Convenience Store	Convenience	262
Sub Total Convenience		262
TOTAL	**2**	**419**

7.33 On the opposite side of Commonside Road there is a large area of attractive, well maintained and secure open space. This is easily accessed from the Hatch by crossing over Commonside Road which has traffic calming measures. The open space is well used for sports and other recreational activities and incorporates a new children's playground, seating and planting. The Harlow and District Chinese Community Centre is also located here. The building overlooks the open space and is well maintained and has good lighting and CCTV. There is also a Chinese restaurant adjacent to the recreation area which is set back from the road and is located in an older building with a distinct architectural style.

7.34 The public realm of the Hatch itself is clean, there is minimal planting and soft landscaping but the environment is enhanced by the adjacent open space. The Hatch also has recycling facilities, a phone box, a post box and CCTV.

Mill Hatch

7.35 Mill Hatch is located just off the northern side of Edinburgh Way. The Hatch is clearly visible from the main road and can be easily accessed via Edinburgh Place. Adjacent uses include light industrial units, a Health Centre and a petrol filling station. The Hatch is served by 20 free parking spaces, which on the day of the site visit were half full. There was no evidence of people walking to the area which is to be expected given its location next to a busy main road and away from residential areas.

7.36 The Hatch has a total floorspace of 219 sq m gross comprising four retail units. As shown in Table 7.13 below, the largest unit is currently a café with three smaller units occupied by a bookmakers, newsagents and a tiles & blinds retailer. There are no vacant units. Although the centre has no leisure or community uses there is a Health Centre directly opposite the Hatch. There is also a post box.

Table 7.13 Mill Hatch: Analysis of Unit Type and Floorspace

Occupier	Activity	Floorspace (sq m gross)
Tiles & Blinds	Comparison	45
Sub Total Comparison		45
Newsagent	Convenience	44
Sub Total Convenience		44
Bookmakers	Service	42
Café	Service	89
Sub Total Service		131
TOTAL	**4**	**220**

7.37 Although somewhat dated, Mill Hatch is clean and tidy although the heavy traffic on Edinburgh Way impacts upon the environmental quality. The retail units are single storey and show little sign of recent investment in their frontages.

Pollard Hatch

7.38 Pollard Hatch is located south west of Harlow town centre and is accessible from both Southern Way and Katherine's Way. The Hatch fronts onto Kingsmoor Road but is set down and thus not fully visible to passers-by. The Hatch itself is a two storey flat roofed building with residential units above. The residential units overhang the commercial units creating a covered walkway.

7.39 To the rear of the Hatch there is free car parking for approximately seven cars, an area of unused and unattractive open space, as well as car parking, garages and gardens for the residential units and servicing and refuse storage for the commercial units. There is a walkway through from the car park to the shops and there are steps and a ramp for pedestrians visiting the Hatch from Kingmoor Road. Surrounding uses are predominantly residential.

7.40 Table 7.14 shows that the Hatch comprises 407 sq m of gross floorspace in four units and comprises a mini-market, a newsagents, a Chinese takeaway and a pre-school.

Table 7.14 Pollard Hatch: Analysis of Unit Type and Floorspace

Occupier	Activity	Floorspace (sq m gross)
Pre-School	Community	121
Sub Total Community		121
Mini-Market	Convenience	106
Newsagents	Convenience	95
Sub Total Convenience		201
Chinese T/A	Service	85
Sub Total Service		85
TOTAL	**4**	**407**

7.41 There is an area of uninteresting planting between the road and the Hatch. The Hatch's set down position and orientation creates a feeling of enclosure and reduces visibility into adjacent areas. There is limited street lighting and the Hatch does not appear to benefit from CCTV.

Prentice Place Hatch

7.42 Prentice Place Hatch lies to the south east of Harlow town centre on the eastern side of the A414. Access is via Potter Street. Adjacent uses include a community centre, a Baptist Church and residential uses ranging from two to eight storeys in height. The retail units are below two storey maisonettes. The Hatch is served by a free car park with 18 spaces, the car park was full at the time of the site visit.

7.43 The Hatch has a total floorspace of 1,358 sq m gross, comprising 12 units, making it the largest hatch by a considerable margin. As shown in Table 7.15 below, the largest retail unit is occupied by Premier Supermarket which stocks a good range of everyday convenience goods and was very busy at the time of the site visit. The Hatch is also served by a Post Office, Pharmacy, Doctors Surgery and Public House.

Table 7.15 Prentice Place Hatch: Analysis of Unit Type and Floorspace

Occupier	Activity	Floorspace (sq m gross)
Pharmacy	Comparison	75
Sub Total Comparison		75
Baker	Convenience	38
Convenience Store	Convenience	47
Premier Supermarket	Convenience	192
Sub Total Convenience		211
Red Lion Pub	Leisure	288
Sub Total Leisure		228
Post Office	Misc	50
Public Convenience	Misc	37
Sub Total Misc		87
Bookmakers	Service	88
Chinese takeaway	Service	69
Doctors Surgery & Health Centre	Service	344
Fish & Chip Shop	Service	65
Hair & Beauty salon	Service	65
Sub Total Service		631
TOTAL	**12**	**1359**

7.44 Prentice Place Hatch as a whole is well maintained although its appearance is a little dated and a number of the shop fronts are in need of investment. The Hatch has a large pedestranised area to the front with lighting and litter bins and a large tree adds greenery and interest to the site. It is understood that the Council are looking at options to redevelop Prentice Place Hatch.

Pypers Hatch

7.45 Pypers Hatch lies on Maddox Road and is located to the east of Harlow town centre, just north of Second Avenue. Surrounding uses are predominately two storey residential terrace houses. The Hatch is served by plenty of free on-street car parking with around four spaces set off of the main road. There are no traffic claming measures or crossings, which create barriers to pedestrian movements around the centre. On the site visit there was a mixture of shoppers arriving on foot and by car, although it was very quiet.

7.46 The Hatch has a total floorspace of 443.13 sq m gross comprising four units. The largest unit is the Heart and Club pub with the remaining units being occupied by a pharmacy, Chinese takeaway and a hair and beauty salon. The Hatch itself has no community uses although there is a doctors surgery backing onto the retail units which is accessed off Monkswick Road. There are no vacant units.

Table 7.16 Pypers Hatch: Analysis of Unit Type and Floorspace

Occupier	Activity	Floorspace (sq m gross)
Pharmacy	Comparison	68
Sub Total Comparison		68
Heart & Club Pub	Leisure	285
Sub Total Leisure		285
Chinese T/A	Service	41
Hair & Beauty Salon	Service	50
Sub Total Service		90
TOTAL	**4**	**443**

7.47 The retail units are dated but well maintained and the pub is well kept and has some soft landscaping to the front. The retail units are single storey and flat roofed, typical of the other Hatches.

Sherards Hatch

7.48 Sherards Hatch is located south of Harlow town centre in the Kingsmoor area of the town's suburbs. It is situated in a residential area comprising a mix of housing types ranging from semi-detached houses to four storey blocks of flats. The Hatch is situated at the bottom of a hill on the junction of Ployters Road and Paringdon Road.

7.49 As can be seen from Table 7.17 Sherards Hatch comprises 664 sq m of gross floorspace in three units. There is a Premier convenience store with residential uses above, which is complimented by a Public House and a community centre. The Public House is a tall and distinctive building.

Table 7.17 Sherards Hatch: Analysis of Unit Type and Floorspace

Occupier	Activity	Floorspace (sq m gross)
Common Room	Community	156
Sub Total Community		156
Premier Convenience Store	Convenience	224
Sub Total Convenience		224
PH- The Drinker Moth	Leisure	285
Sub Total Service		285
TOTAL	**3**	**664**

7.50 Sherards Hatch has approximately 10 free car parking spaces and there is a bus stop along Ployters Road. The public realm is relatively clean and pleasant and the shopfronts are well maintained. There is an area of grass in between the Hatch and the road, and to the rear, that is well maintained but there is no further soft landscaping. There is no evidence of CCTV in the Hatch.

Slacksbury Hatch

7.51 Slacksbury Hatch is located to the south west of Harlow town centre and is accessed from Third Avenue. The Hatch is situated on the corner of Helions Road and Harberts Road. With the exception of the Fish Bar, all of the units face onto Helions Road. Helions Road has a gentle gradient and as a result the Hatch is set up from the road and incorporates level changes. The Hatch does not have any dedicated car parking, however there is a small lay-by and on-street parking along Helions Road. However, parking is difficult due to the traffic calming measures and the gradient of the road. There is also on-street parking and a bus stop on Harberts Road.

7.52 Surrounding uses comprise the Trinity Presbyterian Church, a primary school and a family health centre along Harberts Road. There is also a recreation area with tennis courts and a playing field. The majority of the neighbouring residential units consist of bungalows and two storey terraced and semi-detached housing.

Table 7.18 Slacksbury Hatch: Analysis of Unit Type and Floorspace

Occupier	Activity	Floorspace (sq m gross)
Premier Convenience Store	Convenience	74
Sub Total Convenience		74
Chinese T/A	Service	40
Fish Bar	Service	78
Hairdressers – possibly vacant	Service	38
Sub Total Service		155
Vacant	Vacant	62
Vacant	Vacant	35
Vacant	Vacant	35
Sub Total Vacant		132
TOTAL	**7**	**362**

7.53 Table 7.18 indicates that Slacksbury Hatch comprises a total of 362 sq m of gross floorspace in seven units. There is a Premier convenience store which is complimented by a hairdressers, a Chinese takeaway and a fish and chip shop. In addition there is a pub opposite the Hatch which has a private car park. Approximately one-third of the units are vacant.

7.54 The physical appearance of the Hatch is poor. The Hatch building lacks recent investment and the vacant units create a feeling of neglect. On the day of the site visit, there was also waste from the shop units in front of the Hatch and the bus stop and shop shutters had graffiti. There is a small area of open space on the corner of the Hatch where there is some planting, as well as some seating and recycling facilities. The environment could be improved with cosmetic improvements such as new paint work. The convenience store has dedicated CCTV but this does not cover the whole of the Hatch.

Sumners Hatch

7.55 Sumners Hatch is located in a residential area on the outskirts of southern Harlow close to the outer boundary of the local authority area. Sumners Hatch is clearly visible from Broadley Road, which benefits from traffic calming and well lit cycle paths linking the Hatch with the surrounding residential areas. The Hatch is a red brick single storey building with a sloping roof which overhangs the building creating a covered pedestrian walkway. The Hatch is separated from the road by a grass area and border landscaping.

7.56 There is a bus stop outside of the Hatch and there are approximately six car parking spaces in front of the Hatch. The Herald Public House is an attractive building and has an outdoor seating area to the front and its own dedicated parking area to the rear. As can be seen from

Table 7.19, Sumners Hatch has a total of 994 sq m of gross floorspace and comprises four units. There is a small convenience store, a pharmacy, a Chinese takeaway and a Public House. There is also a recycling area, phone box and post box.

Table 7.19 Sumners Hatch: Analysis of Unit Type and Floorspace

Occupier	Activity	Floorspace (sq m gross)
Vantage Pharmacy	Comparison	174
Sub Total Comparison		174
Food & Wine Store	Convenience	172
Sub Total Convenience		172
The Herald Public House	Leisure	479
Sub Total Leisure		479
Chinese	Service	168
Sub Total Service		168
TOTAL	**4**	**994**

7.57 On the opposite side of Broadley Road there is a complex of community uses including a primary school, a nursery school, a health centre and leisure centre comprising a sports hall and community rooms and a park with playing fields. The complex is well served by a large amount of surface car parking.

Ward Hatch

7.58 Ward Hatch is located south of Edinburgh Way to the east of Harlow town centre. Access is via Mowbray Road. Adjacent uses include residential (predominately two storey), the Christian Science Church, Tany Dell Primary School and a park. The Hatch is served by free car parking with space for five vehicles. There are traffic calming measures and zebra crossings either side of the parade making the shops easily accessible on foot. There is also a cycle track running across the park behind the Hatch and there is designated space to lock bicycles directly outside the retail units.

7.59 The Hatch has a total floorspace of 328 sq m gross comprising three units. The largest unit is the White Admiral Pub which is complimented by a Chinese Takeaway and Jads Convenience Store. The Convenience store is cramped and dated but stocks a good range of everyday goods including groceries, newspapers, the Lottery and off-license drinks. There are no vacant units.

Table 7.20 Ward Hatch: Analysis of Unit Type and Floorspace

Occupier	Activity	Floorspace (sq m gross)
Jads Convenience Store	Convenience	112
Sub Total Convenience		112
White Admiral Pub	Leisure	146
Sub Total Leisure		146
Chinese Takeaway	Service	71
Sub Total Service		71
TOTAL	**3**	**328**

7.60 The retail units are single storey with no residential above. Although they are somewhat dated and run down the area has a pleasant environmental quality with the adjacent park being well landscaped and maintained.

Summary

7.61 There are 18 Hatches in Harlow providing essential services for local residents. The quality and offer of the Hatches varies considerably ranging 220 from sq m to 1,358 sq m of floorspace and from two to 12 units. The Hatches provide services to residents and typically include a mix of retail and service uses and a community centre and/or public house.

7.62 The most common uses found in the Hatches are local convenience stores, takeaways, newsagents and public houses. Other uses include hairdressers, specialist retailers and service providers such as a Tile and Blind store, cafes and a pet grooming parlour. The Hatches also provide services such as recycling facilities, post boxes and telephone boxes. They include or are located in close proximity to community uses such as churches, health centres and schools, which provides opportunities for linked trips. Some also have large areas of open space for sporting and recreational activities.

7.63 The Hatches have good accessibility, linkages and connections to surrounding residential areas. Many have dedicated car parking and cycle racks as well as being located close to local bus services and within walking distance of local resident populations. Although it should be noted that some of the Hatches suffer from their proximity to roads by way of noise and pedestrian accessibility.

7.64 The majority of the Hatches are single storey flat roofed buildings. Many of the shop units lack active frontages and are blocked with adverts and takeaways are often shut up during the day. Many of the community centres appear to be underused and suffering from a lack of investment. The majority of the Hatches would benefit from some form of investment to ensure their continued long-term viability. In particular, Burgoyne, Cawley, Clifton and Slacksbury Hatches would benefit from environmental improvements and upgrades to the public realm such as more soft landscaping, CCTV and improved street lighting.

8. RETAIL CAPACITY ASSESSMENT

8.1 This section sets out the key assumptions and outputs of our quantitative need (capacity) assessment. It provides forecasts of the potential residual comparison and convenience spend available in the Harlow survey area to support new additional retail floorspace over the forecast period. The more detailed capacity tables informing this assessment are set out in Appendices 5 and 6.

8.2 In order to provide robust and sound baseline evidence as part of the LDF process, we have necessarily drawn on the bespoke household telephone interview survey specifically commissioned for the Town Centre Strategy. We have also drawn on existing published data and forecasts to inform and test the sensitivity of our retail capacity assessment. In this case we have used the same baseline data and projections tested as part of the Town Centre Strategy (such as, for example, the expenditure and population figures/projections produced by MapInfo Ltd).

Methodology

8.3 In developing our methodology we have drawn on established best practice and our extensive experience in this field. For example GVA Grimley LLP prepared the report that will inform the forthcoming DCLG Good Practice Guidance on *Retail/Leisure Need and Impact Assessments*. Although not yet published, this identifies the importance of regional and sub-regional strategies and sets out a number of basic guiding principles, including the need:

- for a transparent methodology;
- to use objective and up to date data inputs;
- to justify the use of growth rates and key assumptions used in the analysis;
- to identify alternative options and objective testing.

8.4 Our overall methodology is based on a widely accepted step-by-step methodology. For example, we have:

- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode areas comprising Harlow survey area;
- Allocated the available expenditure to the convenience and comparison goods shopping destinations (i.e. market shares), on the basis of the household survey of shopping patterns, so as to provide estimates of current sales and future turnover;

- Assessed the cumulative impact of all committed retail schemes on the capacity for new floorspace.

8.5 Our quantitative assessment forecasts the potential residual retail spend and floorspace capacity available for new retailing over five year periods (i.e. 2007 to 2011; 2011 to 2016; and 2016 to 2021) based on PPS6 advice and the Good Practice Guidance. However, we advise that forecasts over more than five years can only provide a broad indication idea of potential growth and need. This is because fluctuations in economic cycles can have a significant impact on consumer spending (such as, for example, rising interest rates).

8.6 These longer term forecasts should therefore be treated with caution and we recommend that, in accordance with best practice, local authorities regularly monitor and update the need assessments to ensure accurate and robust projections with which to make informed development control and policy choices. Please also note that all figures set out in the capacity exercise are cumulative.

Catchment/Study Area Definition

8.7 In order to provide detailed and robust evidence on shopping patterns across Harlow District, we have specifically used the household survey conducted for the Town Centre Strategy, which comprised interviews with 1,000 people. The survey area and zones, and the survey questionnaire were prepared in consultation with Harlow District Council. The study area and zones are illustrated by Plan 1.

8.8 The interviews were distributed proportionately to the population in each Zone. The methodology considered a number of zones, of an appropriate size, to cover the local level and effectively define the catchment areas of centres. This accepted approach is crucial to ensuring a robust evidence base to underpin the Local Development Framework.

Shopping Patterns

8.9 The survey results identified shopping and leisure patterns of households for both convenience and comparison goods. Where necessary, the results were re-weighted by Research and Marketing Limited to remove responses that are not relevant to the capacity assessment (such as ‘internet/mail order shopping’).

8.10 For **convenience goods**, the survey included questions on main food and top-up food shopping. The results of the two types of food expenditure were then merged through the application of a weighting, which reflects the estimated proportion of expenditure accounted for by each type. In this case we have used a weighting of 75%:25% for ‘main’ and ’top-up’ food shopping respectively. This is widely accepted and used in retail studies. However, we consider that the weighting for ‘top-up’ food shopping could increase from its current 25% over the long term, particularly as the ‘top four’ grocery retailers are currently increasing their representation and market share in the convenience goods (‘top-up’) sector. The 75%:25% weighting produces a composite pattern of convenience goods spending, expressed as a market share for each destination centre or foodstore from each survey zone.

8.11 For **comparison goods** the survey comprised six questions on the specific class of comparison goods categories listed below.

- Clothes and shoes;
- Furniture, floor coverings and household textiles;
- DIY and decorating goods;
- Domestic appliances;
- Electronic/entertainment goods; and
- Personal/luxury and recreational goods

8.12 These six categories are based on the definitions used by Experian Business Strategies for comparison goods expenditure. The retail capacity assessment then uses the weighted averages derived from the survey responses for each goods type and applies this to the relevant per capita expenditure by goods type. This process establishes the pattern of spending for residents of each zone on the six specific categories of goods.

Baseline Population and Projections, 2007 - 2021

8.13 The baseline population estimates and forecasts for each of the survey zones have been provided by MapInfo. As stated above, we have used the same data and forecasts as are being tested in the Town Centre Strategy.

8.14 MapInfo data is based on trendline projections and the 2001 Census for small, localised areas. The study area’s 2007 population is estimated to be 432,948 and is projected to increase to 441,476 by 2011, 453,161 by 2016, and 464,275 by 2021. This represents a strong growth of +7.2% between 2007 and 2021 (see Table 1, Appendix 5).

Expenditure Estimates and Projections, 2007 - 2021

8.15 We have used the MapInfo estimates of per capita expenditure for convenience and comparison goods (in 2004 prices) to ensure consistency with the CBRE study. In this case we have applied uniform per capita expenditure figures across the survey area.

8.16 In terms of expenditure growth, we have drawn on projections provided by MapInfo to ensure consistency with the town centre strategy. These projections show that annual spend growth is much stronger for comparison goods than convenience goods retailing. MapInfo's projections indicate an annual growth rate for convenience goods of +0.9% and +4.8% for comparison goods.

8.17 However, it is important to state that these expenditure projections are regularly updated and revised, with resultant impacts on the residual spend and floorspace capacity forecasts. We therefore recommend that the local planning authorities regularly monitor and update the retail capacity forecasts to take account of any significant revisions (either downward or upwards) to the expenditure projections.

8.18 For **convenience goods** the current annual average expenditure across the study area is estimated to be £1,700 per capita. This is projected to increase to £1,762 by 2011 and £1,843 by 2016 (rising to £1,927 by 2021). We have then applied the average per capita expenditure estimates to the survey area population and estimate that the total available convenience goods expenditure is currently £736m (see Table 3, Appendix 5). This is forecast to grow to £778m by 2011 and £835m by 2016 (rising to £895m by 2021). This is equivalent to an overall growth in total available spend of +£158m between 2007 and 2021 (see Table 3, Appendix 5).

8.19 For **comparison goods**, the base year average expenditure is much higher than for convenience goods retailing at £3,596 per capita. This is forecast to grow to £4,338 by 2011 and £5,484 by 2016 (rising to £6,933 by 2021). Table 3 (Appendix 5) shows that the total available comparison goods expenditure within the Harlow survey area is currently £1.6bn, and this is forecast to grow to £3.2bn by 2021. This equates to an overall growth of £1.6bn between 2007 and 2021.

Floorspace Estimates and Commitments

8.20 The comparison goods and convenience goods floorspace estimates used in our assessment have been derived from a number of sources, including the Institute of Grocery Distribution (IGD), Harlow District Council, Experian Goad and our in-house OS-based GIS system.

8.21 Our floorspace assumptions for foodstores include, where appropriate, an adjustment to identify the quantum of convenience and comparison goods floorspace. These estimates were based on information derived from recent Public Inquiries and have been agreed with the Council.

8.22 In terms of convenience and comparison goods floorspace with planning permission, we have identified and agreed the following commitments with the Council.

8.23 For **convenience goods** the only outstanding commitment is for an extension to the out-of-centre Sainsbury's foodstore on Allendale Avenue (see Table 11, Appendix 5). The permission is for a total net additional convenience goods floorspace of 1,506 sq m net. Assuming a company average sales density of £11,814 per sq m net (based on the latest research by Mintel), we estimate this store extension will generate an additional convenience goods turnover of circa £18.2m at 2011. This will therefore need to be deducted from any residual spend forecast for convenience goods retailing over the forecast period.

8.24 For **comparison goods** the only outstanding commitment in the town centre is for the Harvey Centre extension. The figures provided to us by the Council indicate that this extension could provide some 11,567 sq m of net additional comparison goods floorspace (see Table 7, Appendix 6). However, this extension had not been delivered at the time of preparing this report, and we are not clear as to whether it would be developed over a reasonable period of time.

Convenience Goods Capacity Assessment

8.25 In summary, our quantitative assessment indicates that there is a surplus quantum of floorspace in the District at the base year following the planning permission for the Sainsbury's extension. Our projections also indicate that there is no residual spend to support additional new convenience goods floorspace over the forthcoming LDF period, up to 2016.

8.26 The full results of our quantitative need assessment are set out in Table 12 (Appendix 5). The table shows that there is a shortfall in residual expenditure of -£14.2m in 2011 and -£2.7m in 2016. We estimate that it is not until 2021 that there is any residual expenditure (+£9m) available to support new floorspace.

8.27 The lack of quantitative need at the base year is mainly explained by the fact that the new **Asda** store in the **Water Gardens** appears to be significantly under-trading benchmarked against its company average. Based on its composite market share for main and top-up food shopping, as derived from the household telephone survey, we forecast that the store has a current turnover of circa £19m per annum. This is benchmarked against its expected turnover based on company averages of circa £44m per annum. Although Asda has a reasonable market share in its core zone (Zone 1) of 13%, its market penetration in other zones is limited.

8.28 It is not clear why Asda's market shares and sales performance is significantly below its company average, particularly as the **Tesco** store at **Church Langley Neighbourhood Centre** appears to be significantly overtrading. The market shares derived from the household survey produce a total estimated turnover of circa £44m per annum, which is benchmarked against an expected turnover of £26m per annum based on its company average. Tesco's highest market share (34.2%) is in Zone 2, although it does attract trade from the entire survey area with the exception of Zones 6 and 8.

8.29 The other **Neighbourhood Centres** and **Hatches** have more localised catchments and are general trading as top-up food and convenience shopping destinations. They have limited or no share of main food purchases. According to the household survey results, Old Harlow and Bush Fair would appear to be trading well, whereas Staple Tye and The Stow are not achieving significant market shares of available convenience goods spend within Zones 1 and 2.

8.30 The household survey results indicate that the two **out-of-centre foodstores** are trading well. The Tesco store on East Road is trading in line with company averages. The Sainsbury's store on Edinburgh Way is estimated to be overtrading by around £14m above national company averages. Both stores are achieving the highest market share of available convenience goods spend from within Zones 1 and 2.

8.31 In summary, our analysis indicates that the Harlow District is currently well served by a network of foodstores and, with the exception of the new Asda store in the town centre, these stores appear to be trading well. Our assessment indicates that there is sufficient existing and planned convenience goods floorspace to absorb any growth in population and expenditure over the forthcoming LDF period. On the basis of our capacity assessment we therefore conclude that there is no demonstrable quantitative need for additional convenience goods floorspace in the District up to 2016, although we acknowledge that there are potential qualitative 'gaps' in the offer of some of the Neighbourhood Centres.

Comparison Goods Capacity Assessment

8.32 The following sets out our assessment of the market share and non-food turnover performance of Harlow's main centres and out-of-centre retail floorspace at the base year. It also sets out our projections of the residual spend available to support new comparison goods floorspace over the LDF period.

Harlow Town Centre performance

8.33 The survey results indicate that Harlow's market share of comparison goods spend is extensive and, to varying degrees, influences shopping in every zone (see Table 4(b), Appendix 6).

8.34 Plan 7 illustrates the extent of the town centre's market penetration across the defined survey area, highlighting variations in market share. These market shares are a composite of all the main comparison goods categories. Consequently market shares for individual classes of goods will vary across each zone (see Table 4(a), Appendix 6). Plan 7 shows that the centre achieves its highest market shares in its core zones 1 and 2 (i.e. those zones that broadly comprise the Harlow District area) of 53.4% in Zone 1 and 34% in Zone 2 respectively

8.35 The baseline market shares produce a comparison goods turnover for Harlow town centre of approximately £294m. Assuming an existing comparison goods retail floorspace stock for the town centre of 41,609 sq m net, we estimate that Harlow town centre is achieving an average sales density of circa £7,069 per sq m. In our experience we consider that this represents a strong sales density and would appear to indicate that the town centre is trading well.

Retail Warehousing Performance

8.36 According to the survey results Harlow's out-of-centre retail warehousing has an influence across the whole of the survey area (see Table 5(a), Appendix 6). The main retail warehousing in the District compromises the following:

- Harlow Retail Park (9,441 sqm net)
- Queensgate Centre (17,267 sqm net)
- Princess Gate Retail Park (12,267 sqm net)
- The Oaks (10,080 sqm net)
- St James Centre (6,670 sqm net)

8.37 As would be expected given the location of this floorspace (see Plan 3) the survey results indicate that (in total) it is achieving the highest market shares in the core zones 1 (24.6%) and 2 (20.2%).

8.38 We estimate that the District's retail warehousing as a whole currently has a comparison goods turnover of some £172.7m (see Table 5(b), Appendix 6). Based on a total estimated floorspace of approximately 55,726 sq m net, this translates to an average sales density of approximately £3,100 per sqm.

8.39 This sales density is slightly higher than would be expected for these out-of-centre schemes based on their current tenant mix and company averages. We therefore conclude that, on balance, the out-of-centre floorspace is trading well.

'Global' Retail Capacity Assessment

8.40 Our assessment of the residual spend available to support new comparison goods retailing over the forecast period is underpinned by a number of key assumptions, including the following:

- First, we assume an average sales density for new comparison goods retailing of £5,000 per sqm at the base year to reflect the relative scale and quality of its overall retail offer.
- Second, in accordance with PPS6 advice (paragraph 2.34), we have allowed for a +1.5% per annum floorspace 'productivity' (or 'efficiency') growth rate for existing comparison goods floorspace. We consider that this level of growth is reasonable and robust to help maintain and enhance the vitality and viability of existing centres. This productivity growth rate has been derived from MapInfo and was agreed with CBRE. However, we do acknowledge that this growth rate could be higher and/or lower for specific centres, depending on their overall health and performance.
- Third we have assumed that the base year market shares will remain constant over the study period. For the District as a whole and Harlow town centre we therefore assume that market shares will remain unchanged at 30% and 18.9% respectively up to 2021. In reality, however, market shares will increase and/or fall over time depending on the location, scale and quality of new retail development. We discuss the impact of changes in market shares on the capacity outputs in more detail below, specifically with regard to the potential capacity for new comparison goods floorspace in Harlow town centre.
- Finally, for the purpose of our assessment we have not deducted the potential turnover of the planned Harvey Centre extension from the residual spend forecasts in our model as we are not clear as to the current status of this extension.

8.41 Table 8.1 below summarises the 'global' (i.e. District-wide) residual spend and floorspace capacity forecasts derived from our assessment (the more detailed tabulations and results are set out in Appendix 6, Table 8).

Table 8.1: Harlow District: Comparison Goods Floorspace Capacity

	2011	2016	2021
Residual Spend (£000)	76,633	205,735	378,940
Floorspace Capacity (sqm net)[1]	14,440	35,987	61,528

[1] Based on an average sales density of £5,000 per sqm for new floorspace and an allowance for a 1.5% per annum growth in efficiency.

8.42 As the table shows, we forecast that there will be residual spend of £76.6m in 2011, rising to £205.7m by 2016. Assuming an average sales density for new floorspace of £5,000 per sqm in 2006, this is equivalent to a 'theoretical' capacity for 14,440 sq m net of comparison goods floorspace at 2011, increasing to 35,987 sq m net by 2016.

8.43 Table 8.2 below summarises the comparison goods residual spend and floorspace capacity forecasts for Harlow town centre only (the more detailed tabulations and results are set out in Appendix 6, Table 9).

Table 8.2: Harlow Town Centre: Comparison Goods Floorspace Capacity

	2011	2016	2021
Residual Spend (£000)	48,142	129,243	238,003
Floorspace Capacity (sqm net)[1]	9,072	22,607	38,645

[1] Based on an average sales density of £5,000 per sqm for new floorspace and an allowance for a 1.5% per annum growth in efficiency.

8.44 The table shows that there is capacity for circa 9,072 sqm net of comparison goods floorspace in Harlow town centre in 2011, rising to 22,607 sq m net by 2016 and 38,645 sq m net by 2021.

8.45 If the Harvey Centre does proceed as planned, then we estimate that it will provide an estimated 11,576 sqm net of additional retailing. We assume it could achieve a comparison goods turnover of circa £42.4m in 2011 (see Table 7, Appendix 6). As Table 10 in Appendix 6 illustrates, if the Harvey Centre redevelopment were to go ahead (and market shares were to remain constant) there would still be capacity for an additional 1,913 sqm net by 2011 and 15,448 sqm net by 2016.

8.46 However, the commercial reality is that new development in the town centre will increase Harlow's attraction and market share across the study area. The emerging strategy for the town centre and the identified opportunities for new town centre development, particularly in the Northern Quarter, will also help to increase Harlow's overall attraction and market share.

8.47 Based on the reasonable assumption that new development and investment in Harlow town centre will result in a step change in the quality of its shopping environment and retail offer, we have modelled a possible uplift in the town centre's market share from 19% to 22% by 2016. Detailed results are set out in Table 11 to Appendix 6.

8.48 The increase in the town centre's market share across the survey area by just three percentage points up to 2021 would generate an increased capacity for new comparison goods floorspace. Up to 2016 the higher market shares would result in a net additional floorspace capacity of 31,044 sqm net, compared to 15,448 sq m net based on the constant market share scenario. This is forecast to increase to 50,146 sq m net by 2021, compared to the 31, 486 sq m net forecast previously. These floorspace figures are over and above the increase at the Harvey Centre.

8.49 In conclusion, we consider that the town centre has the potential to increase is market share over the forecast period, resulting in an increase in the residual spend available to support new retail floorspace. However, 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 help claw back shoppers and spend to the town.

8.50 In this context we consider 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. Section 4 of this study has highlighted the fact that Harlow currently faces strong competition from a number of significant town centre and out-of-centre shopping facilities across the study area. Therefore, unless Harlow significantly improves its retail offer it is possible that its market share could actually fall. These issues are discussed further in Section 9.

Summary

8.51 Our capacity projections indicate that the total population of the survey area is forecast to rise by 4.7% between 2006 and 2016. Convenience goods expenditure in the survey area is expected to increase from £736m in 2007 to £835m in 2016. Comparison goods expenditure is forecast to increase at a much stronger rate, from £1,556m in 2007 to £2,485 in 2016.

8.52 In terms of convenience provision the stores across the District, stores seem to be trading well, with the exception of Asda which the telephone survey shows to be under trading. Our capacity projections indicate that there is no quantitative capacity for new convenience floorspace until around 2021 where there is residual expenditure to support new floorspace of circa £9.3m.

8.53 Our comparison goods quantitative assessment indicates that Harlow town centre is trading strongly. In terms of comparison goods, our capacity projections suggest that there will be residual spending to support new floorspace across the District of £76.6m by 2011, and rising to £205.7m by 2016. This is equivalent to theoretical capacity for 14,440 sq m net of comparison goods floorspace at 2011, increasing to 35,987 sq m net by 2016. These figures take no account of the Harvey Centre redevelopment.

9. LEISURE AND OFFICE NEEDS ASSESSMENT

9.1 This section describes the existing commercial leisure and office provision within the district, and provides a broad assessment of the qualitative and quantitative need for new leisure and office floorspace over the forecast period.

Methodology

9.2 It is important to state at the outset that, unlike for retail capacity assessments, the methodologies for assessing the quantitative need for new leisure and office floorspace are less developed and robust. For this reason we have used both quantitative and qualitative approaches to assess need across the district, drawing on the extensive research and evidence base.

9.3 Our approach comprises a number of different strands of research, as follows:

- An overview of national trends in the commercial leisure sector provide a better understanding of the relative viability and performance of the different categories (defined by PPS6 as including cinemas, restaurants, bars and pubs, casinos, nightclubs, health and fitness centres, indoor bowling centres and bingo halls). This will provide a better understanding of the potential market interest and key drivers of development at the local level.
- Our detailed qualitative health checks and site visits conducted as an integral part of this study have identified the distribution and quality of existing commercial leisure provision across the district, and identified any potential 'gaps' in provision (also see Plan 4 which illustrates the location of existing commercial leisure facilities across the district).
- The results of the household survey provide a more detailed picture of where people living in the defined survey zones carry out their main daytime and evening leisure activities. The survey also provides a broad indication of the retention and leakage of commercial leisure trips within the District and its main centres, and the quality and attraction of competing leisure facilities across the wider study area.
- A broad brush quantitative assessment of the need for new cinema screens and A3/A4 uses, based on recently developed and accepted methodologies.
- An overview of the forecast overall growth in available leisure expenditure, based on accepted sources and forecasts. This analysis helps to place the potential growth of this sector into context.

Commercial Leisure Needs Assessment

9.4 The key findings of our needs assessment for the main commercial leisure uses are described below.

(i) Cinema Provision & Need Assessment

9.5 According to Dodona Research (2006), the number of new cinema screen openings has slowed significantly over recent years, following a period of dramatic growth during the 1990's. During this period there was a significant increase in new multiplex cinema developments, primarily in out-of-centre locations, either as stand-alone schemes or as anchors to leisure parks.

9.6 The slowdown in development is partly explained by the Government's town centres first policy, which has effectively curbed new multiplex cinema and commercial leisure developments in out-of-centre locations. Although there has been a resultant increase in investment in smaller cinemas in town centre locations, multiplexes have maintained and increased their share of cinema screens to 73% (i.e. the number of cinemas has decreased but the number of screens has increased). Research indicates that there are now approximately 200 single screen cinemas in the UK and only 16% of all screens in cinemas with less than four auditoria.

9.7 According to Dodona, the number of multiplex cinemas (and screens) opened in 2005 was the lowest since 1987. The latest research indicates an increase in openings in 2006, with eight new multiplexes planned comprising 64 screens. Although Dodona forecast an increase in new investment and development over the short term, the growth will continue to be modest compared with previous trends due to the increase in sophisticated home entertainment systems, digital television and other technological advances.

9.8 The household survey identified that 48.9% of people in the survey area visit a cinema. The highest visits were from residents in Zones 4, 8 and 9 (56%), with Zone 7 have the lowest visits (39%). Clearly, the patterns of cinema visits vary across the survey area.

9.9 Table 9.1 below illustrates the market shares of the main cinemas in the study area. The table shows that the only cinema in Harlow District - Cineworld at the out-of-centre Queensgate centre - is the most popular cinema, achieving a market share of 48.8%. There was a three screen Odeon in Harlow town centre, but this has closed down.

Table 9.1: Dominant Cinema Destinations Across the Survey Area

Cinema	No. of Screens	Market Share (%)
Cineworld, Queensgate Centre, Harlow	6	48.8
Cineworld, Enfield	15	10.6
Cineworld, Bishops Stortford	6	10.0

Source: Household Telephone Survey 2006

9.10 Across the UK there are approximately 3,400 cinema screens which equates to around 17,429 people per screen. At present in the Harlow survey area we estimate that there are some 47,778 people per screen. This would seem to suggest that there is a potential under-provision of cinema screens across the survey area. If the provision in the area was in line with national averages we estimate that it would require a further 16 screens.

9.11 Although it seems unlikely that Harlow could support this many additional screens, we conclude that there is a clear qualitative and quantitative need for improved cinema provision in the district and in Harlow town centre in particular. Therefore, provided that market demand exists, we advise that a multiplex cinema should be promoted within the town centre as part of a comprehensive mixed use development.

(ii) Bingo

9.12 As Plan 4 illustrates, Harlow has one Bingo Hall (Mecca Bingo) which is located in Harlow town centre. Research undertaken by Mintel (2005) states that bingo has shown modest growth since 2000, despite a declining customer base. Deregulation has been the main source of growth, with bingo clubs having been allowed to offer bigger prizes and to install more gaming machines offering a larger jackpot payout.

9.13 However, more recent research by Mintel (2007) indicates that bingo continues to suffer from its downmarket image, which limits its appeal as a night out for the majority of consumers. Research suggests that the industry will experience a downturn in turnover in 2007. This is not necessarily as a result of the Gambling Act, but is primarily explained by the ban on smoking inside clubs, which will be UK-wide by summer 2007. The sector will also be vulnerable to impact from the increased take-up of bingo and gambling on the Internet.

(iii) Ten-Pin Bowling

9.14 As Plan 4 illustrates, Harlow has one bowling alley (First Bowl) which is in Harlow town centre opposite Mecca Bingo. 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 1980's, decline set in during the early 1990's. Since then, however, a spate of investment in new centres and refurbishments by recognised chain brands has revitalised the industry to a degree.

9.15 Mintel research (2006) has identified an increase in development of high-end quality venues in central locations. However, long term attraction and viability and of this sector of the commercial leisure market will depend on increasing its appeal to a wider demographic and providing a more sophisticated eating/drinking offer.

9.16 There are more recent signs that the concept is already beginning to evolve to generate increased customer interest and visits. For example, the *Bloomsbury Bowl Lanes* in London offers a very popular 1950's 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. This more integrated leisure/entertainment experience could represent the way forward for this sector of the market.

(iv) Health & Fitness Clubs/ Swimming Pools

9.17 According to Mintel's research report on UK Health and Fitness Clubs, the value of this sector increased by 62% between 1998 and 2002 (at current prices). In real terms the growth was a substantial at 49%. The growth of this sector has been driven by a number of factors, including significant changes in lifestyles and resultant shift away from competitive sports towards those focused on personal health and fitness development.

9.18 The expansion of this sector has continued in recent years, although growth has been characterised by significant consolidation in the industry. For example, Virgin Active has recently taken control of the Holmes Place leisure clubs. The industry is forecast to remain strong throughout this decade and beyond as personal health and fitness awareness continues to develop.

9.19 Our assessment of the use of health and fitness clubs across Harlow has been based on the results of the household survey. The survey indicates that some 25% of all respondents use health and fitness clubs at present. Of those, the most popular destinations include:

- Harlow Sports Centre (6.7%);
- Harlow town centre's Esporta Club (4.7%); and
- Harlow's community pool (1.6%).

9.20 The survey results indicate that gyms/ health & fitness clubs have a much more localised catchment than some of the other leisure facilities, such as cinemas and restaurants. An assessment of current requirements from health & fitness operators, as derived from the Retail Focus Reports, indicates that no operators currently have requirements.

9.21 In terms of planning for further facilities, health & fitness clubs should be directed to town centres first, as part of more comprehensive mixed use retail/residential schemes. We do not consider that it is helpful to assess the quantitative need for new health & fitness clubs, as this will be largely determined by market demand and the availability of suitable and viable sites.

(v) The Evening Economy

9.22 According to the household survey some 46.8% of respondents visit pubs and clubs. Of those, 7.2% visit Harlow town centre most often. The two centres with the highest market share from the survey area are Epping (10.4%) and Bishops Stortford (7.6%).

9.23 The household survey identified that 76.2% of respondents visit restaurants. Harlow has the highest market share (9.6%) of the restaurant sector. Other popular centres are Epping (8.7%) and Bishops Stortford (7.2%).

9.24 It is apparent from the healthcheck that Harlow has a limited provision and range of quality eating and drinking establishments. We consider that it is important that Harlow enhances its provision of pubs and restaurants to maintain a healthy evening economy.

9.25 It is also important that the neighbourhood centres and hatches retain, and where feasible enhance, their provision to meet the needs of the local community. In many of the neighbourhood centres and hatches the pub provides an important anchor for the centre, and it is important that these are retained or replaced as part of any wider proposed development.

(vi) Leisure Expenditure Projections

9.26 The following summarises the overall growth in available leisure expenditure to demonstrate the extent of growth rates in this sector. We have drawn on the Experian *E-marketer Report* which provides annual consumer leisure expenditure per person on leisure and recreation goods and services (in 2005 prices). Leisure expenditure (as defined by Experian) includes recreation and sporting services, cultural services, games of chance (gambling) and restaurants/ cafés. We have then generated average spend per capita and total available spend on leisure and recreation goods and services based upon the demographic profile of Harlow District Council.

9.27 We have taken the base position and projected available expenditure per capita leading up to 2016 assuming a long term growth rate in available expenditure of 1.4% per annum for leisure goods. This growth rate figure is from Experian Business Strategies Retail Planner Briefing Note 4.0, October 2006.

Table 9.2: Harlow District Council - Average Leisure Goods Expenditure (£ per capita)

(2005 PRICES)	2006 (£)	2011 (£)	2016 (£)
Total Leisure	1,642	1,813	2,002
Restaurants/ Cafes	971	1,072	1,184
Recreational and Sporting services	107	118	130

Source: Experian Business Solutions, E-Marketer 2007

9.28 Table 9.3 below applies this average per capita spend to the baseline population and projections for Harlow District. It shows that there will be an additional circa £40m available leisure expenditure in the local authority area in 2016, which represents a significant +30% growth. Much of this growth will be directed towards Harlow town centre, as this is where the majority of the market demand (and new development) will be focused. However, for the reasons described above, it is important that neighbourhood centres and hatches also benefit from this growth to help maintain their overall vitality and viability, and mix of uses and attractions.

Table 9.3: Total Leisure Expenditure

	2006 (£000)	2011 (£000)	2016 (£000)
Total Leisure	135,747	150,105	166,330
Restaurants/ Café s	80,275	88,765	98,359
Recreational and Sporting services	8,846	9,782	10,839

Source: Experian Business Strategies, Emarketer, 2007

9.29 Our assessment highlights sufficient growth in the District to sustain a circa 23% growth in the restaurant/café sector by 2016. This strong growth will primarily be directed towards town centres first, in accordance with planning policy at the national, regional and local level. Research indicates that mixed use town centre schemes can comprise a significant quantum of A3/A4 floorspace to complement the wider retail, office and residential offer.

9.30 For the purpose of our need assessment we have assumed that A3/A4 uses will comprise, on average, circa 15% of floorspace in mixed use schemes. We have therefore assumed that any identified capacity for comparison goods floorspace in the District could support circa 15% of A3/A4 floorspace. Table 9.4 summarises the potential quantitative need for new café, restaurant and bar floorspace in Harlow town centre up to 2021 based on the capacity forecasts set out in Section 8, assuming both constant and increased market shares.

Table 9.4: Harlow Town Centre - Projected Quantitative Need for New A3/A4 Floorspace (net sq metres)

(NET SQUARE METRES)	2011	2016	2021
CONSTANT MARKET SHARES:			
Comparison Goods Floorspace Capacity:	6,494	13,884	22,290
Estimated A3/A4 Floorspace Capacity (@15%)	974	2,082	3,343
INCREASED MARKET SHARES:			
Comparison Goods Floorspace Capacity:	**20,820**	**30,524**	**41,688**
Estimated A3/A4 Floorspace Capacity (@15%)	3,123	4,579	6,253

Source: GVA Grimley Retail Capacity Forecasts

9.31 Whilst this is a relatively crude assumption, and need will clearly be determined by the level of market interest and demand, it does provides an indication of the potential quantum of A3/A4 floorspace which would be developed in the town centre as part of any potential mixed use scheme.

9.32 The type of A3/A4 offer will also be determined by the town centre's customer profile and the demographic profile of the catchment population. For example, the potential for mixed use development in Harlow to attract a significant proportion of ABs (professional/managerial socio-economic groups) to the town centre, will determine the scale and quality of future restaurant and café provision.

9.33 An assessment of current requirements from A3/A4 operators, as derived from the Retail Focus Reports, indicates that Pret a Manger, Ask, Pizza Express and Wagamamas all have stated requirements for Harlow District and the town centre. In terms of the broad floorspace requirements, this adds up to 2,068 – 4,385 sqm gross of current market demand.

9.34 As stated previously for retailer requirements, the scale and quality of current requirements should be treated with caution. Experience shows that proposals for new quality mixed use development in town centres and elsewhere will inevitably generate increase demand.

Office Needs Assessment

9.35 There is limited available published data on the Harlow office market. This is due to Harlow having a relatively small scale office market and a limited supply of good quality space. The Harlow Business Park provides some modern office space, together with the area by the Railway Station

9.36 Our in-house database (*Streets Ahead*) shows current office supply of approx 66,000 sq ft in a variety of buildings. In addition, there is the refurbishment of Burnt Mill on Edinburgh Way which will provide approximately 17,500 sq ft, and 20,000 sq ft of new build units.

9.37 Office rents currently range between £10 and £13 per square foot. This is lower than for Brentwood (£20/sq.ft.) and Chelmsford (£17/sq.ft). Recent significant lettings have been focussed on the buildings by the station. For example, Field House is a good quality refurbished building and Close Bros took 11,971 sq ft in October 2006 at a reported £12.30/sq.ft. Additional office floorspace by the station came on to the market in February 2007, including Goodman House (39,452 sq ft), at a reported £13/sq.ft..

9.38 Harlow is also set to benefit from £6.5bn infrastructure investment into its quadrant of the M25, as part of the Olympic Games regeneration. There is therefore potential for Harlow's office market to grow over the forecast period. We recommend that any market demand for significant new office space in the District should be directed towards to town centre first in line with PPS6 and the sequential approach.

Summary

9.39 Our assessment of the commercial leisure sector in the District indicates a reasonable range of commercial leisure facilities including a cinema, bingo, ten-pin bowling, bars, restaurants, and health and fitness clubs. It is apparent that much of this provision is based around Harlow town centre.

9.40 In terms of cinemas, the provision is confined to the out-of-centre Cineworld at the Queensgate Centre. The number of screens in the District is below what would be expected, given the size of the population. We therefore consider that there is a qualitative and quantitative need for a further cinema, which in accordance with PPS6, should be directed towards the town centre.

9.41 There is projected to be around a 30% growth in available leisure expenditure within the district by 2016. Given best practice towards vital and viable town centres, the growing trend towards mixed use town centre schemes, and the strong growth in expenditure in this sector, we advise that town centre comparison goods retail schemes should comprise circa 15% of leisure floorspace. It is also important that neighbourhood centres and hatches benefit from this growth. Furthermore, the pubs in most of the neighbourhood centres and hatches are important attractors and anchors, as part of the wider overall vitality and viability of these centres.

9.42 Harlow has a limited office market, although there are some modern facilities at Harlow Business Park and the area around the station. We recommend that any emerging demand for significant new office space in the district should be directed towards the town centre first in line with PPS6.

10. OPPORTUNITIES FOR NEW DEVELOPMENT

10.1 This section sets out our description and a high level assessment of the potential for new development and/or redevelopment opportunities in the Town Centre and the Neighbourhood Centres to accommodate the identified need for new comparison, convenience, commercial leisure and other town centre uses. The identification of development opportunity sites has been based on detailed discussions with the Council.

10.2 Please note that we have not carried out a detailed assessment for Harlow town centre, as new development in the town is currently being progressed by the newly formed Harlow Renaissance Partnership. This area of work is also considered in more detail by the Town Centre Strategy being prepared by David Locke Associates and CBRE.

10.3 The sequential test requires that in selecting sites, all options in existing centres be thoroughly assessed before less central sites are considered. The sequential approach requires that locations are considered in the following order:

- First, locations in appropriate existing centres where suitable sites or buildings for conversions are, or are likely to become, available within the development plan document period, taking account of an appropriate scale development in relation to the role and function of the centre; and then
- Edge-of-centre locations, with preference given to sites that are or will be well connected to the centre; and then
- Out-of-centre sites, with preference given to sites which are or will be well served by choice of means of transport and which are close to the centre and have a high likelihood of forming links with the centre.

10.4 Where it is argued that otherwise sequentially preferable sites are not appropriate for particular development proposed, policy requires applicants to demonstrate why such sites are not practical alternatives in terms of:

- **Availability:** the sites are unavailable now and are unlikely to become available within a reasonable period of time;
- **Suitability:** with due regard to the requirements to demonstrate flexibility, the sites are not suitable for the type of development proposed; and
- **Viability:** the development will not be viable on these sites.

10.5 The following sets out our assessment of the suitability, viability and availability of various sequential sites identified in partnership with the Council's planning and estates teams.

Harlow Town Centre

10.6 There are significant opportunities highlighted in the adopted Local Plan for the regeneration and development of Harlow Town Centre. The three broad sub areas identified are Town Centre South (TCS), Town Centre Central (TCC) and Town Centre North (TCN), as highlighted on Plan 9.

10.7 We have not carried out a detailed assessment of the identified opportunity sites, as the Town Centre Strategy currently being prepared for the Council and EP will address the development and regeneration potential of the town centre in full. We also understand that various planning and development briefs will result from the Town Centre Strategy to provide a more detailed, but flexible, framework for future development and investment.

(i) Town Centre South (TCS)

10.8 The second phase of The Water Gardens opened towards the end of 2004 and it represents the most recent development in Harlow town centre. It comprises 12,077 sqm of retail floorspace, anchored by Asda (which opened in 2003) and a range of different sized retail units along a purpose-built pedestrianised street that connects to the existing shopping area via Broadwalk. Key retailers include TK Maxx, Matalan, Woolworths, Sports World, Peacocks, Next, HMV, River Island and Top Shop, along with the new Council offices, an Esporta health club and four restaurant and café outlets.

10.9 We consider that there are limited opportunities in the short term for the introduction of significant new retail, commercial leisure and office floorspace in this area. However, over the longer term, there could be potential to redevelop parts of The Water Gardens to introduce more residential and office floorspace above shops.

10.10 The 0.7Ha Magistrates Court site in this area represents a potential short/medium term opportunity for new development, as identified by Policy RTCS9. It is located adjacent to Asda and is no longer sufficient to meet current needs. The Council would prefer the existing site to be redeveloped and the relocation of the magistrate's court to an alternative town centre site. The Council propose that the site be redeveloped for office uses, with the opportunity to build a landmark building on a key entrance to the town centre.

(ii) Town Centre Central (TCC)

10.11 TCC represents a substantial area of the town centre. It comprises the two primary shopping areas - The Harvey Centre and Broadwalk - along with Little Walk, Terminus Street, Westgate, part of Westgate Square and Playhouse Square.

10.12 The local plan identifies that TCC is a key strategic area for improving the overall quality and variety of the town centre's retail offer and environment, as well as improving transport connections and accessibility. The Council has identified existing facilities that should be retained in TCC as part of any redevelopment, as they are regarded as contributing to the range of offer, or acting as important anchors and catalysts. Examples include the Playhouse, library, church, major retailers (such as M&S, BhS, Boots and WH Smith), major leisure operators (namely First Bowl and the Bingo Hall) and other key uses and operators.

10.13 The retail offer in this area is dominated by the 33,444 sqm Harvey Centre, owned by Sapphire Retail Fund Ltd. As mentioned in Section 5, the shopping centre currently has an outstanding permission for a 22,249 sqm extension. The development will result in net additional floorspace of c.11,576 sqm and represents a significant sequential opportunity in the town centre that is currently available.

10.14 The extension will involve the demolition of sections of the existing centre and improvements to the environment of Broad Walk and Little Walk. The current plans for the scheme is to be anchored by a major store (10,543 sqm) and 22 additional retail units, served by three levels of parking and servicing. The majority of this new extended floorspace will be for comparison goods and specifically fashion retailing, although clearly there will need to be some flexibility in the letting strategy to reflect market demand.

Broadwalk / Playhouse Square

10.15 Broadwalk is a linear street running along the edge of the Harvey Centre and is the main route linking the Harvey Centre with the Water Gardens and TCN area. The environment in this area is relatively poor and it fails to attract many of the higher order key national multiple retailers. Nevertheless, retailers that are represented include Bon Marche, The Body Shop, Monsoon, Ethel Austin and Holland and Barrett.

10.16 This c.1.0Ha Playhouse Square site is identified by Policy **RTCS8** of the Council's Second Deposit Draft as having the potential for redevelopment. Development of this site would require relocation of the Playhouse and church. The Playhouse would need to be relocated to larger premises, providing a greater range of facilities, in TCN. It is likely that relocation of existing uses could make redevelopment of the site commercially unviable, unless the Council was to take the lead in delivering the site through CPO and land assembly.

(iii) Town Centre North (TCN)

10.17 The Second Deposit Draft identifies TCN as being a substantial and strategic part of the town centre. However, many of the retail fascias are not well maintained and this has resulted in a poor environment. TCN has the highest proportion of vacancies in the town centre. Many of the current vacancies are clustered around Westgate, which is where the Harvey Centre is to be expanded.

10.18 Policy **RTCS5** specifically promotes the redevelopment of TCN for a range of town centre uses, including hotel, entertainment, leisure, food, drink, office and residential uses. It is also identified as providing an alternative location for the Playhouse, if required. The following sites/areas have been identified for redevelopment:

Land South of Fourth Avenue and north of Kitson Way/Post Office Road

10.19 This c.3Ha site is identified by Policy RTCS6/1. It wraps around the town centre to the north and currently comprises surface-level car parks and a petrol filling station. The Council's aspirations for the site focus on providing an improved visual identity for the northern boundary of the town centre in order to encourage people to enter the town centre.

10.20 This site would make a valuable addition to the range and quality of facilities in the town centre and would act as a catalyst for other operators. The Council has also identified the potential for a landmark building at the corner of Fourth Avenue and Velizy Avenue. They state in the adopted local plan that this would be the preferred location for a hotel and conference centre, although clearly this would depend on market interest in this and other locations across the town centre as a whole.

Post Office and Adams House East

10.21 This c.0.8Ha site is identified by Policy RTCS6/2. The site currently comprises the main post office sorting depot for Harlow. The Council state that the post office would need to be incorporated into a redevelopment scheme, or relocated to an appropriate town centre site. In our experience the Sorting Office is a use that does not necessarily need a town centre location and could be relocated to an edge-of-centre or alternative location, thereby freeing up the site for a larger, more comprehensive development.

10.22 Adams House is in a secondary shopping area and is a poor quality retail location. Its tenants at ground floor level currently comprise twenty retail units, including a Yates wine bar. The Council has identified that this operator makes an important contribution to the town's evening economy and should be retained as part of any redevelopment. Planning permission has recently been granted for the redevelopment of Adams House to provide new residential units above the existing ground floor uses.

Stone Cross and Northgate

10.23 This c.1.2Ha site is identified by Policy RTCS6/3. It comprises Stone Cross, which has been the location for the town's street market for some 50 years and is designated as Secondary Shopping Frontage. The Council has identified the market as a key town centre use that should be either incorporated into any future redevelopment of the area (although possibly at reduced capacity), or relocated to another appropriate town centre site (such as TCC). The 'public square' is surrounded on three sides by buildings with ground floor town centre uses and mainly residential above. The environment in this part of the town centre is poor and investment is required.

Neighbourhood Centres

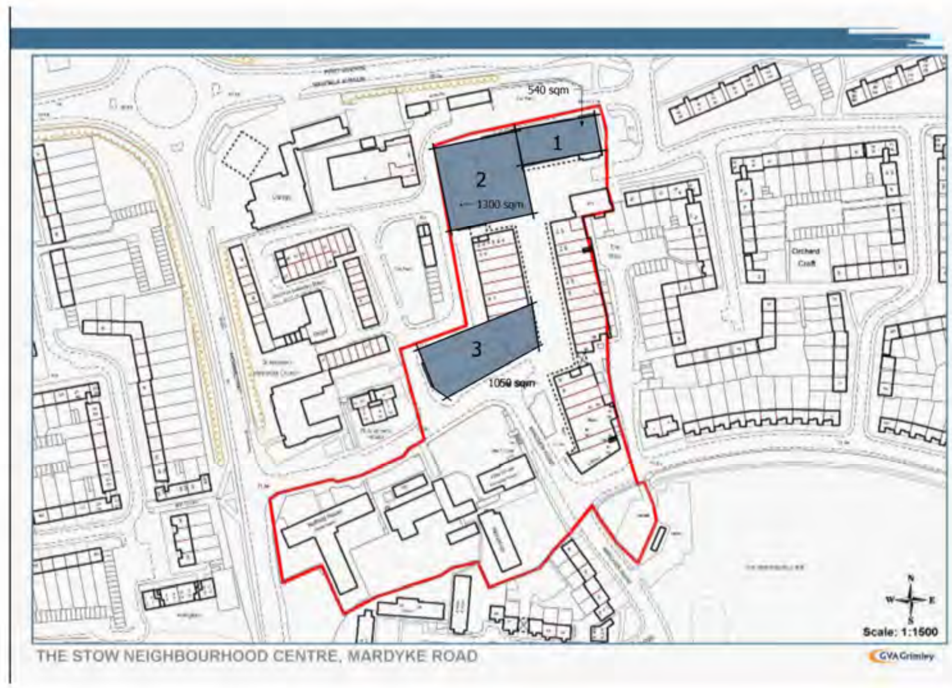
10.24 Both The Stow and Bush Fair have been identified as being dated and having poor quality environments. In our judgement there could potentially be opportunities for the partial redevelopment of both centres, particularly as the Council owns the freehold of both centres and is in a strong position to help to deliver new investment and development.

10.25 In the case of The Stow there could be potential opportunities for partial redevelopment to provide more modern retail floorspace, with residential uses above ground floor level. This would help to strengthen the centre's offer, with frontages facing on to the precinct helping to generate stronger footfall and spend in the centre itself.

10.26 The Council has significant ownership of The Stow, which includes the shops, offices and flats above and the walkways between the shops. However, any redevelopment proposal would require negotiations with existing leaseholders (of which some have long tenancies), to agree surrender of their leases, relocation and/or compensation. The flats are predominantly occupied by Council tenants and the Council retains the freehold of the buildings.

10.27 Plan 10.1 below illustrates some of the potential options that could be available to the Council to redevelop parts of the centre to help provide more modern ground floor commercial uses, along with residential uses above. Clearly these are only options and more detailed financial appraisals will be needed. The Council will also need to consider the need to use its Compulsory Purchase Order powers to deliver development in the centre.

Plan 10.1: Potential Options for Partial or Comprehensive Redevelopment of The Stow



10.28 In Bush Fair we have identified a significant opportunity on the corner of Tilegate Road/ Tawneys Road, on the site currently occupied by the Evangelical Lutherian Church and Poplar Kitten Public House (see Plan 10.2). In our judgement neither building currently makes a positive contribution to the neighbourhood centre's environment on this important gateway site.

10.29 The Public House and surface car park fronting Tawneys Road are owned by the Council. The site currently occupied by the church and pub could potentially accommodate a development comprising 1,750 sqm gross. However more detailed appraisals and discussions are required to consider the potential relocation of the church to an alternative site in the District and to replace the pub in the neighbourhood centre. As for The Stow, the Council may also have to consider the need to carry out CPO to help deliver the site for redevelopment.

Plan 10.2: Potential Options for Partial or Comprehensive Redevelopment of Bush Fair

10.30 Old Harlow has been identified as being a priority for regeneration by the 2006 Harlow Area Investment and Renewal Framework. This formed the basis for a successful application by the Council for ODPM Growth Area Funding to transform Old Harlow into a vibrant and attractive centre, with a mix of high quality shops, restaurants and town houses.

10.31 The project will initiate a series of property-led interventions that will help to facilitate the regeneration and redevelopment of key opportunity sites. The estimated end date for the project is March 2008. Amongst the project objectives are the strengthening of the retail offer and increasing housing provision. The Growth Area funding is essential to attract private sector investment and other public sector funding to help unlock the potential for future developments.

10.32 We understand that a Development Brief will be commissioned to help identify potential development sites in the centre, a number of which could represent an opportunity for new retailing. One site that could be suitable and viable for a store format similar to the application would arise from the potential relocation of the Health Centre on Garden Terrace Road. Although this site is not currently available, the commitment from the Council in terms of its objectives for Old Harlow and the possible use of its CPO powers, indicates to me that there could be a significant opportunity to deliver new mixed use/retail development on this site.

Summary

10.33 In summary the Council has identified significant potential development opportunity sites identified in the Town Centre. We understand that the recently formed Harlow Renaissance Partnership will help to deliver these opportunities in a number of ways, using the Town Centre Strategy as a framework to inform and guide change over the short, medium and long term. This will include the selection of a development partner or partners for specific areas and sites. It is clear that the identified need and forecast capacity for new retail, leisure, office and other town centre uses identified in our study should and could be located in the town centre first, in accordance with the sequential approach.

10.34 With regard to The Stow and Bush Fair Neighbourhood Centres, we consider that the Council is in a strong position to help promote and deliver new development in these centres as it owns their freehold. Although more detail financial appraisals and market testing would be needed to understand the viability and demand for new development, we believe that there is significant potential over the next five year period to deliver significant change in these centres to help maintain and enhance their overall vitality and viability.

10.35 The Council should specifically consider the interest from supermarket operators to anchor the retail offer of these shopping precincts through redevelopment, as this would help to strengthen their overall role and function. In terms of delivery, the preferred ‘model’ would be to form a partnership with a supermarket operator, if there is sufficient interest. However, the first step in securing market interest could require the preparation of Area Action Plans (AAP) or development briefs for the Neighbourhood Centres, which would then be embedded in policy as Supplementary Planning Documents (SPDs).

11. KEY FINDINGS AND RECOMMENDATIONS

11.1 This section draws together the main strands of our research and sets out our recommendations for developing robust and realistic retail planning and town centre policies for Harlow District's main centres.

Planning Policy Context

11.2 Government guidance makes clear that sustainable development is the core principle underpinning planning. Accordingly PPS1 sets out a range of overarching policies aimed at facilitating sustainable patterns of urban and rural development through a number of initiatives, including the need to ensure that new developments provide good access to jobs and key services for all members of the community.

11.3 PPS6 reaffirms the Government's commitment to maintaining and enhancing town centres. Accordingly the central objective of the guidance is to promote the vitality and viability of town centres by planning for the growth of existing centres and enhancing existing centres by promoting them as the focus for new development. Where growth cannot be accommodated in identified existing centres, local planning authorities should plan for an extension to the primary shopping area. It makes clear that where reversing the decline in centres is not possible, local authorities should consider reclassifying such centres within the retail hierarchy.

11.4 In allocating sites and assessing proposed development, PPS6 requires local planning authorities to assess the need for the development; identify the appropriate scale; apply the sequential approach; assess the impact on existing centres; and ensure locations are accessible and well served by a choice of means of transport. Local planning authorities after considering these factors, should assess the degree to which other considerations such as physical regeneration, employment, economic growth and social inclusion are relevant.

11.5 Regional Planning Policy recognises that there is a need for significant additional housing in Harlow, and that growth is required to support regeneration priorities for the town. Harlow is identified as a Regional Centre and a key location for new development and growth in the East of England Plan.

11.6 At the local level, clear objectives are set out to regenerate Harlow town centre and its retail offer to promote a diversity of town centre uses and to improve the physical environment. Following the development of The Water Gardens at Town Centre South, the Council is progressing plans to redevelop the north of the town centre through the Town Centre Strategy. The adopted Local Plan encourages entertainment, leisure, food, drink and residential uses in this area. In addition to the need to improve the retail and leisure offer, the Local Plan notes that there is a need to promote environmental improvements in the town centre including physical linkages, pedestrian movement, trees and landscaping, public squares and servicing arrangements.

11.7 The Local Plan also seeks to strengthen and maintain the role of Harlow's Neighbourhood Centres and Hatches by improving the range and quality of facilities and retaining key facilities. In particular, the plan supports the improvement of The Stow and Bush Fair Neighbourhood Centres and acknowledges that there is potential to redevelop some of the Hatches for mixed-use, retail, business and residential uses.

Retail Trends

11.8 National retail trends indicate a continued growth in incomes and expenditure, albeit not at such strong levels as in the last 15-20 years. The growth in expenditure is focused on comparison goods, with virtually no increase in convenience goods expenditure.

11.9 One of the key drivers of retail development over the last 25 years has been increased car ownership, which has resulted in greater household mobility. As a result the consumer has more choices of places to visit, rather than being constrained to their 'local' centres, and the average distances travelled for shopping and other activities is generally much greater.

11.10 One of the potential drivers of change over the next 5-10 years could be the take-up and growth of Internet shopping by more households. The recent strong growth looks set to continue, albeit from a very small percentage of overall retail spending, and the impact on certain retail sectors could continue (such as, for example, books, records, travel agents, electrical goods, etc.). However, we consider that the stronger town centres, which provide a wider variety of uses and activities in a pleasant environment and have good accessibility by all modes of travel, will prosper over the longer term.

11.11 As described above, retail planning policy has become much more focused on promoting and protecting town centres first. New forms of retailing, such as purpose-built out-of-centre regional shopping centres, factory outlet centres and retail warehouse parks have represented a significant proportion of new floorspace development since the 1980s. However these types of out-of-centre development are now largely restricted by planning policy and this has led to a significant shift back to new town centre retail development over the last five years or more.

11.12 The foodstore operators have also been forced to evolve their formats and offer in the context of the revised planning system. With restrictions on out-of-centre stores growing, and changing socio-economic trends, several large operators have returned to the high street and are developing smaller convenience store formats (such as, for example, Tesco Metro and

Sainsbury's Local). The major foodstore operators are also extending the comparison goods offer in their new and existing stores (through applications for extensions and/or mezzanines) in order to benefit from the stronger growth in non-food spend. Many of the larger foodstores have evolved into mini variety or department stores, which potentially poses a greater threat to smaller centres, where the large out-of-centre stores become one-stop shopping destinations negating trips to the town centres.

11.13 Other key trends over the last decade or more have included the increased requirements for larger store formats from high street retailers. This demand has resulted in significant new retail and mixed use development in Britain's larger 'top 50-70' centres. In turn, this has placed increasing competitive pressures on smaller and medium-sized centres that lie within the catchment areas of these larger shopping centres. Where smaller centres have been unable to diversify their offer or create niche markets they have generally suffered. This explains the reason behind the Government's commitment to promote new development and investment in Britain's smaller and medium-sized centres as part of the sustainable communities agenda.

11.14 These trends present significant challenges for the District's main centres. We describe the opportunities and potential responses to these challenges in more detail below.

Sub-Regional Context

11.15 Our assessment has shown that many of the competing centres surrounding Harlow are set to expand and improve their retail offer further over the next decade. For example, Cambridge's significant increase in its retail offer is likely to mean than it will draw a higher proportion of spend from the survey area. The cumulative impact of these schemes is likely lead to an increased leakage of spend out of Harlow District and its wider catchment area unless it is able to enhance its retail offer to counteract this.

11.16 Our review of national retail trends identifies the significant polarisation of retail activity which has taken place over the last twenty years. A relatively small number of large dominant regional and sub-regional centres are taking a growing proportion of total spend. In this context, Harlow will need to continue to improve and diversify its retail and town centre offer to ensure it maintains and strengthens its position as a regional shopping centre, as identified by the East of England plan.

Harlow Town Centre

11.17 Our qualitative assessment of Harlow town centre in Section 5 identified that the town centre is divided into three distinct areas - The Water Gardens, Town Centre Central and Town Centre North. Each of these areas has a distinct offer and characteristics and comprises a variety of uses and activities.

11.18 Our analysis of the town centre indicates that Harlow is relatively healthy and performing well benchmarked against a number of health check indicators. For example:

- It has an above average representation of comparison goods and multiple retailers benchmarked against the national averages;
- Its offer has been enhanced by the opening of The Water Gardens;
- The town benefits from good transport links, although the railway station is located some distance from the town centre; and
- The majority of the town centre is pedestrianised;

11.19 However, there are some fundamental weaknesses and 'gaps' in its retail and commercial leisure offer which we consider need to be addressed as part of the LDF process if the town centre is to continue to fulfil its sub-regional role and compete with surrounding centres. For example, we found that the town centre has:

- below average provision of convenience and service units benchmarked against the national average;
- a weak department store offer;
- below average provision of higher-order quality fashion retailers benchmarked against competing centres in the region;
- a limited eating out and drinking offer, which has also resulted in a poor evening economy;
- a relatively poor choice of other commercial leisure uses.
- a high vacancy rate of 17% benchmarked against the national average of 10%. (This highlights potential signs of vulnerability, although a significant proportion of the vacant units are around Westgate where the planned Harvey Centre extension would occur);
- lower Prime Zone A rental levels that other competing centres in the region and sub-region, with the exception of Bishops Stortford and Brentwood;

- falling retailer requirements for representation in the town centre following the recent development of The Water Gardens;
- stronger current interest from mid-market value-orientated comparison retailers for representation in the centre, rather than from high end fashion retailers;
- poor linkages and permeability between the three different shopping areas; and
- a popular, albeit poor quality street market, which operates five days a week.

11.20 Harlow town centre's environmental quality and built form varies across the three distinct shopping areas. For example, The Water Gardens provides a contemporary town centre environment characterised by high quality street furniture, paving, materials and planting. The cafés and restaurants also have outdoor seating areas, albeit with an unattractive view over the car park. Significantly, the changes in footfall indicate that The Water Gardens has shifted the town centre's retail gravity to the south, which we consider has exacerbated the decline of the northern part of the town centre.

11.21 The rest of the town centre is inward-facing and is generally characterised by blank facades, poor gateways and buildings, perimeter car parks and unattractive service areas. We consider that there is considerable potential to enhance the character of the town centre, to improve the pedestrian environment and to strengthen linkages across the centre to ensure that the different areas of the town centre join seamlessly. These issues have been considered in more detail by the Town Centre Strategy recently prepared by David Lock Associates.

11.22 New investment and development is also need in the town centre to meet the identified qualitative and quantitative need for new comparison goods retail floorspace and commercial leisure uses. An increase in the quantum and quality of the town centre's retail and leisure offer, along with other town centre uses, will help the town centre 'claw back' a proportion of the shoppers and spend currently leaking out of the District to other competing centres and shopping locations.

11.23 In this context there is still an outstanding planning permission for an extension to the Harvey Centre which has not been implemented, which could accommodate a new department store or larger anchor stores. In addition, Harlow District Council and the Renaissance Partnership are promoting new investment and development opportunities across the town centre to help extend and strengthen Harlow's retail offer. For example, the Council and Renaissance Partnership are currently in the process of short-listing a development partner to help deliver the regeneration of Town Centre North through new mixed use development. New development in this area could comprise new modern retail floorspace, along with a mix of possible entertainment, leisure, food, drink and residential uses to help strengthen the town's evening economy.

Neighbourhood Centres

11.24 The Neighbourhood Centres are an important part of Harlow District's retail hierarchy and provide a range of retail, service and community uses. They were originally planned to serve the day-to-day convenience and service requirements of local residents, as well as having important roles for a variety of other local activities and uses.

11.25 The five Neighbourhood Centres in the District are very different in terms of their physical characteristics, environments and retail/service offer. As our study has demonstrated:

- **Bush Fair** and **The Stow** are the oldest purpose-built Neighbourhood Centres dating back to the 1950s. They are inward-facing centres with residential units on the upper floors. However, they suffer from poor public realms, dated street furniture, large areas of underused open space and unattractive service yards. Their retail offer is anchored by smaller convenience stores, such as Co-Op and One Stop.
- **Church Langley** is essentially an out-of-town Tesco foodstore with ancillary retail and service units.
- **Old Harlow** is an attractive centre that has a traditional village high street character and was Harlow's original settlement. Its convenience offer comprises a Somerfield foodstore, along with other comparison and service businesses.
- **Staple Tye** has undergone redevelopment in recent years. It comprises a purpose-built shopping parade with a covered walkway and served by surface car parking. Its convenience offer is anchored by a Lidl discount foodstore.

11.26 Each Neighbourhood Centre has a bakery and four of the centres have a newsagent. The provision of financial services varies between the centres. None of the Neighbourhood Centres have a building society and Bush Fair is the only centre with a bank. However, there is a cash point in each of the centres. With the exception of Staple Tye, all of the Neighbourhood Centres have a public house as well as a range of takeaways and cafes. The centres also provide essential services such as pharmacies, dry cleaners and laundrettes. Vacancy rates are generally low.

11.27 As you would expect of centres at this lower level in the retail hierarchy, comparison retailing is limited. Bush Fair and The Stow have a small amount of comparison retailing consisting of small independent, specialist retailers such as jewellers, pet shops, florists and ironmongers. Church Langley, Old Harlow and Staple Tye have a more limited offer.

11.28 The Neighbourhood Centres are complemented by a mix of community uses including health centres, community halls, libraries and dentists. These are often outside of the defined Neighbourhood Centre boundary, but are within walking distance of each centre. For example, The Stow has recently benefited from the c.£2.2 million redevelopment of Nuffield House, which includes a doctor's surgery, community nurses and speech and language therapy services. Old Harlow, The Stow and Staple Tye also have a library within their boundaries and Staple Tye has a health centre (Lister House) just on its boundary. Bush Fair is the only centre with a church.

11.29 Overall, the Neighbourhood Centres are well used and are an essential part of the retail hierarchy in Harlow. Policy RTCS17 of the Local Plan seeks to ensure that key facilities and a range of shops are retained in the Neighbourhood Centres. We consider that all the centres would benefit from public realm improvements, which would make them more attractive to local residents and operators. We also consider that Bush Fair and The Stow would benefit from partial redevelopment, to include the provision of a larger more modern convenience store offer to help underpin their overall vitality and viability. The potential for redevelopment is also supported by Policy RTCS18 of the Local Plan and the opportunities are discussed in more detail in Section 10.

Hatches

11.30 There are 18 Hatches in Harlow providing essential day-to-day services for local residents. The quality and offer of the Hatches varies considerably, ranging 220 from sq m to 1,358 sq m of floorspace and from two to twelve units. The Hatches provide services to residents and typically include a mix of retail and service uses and a community centre and/or public house.

11.31 Most of the Hatches comprise local convenience stores, takeaways, newsagents and public houses. Other uses include hairdressers, specialist retailers and service providers such as a Tile and Blind store, cafés and a pet grooming parlour. The Hatches also provide services such as recycling facilities, post boxes and telephone boxes. They include or are located in close proximity to community uses such as churches, health centres and schools, which provides opportunities for linked trips. Some also have large areas of open space for sporting and recreational activities.

11.32 The Hatches have good accessibility, linkages and connections to surrounding residential areas. Many have dedicated car parking and cycle racks as well as being located close to local bus services and within walking distance of local resident populations. Although it should be noted that some of the Hatches suffer from their proximity to roads by way of noise and pedestrian accessibility.

11.33 The majority of the Hatches are single-storey flat roofed buildings. Many of the shop units lack active frontages. For example, most of the takeaways are often shut up during the day, which detracts from the overall vitality and viability of the centres. Many of the community centres also appear to be underused and suffer from a lack of investment.

11.34 We consider that the majority of the Hatches would benefit from some form of investment to ensure their continued long-term viability. In particular, Burgoyne, Cawley, Clifton and Slacksbury Hatches would benefit from environmental improvements and upgrades to the public realm such as more soft landscaping, CCTV and improved street lighting.

Retail Capacity Assessment

11.35 Our quantitative need assessment in Section 8 shows that there is a strong projected growth in comparison goods expenditure across the study area of +106.7% between 2007 and 2021, and a lower projected growth for convenience goods retailing of +21.5%. The difference in the overall growth for comparison and convenience goods spend has direct implications for the quantum of new retail floorspace that can be supported in the District and its main centres over the forecast period.

11.36 As our analysis has shown, the existing convenience floorspace and foodstores across the District appear to be trading well, either in line with or above their national company averages. Only the new Asda store opened as part of The Water Gardens development in the town centre appears to be under-performing, based on the market shares derived from the household survey. However, we consider that this could be explained by the fact that it has not yet achieved settled trading patterns since it opened.

11.37 Our capacity assessment indicates that there is no quantitative capacity for new convenience floorspace across the District until 2021, when there is a projected residual expenditure of circa £9.3m. This would not support a major foodstore operator, but could support a smaller convenience store or discount food operator of c.2,200 sqm net. Assuming that the District's existing convenience floorspace is in 'equilibrium' at the base year, then we forecast that the residual spend could rise to c.£13.9m by 2021, which would support a smaller convenience/discount store (or stores) of 3,275 sqm net. Given the qualitative 'gap' in the convenience offer of some of the Neighbourhood Centres, particularly The Stow and Bush Fair, we recommend that this identified quantitative need be located in these centres first to promote more sustainable shopping patterns and help 'claw back' a proportion of local spend currently going to larger out-of-centre stores in the District.

11.38 Our projections for the District as a whole indicate that there could be the potential capacity for 14,440 sqm net of new comparison goods retail floorspace in 2011, based on a residual expenditure of £76.6m. This is forecast to increase to 61,528 sqm net by 2021. However, these figures take no account of the potential uplift in market shares and capacity that should arise from new high quality retail and mixed use development schemes in the town centre, both planned (i.e. the Harvey Centre extension) and proposed (such as Town Centre North).

11.39 Our quantitative assessment indicates that Harlow town centre's existing floorspace and businesses are trading strongly. We have tested the potential capacity that could arise 'with' and 'without' the Harvey Centre extension, as well as the likely uplift in market shares that could result from new development in the town centre. The table below summarises the key findings of the three different 'scenarios'.

Table 11.1: Harlow Town Centre: Comparison Goods Floorspace Capacity (square metres net)

		2011	2016	2021
Scenario 1:	Assumes no Harvey Centre extension and no demolition of existing town centre floorspace:	9,072	22,607	38,645
Scenario 2:	Assumes Harvey Centre extension and demolition of existing town centre floorspace:	1,913	15,448	31,486
Scenario 3:	Assumes uplift in town centre market shares from 19% to 22% up to 2021 due to new town centre development and investment, after taking account of the Harvey Centre extension:	3,010	31,044	50,146

[1] Based on an average sales density of £5,000 per sqm for new floorspace and an allowance for a 1.5% per annum growth in efficiency.

11.40 The table shows that there could be the potential capacity for up to 31,044 sqm net of new comparison goods retail floorspace by 2016, rising to 50,146 sqm net by 2021, assuming that the Harvey Centre extension proceeds as planned.

11.41 For both the convenience and comparison goods capacity assessments we advise the Council to monitor and review the forecasts to take account of any updates to the population and expenditure projections, as well as the potential impact of new and emerging town centre development schemes.

Leisure and Office Needs Assessment

11.42 Our assessment of the commercial leisure sector in the District indicates that there is a reasonable range of commercial leisure facilities including a cinema, bingo, ten-pin bowling, bars, restaurants, and health and fitness clubs. It is apparent that much of this provision is based in and around Harlow town centre.

11.43 In terms of cinemas, the provision is confined to the out-of-centre Cineworld at the Queensgate Centre. Our study has found that the number of screens in the District is below what would be expected, given the size of the population. We therefore consider that there is a qualitative and quantitative need for a further cinema, which in accordance with PPS6, should be directed towards the town centre.

11.44 There is projected to be around a 30% growth in available leisure expenditure within the District by 2016. Given the trend towards mixed use town centre schemes and the strong growth in expenditure in this sector, we advise that town centre comparison goods retail schemes should comprise at least 15% of leisure floorspace.

11.45 It is also important that the Neighbourhood Centres and Hatches benefit from this growth. Furthermore, the pubs in most of the neighbourhood centres and hatches are important attractors and anchors, as part of the wider overall vitality and viability of these centres.

11.46 Harlow has a more limited office market, although there are some modern facilities at Harlow Business Park and the area around the station. We recommend that any emerging demand for significant new office space in the District should be directed towards the town centre first, in line with PPS6.

Opportunities for Growth

11.47 It is clear that the identified qualitative need and forecast capacity for new retail, leisure, office and other town centre uses identified by our study should be located in the town centre first, in accordance with the sequential approach.

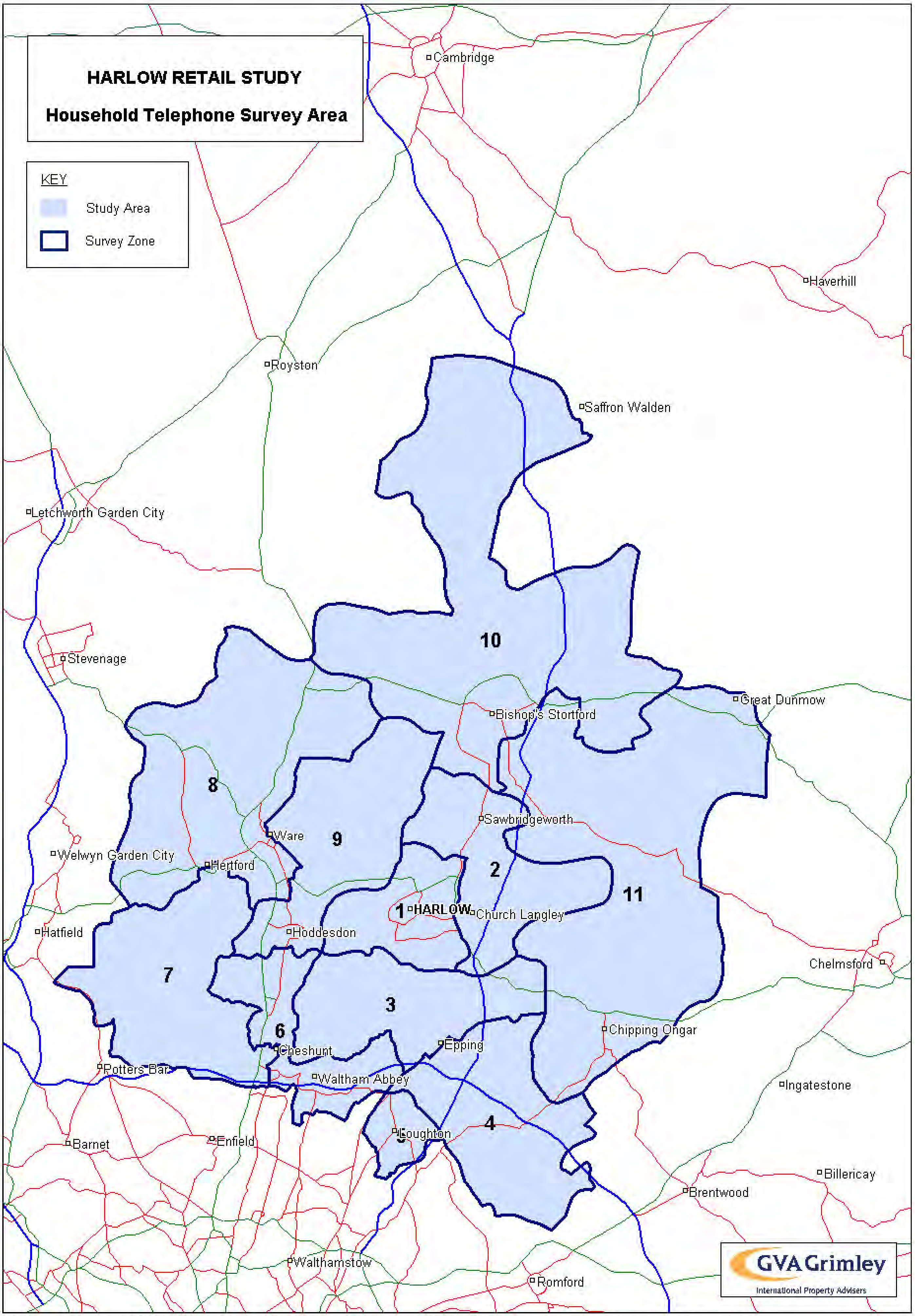
11.48 Our study has been prepared at a time when Harlow District Council and Harlow Renaissance Partnership are promoting significant new potential development opportunity sites in the town centre to address the deficiencies in the critical mass and quality of its retail offer benchmarked against other competing centres in the region. The Town Centre Strategy that has been prepared in parallel with this study provides the framework to inform and guide change and growth in the town centre over the short, medium and longer term. This includes the selection of a development partner or partners for specific areas and sites, with the priority being Town Centre North.

11.49 With regard to The Stow and Bush Fair Neighbourhood Centres, we consider that the Council is in a strong position to help promote and deliver new development in these centres as it owns their freehold. Although more detail financial appraisals and market testing would be needed to understand the viability and demand for new development, we believe that there is significant potential over the next five year period to deliver significant change in these centres to help maintain and enhance their overall vitality and viability.

11.50 We recommend that the Council assess the interest from supermarket operators to anchor the retail offer of these shopping precincts through partial redevelopment, as we consider that this would help to strengthen their overall role and function. In terms of delivery, the preferred 'model' would be to form a partnership with a supermarket operator, if there is sufficient interest. However, the first step in securing market interest could require the preparation of Area Action Plans (AAP) or development briefs for the Neighbourhood Centres, which would then be embedded in policy as Supplementary Planning Documents (SPDs).

PLAN 1

HOUSEHOLD TELEPHONE SURVEY AREA



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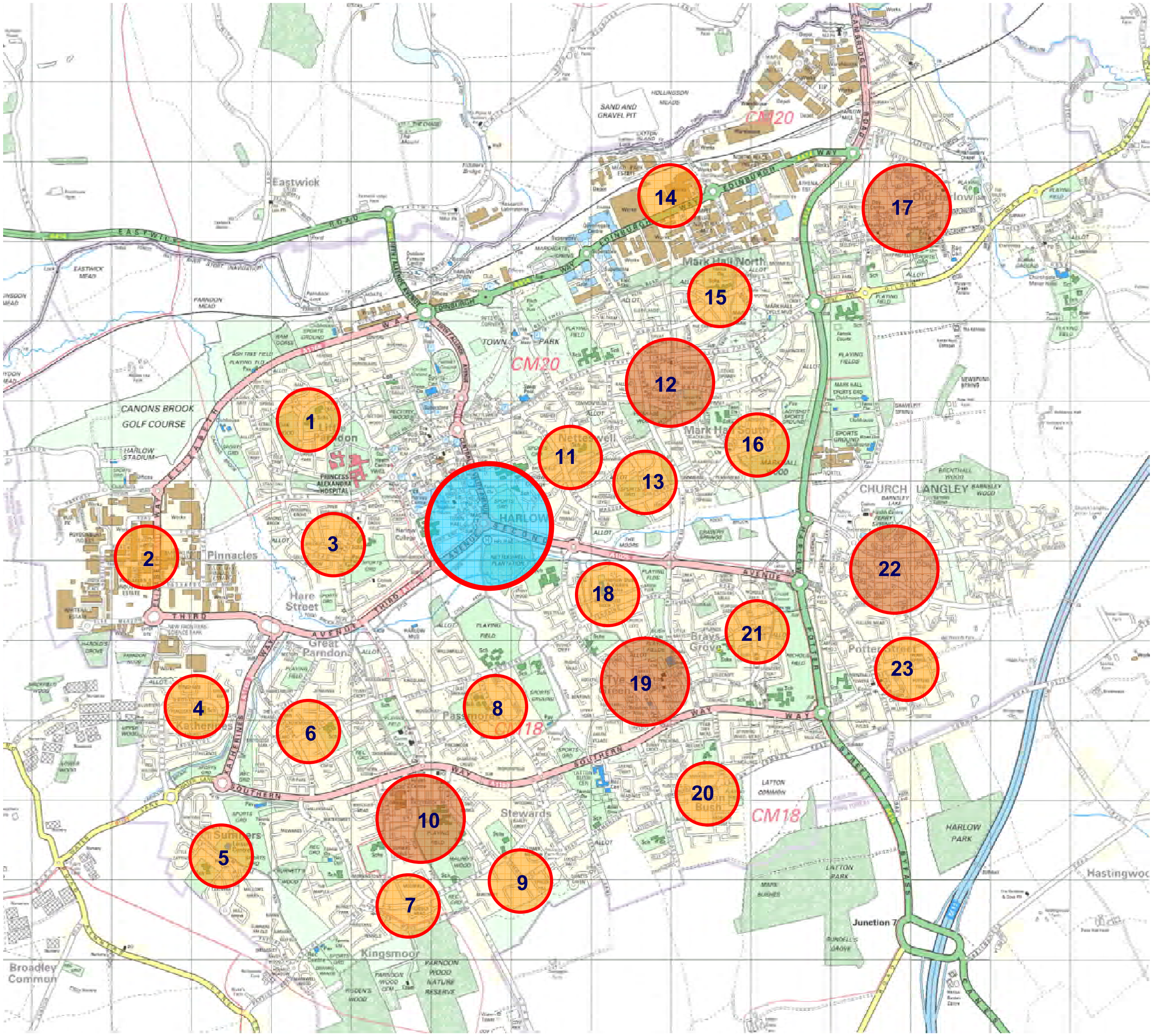
PLAN 2

NEIGHBOURHOOD CENTRES AND HATCHES LOCATION PLAN

Neighbourhood Centres and Hatches Location Plan



Town Centre

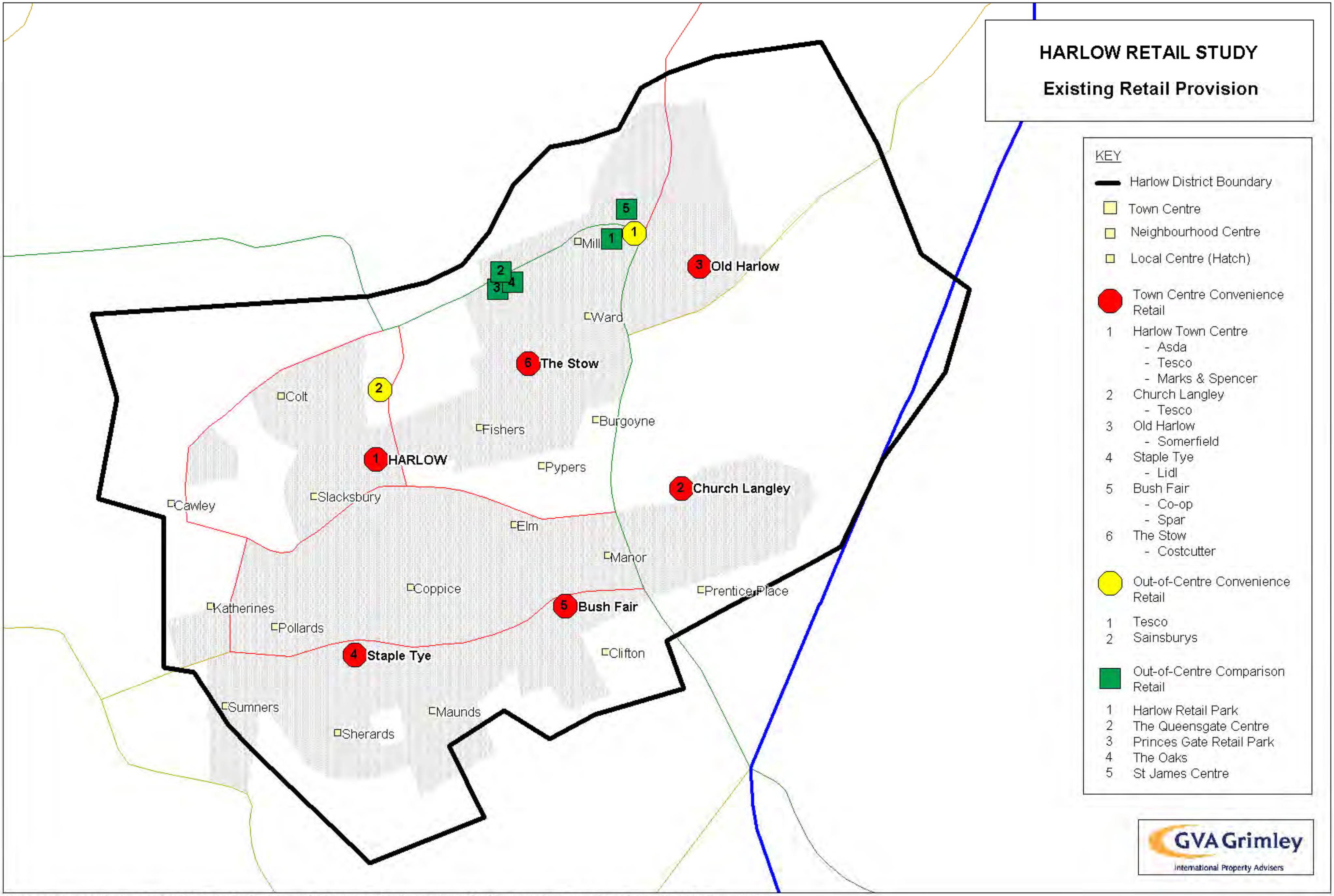
Neighbourhood Centres

Hatches

1. Colt
2. Cawley
3. Slacksbury
4. Katherines
5. Sumners
6. Pollards
7. Sherards
8. Copic
9. Maunds
10. Staple Tye
11. Fishers
12. The Stow
13. Pypers
14. Mill
15. Ward
16. Burgoyne
17. Old Harlow
18. Elm
19. Bush Fair
20. Clifton
21. Manor
22. Church Langley
23. Prentice Place

PLAN 3

EXISTING RETAIL PROVISION


HARLOW RETAIL STUDY
Existing Retail Provision
KEY
Harlow District Boundary
Town Centre
Neighbourhood Centre
Local Centre (Hatch)
Town Centre Convenience Retail
1 Harlow Town Centre
- Asda
- Tesco
- Marks & Spencer
2 Church Langley
- Tesco
3 Old Harlow
- Somerfield
4 Staple Tye
- Lidl
5 Bush Fair
- Co-op
- Spar
6 The Stow
- Costcutter
Out-of-Centre Convenience Retail
1 Tesco
2 Sainsburys
Out-of-Centre Comparison Retail
1 Harlow Retail Park
2 The Queensgate Centre
3 Princes Gate Retail Park
4 The Oaks
5 St James Centre
Old Harlow
The Stow
HARLOW
Church Langley
Bush Fair
Staple Tye
Mill
Ward
Colt
Fishers
Burgoyne
Pypers
Cawley
Slacksbury
Elm
Manor
Coppice
Prentice Place
Katherines
Pollards
Clifton
Sumners
Maunds
Sherards
GVA Grimley
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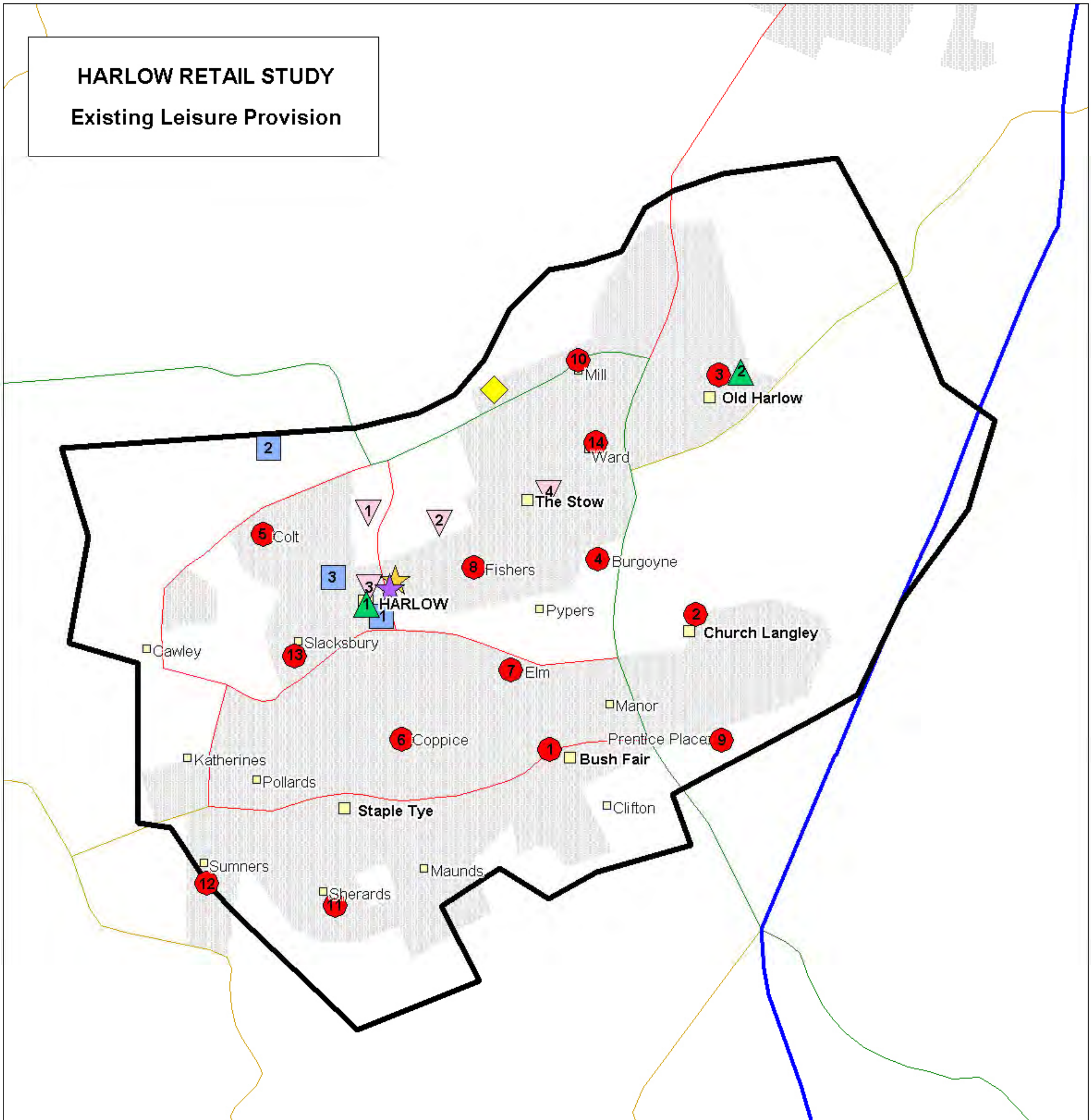
PLAN 4

EXISTING LEISURE PROVISION

HARLOW RETAIL STUDY

Existing Leisure Provision



KEY

Harlow District Boundary

Town Centre

Neighbourhood Centre

Local Centre (Hatch)

Cinema

Cineworld, Harlow

Bingo

Mecca Bingo, Harlow

Bowling

First Bowl, Harlow

Public House

1 The Poplar Kitten, Bush Fair
2 Potters Arms, Church Langley
3 The George, Old Harlow
4 The Purple Emperor, Burgoyne Hatch
5 The Shark, Colt Hatch
6 The Archers Dart, Coppice Hatch
7 Hummingbird, Elm Hatch
8 The Garden Tiger, Fishers Hatch,
9 The Red Lion, Prentice Place Hatch
10 Heart and Club, Pypers Hatch
11 The Drinker Moth, Sherards Hatch
12 The Herald, Sumners Hatch
13 Golden Swift, Slacksbury Hatch
14 The White Admiral, Ward Hatch

Health & Fitness

1 Harlow Sports Centre
2 Harlow Pool & Fitness Centre
3 Esporta
4 Body Active

Theatre

1 Playhouse, Harlow
2 Victoria Hall, Harlow

Arts Centre

1 Gibberd Gallery
2 Pardon Mill
3 The Square

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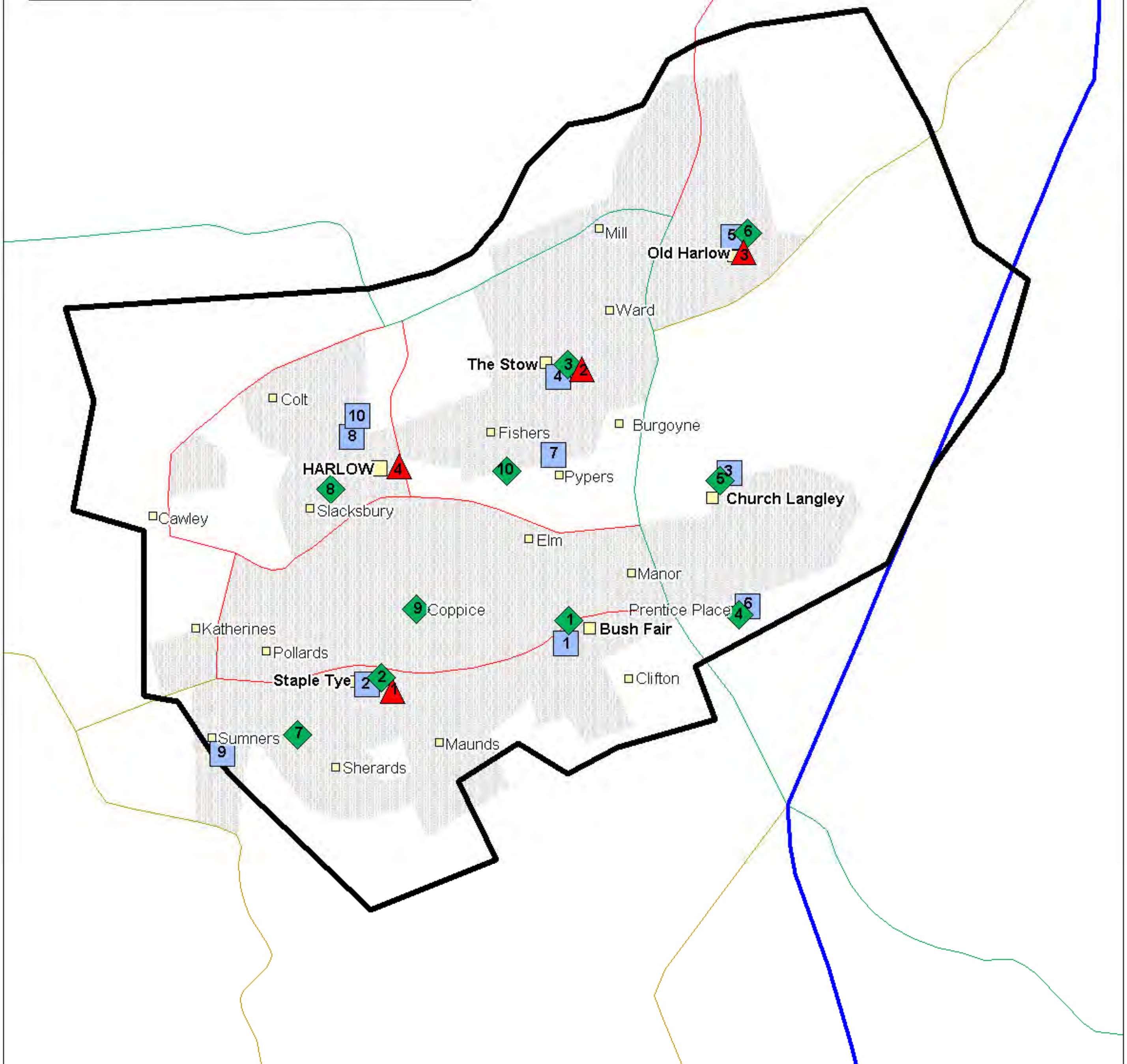
PLAN 5

EXISTING COMMUNITY FACILITIES

HARLOW RETAIL STUDY

Existing Community Facilities Provision



KEY

- Harlow District Boundary
- Town Centre
- Neighbourhood Centre
- Local Centre (Hatch)

Library

1 Great Parndon Library
2 Mark Hall Library
3 Old Harlow Library
4 Harlow Central Library

Community Centre

1 Tye Green Community Centre
2 Great Parndon Community Association
3 Moot House
4 Potter Street Community Association
5 Church Langley Community Centre
6 St Johns Arts and Recreation Centre
7 Kingsmoor House Family Centre
8 Hare Street Family Centre
9 Coppice Hatch Common Room
10 Dashes Family Resource Centre

Health Centre

1 Keats House Health Centre
2 Lister Medical Health Centre
3 Florence Nightingale Health Centre
4 Nuffield House Health Centre
5 Jenner House Health Centre
6 Osler House Health Centre
7 Sydenham House Health Centre
8 Addison House
9 Barbara Castle Medical Practice
10 NHS Walk-In Centre

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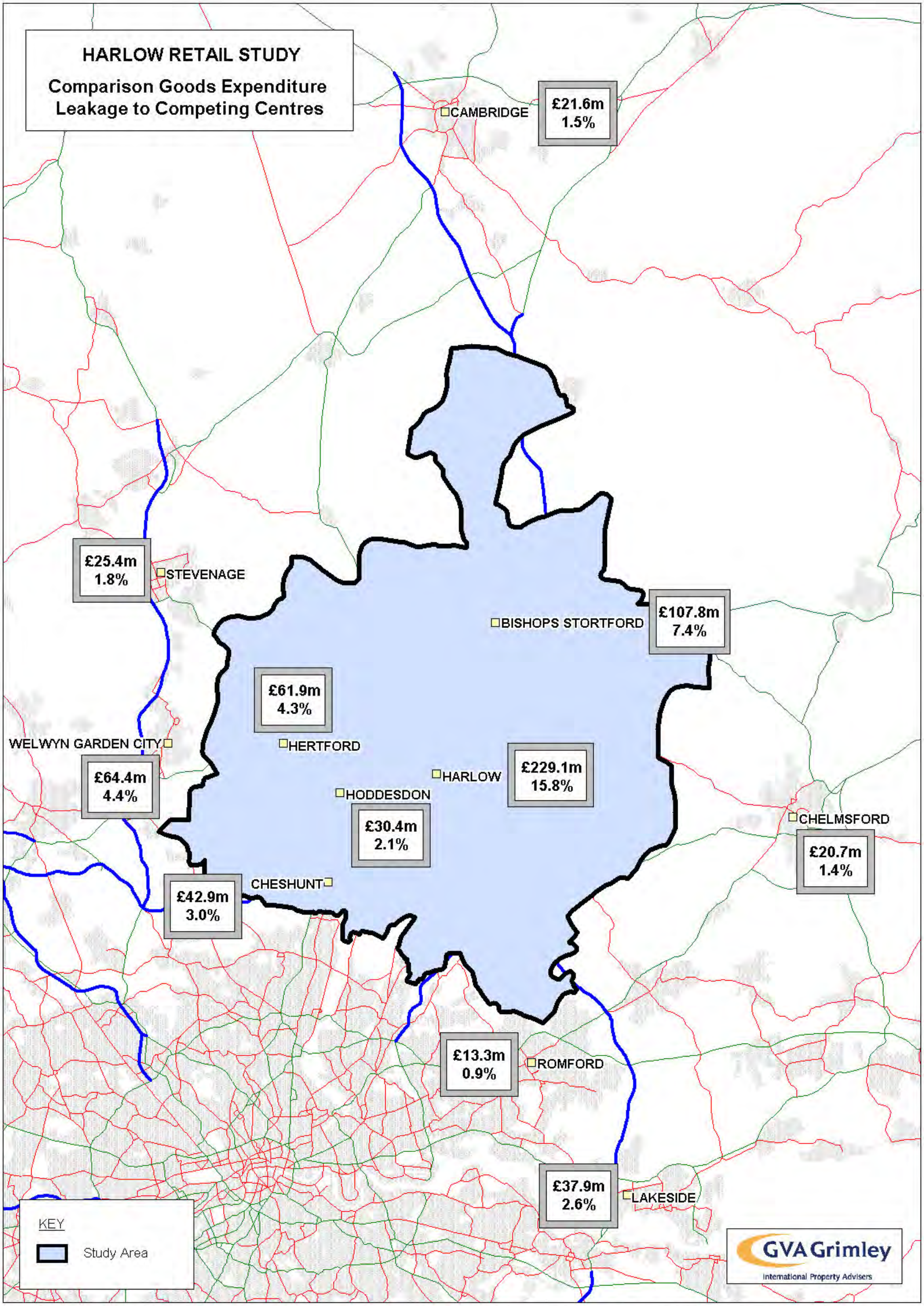
PLAN 6

COMPARISON GOODS EXPENDITURE LEAKAGE TO COMPETING CENTRES



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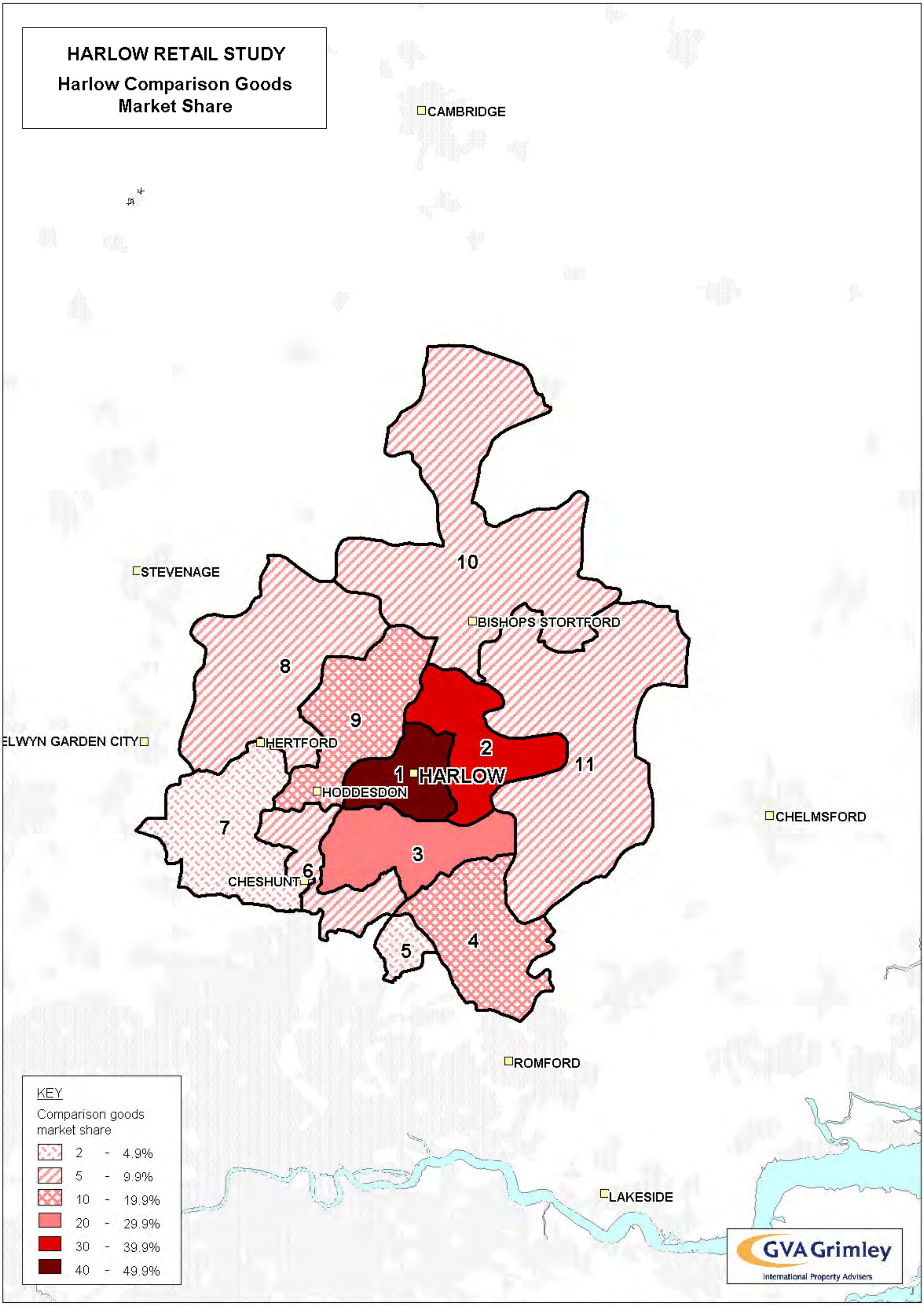
PLAN 7

HARLOW COMPARISON GOODS MARKET SHARE



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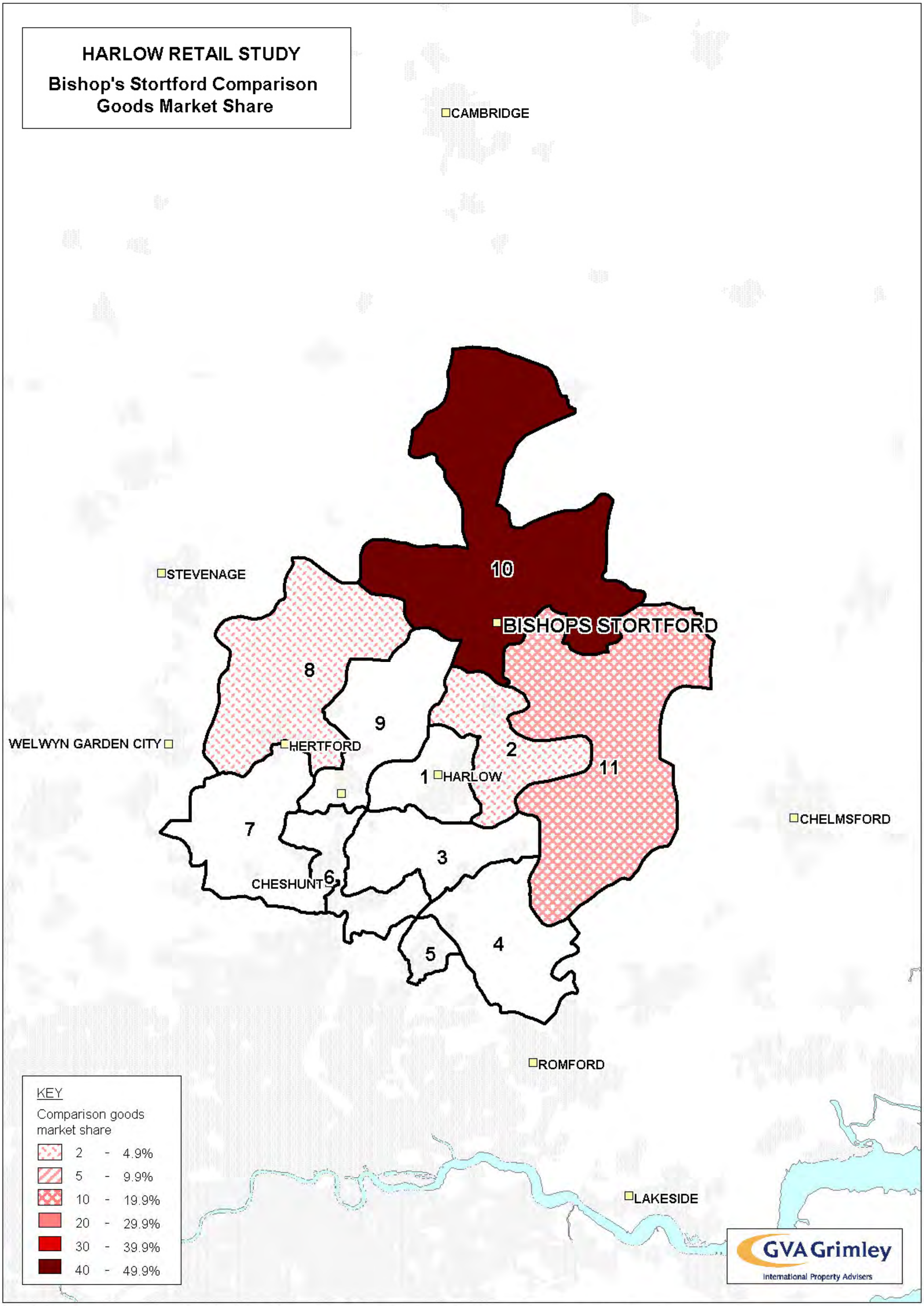
PLAN 8

COMPETING CENTRE’S MARKET SHARES



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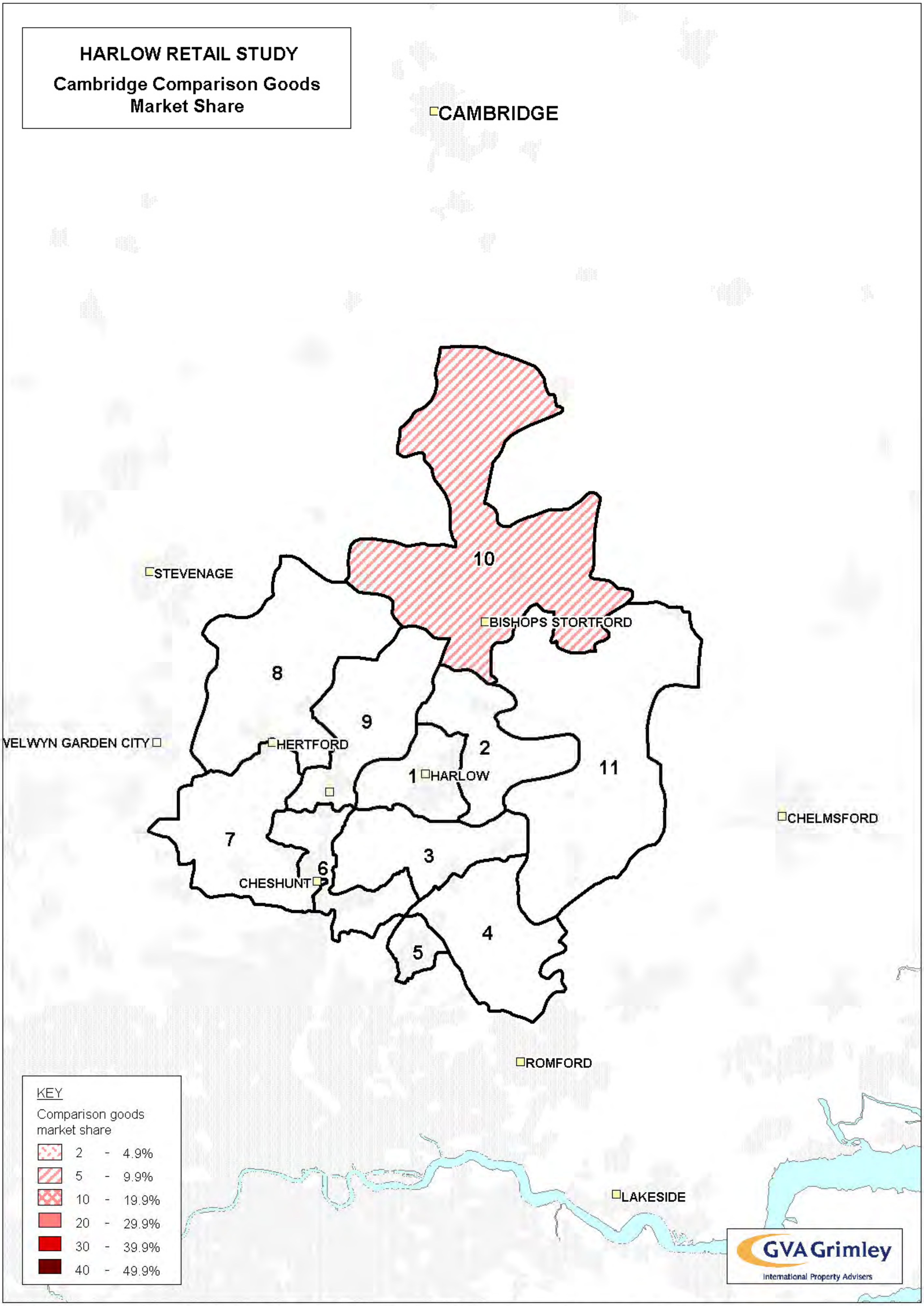

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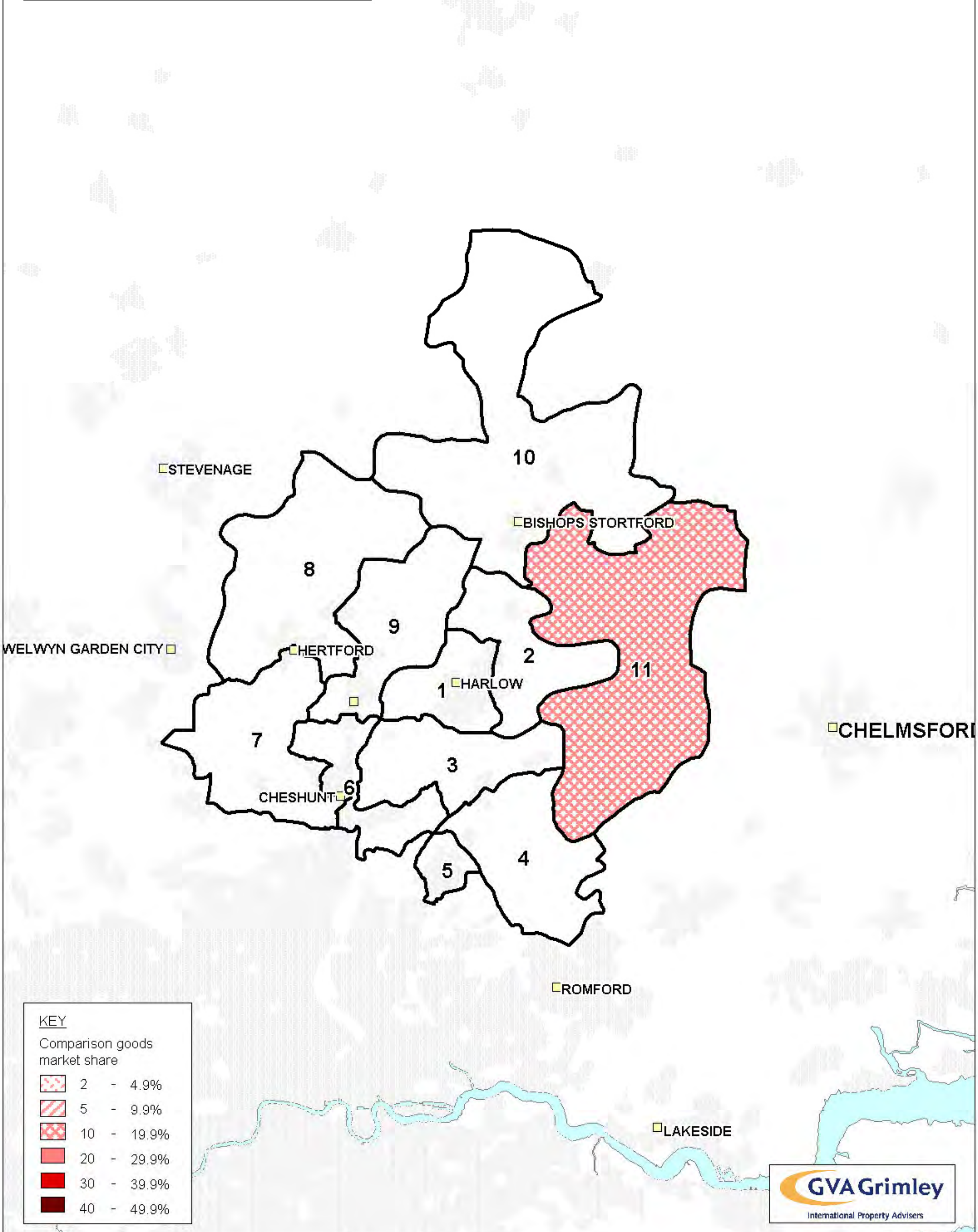
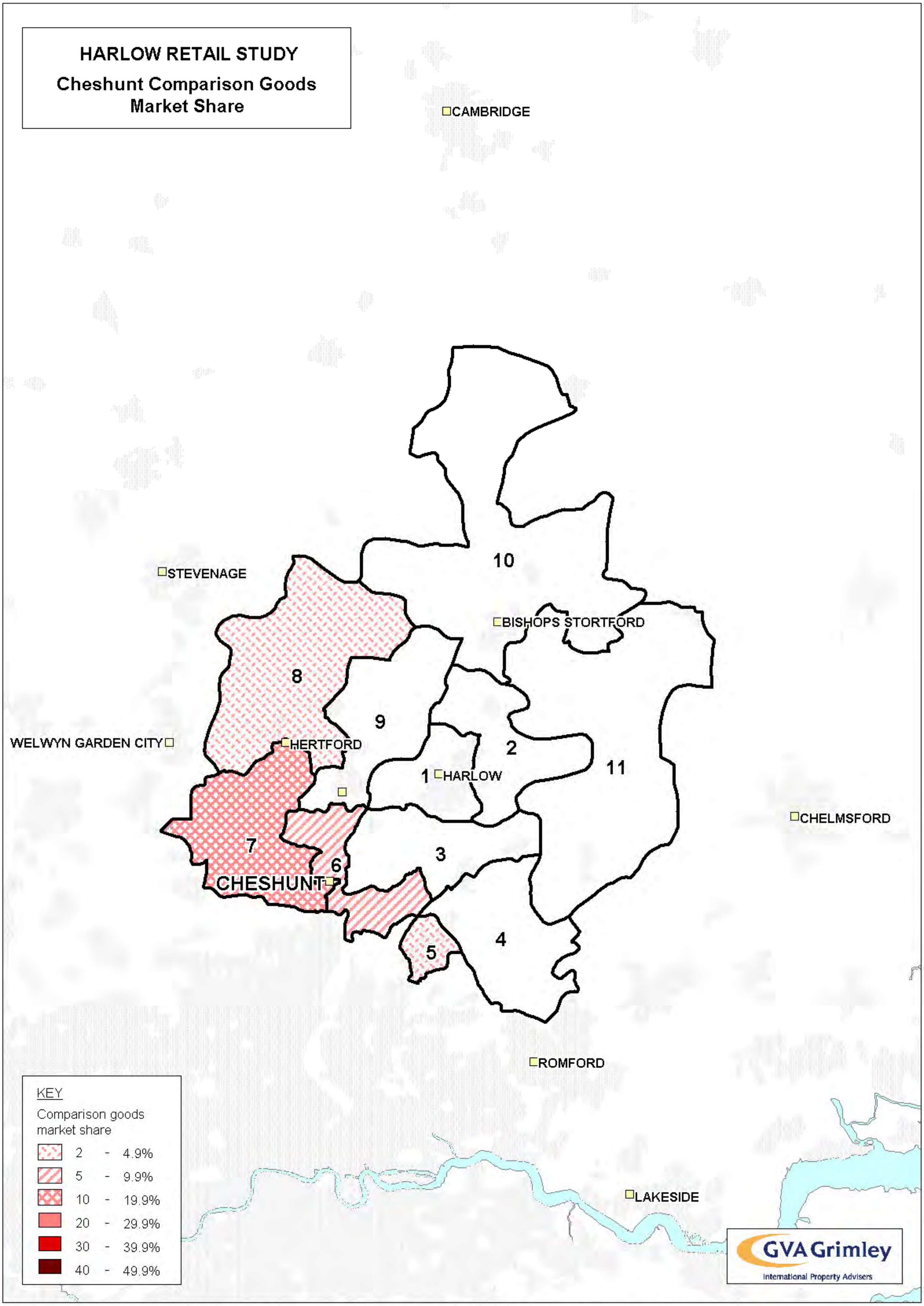
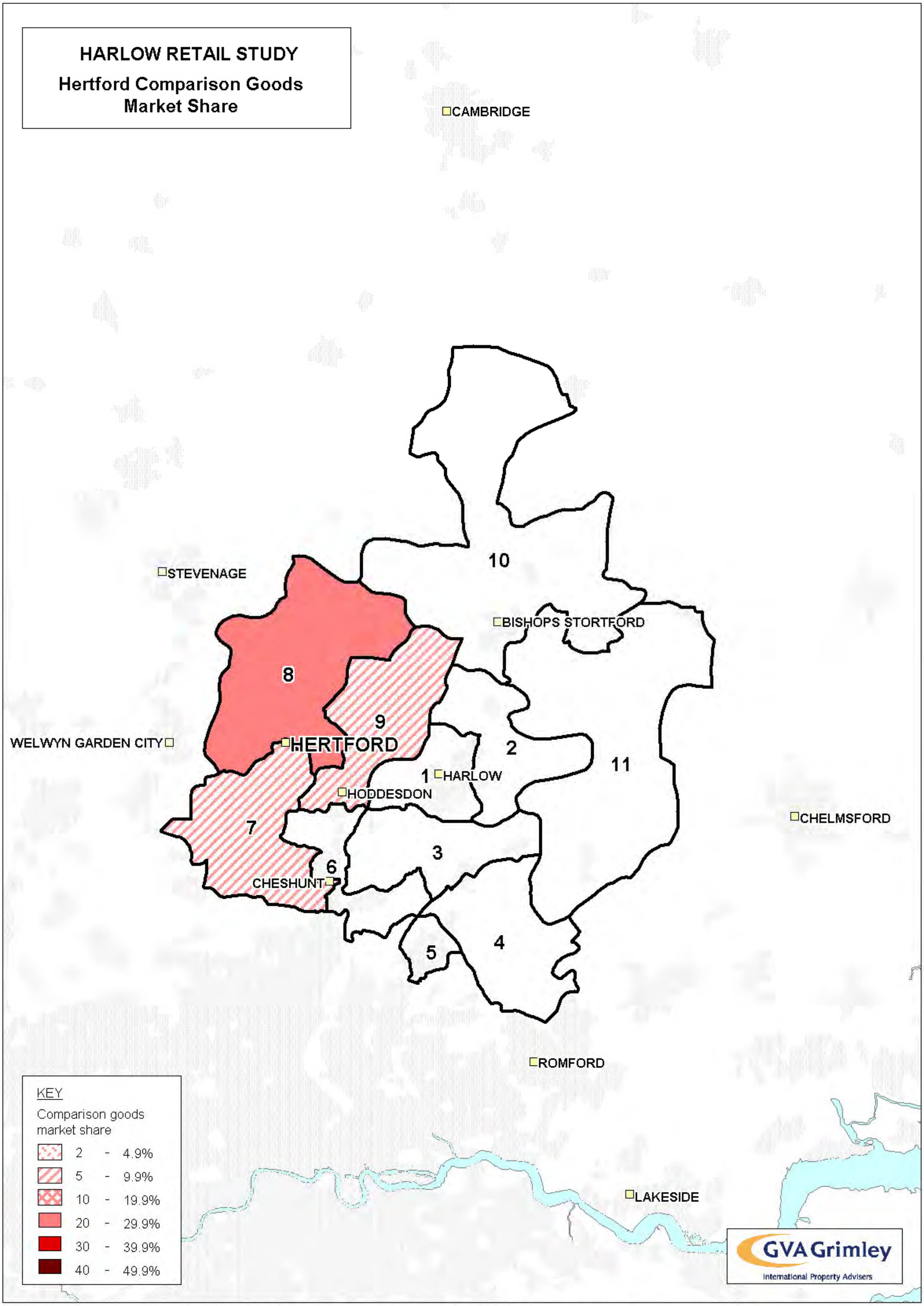
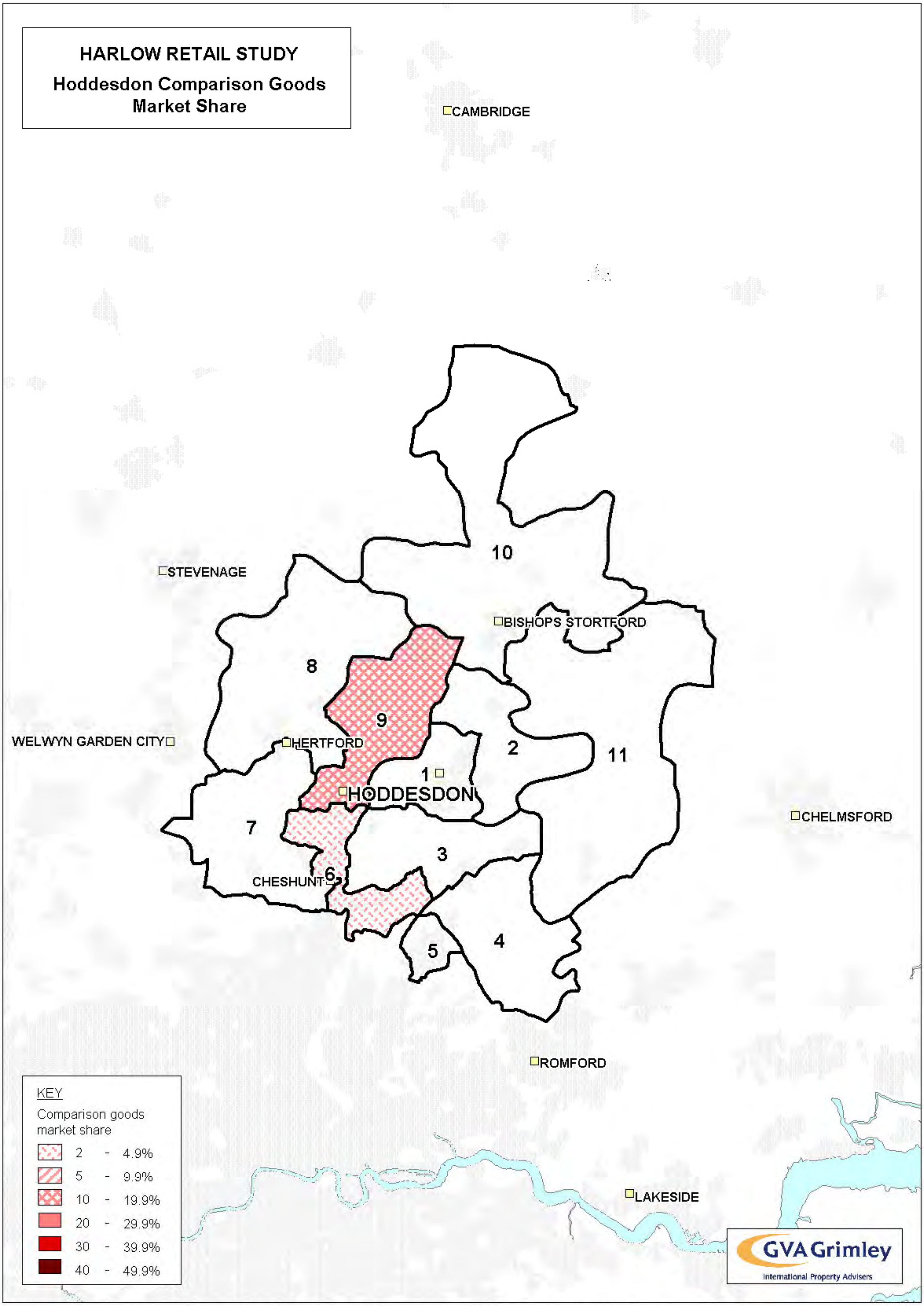
HARLOW RETAIL STUDY

Chelmsford Comparison Goods Market Share

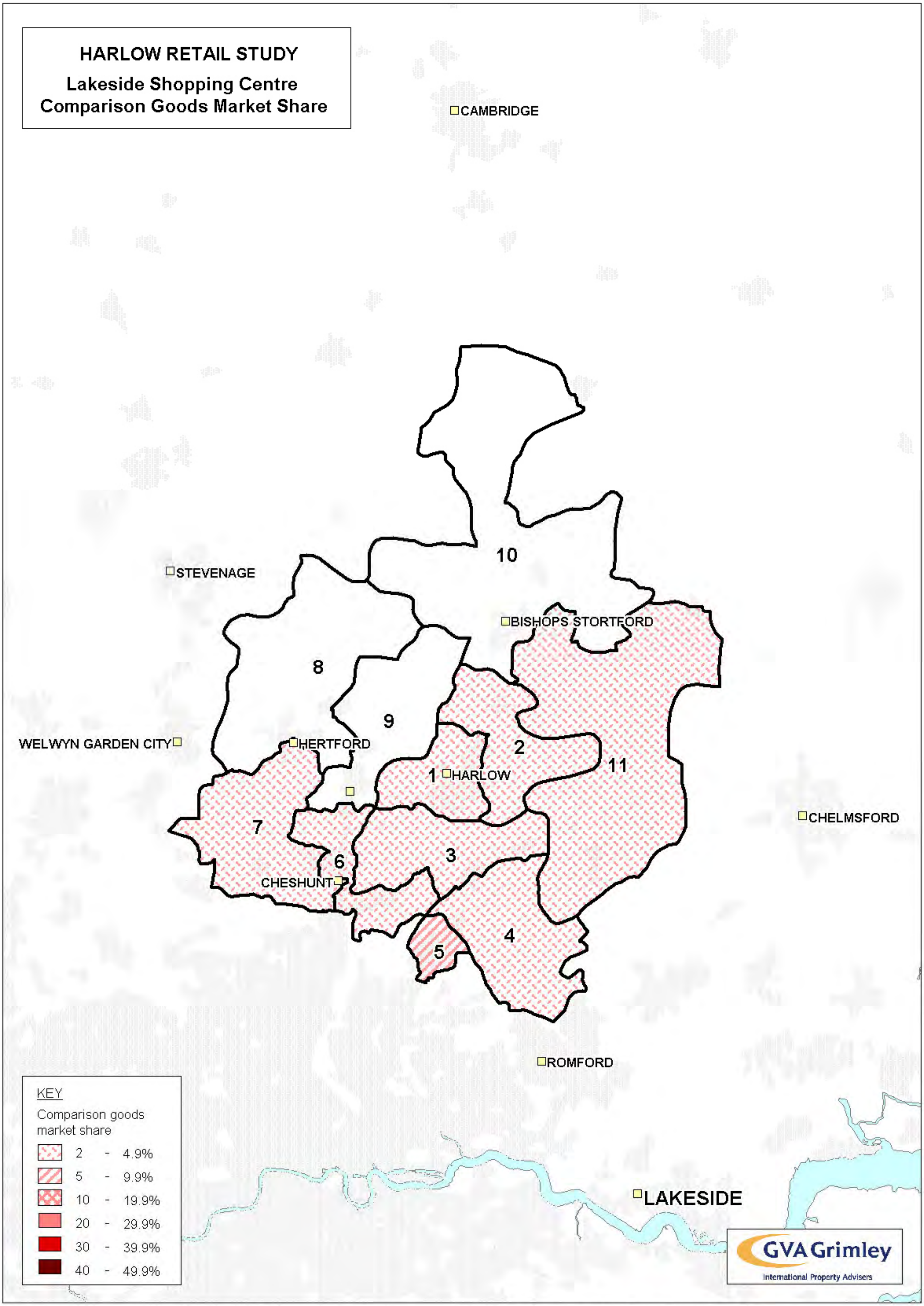



HARLOW RETAIL STUDY
Cheshunt Comparison Goods
Market Share
CAMBRIDGE
STEVENAGE
WELWYN GARDEN CITY
HERTFORD
BISHOPS STORTFORD
HARLOW
CHESHUNT
CHELMSFORD
ROMFORD
LAKESIDE
1
2
3
4
5
6
7
8
9
10
11
KEY
Comparison goods market share
2 - 4.9%
5 - 9.9%
10 - 19.9%
20 - 29.9%
30 - 39.9%
40 - 49.9%
GVA Grimley
International Property Advisers


HARLOW RETAIL STUDY
Hertford Comparison Goods
Market Share
CAMBRIDGE
STEVENAGE
WELWYN GARDEN CITY
HERTFORD
BISHOPS STORTFORD
HARLOW
HODDESDON
CHESHUNT
CHELMSFORD
ROMFORD
LAKESIDE
1
2
3
4
5
6
7
8
9
10
11
KEY
Comparison goods
market share
2 - 4.9%
5 - 9.9%
10 - 19.9%
20 - 29.9%
30 - 39.9%
40 - 49.9%
GVA Grimley
International Property Advisers



HARLOW RETAIL STUDY
Hoddesdon Comparison Goods Market Share
CAMBRIDGE
STEVENAGE
BISHOPS STORTFORD
WELWYN GARDEN CITY
HERTFORD
HODDESDON
CHESHUNT
CHELMSFORD
ROMFORD
LAKESIDE
1
2
3
4
5
6
7
8
9
10
11
KEY
Comparison goods market share
2 - 4.9%
5 - 9.9%
10 - 19.9%
20 - 29.9%
30 - 39.9%
40 - 49.9%
GVA Grimley
International Property Advisers



HARLOW RETAIL STUDY
Lakeside Shopping Centre
Comparison Goods Market Share
CAMBRIDGE
STEVENAGE
BISHOPS STORTFORD
WELWYN GARDEN CITY
HERTFORD
HARLOW
CHELMSFORD
CHESHUNT
ROMFORD
LAKESIDE
1
2
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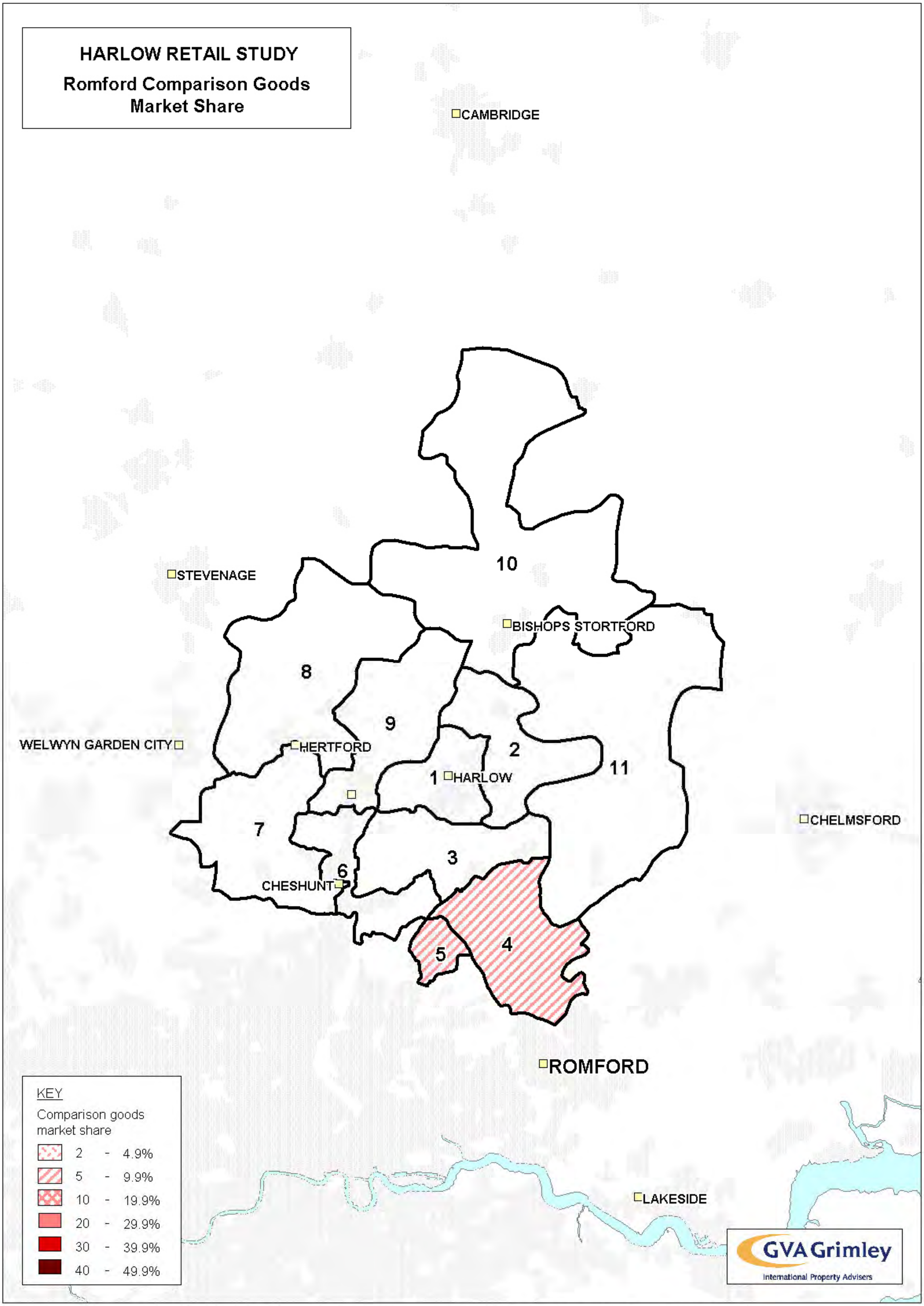
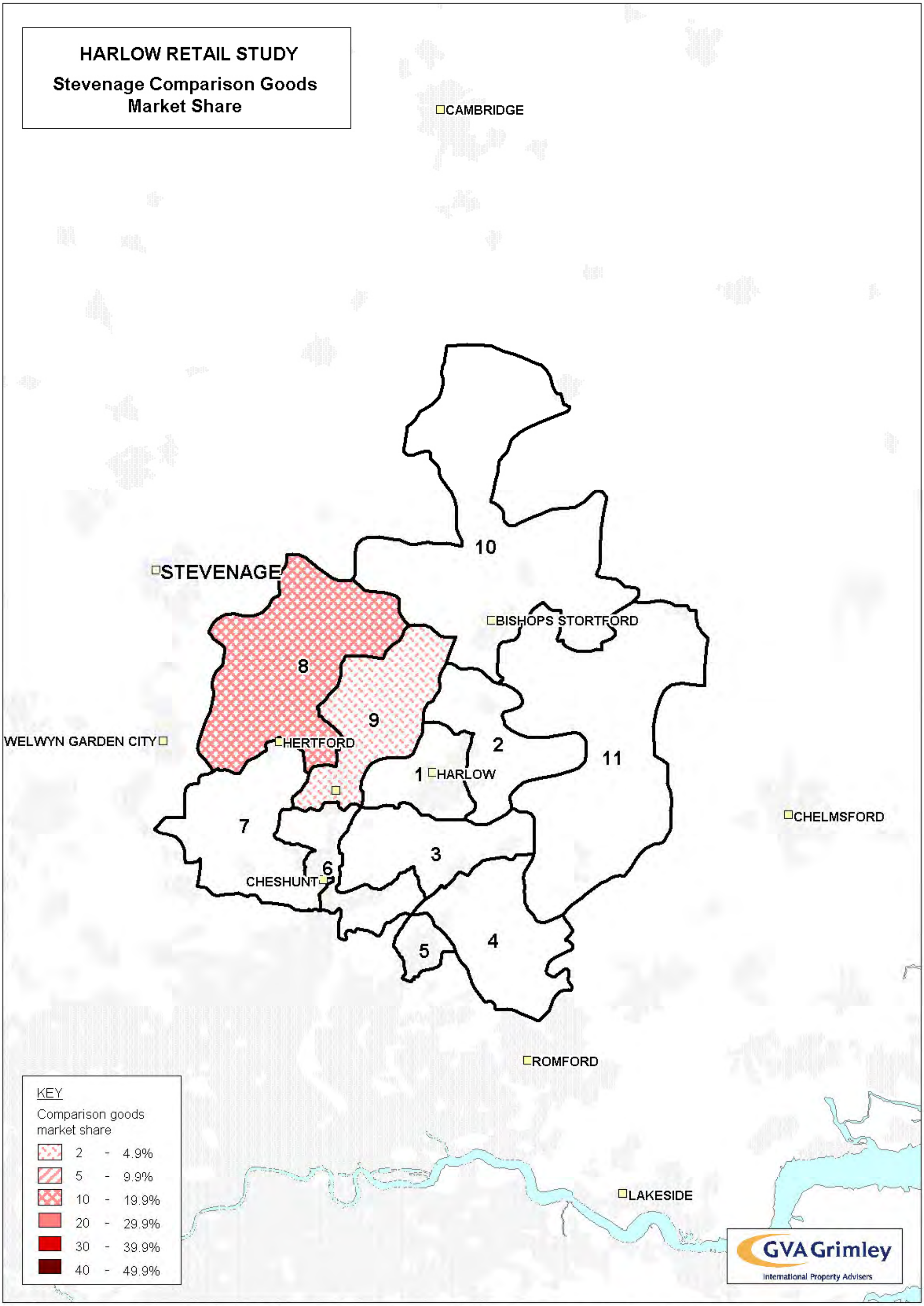
11
KEY
Comparison goods market share
2 - 4.9%
5 - 9.9%
10 - 19.9%
20 - 29.9%
30 - 39.9%
40 - 49.9%
GVA Grimley
International Property Advisers



HARLOW RETAIL STUDY
Romford Comparison Goods
Market Share
CAMBRIDGE
STEVENAGE
BISHOPS STORTFORD
10
8
9
2
1
11
WELWYN GARDEN CITY
HERTFORD
HARLOW
CHELMSFORD
7
3
6
CHESHUNT
4
5
ROMFORD
LAKESIDE
KEY
Comparison goods
market share
2 - 4.9%
5 - 9.9%
10 - 19.9%
20 - 29.9%
30 - 39.9%
40 - 49.9%
GVA Grimley
International Property Advisers


HARLOW RETAIL STUDY
Stevenage Comparison Goods Market Share
CAMBRIDGE
STEVENAGE
BISHOPS STORTFORD
WELWYN GARDEN CITY
HERTFORD
HARLOW
CHELMSFORD
CHESHUNT
ROMFORD
LAKESIDE
1
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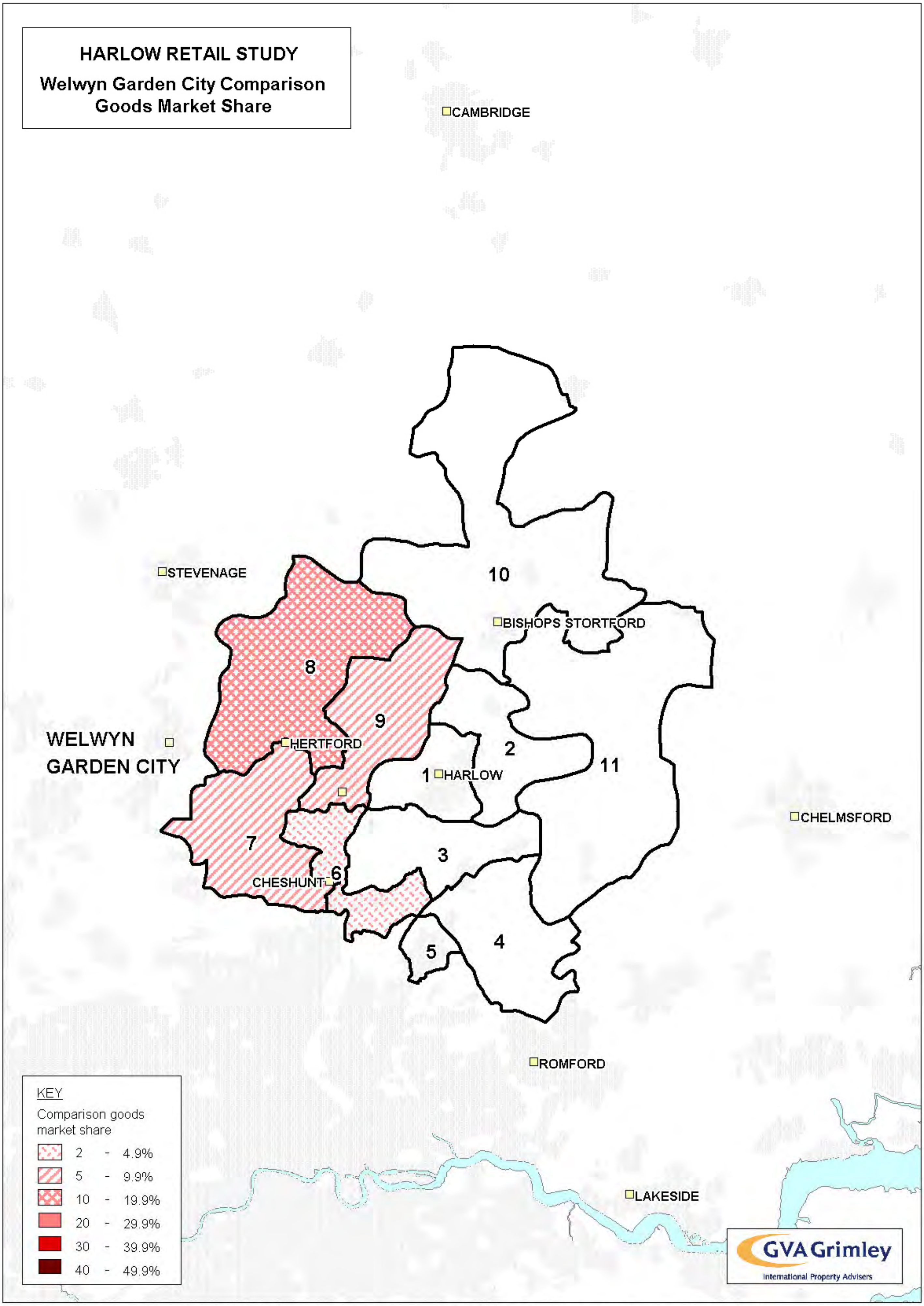
8
9
10
11
KEY
Comparison goods market share
2 - 4.9%
5 - 9.9%
10 - 19.9%
20 - 29.9%
30 - 39.9%
40 - 49.9%
GVA Grimley
International Property Advisers



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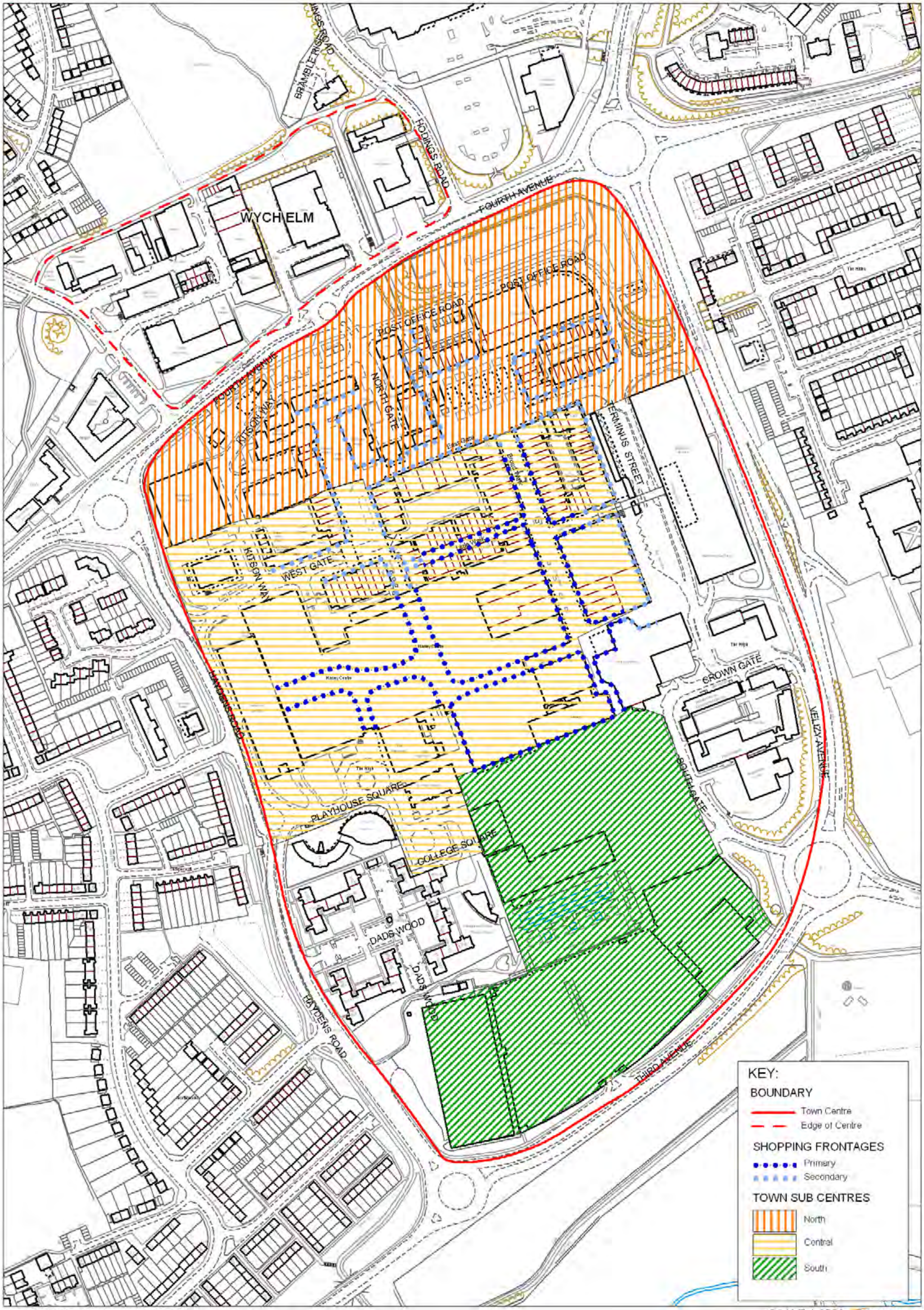
PLAN 9

HARLOW TOWN CENTRE SUB AREAS



HARLOW TOWN CENTRE

SCALE 1:2500 GVA Grimley

APPENIDIX 1

TRADING INFLUENCE OF COMPETING CENTRES

HARLOW RETAIL STUDY, 2006

TABLE 1
COMPARISON GOODS ALLOCATION 2006
% 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	BISHOPS STORTFORD	0.6	6.6	0.0	0.4	0.0	0.0	0.0	2.4	1.5	40.8	11.6
2	CHESHUNT	0.5	0.5	0.6	0.5	2.5	7.8	10.0	3.0	1.4	0.3	0.0
3	WELWYN GARDEN CITY	0.9	1.9	1.5	0.8	0.6	3.1	8.0	15.8	8.4	1.8	0.0
4	LAKESIDE	2.5	4.2	3.1	3.9	6.7	4.8	2.1	0.5	1.0	0.4	3.2
5	HERTFORD	0.2	1.3	0.3	0.0	0.0	0.8	6.9	24.4	5.4	0.1	1.2
6	CHELMSFORD	0.4	1.1	1.9	0.2	0.3	0.3	0.4	0.0	0.0	0.7	17.5
7	ROMFORD	0.1	0.5	1.9	7.8	6.6	0.3	0.0	0.0	0.0	0.0	1.4
8	CAMBRIDGE	0.3	0.6	0.3	0.0	0.0	0.0	0.0	0.3	0.0	9.1	1.4
9	STEVENAGE	0.5	0.1	0.0	0.1	0.4	0.7	1.5	10.4	2.1	0.3	0.0
10	HODDESDON	0.0	0.0	1.7	0.0	0.0	4.5	0.2	0.3	15.4	0.0	0.0
	SUB-TOTAL	**5.8**	**16.8**	**11.2**	**13.7**	**17.0**	**22.2**	**29.3**	**57.1**	**35.2**	**53.4**	**36.2**
	Other	94.2	83.2	88.8	86.3	83.0	77.8	70.7	42.9	64.8	46.6	63.8
	TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Household Survey, DATE

TABLE 2
COMPARISON GOODS ALLOCATION 2006
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	BISHOPS STORTFORD	1,243	6,700	21	209	0	0	0	3,982	1,935	84,056	9,697	**107,843**
2	CHESHUNT	1,072	550	301	283	2,216	15,903	15,469	4,811	1,782	521	0	**42,908**
3	WELWYN GARDEN CITY	1,847	1,926	789	414	556	6,381	12,335	25,678	10,665	3,783	0	**64,372**
4	LAKESIDE	5,348	4,330	1,601	2,036	5,997	9,737	3,275	884	1,263	752	2,719	**37,942**
5	HERTFORD	331	1,284	132	0	0	1,729	10,664	39,740	6,798	232	1,028	**61,937**
6	CHELMSFORD	877	1,162	979	98	277	516	602	0	0	1,501	14,644	**20,656**
7	ROMFORD	195	472	983	4,045	5,964	516	0	0	0	0	1,143	**13,319**
8	CAMBRIDGE	546	564	132	0	0	0	0	472	0	18,704	1,141	**21,558**
9	STEVENAGE	1,013	146	0	74	327	1,339	2,364	16,932	2,672	551	0	**25,417**
10	HODDESDON	0	0	908	0	0	9,149	385	533	19,432	0	0	**30,407**
	SUB-TOTAL	**12,472**	**17,134**	**5,845**	**7,159**	**15,336**	**45,270**	**45,094**	**93,032**	**44,547**	**110,100**	**30,371**	**426,360**
	Other	203,619	84,956	46,197	44,970	74,836	158,967	108,957	70,001	81,827	96,019	53,444	**1,023,791**
	TOTAL	**216,091**	**102,090**	**52,041**	**52,129**	**90,172**	**204,237**	**154,051**	**163,033**	**126,373**	**206,119**	**83,816**	**1,450,151**

APPENDIX 2

RETAILER REQUIREMENTS

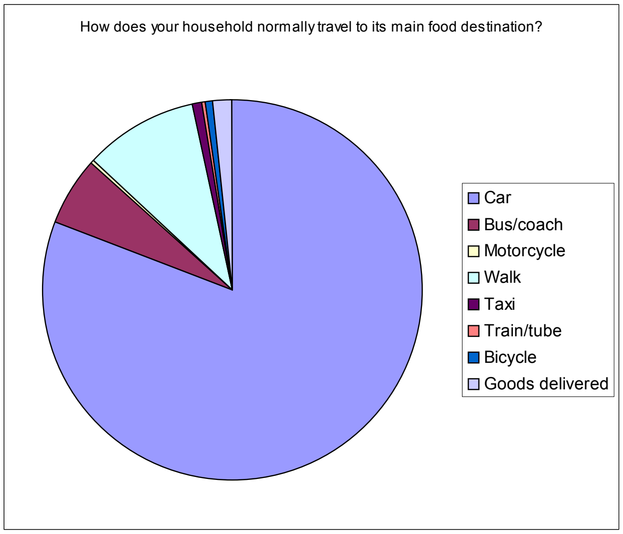
HARLOW TOWN CENTRE RETAILER REQUIREMENTS

	Retailer	Category	Min req.	Max req.
1	99p Stores	Comparison	279	465
2	Ann Summers	Comparison	93	232
3	B&Q	Comparison	9,290	9,290
4	Bathstore	Comparison	232	465
5	Bookworld	Comparison	111	279
6	Floors-2-Go	Comparison	232	557
7	Fopp Records (now in administration)	Comparison	279	929
8	Gamestation	Comparison	111	149
9	Instore	Comparison	93	372
10	Krisp Clothing	Comparison	116	139
11	Machine Mart	Comparison	186	1,394
12	Maplin Electronics	Comparison	372	465
13	Mr Clutch	Comparison	325	465
14	Republic	Comparison	186	279
15	Scope	Comparison	70	465
16	Tile Magic	Comparison	325	650
17	TJ Huges	Comparison	2,323	3,716
			14,622	**20,308**
1	Aldi	Convenience	1,356	1,356
2	Bakers Oven	Convenience	111	232
3	Farmfoods	Convenience	465	743
4	Greggs	Convenience	74	111
			2,007	**2,443**
1	Ember Inns	Leisure	650	650
2	Holiday Inn	Leisure	7,432	11,148
3	Inkeepers Lodge	Leisure	929	929
4	Vintage Inns	Leisure	650	650
			9,662	**13,378**
1	Ask Central	Service	232	465
2	Flight Centre	Service	37	93
3	Harvester	Service	743	743
4	Johnson Cleaners	Service	111	130
5	O'Neills	Service	84	111
6	Optika Group	Service	93	93
7	Pizza Express	Service	232	465
8	Pret a Manger	Service	79	279
9	Wagamama	Service	325	465
10	Wetherspoons	Service	93	1,394
11	Zizzi	Service	279	465
			2,309	**4,701**
36	**TOTAL**		**28,599**	**40,830**

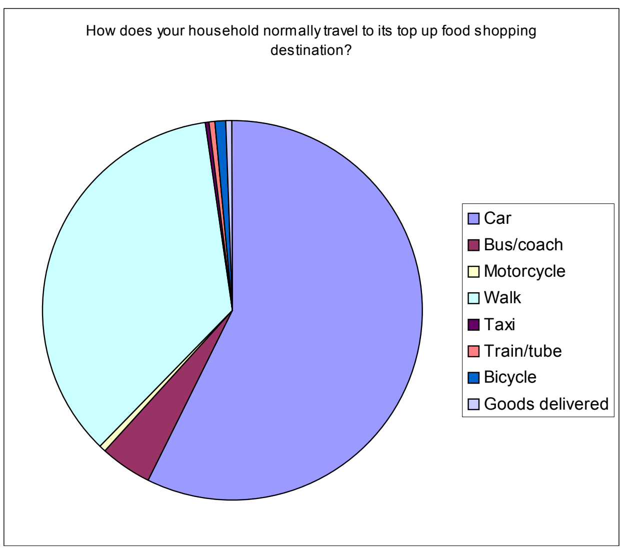
APPENDIX 3

CUSTOMER VIEWS AND BEHAVIOUR

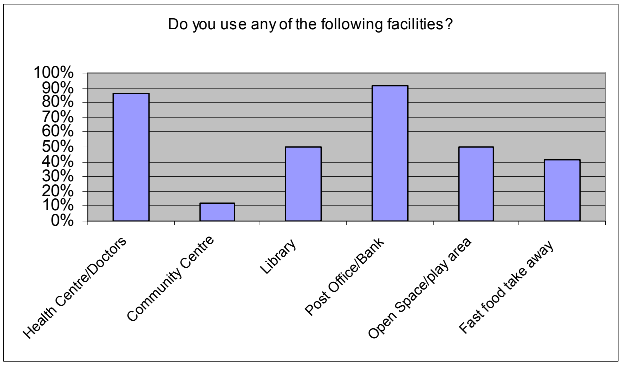
Customer Views and Behaviour



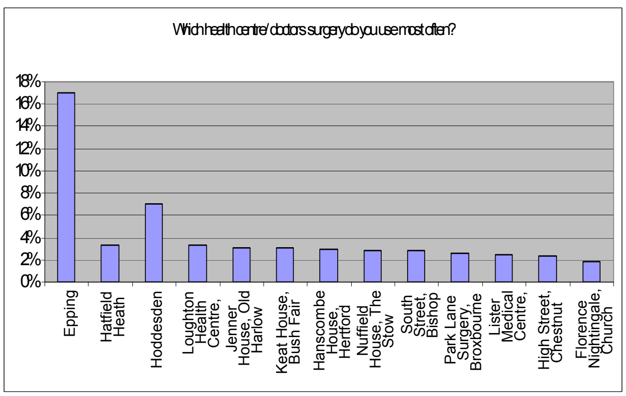
- The vast majority of shoppers (81%) travel to their main food destination by car.
- 10% walk and 6% use the bus.



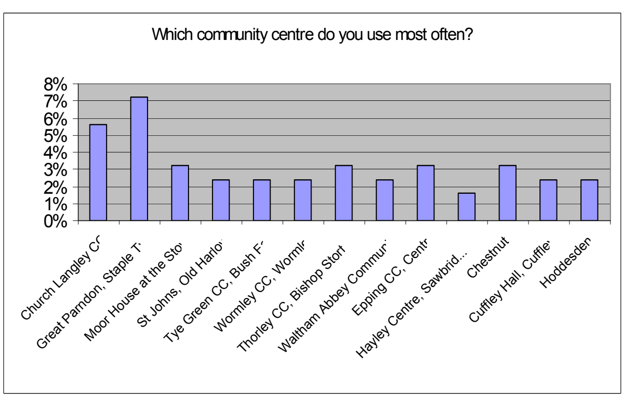
- For top up food shopping 57% use a car and 36% walk.



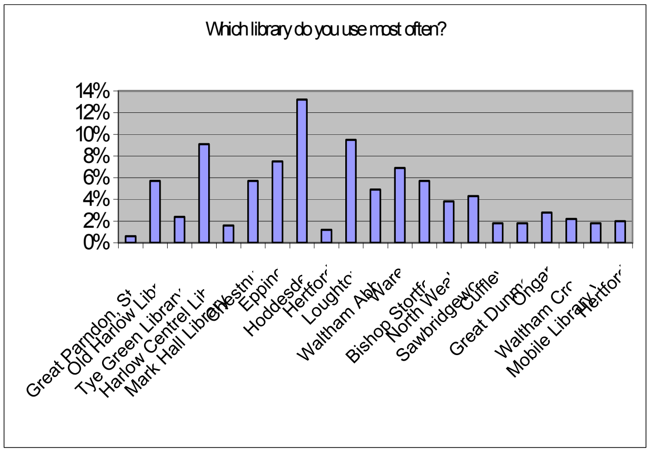
- The vast majority of people use health centres/ doctors surgery's and Post Offices/ banks.
- 50% of respondents use a library
- 41% use fast food takeaways
- 12% use a community centre



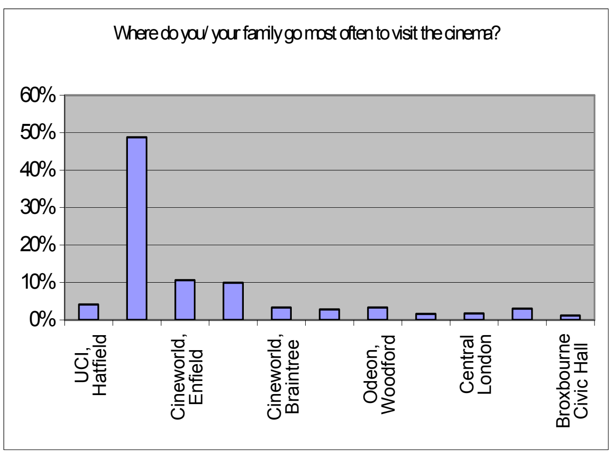
- 17% of respondents travel to use health centres/ doctors surgery's in Epping.
- Other than Epping the responses are split evenly over the survey area.



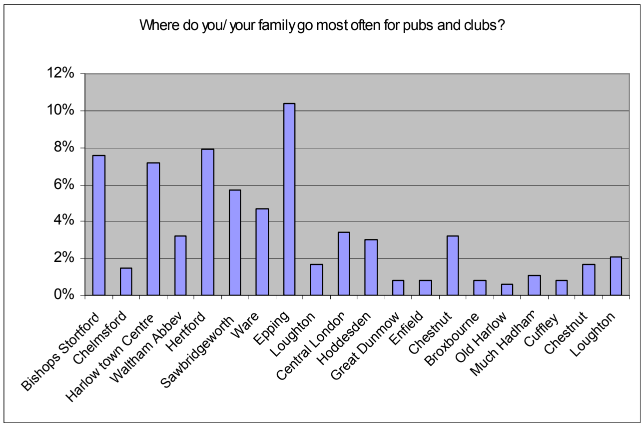
- 7% of respondents use the community centre at Staple Tye with a further 6% using the community centre at Church Langley.
- Other than these responses are split fairly evenly across the whole survey area.



- The highest Reponses in terms of where people visit the library were Hoddesdon and Loughton.
- 9% visit Harlow Central Library and a further 6% Old Harlow Library.



- 49% of respondents visit the out-of-centre Cineworld Cinema at the Queensgate Centre in Harlow.
- Other than that responses are fairly evenly split over the whole survey area.



- The highest responses for where people visit pubs and clubs is Epping at 10%.
- 7% visit Harlow town centre.

- The highest response to where people visit restaurants was Harlow town centre at 10%, the Epping at 9%.

APPENDIX 4

THE STOW IN-CENTRE SURVEY RESULTS

Q02 What is the main purpose of your visit here today?

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
Top-up smaller food shop (e.g. bread, milk, butter, etc..)	21.1%	8	23.1%	3	20.0%	5	12.5%	1	15.4%	2	29.4%	5	7.7%	1	28.0%	7
Post Office	21.1%	8	15.4%	2	24.0%	6	25.0%	2	30.8%	4	11.8%	2	15.4%	2	24.0%	6
Other	15.8%	6	7.7%	1	20.0%	5	12.5%	1	15.4%	2	17.6%	3	15.4%	2	16.0%	4
Other non-food shopping (e.g. electrical, household goods, flowers)	7.9%	3	7.7%	1	8.0%	2	0.0%	0	7.7%	1	11.8%	2	7.7%	1	8.0%	2
Work / business	7.9%	3	15.4%	2	4.0%	1	12.5%	1	7.7%	1	5.9%	1	15.4%	2	4.0%	1
Health Centre	7.9%	3	7.7%	1	8.0%	2	0.0%	0	7.7%	1	11.8%	2	15.4%	2	4.0%	1
Dentist	5.3%	2	7.7%	1	4.0%	1	0.0%	0	7.7%	1	5.9%	1	0.0%	0	8.0%	2
Hairdressers / Beauty Salon / Nail Bar	5.3%	2	0.0%	0	8.0%	2	25.0%	2	0.0%	0	0.0%	0	15.4%	2	0.0%	0
Visiting a Specific shop	5.3%	2	7.7%	1	4.0%	1	0.0%	0	0.0%	0	11.8%	2	0.0%	0	8.0%	2
Launderette / Dry Cleaners	5.3%	2	0.0%	0	8.0%	2	0.0%	0	7.7%	1	5.9%	1	0.0%	0	8.0%	2
Estate Agents	5.3%	2	7.7%	1	4.0%	1	12.5%	1	7.7%	1	0.0%	0	0.0%	0	8.0%	2
Café / Restaurant	5.3%	2	7.7%	1	4.0%	1	0.0%	0	7.7%	1	5.9%	1	7.7%	1	4.0%	1
Meeting a Friend / Socialising	2.6%	1	7.7%	1	0.0%	0	0.0%	0	0.0%	0	5.9%	1	0.0%	0	4.0%	1
Window Shopping	2.6%	1	0.0%	0	4.0%	1	0.0%	0	0.0%	0	5.9%	1	0.0%	0	4.0%	1
Base:		38		13		25		8		13		17		13		25

Q03 How did you travel here today?

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
On foot	47.4%	18	53.8%	7	44.0%	11	37.5%	3	38.5%	5	58.8%	10	46.2%	6	48.0%	12
Driving a car / van	42.1%	16	46.2%	6	40.0%	10	62.5%	5	30.8%	4	41.2%	7	53.8%	7	36.0%	9
Bus, minibus or coach	2.6%	1	0.0%	0	4.0%	1	0.0%	0	7.7%	1	0.0%	0	0.0%	0	4.0%	1
Bicycle	2.6%	1	0.0%	0	4.0%	1	0.0%	0	7.7%	1	0.0%	0	0.0%	0	4.0%	1
Passenger in a car or van	2.6%	1	0.0%	0	4.0%	1	0.0%	0	7.7%	1	0.0%	0	0.0%	0	4.0%	1
Taxi / minicab	2.6%	1	0.0%	0	4.0%	1	0.0%	0	7.7%	1	0.0%	0	0.0%	0	4.0%	1
Base:		38		13		25		8		13		17		13		25

Q04 Where did you park today?

Those who travelled by car, motorcycle or scooter at Q03

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
Car park by the library	47.1%	8	33.3%	2	54.5%	6	40.0%	2	40.0%	2	57.1%	4	42.9%	3	50.0%	5
Stow Car Park	29.4%	5	33.3%	2	27.3%	3	20.0%	1	40.0%	2	28.6%	2	14.3%	1	40.0%	4
Other	23.5%	4	33.3%	2	18.2%	2	40.0%	2	20.0%	1	14.3%	1	42.9%	3	10.0%	1
Base:		17		6		11		5		5		7		7		10

Q05 Where have you travelled from?

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
Home	73.7%	28	69.2%	9	76.0%	19	62.5%	5	69.2%	9	82.4%	14	61.5%	8	80.0%	20
Work	15.8%	6	30.8%	4	8.0%	2	25.0%	2	23.1%	3	5.9%	1	30.8%	4	8.0%	2
Shopping elsewhere	5.3%	2	0.0%	0	8.0%	2	0.0%	0	7.7%	1	5.9%	1	0.0%	0	8.0%	2
Other	5.3%	2	0.0%	0	8.0%	2	12.5%	1	0.0%	0	5.9%	1	7.7%	1	4.0%	1
Base:		38		13		25		8		13		17		13		25

Q06 Approximately how long did your journey take?

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
Less than 5 mins	36.8%	14	38.5%	5	36.0%	9	50.0%	4	23.1%	3	41.2%	7	46.2%	6	32.0%	8
6-10 mins	50.0%	19	30.8%	4	60.0%	15	37.5%	3	61.5%	8	47.1%	8	38.5%	5	56.0%	14
11-15 mins	2.6%	1	7.7%	1	0.0%	0	0.0%	0	0.0%	0	5.9%	1	7.7%	1	0.0%	0
16-20 mins	5.3%	2	7.7%	1	4.0%	1	0.0%	0	7.7%	1	5.9%	1	0.0%	0	8.0%	2
21-30 mins	2.6%	1	7.7%	1	0.0%	0	12.5%	1	0.0%	0	0.0%	0	0.0%	0	4.0%	1
Other	2.6%	1	7.7%	1	0.0%	0	0.0%	0	7.7%	1	0.0%	0	7.7%	1	0.0%	0
Base:		38		13		25		8		13		17		13		25

Column %ges.

Q07 What else, if anything, will you be doing here today as part of your trip?

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
Top-up smaller food shop (e.g. bread, milk, butter, etc.)	13.2%	5	7.7%	1	16.0%	4	25.0%	2	7.7%	1	11.8%	2	15.4%	2	12.0%	3
Post Office	10.5%	4	7.7%	1	12.0%	3	0.0%	0	15.4%	2	11.8%	2	7.7%	1	12.0%	3
Health Centre	2.6%	1	0.0%	0	4.0%	1	0.0%	0	0.0%	0	5.9%	1	7.7%	1	0.0%	0
Visiting a Specific shop	2.6%	1	0.0%	0	4.0%	1	0.0%	0	7.7%	1	0.0%	0	0.0%	0	4.0%	1
Ladies Fashion Shopping (i.e. clothing, footwear)	2.6%	1	0.0%	0	4.0%	1	12.5%	1	0.0%	0	0.0%	0	7.7%	1	0.0%	0
Window Shopping	2.6%	1	0.0%	0	4.0%	1	0.0%	0	7.7%	1	0.0%	0	0.0%	0	4.0%	1
Café / Restaurant	2.6%	1	7.7%	1	0.0%	0	12.5%	1	0.0%	0	0.0%	0	0.0%	0	4.0%	1
(Nothing else)	57.9%	22	69.2%	9	52.0%	13	50.0%	4	61.5%	8	58.8%	10	69.2%	9	52.0%	13
(Don't know)	7.9%	3	7.7%	1	8.0%	2	0.0%	0	7.7%	1	11.8%	2	0.0%	0	12.0%	3
Base:		38		13		25		8		13		17		13		25

Q08 How long do you intend to spend in the centre?

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
Less than 10 mins	28.9%	11	46.2%	6	20.0%	5	37.5%	3	23.1%	3	29.4%	5	38.5%	5	24.0%	6
11-20 mins	36.8%	14	23.1%	3	44.0%	11	25.0%	2	46.2%	6	35.3%	6	15.4%	2	48.0%	12
21-30 mins	13.2%	5	7.7%	1	16.0%	4	25.0%	2	0.0%	0	17.6%	3	7.7%	1	16.0%	4
31-40 mins	5.3%	2	7.7%	1	4.0%	1	0.0%	0	7.7%	1	5.9%	1	15.4%	2	0.0%	0
41-50 mins	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
51-60 mins	5.3%	2	7.7%	1	4.0%	1	0.0%	0	7.7%	1	5.9%	1	7.7%	1	4.0%	1
61-90 mins	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Longer than 90 mins	7.9%	3	7.7%	1	8.0%	2	12.5%	1	7.7%	1	5.9%	1	15.4%	2	4.0%	1
All day	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	2.6%	1	0.0%	0	4.0%	1	0.0%	0	7.7%	1	0.0%	0	0.0%	0	4.0%	1
Base:		38		13		25		8		13		17		13		25

Q09 How often do you visit The Stow?

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
Every day	7.9%	3	7.7%	1	8.0%	2	0.0%	0	15.4%	2	5.9%	1	7.7%	1	8.0%	2
4-5 times a week	23.7%	9	15.4%	2	28.0%	7	0.0%	0	15.4%	2	41.2%	7	7.7%	1	32.0%	8
2-3 times a week	36.8%	14	38.5%	5	36.0%	9	37.5%	3	46.2%	6	29.4%	5	38.5%	5	36.0%	9
Once a week	10.5%	4	15.4%	2	8.0%	2	0.0%	0	7.7%	1	17.6%	3	7.7%	1	12.0%	3
Once a month	13.2%	5	23.1%	3	8.0%	2	37.5%	3	7.7%	1	5.9%	1	30.8%	4	4.0%	1
Once every 2 months	7.9%	3	0.0%	0	12.0%	3	25.0%	2	7.7%	1	0.0%	0	7.7%	1	8.0%	2
Once every 6 months	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a year	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
First time today	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Base:		38		13		25		8		13		17		13		25

Q10 Which three specific shops / facilities do you normally visit when you come to The Stow?

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
One Stop / Post Office	73.7%	28	61.5%	8	80.0%	20	62.5%	5	69.2%	9	82.4%	14	61.5%	8	80.0%	20
Costcutter	36.8%	14	30.8%	4	40.0%	10	12.5%	1	53.8%	7	35.3%	6	23.1%	3	44.0%	11
Boots	26.3%	10	15.4%	2	32.0%	8	50.0%	4	30.8%	4	11.8%	2	30.8%	4	24.0%	6
Health Centre	23.7%	9	23.1%	3	24.0%	6	0.0%	0	15.4%	2	41.2%	7	23.1%	3	24.0%	6
Other	21.1%	8	23.1%	3	20.0%	5	0.0%	0	23.1%	3	29.4%	5	15.4%	2	24.0%	6
Dorringtons Baker	21.1%	8	15.4%	2	24.0%	6	37.5%	3	23.1%	3	11.8%	2	23.1%	3	20.0%	5
Café Delight	13.2%	5	30.8%	4	4.0%	1	25.0%	2	15.4%	2	5.9%	1	15.4%	2	12.0%	3
The Stow Barbers	7.9%	3	7.7%	1	8.0%	2	12.5%	1	0.0%	0	11.8%	2	7.7%	1	8.0%	2
Library	5.3%	2	0.0%	0	8.0%	2	0.0%	0	7.7%	1	5.9%	1	15.4%	2	0.0%	0
Dentist	2.6%	1	7.7%	1	0.0%	0	0.0%	0	7.7%	1	0.0%	0	0.0%	0	4.0%	1
Balloons, Banners and Bows	2.6%	1	0.0%	0	4.0%	1	0.0%	0	7.7%	1	0.0%	0	0.0%	0	4.0%	1
Skin & Tonic	2.6%	1	0.0%	0	4.0%	1	12.5%	1	0.0%	0	0.0%	0	7.7%	1	0.0%	0
Dry Cleaners	2.6%	1	0.0%	0	4.0%	1	0.0%	0	7.7%	1	0.0%	0	0.0%	0	4.0%	1
Base:		38		13		25		8		13		17		13		25

Q11 Where do you normally shop for most of your households main food shopping?

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
Sainsburys - Fifth Avenue Harlow Out Of Centre	26.3%	10	23.1%	3	28.0%	7	12.5%	1	23.1%	3	35.3%	6	30.8%	4	24.0%	6
Tesco – East Road, Harlow Out Of Centre	21.1%	8	0.0%	0	32.0%	8	25.0%	2	23.1%	3	17.6%	3	15.4%	2	24.0%	6
Tesco, Harlow Town Centre, The Harvey Centre	18.4%	7	23.1%	3	16.0%	4	12.5%	1	15.4%	2	23.5%	4	15.4%	2	20.0%	5
Asda, Harlow Town Centre, The Water Gardens	10.5%	4	0.0%	0	16.0%	4	0.0%	0	23.1%	3	5.9%	1	0.0%	0	16.0%	4
Tesco - Church Langley, Harlow	7.9%	3	15.4%	2	4.0%	1	25.0%	2	0.0%	0	5.9%	1	15.4%	2	4.0%	1
Any Foodstores, Hertford	5.3%	2	15.4%	2	0.0%	0	12.5%	1	7.7%	1	0.0%	0	7.7%	1	4.0%	1
Any Foodstores, Bishop Stortford	2.6%	1	0.0%	0	4.0%	1	0.0%	0	0.0%	0	5.9%	1	7.7%	1	0.0%	0
Lidl, Staple Tye, Harlow	2.6%	1	7.7%	1	0.0%	0	0.0%	0	0.0%	0	5.9%	1	0.0%	0	4.0%	1
Any Foodstores, Sawbridgeworth	2.6%	1	7.7%	1	0.0%	0	0.0%	0	7.7%	1	0.0%	0	7.7%	1	0.0%	0
(Don't know / Varies)	2.6%	1	7.7%	1	0.0%	0	12.5%	1	0.0%	0	0.0%	0	0.0%	0	4.0%	1
Base:		38		13		25		8		13		17		13		25

Q12 Where do you normally shop for most of your households small scale / top up food shopping?

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
Other Food Stores, The Stow, Harlow	31.6%	12	23.1%	3	36.0%	9	12.5%	1	23.1%	3	47.1%	8	30.8%	4	32.0%	8
Costcutter, The Stow, Harlow	13.2%	5	30.8%	4	4.0%	1	12.5%	1	15.4%	2	11.8%	2	15.4%	2	12.0%	3
Tesco, Harlow Town Centre, The Harvey Centre	10.5%	4	7.7%	1	12.0%	3	12.5%	1	7.7%	1	11.8%	2	0.0%	0	16.0%	4
Sainsburys - Fifth Avenue Harlow Out Of Centre	7.9%	3	0.0%	0	12.0%	3	0.0%	0	15.4%	2	5.9%	1	7.7%	1	8.0%	2
Tesco – East Road, Harlow Out Of Centre	5.3%	2	0.0%	0	8.0%	2	0.0%	0	0.0%	0	11.8%	2	7.7%	1	4.0%	1
Other	5.3%	2	0.0%	0	8.0%	2	0.0%	0	7.7%	1	5.9%	1	7.7%	1	4.0%	1
Colt, Colt (Hobtoe Road/Spring Hills) (Pub: The Shark), Harlow	2.6%	1	0.0%	0	4.0%	1	12.5%	1	0.0%	0	0.0%	0	7.7%	1	0.0%	0
Alldays Co-Op, Tumbler Road, Harlow	2.6%	1	7.7%	1	0.0%	0	12.5%	1	0.0%	0	0.0%	0	7.7%	1	0.0%	0
Tesco - Church Langley, Harlow	2.6%	1	0.0%	0	4.0%	1	0.0%	0	7.7%	1	0.0%	0	0.0%	0	4.0%	1
One Stop, The Stow, Harlow	2.6%	1	0.0%	0	4.0%	1	0.0%	0	7.7%	1	0.0%	0	0.0%	0	4.0%	1
Any Foodstores, Sawbridgeworth	2.6%	1	7.7%	1	0.0%	0	0.0%	0	7.7%	1	0.0%	0	7.7%	1	0.0%	0
Other Food Stores, Staple Tye, Harlow	2.6%	1	0.0%	0	4.0%	1	0.0%	0	0.0%	0	5.9%	1	0.0%	0	4.0%	1
(Don't know / Varies)	10.5%	4	23.1%	3	4.0%	1	37.5%	3	7.7%	1	0.0%	0	7.7%	1	12.0%	3
Base:		38		13		25		8		13		17		13		25

Q13 Do you shop anywhere else for your main food shopping?

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
Tesco, Harlow Town Centre, The Harvey Centre	7.9%	3	0.0%	0	12.0%	3	0.0%	0	7.7%	1	11.8%	2	7.7%	1	8.0%	2
Sainsburys - Fifth Avenue Harlow Out Of Centre	5.3%	2	7.7%	1	4.0%	1	0.0%	0	7.7%	1	5.9%	1	0.0%	0	8.0%	2
Iceland, Harlow Town Centre, The Harvey Centre	2.6%	1	0.0%	0	4.0%	1	0.0%	0	7.7%	1	0.0%	0	0.0%	0	4.0%	1
Tesco - Church Langley, Harlow	2.6%	1	0.0%	0	4.0%	1	0.0%	0	0.0%	0	5.9%	1	7.7%	1	0.0%	0
(Don’t shop anywhere else)	71.1%	27	69.2%	9	72.0%	18	62.5%	5	69.2%	9	76.5%	13	76.9%	10	68.0%	17
(Don't know / Varies)	10.5%	4	23.1%	3	4.0%	1	37.5%	3	7.7%	1	0.0%	0	7.7%	1	12.0%	3
Base:		38		13		25		8		13		17		13		25

Q14 Do you shop anywhere else for your top up food shopping?

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
Other Food Stores, The Stow, Harlow	5.3%	2	0.0%	0	8.0%	2	0.0%	0	15.4%	2	0.0%	0	7.7%	1	4.0%	1
Sainsburys - Fifth Avenue Harlow Out Of Centre	5.3%	2	7.7%	1	4.0%	1	0.0%	0	0.0%	0	11.8%	2	0.0%	0	8.0%	2
Tesco, Harlow Town Centre, The Harvey Centre	2.6%	1	0.0%	0	4.0%	1	0.0%	0	7.7%	1	0.0%	0	0.0%	0	4.0%	1
(Don't shop anywhere else)	76.3%	29	69.2%	9	80.0%	20	62.5%	5	69.2%	9	88.2%	15	84.6%	11	72.0%	18
(Don't know / Varies)	10.5%	4	23.1%	3	4.0%	1	37.5%	3	7.7%	1	0.0%	0	7.7%	1	12.0%	3
Base:		38		13		25		8		13		17		13		25

Q15 What do you like most about The Stow?

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
Convenient / Close to Home	57.9%	22	53.8%	7	60.0%	15	50.0%	4	53.8%	7	64.7%	11	53.8%	7	60.0%	15
Health Centre	10.5%	4	7.7%	1	12.0%	3	0.0%	0	15.4%	2	11.8%	2	15.4%	2	8.0%	2
Other	7.9%	3	15.4%	2	4.0%	1	12.5%	1	15.4%	2	0.0%	0	15.4%	2	4.0%	1
Convenient / Close to Work	5.3%	2	7.7%	1	4.0%	1	12.5%	1	0.0%	0	5.9%	1	15.4%	2	0.0%	0
A particular retailer	5.3%	2	7.7%	1	4.0%	1	12.5%	1	0.0%	0	5.9%	1	15.4%	2	0.0%	0
A particular facility	2.6%	1	0.0%	0	4.0%	1	12.5%	1	0.0%	0	0.0%	0	7.7%	1	0.0%	0
Convenient / Other	2.6%	1	0.0%	0	4.0%	1	12.5%	1	0.0%	0	0.0%	0	7.7%	1	0.0%	0
Good choice of convenience stores	2.6%	1	0.0%	0	4.0%	1	0.0%	0	7.7%	1	0.0%	0	0.0%	0	4.0%	1
(Nothing / Don't Know)	28.9%	11	30.8%	4	28.0%	7	25.0%	2	30.8%	4	29.4%	5	15.4%	2	36.0%	9
Base:		38		13		25		8		13		17		13		25

Q16 What do you dislike about The Stow?

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
Other	34.2%	13	30.8%	4	36.0%	9	50.0%	4	38.5%	5	23.5%	4	38.5%	5	32.0%	8
Poor environment	18.4%	7	0.0%	0	28.0%	7	12.5%	1	23.1%	3	17.6%	3	23.1%	3	16.0%	4
Litter / Graffiti	13.2%	5	30.8%	4	4.0%	1	25.0%	2	7.7%	1	11.8%	2	30.8%	4	4.0%	1
Not enough parking	10.5%	4	15.4%	2	8.0%	2	25.0%	2	0.0%	0	11.8%	2	15.4%	2	8.0%	2
Too empty / no atmosphere	7.9%	3	7.7%	1	8.0%	2	12.5%	1	15.4%	2	0.0%	0	7.7%	1	8.0%	2
Lack of atmosphere	5.3%	2	7.7%	1	4.0%	1	0.0%	0	0.0%	0	11.8%	2	15.4%	2	0.0%	0
Crime / Vandalism	2.6%	1	7.7%	1	0.0%	0	0.0%	0	7.7%	1	0.0%	0	7.7%	1	0.0%	0
No major food store (e.g. Tesco, Asda, Sainsbury, Morrisons, Waitrose)	2.6%	1	0.0%	0	4.0%	1	0.0%	0	7.7%	1	0.0%	0	0.0%	0	4.0%	1
(Nothing / Don't know)	44.7%	17	46.2%	6	44.0%	11	25.0%	2	38.5%	5	58.8%	10	30.8%	4	52.0%	13
Base:		38		13		25		8		13		17		13		25

Q17 What improvements to The Stow would make you visit more often than you currently do?

1st mention

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
Improve range of independent / specialist shops	23.7%	9	30.8%	4	20.0%	5	25.0%	2	15.4%	2	29.4%	5	38.5%	5	16.0%	4
Other	18.4%	7	15.4%	2	20.0%	5	12.5%	1	23.1%	3	17.6%	3	15.4%	2	20.0%	5
More parking spaces - type unspecified	13.2%	5	15.4%	2	12.0%	3	37.5%	3	7.7%	1	5.9%	1	23.1%	3	8.0%	2
Attract a specific retailer	5.3%	2	0.0%	0	8.0%	2	0.0%	0	7.7%	1	5.9%	1	0.0%	0	8.0%	2
Attract larger food retailers (eg Sainsbury, Morrisons, Waitrose, Tesco)	2.6%	1	7.7%	1	0.0%	0	0.0%	0	7.7%	1	0.0%	0	7.7%	1	0.0%	0
(Don't know)	28.9%	11	23.1%	3	32.0%	8	12.5%	1	23.1%	3	41.2%	7	7.7%	1	40.0%	10
(Nothing)	7.9%	3	7.7%	1	8.0%	2	12.5%	1	15.4%	2	0.0%	0	7.7%	1	8.0%	2
Base:		38		13		25		8		13		17		13		25

2nd mention

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
Attract more people / make more lively	7.9%	3	7.7%	1	8.0%	2	25.0%	2	7.7%	1	0.0%	0	7.7%	1	8.0%	2
Attract larger food retailers (eg Sainsbury, Morrisons, Waitrose, Tesco)	7.9%	3	7.7%	1	8.0%	2	12.5%	1	7.7%	1	5.9%	1	7.7%	1	8.0%	2
Improve policing / other security measures	7.9%	3	7.7%	1	8.0%	2	12.5%	1	0.0%	0	11.8%	2	15.4%	2	4.0%	1
Other	7.9%	3	7.7%	1	8.0%	2	25.0%	2	7.7%	1	0.0%	0	15.4%	2	4.0%	1
Improve range of independent / specialist shops	2.6%	1	7.7%	1	0.0%	0	0.0%	0	7.7%	1	0.0%	0	7.7%	1	0.0%	0
Cleaner shopping streets	2.6%	1	7.7%	1	0.0%	0	0.0%	0	0.0%	0	5.9%	1	0.0%	0	4.0%	1
Create more open spaces	2.6%	1	0.0%	0	4.0%	1	0.0%	0	0.0%	0	5.9%	1	7.7%	1	0.0%	0
(Don't know)	44.7%	17	38.5%	5	48.0%	12	12.5%	1	38.5%	5	64.7%	11	23.1%	3	56.0%	14
(Nothing)	15.8%	6	15.4%	2	16.0%	4	12.5%	1	30.8%	4	5.9%	1	15.4%	2	16.0%	4
Base:		38		13		25		8		13		17		13		25

3rd mention

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
More cafes/ restaurants	2.6%	1	7.7%	1	0.0%	0	12.5%	1	0.0%	0	0.0%	0	0.0%	0	4.0%	1
Attract larger food retailers (eg Sainsbury, Morrisons, Waitrose, Tesco)	2.6%	1	0.0%	0	4.0%	1	0.0%	0	0.0%	0	5.9%	1	7.7%	1	0.0%	0
Attract larger fashion retailers	2.6%	1	7.7%	1	0.0%	0	0.0%	0	7.7%	1	0.0%	0	7.7%	1	0.0%	0
(Don't know)	73.7%	28	61.5%	8	80.0%	20	75.0%	6	61.5%	8	82.4%	14	69.2%	9	76.0%	19
(Nothing)	18.4%	7	23.1%	3	16.0%	4	12.5%	1	30.8%	4	11.8%	2	15.4%	2	20.0%	5
Base:		38		13		25		8		13		17		13		25

SEX Sex:

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
Male	34.2%	13	100.0%	13	0.0%	0	50.0%	4	23.1%	3	35.3%	6	38.5%	5	32.0%	8
Female	65.8%	25	0.0%	0	100.0%	25	50.0%	4	76.9%	10	64.7%	11	61.5%	8	68.0%	17
Base:		38		13		25		8		13		17		13		25

AGE Age Group:

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
18 – 24 years	5.3%	2	7.7%	1	4.0%	1	25.0%	2	0.0%	0	0.0%	0	0.0%	0	8.0%	2
25 – 34 years	15.8%	6	23.1%	3	12.0%	3	75.0%	6	0.0%	0	0.0%	0	38.5%	5	4.0%	1
35 – 44 years	23.7%	9	15.4%	2	28.0%	7	0.0%	0	69.2%	9	0.0%	0	15.4%	2	28.0%	7
45 – 54 years	10.5%	4	7.7%	1	12.0%	3	0.0%	0	30.8%	4	0.0%	0	15.4%	2	8.0%	2
55 – 64 years	15.8%	6	7.7%	1	20.0%	5	0.0%	0	0.0%	0	35.3%	6	30.8%	4	8.0%	2
65+ years	28.9%	11	38.5%	5	24.0%	6	0.0%	0	0.0%	0	64.7%	11	0.0%	0	44.0%	11
Base:		38		13		25		8		13		17		13		25

SEG Socio-economic group

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
AB	2.6%	1	7.7%	1	0.0%	0	0.0%	0	7.7%	1	0.0%	0	7.7%	1	0.0%	0
C1	31.6%	12	30.8%	4	32.0%	8	62.5%	5	23.1%	3	23.5%	4	92.3%	12	0.0%	0
C2	18.4%	7	15.4%	2	20.0%	5	12.5%	1	30.8%	4	11.8%	2	0.0%	0	28.0%	7
DE	47.4%	18	46.2%	6	48.0%	12	25.0%	2	38.5%	5	64.7%	11	0.0%	0	72.0%	18
Base:		38		13		25		8		13		17		13		25

CAR Cars in household

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
None	31.6%	12	30.8%	4	32.0%	8	12.5%	1	23.1%	3	47.1%	8	7.7%	1	44.0%	11
One	42.1%	16	38.5%	5	44.0%	11	37.5%	3	46.2%	6	41.2%	7	23.1%	3	52.0%	13
Two	18.4%	7	23.1%	3	16.0%	4	25.0%	2	30.8%	4	5.9%	1	46.2%	6	4.0%	1
Three	5.3%	2	7.7%	1	4.0%	1	25.0%	2	0.0%	0	0.0%	0	15.4%	2	0.0%	0
More than three	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	2.6%	1	0.0%	0	4.0%	1	0.0%	0	0.0%	0	5.9%	1	7.7%	1	0.0%	0
Base:		38		13		25		8		13		17		13		25

Column %ges.

PC Postcode

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE	
CM17 0	2.6%	1	0.0%	0	4.0%	1	0.0%	0	7.7%	1	0.0%	0	0.0%	0	4.0%	1
CM17 9	2.6%	1	7.7%	1	0.0%	0	12.5%	1	0.0%	0	0.0%	0	7.7%	1	0.0%	0
CM18 6	2.6%	1	7.7%	1	0.0%	0	12.5%	1	0.0%	0	0.0%	0	7.7%	1	0.0%	0
CM19 5	2.6%	1	0.0%	0	4.0%	1	0.0%	0	0.0%	0	5.9%	1	7.7%	1	0.0%	0
CM19 7	2.6%	1	7.7%	1	0.0%	0	0.0%	0	0.0%	0	5.9%	1	0.0%	0	4.0%	1
CM20 1	2.6%	1	0.0%	0	4.0%	1	12.5%	1	0.0%	0	0.0%	0	7.7%	1	0.0%	0
CM20 2	13.2%	5	15.4%	2	12.0%	3	12.5%	1	7.7%	1	17.6%	3	15.4%	2	12.0%	3
CM20 3	63.2%	24	46.2%	6	72.0%	18	37.5%	3	76.9%	10	64.7%	11	38.5%	5	76.0%	19
CM21 9	2.6%	1	7.7%	1	0.0%	0	0.0%	0	7.7%	1	0.0%	0	7.7%	1	0.0%	0
CM23 2	2.6%	1	0.0%	0	4.0%	1	0.0%	0	0.0%	0	5.9%	1	7.7%	1	0.0%	0
EN1 4	2.6%	1	7.7%	1	0.0%	0	12.5%	1	0.0%	0	0.0%	0	0.0%	0	4.0%	1
Base:		38		13		25		8		13		17		13		25

Column %ges.

APPENDIX 5

CAPACITY PROJECTIONS: CONVENIENCE GOODS

Convenience Goods Capacity Assessment

Harlow Retail Study

TABLE 1

SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	POPULATION 2007	2011	2016	2021
1	CM18 6, CM18 7, CM19 4, CM19 5, CM20 1, CM20 2, CM20 3	64,363	64,949	65,921	66,760
2	CM17 0, CM17 9, CM21 0, CM21 9	30,463	30,905	31,524	32,106
3	CM16 5, CM16 6, EN9 2	15,509	15,759	16,151	16,499
4	CM16 4, CM16 7, RM4 1	15,537	15,791	16,192	16,546
5	IG10 1, IG 10 2, IG10 3	26,868	27,272	27,903	28,464
6	EN80, EN8 7, EN8 9, EN9 1, EN9 3, EN10 6, EN10 7	61,037	62,546	64,484	66,393
7	AL9 6, EN6 4, EN7 5, EN7 6, EN8 8, SG13 8	46,053	47,283	48,836	50,380
8	SG11 1, SG12 0, SG12 9, SG13 7, SG14 1, SG14 2, SG14 3	48,766	49,917	51,430	52,902
9	EN11 0, EN11 8, EN11 9, SG10 6, SG12 7, SG12 8	37,810	38,852	40,191	41,510
10	CB11 4, CM22 6, CM23 1, CM23 2, CM23 3, CM23 4, CM23 5, CM24 1, CM24 8	61,554	62,773	64,443	66,031
11	S11 2, CM50, CM59, CM61, CM227	24,988	25,429	26,086	26,684
TOTAL		**432,948**	**441,476**	**453,161**	**464,275**

Source: Mapinfo Area Profile Report

TABLE 1A

POPULATION GROWTH RATES

GROWTH RATES 2007-2011 (%)	2006-2016 (%)	2006-2021 (%)
0.9	2.4	3.7
1.5	3.5	5.4
1.6	4.1	6.4
1.6	4.2	6.5
1.5	3.9	5.9
2.5	5.6	8.8
2.7	6.0	9.4
2.4	5.5	8.5
2.8	6.3	9.8
2.0	4.7	7.3
1.8	4.4	6.8
2.0	**4.7**	**7.2**

Harlow District - 2007 Retail Study

TABLE 2 (a)

PER CAPITA RETAIL EXPENDITURE			
Convenience Goods:		Comparison Goods:	
2004	2004 with SFT removed 1.7%	2004	2004 with SFT removed 5.8%
£1,697	£1,668	£3,378	£3,182

Source: Mapinfo Expenditure Explanatory Volume 2004, Table 2 (p.12).

SOURCE: 2004 Expenditure Per Capita Estimates derived from Mapinfo Area Profile Report.

TABLE 2 (b)

ACTUAL AND PROJECTED GROWTH IN PER CAPITA RETAIL EXPENDITURE (% per annum):		
	Convenience Goods:	Comparison Goods:
2004 - 2005 [1]	0.1%	2.9%
2005 - 2021 [2]	0.9%	4.8%

SOURCE: Mapinfo Information Brief 06/02 (September 2006) - [1] Table 1 for actual growth; and [2] Table 2 for forecast growth 2005 - 2016

TABLE 2 (c)

SURVEY AREA (Zones 1 - 11): RETAIL EXPENDITURE PROJECTIONS (£ per capita in 2004 prices)	2004	2005	2006	2007	2011	2016	2021
Convenience Goods	1,668	1,670	1,685	1,700	1,762	1,843	1,927
Comparison Goods	3,182	3,274	3,432	3,596	4,338	5,484	6,933

Source: Tables 2a and 2b

Harlow District - 2007 Retail Study

TABLE 3

SURVEY AREA (Zones 1 - 11): TOTAL AVAILABLE EXPENDITURE PROJECTIONS (£000'S in 2004 prices)								
	CONVENIENCE GOODS				COMPARISON GOODS			
ZONE	2007	2011	2016	2021	2007	2011	2016	2021
1	109,418	114,443	121,478	128,660	231,465	281,751	361,513	462,831
2	51,787	54,456	58,092	61,875	109,552	134,067	172,879	222,583
3	26,365	27,768	29,763	31,797	55,774	68,363	88,573	114,384
4	26,413	27,824	29,838	31,888	55,875	68,502	88,797	114,710
5	45,676	48,054	51,419	54,856	96,624	118,307	153,021	197,334
6	103,764	110,209	118,829	127,953	219,504	271,327	353,632	460,287
7	78,291	83,315	89,994	97,093	165,618	205,116	267,818	349,273
8	82,903	87,956	94,774	101,953	175,374	216,542	282,044	366,757
9	64,277	68,459	74,063	79,998	135,974	168,542	220,409	287,779
10	104,642	110,609	118,754	127,255	221,363	272,312	353,408	457,777
11	42,480	44,807	48,071	51,426	89,863	110,312	143,056	184,994
TOTAL	**736,016**	**777,900**	**835,074**	**894,753**	**1,556,984**	**1,915,141**	**2,485,150**	**3,218,709**

HARLOW RETAIL STUDY

HARLOW TOWN CENTRE - CONVENIENCE GOODS FLOORSPACE

TABLE 4

CONVENIENCE GOODS ALLOCATION: % MARKET SHARE DERIVED FROM HOUSEHOLD SURVEY RESULTS

Catchment Zone	ASDA, THE WATER GARDENS				TESCO, THE HARVEY CENTRE				MARKS & SPENCER, BROAD WALK				TOTAL			
	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2007 (%)	2011 (%)	2016 (%)	2021 (%)
1	13.0	13.0	13.0	13.0	7.1	7.1	7.1	7.1	0.9	0.9	0.9	0.9	21.0	21.0	21.0	21.0
2	2.1	2.1	2.1	2.1	1.1	1.1	1.1	1.1	1.2	1.2	1.2	1.2	4.4	4.4	4.4	4.4
3	2.4	2.4	2.4	2.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.4	2.4	2.4	2.4
4	0.8	0.8	0.8	0.8	0.0	0.0	0.0	0.0	0.4	0.4	0.4	0.4	1.2	1.2	1.2	1.2
5	0.4	0.4	0.4	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.4	0.4	0.4
6	2.1	2.1	2.1	2.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.1	2.1	2.1	2.1
7	0.0	0.0	0.0	0.0	1.7	1.7	1.7	1.7	0.0	0.0	0.0	0.0	1.7	1.7	1.7	1.7
8	0.0	0.0	0.0	0.0	0.8	0.8	0.8	0.8	0.0	0.0	0.0	0.0	0.8	0.8	0.8	0.8
9	0.0	0.0	0.0	0.0	1.7	1.7	1.7	1.7	0.0	0.0	0.0	0.0	1.7	1.7	1.7	1.7
10	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
11	2.0	2.0	2.0	2.0	0.8	0.8	0.8	0.8	0.0	0.0	0.0	0.0	2.8	2.8	2.8	2.8

Note: These market shares are a 75:25 split between main food and top up food market shares and are derived from the Household Telephone Survey

TABLE 5

CONVENIENCE GOODS ALLOCATION - SPEND (£'000s) in 2004 PRICES

Catchment Zone	ASDA, THE WATER GARDENS				TESCO, THE HARVEY CENTRE				MARKS & SPENCER, BROAD WALK				TOTAL			
	2007 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2007 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2007 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2007 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	14,252	14,906	15,822	16,758	7,796	8,154	8,655	9,167	930	973	1,033	1,094	22,978	24,033	25,510	27,019
2	1,088	1,144	1,220	1,299	544	572	610	650	621	653	697	742	2,253	2,369	2,527	2,692
3	626	659	707	755	0	0	0	0	0	0	0	0	626	659	707	755
4	218	230	246	263	0	0	0	0	92	97	104	112	310	327	351	375
5	160	168	180	192	0	0	0	0	0	0	0	0	160	168	180	192
6	2,153	2,287	2,466	2,655	0	0	0	0	0	0	0	0	2,153	2,287	2,466	2,655
7	0	0	0	0	1,351	1,437	1,552	1,675	0	0	0	0	1,351	1,437	1,552	1,675
8	0	0	0	0	684	726	782	841	0	0	0	0	684	726	782	841
9	0	0	0	0	1,109	1,181	1,278	1,380	0	0	0	0	1,109	1,181	1,278	1,380
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	839	885	949	1,016	350	370	397	424	0	0	0	0	1,189	1,255	1,346	1,440
TOTALS	**19,335**	**20,279**	**21,590**	**22,938**	**11,833**	**12,439**	**13,274**	**14,137**	**1,644**	**1,724**	**1,834**	**1,948**	**32,813**	**34,442**	**36,698**	**39,023**

SOURCE: Tables 2 & 3

HARLOW RETAIL STUDY

NEIGHBOURHOOD CENTRES - CONVENIENCE GOODS FLOORSPACE

TABLE 6

CONVENIENCE GOODS ALLOCATION: % MARKET SHARE DERIVED FROM HOUSEHOLD SURVEY RESULTS

	CHURCH LANGLEY				OLD HARLOW				STAPLE TYE				BUSH FAIR				THE STOW				TOTAL			
Catchment Zone	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	14.9	14.9	14.9	14.9	0.9	0.9	0.9	0.9	0.8	0.8	0.8	0.8	1.9	1.9	1.9	1.9	0.3	0.3	0.3	0.3	18.7	18.7	18.7	18.7
2	34.2	34.2	34.2	34.2	2.3	2.3	2.3	2.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	36.5	36.5	36.5	36.5
3	6.3	6.3	6.3	6.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.3	6.3	6.3	6.3
4	2.6	2.6	2.6	2.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.6	2.6	2.6	2.6
5	1.2	1.2	1.2	1.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2	1.2	1.2	1.2
6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7	1.7	1.7	1.7	1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.7	1.7	1.7	1.7
8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9	3.4	3.4	3.4	3.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.4	3.4	3.4	3.4
10	1.7	1.7	1.7	1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.7	1.7	1.7	1.7
11	5.4	5.4	5.4	5.4	0.3	0.3	0.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.8	5.8	5.8	5.8

Note: These market shares are a 75:25 split between main food and top up food market shares and are derived from the Household Telephone Survey

TABLE 7

CONVENIENCE GOODS ALLOCATION - SPEND (£'000s) in 2004 PRICES

	CHURCH LANGLEY				OLD HARLOW				STAPLE TYE				BUSH FAIR				THE STOW				TOTAL			
Catchment Zone	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	16,303	17,052	18,100	19,170	930	973	1,033	1,094	903	944	1,002	1,061	2,052	2,146	2,278	2,412	637	775	994	1,273	20,824	21,890	23,407	25,011
2	17,724	18,638	19,882	21,177	1,165	1,225	1,307	1,392	0	0	0	0	0	0	0	0	0	0	0	0	18,889	19,863	21,189	22,569
3	1,654	1,742	1,868	1,995	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1,654	1,742	1,868	1,995
4	674	710	761	813	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	674	710	761	813
5	537	565	604	645	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	537	565	604	645
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	1,292	1,375	1,485	1,602	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1,292	1,375	1,485	1,602
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	2,169	2,310	2,500	2,700	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2,169	2,310	2,500	2,700
10	1,727	1,825	1,959	2,100	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1,727	1,825	1,959	2,100
11	2,305	2,431	2,608	2,790	138	146	156	167	0	0	0	0	0	0	0	0	0	0	0	0	2,443	2,576	2,764	2,957
TOTALS	**44,384**	**46,647**	**49,766**	**52,992**	**2,233**	**2,344**	**2,496**	**2,653**	**903**	**944**	**1,002**	**1,061**	**2,052**	**2,146**	**2,278**	**2,412**	**637**	**775**	**994**	**1,273**	**50,209**	**52,856**	**56,536**	**60,391**

SOURCE: Table 2 & 5

HARLOW RETAIL STUDY

OUT OF CENTRE - CONVENIENCE GOODS FLOORSPACE

TABLE 8
CONVENIENCE GOODS ALLOCATION: % MARKET SHARE DERIVED FROM HOUSEHOLD SURVEY RESULTS

	TESCO, EDINBURGH WAY				SAINSBURYS, ALLENDALE WAY				TOTAL			
Catchment Zone	**2006**	**2011**	**2016**	**2021**	**2006**	**2011**	**2016**	**2021**	**2006**	**2011**	**2016**	**2021**
	(%)	**(%)**	**(%)**	**(%)**	**(%)**	**(%)**	**(%)**	**(%)**	**(%)**	**(%)**	**(%)**	**(%)**
1	20.8	20.8	20.8	20.8	27.6	27.6	27.6	27.6	48.4	48.4	48.4	48.4
2	20.6	20.6	20.6	20.6	12.2	12.2	12.2	12.2	32.8	32.8	32.8	32.8
3	0.0	0.0	0.0	0.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
4	0.0	0.0	0.0	0.0	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8
5	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	1.7	1.7	1.7	1.7
6	0.0	0.0	0.0	0.0	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1
7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9	3.2	3.2	3.2	3.2	2.1	2.1	2.1	2.1	5.3	5.3	5.3	5.3
10	0.8	0.8	0.8	0.8	2.8	2.8	2.8	2.8	3.7	3.7	3.7	3.7
11	0.8	0.8	0.8	0.8	2.8	2.8	2.8	2.8	3.7	3.7	3.7	3.7

Note: These market shares are a 75:25 split between main food and top up food market shares and are derived from the Household Telephone Survey

TABLE 9
CONVENIENCE GOODS ALLOCATION - SPEND (£'000s) in 2004 PRICES

	TESCO, EDINBURGH WAY				SAINSBURYS, ALLENDALE WAY				TOTAL			
Catchment Zone	**2006**	**2011**	**2016**	**2021**	**2006**	**2011**	**2016**	**2021**	**2006**	**2011**	**2016**	**2021**
	(£000)	**(£000)**	**(£000)**	**(£000)**	**(£000)**	**(£000)**	**(£000)**	**(£000)**	**(£000)**	**(£000)**	**(£000)**	**(£000)**
1	22,759	23,804	25,267	26,761	30,145	31,529	33,467	35,446	52,904	55,333	58,734	62,207
2	10,668	11,218	11,967	12,746	6,331	6,657	7,102	7,564	16,999	17,875	19,069	20,310
3	0	0	0	0	527	555	595	636	527	555	595	636
4	0	0	0	0	218	230	246	263	218	230	246	263
5	377	396	424	453	377	396	424	453	754	793	848	905
6	0	0	0	0	2,153	2,287	2,466	2,655	2,153	2,287	2,466	2,655
7	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0
9	2,057	2,191	2,370	2,560	1,318	1,403	1,518	1,640	3,375	3,594	3,888	4,200
10	863	913	980	1,050	2,956	3,125	3,355	3,595	3,819	4,037	4,335	4,645
11	350	370	397	424	1,200	1,266	1,358	1,453	1,551	1,635	1,755	1,877
TOTALS	**37,075**	**38,891**	**41,405**	**43,994**	**45,225**	**47,448**	**50,531**	**53,704**	**82,299**	**86,340**	**91,936**	**97,699**

SOURCE: Tables 2 & 7

TABLE 10

CONVENIENCE GOODS FLOORSPACE AND COMPANY AVERAGE TURNOVER ESTIMATES (2007)

	Total Sales Area (sqm)	Convenience Floorspace as a % of Total Sales Area (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Estimated Turnover (£000s)
HARLOW TOWN CENTRE					
Asda	6,725	56%	3,766	11,905	44,834
Tesco	1,870	80%	1,496	11,192	16,743
Iceland	498	90%	448	4,717	2,114
Marks & Spencer	279	100%	279	9,641	2,690
SUB TOTAL	**9,372**		**5,989**	**11,084**	**66,381**
CHURCH LANGLEY					
Tesco	3,434	70%	2,404	11,192	26,903
SUB TOTAL	**3,434**		**2,404**	**11,192**	**26,903**
OLD HARLOW					
Somerfield	218	90%	196	5,391	1,058
Other	305	100%	305	2,000	610
SUB TOTAL	**523**		**501**	**3,327**	**1,668**
STAPLE TYE					
Lidl	912	95%	866	2,826	2,448
Other	291	100%	291	2,000	581
SUB TOTAL	**1,203**		**1,157**	**2,619**	**3,030**
BUSH FAIR					
Co-op	110	95%	105	5,239	547
Spar	92	95%	87	5,793	506
Other	286	100%	286	2,000	572
SUB TOTAL	**488**		**478**	**3,402**	**1,626**
THE STOW					
Costcutter	163	95%	155	3,315	512
Other	450	100%	450	2,000	900
SUB TOTAL	**613**		**605**	**2,336**	**1,412**
TOWN CENTRES SUB-TOTAL	**15,632**		**11,134**	**9,073**	**101,020**
OUT OF CENTRE					
Tesco	3,840	90%	3,456	11,192	38,680
Sainsburys	4,744	70%	3,321	9,137	30,342
OUT-OF-CENTRE SUB-TOTAL	**8,584**		**6,777**	**10,185**	**69,022**
TOTAL ESTIMATED FLOORSPACE	**24,216**		**17,910**	**9,494**	**170,042**

Source: IGD / Mintel / Harlow District Council / 2007 Aldi Appeal Inquiry

Note: Assume all neighbourhoods centres gross: net ratio of 70:30

Note: Company Average Sales Densities derived from Mintel Rankings.

TABLE 11
CONVENIENCE GOODS FLOORSPACE: Committed New Floorspace as at June 2007

	Total Net Sales Area (sqm)	Convenience as a % of total Sales Area (%)	Total Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Estimated Turnover 2006 (£000s)	Total Estimated Turnover 2011 (£000s)	Total Estimated Turnover 2016 (£000s)	Total Estimated Turnover 2021 (£000s)
Sainsburys,Allendale Way (extension	2,152	70%	1,506	11,814	17,797	18,154	19,080	20,054

Source: Harlow Council

Harlow Retail Study

TABLE 12
HARLOW DISTRICT: Convenience Goods Floorspace Capacity Assessment
Assume Convenience Goods Floorspace is Under-Trading in 2007

Stage		CONVENIENCE GOODS 2007	2011	2016	2021
a	Total Available Convenience Goods Expenditure in Zones 1 - 11 (see Table 2) (£0	736,016	777,900	835,074	894,753
b	Harlow District: Total Convenience Goods Turnover of all Town Centre and Out-of-Centre Stores (see Tables 5 / 7 / 9) (£000)	165,321	173,637	185,171	197,113
c	Market Share of Convenience Goods Floorspace from Zones 1 - 11 % (a divided b	22	22	22	22
d	Existing Convenience Goods Floorspace (see Table 10) (sq m net)	17,910	17,910	17,910	17,910
e	Potential Average Sales Density (£ per sq m net) (1)	9,230	9,494	9,494	9,494
f	Sales from Existing Floorspace (d muliplied by e) (£000)	165,321	170,042	170,042	170,042
g	Sales from Committed Floorspace (Table 11) (£000)	0	17,797	17,797	17,797
h	**Forecast Residual Convenience Goods Spending to Support new shops/stores (b minus f minus g) (£000)**	**0**	**-14,202**	**-2,668**	**9,274**

	POTENTIAL CAPACITY FOR MAJOR FOODSTORE OPERATOR				
i	Average Sales Density of Major Foodstore Operator (£/sq.m)	11,000	11,001	11,003	11,005
j	Capacity for new floorspace (h divided by i) (sq m net)	0	-1,291	-242	843

	POTENTIAL CAPACITY FOR DISCOUNT FOODSTORE				
k	Average Sales Density of Discount Foodstore Operator (£/sq.m)	4,250	4,251	4,251	4,252
l	Capacity for new floorspace (h divided by k) (sq m net)	0	-3,341	-628	2,181

NOTES: (1) Average Sales Density at 2007 is derived from the household survey market shares.

Harlow Retail Study

TABLE 13
HARLOW DISTRICT: Convenience Goods Floorspace Capacity Assessment
Assume Convenience Goods Floorspace is in Equilibrium at 2007

Stage		CONVENIENCE GOODS 2007	2011	2016	2021
a	Total Available Convenience Goods Expenditure in Zones 1 - 11 (see Table 2) (£0	736,016	777,900	835,074	894,753
b	Harlow District: Total Convenience Goods Turnover of all Town Centre and Out-of-Centre Stores (see Tables 5 / 7 / 9) (£000)	165,321	173,637	185,171	197,113
c	Market Share of Convenience Goods Floorspace from Zones 1 - 11 % (a divided b	22	22	22	22
d	Existing Convenience Goods Floorspace (see Table 10) (sq m net)	17,910	17,910	17,910	17,910
e	Potential Average Sales Density (£ per sq m net) (1) (2)	9,230	9,231	9,233	9,234
f	Sales from Existing Floorspace (d muliplied by e) (£000)	165,321	165,340	165,365	165,390
g	Sales from Committed Floorspace (Table 11) (£000)	0	17,797	17,797	17,797
h	**Forecast Residual Convenience Goods Spending to Support new shops/stores (b minus f minus g) (£000)**	**0**	**-9,500**	**2,009**	**13,926**

	POTENTIAL CAPACITY FOR MAJOR FOODSTORE OPERATOR				
i	Average Sales Density of Major Foodstore Operator (£/sq.m) (2)	11,000	11,001	11,003	11,005
j	Capacity for new floorspace (h divided by i) (sq m net)	0	-864	183	1,265

	POTENTIAL CAPACITY FOR DISCOUNT FOODSTORE				
k	Average Sales Density of Discount Foodstore Operator (£/sq.m) (2)	4,250	4,251	4,251	4,252
l	Capacity for new floorspace (h divided by k) (sq m net)	0	-2,235	473	3,275

NOTES: (1) Average Sales Density at 2007 is derived from the household survey market shares.
(2) Assume a 'productivity' growth rate of 0.3% per annum for all convenience goods floorspace in accordance with PPS6

APPENDIX 6

CAPACITY PROJECTIONS: COMPARISON GOODS

Comparison Goods Capacity Assessment

Harlow Retail Study

TABLE 1

SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	POPULATION 2007	2011	2016	2021
1	CM18 6, CM18 7, CM19 4, CM19 5, CM20 1, CM20 2, CM20 3	64,363	64,949	65,921	66,760
2	CM17 0, CM17 9, CM21 0, CM21 9	30,463	30,905	31,524	32,106
3	CM16 5, CM16 6, EN9 2	15,509	15,759	16,151	16,499
4	CM16 4, CM16 7, RM4 1	15,537	15,791	16,192	16,546
5	IG10 1, IG 10 2, IG10 3	26,868	27,272	27,903	28,464
6	EN80, EN8 7, EN8 9, EN9 1, EN9 3, EN10 6, EN10 7	61,037	62,546	64,484	66,393
7	AL9 6, EN6 4, EN7 5, EN7 6, EN8 8, SG13 8	46,053	47,283	48,836	50,380
8	SG11 1, SG12 0, SG12 9, SG13 7, SG14 1, SG14 2, SG14 3	48,766	49,917	51,430	52,902
9	EN11 0, EN11 8, EN11 9, SG10 6, SG12 7, SG12 8	37,810	38,852	40,191	41,510
10	CB11 4, CM22 6, CM23 1, CM23 2, CM23 3, CM23 4, CM23 5, CM24 1, CM24 8	61,554	62,773	64,443	66,031
11	S11 2, CM50, CM59, CM61, CM227	24,988	25,429	26,086	26,684
TOTAL		**432,948**	**441,476**	**453,161**	**464,275**

Source: Mapinfo Area Profile Report

TABLE 1A

POPULATION GROWTH RATES

GROWTH RATES 2007-2011 (%)	2006-2016 (%)	2006-2021 (%)
0.9	2.4	3.7
1.5	3.5	5.4
1.6	4.1	6.4
1.6	4.2	6.5
1.5	3.9	5.9
2.5	5.6	8.8
2.7	6.0	9.4
2.4	5.5	8.5
2.8	6.3	9.8
2.0	4.7	7.3
1.8	4.4	6.8
2.0	**4.7**	**7.2**

Harlow District - 2007 Retail Study

TABLE 2 (a)

PER CAPITA RETAIL EXPENDITURE			
Convenience Goods:		Comparison Goods:	
2004	2004 with SFT removed 1.7%	2004	2004 with SFT removed 5.8%
£1,697	£1,668	£3,378	£3,182

Source: Mapinfo Expenditure Explanatory Volume 2004, Table 2 (p.12).

SOURCE: 2004 Expenditure Per Capita Estimates derived from Mapinfo Area Profile Report.

TABLE 2 (b)

ACTUAL AND PROJECTED GROWTH IN PER CAPITA RETAIL EXPENDITURE (% per annum):		
	Convenience Goods:	Comparison Goods:
2004 - 2005 (1)	0.1%	2.9%
2005 - 2021 (2)	0.9%	4.8%

SOURCE: Mapinfo Information Brief 06/02 (September 2006) - (1) Table 1 for actual growth; and (2) Table 2 for forecast growth 2005 - 2016

TABLE 2 (c)

SURVEY AREA (Zones 1 - 11): RETAIL EXPENDITURE PROJECTIONS (£ per capita in 2004 prices)	2004	2005	2006	2007	2011	2016	2021
Convenience Goods	1,668	1,670	1,685	1,700	1,762	1,843	1,927
Comparison Goods	3,182	3,274	3,432	3,596	4,338	5,484	6,933

Source: Tables 2a and 2b

Harlow District - 2007 Retail Study

TABLE 3

SURVEY AREA (Zones 1 - 11): TOTAL AVAILABLE EXPENDITURE PROJECTIONS (£000'S in 2004 prices)								
	CONVENIENCE GOODS				COMPARISON GOODS			
ZONE	2007	2011	2016	2021	2007	2011	2016	2021
1	109,418	114,443	121,478	128,660	231,465	281,751	361,513	462,831
2	51,787	54,456	58,092	61,875	109,552	134,067	172,879	222,583
3	26,365	27,768	29,763	31,797	55,774	68,363	88,573	114,384
4	26,413	27,824	29,838	31,888	55,875	68,502	88,797	114,710
5	45,676	48,054	51,419	54,856	96,624	118,307	153,021	197,334
6	103,764	110,209	118,829	127,953	219,504	271,327	353,632	460,287
7	78,291	83,315	89,994	97,093	165,618	205,116	267,818	349,273
8	82,903	87,956	94,774	101,953	175,374	216,542	282,044	366,757
9	64,277	68,459	74,063	79,998	135,974	168,542	220,409	287,779
10	104,642	110,609	118,754	127,255	221,363	272,312	353,408	457,777
11	42,480	44,807	48,071	51,426	89,863	110,312	143,056	184,994
TOTAL	**736,016**	**777,900**	**835,074**	**894,753**	**1,556,984**	**1,915,141**	**2,485,150**	**3,218,709**

TABLE 4 (a): HARLOW TOWN CENTRE - Market Share of Comparison Goods Spend by Category at 2007 (%)

	Clothing & Footwear	Furniture & Floor Coverings	H.Hold Textiles & Soft Furnishing	Domestic Appliances	TV, Hi Fi, Radio & Photo Equipment	DIY & Decorating Supplies	Chemists & Cosmetics	All Other Comparison Goods	WEIGHTED AVERAGE:
Average Spend in 2004 incl. SFT (£/capita):	776	345	121	106	435	367	433	795	£3,378
SFT Allowance (%)	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	
Average Spend in 2004 excl.SFT (£/capita)	£731	£325	£114	£100	£410	£346	£408	£749	£3,182
% of total Comparison Goods Spend	23.0%	10.2%	3.6%	3.1%	12.9%	10.9%	12.8%	23.5%	100.0%
Average Spend in 2007 (excl. SFT)	£826	£367	£129	£113	£463	£391	£461	£846	£3,596

TABLE 4 (a): HARLOW TOWN CENTRE - Market Share of Comparison Goods Spend by Category at 2007 (%)

	Clothing & Footwear	Furniture & Floor Coverings	H.Hold Textiles & Soft Furnishing	Domestic Appliances	TV, Hi Fi, Radio & Photo Equipment	DIY & Decorating Supplies	Chemists & Cosmetics	All Other Comparison Goods	WEIGHTED AVERAGE:
Survey Question:	Q6	Q7	Q8	Q9	Q10	Q11	Q12	Q13	
Survey Zone									
1	85.5	12.3	35.6	19.7	12.3	17.7	71.7	72.1	53.4
2	57.6	23.9	33.8	14.3	13.9	13.3	43.9	32.9	34.0
3	61.7	21.4	37.3	15.1	15.9	13.0	6.0	24.6	28.1
4	35.9	14.3	17.5	11.1	11.3	11.3	2.3	10.7	16.2
5	13.3	2.2	3.6	1.6	1.9	0.0	0.0	9.4	5.9
6	26.5	9.0	9.4	3.0	6.8	5.4	3.4	9.5	11.1
7	11.1	4.5	3.0	1.3	4.8	2.5	2.4	4.5	5.0
8	18.8	10.4	12.7	6.4	10.3	3.8	2.2	5.8	8.9
9	38.8	16.7	14.5	15.2	11.3	5.3	7.2	6.3	16.6
10	15.8	17.1	8.7	7.2	9.4	3.7	2.4	7.4	9.3
11	18.8	11.9	12.5	17.9	12.1	13.2	7.3	7.4	13.0

Source: Harlow Household Telephone Interview Survey, Dec 2006 - Jan 2007 (CBRE)

TABLE 4 (b): HARLOW TOWN CENTRE - Weighted % Market Share for Comparison Goods Spend (2007 - 2021)

Survey Zone	2007	2011	2016	2021
1	53.4	53.4	53.4	53.4
2	34.0	34.0	34.0	34.0
3	28.1	28.1	28.1	28.1
4	16.2	16.2	16.2	16.2
5	5.9	5.9	5.9	5.9
6	11.1	11.1	11.1	11.1
7	5.0	5.0	5.0	5.0
8	8.9	8.9	8.9	8.9
9	16.6	16.6	16.6	16.6
10	9.3	9.3	9.3	9.3
11	13.0	13.0	13.0	13.0

Source: Table 4(a)

TABLE 4 (c): HARLOW TOWN CENTRE - Comparison Goods Allocation (£000's in 2004 prices)

Survey Zone	2007	2011	2016	2021
1	123,625	150,483	193,083	247,197
2	37,236	45,568	58,760	75,654
3	15,664	19,200	24,875	32,124
4	9,025	11,065	14,343	18,529
5	5,679	6,953	8,994	11,598
6	24,326	30,069	39,190	51,010
7	8,220	10,181	13,293	17,336
8	15,645	19,317	25,160	32,717
9	22,509	27,900	36,486	47,639
10	20,569	25,303	32,839	42,537
11	11,646	14,296	18,540	23,975
Total	**294,144**	**360,336**	**465,564**	**600,317**

Source: Table 2 & 3

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TABLE 5 (a): HARLOW OUT-OF-CENTRE COMPARISON GOODS RETAIL FLOORSPACE - Weighted % Market Share for Comparison Goods Spend (2007 - 2021)

Survey Zone	HARLOW RETAIL PARK				PRINCES GATE RETAIL PARK				ST JAMES CENTRE				OAKS RETAIL PARK				QUEENSGATE CENTRE				TOTAL			
	2006	2011	2016	2021	2007	2011	2016	2021	2007	2011	2016	2021	2007	2011	2016	2021	2007	2011	2016	2021	2007	2011	2016	2021
1	7.7	7.7	7.7	7.7	3.1	3.1	3.1	3.1	0.3	0.3	0.3	0.3	7.0	7.0	7.0	7.0	6.9	6.9	6.9	6.9	25.0	25.0	25.0	25.0
2	10.3	10.3	10.3	10.3	2.1	2.1	2.1	2.1	0.2	0.2	0.2	0.2	4.1	4.1	4.1	4.1	4.3	4.3	4.3	4.3	21.0	21.0	21.0	21.0
3	5.7	5.7	5.7	5.7	2.3	2.3	2.3	2.3	0.5	0.5	0.5	0.5	3.6	3.6	3.6	3.6	4.6	4.6	4.6	4.6	16.7	16.7	16.7	16.7
4	4.5	4.5	4.5	4.5	0.8	0.8	0.8	0.8	0.5	0.5	0.5	0.5	2.3	2.3	2.3	2.3	2.0	2.0	2.0	2.0	10.1	10.1	10.1	10.1
5	1.8	1.8	1.8	1.8	0.9	0.9	0.9	0.9	0.0	0.0	0.0	0.0	0.5	0.5	0.5	0.5	1.0	1.0	1.0	1.0	4.3	4.3	4.3	4.3
6	3.3	3.3	3.3	3.3	1.1	1.1	1.1	1.1	0.3	0.3	0.3	0.3	1.6	1.6	1.6	1.6	2.0	2.0	2.0	2.0	8.2	8.2	8.2	8.2
7	1.3	1.3	1.3	1.3	0.4	0.4	0.4	0.4	0.1	0.1	0.1	0.1	0.4	0.4	0.4	0.4	0.9	0.9	0.9	0.9	3.0	3.0	3.0	3.0
8	1.2	1.2	1.2	1.2	0.8	0.8	0.8	0.8	0.2	0.2	0.2	0.2	0.6	0.6	0.6	0.6	1.3	1.3	1.3	1.3	4.0	4.0	4.0	4.0
9	5.1	5.1	5.1	5.1	1.5	1.5	1.5	1.5	0.1	0.1	0.1	0.1	3.3	3.3	3.3	3.3	2.3	2.3	2.3	2.3	12.3	12.3	12.3	12.3
10	2.2	2.2	2.2	2.2	1.0	1.0	1.0	1.0	0.2	0.2	0.2	0.2	1.4	1.4	1.4	1.4	2.3	2.3	2.3	2.3	7.1	7.1	7.1	7.1
11	4.0	4.0	4.0	4.0	1.5	1.5	1.5	1.5	0.4	0.4	0.4	0.4	2.4	2.4	2.4	2.4	3.4	3.4	3.4	3.4	11.6	11.6	11.6	11.6

Source: Harlow Household Telephone Interview Survey, Dec 2006 - Jan 2007 (CBRE)

TABLE 5 (b): HARLOW OUT-OF-CENTRE COMPARISON GOODS RETAIL FLOORSPACE - Comparison Goods Allocation (£000's in 2004 prices)

Survey Zone	HARLOW RETAIL PARK				PRINCES GATE RETAIL PARK				ST JAMES CENTRE				OAKS RETAIL PARK				QUEENSGATE CENTRE				TOTAL			
	2006	2011	2016	2021	2007	2011	2016	2021	2007	2011	2016	2021	2007	2011	2016	2021	2007	2011	2016	2021	2007	2011	2016	2021
1	17,738	21,591	27,703	35,468	7,271	8,850	11,356	14,538	695	845	1,085	1,389	16,272	19,808	25,415	32,538	15,937	19,400	24,892	31,868	57,913	70,494	90,451	115,801
2	11,294	13,821	17,823	22,947	2,283	2,794	3,603	4,639	237	290	374	481	4,494	5,500	7,092	9,131	4,667	5,711	7,365	9,482	22,975	28,116	36,256	46,680
3	3,199	3,921	5,080	6,561	1,300	1,593	2,064	2,665	261	320	414	535	1,988	2,437	3,158	4,078	2,585	3,169	4,105	5,301	9,333	11,440	14,821	19,140
4	2,536	3,110	4,031	5,207	439	539	698	902	301	369	478	617	1,290	1,581	2,049	2,647	1,095	1,342	1,740	2,247	5,661	6,940	8,997	11,622
5	1,722	2,109	2,727	3,517	880	1,078	1,394	1,798	0	0	0	0	501	613	793	1,022	1,011	1,238	1,601	2,065	4,114	5,037	6,515	8,402
6	7,156	8,845	11,528	15,005	2,407	2,976	3,878	5,048	552	682	889	1,157	3,576	4,420	5,760	7,498	4,317	5,337	6,956	9,054	18,008	22,259	29,011	37,761
7	2,102	2,603	3,399	4,433	670	830	1,083	1,413	89	110	144	188	684	847	1,106	1,442	1,484	1,838	2,400	3,129	5,029	6,228	8,132	10,605
8	2,025	2,500	3,256	4,234	1,322	1,632	2,126	2,764	269	332	432	562	972	1,200	1,563	2,032	2,343	2,893	3,768	4,899	6,930	8,556	11,144	14,492
9	6,900	8,553	11,185	14,604	2,002	2,482	3,246	4,238	156	193	253	330	4,539	5,626	7,357	9,606	3,119	3,866	5,056	6,602	16,716	20,720	27,097	35,379
10	4,872	5,994	7,779	10,076	2,250	2,768	3,592	4,653	407	501	650	842	3,110	3,826	4,965	6,432	5,023	6,179	8,019	10,388	15,663	19,267	25,005	32,390
11	3,575	4,389	5,692	7,361	1,335	1,638	2,125	2,748	317	389	505	653	2,138	2,624	3,403	4,400	3,071	3,769	4,888	6,321	10,436	12,810	16,613	21,483
Total	**63,120**	**77,436**	**100,204**	**129,412**	**22,160**	**27,180**	**35,166**	**45,407**	**3,282**	**4,031**	**5,223**	**6,753**	**39,562**	**48,480**	**62,661**	**80,826**	**44,652**	**54,742**	**70,789**	**91,357**	**172,776**	**211,869**	**274,042**	**353,755**

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TABLE 6: HARLOW DISTRICT COMPARISON GOODS FLOORSPACE

TOWN CENTRES	Net Floorspace Sq m
Harlow Town Centre	41,609
Neighbourhood Centres	19,215
Hatches	6,747
TOTAL COMPARISON GOODS FLOORSPACE:	**67,571**

Source: Various. Including Council, Experian Goad and GVA Audits of Centres

OUT-OF-CENTRE COMPARISON GOODS FLOORSPACE	Net Floorspace Sq m	Company Average Sales Density (£ per sq m)	Estimated Turnover (£000's)
Harlow Retail Park			
Comet	1,914	6,355	12,162
Homebase	7,527	1,368	10,297
SUB TOTAL	**9,441**	**2,379**	**22,459**
The Queensgate Centre			
Mothercare World	1,396	2,394	3,343
PC World	1,860	6,554	12,192
Sportsworld	688	4,180	2,874
Bella Italia	-	-	-
Brantano	684	3,474	2,375
Toys R US	3,725	1,312	4,888
Laura Ashley Home	494	2,096	1,035
Burger King	-	-	-
Pizza Hut	-	-	-
ScS	837	1,489	1,246
Miller Bros	1,012	4,767	4,824
Currys	2,334	4,755	11,096
Vacant (Formerly Homebase)	3,308	-	-
Vacant (Formerly Powerhouse)	931	-	-
SUB TOTAL	**17,267**	**2,541**	**43,871**
Princess Gate Retail Park			
Wickes	2,376	2,504	5,951
Focus	3,873	1,015	3,931
MFI	3,717	2,096	7,790
Harveys	1,272	2,096	2,667
Dreams	1,029	1,444	1,485
SUB TOTAL	**12,267**	**1,779**	**21,824**
The Oaks			
B&Q	3,464	2,008	6,955
Topps Tiles	630	1,534	967
Carphone Warehouse (sublet from Mcdonalds)	-	16,847	-
Mcdonalds	-	-	-
Carpet Right	1,060	1,288	1,366
Halfords	1,391	2,060	2,864
Kingdom of Leather	1,190	1,579	1,879
Kingsbury Furniture	2,345	2,096	4,915
SUB TOTAL	**10,080**	**1,880**	**18,947**
St James Centre			
Allied Carpets	1,016	1302	1,323
Pets at Home	1,024	2161	2,212
Staples	1,257	1780	2,237
The Range	3,374	2096	7,071
SUB TOTAL	**6,670**	**1,925**	**12,843**

TOTAL OUT OF CENTRE	**55,726**	**2,152**	**119,944**

Sources: Various. Including Trevor Woods Database/ IGD / Council / Mintel

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TABLE 7: HARLOW DISTRICT COMPARISON GOODS FLOORSPACE - Commitments

	Net Floorspace (sqm)	Average Sales Density (£ per sq m net)	Estimated Comparison Goods Turnover 2006 (£000s)	Estimated Comparison Goods Turnover 2011 (£000s)	Estimated Comparison Goods Turnover 2016 (£000s)	Estimated Comparison Goods Turnover 2021 (£000s)
Demolition of Existing Floorspace if Harvey Centre Extension is Developed	-10,673	7,069	-75,450			
Harvey Centre Redevelopment	22,249					
Anchor Store	7,455	2,500	18,638			
Other Shops & Stores	14,794	6,500	96,161			
TOTAL (net additional floorspace):	**11,576**		**39,349**	**42,390**	**45,666**	**49,195**

Source: CBRE

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TABLE 8: HARLOW DISTRICT - COMPARISON GOODS FLOORSPACE CAPACITY

Stage		2007	2011	2016	2021
a	Total Available Comparison Goods Expenditure in Zones 1-11 (Table 2) (£000	1,556,984	1,915,141	2,485,150	3,218,709
b	Harlow District: Town Centre & Out-of-Centre Comparison Goods Turnover (Tables 4 & 6) (£000)	466,920	572,205	739,606	954,071
c	Market Share from Survey Area % (a divided by b)	30.0	30.0	30.0	30.0
d	All Existing Town Centre & Out-of-Centre Floorspace (Table 6) (sq m net)	123,297	123,297	123,297	123,297
e	Sales per sq m net £ (b divided by d) (1)	3,787	4,019	4,330	4,665
f	Sales from Existing Floorspace (£000) (d multiplied by e)	466,920	495,572	533,872	575,131
h	**Residual Spending to Support new shops (£000) (b minus f)**	**0**	**76,633**	**205,735**	**378,940**
i	Sales per sq m net in new shops (£) (1)	5,000	5,307	5,717	6,159
J	**Capacity for new floorspace (sq m net) (h divided by I)**	**0**	**14,440**	**35,987**	**61,528**

Notes: (1) Assume a 'productivity' growth rate of 1.5% per annum for all comparison goods floorspace in accordance with PPS6

Harlow Retail Study

TABLE 9: HARLOW TOWN CENTRE - COMPARISON GOODS FLOORSPACE CAPACITY

Assuming N0 Harvey Centre Extension & NO Demolition of Existing Town Centre Floorspace

		2007	2011	2016	2021
a	Total Available Comparison Goods Expenditure in Zones 1-11 (Table 2) (£000	1,556,984	1,915,141	2,485,150	3,218,709
b	Harlow Town Centre: Comparison Goods Turnover (Tables 4 & 6) (£000)	294,144	360,336	465,564	600,317
c	Market Share from Survey Area % (a divided by b)	18.9	18.9	18.9	18.9
d	**Existing Town Centre Floorspace (Table 7) (sq m net)**	**41,609**	**41,609**	**41,609**	**41,609**
e	Sales per sq m net £ (b divided by d) (1)	7,069	7,503	8,083	8,708
f	Sales from Existing Floorspace (£000) (d multiplied by e)	294,144	312,194	336,321	362,314
h	**Residual Spending to Support new shops (£000) (b minus f)**	**0**	**48,142**	**129,243**	**238,003**
i	Sales per sq m net in new shops (£) (1)	5,000	5,307	5,717	6,159
j	**Capacity for new floorspace (sq m net) (h divided by i)**	**0**	**9,072**	**22,607**	**38,645**

Notes: (1) Assume a 'productivity' growth rate of 1.5% per annum for all comparison goods floorspace in accordance with PPS6

Harlow Retail Study

TABLE 10: HARLOW TOWN CENTRE - COMPARISON GOODS FLOORSPACE CAPACITY

Assuming Harvey Centre Extension & Demolition of Existing Floorspace

		2007	2011	2016	2021
a	Total Available Comparison Goods Expenditure in Zones 1-11 (Table 2) (£000)	1,556,984	1,915,141	2,485,150	3,218,709
b	Harlow Town Centre: Comparison Goods Turnover (Tables 4 & 6) (£000)	294,144	360,336	465,564	600,317
c	Market Share from Survey Area % (a divided by b)	18.9	18.9	18.9	18.9
d	**Existing Town Centre Floorspace (Table 6) minus Demolitions (Table 7) (sq m net)**	**41,609**	**30,936**	**30,936**	**30,936**
e	Sales per sq m net £ (b divided by d) (1)	7,069	7,503	8,083	8,708
f	Sales from Existing Floorspace (£000) (d multiplied by e)	294,144	232,114	250,053	269,378
h	**Residual Spending to Support new shops (£000) (b minus f)**	**0**	**128,222**	**215,512**	**330,939**
i	Sales per sq m net in new shops (£) (1)	5,000	5,307	5,717	6,159
j	**Capacity for new floorspace (sq m net) (h divided by i)**	**0**	**24,162**	**37,697**	**53,735**
k	Harvey Centre Extension	0	22,249	22,249	22,249
l	**Revised Capacity for New Retail Floorspace (sq.m net)**	**0**	**1,913**	**15,448**	**31,486**

Notes: (1) Assume a 'productivity' growth rate of 1.5% per annum for all comparison goods floorspace in accordance with PPS6

Harlow Retail Study

TABLE 11: HARLOW TOWN CENTRE - COMPARISON GOODS FLOORSPACE CAPACITY

Assuming Potential Uplift in Maket Share Due to New Town Centre Development & Investment

		2007	2011	2016	2021
	ZONES 1 & 2				
a	Total Available Expenditure (£000)	341,017	415,819	534,392	685,415
b	Harlow Town Centre: Comparison Goods Turnover from Zones 1 - 2	160,860	216,226	320,635	411,249
c	Market Share from Zones 1 & 2 (%)	**47%**	**52%**	**60%**	**60%**
	ZONES 3 - 11				
	Total Available Expenditure (£000)	1,215,967	1,499,322	1,950,758	2,533,295
	Harlow Town Centre: Comparison Goods Turnover from Zones 3 - 11	133,284	149,932	234,091	303,995
	Market Share from Zones 1 & 2 (%)	**8%**	**10%**	**12%**	**12%**
	HARLOW TOWN CENTRE: TOTAL COMPARISON GOODS TURNOVER (ZONES 1 - 11)	**294,144**	**366,158**	**554,726**	**715,244**
	HARLOW TOWN CENTRE: TOTAL MARKET SHARE (ZONES 1 - 11)	**19%**	**19%**	**22%**	**22%**
d	Existing Town Centre Floorspace (Table 6) minus Demolitions (Table 7) (sq m net)	41,609	30,936	30,936	30,936
e	Sales per sq m net £ (b divided by d grown at 1.5% efficiency)	7,069	7,503	8,083	8,708
f	Sales from Existing Floorspace (£000) (d multiplied by e)	294,144	232,114	250,053	269,378
h	Residual Spending to Support new shops (£000) (b minus f)	0	134,044	304,673	445,867
i	Sales per sq m net in new shops (£) (Assumed optimum density grown at 1.5% efficiency)	5,000	5,307	5,717	6,159
j	Capacity for new floorspace (sq m net) (h divided by i)	0	25,259	53,293	72,395
	Harvey Centre Extension	0	22,249	22,249	22,249
	Residual Capacity for New Retail Floorspace (sq.m net)	**0**	**3,010**	**31,044**	**50,146**

Mill

	Occupier	Activity	Floorspace (sqm gross)
1	Tiles & Blinds	Comparison	44.69
	Sub Total Comparison		44.69
1	Newsagent	Convenience	43.96
	Sub Total Convenience		43.96
1	Bookmakers	Service	42.19
2	Café	Service	88.75
	Sub Total Service		130.94
	TOTAL	**4**	**219.59**

Burgoyne

	Occupier	Activity	Floorspace (sqm gross)
1	B&U Convenience Store	Convenience	169.08
	Sub Total Convenience		169.08
1	Purple Emporer Pub	Leisure	242.03
	Sub Total Leisure		411.11
1	Barbers	Service	66.41
2	Chinese Takeaway	Service	75.58
	Sub Total Service		141.99
	TOTAL	**4**	**722.18**

Clifton

	Occupier	Activity	Floorspace (sqm gross)
1	Newsagents	Convenience	30.49
	Sub Total Convenience		30.49
1	Chinese & Fish T/A	Service	63.03
	Sub Total Service		63.03
1	Vacant (former convenience store)	Vacant	95.67
2	Vacant (former Happy Shopper Mini-Market)	Vacant	94.58
3	Possibly Vacant & no longer in use as community centre.	Vacant	123.50
	Sub Total Vacant		313.75
	TOTAL	**5**	**407.27**

Coppice

	Occupier	Activity	Floorspace (sqm gross)
1	Common Room/Pre-School	Community	110.07
	Sub Total Community		110.07
1	Newsagents	Convenience	120.34
2	Newsagents	Convenience	120.34
	Sub Total Convenience		240.68
1	The Archers Dart Public House	Leisure	227.73
	Sub Total Leisure		227.73
	TOTAL	**4**	**578.48**

Elm

	Occupier	Activity	Floorspace (sqm gross)
1	Newsagent	Convenience	95.49
2	Premier Mini Market	Convenience	93.22
	Sub Total Convenience		188.71
1	Humming Bird Pub	Leisure	180.29
	Sub Total Leisure		180.29
	TOTAL	**4**	**369.00**

Fishers

	Occupier	Activity	Floorspace (sqm gross)
1	McColls Convenience Store	Convenience	122.49
	Sub Total Convenience		122.49
1	The Garden Tiger Pub	Leisure	222.05
	Sub Total Leisure		222.05
1	Council Offices	Offices	331.81
	Sub Total Offices		331.81
1	Bookmakers	Service	38.65
2	Fish & Chip Shop	Service	54.73
	Sub Total Service		93.38
	TOTAL	**5**	**769.73**

Katherines

	Occupier	Activity	Floorspace (sqm gross)
1	Common Room	Community	135.90
	Sub Total Community		135.90
1	Premier Convenience Store	Convenience	143.87
2	Newsagents	Convenience	48.61
	Sub Total Convenience		192.48
1	Chinese T/A	Service	48.61
	Sub Total Service		48.61
	TOTAL	**4**	**376.98**

Manor

	Occupier	Activity	Floorspace (sqm gross)
1	Co-op Convenience store	Convenience	174.63
	Sub Total Convenience		174.63
1	Glazing & decorating contractors	Service	87.47
	Sub Total Service		87.47
	TOTAL	**2**	**262.10**

Maunds

	Occupier	Activity	Floorspace (sqm gross)
1	Pre-School	Community	156.98
	Sub Total Community		156.98
1	Premier Convenience Store	Convenience	262.05
	Sub Total Convenience		262.05
	TOTAL	**2**	**419.03**

Pollard

	Occupier	Activity	Floorspace (sqm gross)
1	Pre-School	Community	121.29
	Sub Total Community		121.29
1	Mini-Market	Convenience	105.66
2	Newsagents	Convenience	95.30
	Sub Total Convenience		200.96
1	Chinese T/A	Service	84.76
	Sub Total Service		84.76
	TOTAL	**4**	**407.01**

Prentice Place

	Occupier	Activity	Floorspace (sqm gross)
1	Pharmacy	Comparison	75.16
	Sub Total Comparison		75.16
1	Baker	Convenience	37.79
2	Convenience Store	Convenience	47.25
3	Premier Supermarket	Convenience	191.93
	Sub Total Convenience		276.97
1	Red Lion Pub	Leisure	288.46
	Sub Total Convenience		288.46
1	Post Office	Misc	49.63
2	Public Convenience	Misc	37.09
	Sub Total Convenience		86.72
1	Bookmakers	Service	87.58
2	Chinese takeaway	Service	68.81
3	Doctors Surgary & Health Centre	Service	344.28
4	Fish & Chip Shop	Service	65.39
5	Hair & Beauty salon	Service	65.39
	Sub Total Convenience		631.45
	TOTAL	**12**	**1358.76**

Pypers

	Occupier	Activity	Floorspace (sqm gross)
1	Pharmacy	Comparison	67.60
	Sub Total Comparison		67.60
1	Heart & Club Pub	Leisure	285.14
	Sub Total Leisure		285.14
1	Chinese Takeaway	Service	40.79
2	Hair & Beauty Salon	Service	49.60
	Sub Total Service		90.39
	TOTAL	**4**	**443.13**

Sherards

	Occupier	Activity	Floorspace (sqm gross)
1	Common Room	Community	155.59
	Sub Total Community		155.59
1	Premier Convenience Store	Convenience	223.95
	Sub Total Convenience		223.95
1	PH- The Drinker Moth	Leisure	284.50
	Sub Total Leisure		284.50
	TOTAL	**3**	**664.04**

Slacksbury

	Occupier	Activity	Floorspace (sqm gross)
1	Premier Convenience Store	Convenience	74.34
	Sub Total Convenience		74.34
1	Chinese T/A	Service	40.09
2	Fish Bar	Service	77.69
3	Hairdressers - possibly vacant	Service	37.70
	Sub Total Service		155.48
1	Vacant	Vacant	61.80
2	Vacant	Vacant	35.47
3	Vacant	Vacant	34.95
	Sub Total Vacant		132.22
	TOTAL	**7**	**362.04**

Sumners

	Occupier	Activity	Floorspace (sqm gross)
1	Vantage Pharmacy	Comparison	174.10
	Sub Total Comparison		174.10
1	Food & Wine Store	Convenience	171.79
	Sub Total Convenience		171.79
1	The Herald Public House	Leisure	479.49
	Sub Total Leisure		479.49
1	Chinese	Service	168.32
	Sub Total Service		168.32
	TOTAL	**4**	**993.70**

Cawley

	Occupier	Activity	Floorspace (sqm gross)
1	Little Piggy's Pantry	Service	65.47
2	Top Café	Service	65.47
3	Tote Sport Betting	Service	70.24
	Sub Total Service		201.18
1	Vacant Convenience Store	Vacant	70.24
2	Vacant Club	Vacant	193.97
	Sub Total Vacant		264.21
	TOTAL	**5**	**465.39**

Colt

	Occupier	Activity	Floorspace (sqm gross)
1	Community Centre	Community	228.92
	Sub Total Community		228.92
1	Co-Op	Convenience	210.53
	Sub Total Convenience		210.53
1	Doggy Style Grooming	Service	56.08
2	Dry Cleaners	Service	55.51
3	Fish & Chips/Chinese T/A	Service	59.47
4	Hair Salon	Service	51.16
	Sub Total Service		222.22
	TOTAL	**6**	**661.67**

Ward

	Occupier	Activity	Floorspace (sqm gross)
1	Jads Convenience store	Convenience	111.88
	Sub Total Convenience		111.88
1	White Admiral Pub	Leisure	145.89
	Sub Total Convenience		145.89
1	Chinese Takeaway	Service	70.58
	Sub Total Convenience		70.58

TOTAL	**3**	**328.35**

THE ROWS
POST OFFICE WALK
MARKET HOUSE
STONE CROSS
THE ROWS
EAST GATE
WEST SQUARE
EAST GATE
TERMINUS STREET
WEST GATE
EAST WALK
BROAD WALK
LITTLE WALK
WEST WALK
WEST GATE
HARVEY CENTRE
HARVEY CENTRE APPROACH
THE HIGH
THE WATER GARDENS
PLAYHOUSE SQUARE
COLLEGE SQUARE