

**EAST HERTS DISTRICT COUNCIL
RETAIL AND TOWN CENTRES STUDY
EXECUTIVE SUMMARY**

AUGUST 2008

PREPARED AT THE OFFICES OF

CHASE & PARTNERS LLP, 20 REGENT STREET, ST JAMES'S, LONDON SW1Y 4PH
TEL: 020 7389 9494 FAX: 020 7389 9456
www.chaseandpartners.co.uk

CHARTERED SURVEYORS • COMMERCIAL PROPERTY CONSULTANTS • CHARTERED TOWN PLANNERS

Introduction

1.1 Chase & Partners were instructed by East Herts Council in February 2008 to undertake an assessment of future retail requirements for the District's main settlements – namely Hertford, Ware, Bishop's Stortford, Buntingford and Sawbridgeworth. This study will form part of the evidence base for the Council's emerging Local Development Framework (LDF) and will inform the Council's Preferred Options for its Core Strategy, assist in the formulation of policies for new retail development in the emerging LDF and provide background information to assist the determination of planning applications for such development in the future.

1.2 The study examines:

- retail health of the five study towns, assessing them against the PPS 6 indicators of vitality and viability;
- current shopping patterns in the District;
- the quantitative need for further retail floorspace;
- the adequacy of existing retail policies.

The study also makes specific recommendations for retail policy for the LDF including the designated retail hierarchy and advice on potential redevelopment sites.

Retail Hierarchy

1.3 The hierarchy of towns within East Herts District is determined by their role and function, with reference to the descriptions of the various types of locations given in Annex A to PPS6. In our view, the following hierarchy is appropriate:

- Principal Town Centre: Bishop's Stortford;
- Secondary Town Centre: Hertford;
- Minor Town Centres: Ware, Buntingford and Sawbridgeworth;
- District Centre: Thorley Centre, Bishop's Stortford;
- Village Centres.

1.4 This hierarchy includes recognition of the important role played by the Thorley Centre, Bishop's Stortford in terms of providing significant food shopping as well

as other retail and service uses. This Centre now fits the PPS6 definition of a District Centre and we recommend that it is designated as such.

Retail Healthchecks

- 1.5 The health of the five main centres in East Herts District have been assessed, where information is available, using the indicators of vitality and viability outlined in chapter four of PPS6, "Planning for Town Centres". The results show that all five centres are vital and viable, though variations exist in terms of their level of health and their ability to sustain this. It is also important to bear in mind the different roles performed by the centres.
- 1.6 Across the five study towns, key indicators of retail health are positive. Vacancies are low, prime rental levels are rising (though not as high as might be expected in Bishop's Stortford and Hertford) and the centres are popular and environmentally attractive. There are extensive lists of national multiple retailers interested in locating in Hertford and Bishop's Stortford and a limited number of sites exist in these towns to provide space for growth.
- 1.7 The other towns' vitality is very much dependent upon the foodstores and services available, but these key stores appear to be trading well. There are no areas of deprivation or dereliction in any of the centres and most traders surveyed have confirmed that they intend to remain in place, with no intentions to close or relocate elsewhere. Overall, the picture to emerge is of five vital and viable town centres, fulfilling their roles within the retail hierarchy.

Quantitative Need

- 1.8 Fundamental to the study is a survey of household shopping habits designed to identify the destinations used for the following types of shopping trips:
 - main food;
 - top-up food;
 - clothes, footwear and fashion;
 - furniture and floor coverings;
 - household textiles and soft furnishings;
 - domestic appliances e.g. fridges, washing machines;
 - radio, TVs, hi-fi, photographic equipment;
 - china, glass and hardware;

- DIY goods;
- books, jewellery, watches, recreational and luxury goods;
- chemists goods;

1.9 This data provides us with a picture of how many shopping trips are retained within the study towns and how many flow out of the District, and to where. By applying expenditure per capita data for the study area, we can value these in terms of expenditure flows and retention rates.

1.10 The general picture to emerge for convenience goods is that local expenditure is spent locally where possible. Hertford, Ware and Bishop's Stortford retain much of their respective zones' pool of expenditure. Residents of Buntingford and Sawbridgeworth have less choice and must travel, particularly for their main food shopping, but even so the foodstores in Buntingford perform well against strong competition from Stevenage.

1.11 For comparison goods, Bishop's Stortford is easily the best performing town, retaining most of its locally generated expenditure against competition from Harlow. However, the town is not a significant attractor of shopping visits from outside its zone and its catchment is therefore limited to its immediate environs. Hertford is similar, though retains less expenditure than Bishop's Stortford, particularly in the important clothing, footwear and fashion sector.

1.12 In terms of where East Herts' local expenditure is flowing to, most "leakage" is to Harlow, Stevenage and Welwyn Garden City. None of these towns can be regarded as more accessible or more environmentally attractive than Hertford or Bishop's Stortford and yet 35% of all comparison goods expenditure in East Herts goes to these towns. The relative strength of these centres is due to the presence of key attractors such as John Lewis in Welwyn Garden City, Primark in Stevenage and Harlow and Debenhams in Welwyn Garden City. Against this, Hertford and Bishop's Stortford have relatively weak key attractors.

1.13 Ware, Buntingford and Sawbridgeworth do not have significant comparison goods offers and this is reflected in the shopping patterns of the area, with residents of Buntingford tending to shop in Stevenage and residents of Sawbridgeworth looking to Harlow. Expenditure from these towns is therefore mostly spent outside of East Herts District.

1.14 In addition, our modelling exercise shows that growth in population and expenditure per capita will increase the value of East Herts' pool of expenditure, and indeed, the amount leaking out to other towns. Assuming the market share

of the study towns remains constant, and using a reasonable average turnover per square metre, we forecast a need for the following levels of floorspace:

Table 1: Convenience Goods Floorspace Requirements

Centre	Floorspace Requirement 2008-2013 (sq m)		Floorspace Requirement 2013-2018 (sq m)		Floorspace Requirement 2018-2021 (sq m)		Total Floorspace Requirement 2008-2021 (sq m)	
	Net	Gross	Net	Gross	Net	Gross	Net	Gross
Hertford	186	310	173	288	110	183	469	782
Ware	293	488	273	455	173	288	740	1,233
Bishop's Stortford	409	682	381	635	241	402	1,031	1,718
Buntingford	94	157	87	145	55	92	236	393
Sawbridgeworth	54	90	50	83	32	53	136	227

Table 2: Comparison Goods Floorspace Requirements¹

Centre	Floorspace Requirement 2008-2013 (sq m)		Floorspace Requirement 2013-2018 (sq m)		Floorspace Requirement 2018-2021 (sq m)		Total Floorspace Requirement 2008-2021 (sq m)	
	Net	Gross	Net	Gross	Net	Gross	Net	Gross
Hertford	4,432	6,331	5,641	8,059	3,403	4,861	13,476	19,251
Ware	1,742	2,489	2,194	3,139	1,291	1,844	5,227	7,467
Bishop's Stortford	11,282	16,117	13,999	19,999	8,025	11,464	33,306	47,580

1.15 All the above figures – both gross and net - represent floorspace *guidelines*. They should not be seen as either ceilings on the amount of floorspace that could be provided or targets that the Council must meet either across the District as a whole or in individual centres during the Plan period. The figures show a very limited need for further convenience floorspace but a considerable need for further comparison goods floorspace.

1.16 This modelling exercise shows the guideline quantum of floorspace which theoretically should be provided in order for the study towns to maintain their market share. Failure to do so runs the risk of falling further behind neighbouring and competing centres, most of which are in the process of improving their retail

¹ Buntingford and Sawbridgeworth are not significant comparison goods destinations and we do not anticipate any requirement for further floorspace to be planned for.

offers. In retail terms, standing still is akin to decline: as competing centres improve their offer, so must East Herts' main towns. We have therefore examined Bishop's Stortford and Hertford for potential development sites which might meet this identified need.

Potential Development Sites

1.17 We have identified several locations in Hertford and Bishop's Stortford which could, potentially, be developed for retail purposes. Specifically, these are:

- Council offices and adjacent car park (bounded by Link Road), Bishop's Stortford;
- Mill site, Bishop's Stortford;
- Riverside Yards, Hertford;
- Brewery site, Hertford.

1.18 The Bishop's Stortford sites in particular could be used to bring a major anchor store to the town, helping to stem the identified outflow of expenditure and preserve market share. We recommend further investigation of these sites to assess their development potential. We also recommend carrying out a masterplanning exercise to ensure that all the various uses in Bishop's Stortford are well related to each other.

Recommendations regarding existing policies

1.19 In our view, the existing retail policies of the Local Plan are appropriate and have struck the right balance between protection of the core retailing areas from non-retail uses and realism with regard to the secondary areas. Evidence of their success can be seen in the generally well occupied and well maintained secondary areas of the larger towns. We have made recommendations on the location of town centre boundaries and frontages, which do not differ dramatically from that included within the Local Plan, which remain appropriate and logical.

Monitoring

1.20 The data underpinning this study is, necessarily, a "snap shot" of the retail picture in East Herts. In order to maintain the integrity of the LDF evidence base, we recommend updates at regular intervals. Ideally, the quantitative need exercise should be undertaken again – with a new household survey – in five years' time. The health of the town centres should be monitored closely and we recommend

that all the study towns be assessed against the PPS6 tests of retail health on an annual basis.

Conclusions

- 1.21 Chase & Partners' survey work has shown that all five centres are vital and viable and East Herts Council's task is therefore to maintain this success. In this regard a number of threats to the future vitality of the towns exist and future planning policy must address these.
- 1.22 Of particular concern is the amount of comparison goods expenditure currently flowing out of the District and how this is expected to increase as other centres improve their retail offer. In order to maintain their current market share, the main comparison goods destinations (Hertford and Bishop's Stortford) must also improve their offer. Our modelling exercise has demonstrated a considerable need for further comparison goods retail floorspace which should theoretically be provided just to maintain current market share. As stated above, in retail terms, standing still is akin to decline. We have identified several sites which could, potentially, accommodate development which might address the identified need and these should be investigated further with a view to East Herts Council proactively seeking their redevelopment.
- 1.23 The five study towns are all successful, vital and viable. East Herts Council's task is therefore to manage and maintain this success and our recommendations are designed to achieve this through the LDF process.