Nathaniel Lichfield & Partners
Planning. Design. Economics.

East Herts

Retail and Town Centres Study Update

East Herts Council

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1.0 Introduction

1.1 Nathaniel Lichfield & Partners (NLP) has been commissioned by East Herts Council to prepare a Retail and Town Centres Study Update, and provide an assessment of the changes since the 2008 East Herts Council Retail and Town Centres Study.

Study Objectives

1.2 The key objective of the study is to provide a robust and credible evidence base to inform the Council's work on the next stages of the Local Plan preparation, taking into account changes since the previous study.

1.3 The objectives of the Study are to:

- assess changes in circumstances and shopping patterns since the previous Study was undertaken;
- assess the future need and (residual) capacity for retail floorspace distributed by town centre for the period up to 2031; and
- undertake health check assessments of the district's retail centres and audit of local shopping centres/parades.

1.4 The Study also provides strategic retail advice, which includes the following objectives:

- assess the economic role the retail sector and the town centres play in terms of jobs forecast and creation in the district up to 2031;
- assess the existing supply and demand for retail and other town centre uses and the role played by each of the centres;
- review the ability of centres to accommodate needs;
- review the appropriateness of the existing town centre boundaries and primary/secondary shopping frontages and whether any alterations should be proposed;
- assess the economic role the retail sector and the town centres play in terms of jobs forecast and creation in the district up to 2031;
- advise on the retail requirements associated with planned residential expansion; and
- provide advice on policies to be included in development plan documents to address future needs, and provide recommendations on how each town centre can develop its role.

1.5 The findings of the Study will need to be monitored, particularly in terms of the recovery from the recent recession. An update is likely to be required in 4-5 years.

2.0 The Shopping Hierarchy

Centres in East Herts and the Surrounding Area

2.1 East Herts District is bounded by Harlow, Welwyn Hatfield, Stevenage, North Hertfordshire, Broxbourne, Uttlesford and Epping Forest local authority areas.

2.2 Hertford, Ware and Bishop's Stortford are the main shopping centres within East Herts, together with the smaller centres at Buntingford and Sawbridgeworth.

2.3 Management Horizon Europe's UK Shopping Index ranks retail centres across the country. While this data is somewhat dated, it remains the most up to date national ranking of centres available. It should therefore be viewed in the context that the data will not take account of recent changes that may affect rankings. Management Horizon's rank for centres in East Herts and nearby centres outside the District is shown in Table 2.1 below.

Table 2.1 Management Horizons Europe Shopping Index

Centre	Rank	MHE Score	Classification
Stevenage	103	204	Regional
Welwyn Garden City	163	161	Sub-Regional
Bishop's Stortford	**210**	**133**	**Sub-Regional**
Harlow	218	129	Major District
Hertford	**487**	**71**	**District**
Hoddesdon	659	53	Minor District
Ware	**1,535**	**23**	**Local**
Buntingford	**2,779**	**10**	**Minor Local**
Sawbridgeworth	**4,226**	**4**	**Minor Local**
Stanstead Abbotts	**4,666**	**3**	**Minor Local**

*Source: Management Horizon Europe 2008 (**Bold** indicates centres within East Herts)*

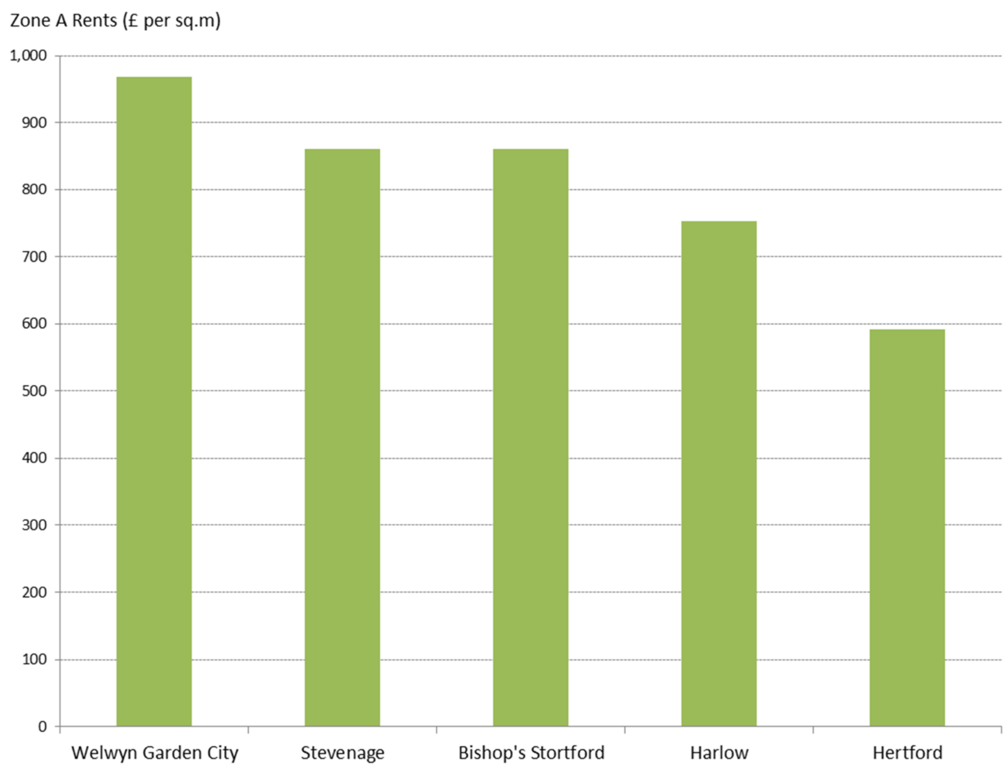
2.4 The MHE score does not necessarily reflect the overall size of the town centre or the number of shops, but the presence of national multiples and the relative draw and importance that stores have. Each centre is given a weighted score which takes account of its provision of multiple retailers and anchor store strengths. For example, anchor department stores such as John Lewis or Debenhams receive a higher score (10) than other multiple operators such as H&M (3) in order to reflect their major influence on non-food shopping patterns.

2.5 A location which has stronger retailers which attract more visitors to the centre and have a greater influence on shopping patterns will receive a higher score than those that do not. Towns with a higher number of independent shops may have a low MHE score in relation to their overall size because of the weight that is given to national multiple retailers and their influence on shopping patterns.

2.6 It should be noted that the centres within East Herts include a high proportion of independent retailers, which are not captured in MHE's rankings, and this data should therefore be viewed in this context. The MHE index identifies Bishop's Stortford as the highest ranked shopping destination in East Herts. Hertford is the second highest ranked centre in the District. Stevenage, Welwyn Garden City and Harlow are the other main centres in the sub-region. Excluding Bishop's Stortford, centres within East Herts are generally lower order centres, at the second or third tiers in the shopping hierarchy.

2.7 The relative performance and importance of town centres can be demonstrated by reviewing commercial property values for example Zone A rental levels achieved for retail property. Prime retail yields for selected centres are shown in Figure 2.1.

Figure 2.1 Retail Zone A Rents *(Source: Colliers CRE (2010)*



2.8 Bishop's Stortford and Hertford are the only centres in the District where information is available from Colliers CRE on prime Zone A rent figures (£861 and £592 per sq.m respectively). The retail rents are higher in larger centres outside the District, which reflects their position in the hierarchy.

Existing Retail Provision in East Herts

2.9 An assessment of the existing retail provision in the main centres is provided in the centre audits included at Appendix 4. A summary of existing retail provision is provided in Table 2.2 below.

Table 2.2 Existing Retail Service Provision

Centre	Town Centre Shop Units	Convenience Goods Floorspace (sq.m net)	Comparison Goods Floorspace (sq.m net)
Hertford	240	6,459	14,483
Ware	156	2,779	4,750
Bishop’s Stortford	283	10,858	20,025
Buntingford	46	1,716	1,259
Sawbridgeworth	66	861	975
Total	**791**	**22,671**	**41,491**

Source: Goad Plans, Table 10, Appendix 2 and Table 10, Appendix 3

2.10 The East Herts Local Plan 2007 identifies Bishop’s Stortford, Hertford, and Ware as larger town centres, and Buntingford and Sawbridgeworth as smaller town centres. The emerging District Plan suggests that Bishop’s Stortford should be classified as a Principal Town Centre, Hertford should be a Secondary Town Centre, and Ware, Buntingford, and Sawbridgeworth should be Minor Town Centres.

2.11 We consider that it is important for the District’s market towns to maintain, and strengthen, their role in the retail hierarchy. The smaller centres should continue to perform a more local function.

3.0 Assessment of Retail Needs

Introduction

3.1 This section assesses the quantitative and qualitative scope for new retail floorspace in East Herts in the period from 2013 to 2031. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken as part of the town centre audits in Appendix 4.

3.2 The quantitative analysis is based on a defined study area that covers the catchment areas of the main shopping destinations in the District. The study area is sub-divided into six zones as shown in Figure 3.1. The survey zones take into consideration the extent of the catchment areas of Hertford, Ware, Bishop's Stortford, Buntingford and Sawbridgeworth.

3.3 We have adopted the same study area as the 2008 East Herts Retail and Town Centres Study, following a review of the previous household survey results and retail studies within neighbouring authorities. This review confirms the previous study area remains the most appropriate area for assessing retail capacity. The study area includes the primary catchment areas of the District's towns and centres.

3.4 We have made one amendment to the zones, splitting the Bishop's Stortford zone into urban and rural areas, to allow more detailed analysis. There will, however, be leakage from the study area to centres outside, and conversely inflow from surrounding areas.

3.5 The methodology is summarised in Figure 3.2 and set out in more detail in Appendix 1.

Figure 3.1: Study Area

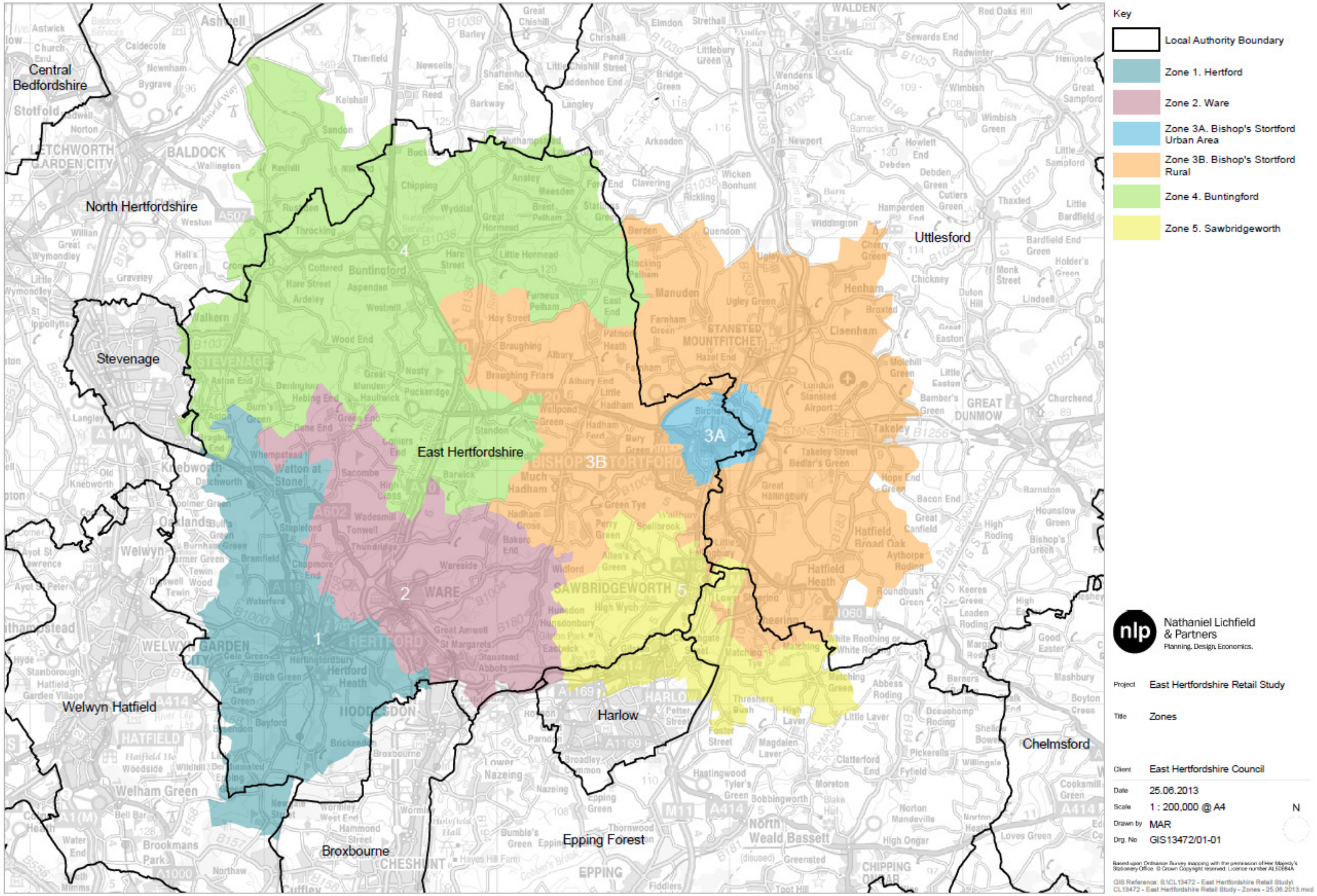
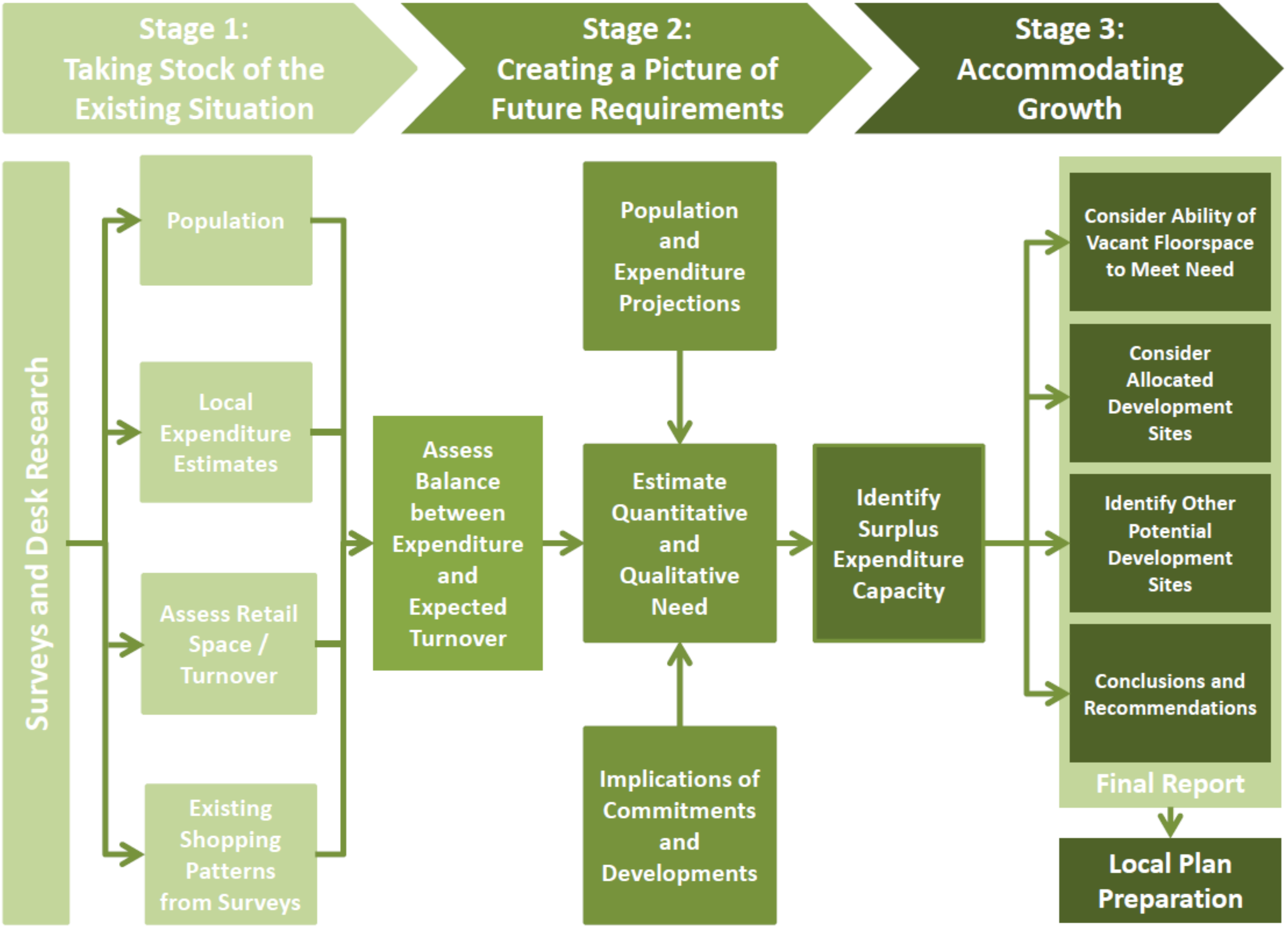


Figure 3.2: Methodology for Estimating Future Requirements for Retail Floorspace



Retail Trends

3.6 This section considers the changes in the retail sector nationally and the implications for East Herts.

3.7 The economic downturn is still having a significant impact on the sector. A number of national operators have failed (eg. Blockbuster, Comet, HMV, JJB Sports, Jessops, Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, Peacocks, La Senza, Past Times, Barratts and Habitat), leaving major voids within centres and retail parks. Argos has recently announced major shop closures. Many town centre development schemes have been delayed and the demand for traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth.

3.8 Assessing future expenditure levels within this study needs to take into account the economic downturn, particularly in the short term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the Local Plan period. This study takes a long term view for the Local Plan period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered and a balanced approach taken.

3.9 An overview of national tends within the retail sector is set out below.

Expenditure Growth

3.10 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However, the current economic downturn is expected to lead to limited growth in the short term.

3.11 In the past, expenditure growth has fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The economic downturn suggests that rates of growth during the past few years are unlikely to be achieved in the short term, but the underlying trend over the medium and long terms is expected to lead to a need for further retail floorspace. These national trends are anticipated to be mirrored in Hertfordshire.

New Forms of Retailing

3.12 New forms of retailing have emerged in recent years as an alternative to more traditional shopping facilities. Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. Trends within this sector may well have implications for retailing within Hertfordshire. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street and in Hertfordshire.

3.13 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure.

3.14 The household survey results suggest 5.4% of households in the East Herts Study Area do their main food and grocery shopping on the internet, and 5.0% of households do most of their non-food shopping on the internet. These figures represent a lower proportion than the internet's national share of retail expenditure (about 9%, Experian September 2012). This may be in part due to the lack of broadband in some rural areas of the District.

3.15 More details on internet shopping habits in the District are set out in the results of the household survey, summarised in Appendix 5. While the figures for East Herts are lower than the current national average, we expect that growth in internet sales in East Herts will increase, and this assumption is reflected in the allowance made for a growth in the proportion of non-store spending, as set out in the retail capacity methodology in Appendix 1. As East Herts includes some rural areas where access to retail facilities is limited, we would anticipate that this will further result in increased home shopping.

3.16 We note that the household survey undertaken to inform the 2008 East Herts Retail and Town Centres Study identified that just 1.5% of respondents used the internet for most of their main food shopping. A general "non-food" destination question was not asked which makes it difficult to estimate the overall proportion of non-food shopping undertaken on the internet, however the proportion of internet shopping for individual non-food categories ranged from 0.1% of chemists goods to 15.2% for books, jewellery, watches, recreational and luxury goods. This suggests that in general, internet spending has increased in East Herts since 2008.

3.17 Recent trends suggest continued strong growth in this sector, but there is still uncertainty about its longer-term prospects and the potential effects on the high street. Experian's Retail Planning Note 10 states:

"The strong increase in online shopping in the past decade has lifted the share of special forms of trading (SFT) to a level where it now accounts for around a tenth of total retail sales.

The rising share of internet sales in total retail transactions dominates the picture of SFT. Internet sales' share of total retail sales stood at near 9% in 2012 against 4.7% in June 2008 and just 2.9% as recently as March 2007.

Non-store retailing continues to grow rapidly, despite the tough retail environment. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the medium term. It is estimated that 85% of the UK adult population were internet users at the end of 2011, so growth of the internet user base will be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We now expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce *growth will moderate markedly after about 2020. Our new forecast has the SFT share of total retail sales reaching 17.4% by 2020 (15.4% in Retail Planner Briefing Note 9 of September 2011), rising to 20% by the end of the 2020s (15.5% previously)."*

3.18 This Study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

3.19 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises eg. food store operators, therefore growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure (as set out in the retail capacity methodology, Appendix 1).

3.20 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. For example, extended opening hours and Sunday trading increased significantly in the 1990s. Retailers also responded to stricter planning controls by changing their trading formats to include smaller store formats capable of being accommodated within town centres (such as the Tesco Metro, Sainsbury Central/Local store and Marks & Spencer's Simply Food formats). The main food store operators have also increasingly sought representation in small towns in predominantly rural areas. The expansion of European discount food operators Aldi and Lidl has also been rapid during the last decade.

3.21 Food store operators have had a recent programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have often increased the sale of non-food products within their food stores, including clothing and electrical goods. The recent recession has though first halted this trend, and is now reversing it.

3.22 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including a number of mergers and failures, and scaled down store sizes. Other traditional high street retailers often seek large out-of-centre stores, for example Boots, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across Great Britain. Sports clothing retail warehouses including Decathlon have also expanded out-of-centre.

3.23 Within town centres, many high street multiple comparison retailers have changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation of activity into the larger regional and sub-regional centres.

3.24 The economic downturn has had, and is likely to continue to have, an impact on the retail sector. The effects of the recession may continue to have an impact on shop vacancy levels in the District. The demand for premises within the bulky goods sector, ie. furniture, carpets, electrical and DIY goods, is particularly weak at present.

3.25 A key example of the effects that the economic downturn has had on East Herts will be vacant shop units. Table 3.1 below provides a comparison between the number of vacant units identified in the 2008 Retail Study (pre-recession) and in the 2013 audit of centres undertaken as part of this Study.

Table 3.1: Comparison of Vacant Units in East Herts

Centre	Vacant Units, 2008		Vacant Units, 2013		Difference
	Number	%	Number	%	
Hertford	7	3%	34	14%	+ 27
Ware	10	6%	19	12%	+ 9
Bishop’s Stortford	28	10%	36	13%	+ 8
Buntingford	4	8%	1	2%	- 3
Sawbridgeworth	5	8%	7	11%	+ 2

Source: East Herts Retail and Town Centres Study, 2008, GOAD and NLP Audit

3.26 This table shows that the number of vacant units has increased in all centres except Buntingford between 2008 and 2012. The most noticeable increase is in Hertford, where the proportion of vacant units has increased from 3% to 14.2%, which is higher than the national average (13.7%). While clearly there will be a number of reasons that could account for an increase in vacant units in Hertford, the economic downturn will be a factor.

3.27 The continuation of national trends will influence future operator requirements in East Herts with smaller vacant units becoming less attractive for new occupiers and existing retailers looking to relocate into larger units in higher order centres.

3.28 Operator demand for space has decreased during the recession and of those national multiples looking for space many are likely to prefer to locate in larger centres such as Stevenage, Harlow, Welwyn Garden City, Chelmsford and Cambridge. Demand from multiples within the District’s centres is likely to be weaker, which will affect the appropriate strategies for individual centres. It is noted that the District’s town centres have maintained a relatively strong independent retail sector.

Population and Expenditure

3.29 The study area population for 2011 to 2031 is set out in Table 1 in Appendix 2. Population data from Experian and the 2011 Census have been adopted. Having reviewed the Edge Analytics Ltd Greater Essex Demographic Forecast work, we have applied to ONS Interim 2011-based Subnational Population projections to the 2011 Census data, to forecast population growth. Population within the study area is expected to increase between 2013 and 2031 by 21% (37,632 people).

3.30 Table 2 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2031. Forecasts of comparison goods spending per capita are shown in Table 2 in Appendix 3.

3.31 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 34% from £344.72 million in 2013 to £461.61 million in 2031, as shown in Table 3 (Appendix 2).

3.32 Comparison goods spending is forecast to increase by 89% between 2013 and 2031, increasing from £562.12 million in 2013 to £1,065.09 million in 2031, as shown in Table 3 (Appendix 3).

3.33 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on food and drink does not increase proportionately with disposable income whereas spending on non-food goods does.

3.34 These figures relate to real growth and exclude inflation.

Existing Retail Floorspace 2013

3.35 Existing convenience goods retail sales floorspace within East Herts is 22,671 sq.m net, as set out in Table 11 in Appendix 2. This floorspace figure excludes comparison sales floorspace within food stores (3,136 sq.m net).

3.36 Comparison goods retail floorspace within East Herts is estimated as 41,491 sq.m net, as shown in Table 11 in Appendix 3. 48% of this floorspace is located in Bishop’s Stortford and a further 35% in Hertford.

Existing Spending Patterns 2013

3.37 The results of the household shopper questionnaire survey undertaken by NEMS in June 2013 have been used to estimate existing shopping patterns within the study area shown in Figure 3.1 above. A summary of the methodology and results is shown in Appendix 5.

Convenience Shopping

3.38 The results of the household shopper survey have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 2.

3.39 Table 4 (Appendix 2) indicates the proportion of residents within each zone that carry out their convenience retail shopping within the study area ranges from 97.3% in Zone 3A (Bishop's Stortford urban area) down to 37.5% in Zone 5 (Sawbridgeworth).

3.40 The level of convenience goods expenditure attracted to shops/stores in East Herts in 2013 is estimated to be £271.49 million as shown in Table 5, Appendix 2. This includes estimates of inflow from beyond the study area, applying the market shares, identified in Table 4. The market share of total convenience expenditure generated within the study area that is retained by shops/stores in East Herts (ie. excluding any inflow to these shops/ stores from beyond the study area) is estimated to be about 71% (£246.02 million out of £344.72 million available expenditure in the study area). Consequently, 29% of available expenditure in the study area is leaking to facilities outside East Herts District (about £99 million). Over half of the leakage relates to Zone 5 (Sawbridgeworth – about £27 million) and Zone 4 (Buntingford – about £13 million).

3.41 We note that in the 2008 Retail Study, around 68% of convenience goods spending within the study area was retained within East Herts. This suggests that there has been a limited increase in the level of retention in the District.

3.42 The total benchmark turnover of the existing convenience sales floorspace within the five main centres (Hertford, Ware, Bishop's Stortford, Buntingford and Sawbridgeworth) in East Herts is £233.19 million (Table 10, Appendix 2). The actual turnover of this convenience floorspace is £237.83 million (Table 5, Appendix 2, excluding "other shops").

3.43 These figures suggest that collectively convenience retail facilities in the five main centres are trading about 2% above average, with a surplus of available convenience expenditure of £4.65 million.

Comparison Shopping

3.44 The estimated comparison goods expenditure currently attracted by shopping facilities within East Herts is £199.41 million in 2013, as shown in Table 5, Appendix 3. This includes estimates of inflow from beyond the study area. The market share of total comparison goods expenditure generated within the study area that is retained by centres/facilities in East Herts (ie. excluding any inflow to these shops/stores from beyond the study area) is 32% (£179.64 million out of £562.12 million available expenditure in the study area).

3.45 The lower retention levels compared to the convenience goods market shares reflects the influence of higher order centres outside East Herts, in particular Harlow, Stevenage and Welwyn Garden City.

3.46 We note that in the 2008 Retail Study, around 37% of comparison goods spending within the study area was retained within East Herts. This suggests that there has been a decrease in the level of retention in the District.

3.47 Based on this expenditure estimate, the average sales density for existing comparison sales floorspace (41,491sq.m net) is £4,806 per sq.m net. The analysis of existing comparison shopping patterns in 2013 suggests the following average sales density figures for the centres in East Herts shown in Table 3.2.

Table 3.2: Defined Centres Comparison Average Sales Densities

Centre	**Average Sales Density 2013 (£ per sq.m net)**
Hertford (including Madford Retail Park)	£3,003
Ware	£3,224
Bishop’s Stortford	£6,506
Buntingford	£2,748
Sawbridgeworth	£3,026
East Herts Average	**£4,806**

3.48 Bishop’s Stortford has a better range of higher order comparison retailers than any other centre in East Herts, reflecting its higher average sales density. The other centres have lower trading densities, that reflect the predominance of independent traders. The inclusion of Madford Retail Park will lower the average sales density of Hertford, as retail warehouse floorspace generally trades at a lower turnover density than high street shops.

3.49 There is no evidence to suggest existing comparison sales floorspace is over-trading in the District, or that there is surplus comparison expenditure available to support new development at present. Existing floorspace appears to be trading satisfactorily in difficult market conditions, particularly in Bishop’s Stortford. In the other centres in East Herts, the figures suggest retailers may be struggling and some future growth will be needed to secure their viability.

Capacity for Convenience Goods Floorspace

3.50 It is appropriate and realistic to plan to maintain the District’s market shares over the study period. Planning for a decline in market share would not be sustainable and would not address the needs of local residents. It should be noted that as the forecast increase in internet spending is taken into account in projecting available expenditure in the future, this will have the effect of reducing the actual requirement for additional floorspace. Food store commitments in the District, particularly Asda in Ware, will change shopping patterns in the future and could increase expenditure retention in the District. However, it should be noted that if the commitments do not come forward, this would release expenditure capacity.

3.51 Information has been provided by East Herts Council on major retail commitments and proposals within the District. Planning permission was granted on 26 July 2011 for a new Asda food store at Watton Road, Ware (ref. 3/10/0386/FP). The proposed development includes a store with a net sales area of 2,601 sq.m, of which 1,821 sq.m will be convenience goods floorspace. The convenience goods turnover of the store is estimated to be £24.82 million based on the company average sales density. The store's comparison goods turnover is £6.73 million.

3.52 Planning permission to extend the existing Tesco store in Herford was granted on 4 August 2010 (ref. 3/09/1282/FP). The extension to the store (351 sq.m gross) allows the internal reconfiguration of the store to create an additional 588 sq.m net sales area. We have assumed that this additional floorspace would all be convenience goods floorspace, with an expected turnover of £6.54 million.

3.53 Outline planning permission has been granted for a mixed use development comprising retail, leisure, hotel, food and drink, residential, community uses at Old River Lane, Link Road, Water Lane, Bridge Street and Barrett Lane, Bishop's Stortford (ref. 3/10/1964/OP). The scheme also includes a potential extension to the existing Waitrose store of 525 sq.m net, of which it is suggested that 446 sq.m net would be convenience goods floorspace, with an expected turnover of £5.27 million.

3.54 Full planning permission has been granted for an Aldi store at the former Lancaster Garage site, London Road, Bishop's Stortford (ref. 3/12/0977/FP). This proposed store has a net sales area of 990 sq.m, of which 824 sq.m will be convenience goods floorspace, with an expected turnover of £6.51 million.

3.55 Taking these commitments into account, future adjusted market shares are shown in Table 6 in Appendix 2.

3.56 The future level of available convenience goods expenditure at 2016, 2021, 2026 and 2031 is shown at Tables 7, 8, 9 and 10 in Appendix 2.

3.57 The total level of convenience goods expenditure available for shops in the District between 2013 and 2031 is summarised in Table 12 (Appendix 2). Convenience expenditure available to shopping facilities in the District is expected to increase from £271.49 million in 2013 to £374.78 million in 2031.

3.58 Table 12 subtracts the benchmark turnover of existing and committed floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further new development. Within the

District, there is a surplus of £4.65 million convenience goods expenditure in 2013. This surplus becomes a deficit of -£20.07 million in 2016 due to the implementation of commitments. Continued future growth produces a small surplus of £3.13 million in 2021, increasing to £32.25 million in 2026 and £64.80 million in 2031.

3.59 The surplus expenditure projections have been converted into potential new floorspace estimates at the foot of Table 12. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure, based on the average turnover of the main food supermarket operators. An average sales density of £13,000 per sq.m net has been adopted for large food stores and £5,000 per sq.m for local shops.

3.60 The capacity figures suggest commitments are sufficient to meet growth up to and beyond 2016. The surplus of available expenditure up to 2021 indicates that there is a medium term requirement for additional convenience goods floorspace in the District of 1,060 sq.m net (1,515 sq.m gross), primarily concentrated in Bishop’s Stortford and Sawbridgeworth. In the long term, surplus expenditure at 2031 could support 7,120 sq.m net of sales floorspace (10,171 sq.m gross) in the District as a whole, as shown in Table 12, Appendix 2.

3.61 The previous retail study in 2008 suggested a convenience goods floorspace requirement for the District of 2,612 sq.m net (4,353 sq.m gross) between 2008 and 2021.

Capacity for Comparison Goods Floorspace

3.62 The household survey suggests that the District’s retention of comparison goods expenditure is much lower than for convenience goods. The lower level of comparison expenditure retention is due to the strength of competing comparison goods facilities in neighbouring authorities, in particular Harlow, Stevenage and Welwyn Garden City.

3.63 Future improvements to comparison retail provision within the District could help to claw back some additional expenditure leakage from the study area. However major developments in neighbouring authorities will limit the ability of shopping facilities in the District to increase their market share of expenditure. Retail development will be necessary in East Herts in order to maintain existing market share in the future. An appropriate strategy for East Herts should be to seek to maintain existing 2013 market shares for the town centres in the face of increasing future competition, whilst maintaining the vitality and viability of centres.

3.64 We consider that it is realistic and appropriate to plan to maintain market shares. The centres within East Herts should be capable of maintaining their existing comparison market share despite retail development in nearby centres, such as planned improvements in Hatfield and Stevenage. The East Herts centres should plan to maintain their existing role, which is complementary to the higher order centres.

3.65 Major retail commitments in Bishop Stortford and Ware are likely to increase the comparison market share of these towns, whilst reducing the share of other centres. Again, it should be noted that if the commitments do not come forward, this would release expenditure capacity

3.66 The proposed Asda food store at Watton Road, Ware has an expected comparison goods turnover of £6.73 million. The mixed use development at Old River Lane, Link Road, Water Lane, Bridge Street and Barrett Lane, Bishop's Stortford could provide a maximum of 16,000 sq.m gross (or 12,800 sq.m net) of comparison goods floorspace. At 2016 this floorspace would have an expected turnover of £67.52 million. In addition, the proposed Aldi and Waitrose stores in Bishop's Stortford have an element of comparison goods floorspace.

3.67 Taking these commitments into account, future adjusted market shares are shown in Table 6 in Appendix 3.

3.68 Available comparison goods expenditure has been projected forward to 2016, 2021, 2026 and 2031 based on the adjusted penetration rates in Tables 7, 8, 9 and 10 in Appendix 3, and summarised in Table 12. Available comparison expenditure to facilities within the District is expected to increase from £199.41 million in 2013 to £414.15 million in 2031.

3.69 Future available expenditure is compared with the projected turnover of existing comparison retail is shown in Table 12 (Appendix 3). Table 12 assumes that the benchmark turnover of comparison floorspace will increase in real terms. A growth rate of 1.8% per annum is adopted, and this growth is required to maintain the health and viability of town centres. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

3.70 Within East Herts, by 2016 there will be an expenditure deficit of -£48.60 million, if commitments are implemented. This deficit reduces to -£33.20 million in 2021. By 2031, future expenditure growth generates an expenditure surplus of £39.89 million.

3.71 Surplus comparison expenditure has been converted into net comparison sales floorspace projections at the foot of Table 12 in Appendix 3, adopting an average sales density of £5,000 per sq.m in 2013, which is projected to grow by 1.8% in the future due to improved turnover efficiency. The surplus expenditure at 2031 could support 5,787 sq.m net of sales floorspace (7,715 sq.m gross).

3.72 The previous retail study in 2008 suggested a comparison goods floorspace requirement for the District of 52,009 sq.m net (74,298 sq.m gross) between 2008 and 2021. The figure for 2031 within this study update is significantly lower because of the effects of the recession on expenditure growth between

2008 and 2013 and lower future growth forecasts (ie. 2.9% growth per annum rather than 4.8% growth) and the expected implementation of commitments.

Qualitative Need for Retail Floorspace

3.73 Qualitative need can be assessed through consideration of the following factors:

- deficiencies or 'gaps' in existing provision;
- consumer choice and competition;
- overtrading, congestion and overcrowding of existing stores;
- location specific needs such as deprived areas and underserved markets; and
- the quality of existing provision.

East Hertfordshire District

3.74 Bishop's Stortford and Hertford town centres are clearly at the top of the retail hierarchy in the District in terms of the number of units and the amount of retail floorspace. Although significantly smaller, Ware also performs a key role as a market town serving its local catchment. The presence of markets in these three town centres is important to maintain the vitality and viability of the towns and in providing a key local service. The importance of markets is recognised in "The Portas Review – an independent review into the future of our high streets" (Mary Portas, December 2011). This report states:

"Markets are a fantastic way to bring a town to life. There's a market for all of us. From a bustling 'roll up, roll up' veggie market to a thriving organic middleclass farmers' market. What both these types of endeavours share is people coming together to buy, to sell, to meet, to share, to discover and enjoy each other's company. It is the oldest type of commerce. But strangely, more than any other type of retailing, I believe markets can serve as fundamental traffic drivers back to our high streets.

From food, fashion, homemade, second hand, organic, craft, gardening and flowers, car boot fairs and recycled goods; mixing up all these types of markets will bring all types of people of every age group into the town.

On a market stall people can try out their ideas and get their business booming without too much upfront cost. And it's great for our town centres too, bringing in fresh ideas and products and preserving our nation's cultural heritage to boot."

Convenience Goods Shopping

3.75 The household survey results indicate that most residents in the study area undertake both a main shopping trip and top-up shopping trips. Main shopping trips are generally made once a week or less often, and the household survey identified that 85.7% of respondents travel to do their main food shopping by car (both driver and passenger). The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large supermarkets or superstores, defined as over 2,500 sq.m net or more, are the usual destination for these types of shopping trip.

3.76 There are two food superstores (over 2,500 sq.m net) within the District, ie. Sainsbury's at Jackson Square and Tesco at Bishop's Park Centre, both in Bishop's Stortford. In addition to these superstores, there are five supermarkets (over 1,500 sq.m net) within the District, ie. Sainsbury's at Hartham Lane and Tesco at Ware Road in Hertford, Sainsbury's at Thorley Neighbourhood Centre and Waitrose at Northgate End, Bishop's Stortford, and Tesco, West Street, Ware. The household survey indicates that these large food stores are the dominant shopping destinations used by residents in the District for main/bulk food shopping.

3.77 The larger food stores are supported by a good range of smaller supermarkets and convenience stores. There is no representation from the discount food sector within East Herts, however as noted above, planning permission has recently been granted for an Aldi in Bishop's Stortford. Food stores within the District are supported by small independent convenience shops located within the main and local centres. Appendix 1 includes a Plan showing the distribution of existing food stores within the District.

3.78 The retail capacity projections set out in Table 12 in Appendix 2 suggest food store commitments in Ware and Hertford should absorb expenditure capacity up to 2026. There is surplus convenience goods expenditure at 2021 in Bishop's Stortford (£7.24 million) and Sawbridgeworth (£4.63 million). There is limited surplus convenience goods expenditure in Buntingford. There is limited short to medium term need for additional food store development in the District due the implementation of commitments.

3.79 The qualitative capacity figures suggest that the priority for long term future food store development should be within Bishop's Stortford and Sawbridgeworth. However in qualitative terms the choice of food store in Bishop's Stortford is good.

High Street Comparison Shopping

3.80 Bishop's Stortford is the main high street comparison shopping destination and the highest ranking centre within the District. Hertford and to a lesser extent Ware also provide residents with comparison shopping destinations. The smaller centres of Buntingford and Sawbridgeworth have a more limited comparison goods offer. The East Herts centres are ranked below other larger centres surrounding the District, in particular Stevenage and Welwyn Garden City, which are accessible to residents within the District and have a more extensive range of multiple retailers than Bishop's Stortford, Hertford and Ware and the other centres in East Herts.

3.81 The centre audits in Appendix 4 identify that only Bishop's Stortford has a higher proportion of comparison retail units compared with the national average. Bishop's Stortford, Hertford and Ware have a reasonable range of comparison shops including a selection of national multiples. Bishop's

Stortford has representation from all comparison goods categories within the centre, while the range is more limited in Hertford and Ware, with some categories not present or with limited choice within the categories. Buntingford and Sawbridgeworth have a small selection of comparison operators, and most are small independent traders and shops selling lower order comparison goods, such as pharmaceutical goods, charity shops and other day to day items.

Bulky Goods Retail Warehouses

3.82 The only retail warehousing within East Herts is the small Madford Retail Park in Hertford. East Herts is predominantly served by bulky goods retail warehouse units located outside of the District, at Harlow and Stevenage. Given the lack of existing retail warehousing within East Herts, there may be a qualitative need to provide for new retail warehouse development.

3.83 Any out-of-centre retail warehouse proposal would need to be considered on its individual merits. The applicant would need to clearly demonstrate that the nature of retail floorspace proposed cannot be adequately accommodated within existing centres, allowing scope for disaggregation and flexibility, and that the development would not harm designated centres.

Housing Growth Locations

3.84 In order to accommodate housing growth over the study period to 2031 a number of options have been assessed. The options are still being reviewed, and it has not yet been decided which are most likely to be progressed within housing allocation policies. The options include the potential for:

a up to 4,700 dwellings at Bishop's Stortford, including around 2,500 dwellings at Bishop's Stortford north;

b up to 2,000 dwellings at Buntingford;

c up to 1,700 dwellings at Hertford;

d 10,000 dwellings north of Harlow;

e up to 3,000 dwellings west of Sawbridgeworth;

f up to 3,000 dwellings north and east of Ware;

g up to 2,000 dwellings east of Welwyn Garden City.

3.85 The largest of these housing growth options is at Harlow North, where development of up to 10,000 new homes is being considered. If implemented, this will have implications for the distribution of retail growth within the District, and this has therefore been assessed in more detail below.

3.86 The other scenarios would clearly have implications, primarily in relation to the existing facilities within the centres closest to the growth locations. Section 5.0 of this report assesses the development options for accommodating future growth. Opportunities for further retail development are generally limited in Hertford, Ware, Buntingford and Sawbridgeworth. As such, these centres may not be able to provide an increased retail offer to support any significant increase in population in or around these centres, and this may result in further leakage to other centres further afield.

3.87 The larger growth options may generate the need for a limited amount of retail floorspace or a local centre within the growth location areas, particularly where they are less well connected to existing centres. Any planning applications submitted that include an element of retail floorspace would need to assess the appropriate scale of floorspace in the context of the needs of the new population (and adjoining areas) and the potential impact on the vitality and viability of existing centres.

Retail Potential in Harlow North

3.88 If the proposals are brought forward for major growth at Harlow North, some of the retail capacity in the District identified above will be diverted to the new residential area, where it meets the needs of local residents. The appropriate level of retail development within Harlow North has been assessed based on the methodology below:

STAGE 1: Identify the appropriate catchment area for facilities within the residential development and quantify the catchment population and expenditure per capita

STAGE 2: Project available expenditure into the future, taking into account population change, growth in average expenditure per capita and forecast changes in shopping patterns

STAGE 3: Estimate the proportion of available expenditure that will be retained in the catchment area that will be available to support retail floorspace in the proposed residential development

STAGE 4: Convert available surplus expenditure into potential new floorspace based on assumed average sales densities for new floorspace. This also seeks to provide an appropriate balance and mix of different types of retail floorspace in order to meet any qualitative deficiencies in existing provision

3.89 For the purposes of this assessment, we have considered the expenditure that could be retained by the Harlow North development, in order to estimate the floorspace requirements that would be generated by the new population.

3.90 Appendix 6 sets out a step-by-step calculation of the available expenditure and assumptions applied in estimating the retention of spending within the Harlow North residential development.

Convenience Goods Floorspace

3.91 Harlow North development could support up to three local/neighbourhood centres to ensure all residents have easy access to shops and services. Generally all residents should have at least one local centre within 500 metres walking distance.

3.92 The revised convenience goods capacity assessment in Appendix 6 suggests the Harlow North development could support 3,029 sq.m net (4,327 sq.m gross) of convenience goods floorspace by 2031.

3.93 Concentrating population growth to the north of Harlow and catering for local shopping needs within the development will marginally reduce convenience goods floorspace capacity within most other parts of the District, apart from Sawbridgeworth.

3.94 Based on the above floorspace requirements each local/neighbourhood centre could include a convenience food store of around 1,000 sq.m gross, supported by small units such as a butchers, greengrocers, newsagents etc.

Comparison Goods Floorspace

3.95 The revised comparison goods capacity assessment in Appendix 6 suggests the Harlow North development could support 1,500 sq.m net (2,000 sq.m gross) of comparison goods floorspace by 2031.

Again concentrating population growth to the north of Harlow will reduce comparison goods floorspace capacity within most other parts of the District. Each local/ neighbourhood centre could include around five comparison shops, for example chemists, florists, hardware store, optician, stationery and household goods.

Non Convenience and Comparison Goods Floorspace

3.96 The scope for Class A1 retail floorspace is approximately 6,300 sq.m gross (comparison and convenience goods). Within local/neighbourhood centres, there will be a need for non-retail services, such as a post office, hairdressers, travel agent etc. together with Class A2, A3, A4 and A5 uses. It has been assumed that the total floorspace of these units will equate to approximately 30% of the floorspace of the centre, and the combined convenience and comparison floorspace will equate to 70% of the total floorspace. On this basis, the amount of non-retail floorspace is estimated to be about 2,700 sq.m (gross).

Harlow North Total Floorspace

3.97 Based on the above assumptions, the total floorspace (Use Classes A1, A2, A3, A4 and A5) that could be supported within the Harlow North development as a whole in 2031 equates to approximately 9,000 sq.m (gross). If the floorspace is split between three local/neighbourhood centres, these would have an average floorspace of around 2,500 – 3,500 sq.m gross.

3.98 It should be noted that this figure does not include office, leisure (Class D2) or community facilities, which will also be required to provide a vibrant and successful centre.

4.0 Commercial Leisure Assessment

Introduction

4.1 This section assesses the potential for commercial leisure uses in East Herts, including cinema/multiplex, tenpin bowling, bingo, nightclubs, private health and fitness clubs, restaurants and cafés, pubs and bars.

Cinemas

4.2 There are currently two cinemas located within the District, with a total of 7 screens and 1,644 seats. In total, 77% of respondents to the household survey stated that the visit the cinema, and of these 30.7% visited cinemas in the District (of which 24.7% visited cinemas in Bishop's Stortford). 17% visited cinemas in Harlow and 16.1% visited cinemas in Stevenage.

4.3 To assess potential demand for cinema admissions within the study area, we have assumed that if further cinema provision is to be planned for within the District, it could potentially attract 60% of cinema trips in the future. This estimate is considered to be a reasonable assumption to claw back some of those visiting cinemas elsewhere, but 40% of cinemagoers will continue to visit cinemas outside of the District, based on their likely preferences and habits. The catchment population has been converted into a total number of cinema screens and seats based on the current national average (16,300 people per screen and 78 people per seat). The results are shown in Table 4.1 below.

Table 4.1 Cinema Potential in EHDC

	2013	2016	2021	2026	2031
Study area population	178,306	183,921	193,927	204,634	215,938
Market Retention	60%	60%	60%	60%	60%
Catchment potential	106,984	110,353	116,356	122,780	129,563
Cinema Screen Potential	6.6	6.8	7.1	7.5	7.9
Cinema Seat Potential	1,372	1,415	1,492	1,574	1,661

4.4 The analysis above suggests the existing cinema provision in East Herts (7 screens and 1,644 seats) is sufficient to meet existing demand in terms of the number of screens/ seat provision over the study period. There is no requirement to plan for additional cinema provision. Consideration should be given to improving the quality of the existing provision to seek to retain more visits to cinemas within the District.

Theatres

4.5 The household survey indicated that around 75% of respondents in the study area visit theatres. Theatres within Central London were the most popular destinations, attracting 45% of respondents. The theatre in Hertford attracted around 9% of visits to the theatre.

4.6 The close proximity of East Herts to London has an impact on the likely demand for theatre facilities in the district. The relatively short journey to London will help meet the district's need for high profile, national performances. There is no clear need for additional theatres in the District, however if proposals were brought forward, they would assist in improving the choice of facilities in East Herts.

Health and Fitness Clubs

4.7 There are a number of health and fitness clubs within the District including:

1. Fanshawe Pool and Gym, Ware;
2. Grange Paddocks Leisure Centre, Bishop's Stortford;
3. Hartham Leisure Centre, Hertford;
4. Leventhorpe Pool and Gym, Sawbridgeworth;
5. Ward Freman Pool, Buntingford;
6. Crossfit, Hertford;
7. Results Fast, Ware;
8. Challenge, Bishop's Stortford; and
9. Nuffield Health Fitness & Well Being Centre, Hertford.

4.8 In total, East Herts District has 9 public and private health clubs. The household survey indicates that 33% of respondents or their families visit a health/fitness club, and of these 64% did so at destinations within the District.

4.9 Approximately 80% of the population of the District is adult (aged 16 and over), which would equate to approximately 142,000 of the study area population in 2013. This could generate demand for about 17,000 public and private membership places, based on the national average membership rate (12%). If 64% of these membership places are retained in the District then the 9 identified health and fitness clubs attract 10,900, which implies an average of around 1,200 members per club, compared with the national average for private fitness clubs (1,375 members). This suggests there is a slight over-provision of health club facilities.

4.10 The adult population within the East Herts study area is expected to increase by about 30,000 between 2013 and 2031, which would generate around 3,600 new health club members, of which 2,300 (64%) could be retained in the District. This growth could support one or two new health and fitness clubs in the District.

Tenpin Bowling

4.11 There is one tenpin bowling centres in the District, 1st Bowl in Bishop's Stortford which has 8 lanes. Other nearby bowling facilities include Harlow Bowl, Harlow and Hollywood Bowl in Stevenage,

4.12 The household survey results suggest that about 32% of households in the study area visit tenpin bowling facilities, and of those who visit bowling facilities mainly go to the Stevenage Hollywood Bowl (15%), followed by First Bowl in Bishop's Stortford (12%). The study area population (around 178,000 in 2013) as a whole could theoretically support 15 lanes, based on the national average one lane per 12,000 people. The population in 2031 (216,000) could support 18 lanes.

4.13 It may be reasonable to assume the District can retain at least 60% of tenpin bowling trips within the study area, which could support 11 lanes in 2031. There are 8 lanes within the District, and therefore appears to be limited potential for further tenpin bowling facilities within the District. The proximity of facilities in nearby higher order centres, which are generally combined with other leisure attractions, may affect the viability of further facilities within EHDC.

Bingo

4.14 Mecca and Gala are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose built units. Bingo clubs have become increasingly sophisticated, and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators require buildings of between 2,000 - 3,000 sq.m, capable of seating up to 2,000 people, with a catchment population of 50,000 to 70,000 within freestanding towns (source: BISL).

4.15 The household survey results indicated that 5% of households in the study area visit bingo facilities, of which 47% visited the Mecca Bingo in Harlow, and 25% visit the Mecca Bingo in Stevenage. This 5% figure is comparable with the national average visitation rate.

4.16 There are currently no bingo facilities within the District. The East Herts study area population (about 142,000 adults, 2013) could generate about 249,000 admissions based on the national participation rate (1.75 per adult). Based on national average figures (113,000 admissions per club), the East Herts study area could support two bingo facilities. However the existing bingo provision around East Herts in Stevenage and Harlow suggests there is limited demand for additional facilities. There is no clear need to plan for the provision of new bingo facilities in the District.

Bars and Restaurants

4.17 Food and drink establishments (Class A3, A4 and A5) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks and are important services within town centres. National information available from Experian Goad indicates that the proportion of non-retail uses within town centres across the country has increased over the last decade as shown in Table 4.2.

Table 4.2 GB Goad Plan Town Centres Use Class Mix

Type of Unit	% Change 2000-2012	Proportion of Total Number of Units (%)			
		2000	2005	2009	2012
Class A1 (Retail)	- 15.4	59.1	56.4	54.0	50.0
Class A1 (Services)	+ 31.7	8.2	9.6	9.8	10.8
Class A2	- 4.5	8.9	8.9	9.0	8.5
Class A3/A5*	+ 41.1	11.2	13.7	14.5	15.8
Miscellaneous	- 14.3	1.4	1.4	1.3	1.2
Vacant/under Const.	+ 22.3	11.2	10.1	11.4	13.7
Total	**-**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Experian Goad Centre Reports *excludes Bars/ Public Houses (A4)

4.18 Whilst the proportion of Class A1 retail uses in Goad town centres has decreased by 15% between 2000 to 2012 (9.1 percentage points), Class A3/A5 uses have increased. Growth in Class A3 to A5 uses within town centres may continue in the future, and will compete for shop premises with other town centre uses. A balance between Class A1 and Class A3 to A5 uses needs to be maintained. The mix of uses in the District is shown in Table 4.3.

Table 4.3 EHDC Town Centres Use Class Mix

Type of Unit	Proportion of Total Number of Units (%)				
	Hertford	Ware	Bishop's Stortford	Buntingford	Sawbridgeworth
Class A1 (Retail)	43.8	41.0	49.8	52.1	46.9
Class A1 (Services)	17.9	15.4	13.1	19.6	18.2
Class A2	8.3	12.2	10.2	8.7	13.6
Class A3-A5	15.8	19.2	14.1	17.4	10.6
Vacant/ under const.	14.2	12.2	12.7	2.2	10.6
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

4.19 The proportions of Class A3/A5 within Hertford, Ware and Buntingford is marginally higher than the national average. There is lower provision in Bishop's Stortford and Sawbridgeworth.

4.20 The retail floorspace projections in Section 4 relate to Class A1 retail uses. Based on the typical composition of centres, it is reasonable to assume there will be scope for a further 20% floorspace that could be occupied by Class A3 to A5 uses.

4.21 The Class A1 retail floorspace projection up to 2031 over and above commitments is around 19,000 sq.m gross. If a further 20% is allocated for Class A3 to A5 uses then around 4,800 sq.m gross of A3-A5 floorspace could be required over the plan period.

4.22 Given the relatively low proportion of Class A3/A5 uses in some centres, it may be appropriate to adopt a more flexible approach towards uses that will complement the retail offer of the town centres.

Conclusions

4.23 The assessment of commercial leisure uses in East Herts District considers the existing provision and whether there are any deficiencies in provision that need to be addressed. The assessment considers provision within East Herts District against national averages/standards.

4.24 The commercial leisure assessment concludes:

- there are currently two cinema facilities within the District, which are sufficient to meet demand over the plan period;
- there is no clear need for additional theatres in the District.
- there could be scope for one or two additional health and fitness clubs in the District over the plan period;
- there is limited potential for additional tenpin bowling facilities within the District;
- although there are currently no bingo facilities within East Herts, the existing bingo provision around the District suggests there is limited demand for additional facilities;
- the proportion of Class A3/A5 uses is higher in Hertford, Ware and Buntingford than the national average, and lower in Bishop's Stortford and Sawbridgeworth. It is important to maintain a reasonable proportion of these uses in all centres and additional floorspace should be provided over the plan period.

5.0 Strategy for Accommodating Growth

Floorspace Projections

5.1 The floorspace projections set out in the previous sections assume that new shopping facilities within East Herts can maintain their current market share of expenditure within the study area, recognising that other competing centres will improve in the future. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- major retail developments in competing centres;
- the re-occupation of vacant retail floorspace;
- the availability of land to accommodate new development;
- the reliability of long term expenditure projections;
- the effect of internet/home shopping on the demand for retail property;
- the level of operator demand for floorspace in East Herts;
- the likelihood that East Herts' existing market share of expenditure will change in the future in the face of increasing competition;
- the potential impact new development may have on existing centres.

5.2 Projections up to 2021 are realistic and are based on up to date forecasts, which take into account the effects of the recession. The long term floorspace projections (up to 2026 and beyond) should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development management decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under-review.

5.3 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading have been excluded. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. The impact of internet growth on the demand for retail floorspace is unclear. Some retailers' home delivery and internet services utilise existing stores rather than warehouses, for example Tesco Direct. Growth in internet sales will not always reduce the demand for shop floorspace. In addition, some of the growth in internet sales may divert trade away from mail order companies rather than retail operators. Overall the long term impact of home shopping on expenditure projections is uncertain.

5.4 The quantitative and qualitative assessment of the potential for new retail floorspace within the previous sections suggests there is scope for new retail development within East Hertfordshire, over and above commitments during the Plan period (to 2031). This section examines the opportunities for accommodating this projected growth and assesses potential to accommodate this floorspace.

5.5 The projections up to 2031 suggest there is a requirement over and above commitments for 10,171 sq.m net of convenience goods floorspace and 7,715 sq.m gross of comparison goods floorspace.

5.6 These projections relate to Class A1 retail uses only. There should also be scope for around 20% of additional floorspace that can be occupied by Class A2 to A5 uses and Class A1 non-retail services. Table 5.1 below summarises the floorspace requirements by centre in 2031, over and above commitments.

Table 5.1: Summary of floorspace requirements with commitments, 2031 (sq.m gross)

Centre	A1 Conv	A1 Comp	Service Uses	Total
Hertford	464	3,919	1,096	**5,479**
Ware	793	855	412	**2,060**
Bishop's Stortford	3,957	2,025	1,496	**7,478**
Buntingford	603	307	227	**1,137**
Sawbridgeworth	1,793	254	512	**2,559**
Other East Herts	2,561	354	729	**3,644**
East Herts Total	**10,171**	**7,715**	**4,472**	**22,358**

Source: Tables 11 and 12, Appendix 2 and Tables 11 and 12, Appendix 3

Accommodating Future Growth

5.7 The sequential approach suggests that designated town centres should be the first choice for retail and leisure development. In accommodating future growth, the following issues should be taken into consideration:

- What is the locational area of need the development seeks to serve and what existing centre could potentially fulfil the identified area of need?
- Is the nature and scale of development likely to serve a wide catchment area?
- Is a site available in one of the designated centres, including vacant premises and will this site meet the identified need?
- If the development has a more localised catchment area, is a site available in a local centre and will this site meet the identified need?

5.8 All development should be appropriate in terms of scale and nature to the centre in which it is located.

5.9 The existing stock of premises will have a role to play in accommodating projected growth, after the recession. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. For comparison goods, a growth rate of 1.8% per annum is assumed. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

5.10 There are 97 vacant shop units within the five centres of Hertford, Ware, Bishop's Stortford, Buntingford and Sawbridgeworth, which equates to an overall vacancy rate of 12.3%, which is just below the Goad national average (13.7%). The vacancy rate is highest in Hertford at 14.2% and is particularly low in Buntingford (2.2%). The total amount of vacant floorspace is approximately 12,800 sq.m gross (about 9,000 sq.m net).

5.11 Vacant premises should help to accommodate future growth in Bishop's Stortford, Hertford and Ware. As a target, the current vacancy level in these three town centres could fall to 8%, i.e. around the pre-recession national average. If this reduction in vacancy rate is achieved then the number of reoccupied units would be 15 re-occupied units in Hertford, 13 units in Bishop's Stortford and 6 units in Ware. The reoccupation of 34 vacant units could accommodate about 4,500 sq.m gross (3,200 sq.m net) of Class A1 to A5 floorspace. Based on existing vacancy levels, this potential re-occupied space could be distributed as follows:

- **Hertford**: 2,000 sq.m gross (1,400 sq.m net)
- **Bishop's Stortford**: 1,700 sq.m gross (1,200 sq.m net)
- **Ware**: 800 sq.m gross (600 sq.m net)

5.12 If this reduction in vacant units can be achieved, then the overall Class A1 to A5 floorspace projection up to 2031 would reduce from 22,358 sq.m gross (Table 6.1 above) to 17,858 sq.m gross. Many of the existing vacant units are generally small and in secondary locations. These units may not be attractive to retailers seeking modern units. It may be more likely that the vacant units would be reoccupied for non A1 retail uses, and we consider that the Council should take a flexible approach to application for the change of use of vacant retail units in secondary area where this could improve activity and investment in the town centres.

Development Opportunities

Hertford Town Centre

5.13 Within Hertford town centre, development options appear to be limited.

5.14 The recently developed Sainsbury's store on Hartham Lane includes parts of the McMullen's Brewery site, a former employment site to the north of Hertford town centre. The application was determined at appeal, and the Inspector concluded that there were no sequentially preferable sites that could accommodate the proposed development within Hertford. There may be longer term development opportunities if some employment land can be released for retail purposes, for example the remainder of the McMullens Brewery site. The Council would need to be satisfied that the release of employment land would be acceptable in terms of the findings and conclusions of the employment study, and a balanced assessment of priorities for the town centre would need to be made.

5.15 Windfall opportunities may become available, however these are likely to be small scale, such as the vacant garage site between North Road and Hertingfordbury Road. The town centre is constrained by the historic street layout and residential areas, and there are limited opportunities to extend the centre. The future focus for the primary shopping area is likely to be small scale intensification and extensions.

Ware Town Centre

5.16 As set out above, if the Asda development comes forward, there is very limited requirement for a small amount of additional comparison goods floorspace within Ware, and we do not consider that it is necessary to identify development opportunities. In any event, we consider that development options in the town centre are limited. However, if the Asda scheme does not come forward, there would be a need to provide additional retail floorspace in Ware, most likely beyond the town centre boundary.

5.17 If significant additional population growth is to be accommodated at Ware, given the limited development opportunities within the town centre, there may need to be additional retail provision within the population growth area to meet the needs of new residents and prevent leakage elsewhere.

Bishop's Stortford Town Centre

5.18 The Old River Lane redevelopment within Bishop's Stortford will provide a significant level of new, predominantly comparison goods retail floorspace, absorbing much of the identified capacity. The assessment does identify a need for further convenience goods retail floorspace over the study period.

5.19 Within the defined primary and secondary retail frontages, there are limited opportunities for development. We consider that the Goods Yard has the potential to accommodate further retail development within Bishop's Stortford, and could absorb any residual capacity following the development of the Old River Lane scheme.

Buntingford

5.20 Within Buntingford, development options appear to be limited, unless the Co-op food store and car park site are redeveloped. The future focus is likely to be small scale intensification and extensions.

Sawbridgeworth

5.21 Within Sawbridgeworth, development options appear to be limited, and the future focus is likely to be small scale intensification and extensions. The centre is constrained by surrounding residential uses. As set out below, we consider that some of the floorspace capacity identified for Sawbridgeworth should be directed to the growth location at Harlow North.

Harlow North Growth Location

5.22 The potential residential development at Harlow North, comprising 10,000 new homes, could generate a requirement for around 3,000 sq.m net convenience goods floorspace, 1,500 sq.m net comparison goods floorspace and 1,900 sq.m net of non-retail service uses by 2031. This is based on the assumption that the development would seek to include retail provision to meet the day to day needs of local residents. This would absorb some of the retail capacity in other parts of the District. If taken forward it would be appropriate to direct some of the floorspace requirements for the rest of District to the Harlow North development.

5.23 If the residual floorspace requirements for East Herts cannot be accommodated within the main centres above, there may be scope to provide a larger centre within the growth location at Harlow North.

6.0 Review of Centre Boundaries and Frontages

Introduction

6.1 This section reviews shopping frontage and boundary policy options within East Herts.

6.2 Saved policies within the adopted East Herts Local Plan Second Review (April 2007) include a number of policies relating to shopping within the town centres. The Local Plan defined Primary and Secondary Shopping Frontages in Hertford, Bishop's Stortford and Ware, and Shopping Frontages in the smaller centres of Buntingford, Sawbridgeworth and Stanstead Abbotts. The Plan did not define Primary Shopping Areas or Town Centre boundaries.

6.3 The Local Plan policies sought to direct retail and other key town centre uses to town centres followed by edge of town centre sites, consistent with the sequential approach (policy STC1). However, in the absence of a defined town centre boundary shown on the Proposals Map, this policy is open to interpretation. The policies also resisted the loss of Class A1 retail uses within the Primary Shopping Frontages of Hertford, Bishop's Stortford and Ware (policy STC2) and limited the non-retail uses within the Secondary Shopping Frontages (policy STC3). Policy STC4 encouraged a range of town centre uses and restricted the loss of Class A1 uses in the Shopping Frontages of the smaller centres.

6.4 The emerging policies within the East Herts District Plan will need to define Primary Shopping Areas and Town Centre Boundaries for Hertford, Bishop's Stortford and Ware, and centre boundaries for the smaller centres of Buntingford and Sawbridgeworth. Emerging policies also need to distinguish between the Primary Shopping Area (PSA) and the Town Centre in terms of the location of different town centre uses, ie. retail use should be directed to the PSA, while other uses such as offices, hotels and leisure, would be appropriate within the wider town centre.

Methodology

6.5 In undertaking this review, consideration has been given to definitions of the town centre, primary shopping area and primary and secondary frontages contained in the NPPF. In addition, consideration has been given to relevant national guidance contained in the Practice Guidance on Need, Impact and the Sequential Approach (December 2009) (Practice Guidance) and remains in force.

6.6 As advised in the NPPF (Annex 2) and Practice Guidance (paragraph 6.4), key factors in identifying the extent of the primary shopping area, and primary and secondary frontages comprise:

- Composition of uses: the proportion of retail uses within the frontage based upon the GOAD surveys of the town centres. Primary shopping frontages would comprise higher proportions of A1 retail uses than secondary shopping frontages;
- Prime rental levels: analysis of Zone A rental levels of units within the centres sourced from Valuation Office (VOA) website, with primary shopping frontages expected to achieve higher rental levels than the secondary frontages;
- Pedestrian flows: level of pedestrian flows within particular areas / frontages of the centre identified from visits to the centre, with the highest pedestrian flows in the primary shopping frontage;
- Key anchor stores: the presence of key anchor stores such as department stores or food stores can also identify the extent of the Primary Shopping Area and key frontages.

6.7 Annex 2 of the NPPF provides definitions of these designations, as follows:

Town centre*: Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.*

Primary shopping area*: Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).*

Primary and secondary frontages*: Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.*

Primary Shopping Areas and Centre Boundaries

6.8 The designation of primary shopping areas or centre boundaries is important when applying the sequential approach and directing town centre uses to appropriate locations.

6.9 The NPPF requires planning policies to be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. This includes defining the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres and allocating suitable sites for retail and other main town centre uses.

6.10 The NPPF indicates that the first preference for retail uses should be the primary shopping area, which will comprise the primary frontages and the secondary frontages that are contiguous with the primary frontages. The first preference for leisure uses is normally the wider defined town centre, which usually includes the primary shopping area and other parts of the centre.

6.11 We note that the 2008 East Herts Retail and Town Centres Study recommended town centre boundaries for Hertford, Bishop's Stortford and Ware, as shown in Figures 6.1 to 6.3 below. Hertford, Bishop's Stortford and Ware have adjoining areas that include leisure, business and other town centre uses that extend beyond the main shopping areas. On this basis, these are appropriate areas to form the definition of the town centre boundaries in emerging District Plan policies. However, as the suggested town centre boundaries extend beyond the main shopping areas of the centres, there is a requirement to define the primary shopping area. For the centres of Hertford, Bishop's Stortford and Ware, the primary shopping area should be tightly drawn around the designated primary and secondary shopping frontages, and policies should make clear that the designated PSA is the appropriate and sequentially preferable location for retail development. In Bishop's Stortford, the primary shopping area should also include the approved development at Old River Lane.

Figure 6.1: East Herts Retail and Town Centres Study, 2008 – Suggested Bishop's Stortford Town Centre Boundary

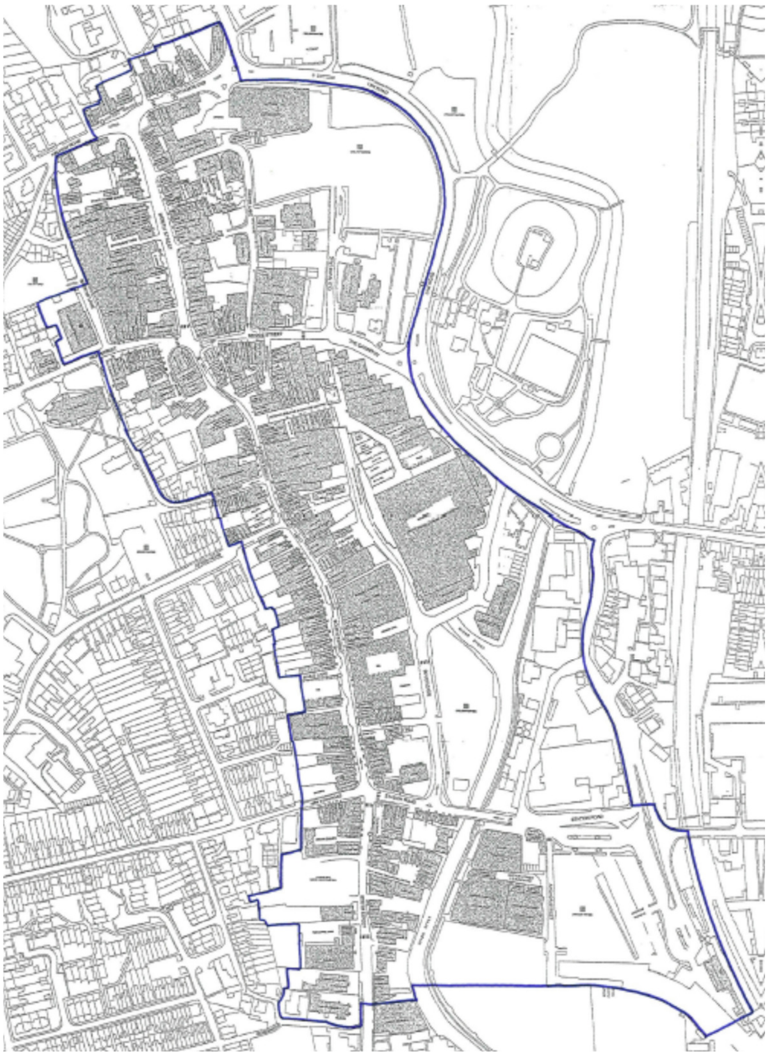
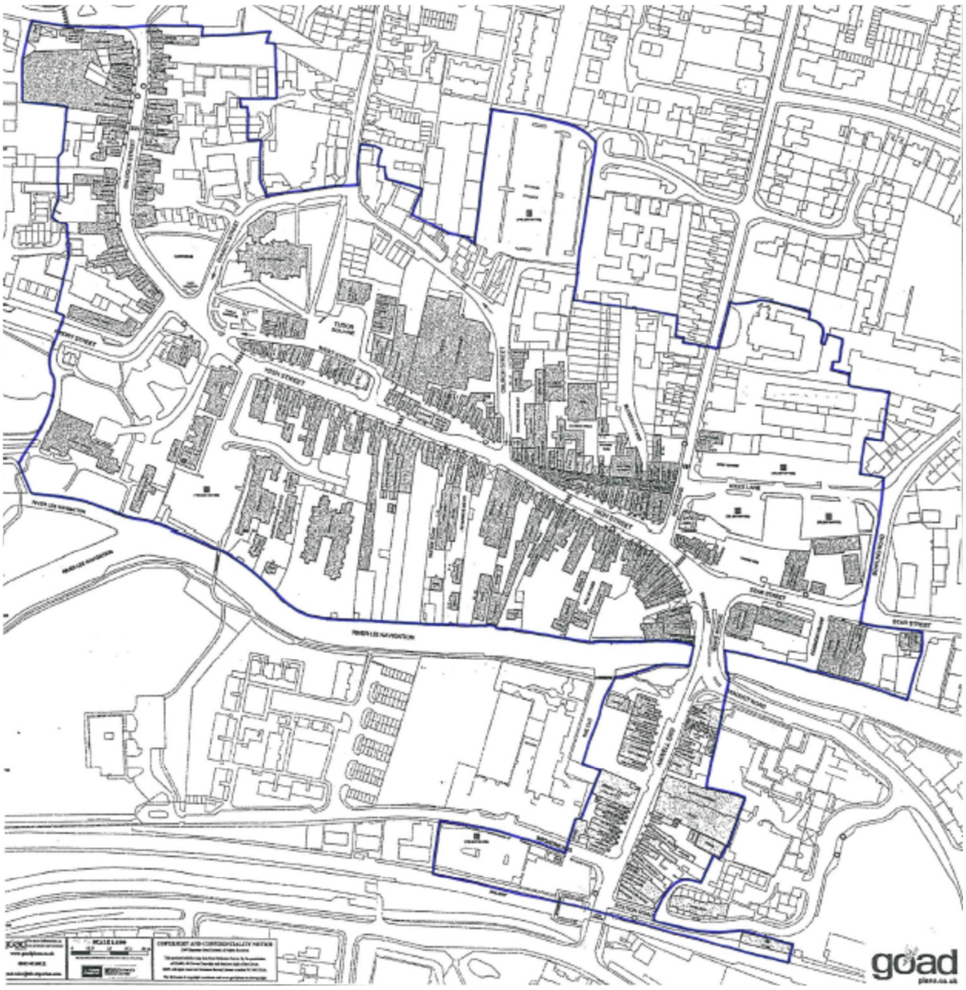


Figure 6.2: East Herts Retail and Town Centres Study, 2008 – Suggested Hertford Town Centre Boundary

Figure 6.3: East Herts Retail and Town Centres Study, 2008 – Suggested Ware Town Centre Boundary



6.12 The 2008 East Herts Retail and Town Centres Study also recommended town centre boundaries for Buntingford and Sawbridgeworth, however we consider that these suggested boundaries were too widely drawn. These smaller centres are predominantly surrounded by residential uses and do not have significant adjoining areas with other main town centre uses that extend significantly beyond the primary shopping areas. In these two centres, the town centre boundary should be tightly drawn around the commercial properties, ie. those that are designated as retail frontages. Supporting text to new policies should make clear that designated shopping frontages in these centres constitute the town centre boundary.

6.13 Emerging policy should indicate that the first preference for the main town centre uses will be the Primary Shopping Areas (ie. the combined primary and secondary frontages) within the town centres of Hertford, Bishop's Stortford and Ware, and within the town centre boundaries in Buntingford and Sawbridgeworth, and that development outside of these areas will need to comply with the sequential approach and impact tests as set out in the NPPF.

6.14 We consider that it would be appropriate to define boundaries for all the local centres and parades, as identified in the East Herts Local Plan 2007. These boundaries would define the extent of the local centre. Given the small scale of the centres, it would not be appropriate to define primary shopping areas.

Primary and Secondary Shopping Frontages

6.15 The existing primary and secondary shopping frontages for Hertford, Ware and Bishop's Stortford are defined on the East Herts adopted Local Plan (2007) Proposals Maps and listed in Appendix III. The Local Plan also defines "shopping frontages" for the smaller centres of Buntingford and Sawbridgeworth.

6.16 Development plans may distinguish between primary and secondary frontages in town centres and consider their relative importance to the character of the centre. Primary frontages are characterised by a high proportion of retail uses, while secondary frontages are areas of mixed commercial development. However, the definition of primary and secondary frontages may not just relate to the presence of retail units.

6.17 The NPPF does not suggest that shopping frontage policies must be adopted in all town centres. However, a *laissez faire* approach in East Herts could result in the deterioration of shopping frontages and could undermine their role as shopping centres. This approach could lead to a significant increase in the proportion of non-shop uses. The emergence of a large number of vacant premises within shopping frontages may be the only circumstances where this approach could be appropriate. While the number of vacant units within increased in all centres except Buntingford, there are limited concentrations of vacant units, and there is no need to relax shopping policies in order to encourage non-Class A1 to reoccupy vacant units or to regenerate rundown areas.

6.18 In our view frontage policies are still required in East Herts to maintain the appropriate mix of town centres, in order to maintain the vitality and viability of centres and prevent adverse impacts on residential amenity.

6.19 However, a ban on changes of use from Class A1 across frontages would not promote diversity and could stifle investment, which would be potentially damaging to the vitality and viability of centres. In secondary shopping areas the introduction of more restrictive shop frontage policies may be inappropriate as it could lead to an increase in vacant units, because demand for Class A1 retail occupiers is unlikely to be as strong within peripheral parts of the town centres. In addition there is no evidence that suggests the town centres in East Herts have a harmful or disproportionately high level of non-shop uses at present.

6.20 In our view the designation of primary and secondary frontages remains an appropriate approach in Hertford, Bishop’s Stortford and Ware. We believe that a clear policy should be considered relating to these frontages. The wording of this policy should provide sufficient flexibility to allow non-retail uses to secure representation in town centres, where the proposed use would not be harmful to the town centres vitality and viability or residential amenity.

6.21 In Buntingford and Sawbridgeworth, there are no obvious areas where there is a predominance of Class A1 retail use and a single frontage area should continue to be defined. We would suggest that in Sawbridgeworth, the frontage area, and consequently the town centre boundary, should be extended to include 13-19 Bell Street, the Budgens store and 28 London Road.

Primary Frontages

6.22 We believe that the Council should continue to protect against the loss of ground floor Class A1 retail uses within designated primary frontages. However, if the policy is to be defensible then the primary frontages should be appropriately drawn, and should not include areas where Class A1 use is not the predominant use or where some degree of flexibility and diversification would be acceptable.

6.23 The emerging District Plan shopping policies currently suggest no flexibility on non-A1 retail uses within the Primary Shopping Frontages. We consider that this policy approach is too restrictive, and suggest it may be more appropriate to define a percentage of non-A1 uses that may be acceptable. Based on our experience across the country, the typical maximum proportion of non-A1 use allowed within primary shopping frontages usually ranges from 20% to 30%.

6.24 Based on the current mix of uses, the extent of the primary frontages and shop vacancies within primary frontages, a 20% limit in any given frontage appears reasonable for Hertford, Bishop’s Stortford and Ware.

6.25 The primary shopping frontages are relatively tightly drawn within the core shopping areas of Hertford, Bishop’s Stortford and Ware. We have reviewed the existing primary shopping frontages in the centres, and suggest the following minor amendments.

6.26 **Hertford** – the frontages are considered to be appropriate and no changes are proposed.

6.27 **Bishop's Stortford** – the primary shopping frontage should be extended to include the extended Jackson Square development.

6.28 **Ware** – the frontages are considered to be appropriate and the only change proposed is the exclusion of the library from the primary shopping frontage.

Secondary Frontages

6.29 We believe that the Council should continue to designate secondary frontages, where policy provides a more flexible approach to changes of uses.

6.30 The emerging District Plan shopping policies currently refer to the acceptability of a range of town centre uses, provided that this does not lead to an over-concentration of non-A1 uses. It would be useful for the policy or supporting text to provide some clarity on what is considered to be an "over concentration" (ie. a percentage/number of units in a row). The supporting text to the adopted Local Plan policy suggests that as a general guideline, proposals that result in fewer than 50% of ground floor premises in a continuous frontage in shop use would not be favoured. The 50% limit in any given frontage appears reasonable for all three town centres, which will prevent clusters of non-retail use, whilst still maintaining some control on the overall predominance of Class A1 use within the secondary frontages as a whole.

6.31 The extent of the secondary shopping frontages in Hertford and Ware appear reasonable. In Bishop's Stortford, we suggest the secondary shopping frontage should be extended to include Northgate End and Waitrose as this frontage comprises a high proportion of A1 retail units and adjoins the primary shopping frontage.

7.0 Conclusions and Policy Recommendations

Introduction

7.1 This report provides an update of the District wide needs assessment for retail and leisure development in East Herts. The principal conclusions of the analysis contained within this study are summarised below.

Meeting Shopping Needs in East Herts

7.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development over the plan period up to 2031.

7.3 When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

7.4 Long term forecasts up to and beyond 2026 may be more susceptible to change, due to unforeseen circumstances. Long term projections should be monitored and kept under review. The implications of major retail development within and surrounding the District should be monitored along with the effect proposals may have on the demand for additional development in East Herts.

Retail Floorspace Projections

7.5 The quantitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new retail development within East Herts. The projections suggest new floorspace (over and above commitments) should be distributed as follows:

Table 7.1: Convenience Goods Retail Floorspace Projections (Net Sales)

Location	Existing Commitments sq.m net	Additional Retail Sales Floorspace sq.m net			
		2013 - 2021	2021 - 2026	2026 - 2031	Total 2013 - 2031
Hertford	588	0	0	300	**300**
Ware	1,821	0	200	400	**600**
Bishop's Stortford	1,288	600	1,000	1,200	**2,800**
Buntingford	-	0	200	200	**400**
Sawbridgeworth	-	900	200	100	**1,200**
Other East Herts	-	400	600	800	**1,800**
East Herts Total	**3,696**	**1,900**	**2,200**	**3,000**	**7,100**

Table 7.2: Comparison Goods Retail Floorspace Projections (Net Sales)

Location	Existing Commitments sq.m net	Additional Retail Sales Floorspace sq.m net			
		2013 - 2021	2021 - 2026	2026 - 2031	Total 2013 - 2031
Hertford	-	700	1,100	1,100	**2,900**
Ware	780	0	100	500	**600**
Bishop’s Stortford	13,027	0	0	1,500	**1,500**
Buntingford	-	100	0	100	**200**
Sawbridgeworth	-	100	0	100	**200**
Other East Herts	-	100	100	100	**300**
East Herts Total	**13,659**	**1,000**	**1,300**	**3,400**	**5,700**

7.6 The floorspace projections in Tables 7.1 and 7.2 take into account commitments, assuming that these will have come forward by 2021, but not the potential re-occupation of vacant floorspace.

Non-Retail Uses

7.7 It is important to maintain a range of non-retail uses within centres, and where there are deficiencies, plan to improve the overall offer of the centre. In Bishop’s Stortford and Sawbridgeworth, there is a potential need for additional non-retail (Class A3-A5) uses, in order to complement the retail focus of the centres.

7.8 In terms of commercial leisure uses, there is not clear need to plan for additional commercial leisure facilities such as a cinema, tenpin bowling and bingo facilities. Our assessment has identified that there is a requirement to provide one or two additional health and fitness club in the study area to meet the demand from existing residents.

Employment Creation

7.9 If the floorspace requirement identified in this Study is provided over the study period, it will generate a significant number of new jobs by 2031. Table 7.3 provides estimates of the potential job creation, applying average employment densities based on the 2010 Employment Densities Guide produced by the Homes & Communities Agency and Offpat.

Table 7.3: Potential Employment Creation, 2031

Requirements/ Commitments	sq.m gross	Total jobs ratio	Number of Jobs	FTE jobs ratio	Number of FTE Jobs
Convenience Floorspace	10,171	1 job per 14 sq.m	727	1 job per 20 sq.m	509
Comparison Floorspace	7,715	1 job per 16 sq.m	482	1 job per 22 sq.m	351
Service Uses	4,472	1 job per 16 sq.m [1]	280	1 job per 20 sq.m [1]	234
Convenience Commitments [2]	8,939	1 job per 14 sq.m	639	1 job per 20 sq.m	447
Comparison Commitments [3]	16,000	1 job per 16 sq.m	1,000	1 job per 22 sq.m	727
Total	**47,297**	**-**	**3,128**	**-**	**2,268**

Note: [1] Average applied for restaurant uses (1 job per 15 sq.m/1 FTE job per 21 sq.m) and Class A2 financial/professional (1 job per 17 sq.m/1 FTE job per 19 sq.m

[2] Convenience commitments include Asda at Ware (6,753 sq.m gross), Tesco extension, Hertford (351 sq.m gross), Waitrose extension, Bishop’s Stortford (525 sq.m gross) and Aldi, Bishop’s Stortford (1,310 sq.m gross)

[3] Comparison commitment comprises Old River Lane, Bishop’s Stortford

7.10 The retail floorspace requirements and commitments combined could generate 3,128 direct jobs in East Herts by 2031. The potential FTE (full time equivalent) job creation is 2,268 jobs. The difference between the number of actual jobs created and the FTE is due to the relatively high proportion of part time jobs in retail and service uses. It should be noted that there will be some amount of job displacement from the existing facilities to new floorspace. However, as this estimate of job creation relates to direct jobs only, based on the amount of floorspace proposed, there will be further indirect jobs created associated with the retail and service uses.

Strategy Recommendations

Hertford Town Centre

7.11 There is limited retail capacity for additional convenience goods facilities in Hertford, if the Tesco extension and Asda commitment in Ware are implemented. There is more emerging potential to improve comparison goods shopping facilities, 2,900 sq.m net (3,900 sq.m gross) by 2031.

7.12 Vacant shop units within the town centre could accommodate about half of this projection. The short to medium term priority should be the reoccupation of vacant shop units and small infill development in Hertford.

7.13 In the longer term the release of edge of centre employment land for retail use could be considered, for example the remainder of the McMullen's Brewery site.

7.14 If population growth is concentrated to the north of Harlow then the comparison goods projection in Hertford could reduce to 1,600 sq.m net (2,200 sq.m gross) by 2031.

Ware Town Centre

7.15 If the Asda commitment is implemented this will increase Ware's market share of expenditure. There will be limited potential for additional convenience or comparison goods floorspace over and above this commitment.

7.16 The priority in Ware should be the implementation of the Asda commitment, and the reoccupation of vacant shop units and small infill development in the town centre. If significant additional population growth is to be accommodated at Ware, there would need to be additional retail provision, which may not be capable of being accommodated within the town centre.

Bishop's Stortford Town Centre

7.17 There is retail capacity for additional convenience goods facilities in Bishop's Stortford, over and above commitments of 2,800 sq.m net (4,000 sq.m gross). This growth could support an additional food superstore during the period 2021 to 2026.

7.18 If population growth in concentrated to the north of Harlow and retail facilities are provided within this development, then the convenience goods projection in Bishop's Stortford could reduce to 1,500 sq.m net (2,100 sq.m gross) by 2031. This figure suggests there may still be scope for a large food store in the latter part of the plan period.

7.19 The Old River Lane redevelopment within Bishop's Stortford, if implemented, will provide a significant level of new comparison goods retail floorspace, absorbing much of the identified retail capacity in Bishop's Stortford up to and beyond 2026. Between 2026 and 2031 there could be scope for 1,500 sq.m net (2,000 sq.m gross) over and above commitments.

7.20 Vacant shop units within the town centre could accommodate about 1,200 sq.m net (1,700 sq.m gross). There is limited need to identify additional development sites for comparison goods retailing in Bishop's Stortford for the foreseeable future.

7.21 The priority should be the reoccupation of vacant shop units and implementation of the Old River Lane development in Bishop's Stortford. The Goods Yard has the potential to accommodate further retail development within Bishop's Stortford, and could absorb any residual capacity following the development of the Old River Lane scheme.

Buntingford

7.22 The retail floorspace projections in Buntingford is 600 sq.m net (900 sq.m gross by 2031. Within Buntingford, development options and vacant premises appear to be limited, unless the Co-op food store and car park site is redeveloped. The future focus is likely to be small scale intensification and extensions.

Sawbridgeworth

7.23 The retail floorspace projection in Sawbridgeworth is 1,400 sq.m net (2,000 sq.m gross) by 2031.

7.24 Within Sawbridgeworth, development options and vacant premises appear to be limited, and the future focus is likely to be small scale intensification and extensions. The centre is constrained by surrounding residential uses.

Harlow North Growth Location

7.25 If major residential development is taken forward at Harlow North, then retail facilities should be provided within the development to meet the day to day needs of local residents. This would absorb some of the retail capacity in other parts of the District. If taken forward it would be appropriate to direct some of the floorspace requirements for the rest of District to the Harlow North development.

Large Villages

7.26 Large villages with projected population growth could also assist in accommodating growth particularly top-up food shopping and day to day comparison goods. Opportunities for small convenience stores (100 to 200 sq.m net) could be considered.

Scale of Retail Development

7.27 Development should be appropriate in terms of scale and nature to the centre in which it is located.

7.28 The NPPF states that, when assessing applications for retail, leisure and office development outside of town centres which are not in accordance with an up to date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold. If there is no locally set threshold, the default threshold is 2,500 sq.m gross.

7.29 The CLG Practice Guidance states (para. 7.5) that where authorities decide not to set out specific floorspace thresholds in local development plans, national policy requires impact assessments to be submitted for retail and leisure developments over 2,500 sq.m gross. The Guidance acknowledged that it may occasionally also be relevant to consider the impact of proposals below this threshold, for example if they are large compared to a nearby centre, or likely to have a disproportionate effect or ‘tip the balance’ of a vulnerable centre.

7.30 If the NPPF threshold was adopted, then a single development proposal could exceed the entire short to medium term floorspace projections for the District without the need for a retail impact assessment. Proposals that significantly exceed the floorspace projections for each town will reduce the turnover of existing floorspace and this impact should be carefully tested on a case by case basis.

7.31 We therefore consider a 2,500 sq.m gross threshold is inappropriate as a blanket threshold within East Herts District, as this scale of development would represent a significant proportion of the overall retail projections in the authority area. Development smaller than 2,500 sq.m gross could have a significant adverse impact on the smaller town centres.

7.32 Accordingly, the following thresholds are recommended for all retail development outside the primary shopping area:

- 2,500 sq.m gross for Bishop’s Stortford;
- 1,000 sq.m gross for Hertford; and
- 500 sq.m gross elsewhere.

7.33 Higher thresholds are suggested for Bishop’s Stortford and Hertford as the main town centres in the District in terms of the amount of retail floorspace. For the other centres, proposals of 500 sq.m gross will be of greater significance and therefore should be subject to some form of impact assessment.

7.34 If considered appropriate, the Council could include these recommended thresholds within a retail policy at the next stages of the Local Plan review as locally set thresholds for requiring impact assessments for retail proposals outside of town centres and not in accordance with an up to date Local Plan, as set out in para. 26 of the NPPF.

7.35 The sequential approach indicates that existing centres are the preferred location for new retail, leisure and other uses typically found in town centres. Some forms of development (up to 500 sq.m gross) may be more appropriate in smaller centres and local parades, if there are localised areas of deficiency. The key issues are the nature and scale of retail development proposed and the catchment area the development seeks to serve.

7.36 In general, development within local centres and parades should primarily serve the community within which it is located, and a catchment area of not more than 800 metres ie. they should primarily serve walk-in catchment areas.

7.37 Based on the scale and role of centres within East Herts and the floorspace projections within this report, we believe the impact of smaller development proposals below the NPPF threshold could raise concerns.

Future Strategy Implementation and Monitoring

7.38 There are a number of broad areas of possible action the Council could pursue in order to maintain and enhance the role of shopping centres within the District, as follows:

- application of guidance within the NPPF, particularly relating to the sequential approach and impact tests in determining out-of-centre retail and other development proposals that generate significant numbers of trips;
- improving the range and choice of shops and services in all centres (where appropriate in terms of scale) by encouraging intensification, development and the re-occupation of vacant premises, and continuing to promote the centres;
- maintaining the generally high quality environment within each centre;
- bring forward development opportunities through the Local Plan process to improve the availability of modern premises suitable for new occupiers;
- pro-active approach to site assembly which may require the use of compulsory purchase powers.

7.39 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail development up to 2016, with longer term forecast up to 2021, 2026 and 2031. However, projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available. In particular, longer-term projections up to 2031 should be treated with caution.

7.40 Therefore, we would recommend that this retail study should be updated in 4-5 years time and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
- existing retail floorspace and average turnover to floorspace densities (floorspace surveys and turnover data from Management Horizons, Retail Rankings); and
- implemented development within and around the study area.

7.41 These key inputs into the retail capacity assessment can be amended to provide revised capacity projections. We do not envisage that the structure of the capacity assessment set out in this report will need to be amended.

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East Herts

Retail and Town Centres Study Update Appendices

East Herts Council

November 2013

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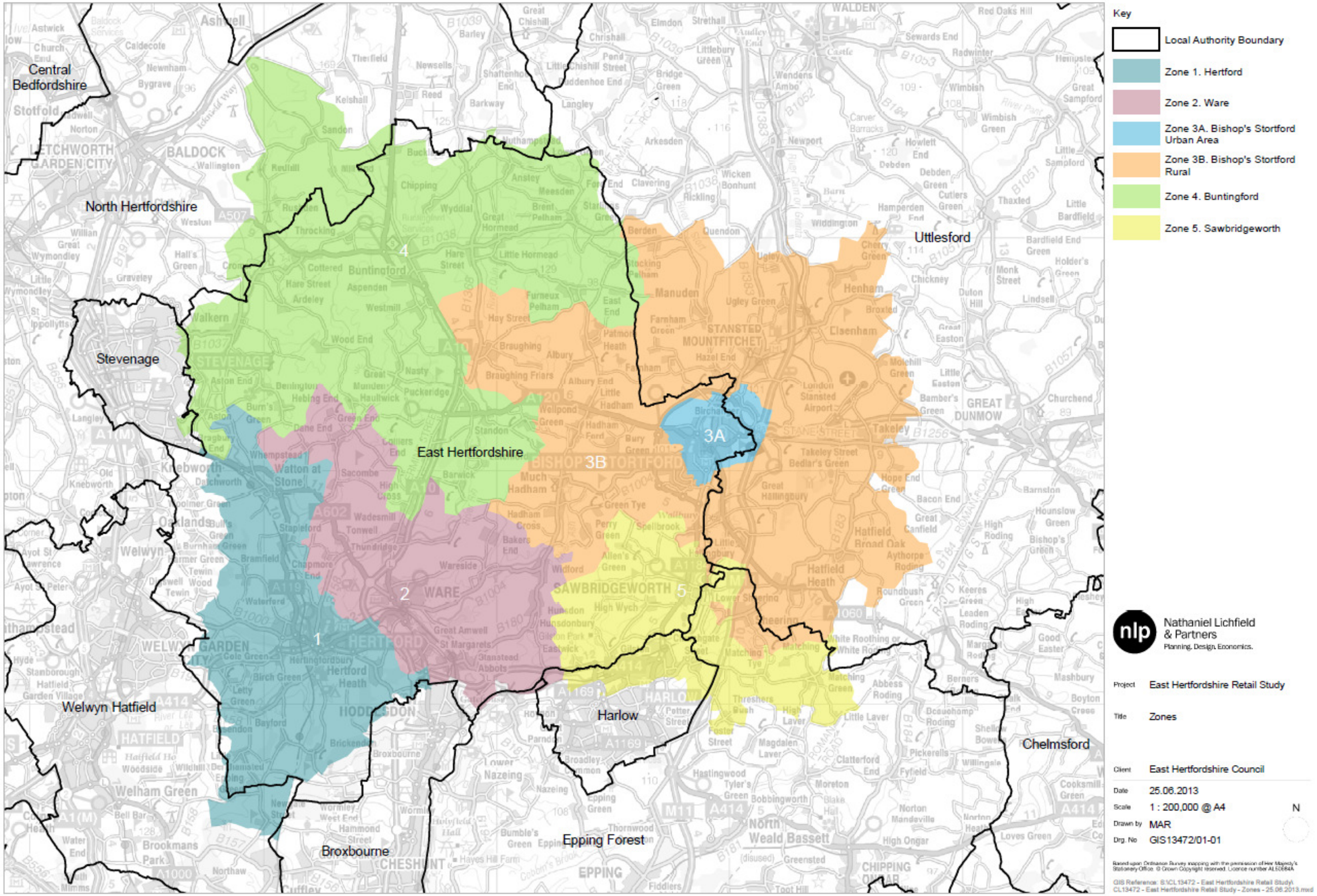
Appendices

Appendix 1 Study Area and Methodology

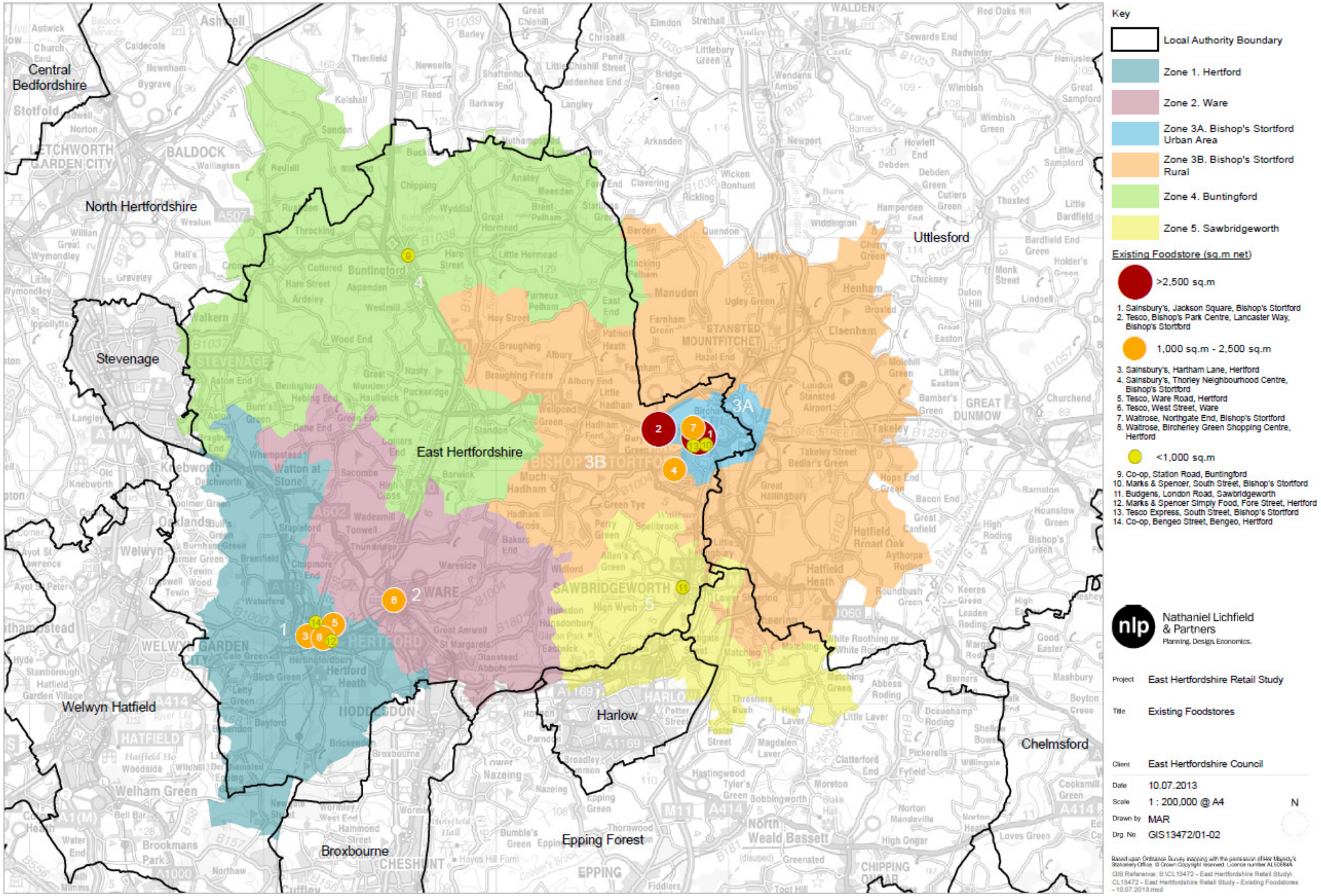
East Herts Study Area Zones

Zone	Area	Postcode Sectors
1	Hertford	SG13 7 SG13 8 SG14 1 SG14 2 SG14 3
2	Ware	SG12 0 SG12 7 SG12 8 SG12 9
3A	Bishop's Stortford Urban Area	CM23 2 CM23 3 CM23 5
3B	Bishop's Stortford Rural Area	CM22 6 CM22 7 CM23 1 CM23 4 CM24 1 CM24 8 SG11 2 SG10 6
4	Buntingford	SG11 1 SG2 7 SG9 0 SG9 9
5	Sawbridgeworth	CM17 0 CM20 2 CM21 0 CM21 9

Plan 1: East Herts Study Area



Plan 2: Existing Food Stores in East Herts



Retail Capacity Assessment – Methodology and Data

Price Base

1.1 All monetary values expressed in this study are at 2011 prices, consistent with Experian's base year expenditure figures for 2011 (Retail Planner Briefing Note 10) which is the most up to date information available.

Study Area

1.2 The quantitative analysis is based on a defined study area that covers the catchment areas of the main shopping destinations in East Herts. The study area is sub-divided into six zones based on postal sector boundaries as shown above. The survey zones take into consideration the extent of the catchment area of the main centres in East Herts.

Retail Expenditure

1.3 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2011 have been obtained.

1.4 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 10, September 2012) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

1.5 Experian's EBS growth forecast rates for 2011 to 2014 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: 0.1% for 2011-2012, -0.1% for 2012-2013 and 0% for 2013 to 2014; for comparison goods: 1.4% for 2011-2012, 1.8% for 2012-2013 and 2.4% for 2013-2014).

1.6 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth average forecasts have been adopted i.e. 0.6% per annum for convenience goods up to 2019 and 0.8% per annum after 2019, and 2.9% per annum growth for comparison goods. These growth rates are relatively cautious when compared with past growth rates, but in our view represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

1.7 Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store retail sales in 2011 is:

- 6.1% of convenience goods expenditure; and
- 11.9% of comparison goods expenditure.

1.8 Experian predicts that these figures will increase in the future, up to 20% by the end of the 2020s. However, Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2011 are:

- 1.8% of convenience goods expenditure; and
- 8.9% of comparison goods expenditure.

1.9 The projections provided by Experian suggest that these percentages could increase to 3.1% and 13.6% by 2017, and estimated at 4.5% and 16.0% by 2027. These figures have been adopted in this assessment.

1.10 Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the Internet. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

1.11 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector, but Experian's projections suggest this growth will level off by 2016/17.

1.12 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

Market Shares/Penetration Rates

1.13 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the 2013 household survey.

1.14 The total turnover of shops within the District is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Verdict (UK Food and Grocery Retailers 2012) and Mintel (Retail Rankings 2010) information, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Benchmark Turnover Levels

1.15 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

1.16 The estimated convenience goods sales areas have been derived from a combination of the Institute of Grocery Distribution (IGD), GOAD plans and NLP estimates based on site visits. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.

1.17 Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within the District and our experience of trading levels of small independent shops informed by household shopper surveys elsewhere, we have adopted an average sales density of £5,000 per sq.m net for convenience shops/stores in the study area. This is consistent with NLP's experience of retail studies across the South and East of England. The total benchmark turnover of identified convenience sales floorspace within East Herts is £233.19 million (Table 10, Appendix 2).

1.18 Mintel's Retail Rankings provides company average sales density information for a selection of national comparison retailers. This data suggests a notional average sales density for national high street comparison retailers of around £5,000 per sq.m.

Appendix 2 Convenience Assessment

Table 1: Population

Total Population	2011	2013	2016	2021	2026	2031
Zone 1 - Hertford	35,329	35,932	37,019	38,978	41,088	43,312
Zone 2 - Ware	29,744	30,238	31,141	32,780	34,548	36,411
Zone 3A - Bishop's Stortford Urban	25,687	26,125	26,920	28,356	29,902	31,533
Zone 3B - Bishop's Stortford Rural	40,034	40,921	42,415	45,014	47,764	50,684
Zone 4 - Buntingford	22,455	22,829	23,511	24,749	26,082	27,488
Zone 5 - Sawbridgeworth	21,875	22,260	22,914	24,051	25,250	26,510
Total	**175,124**	**178,306**	**183,921**	**193,927**	**204,634**	**215,938**

Sources:

Experian 2011

ONS Interim 2011-based Subnational Population Projections

Table 2: Convenience Goods Expenditure per person (£)

Convenience Goods Expenditure per person (£)	2011	2013	2016	2021	2026	2031
Zone 1 - Hertford	1,885	1,876	1,887	1,932	2,000	2,074
Zone 2 - Ware	1,981	1,971	1,982	2,029	2,101	2,179
Zone 3A - Bishop's Stortford Urban	1,914	1,904	1,915	1,961	2,030	2,106
Zone 3B - Bishop's Stortford Rural	1,939	1,930	1,941	1,987	2,057	2,134
Zone 4 - Buntingford	2,000	1,990	2,002	2,049	2,122	2,201
Zone 5 - Sawbridgeworth	1,967	1,957	1,968	2,015	2,086	2,164

Source:

Experian 2011

Notes:

Data in 2011 prices

Growth Rates:

0.1% 2011-2012, -0.1% 2012-2013, 0% 2013-2014, 0.6% p.a. 2014-2019, 0.8% p.a. from 2019

Excludes Special Forms of Trading

Table 3: Total Convenience Goods Expenditure (£m)

Total Convenience Goods Expenditure (£m)	2011	2013	2016	2021	2026	2031
Zone 1 - Hertford	66.60	67.41	69.85	75.31	82.18	89.83
Zone 2 - Ware	58.92	59.60	61.72	66.51	72.58	79.34
Zone 3A - Bishop's Stortford Urban	49.16	49.74	51.55	55.61	60.70	66.41
Zone 3B - Bishop's Stortford Rural	77.63	78.98	82.33	89.44	98.25	108.16
Zone 4 - Buntingford	44.91	45.43	47.07	50.71	55.35	60.50
Zone 5 - Sawbridgeworth	43.03	43.56	45.09	48.46	52.67	57.37
Total	**340.25**	**344.72**	**357.62**	**386.04**	**421.73**	**461.61**

Source: Tables 1 and 2

Table 4: 2013 Convenience Goods Market Shares (%)

Centre/Facility	Zone 1 Hertford	Zone 2 Ware	Zone 3A Bishop's Stortford Urban	Zone 3B Bishop's Stortford Rural	Zone 4 Buntingford	Zone 5 Sawbridgeworth	% Inflow
Sainsbury's, Hartham Lane, Hertford	16.0%	5.5%	0.0%	0.2%	1.9%	0.0%	10.0%
Tesco, Ware Road, Hertford	27.8%	8.6%	0.0%	0.0%	2.1%	0.4%	10.0%
Waitrose, Bircherley Green Shopping Centre, Hertford	15.7%	4.4%	0.0%	0.2%	0.4%	0.0%	10.0%
Marks & Spencer Simply Food, Fore Street, Hertford	2.6%	0.5%	0.0%	0.0%	0.0%	0.0%	10.0%
Co-op, Bengeo Street, Bengeo, Hertford	4.2%	0.4%	0.0%	0.0%	0.0%	0.0%	10.0%
Other Zone 1	7.6%	0.6%	0.0%	0.2%	0.0%	0.0%	5.0%
Tesco, West Street, Ware	0.8%	37.5%	0.0%	0.0%	3.6%	0.2%	10.0%
Other Zone 2	0.3%	7.1%	0.0%	0.4%	0.2%	0.0%	5.0%
Marks & Spencer, South Street, Bishop's Stortford	0.0%	0.0%	3.8%	2.4%	0.3%	0.5%	10.0%
Sainsbury's, Jackson Square, Bishop's Stortford	0.0%	0.3%	24.7%	12.7%	2.2%	2.9%	10.0%
Sainsbury's, Thorley Neighbourhood Centre, Bishop's Stortford	0.0%	0.5%	18.3%	17.8%	1.7%	6.2%	10.0%
Tesco Express, South Street, Bishop's Stortford	0.0%	0.0%	3.2%	3.7%	0.7%	0.7%	10.0%
Tesco, Bishop's Park Centre, Lancaster Way, Bishop's Stortford	0.6%	0.2%	20.9%	23.8%	5.2%	1.7%	10.0%
Waitrose, Northgate End, Bishop's Stortford	0.2%	0.2%	15.7%	11.6%	5.0%	3.6%	10.0%
Other Zone 3A/3B (in East Herts)	0.1%	1.9%	10.7%	11.5%	0.5%	1.2%	5.0%
Co-op, Station Road, Buntingford	0.0%	0.4%	0.0%	0.2%	18.1%	0.0%	10.0%
Other Zone 4 (in East Herts)	0.0%	0.2%	0.0%	0.1%	7.5%	0.0%	5.0%
Budgens, London Road, Sawbridgeworth	0.0%	0.0%	0.0%	0.0%	0.0%	16.6%	10.0%
Other Zone 5 (in East Herts)	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%	5.0%
East Herts Total	**75.9%**	**68.3%**	**97.3%**	**84.8%**	**49.4%**	**37.5%**	
Harlow	0.4%	8.7%	1.4%	5.4%	0.9%	61.1%	n/a
Stevenage	5.5%	2.7%	0.0%	0.4%	31.3%	0.0%	n/a
Hoddesdon	2.9%	8.5%	0.0%	0.2%	0.6%	0.3%	n/a
Welwyn Garden City	8.0%	4.0%	0.3%	0.0%	0.0%	0.0%	n/a
Brookfield Centre	2.7%	6.2%	0.5%	0.0%	0.6%	0.0%	n/a
Other Outside East Herts	4.6%	1.6%	0.5%	9.2%	17.2%	1.1%	n/a
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey, May 2013

Table 5: 2013 Convenience Goods Expenditure (£m)

Centre/Facility	Zone 1 Hertford	Zone 2 Ware	Zone 3A Bishop's Stortford Urban	Zone 3B Bishop's Stortford Rural	Zone 4 Buntingford	Zone 5 Sawbridgeworth	Inflow	Total
Expenditure 2013	**67.41**	**59.60**	**49.74**	**78.98**	**45.43**	**43.56**		**344.72**
Sainsbury's, Hartham Lane, Hertford	10.79	3.28	0.00	0.16	0.86	0.00	1.68	**16.76**
Tesco, Ware Road, Hertford	18.74	5.13	0.00	0.00	0.95	0.17	2.78	**27.77**
Waitrose, Bircherley Green Shopping Centre, Hertford	10.58	2.62	0.00	0.16	0.18	0.00	1.51	**15.05**
Marks & Spencer Simply Food, Fore Street, Hertford	1.75	0.30	0.00	0.00	0.00	0.00	0.23	**2.28**
Co-op, Bengeo Street, Bengeo, Hertford	2.83	0.24	0.00	0.00	0.00	0.00	0.34	**3.41**
Other Zone 1	5.12	0.36	0.00	0.16	0.00	0.00	0.30	**5.94**
Tesco, West Street, Ware	0.54	22.35	0.00	0.00	1.64	0.09	2.73	**27.35**
Other Zone 2	0.20	4.23	0.00	0.32	0.09	0.00	0.25	**5.10**
Marks & Spencer, South Street, Bishop's Stortford	0.00	0.00	1.89	1.90	0.14	0.22	0.46	**4.60**
Sainsbury's, Jackson Square, Bishop's Stortford	0.00	0.18	12.29	10.03	1.00	1.26	2.75	**27.51**
Sainsbury's, Thorley Neighbourhood Centre, Bishop's Stortford	0.00	0.30	9.10	14.06	0.77	2.70	2.99	**29.92**
Tesco Express, South Street, Bishop's Stortford	0.00	0.00	1.59	2.92	0.32	0.30	0.57	**5.71**
Tesco, Bishop's Park Centre, Lancaster Way, Bishop's Stortford	0.40	0.12	10.40	18.80	2.36	0.74	3.65	**36.47**
Waitrose, Northgate End, Bishop's Stortford	0.13	0.12	7.81	9.16	2.27	1.57	2.34	**23.41**
Other Zone 3A/3B (in East Herts)	0.07	1.13	5.32	9.08	0.23	0.52	0.86	**17.22**
Co-op, Station Road, Buntingford	0.00	0.24	0.00	0.16	8.22	0.00	0.96	**9.58**
Other Zone 4 (in East Herts)	0.00	0.12	0.00	0.08	3.41	0.00	0.19	**3.80**
Budgens, London Road, Sawbridgeworth	0.00	0.00	0.00	0.00	0.00	7.23	0.80	**8.04**
Other Zone 5 (in East Herts)	0.00	0.00	0.00	0.00	0.00	1.52	0.08	**1.60**
East Herts Total	**51.16**	**40.71**	**48.40**	**66.97**	**22.44**	**16.34**	**25.47**	**271.49**
Harlow	0.27	5.19	0.70	4.26	0.41	26.62	n/a	**37.44**
Stevenage	3.71	1.61	0.00	0.32	14.22	0.00	n/a	**19.85**
Hoddesdon	1.95	5.07	0.00	0.16	0.27	0.13	n/a	**7.58**
Welwyn Garden City	5.39	2.38	0.15	0.00	0.00	0.00	n/a	**7.93**
Brookfield Centre	1.82	3.70	0.25	0.00	0.27	0.00	n/a	**6.04**
Other Outside East Herts	3.10	0.95	0.25	7.27	7.81	0.48	n/a	**19.86**
Total	**67.41**	**59.60**	**49.74**	**78.98**	**45.43**	**43.56**		**370.19**

Source: Tables 3 and 4

Table 6: Future Convenience Goods Market Shares

Centre/Facility	Zone 1 Hertford	Zone 2 Ware	Zone 3A Bishop's Stortford Urban	Zone 3B Bishop's Stortford Rural	Zone 4 Buntingford	Zone 5 Sawbridgeworth	% Inflow
Hertford	66.1%	11.7%	0.0%	0.4%	4.3%	0.4%	10.0%
Ware	1.0%	60.0%	0.0%	0.0%	5.0%	0.3%	10.0%
Bishop's Stortford	0.8%	0.8%	86.6%	72.0%	14.9%	15.5%	10.0%
Buntingford	0.0%	0.3%	0.0%	0.2%	17.7%	0.0%	10.0%
Sawbridgeworth	0.0%	0.0%	0.0%	0.0%	0.0%	16.6%	10.0%
Other East Herts	8.0%	6.8%	10.7%	12.2%	8.1%	4.7%	5.0%
East Herts Total	**75.9%**	**79.6%**	**97.3%**	**84.8%**	**50.0%**	**37.5%**	
Harlow	0.4%	5.5%	1.4%	5.4%	0.9%	61.1%	n/a
Stevenage	5.5%	1.7%	0.0%	0.4%	30.9%	0.0%	n/a
Hoddesdon	2.9%	5.2%	0.0%	0.2%	0.6%	0.3%	n/a
Welwyn Garden City	8.0%	3.0%	0.3%	0.0%	0.0%	0.0%	n/a
Brookfield Centre	2.7%	4.0%	0.5%	0.0%	0.6%	0.0%	n/a
Other Outside East Herts	4.6%	1.0%	0.5%	9.2%	17.0%	1.1%	n/a
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey, May 2013 - NLP adjustments to reflect commitments

Table 7: 2016 Convenience Goods Expenditure (£m)

Centre/Facility	Zone 1 Hertford	Zone 2 Ware	Zone 3A Bishop's Stortford Urban	Zone 3B Bishop's Stortford Rural	Zone 4 Buntingford	Zone 5 Sawbridgeworth	Inflow	Total
Expenditure 2016	**69.85**	**61.72**	**51.55**	**82.33**	**47.07**	**45.09**		**357.62**
Hertford	46.17	7.22	0.00	0.33	2.02	0.18	6.21	**62.14**
Ware	0.70	37.03	0.00	0.00	2.35	0.14	4.47	**44.69**
Bishop's Stortford	0.56	0.49	44.64	59.28	7.01	6.99	13.22	**132.20**
Buntingford	0.00	0.19	0.00	0.16	8.33	0.00	0.96	**9.65**
Sawbridgeworth	0.00	0.00	0.00	0.00	0.00	7.49	0.83	**8.32**
Other East Herts	5.59	4.20	5.52	10.04	3.81	2.12	1.65	**32.92**
East Herts Total	**53.02**	**49.13**	**50.16**	**69.81**	**23.53**	**16.91**	**27.35**	**289.92**
Harlow	0.28	3.39	0.72	4.45	0.42	27.55	n/a	**36.82**
Stevenage	3.84	1.05	0.00	0.33	14.54	0.00	n/a	**19.77**
Hoddesdon	2.03	3.21	0.00	0.16	0.28	0.14	n/a	**5.82**
Welwyn Garden City	5.59	1.85	0.15	0.00	0.00	0.00	n/a	**7.59**
Brookfield Centre	1.89	2.47	0.26	0.00	0.28	0.00	n/a	**4.90**
Other Outside East Herts	3.21	0.62	0.26	7.57	8.00	0.50	n/a	**20.16**
Total	**69.85**	**61.72**	**51.55**	**82.33**	**47.07**	**45.09**		**384.97**

Source: Tables 3 and 6

Table 8: 2021 Convenience Goods Expenditure (£m)

Centre/Facility	Zone 1 Hertford	Zone 2 Ware	Zone 3A Bishop's Stortford Urban	Zone 3B Bishop's Stortford Rural	Zone 4 Buntingford	Zone 5 Sawbridgeworth	Inflow	Total
Expenditure 2021	**75.31**	**66.51**	**55.61**	**89.44**	**50.71**	**48.46**		**386.04**
Hertford	49.78	7.78	0.00	0.36	2.18	0.19	6.70	**66.99**
Ware	0.75	39.91	0.00	0.00	2.54	0.15	4.82	**48.16**
Bishop's Stortford	0.60	0.53	48.15	64.40	7.56	7.51	14.31	**143.06**
Buntingford	0.00	0.20	0.00	0.18	8.98	0.00	1.04	**10.39**
Sawbridgeworth	0.00	0.00	0.00	0.00	0.00	8.04	0.89	**8.94**
Other East Herts	6.02	4.52	5.95	10.91	4.11	2.28	1.78	**35.57**
East Herts Total	**57.16**	**52.94**	**54.10**	**75.85**	**25.35**	**18.17**	**29.53**	**313.11**
Harlow	0.30	3.66	0.78	4.83	0.46	29.61	n/a	**39.63**
Stevenage	4.14	1.13	0.00	0.36	15.67	0.00	n/a	**21.30**
Hoddesdon	2.18	3.46	0.00	0.18	0.30	0.15	n/a	**6.27**
Welwyn Garden City	6.02	2.00	0.17	0.00	0.00	0.00	n/a	**8.19**
Brookfield Centre	2.03	2.66	0.28	0.00	0.30	0.00	n/a	**5.28**
Other Outside East Herts	3.46	0.67	0.28	8.23	8.62	0.53	n/a	**21.79**
Total	**75.31**	**66.51**	**55.61**	**89.44**	**50.71**	**48.46**		**415.57**

Source: Tables 3 and 6

Table 9: 2026 Convenience Goods Expenditure (£m)

Centre/Facility	Zone 1 Hertford	Zone 2 Ware	Zone 3A Bishop's Stortford Urban	Zone 3B Bishop's Stortford Rural	Zone 4 Buntingford	Zone 5 Sawbridgeworth	Inflow	Total
Expenditure 2026	**82.18**	**72.58**	**60.70**	**98.25**	**55.35**	**52.67**		**421.73**
Hertford	54.32	8.49	0.00	0.39	2.38	0.21	7.31	**73.10**
Ware	0.82	43.55	0.00	0.00	2.77	0.16	5.26	**52.55**
Bishop's Stortford	0.66	0.58	52.57	70.74	8.25	8.16	15.66	**156.62**
Buntingford	0.00	0.22	0.00	0.20	9.80	0.00	1.13	**11.35**
Sawbridgeworth	0.00	0.00	0.00	0.00	0.00	8.74	0.97	**9.71**
Other East Herts	6.57	4.94	6.50	11.99	4.48	2.48	1.94	**38.89**
East Herts Total	**62.37**	**57.78**	**59.06**	**83.32**	**27.67**	**19.75**	**32.28**	**342.23**
Harlow	0.33	3.99	0.85	5.31	0.50	32.18	n/a	**43.16**
Stevenage	4.52	1.23	0.00	0.39	17.10	0.00	n/a	**23.25**
Hoddesdon	2.38	3.77	0.00	0.20	0.33	0.16	n/a	**6.84**
Welwyn Garden City	6.57	2.18	0.18	0.00	0.00	0.00	n/a	**8.93**
Brookfield Centre	2.22	2.90	0.30	0.00	0.33	0.00	n/a	**5.76**
Other Outside East Herts	3.78	0.73	0.30	9.04	9.41	0.58	n/a	**23.84**
Total	**82.18**	**72.58**	**60.70**	**98.25**	**55.35**	**52.67**		**454.01**

Source: Tables 3 and 6

Table 10: 2031 Convenience Goods Expenditure (£m)

Centre/Facility	Zone 1 Hertford	Zone 2 Ware	Zone 3A Bishop's Stortford Urban	Zone 3B Bishop's Stortford Rural	Zone 4 Buntingford	Zone 5 Sawbridgeworth	Inflow	Total
Expenditure 2031	**89.83**	**79.34**	**66.41**	**108.16**	**60.50**	**57.37**		**461.61**
Hertford	59.38	9.28	0.00	0.43	2.60	0.23	7.99	**79.91**
Ware	0.90	47.60	0.00	0.00	3.03	0.17	5.74	**57.44**
Bishop's Stortford	0.72	0.63	57.51	77.88	9.01	8.89	17.18	**171.83**
Buntingford	0.00	0.24	0.00	0.22	10.71	0.00	1.24	**12.40**
Sawbridgeworth	0.00	0.00	0.00	0.00	0.00	9.52	1.06	**10.58**
Other East Herts	7.19	5.40	7.11	13.20	4.90	2.70	2.13	**42.61**
East Herts Total	**68.18**	**63.15**	**64.62**	**91.72**	**30.25**	**21.51**	**35.35**	**374.78**
Harlow	0.36	4.36	0.93	5.84	0.54	35.05	n/a	**47.09**
Stevenage	4.94	1.35	0.00	0.43	18.69	0.00	n/a	**25.42**
Hoddesdon	2.61	4.13	0.00	0.22	0.36	0.17	n/a	**7.48**
Welwyn Garden City	7.19	2.38	0.20	0.00	0.00	0.00	n/a	**9.77**
Brookfield Centre	2.43	3.17	0.33	0.00	0.36	0.00	n/a	**6.29**
Other Outside East Herts	4.13	0.79	0.33	9.95	10.29	0.63	n/a	**26.12**
Total	**89.83**	**79.34**	**66.41**	**108.16**	**60.50**	**57.37**		**496.95**

Source: Tables 3 and 6

Table 11: Convenience Goods Floorspace and Benchmark Turnover, 2013

Town/Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Hertford					
Sainsbury's, Hartham Lane, Hertford	2,328	85%	1,979	£12,537	£24.81
Tesco, Ware Road, Hertford	2,224	85%	1,890	£11,126	£21.03
Waitrose, Bircherley Green Shopping Centre, Hertford	1,170	90%	1,053	£11,818	£12.44
Marks & Spencer Simply Food, Fore Street, Hertford	455	100%	455	£10,932	£4.97
Co-op, Bengeo Street, Bengeo, Hertford	202	95%	192	£7,496	£1.44
Other Hertford Town Centre Shops	890	100%	890	£5,000	£4.45
Hertford Total	**7,269**		**6,459**		**£69.15**
Ware					
Tesco, West Street, Ware	2,211	85%	1,879	£11,126	£20.91
Other Ware Town Centre Shops	900	100%	900	£5,000	£4.50
Ware Total	**3,111**		**2,779**		**£25.41**
Bishop's Stortford					
Marks & Spencer, South Street, Bishop's Stortford	548	100%	548	£10,932	£5.99
Sainsbury's, Jackson Square, Bishop's Stortford	3,813	80%	3,050	£12,537	£38.24
Sainsbury's, Thorley Neighbourhood Centre, Bishop's Stortford	2,315	85%	1,968	£12,537	£24.67
Tesco Express, South Street, Bishop's Stortford	378	95%	359	£11,126	£4.00
Tesco, Bishop's Park Centre, Lancaster Way, Bishop's Stortford	3,311	80%	2,649	£11,126	£29.47
Waitrose, Northgate End, Bishop's Stortford	1,672	90%	1,505	£11,818	£17.78
Other Bishop's Stortford Town Centre Shops	777	100%	777	£5,000	£3.89
Bishop's Stortford Total	**12,814**		**10,856**		**£124.04**
Buntingford					
Co-op, Station Road, Buntingford	723	95%	687	£7,496	£5.15
Other Buntingford Town Centre Shops	1,029	100%	1,029	£5,000	£5.15
Buntingford Total	**1,752**		**1,716**		**£10.29**
Sawbridgeworth					
Budgens, London Road, Sawbridgeworth	504	100%	504	£5,000	£2.52
Other Sawbridgeworth Town Centre Shops	357	100%	357	£5,000	£1.79
Sawbridgeworth Total	**861**		**861**		**£4.31**
Total	**25,807**		**22,671**		**£233.19**
Commitments					
Asda, Ware	2,601	70%	1,821	£13,632	£24.82
Tesco, Hertford	588	100%	588	£11,126	£6.54
Waitrose, Bishop's Stortford	525	85%	446	£11,818	£5.27
Aldi, Bishop's Stortford	990	85%	842	£7,731	£6.51
Total	**4,704**		**3,696**		**£43.14**

Source: IGD, Goad and East Herts Council

Table 12: Summary of Convenience Goods Floorspace Capacity 2013 to 2031

Centre	2013	2016	2021	2026	2031
Available Expenditure in District (£m)					
Hertford	65.27	62.14	66.99	73.10	79.91
Ware	27.35	44.69	48.16	52.55	57.44
Bishop's Stortford	127.61	132.20	143.06	156.62	171.83
Buntingford	9.58	9.65	10.39	11.35	12.40
Sawbridgeworth	8.04	8.32	8.94	9.71	10.58
Other East Herts	33.65	32.92	35.57	38.89	42.61
Total	**271.49**	**289.92**	**313.11**	**342.23**	**374.78**
Benchmark Turnover of Existing Facilities (£m)					
Hertford	69.15	75.69	75.69	75.69	75.69
Ware	25.41	50.23	50.23	50.23	50.23
Bishop's Stortford	124.04	135.82	135.82	135.82	135.82
Buntingford	10.29	10.29	10.29	10.29	10.29
Sawbridgeworth	4.31	4.31	4.31	4.31	4.31
Other East Herts	33.65	33.65	33.65	33.65	33.65
Total	**266.84**	**309.98**	**309.98**	**309.98**	**309.98**
Surplus/Deficit Expenditure (£m)					
Hertford*	-3.88	-13.55	-8.70	-2.59	4.22
Ware*	1.94	-5.54	-2.07	2.32	7.21
Bishop's Stortford*	3.58	-3.62	7.24	20.80	36.01
Buntingford	-0.72	-0.65	0.10	1.05	2.11
Sawbridgeworth	3.73	4.01	4.63	5.41	6.28
Other East Herts	0.00	-0.72	1.93	5.25	8.96
Total	**4.65**	**-20.07**	**3.13**	**32.25**	**64.80**
Turnover Density New Floorspace (£ per sq.m)					
Large food stores	£13,000	£13,000	£13,000	£13,000	£13,000
Local shops	£5,000	£5,000	£5,000	£5,000	£5,000
Floorspace Requirement (sq.m net)					
Hertford	-298	-1,042	-669	-199	325
Ware	149	-426	-160	179	555
Bishop's Stortford	275	-279	557	1,600	2,770
Buntingford	-143	-130	20	210	422
Sawbridgeworth	746	802	927	1,082	1,255
Other East Herts	0	-144	385	1,050	1,793
Total	**728**	**-1,218**	**1,060**	**3,922**	**7,120**
Floorspace Requirement (sq.m gross)					
Hertford	-426	-1,489	-956	-284	464
Ware	213	-609	-228	255	793
Bishop's Stortford	393	-398	796	2,286	3,957
Buntingford	-205	-185	29	300	603
Sawbridgeworth	1,066	1,146	1,324	1,546	1,793
Other East Herts	0	-206	550	1,500	2,561
Total	**1,040**	**-1,741**	**1,515**	**5,603**	**10,171**

** food store commitments added at 2016*

Source: Tables 5 to 11

Appendix 3 Comparison Assessment

Table 1: Population

Total Population	2011	2013	2016	2021	2026	2031
Zone 1 - Hertford	35,329	35,932	37,019	38,978	41,088	43,312
Zone 2 - Ware	29,744	30,238	31,141	32,780	34,548	36,411
Zone 3A - Bishop's Stortford Urban	25,687	26,125	26,920	28,356	29,902	31,533
Zone 3B - Bishop's Stortford Rural	40,034	40,921	42,415	45,014	47,764	50,684
Zone 4 - Buntingford	22,455	22,829	23,511	24,749	26,082	27,488
Zone 5 - Sawbridgeworth	21,875	22,260	22,914	24,051	25,250	26,510
Total	**175,124**	**178,306**	**183,921**	**193,927**	**204,634**	**215,938**

Sources:

Experian 2011

ONS Interim 2011-based Subnational Population Projections

Table 2: Comparison Goods Expenditure per person (£)

Comparison Goods Expenditure per person (£)	2011	2013	2016	2021	2026	2031
Zone 1 - Hertford	3,011	3,047	3,222	3,593	4,135	4,765
Zone 2 - Ware	3,121	3,158	3,340	3,725	4,287	4,940
Zone 3A - Bishop's Stortford Urban	3,003	3,038	3,213	3,583	4,124	4,752
Zone 3B - Bishop's Stortford Rural	3,238	3,276	3,465	3,864	4,447	5,124
Zone 4 - Buntingford	3,291	3,330	3,522	3,928	4,521	5,209
Zone 5 - Sawbridgeworth	3,005	3,041	3,216	3,587	4,128	4,757

Source:

Experian 2011

Notes:

Data in 2011 prices

Growth Rates:

Growth Rates: 1.4% 2011-2012, 1.8% 2012-2013, 2.4% 2013-2014, 2.9% p.a. from 2014

Excludes Special Forms of Trading

Table 3: Total Comparison Goods Expenditure (£m)

Total Comparison Goods Expenditure (£m)	2011	2013	2016	2021	2026	2031
Zone 1 - Hertford	106.38	109.48	119.27	140.05	169.90	206.38
Zone 2 - Ware	92.83	95.49	104.01	122.10	148.11	179.87
Zone 3A - Bishop's Stortford Urban	77.14	79.37	86.49	101.60	123.32	149.85
Zone 3B - Bishop's Stortford Rural	129.63	134.06	146.97	173.93	212.41	259.71
Zone 4 - Buntingford	73.90	76.02	82.81	97.21	117.92	143.18
Zone 5 - Sawbridgeworth	65.73	67.69	73.69	86.27	104.23	126.11
Total	**545.61**	**562.12**	**613.25**	**721.17**	**875.88**	**1,065.09**

Source: Tables 1 and 2

Table 4: 2013 Comparison Goods Market Shares (%)

Centre/Facility	Zone 1 Hertford	Zone 2 Ware	Zone 3A Bishop's Stortford Urban	Zone 3B Bishop's Stortford Rural	Zone 4 Buntingford	Zone 5 Sawbridgeworth	% Inflow
Hertford	22.8%	9.4%	0.0%	0.3%	1.8%	0.0%	10.0%
Madford Retail Park, Ware Road, Hertford	1.9%	1.2%	0.0%	0.1%	0.1%	0.0%	10.0%
Ware	1.0%	11.5%	0.1%	0.6%	1.2%	0.5%	10.0%
Bishop's Stortford	0.1%	1.5%	50.4%	43.1%	8.9%	16.5%	10.0%
Buntingford	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	10.0%
Sawbridgeworth	0.0%	0.0%	0.0%	0.2%	0.2%	3.3%	10.0%
Stanstead Abbotts	0.0%	0.1%	0.1%	0.2%	0.0%	0.0%	5.0%
Stansted Mountfitchet	0.0%	0.0%	0.2%	0.9%	0.1%	0.2%	5.0%
Other East Herts	0.1%	0.2%	0.2%	0.3%	0.4%	0.1%	5.0%
East Herts Total	**25.9%**	**23.9%**	**51.0%**	**45.7%**	**16.8%**	**20.6%**	
Harlow (incl. Retail Parks)	8.4%	31.7%	20.7%	27.0%	5.2%	52.9%	n/a
Stevenage (incl. Retail Parks)	16.4%	9.4%	0.4%	0.7%	36.1%	0.0%	n/a
Hoddesdon	1.4%	2.4%	0.0%	0.1%	0.0%	0.0%	n/a
Welwyn Garden City	22.7%	12.3%	1.4%	2.4%	9.8%	3.5%	n/a
Brookfield Centre	5.5%	8.8%	0.9%	1.3%	3.5%	2.8%	n/a
Other Outside East Herts	19.7%	11.5%	25.6%	22.8%	28.6%	20.2%	n/a
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey, May 2013

Table 5: 2013 Comparison Goods Expenditure (£m)

Centre/Facility	Zone 1 Hertford	Zone 2 Ware	Zone 3A Bishop's Stortford Urban	Zone 3B Bishop's Stortford Rural	Zone 4 Buntingford	Zone 5 Sawbridgeworth	Inflow	Total
Expenditure 2013	**109.48**	**95.49**	**79.37**	**134.06**	**76.02**	**67.69**		**562.12**
Hertford	24.96	8.98	0.00	0.40	1.37	0.00	3.97	**39.68**
Madford Retail Park, Ware Road, Hertford	2.08	1.15	0.00	0.13	0.08	0.00	0.38	**3.82**
Ware	1.09	10.98	0.08	0.80	0.91	0.34	1.58	**15.79**
Bishop's Stortford	0.11	1.43	40.00	57.78	6.77	11.17	13.03	**130.29**
Buntingford	0.00	0.00	0.00	0.00	3.12	0.00	0.35	**3.46**
Sawbridgeworth	0.00	0.00	0.00	0.27	0.15	2.23	0.29	**2.95**
Stanstead Abbotts	0.00	0.10	0.08	0.27	0.00	0.00	0.02	**0.47**
Stansted Mountfitchet	0.00	0.00	0.16	1.21	0.08	0.14	0.08	**1.66**
Other East Herts	0.11	0.19	0.16	0.40	0.30	0.07	0.06	**1.30**
East Herts Total	**28.36**	**22.82**	**40.48**	**61.26**	**12.77**	**13.94**	**19.77**	**199.41**
Harlow (incl. Retail Parks)	9.20	30.27	16.43	36.20	3.95	35.81	n/a	**131.86**
Stevenage (incl. Retail Parks)	17.96	8.98	0.32	0.94	27.44	0.00	n/a	**55.63**
Hoddesdon	1.53	2.29	0.00	0.13	0.00	0.00	n/a	**3.96**
Welwyn Garden City	24.85	11.75	1.11	3.22	7.45	2.37	n/a	**50.75**
Brookfield Centre	6.02	8.40	0.71	1.74	2.66	1.90	n/a	**21.44**
Other Outside East Herts	21.57	10.98	20.32	30.57	21.74	13.67	n/a	**118.85**
Total	**109.48**	**95.49**	**79.37**	**134.06**	**76.02**	**67.69**		**581.89**

Source: Tables 3 and 4

Table 6: Future Comparison Goods Market Shares

Centre/Facility	Zone 1 Hertford	Zone 2 Ware	Zone 3A Bishop's Stortford Urban	Zone 3B Bishop's Stortford Rural	Zone 4 Buntingford	Zone 5 Sawbridgeworth	% Inflow
Hertford	22.6%	8.9%	0.0%	0.3%	1.6%	0.0%	10.0%
Madford Retail Park, Ware Road, Hertford	1.9%	1.2%	0.0%	0.1%	0.1%	0.0%	10.0%
Ware	1.2%	13.5%	0.1%	0.7%	1.4%	0.6%	10.0%
Bishop's Stortford	0.1%	1.6%	60.0%	47.0%	10.0%	18.4%	10.0%
Buntingford	0.0%	0.0%	0.0%	0.0%	4.0%	0.0%	10.0%
Sawbridgeworth	0.0%	0.0%	0.0%	0.2%	0.2%	3.2%	10.0%
Stanstead Abbotts	0.0%	0.1%	0.1%	0.2%	0.0%	0.0%	5.0%
Stansted Mountfitchet	0.0%	0.0%	0.2%	0.9%	0.1%	0.2%	5.0%
Other East Herts	0.1%	0.2%	0.2%	0.3%	0.4%	0.1%	5.0%
East Herts Total	**25.9%**	**25.5%**	**60.6%**	**49.7%**	**17.8%**	**22.5%**	
Harlow (incl. Retail Parks)	8.4%	30.5%	16.8%	24.9%	5.2%	51.2%	n/a
Stevenage (incl. Retail Parks)	16.4%	9.4%	0.4%	0.7%	35.8%	0.0%	n/a
Hoddesdon	1.4%	2.4%	0.0%	0.1%	0.0%	0.0%	n/a
Welwyn Garden City	22.7%	12.0%	1.4%	2.4%	9.7%	3.5%	n/a
Brookfield Centre	5.5%	8.8%	0.8%	1.3%	3.5%	2.8%	n/a
Other Outside East Herts	19.7%	11.4%	20.0%	20.9%	28.0%	20.0%	n/a
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey, May 2013 - NLP adjustments to reflect commitments

Table 7: 2016 Comparison Goods Expenditure (£m)

Centre/Facility	Zone 1 Hertford	Zone 2 Ware	Zone 3A Bishop's Stortford Urban	Zone 3B Bishop's Stortford Rural	Zone 4 Buntingford	Zone 5 Sawbridgeworth	Inflow	Total
Expenditure 2016	**119.27**	**104.01**	**86.49**	**146.97**	**82.81**	**73.69**		**613.25**
Hertford	26.96	9.26	0.00	0.44	1.32	0.00	4.22	**42.20**
Madford Retail Park, Ware Road, Hertford	2.27	1.25	0.00	0.15	0.08	0.00	0.42	**4.16**
Ware	1.43	14.04	0.09	1.03	1.16	0.44	2.02	**20.21**
Bishop's Stortford	0.12	1.66	51.90	69.08	8.28	13.56	16.07	**160.66**
Buntingford	0.00	0.00	0.00	0.00	3.31	0.00	0.37	**3.68**
Sawbridgeworth	0.00	0.00	0.00	0.29	0.17	2.36	0.31	**3.13**
Stanstead Abbotts	0.00	0.10	0.09	0.29	0.00	0.00	0.03	**0.51**
Stansted Mountfitchet	0.00	0.00	0.17	1.32	0.08	0.15	0.09	**1.82**
Other East Herts	0.12	0.21	0.17	0.44	0.33	0.07	0.07	**1.42**
East Herts Total	**30.89**	**26.52**	**52.42**	**73.04**	**14.74**	**16.58**	**23.59**	**237.79**
Harlow (incl. Retail Parks)	10.02	31.72	14.53	36.60	4.31	37.73	n/a	**134.90**
Stevenage (incl. Retail Parks)	19.56	9.78	0.35	1.03	29.65	0.00	n/a	**60.36**
Hoddesdon	1.67	2.50	0.00	0.15	0.00	0.00	n/a	**4.31**
Welwyn Garden City	27.08	12.48	1.21	3.53	8.03	2.58	n/a	**54.91**
Brookfield Centre	6.56	9.15	0.69	1.91	2.90	2.06	n/a	**23.28**
Other Outside East Herts	23.50	11.86	17.30	30.72	23.19	14.74	n/a	**121.29**
Total	**119.27**	**104.01**	**86.49**	**146.97**	**82.81**	**73.69**		**636.84**

Source: Tables 3 and 6

Table 8: 2021 Comparison Goods Expenditure (£m)

Centre/Facility	Zone 1 Hertford	Zone 2 Ware	Zone 3A Bishop's Stortford Urban	Zone 3B Bishop's Stortford Rural	Zone 4 Buntingford	Zone 5 Sawbridgeworth	Inflow	Total
Expenditure 2021	**140.05**	**122.10**	**101.60**	**173.93**	**97.21**	**86.27**		**721.17**
Hertford	31.65	10.87	0.00	0.52	1.56	0.00	4.96	**49.55**
Madford Retail Park, Ware Road, Hertford	2.66	1.47	0.00	0.17	0.10	0.00	0.49	**4.89**
Ware	1.68	16.48	0.10	1.22	1.36	0.52	2.37	**23.74**
Bishop's Stortford	0.14	1.95	60.96	81.75	9.72	15.87	18.93	**189.33**
Buntingford	0.00	0.00	0.00	0.00	3.89	0.00	0.43	**4.32**
Sawbridgeworth	0.00	0.00	0.00	0.35	0.19	2.76	0.37	**3.67**
Stanstead Abbotts	0.00	0.12	0.10	0.35	0.00	0.00	0.03	**0.60**
Stansted Mountfitchet	0.00	0.00	0.20	1.57	0.10	0.17	0.11	**2.15**
Other East Herts	0.14	0.24	0.20	0.52	0.39	0.09	0.08	**1.67**
East Herts Total	**36.27**	**31.14**	**61.57**	**86.44**	**17.30**	**19.41**	**27.77**	**279.91**
Harlow (incl. Retail Parks)	11.76	37.24	17.07	43.31	5.06	44.17	n/a	**158.61**
Stevenage (incl. Retail Parks)	22.97	11.48	0.41	1.22	34.80	0.00	n/a	**70.87**
Hoddesdon	1.96	2.93	0.00	0.17	0.00	0.00	n/a	**5.07**
Welwyn Garden City	31.79	14.65	1.42	4.17	9.43	3.02	n/a	**64.49**
Brookfield Centre	7.70	10.75	0.81	2.26	3.40	2.42	n/a	**27.34**
Other Outside East Herts	27.59	13.92	20.32	36.35	27.22	17.25	n/a	**142.65**
Total	**140.05**	**122.10**	**101.60**	**173.93**	**97.21**	**86.27**		**748.94**

Source: Tables 3 and 6

Table 9: 2026 Comparison Goods Expenditure (£m)

Centre/Facility	Zone 1 Hertford	Zone 2 Ware	Zone 3A Bishop's Stortford Urban	Zone 3B Bishop's Stortford Rural	Zone 4 Buntingford	Zone 5 Sawbridgeworth	Inflow	Total
Expenditure 2026	**169.90**	**148.11**	**123.32**	**212.41**	**117.92**	**104.23**		**875.88**
Hertford	38.40	13.18	0.00	0.64	1.89	0.00	6.01	**60.11**
Madford Retail Park, Ware Road, Hertford	3.23	1.78	0.00	0.21	0.12	0.00	0.59	**5.93**
Ware	2.04	19.99	0.12	1.49	1.65	0.63	2.88	**28.80**
Bishop's Stortford	0.17	2.37	73.99	99.83	11.79	19.18	23.04	**230.37**
Buntingford	0.00	0.00	0.00	0.00	4.72	0.00	0.52	**5.24**
Sawbridgeworth	0.00	0.00	0.00	0.42	0.24	3.34	0.44	**4.44**
Stanstead Abbotts	0.00	0.15	0.12	0.42	0.00	0.00	0.04	**0.73**
Stansted Mountfitchet	0.00	0.00	0.25	1.91	0.12	0.21	0.13	**2.62**
Other East Herts	0.17	0.30	0.25	0.64	0.47	0.10	0.10	**2.03**
East Herts Total	**44.00**	**37.77**	**74.73**	**105.57**	**20.99**	**23.45**	**33.76**	**340.27**
Harlow (incl. Retail Parks)	14.27	45.17	20.72	52.89	6.13	53.37	n/a	**192.55**
Stevenage (incl. Retail Parks)	27.86	13.92	0.49	1.49	42.21	0.00	n/a	**85.98**
Hoddesdon	2.38	3.55	0.00	0.21	0.00	0.00	n/a	**6.15**
Welwyn Garden City	38.57	17.77	1.73	5.10	11.44	3.65	n/a	**78.25**
Brookfield Centre	9.34	13.03	0.99	2.76	4.13	2.92	n/a	**33.17**
Other Outside East Herts	33.47	16.88	24.66	44.39	33.02	20.85	n/a	**173.27**
Total	**169.90**	**148.11**	**123.32**	**212.41**	**117.92**	**104.23**		**909.63**

Source: Tables 3 and 6

Table 10: 2031 Comparison Goods Expenditure (£m)

Centre/Facility	Zone 1 Hertford	Zone 2 Ware	Zone 3A Bishop's Stortford Urban	Zone 3B Bishop's Stortford Rural	Zone 4 Buntingford	Zone 5 Sawbridgeworth	Inflow	Total
Expenditure 2031	**206.38**	**179.87**	**149.85**	**259.71**	**143.18**	**126.11**		**1,065.09**
Hertford	46.64	16.01	0.00	0.78	2.29	0.00	7.30	**73.02**
Madford Retail Park, Ware Road, Hertford	3.92	2.16	0.00	0.26	0.14	0.00	0.72	**7.20**
Ware	2.48	24.28	0.15	1.82	2.00	0.76	3.50	**34.99**
Bishop's Stortford	0.21	2.88	89.91	122.06	14.32	23.20	28.06	**280.64**
Buntingford	0.00	0.00	0.00	0.00	5.73	0.00	0.64	**6.36**
Sawbridgeworth	0.00	0.00	0.00	0.52	0.29	4.04	0.54	**5.38**
Stanstead Abbotts	0.00	0.18	0.15	0.52	0.00	0.00	0.04	**0.89**
Stansted Mountfitchet	0.00	0.00	0.30	2.34	0.14	0.25	0.16	**3.19**
Other East Herts	0.21	0.36	0.30	0.78	0.57	0.13	0.12	**2.47**
East Herts Total	**53.45**	**45.87**	**90.81**	**129.07**	**25.49**	**28.37**	**41.09**	**414.15**
Harlow (incl. Retail Parks)	17.34	54.86	25.17	64.67	7.45	64.57	n/a	**234.05**
Stevenage (incl. Retail Parks)	33.85	16.91	0.60	1.82	51.26	0.00	n/a	**104.43**
Hoddesdon	2.89	4.32	0.00	0.26	0.00	0.00	n/a	**7.47**
Welwyn Garden City	46.85	21.58	2.10	6.23	13.89	4.41	n/a	**95.07**
Brookfield Centre	11.35	15.83	1.20	3.38	5.01	3.53	n/a	**40.30**
Other Outside East Herts	40.66	20.51	29.97	54.28	40.09	25.22	n/a	**210.72**
Total	**206.38**	**179.87**	**149.85**	**259.71**	**143.18**	**126.11**		**1,106.18**

Source: Tables 3 and 6

Table 11: Comparison Goods Floorspace, 2013

Town/Store	Comparison Goods Floorspace (sq.m gross)	Comparison Goods Floorspace (sq.m net)
Hertford		
Hertford Town Centre comparison shops	11,630	8,723
Comparison floorspace in food stores	n/a	810
Wickes, Madford Retail Park, Hertford	3,755	2,816
Matalan, Madford Retail Park, Hertford	2,846	2,135
Hertford Total	**18,231**	**14,483**
Ware		
Ware Town Centre comparison shops	5,890	4,418
Comparison floorspace in food stores	n/a	332
Ware Total	**5,890**	**4,750**
Bishop's Stortford		
Bishop's Stortford Town Centre comparison shops	24,820	18,067
Comparison floorspace in food stores	n/a	1,958
Bishop's Stortford Total	**24,820**	**20,025**
Buntingford		
Buntingford Town Centre comparison shops	1,630	1,223
Comparison floorspace in food stores	n/a	36
Buntingford Total	**1,630**	**1,259**
Sawbridgeworth		
Sawbridgeworth Town Centre comparison shops	1,300	975
Sawbridgeworth Total	**1,300**	**975**
Total		**41,491**
Commitments		
Old River Lane, Bishop's Stortford	16,000	12,800
Waitrose, Bishop's Stortford	n/a	79
Asda, Ware	n/a	780
Aldi, Bishop's Stortford	n/a	148
Total	**16,000**	**13,807**

Source: IGD, Goad and East Herts Council

Table 12: Summary of Comparison Goods Floorspace Capacity 2013 to 2031

Centre	2013	2016	2021	2026	2031
Available Expenditure in District (£m)					
Hertford	43.49	46.36	54.44	66.04	80.23
Ware	15.79	20.21	23.74	28.80	34.99
Bishop's Stortford	130.29	160.66	189.33	230.37	280.64
Buntingford	3.46	3.68	4.32	5.24	6.36
Sawbridgeworth	2.95	3.13	3.67	4.44	5.38
Other East Herts	3.42	3.74	4.42	5.38	6.55
Total	**199.41**	**237.79**	**279.91**	**340.27**	**414.15**
Benchmark Turnover of Existing Facilities (£m)					
Hertford	43.49	45.89	50.17	54.85	59.96
Ware	15.79	23.39	25.57	27.96	30.56
Bishop's Stortford	130.29	206.74	226.03	247.11	270.17
Buntingford	3.46	3.65	3.99	4.37	4.77
Sawbridgeworth	2.95	3.11	3.40	3.72	4.07
Other East Herts	3.42	3.61	3.95	4.32	4.72
Total	**199.41**	**286.39**	**313.11**	**342.32**	**374.26**
Surplus/Defecit Expenditure (£m)					
Hertford	n/a	0.47	4.27	11.19	20.26
Ware	n/a	-3.18	-1.83	0.84	4.42
Bishop's Stortford	n/a	-46.08	-36.70	-16.75	10.47
Buntingford	n/a	0.03	0.33	0.87	1.59
Sawbridgeworth	n/a	0.02	0.27	0.72	1.31
Other East Herts	n/a	0.13	0.47	1.06	1.83
Total	**n/a**	**-48.60**	**-33.20**	**-2.06**	**39.89**
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,275	£5,767	£6,305	£6,893
Floorspace Requirement (sq.m net)					
Hertford	n/a	90	740	1,775	2,939
Ware	n/a	-602	-318	134	642
Bishop's Stortford	n/a	-8,735	-6,363	-2,656	1,519
Buntingford	n/a	5	57	139	231
Sawbridgeworth	n/a	4	47	114	191
Other East Herts	n/a	25	81	168	266
Total	**n/a**	**-9,214**	**-5,757**	**-326**	**5,787**
Floorspace Requirement (sq.m gross)					
Hertford	n/a	120	987	2,367	3,919
Ware	n/a	-803	-424	178	855
Bishop's Stortford	n/a	-11,647	-8,484	-3,541	2,025
Buntingford	n/a	7	75	185	307
Sawbridgeworth	n/a	5	62	153	254
Other East Herts	n/a	33	108	224	354
Total	**n/a**	**-12,285**	**-7,676**	**-435**	**7,715**

** commitments added at 2016*

Source: Tables 5 to 11

Appendix 4 Audit of Centres

A. Hertford

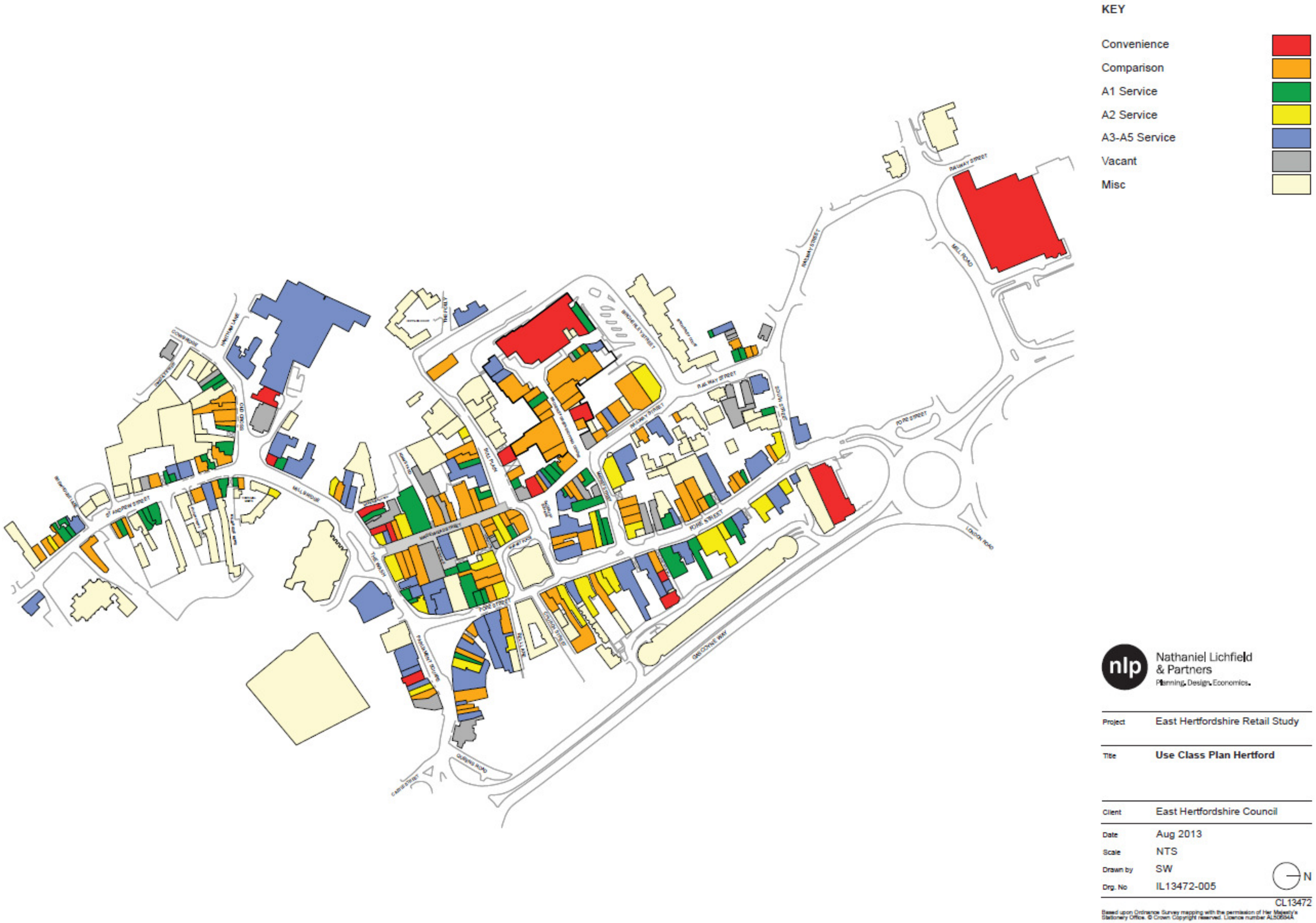
Hertford, together with Bishop's Stortford, is one of the main shopping and commercial centres within East Herts, and is located in the north west of the District. The centre has a variety of retail and service uses, and is one of the administrative centres for East Herts.

Figure A.1 Aerial View of Hertford Town Centre

The key roles of Hertford include:

- **Convenience shopping:** Tesco is the main food store destination and this is located outside the primary and secondary shopping frontages. Within the primary and secondary shopping frontages there is a Waitrose and Marks and Spencer Simply Food. Convenience provision is supported by a small selection of bakers, newsagents, confectioners and food specialists;
- **Comparison shopping:** there is a mix of national multiple retailers and small independent traders. Most national multiples are located within the Bircherley Green Shopping Centre. The majority of the small independent traders are located in the secondary shopping frontage, particularly along Old Cross, Fore Street and Parliament Square;
- **Services:** provides a good range and choice of services including high street banks, estate agents, hairdressers, cafes, restaurants, pubs and takeaways;
- **Entertainments:** a cinema and theatre;
- **Community facilities:** medical surgeries, library and civic offices.

Figure A.2 Goad Plan of Hertford Town Centre



Mix of Uses and Occupier Representation

Hertford has a total of 240 retail/service uses.

The diversity of uses present in Hertford in terms of the number of units is set out in Table A.1, compared against the national average.

Table A.1 Hertford Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	90	37.5	40.86
Convenience Retail	15	6.3	8.58
A1 Services (2)	43	17.9	11.70
A2 Services	20	8.3	9.14
A3/A5	38	15.8	16.05
Vacant (3)	34	14.2	13.67
Total	**240**	**100.0**	**100.0**

Source: Goad Plans March 2012
(1) UK average for all town centres surveyed by Goad Plans (November 2012)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) Goad Plans March 2012, updated by NLP June 2013

The centre's mix of units is broadly similar to the national average, but with a higher proportion of Class A1 services. The proportion of comparison and convenience retail units is only marginally lower than the national average. The vacancy rate of this centre, is broadly in line with the national average, which suggests the health of the centre in this respect is satisfactory.

Retailer Representation

Hertford has a good selection of comparison shops (90) reflecting its size and role in the shopping hierarchy in the District. Table A.2 provides a breakdown of comparison shop units by category.

Table A.2 Hertford Breakdown of Comparison Units

Type of Unit	Hertford		% UK Average*
	Units	%	
Clothing and footwear	22	24.4	25.6
Furniture, carpets and textiles	9	10.0	8.3
Booksellers, arts, crafts and stationers	10	11.1	10.9
Electrical, gas, music and photography	6	6.7	9.5
DIY, hardware and homewares	6	6.7	6.2
China, glass, gifts and fancy goods	4	4.4	3.9
Cars, motorcycles and motor access	2	2.2	2.9
Chemists, drug stores and opticians	11	12.2	9.4
Variety, department and catalogue	0	0.0	1.4
Florists, nurserymen and seedsmen	3	3.3	2.2
Toys, hobby, cycle and sport	3	3.3	5.1
Jewellers	7	7.8	4.9

Type of Unit	Hertford		% UK Average*
	Units	%	
Other comparison retailers	7	7.8	9.7
Total	**90**	**100.0**	**100.00**

Source: Goad Plan March 2012
*UK average for all town centres surveyed by Goad Plans (November 2012)

The centre provides most of the Goad Plan comparison categories apart from variety, department and catalogue. There is a good range of clothing and footwear shops which account for nearly a quarter of the comparison provision, similar to the national average. There is also a good provision of furniture/carpets/textiles, booksellers/arts/crafts/stationers and chemists/drug stores/opticians. There are five charity shops within the 'other comparison retailers' category.

Retail Rents

Prime Zone A retail rents in Hertford declined between 2008 and 2009, from £646 per sq.m to £592 per sq.m. Rents remained the same, at £592 per sq.m in 2010 (source: Colliers International Retail Rents, 2010).

Service Uses

Hertford has a good range of non-retail service uses, with all categories present and well represented (see Table A.3). As indicated earlier, there is a high provision of Class A1 uses and this is attributed to the large proportion of hairdresser/ beauty parlours which is significantly above the national average, 35.1%. The good range of services in Hertford reflects its day to day shopping and service role.

Table A.3 Hertford Analysis of Selected Service Uses

Type of Unit	Hertford		% UK Average*
	Units	%	
Restaurants/cafes/takeaways	38	39.2	44.9
Banks/other financial services	8	8.2	13.4
Estate agents/valuers	10	10.3	10.6
Travel agents	3	2.9	3.3
Hairdressers/beauty parlours	34	35.1	25.2
Laundries/dry cleaners	4	4.1	2.6
Total	**97**	**100.0**	**100.00**

Source: Goad Plan March 2012
*UK average for all town centres surveyed by Goad Plans (November 2012)

Vacant Units

There were 34 vacant retail units within Hertford at the time of the Goad survey, giving a vacancy rate of 14.2%, marginally above the national average of 13.7%. The main cluster of vacant units is on Railway Street.

Accessibility

The centre is served by a number of car parks which were all well used at the time of our visit; St Andrew Street car park, Waitrose multi-storey and the multi-storey adjacent to Gascoyne Way. The bus station is located behind the Bircherley Shopping Centre on Bircherley Street providing good and easy access to the centre for visitors. Bus services to/from Hertford serve neighbouring and larger centres including Waltham Cross, Bishop's Stortford, Stevenage, Welwyn Garden City, Ware and Harlow.

Shopper Views

Respondents to the household survey were asked what, if anything would make them shop more often in Hertford. In the study area as a whole, 36.2% indicated nothing would make them shop more often in Hertford and 20.5% indicated they did not know, therefore over 50% did not suggest any improvements in Hertford. Over 20% mentioned a better choice of shops in general, followed by 10.8% who stated more/easier car parking. The next most suggested improvements were better choice of clothing shops (8.3%) and free car parking (7.6%). No other answer achieved more than 5%.

Stakeholder Comments

Stakeholders with an interest in the future of town centres in East Herts were asked for comments and input, particularly concerning the following issues:

1 strengths of the centres in East Herts;

2 weaknesses of the centres in East Herts;

3 key problems that need to be addressed;

4 what could be done better; and

5 what future aspirations should East Herts have for its centres.

We have received the following comments and suggestions in relation to Herford

1 Parking – Hertford needs some 1hour free slots or free on Sundays and after 3pm to encourage serious shoppers to pop in; also people like to park then pay on exit not guess how long they will need on arrival;

2 Need to have more events, for example "experiences" such as jazz nights, theme events, and these should be marketed widely;

3 Need to encourage younger generation to come and shop, for example have milk shake bars, social clubs and spaces for them to enjoy;

4 People of all ages need to feel safe to come into the town in evenings after dark and support community and night economy;

5 Need to create excellence in retail experience;

6 Shop keepers/retailers should not close half days on a Thursday (a few do) and should be more proactive. Hertford has struggled getting

retailers out to 'Focal Local' meetings that want to encourage local shopping; and

7 All retailers should have an online/web offering as well.

Summary of Hertford's Strengths and Weaknesses

Strengths

- The centre provides a reasonable range and mix of national and independent comparison retailers.
- The Tesco, Waitrose and M&S Simply Food stores cater for both main and top up food shopping. The Waitrose store acts as an important anchor to the Bircherley Shopping Centre.
- The centre has a good range and choice of non-retail services.
- The centre's vacancy level is broadly similar to the national average.
- Market stalls in Salisbury Square and Market Place and outdoor café seating areas in Parliament Square create a lively street scene.
- The core of the centre is pedestrianised creating an attractive and safe shopping environment.
- There are good leisure and entertainment facilities including a cinema, theatre and a good range of restaurants and cafes.
- Overall the shopping environment is well maintained and pleasant.

Weaknesses

- The eastern end of Railway Street is poorly integrated with the core of the town centre. The vacant Marquee building provides a development opportunity to rejuvenate this part of the centre.
- The street environment along Maidenhead Street lacks interest and the cluster of vacant units which is developing in this part of the centre has an adverse impact on the street scene.
- Narrow streets and pavements hinder pedestrian movements in parts of the centre.

B. Bishop's Stortford

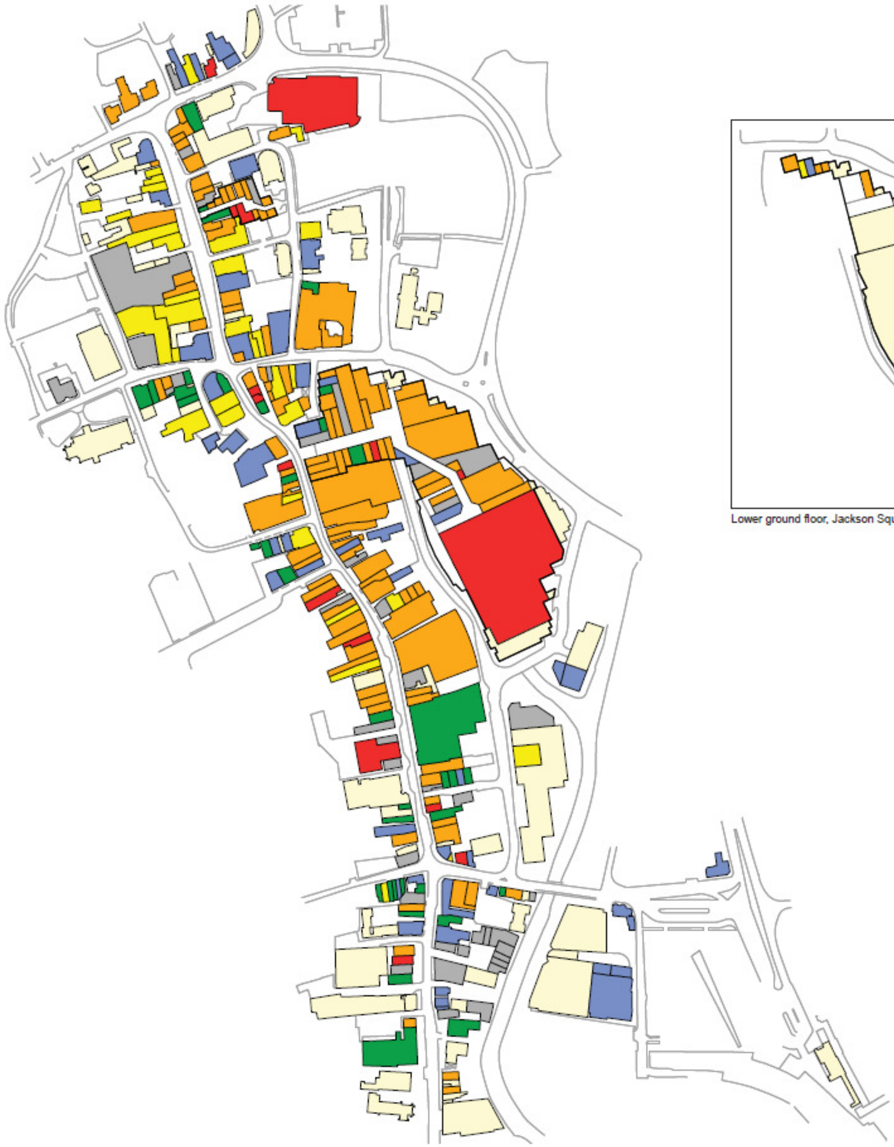
Bishop's Stortford, along with Hertford, is one of the main shopping and commercial centres within East Herts, and is located to the east of the District.

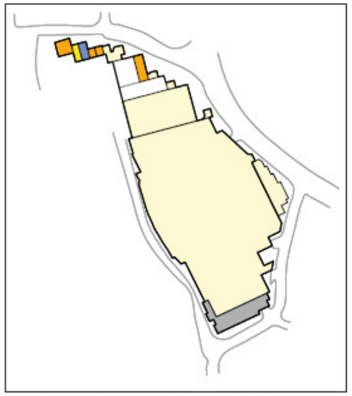
Figure B.1 Aerial View of Bishop's Stortford Town Centre

The key roles of Bishop's Stortford include:

- **Convenience shopping:** Sainsbury's in the Jackson Square Shopping Centre is the main food store destination. There is also a Waitrose on Northgate End, a food hall within the Marks and Spencer and a Tesco Express on South Street. Convenience provision is supported by a small selection of bakers, newsagents, confectioners and food specialists;
- **Comparison shopping:** the centre predominantly comprises national multiple retailers located in the Jackson Square Shopping Centre, Potters Street and South Street;
- **Services:** good range and choice of services including high street banks, estate agents, hairdressers, cafes, restaurants, pubs and takeaways;
- **Entertainments:** a cinema, bowling alley and healthclub;
- **Community facilities:** medical surgeries, library and civic offices.

Figure B.2 Goad Plan of Bishop's Stortford Town Centre





Lower ground floor, Jackson Square Shopping Centre

KEY

- Convenience
- Comparison
- A1 Service
- A2 Service
- A3-A5 Service
- Vacant
- Misc

Nathaniel Lichfield & Partners
Planning. Design. Economics.

Project	East Hertfordshire Retail Study
Title	**Use Class Plan Bishops Stortford**
Client	East Hertfordshire Council
Date	July 2013
Scale	NTS
Drawn by	SW
Drg. No	IL13472-004

N

CL13472

Mix of Uses and Occupier Representation

Bishop's Stortford has a total of 283 retail/service uses. The diversity of uses present in Bishop's Stortford in terms of the number of units is set out in Table B.1, compared against the national average.

Table B.1 Bishop's Stortford Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	124	43.8	40.86
Convenience Retail	17	6.0	8.58
A1 Services (2)	37	13.1	11.70
A2 Services	29	10.2	9.14
A3/A5	40	14.1	16.05
Vacant (3)	36	12.7	13.67
Total	**283**	**100.0**	**100.0**

Source: Goad Plans April 2012
(1) UK average for all town centres surveyed by Goad Plans (November 2012)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) Goad Plans April 2012, updated by NLP June 2013

The centre's mix of units is broadly similar to the national average, but consistent with its position in the shopping hierarchy, Bishop's Stortford has a relatively higher proportion of comparison shops and a lower proportion of convenience shops. The vacancy rate of this centre is broadly in line with the national average, 1% lower.

Retailer Representation

Bishop's Stortford has a good selection of comparison shops (124) when compared with other centres in the District, reflecting its role in the retail hierarchy in the District. Table B.2 provides a breakdown of comparison shop units by category.

Table B.2 Bishop's Stortford Breakdown of Comparison Units

Type of Unit	Bishop's Stortford		% UK Average*
	Units	%	
Clothing and footwear	43	34.7	25.6
Furniture, carpets and textiles	6	4.8	8.3
Booksellers, arts, crafts and stationers	10	8.1	10.9
Electrical, gas, music and photography	12	9.7	9.5
DIY, hardware and homewares	10	8.1	6.2
China, glass, gifts and fancy goods	1	0.8	3.9
Cars, motorcycles and motor access	1	0.8	2.9
Chemists, drug stores and opticians	14	11.3	9.4
Variety, department and catalogue	4	3.2	1.4
Florists, nurserymen and seedsmen	2	1.6	2.2
Toys, hobby, cycle and sport	7	5.6	5.1

Type of Unit	Bishop's Stortford		% UK Average*
	Units	%	
Jewellers	7	5.6	4.9
Other comparison retailers	7	5.6	9.7
Total	**124**	**100.0**	**100.00**

Source: Goad Plan April 2012
*UK average for all town centres surveyed by Goad Plans (November 2012)

The centre provides all of the Goad Plan comparison categories. There is a good range of clothing and footwear shops and chemists/drug stores/opticians and the proportion of both these categories is above the national average. The categories with the smallest provision in Bishop's Stortford are china/glass/gifts/fancy goods and cars/motorcycles/motor access. There are six charity shops and one disabled goods and equipment shop in the 'other comparison retailers' category.

Retail Rents

Prime Zone A retail rents in Bishop's Stortford declined between 2008 and 2009, from £969 per sq.m to £861 per sq.m. Rents remained the same, at £861 per sq.m in 2010 (source: Colliers International Retail Rents, 2010).

Service Uses

Bishop's Stortford has a good range of non-retail service uses, with all categories present and well represented (see Table B.3). Representation of hairdressers, estate agents, banks and restaurants/cafes is broadly in line with the national average, reflecting the size of Bishop's Stortford and its service role in the shopping hierarchy.

Table B.3 Bishop's Stortford Analysis of Selected Service Uses

Type of Unit	Bishop's Stortford		% UK Average*
	Units	%	
Restaurants/cafes/takeaways	42	41.2	44.9
Banks/other financial services	13	12.7	13.4
Estate agents/valuers	14	13.7	10.6
Travel agents	4	3.9	3.3
Hairdressers/beauty parlours	26	25.5	25.2
Laundries/dry cleaners	3	2.9	2.6
Total	**102**	**100.0**	**100.00**

Source: Goad Plan April 2012
*UK average for all town centres surveyed by Goad Plans (November 2012)

Vacant Units

There were 36 vacant retail units within Bishop's Stortford at the time of the Goad survey, giving a vacancy rate of 12.7%, below the national average of 13.7%. There is one evident cluster of vacant units in the centre located at the southern end of the secondary shopping frontage on the east side of South Street.

Accessibility

The main car park serving Bishop's Stortford is the multi-storey which forms part of the Jackson Square Shopping Centre. This car park was well used at the time of our survey of the centre. The main bus stops are well located, a short distance from the primary and secondary shopping frontages. Bus services connect Bishop's Stortford with nearby centres including Saffron Walden, Stansted Airport, Harlow, Wicken Bonhunt and Elmdon. The train station is also located a short walk from the centre and provides connection to London Liverpool Street, Stansted Airport, Cambridge, Ely and Kings Lynn.

Shopper Views

Respondents to the household survey were asked what, if anything, would make them shop more in Bishop's Stortford. In the study area as a whole, 37.8% indicated nothing would make them shop more often in Bishop's Stortford and 22.7% indicated they did not know, therefore around 60% did not suggest any improvements in Bishop's Stortford. The main answer given was better choice of shops in general (18.6%), followed by more car parking (10.2%). The next most suggested improvement was better choice of clothing shops (5.8%) and free car parking (5.5%). No other answer achieved more than 5% across the study area. In the Bishop's Stortford Urban Area (Zone 3A), 7.3% mentioned more large shops and 6% stated better quality shops. In the Bishop's Stortford Rural Area (Zone 3B) 17.3% mentioned improved bus services, 9.3% stated free car parking, 8.4% mentioned better quality shops and 5.3% suggested more large shops.

Summary of Bishop Stortford's Strengths and Weaknesses

Strengths

- The shopping environment in the north of the centre from Northgate End and south to South Street is well maintained and pleasant.
- The centre has a good range of comparison shops.
- The new Jackson Square Shopping Centre acts as an important anchor attracting customers to the town centre.
- The Sainsbury's and Waitrose stores cater for both main and top up food shopping. The Tesco Express provides for small scale and top up food shopping.
- The Jackson Square Shopping Centre car park provides a large number of car parking spaces.

Weaknesses

- Vehicle traffic travelling along South Street and Potter Street can impede pedestrian movements.
- The shopping environment at the southern end of South Street (in the secondary shopping frontage) is poor with a cluster of vacant units.
- Through traffic can become congested at the northern end of Potter Street, impeding pedestrian flows.

C. Ware

Ware is a small market town, located in the south of the District.

Figure C.1 Aerial View of Ware Town Centre

The key roles of Ware include:

- **Convenience shopping:** Tesco is the main food shopping destination and this is supported by a number of small convenience stores and independent butchers, bakers and delicatessens;
- **Comparison shopping:** reasonable range of comparison shops and predominantly independent traders serving day to day shopping needs. Boots, Orange, Clintons and Peacocks are the main national multiples in the centre;
- **Services:** provides a range of services including cafes, restaurants, takeaways, hairdressers, travel agents, estate agents, banks and dry cleaners;
- **Community facilities:** provides a range of community services including a library and doctors surgery. Market stalls in Tudor Square and along West Street were trading at the time of our survey of the centre.

Figure C.2 Goad Plan of Ware Town Centre

Mix of Uses and Occupier Representation

Ware has a total of 156 retail/service uses. The diversity of uses present in Ware in terms of the number of units is set out in Table C.1, compared against the national average.

Table C.1 Ware Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	52	33.3	40.86
Convenience Retail	12	7.7	8.58
A1 Services (2)	24	15.4	11.70
A2 Services	19	12.2	9.14
A3/A5	30	19.2	16.05
Vacant (3)	19	12.2	13.67
Total	**156**	**100.0**	**100.0**

Source: Goad Plans December 2011
(1) UK average for all town centres surveyed by Goad Plans (November 2012)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) Goad Plans December 2011, updated by NLP June 2013

The centre's mix of units reflects its position in the shopping hierarchy providing for service and day to day shopping needs. Reflecting its size and role, the provision of comparison retail units is below the national average. The provision of convenience retail is slightly below the national average. Service uses are above the national average, particularly the provision of Class A1 and A2 services. The vacancy rate of this centre is below the national average.

Retailer Representation

Ware has a smaller selection of comparison shops (53) when compared with Hertford and Bishop's Stortford, reflecting its role in the retail hierarchy in the District. Table C.2 provides a breakdown of comparison shop units by category.

Table C.2 Ware Breakdown of Comparison Units

Type of Unit	Ware		% UK Average*
	Units	%	
Clothing and footwear	5	9.6	25.6
Furniture, carpets and textiles	5	9.6	8.3
Booksellers, arts, crafts and stationers	9	17.3	10.9
Electrical, gas, music and photography	4	7.7	9.5
DIY, hardware and homewares	4	7.7	6.2
China, glass, gifts and fancy goods	1	1.9	3.9
Cars, motorcycles and motor access	0	0.0	2.9
Chemists, drug stores and opticians	7	13.5	9.4
Variety, department and catalogue	1	1.9	1.4
Florists, nurserymen and seedsmen	3	5.8	2.2
Toys, hobby, cycle and sport	3	5.8	5.1

Type of Unit	Ware		% UK Average*
	Units	%	
Jewellers	4	7.7	4.9
Other comparison retailers	6	11.5	9.7
Total	**52**	**100.0**	**100.00**

Source: Goad Plan December 2011
*UK average for all town centres surveyed by Goad Plans (November 2012)

The centre provides all of the Goad Plan comparison categories with the exception of cars/motorcycles/motor access. There is a good range of booksellers/arts/crafts/stations and chemists/drug stores/opticians and the proportion of both these categories is significantly above the national average. The provision of 'other comparison retailers' is also above the national average in Ware and this provision comprises four charity shops, a pet store and a disabled goods and equipment shop.

Service Uses

Ware has a good range of non-retail service uses in particular, the provision of restaurants/cafes/takeaways is just above the national average, accounting for nearly half of the service provision in the town centre. All categories of service uses are present in Ware (see Table C.3).

Table C.3 Ware Analysis of Selected Service Uses

Type of Unit	Ware		% UK Average*
	Units	%	
Restaurants/cafes/takeaways	33	45.8	44.9
Banks/other financial services	8	11.1	13.4
Estate agents/valuers	10	13.9	10.6
Travel agents	1	1.4	3.3
Hairdressers/beauty parlours	18	25.0	25.2
Laundries/dry cleaners	2	2.8	2.6
Total	**72**	**100.0**	**100.00**

Source: Goad Plan December 2011
*UK average for all town centres surveyed by Goad Plans (November 2012)

Vacant Units

There were 19 vacant retail units within Ware at the time of the Goad survey, giving a vacancy rate of 12.2%, below the national average of 13.7%. The vacant units are distributed throughout the centre and there are no evident clusters.

Accessibility

The centre is served by a small cluster of surface level car parks at Kibes Lane. At the time of our visit these car parks were well used, but they were not at capacity. Ware Railway Station is located at the southern edge of the centre and provides connections to London Liverpool Street and Hertford East (two services an hour). Bus stops are distributed throughout the centre, including a centrally located stop on High Street. Bus services provide connections to Hertford, Stevenage and Bishop's Stortford.

Shopper Views

Respondents to the household survey were asked what, if anything, would make them shop more in Ware. In the study area as a whole, 43.6% indicated nothing would make them shop more often in Ware and 28.8% indicated they did not know, therefore over 70% did not suggest any improvements in Ware. The main answer given was better choice of shops in general (11.7%), and 5.0% specifically mentioned better choice of clothing shops. No other answer achieved more than 5% across the study area. Within the Ware zone (Zone 2), 11.5% suggested more/easier car parking and 10.3% mentioned free car parking. 7.9% of respondents in Zone 2 suggested more food supermarkets and 5.5% mentioned better quality shops.

Summary of Ware's Strengths and Weaknesses

Strengths

- The centre has a mix of shops and services that meet day to day and local shopping needs.
- The Tesco store acts as an important anchor attracting customers to the centre.
- The shopping environment is generally well maintained and attractive, in particular the small historic streets which run parallel to High Street for example, West Street and East Street.

Weaknesses

- Vehicle traffic through the centre can be busy at times and provides a barrier for pedestrian movements.
- The provision of leisure and entertainment facilities, other than restaurants and pubs, is limited.

D. Sawbridgeworth

Sawbridgeworth is a small centre located in the east of the District, south of Bishop's Stortford.

Figure D.1 Aerial View of Sawbridgeworth

The key roles of Sawbridgeworth include:

- **Convenience shopping:** Budgens is the main store for convenience food shopping in Sawbridgeworth providing primarily for top up food shopping. Convenience shopping is supported by a couple of newsagents, bakers, a butcher and a health food store;
- **Comparison shopping:** a limited range of comparison shops and predominantly independent traders serving day to day shopping needs. There are no national multiple comparison retailers;
- **Services:** provides a range of services including restaurants, cafes, takeaways, banks, estate agents, hairdressers and a dry cleaner.

Mix of Uses and Occupier Representation

Sawbridgeworth has 66 retail/service units. The diversity of uses present in Sawbridgeworth in terms of the number of units is set out in Table D.1, compared against the national average.

Table D.1 Sawbridgeworth Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	23	34.8	40.86
Convenience Retail	8	12.1	8.58
A1 Services (2)	12	18.2	11.70
A2 Services	9	13.6	9.14
A3/A5	7	10.6	16.05
Vacant (3)	7	10.6	13.67
Total	**66**	**100.0**	**100.0**

Source: Goad Plans January 2013
(1) UK average for all town centres surveyed by Goad Plans (November 2012)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) Goad Plans January 2013, updated by NLP June 2013

Consistent with its position in the shopping hierarchy, Sawbridgeworth has a relatively high proportion of convenience shops and non-retail services (with the exception of Class A3/A5 services), and conversely a lower proportion of comparison shops. The vacancy level in Sawbridgeworth is low, 3% below the national average.

Retailer Representation

Sawbridgeworth has a smaller selection of comparison shops (23) compared to Ware, reflecting its role in the retail hierarchy in the District. Table D.2 provides a breakdown of comparison shop units by category. Many of the Goad comparison retailers are not represented and the choice of shops in other categories is limited to one or two shops.

Table D.2 Sawbridgeworth Breakdown of Comparison Units

Type of Unit	Sawbridgeworth		% UK Average*
	Units	%	
Clothing and footwear	6	26.1	25.6
Furniture, carpets and textiles	1	4.3	8.3
Booksellers, arts, crafts and stationers	2	8.7	10.9
Electrical, gas, music and photography	0	0.0	9.5
DIY, hardware and homewares	2	8.7	6.2
China, glass, gifts and fancy goods	2	8.7	3.9
Cars, motorcycles and motor access	0	0.0	2.9
Chemists, drug stores and opticians	3	13.0	9.4
Variety, department and catalogue	0	0.0	1.4
Florists, nurserymen and seedsmen	1	4.3	2.2
Toys, hobby, cycle and sport	1	4.3	5.1
Jewellers	3	13.0	4.9
Other comparison retailers	2	8.7	9.7
Total	**23**	**100.0**	**100.00**

Source: Goad Plan January 2013
*UK average for all town centres surveyed by Goad Plans (November 2012)

Figure D.2 Goad Plan of Sawbridgeworth

Although not all of the Goad categories are present in Sawbridgeworth, the centre includes a number of specialist comparison retailers, particularly in the jewellers category.

Service Uses

Sawbridgeworth has a good range of service uses, with all provided for in the centre with the exception of travel agents. The provision of hairdressers is particularly high when compared to the national average (see Table D.3).

Table D.3 Sawbridgeworth Analysis of Selected Service Uses

Type of Unit	Sawbridgeworth		% UK Average*
	Units	%	
Restaurants/cafes/takeaways	7	25.0	44.9
Banks/other financial services	5	17.8	13.4
Estate agents/valuers	4	14.3	10.6
Travel agents	0	0.0	3.3
Hairdressers/beauty parlours	11	39.3	25.2
Laundries/dry cleaners	1	3.6	2.6
Total	**28**	**100.0**	**100.00**

Source: Goad Plan January 2013
*UK average for all town centres surveyed by Goad Plans (November 2012)

Vacant Units

There were seven vacant shop units within Sawbridgeworth at the time of the Goad survey (January 2013, updated by NLP June 2013). This gives a vacancy rate of 10.6% which is 3% below the national average of 13.7%.

Accessibility

Sawbridgeworth worth has a number of surface level car parks behind the shopping frontage along Bell Street which are well used, but were not at capacity at the time of our visit. Bus services to Harlow and Bishop's Stortford are available from London Road.

Shopper Views

Respondents to the household survey were asked what, if anything, would make them shop more in Sawbridgeworth. In the study area as a whole, 45.6% indicated nothing would make them shop more often in Sawbridgeworth and 39.9% did not know. Therefore around 85% of respondents did not suggest any improvements in Sawbridgeworth. The main answer given was better choice of shops in general (8.0%). No other answer achieved more than 3% across the study area. Within the Sawbridgeworth zone (Zone 6), 26.4% of respondents suggested better choice of shops in general, followed by better choice of clothing shops (8%) and better quality shops (6.4%).

Summary of Sawbridgeworth's Strengths and Weaknesses

Strengths

- The one way system along Bell Street means that through traffic is limited creating a pleasant shopping environment.
- The Budgens store and small convenience units cater predominantly for top up food shopping.
- The centre has a low number of vacant units.
- The centre has a mix of shops and services that meet day to day and local shopping needs.

Weaknesses

- Narrow pavements in places due to the historic character of the centre.
- Many shop units are small period buildings that do not meet the modern requirements of many operators.

E. Buntingford

Buntingford is the smallest centre in the District and is located in the north of East Herts.

Figure E.1 Aerial View of Buntingford

The key roles of Buntingford include:

- **Convenience shopping:** The Co-operative is the main store for convenience food shopping in Buntingford providing for primarily top up food shopping. Top up convenience food shopping is supported by Sainsbury's Local and a few independent butchers and a baker;
- **Comparison shopping:** a very limited range of comparison shops and predominantly independent traders serving day to day shopping needs. There are no national multiple comparison retailers;
- **Services:** provides a limited range of services including restaurants, cafes, takeaways, hairdressers, banks and estate agents.

Figure E.2 Goad Plan of Buntingford

Mix of Uses and Occupier Representation

Buntingford has 46 retail/service units and is the smallest centre in the District. The diversity of uses present in Buntingford in terms of the number of units is set out in Table E.1, compared against the national average.

Table E.1 Buntingford Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	17	36.9	40.86
Convenience Retail	7	15.2	8.58
A1 Services (2)	9	19.6	11.70
A2 Services	4	8.7	9.14
A3/A5	8	17.4	16.05
Vacant (3)	1	2.2	13.67
Total	**46**	**100.0**	**100.0**

Source: Goad Plans July 2011
(1) UK average for all town centres surveyed by Goad Plans (November 2012)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) Goad Plans July 2011, updated by NLP June 2013

Consistent with its position in the shopping hierarchy, Buntingford has a relatively high proportion of convenience shops. Provision of Class A1 services is above the national average however, provision of Class A2 and A3/A5 services is broadly similar to the national average. The vacancy level in Buntingford is very low at 2.2%.

Retailer Representation

Buntingford has a limited range of comparison shops (16), reflecting its role in the retail hierarchy in the District. Table E.2 provides a breakdown of comparison shop units by category. Around half of the Goad comparison retailers are not represented and the choice of shops in other categories is limited to one or two shops.

Table E.2 Buntingford Breakdown of Comparison Units

Type of Unit	Buntingford		% UK Average*
	Units	%	
Clothing and footwear	2	11.8	25.6
Furniture, carpets and textiles	0	0.0	8.3
Booksellers, arts, crafts and stationers	1	5.9	10.9
Electrical, gas, music and photography	0	0.0	9.5
DIY, hardware and homewares	3	17.6	6.2
China, glass, gifts and fancy goods	1	5.9	3.9
Cars, motorcycles and motor access	0	0.0	2.9
Chemists, drug stores and opticians	3	17.6	9.4
Variety, department and catalogue	0	0.0	1.4
Florists, nurserymen and seedsmen	3	17.6	2.2
Toys, hobby, cycle and sport	0	0.0	5.1

Type of Unit	Buntingford		% UK Average*
	Units	%	
Jewellers	1	5.9	4.9
Other comparison retailers	3	17.6	9.7
Total	**17**	**100.0**	**100.00**

Source: Goad Plan July 2011
*UK average for all town centres surveyed by Goad Plans (November 2012)

Service Uses

Buntingford has a limited range of service uses, with two Goad categories not present in the centre and many other categories only represented by just one or two shops. Restaurants/cafes/takeaways and hairdressers are the predominant service uses in Buntingford, accounting for around 38% of units (see Table E.3).

Table E.3 Buntingford Analysis of Selected Service Uses

Type of Unit	Buntingford		% UK Average*
	Units	%	
Restaurants/cafes/takeaways	8	38.1	44.9
Banks/other financial services	2	9.5	13.4
Estate agents/valuers	2	9.5	10.6
Travel agents	0	0.0	3.3
Hairdressers/beauty parlours	8	38.1	25.2
Laundries/dry cleaners	1	4.8	2.6
Total	**21**	**100.0**	**100.00**

Source: Goad Plan July 2011
*UK average for all town centres surveyed by Goad Plans (November 2012)

Vacant Units

There was only one vacant shop unit within Buntingford at the time of the Goad survey (July 2011, updated by NLP June 2013). This gives a very low vacancy rate of only 2.2% which is significantly below the national average of 13.7%.

Accessibility

Buntingford has one surface level car park behind High Street which was well used, but not at capacity at the time of our visit. Two bus routes provide regular service to/from Buntingford to Hertford, Royston, Stevenage and Stansted Airport.

Shopper Views

Respondents to the household survey were asked what, if anything, would make them shop more in Buntingford. In the study area as a whole, 52.4% indicated they did not know and 40.3% indicated nothing would make them shop more often in Buntingford. The main answer given was better choice of shops in general (3.4%). No other answer achieved more than 3% across the study area. Within the Buntingford zone (Zone 5), 17.5% identified better choice of shops in general and in particular better choice of clothing shops (5.6%).

Summary of Buntingford's Strengths and Weaknesses

Strengths

- Attractive and quiet shopping environment.
- Very low vacancy level.
- The Co-operative store south of the main shopping frontage provides for main food shopping and this is supported by Sainsbury's Local on High Street which provides for top up shopping.

Weaknesses

- Shops south of Baldock Road can become disjointed from the rest of the centre.
- The range and choice of shops and services is very limited.
- The provision of leisure and entertainment facilities other than restaurants and pubs is limited.

Local Needs Index

The existing provision of local shopping centres within the District (local centres and parades) offers a balanced distribution of local facilities serving local communities. These facilities complement the five main centres and have an important role in serving the day-to-day needs in their local areas.

In addition to the audit of the main centres in East Herts, we have undertaken a local needs index of the local centres and parades within the district. Our analysis splits the centres into “large” (more than 45 commercial units), “medium” (between 16 and 44 commercial units) or “small” (15 commercial units or less).

The shopping centres, parades and clusters vary in size, from only three commercial units (Cromwell Road, Ware) to as large as 283 (Bishop’s Stortford town centre). In summary, East Herts contains:

- 12 centres classified as small;
- 3 centres classified as medium; and
- 5 centres classified as large.

The key focus in auditing local centres has been in assessing the *“needs”* of local residents and to what extent each is meeting these *“needs”*. There is no clear definition of need, but it is considered that residents could expect to find some or all of the following shops, services and community uses within easy walking distance of their home:

8 food or convenience store suitable for top-up shopping;

9 bank;

10 post office;

11 newsagent;

12 off licence;

13 chemist;

14 takeaway, café or restaurant;

15 public house;

16 bookmakers;

17 laundrette/dry cleaners;

18 hairdressers/beauty salon;

19 florist;

20 estate agents;

21 community hall;

22 doctor’s surgery; and

23 library.

Each local centre has been allocated a score out of 16, based on the number of categories of shops and services listed above (one point per category represented) that are available in the centre.

There is a wide range of scores across the centres. These scores are based on the representation of key retail/service provision within the centre. The larger town centres have the highest scores (10 or more on the local needs index).

In addition to this it is important to consider the ability of these centres in meeting top-up shopping needs. Therefore, the number of convenience stores with the ability to provide local top-up shopping (eg. a grocers, local corner shop or small supermarket) in the parade is also considered.

Local Needs Index Summary

Centre Name	Size of Centre	Total No. of Units	Local Needs Index	No. of Convenience Stores	No. of Vacant Units
Bishop's Stortford	Large	283	16	5	36
Hertford	Large	240	15	4	34
Ware	Large	156	15	3	19
Sawbridgeworth	Large	66	10	3	7
Buntingford	Large	46	14	3	1
Hockerill Street	Medium	39	8	1	4
Stanstead Abbotts	Medium	32	10	1	2
Thorley Neighbourhood Centre	Medium	16	8	1	1
Havers Parade	Small	11	6	1	0
Snowley Parade	Small	11	8	1	0
Watton-at-Stone	Small	10	5	1	0
Puckeridge	Small	9	6	1	1
Kingshill	Small	9	4	1	0
Fleming Crescent	Small	8	6	1	0
Standon	Small	8	6	1	0
Bishop's Park	Small	5	4	1	1
The Avenue	Small	5	4	0	0
Braughling	Small	5	3	1	0
Much Hadham	Small	4	3	1	0
Cromwell Road	Small	3	2	1	0

Bishop's Stortford town centre provides all of the identified categories of shops and services, scoring 16 on the local needs index, which would suggest the local residents of the this area are relatively well served by their local shopping centre. By contrast, Cromwell Road, Much Hadham and Braughling only attract a score of 3 or less on the local needs index, which would suggest a very limited level of local needs being met.

The local needs index is not a precise measure of whether a local shopping centre is meeting the needs of local residents, as there are many other factors to consider:

- the relative size a local parade will dictate the range of shops and services each centre can offer;
- the close proximity of other town centres, local centres and '*stand alone*' shops means that local need may be met at an alternative location within walking distance and local needs are therefore still being met;
- the quality of the shopping centre or parade, in terms of its environment, type and range of retailers will affect how it is perceived and used by local residents; and
- the relative accessibility of each centre will be an important factor in how local people use the local shops and services. For example, a major traffic route, which is difficult for pedestrians to cross, may influence shopping patterns in the area.

It is considered that the local needs index provides a useful indicator of whether a local centre or important local parade is meeting some or all the needs of local residents.

Appendix 5 Household Survey Results

Household Survey Results

Survey Structure

NEMS Market Research carried out a telephone survey of 1,000 households across the EHDC study area in May and June 2013. The study area was split into six zones, based on postcode sectors.

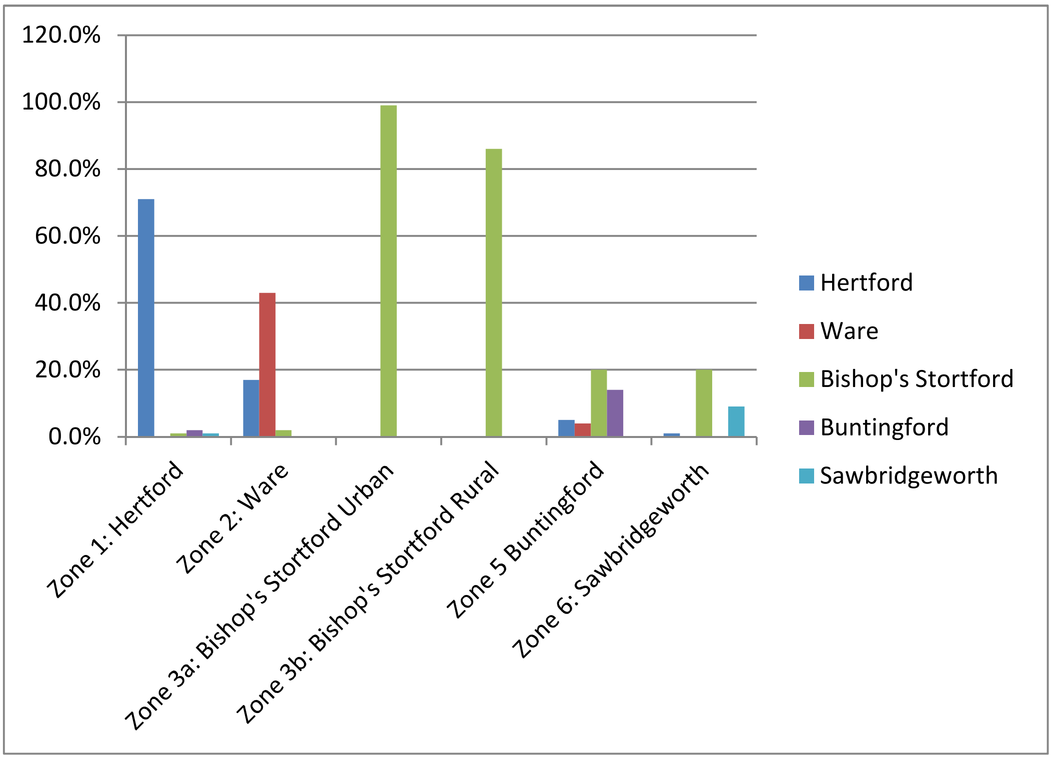
The number of interviews undertaken reflects the population in each zone in order to provide statistically reliable sub-samples. The main aims of the survey were to establish patterns for the following:

- Main food and top up grocery shopping;
- Non-food shopping, including:
  - clothing and footwear;
  - domestic electrical appliances;
  - other electrical goods (TV, Hi-Fi and computers);
  - furniture, soft furnishing or carpets;
  - DIY/hardware items and garden items;
  - chemist, health and beauty items; and
  - other non-food items (eg. books, CDs, DVDs, toys and gifts).

Main Food Shopping

Large food stores are the primary destination for main food shopping trips across the study area. Overall, the Sainsbury’s store at Thorley, Bishop’s Stortford was the most popular shopping destination (9.3%), followed by the Tesco store at Hertford (8.8%), Tesco at Ware (7.2%), Sainsbury’s at Jackson Square, Bishop’s Stortford (6.6%) and Tesco in Harlow (6.3%) for the study area as a whole. Home shopping /the internet were used by 5.4% of respondents. The market share of main food shopping for each town in EHDC is shown in the graph below.

Figure 1 Main food shopping



Source: NEMS Household Survey May 2013

Herford and Bishop's Stortford have a high market share of main food shopping trips within the town and the rural catchment area (zones 1, 3a and 3b). Buntingford and Sawbridgeworth have a relatively low market share within their respective zones.

Mode of Travel for Main Food Shopping

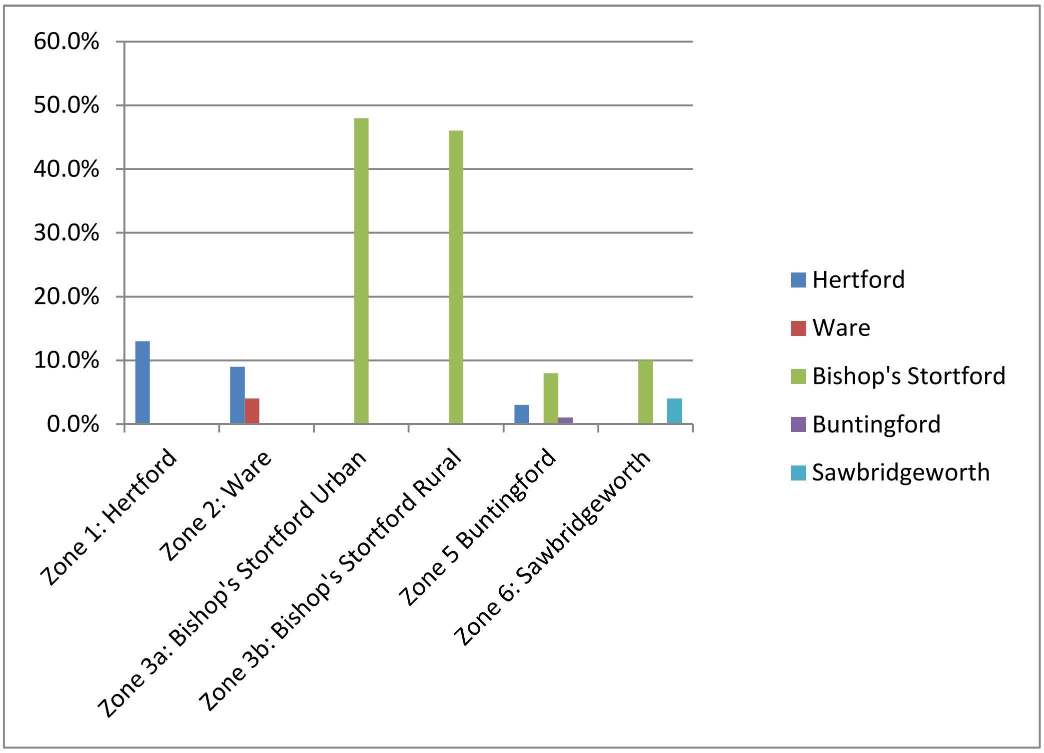
In the whole study area, 85.7% of respondents indicated that they travel to do their main food shopping by car (both driver and passenger) which is higher than the NLP average derived from similar surveys across the country (74.6%). A lower proportion walk to their main food shopping destination (8.0%) compared to the NLP average of 11.7%, and again a lower proportion of households travel by bus (3.4%) compared to the NLP averages derived from other surveys of 8.6%.

Top-Up Food Shopping

Top-up food shopping trips are normally made to supplement main food shopping trips and are undertaken on a more frequent basis for staples such as bread and milk. Around 80% of households across the catchment area indicated that they undertake small-scale or top-up shopping trips in addition to their main food shopping trips. The market share of top-up food shopping for each town is shown in the graph below.

Hertford, Ware, Buntingford and Sawbridgeworth attract more top-up shopping trips, but large food stores in Bishop's Stortford remain the dominant destinations.

Figure 2 Top up food shopping



Source: NEMS Household Survey May 2013

Farmers' Market

20.4% of all respondents regularly use farmers' markets. This includes 35.2% of respondents from the Sawbridgeworth zone and 28.1% of respondents from the Hertford zone. Only 8.7% of respondents in the Buntingford zone regularly use farmers' markets.

For those that regularly use farmers' markets, the most popular market across all zones was the farmers' market at Hertford (38.7%), followed by that at Sawbridgeworth (25.5%). 96.6% of those within the Hertford Zone, who visit farmers' markets, go to the Hertford Market, and 81.8% from the Sawbridgeworth zone go the Sawbridgeworth market. Just under 10% of respondents who visit farmers' markets visit the market at Little Hadham.

When asked what would make respondents visit farmers' markets more often, 52.4% replied "nothing". 7.7% said better advertising would make them visit more regularly, and 7.5% said they would visit if the markets were closer to home. 7.6% responded that lower prices would make them visit the markets more often and 4.6% responded having better quality produce and stalls would increase their trips to farmers' markets. 5.4% responded that they may visit more often if they were held more frequently.

Non-Food Shopping

Respondents were asked in which location they buy most of their household's non-food shopping. For the study area as a whole, Bishop's Stortford was the most popular destination with 27.8% of all respondents shopping there, followed by Harlow (18.2%), Stevenage (9%), Welwyn Garden City (8.6%) and Hertford (7.4%). This demonstrates that the majority of non food shopping is carried out outside the District.

Overall 5% of respondents buy most of their non-food shopping on the internet or have it delivered. The Sawbridgeworth zone has the highest proportion of respondents who buy most of their non-food shopping on the internet/by mail order (6.4%), followed by the Buntingford zone (5.6%). The Ware zone undertakes the lowest proportion of non-food shopping on the internet/by mail order (3.6%).

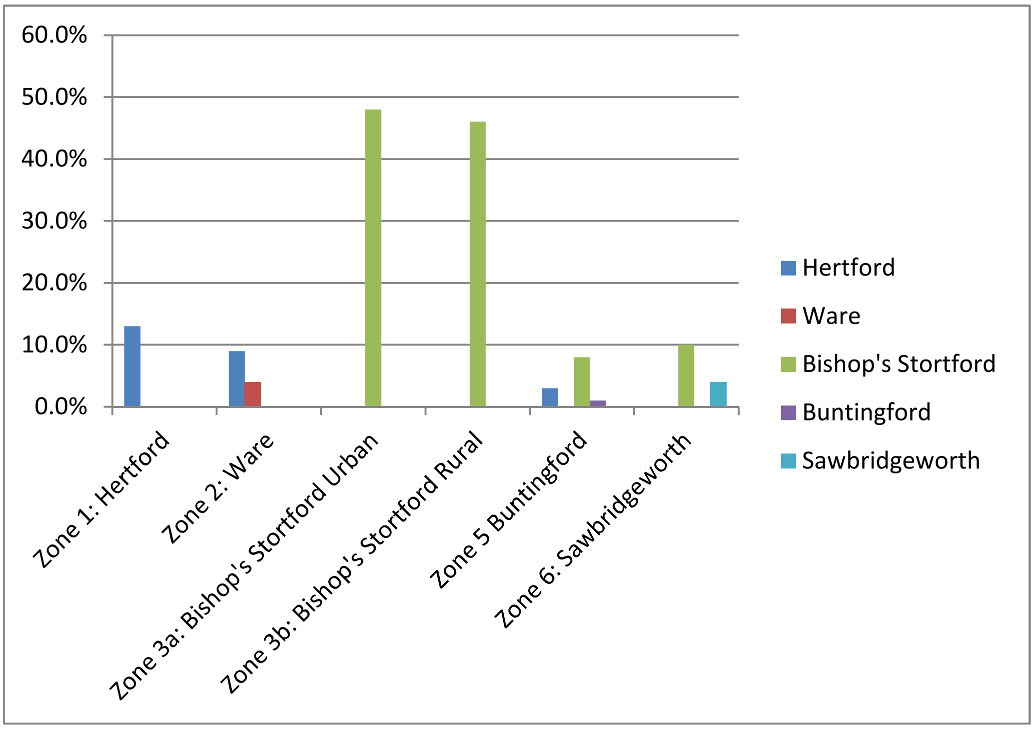
Mode of Travel for Non-Food Shopping

The predominant mode of travel for non-food shopping was the car (both driver and passenger) with 81.3% of respondents indicating that they use this form of travel. The second most popular mode of transport for travelling to non-food shopping destinations was by bus/coach (7.7%) followed by walking (5.2%).

Non-Food Shopping Destinations

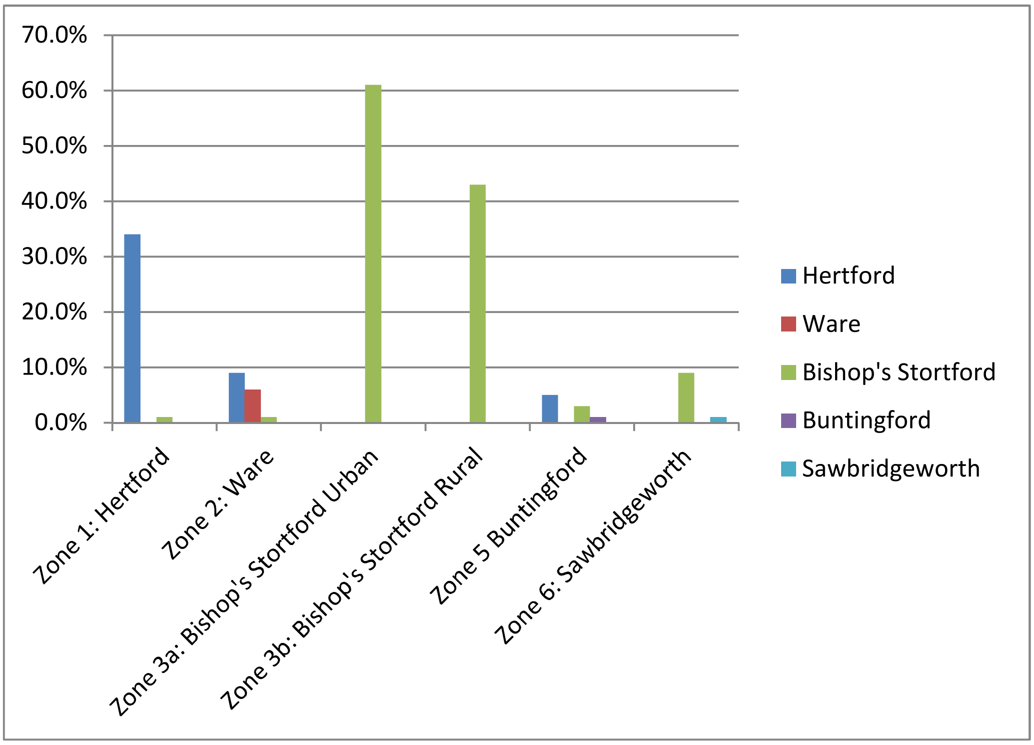
The household survey asked specific questions to probe which destinations respondents last visited to undertake particular types of non-food shopping. The market share for each non food goods category within each town in East Herts is shown in the graphs below.

Figure 3 Clothing and Shoes



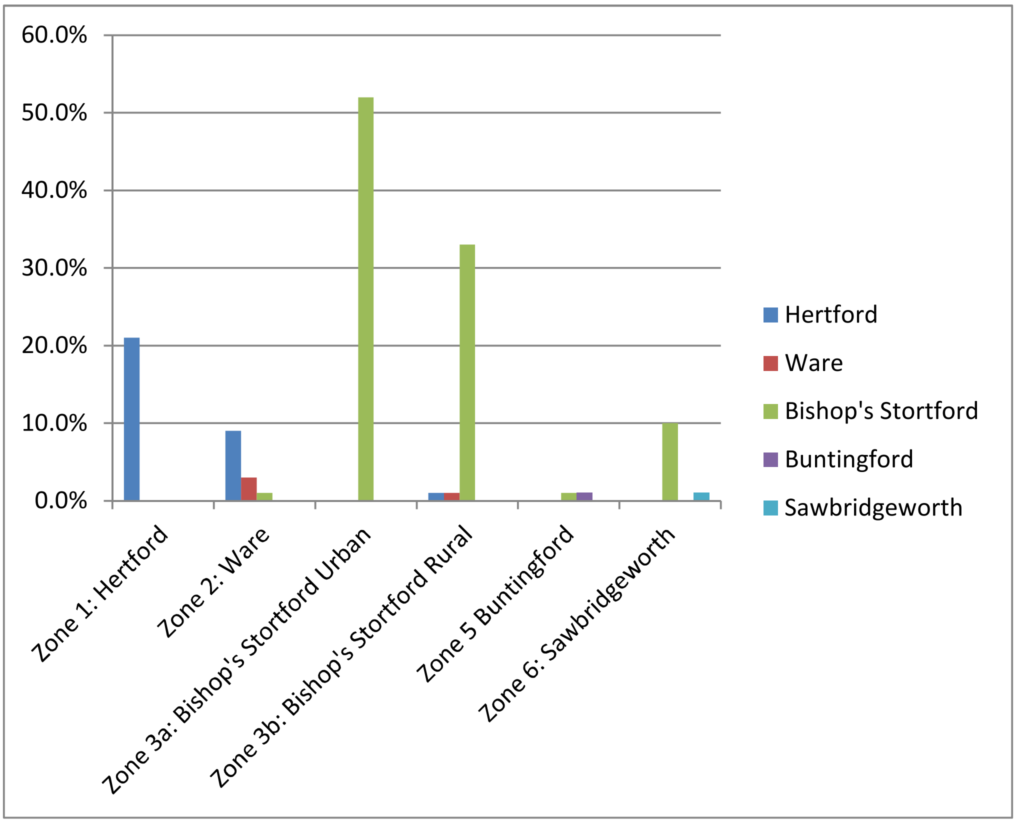
Source: NMES Household Survey May 2013

Figure. 4 Domestic Electrical Appliances



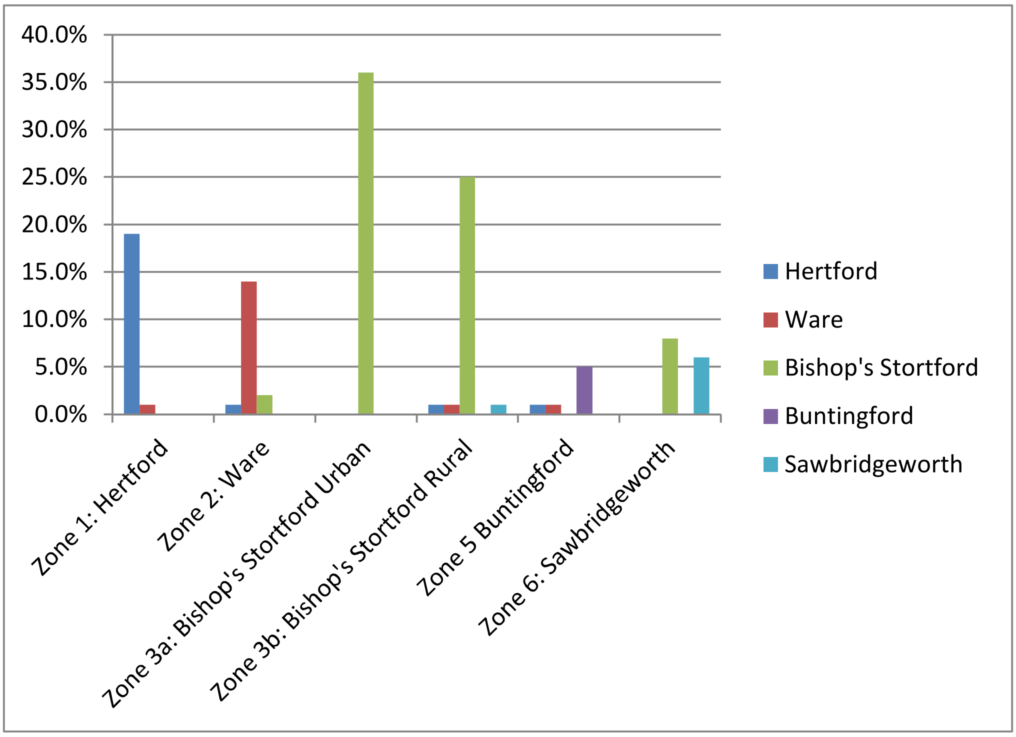
Source: NEMS Household Survey June 2012

Figure.5 Other Electrical Goods



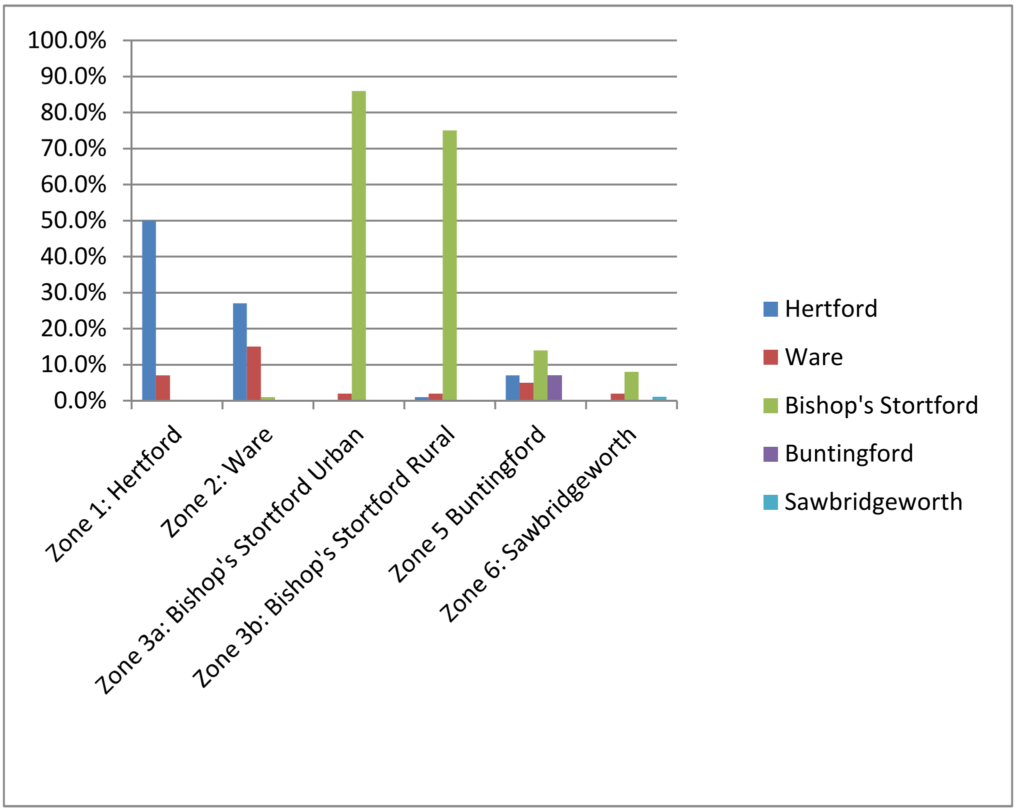
Source: NEMS Household Survey June 2012

Figure 6 Furniture, Soft Furnishings and Floor Coverings



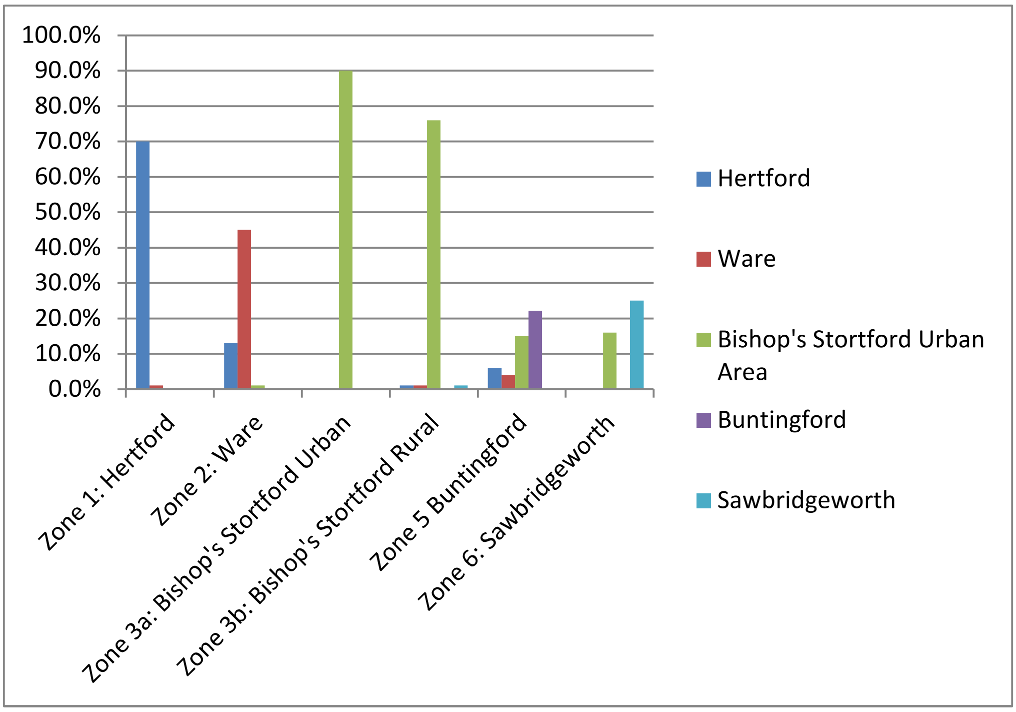
Source: NEMS Household Survey, June 2012

Figure. 6 DIY, Hardware and Garden Items



Source: NEMS Household Survey, June 2012

Figure 7 Health, Beauty and Chemist



Source: NEMS Household Survey, June 2012

Internet Shopping

Respondents were asked what goods they regularly buy on the internet. Over 34% stated that they did not regularly buy items on the internet. The most popular response was “other” goods including books, CDs and toys (46.9%), followed by clothing and shoes (22.5%) and electrical goods including TV, Hi-Fi and computers (13.4%). Groceries were only 6.5%.

Leisure Activities

Cinema

Respondents were asked which cinema they or their family last visited. 77% of respondents indicated that they visit the cinema, which was the second most popular leisure activity after restaurants. This is higher than NLP’s average derived from similar surveys across the Country (51.0%). Of those respondents that visited the cinema, across the study area as a whole, the most popular destination was Empire, Bishop’s Stortford (24.1%) followed by the Cineworld, Stevenage (16.1%) and UCI, Harlow (10.1%).

Theatre

74.3% of respondents indicated that they visited theatres, and this is the third most popular leisure activity. This figure is higher than NLP’s average for other surveys of 42.5% and this high level of participation is likely to be due to the number of facilities in close proximity to London. When asked where they had last visited the theatre, Central London Theatres was the most popular response (44.9%). Other responses included Hertford (9.2%), Bishop’s Stortford (4.3%) and Harlow (3.8%).

Pubs/Bars

The household survey asked respondents if and where they or their family last visited a pub/bar and 74.2% of respondents indicated that they visited pubs/bars. This is higher than the NLP average from other surveys (47.5%) Overall, Bishop’s Stortford (14.8%), Hertford (11.7%), Ware (7.1%) and Sawbridgeworth4.6 %) were the most popular destinations. However, most people generally tended to visit pubs and bars according with the closest main centre within each zone. For example, out of the 14.8% of people who visited a pub/bar in Bishop’s Stortford, 95% came from the Bishop’s Stortford zones (zones 3a and 3b).

Restaurants

Overall 90% of respondents indicated they visit restaurants which is the most popular leisure activity, and this is higher than the NLP average for other surveys (67.9%). Of all the respondents who visited restaurants, Bishop’s Stortford attracted the highest proportion of respondents (21.7%) followed by Hertford (19.9%) and Ware (8.4%).

Nightclubs

Only 9% of respondents indicated that they had visited nightclubs, which makes it the second least popular leisure activity. This participation rate is slightly lower than figure derived by NLP average from other similar surveys of 9.9%. The main location for respondents who last visited nightclubs in the study area as a whole is Central London (34%), followed by Bishop's Stortford (28.4%), however, the sample of nightclub visitors within each zone is relatively small.

Bingo

Bingo facilities were visited by just 5.1% of respondents and this is the least popular leisure activity. This figure is in line with the NLP average participation rate of 5.1% as derived from other similar surveys. The sample of bingo visitors within each zone is again relatively small. The Mecca Bingo Hall in Harlow (47.1%) was the most popular place respondents went to play bingo followed by the Mecca Bingo, Stevenage (25.5%).

Health and Fitness Clubs

33.4% of respondents indicated their household visited health clubs/gyms, which is higher than the NLP average for other surveys (25.6%). The main health club and gym destinations for respondents were facilities in Hertford (24.8%), Bishop's Stortford (20%), Ware (12.5), and Sawbridgeworth (7.2%).

Tenpin Bowling

Overall 32.2% of respondents indicated their household visit tenpin bowling facilities, which is higher than the NLP average for other surveys (18.1%). The main destinations for tenpin bowling are Hollywood Bowl, Stevenage (46.4%) and First Bowl, Bishop's Stortford (35.9%).

Art Galleries/Museums

Art Galleries/Museums were visited by 62.8% of respondents. The main attractions which people last chose to visit were facilities in London (44.9%), Hertford Museum (3.7%) and Cambridge (2.8%).

Appendix 6 Harlow North Growth Location

Methodology

The methodology set out below identifies the key assumptions made in calculating the potential retail floorspace requirements for the proposed residential development at Harlow North.

We have adopted a staged approach, as follows:

1. identify the amount of expenditure currently available to shopping facilities within the catchment area, based on population and average expenditure per capita information;
2. project available expenditure into the future, taking into account population change, growth in average expenditure per capita and forecast changes in shopping patterns;
3. estimate the proportion of available expenditure that will be retained in the catchment area that will be available to support retail floorspace in the residential development;
4. convert available surplus expenditure into potential new floorspace based on assumed average sales densities for new floorspace. This also seeks to provide an appropriate balance and mix of different types of retail floorspace in order to meet any qualitative deficiencies in existing provision.

Population

Given that we are assessing the requirements of the Harlow North development in isolation, for the purposes of this assessment, we have assumed that the catchment area will comprise only the new residential development.

We have assumed that development will be completed between 2016 and 2031, in line with the Local Plan period, and we have adopted the UK average household size for the proposed new development. This gives a total population in 2031 of 24,000. Study area population is amended in Table A6.2, assuming phased development commencing after 2016 to 2031.

Table A6.1: Proposed Population

Additional Population, 2031	
Dwellings	10,000
Population	24,000

Note: UK average household size of 2.4 applied

Table A6.2: Amended Study Area Population Projections

Total Population	2011	2013	2016	2021	2026	2031
Zone 1 - Hertford	35,329	35,932	37,019	37,370	37,875	38,498
Zone 2 - Ware	29,744	30,238	31,141	31,427	31,846	32,364
Zone 3A - Bishop's Stortford Urban	25,687	26,125	26,920	27,186	27,564	28,028
Zone 3B - Bishop's Stortford Rural	40,034	40,921	42,415	43,157	44,029	45,051
Zone 4 - Buntingford	22,455	22,829	23,511	23,728	24,043	24,433
Zone 5 - Sawbridgeworth	21,875	22,260	22,914	23,059	23,276	23,563
Harlow North	n/a	n/a	n/a	8,000	16,000	24,000
Total	**175,124**	**178,306**	**183,921**	**193,927**	**204,634**	**215,938**

Available Expenditure

The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for convenience and comparison goods for the catchment area have been obtained.

As set out in Appendix 1, Experian's latest national expenditure projections have been used to forecast expenditure growth between 2011 and 2031.

Convenience Goods Expenditure

Table A6.3 identifies the available convenience goods expenditure per person, based on national averages.

Table A6.3: Available convenience goods expenditure per person

Expenditure per capita, 2031 (£)	
Convenience Goods	£2,065

Source: Experian 2011 (UK Average adopted)

Table A6.4 below identifies the total available convenience goods expenditure generated by the proposed population.

Table A6.4: Total available convenience goods expenditure

Total Expenditure, 2031 (£m)	
Convenience Goods	£49.56

Main and Top-up Convenience Goods Expenditure Split

We have applied a main to top-up split of 75% to 24% to the available convenience goods expenditure. Table A6.5 below summarises the amount of main and top-up expenditure available to the new population.

Table A6.5: Main and top-up convenience goods expenditure

Main and Top-Up Expenditure, 2031 (£m)	
Main	£37.17
Top-Up	£12.39
Total	**£49.56**

Comparison Goods Expenditure

Table A6.6 identifies the available comparison goods expenditure per person, based on national averages.

Table A6.6: Available comparison goods expenditure per person

Expenditure per capita, 2031 (£)	
Comparison Goods	£4,093

Table A6.7 below identifies the total available comparison goods expenditure generated by the proposed population.

Table A6.7: Total available comparison goods expenditure

Total Expenditure, 2031 (£m)	
Comparison Goods	£98.23

Convenience Goods Spending Retention

It is important to note that not all of the convenience goods expenditure will be available to support retail facilities in the proposed new housing development, as expenditure will continue to be attracted to other centres and existing superstores.

In order to inform our assumptions in relation to the level of expenditure the Harlow North development could retain, we have reviewed the results of the household survey (NEMS, May 2013), particularly in relation to Zone 5, which includes the proposed development site. We have also reviewed urban expansion/new settlement schemes to compare the level of retail provision with the proposed Harlow North development (included at the end of this Appendix). While none of these examples is directly comparable, they provide a useful point of reference. In terms of assessment of convenience goods expenditure retention, we note the following:

- **Buckshaw Village New Town, Chorley** (estimated population: 10,000) – assumes 75% of convenience expenditure retained in the primary catchment area and 20% from secondary catchment area;
- **Whitehill Bordon Eco Town, Hampshire** (estimated population: 9,400) – assumes 48% of convenience expenditure retained in its ‘home’ zone.

Informed by analysis of the studies noted above, and applying our judgement to the Harlow, we have assessed the potential expenditure retention and floorspace provision within the development. In estimating the floorspace requirement generated by the population of Harlow North in isolation, this provides an estimate of the minimum retail floorspace requirements to meet the needs of the new population.

Table A6.8 below estimates the proportion of main and top-up convenience goods expenditure that we believe could be retained to support the proposed retail floorspace.

Table A6.8: Retained convenience goods expenditure

Convenience Goods Retention (%)	
Main	20%
Top-Up	50%

These estimated retention figures reflects the fact that top-up convenience shopping in particular can be carried out locally where appropriate facilities are provided. Revised shopping patterns assuming these retention rates are shown in Table A6.9.

Table A6.9: Revised Convenience Goods Market Shares – with Harlow North

Centre/Facility	Zone 1 Hertford	Zone 2 Ware	Zone 3A Bishop's Stortford Urban	Zone 3B Bishop's Stortford Rural	Zone 4 Buntingford	Zone 5 Sawbridgeworth	Harlow North	% Inflow
Hertford	66.1%	11.7%	0.0%	0.4%	4.3%	0.4%	0.0%	10.0%
Ware	1.0%	60.0%	0.0%	0.0%	5.0%	0.3%	0.0%	10.0%
Bishop's Stortford	0.8%	0.8%	86.6%	72.0%	14.9%	15.5%	4.0%	10.0%
Buntingford	0.0%	0.3%	0.0%	0.2%	17.7%	0.0%	0.0%	10.0%
Sawbridgeworth	0.0%	0.0%	0.0%	0.0%	0.0%	16.6%	3.5%	10.0%
Harlow North Centres	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	27.5%	10.0%
Other East Herts	8.0%	6.8%	10.7%	12.2%	8.1%	4.7%	0.0%	5.0%
East Herts Total	**75.9%**	**79.6%**	**97.3%**	**84.8%**	**50.0%**	**37.5%**	**35.0%**	
Harlow	0.4%	5.5%	1.4%	5.4%	0.9%	61.1%	65.0%	n/a
Stevenage	5.5%	1.7%	0.0%	0.4%	30.9%	0.0%	0.0%	n/a
Hoddesdon	2.9%	5.2%	0.0%	0.2%	0.6%	0.3%	0.0%	n/a
Welwyn Garden City	8.0%	3.0%	0.3%	0.0%	0.0%	0.0%	0.0%	n/a
Brookfield Centre	2.7%	4.0%	0.5%	0.0%	0.6%	0.0%	0.0%	n/a
Other Outside East Herts	4.6%	1.0%	0.5%	9.2%	17.0%	1.1%	0.0%	n/a
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Comparison Goods Spending Retention

For comparison goods, we have assumed that a much lower proportion of available expenditure will be retained. This recognises that while the scale of any centres proposed within the residential development are such as to justify an element of comparison shopping, consistent with the role of the centres, they would not offer the full range of higher order comparison shopping provided by centres at the upper end of the retail hierarchy. The estimated retention rates also take account of the offer of existing centres and settlements in the area, in particular Harlow and Sawbridgeworth. The levels of expenditure retention emphasises that the proposed comparison goods offer will be complementary to the existing offer within Harlow and other centres in the surrounding area, and a substantial amount of comparison spending will be created to support these centres.

Household survey data is less useful in seeking to establish comparison shopping patterns for smaller centres as the results tend to favour higher order centres as the last/other destinations for most categories of comparison goods. Table A6.10 below identifies the split between spending per person on categories of comparison goods, which has been obtained from Experian for the UK average. The highlighted categories are those which are more likely to be represented in a district or local centre. We would expect higher order categories, such as clothing and electrical goods to be very limited in a district or local centre, as residents would travel to larger centres to meet these comparison shopping requirements.

Table A6.10: Split of Comparison Goods Expenditure by goods category per person

Goods Category	%
Clothing materials and garments	23.76%
Games, toys and hobbies; sport and camping; musical instruments	10.91%
Appliances for personal care	**9.08%**
Audio-visual, photographic and information processing equipment	8.83%
Furniture and furnishings; carpets and other floor coverings	8.06%
Shoes and other footwear	3.80%
Books and stationery	**3.27%**
Jewellery, clocks and watches	4.15%
Materials for maintenance and repair of the dwelling	**3.13%**
Household textiles	3.63%
Medical goods and other pharmaceutical products	**2.60%**
Major household appliances (electric or not)	2.64%
Recording media	2.96%
Glassware, tableware and household utensils	**2.36%**
Other personal effects	1.90%
Gardens, plants and flowers	**1.69%**
Small tools and miscellaneous accessories	**1.65%**
Pets and related products	**1.65%**
Therapeutic appliances and equipment	2.04%
Bicycles	0.81%
Small electrical household appliances	**0.49%**
Major tools and equipment	0.35%
Non-Durable household goods	**0.21%**
Total Comparison Goods Expenditure	**100.00%**

The highlighted goods in Table A6.10 that may typically be found in a district or local centre account for a total of around 26% of available comparison goods expenditure per person. Clearly, we would not expect all of these goods categories to be represented in district or local centres, nor would we expect that anything other than a small proportion of the spending on any categories that are present within a local centre would be spent in that centre. We have assumed shopping centres within Harlow North could retain up to 10% of comparison goods expenditure. Revised shopping patterns assuming this retention rate are shown in Table A6.11.

Table A6.11: Revised Comparison Goods Market Shares – With Harlow North

Centre/Facility	Zone 1 Hertford	Zone 2 Ware	Zone 3A Bishop's Stortford Urban	Zone 3B Bishop's Stortford Rural	Zone 4 Buntingford	Zone 5 Sawbridgeworth	Harlow North	% Inflow
Hertford	22.6%	8.9%	0.0%	0.3%	1.6%	0.0%	0.0%	10.0%
Madford Retail Park, Hertford	1.9%	1.2%	0.0%	0.1%	0.1%	0.0%	0.0%	10.0%
Ware	1.2%	13.5%	0.1%	0.7%	1.4%	0.6%	0.0%	10.0%
Bishop's Stortford	0.1%	1.6%	60.0%	47.0%	10.0%	18.4%	10.0%	10.0%
Buntingford	0.0%	0.0%	0.0%	0.0%	4.0%	0.0%	0.0%	10.0%
Sawbridgeworth	0.0%	0.0%	0.0%	0.2%	0.2%	3.2%	1.0%	10.0%
Stanstead Abbotts	0.0%	0.1%	0.1%	0.2%	0.0%	0.0%	0.0%	5.0%
Stansted Mountfitchet	0.0%	0.0%	0.2%	0.9%	0.1%	0.2%	0.0%	5.0%
Harlow North	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.0%	5.0%
Other East Herts	0.1%	0.2%	0.2%	0.3%	0.4%	0.1%	0.0%	5.0%
East Herts Total	**25.9%**	**25.5%**	**60.6%**	**49.7%**	**17.8%**	**22.5%**	**21.0%**	
Harlow (incl. Retail Parks)	8.4%	30.5%	16.8%	24.9%	5.2%	51.2%	50.0%	n/a
Stevenage (incl. Retail Parks)	16.4%	9.4%	0.4%	0.7%	35.8%	0.0%	0.0%	n/a
Hoddesdon	1.4%	2.4%	0.0%	0.1%	0.0%	0.0%	0.0%	n/a
Welwyn Garden City	22.7%	12.0%	1.4%	2.4%	9.7%	3.5%	5.0%	n/a
Brookfield Centre	5.5%	8.8%	0.8%	1.3%	3.5%	2.8%	4.0%	n/a
Other Outside East Herts	19.7%	11.4%	20.0%	20.9%	28.0%	20.0%	20.0%	n/a
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Revised Retail Floorspace Projections

The revised convenience goods floorspace projections with development at Harlow North are shown in Table A6.12.

The revised comparison goods floorspace projections with development at Harlow North are shown in Table A6.13.

Table A6.12: Revised Convenience Goods Floorspace Projections – With Harlow North

Centre	2013	2016	2021	2026	2031
Available Expenditure in District (£m)					
Hertford	65.27	62.14	64.23	67.39	71.03
Ware	27.35	44.69	46.17	48.44	51.06
Bishop's Stortford	127.61	132.20	137.84	145.79	154.93
Buntingford	9.58	9.65	9.96	10.46	11.02
Sawbridgeworth	8.04	8.32	9.17	10.19	11.33
Harlow North	n/a	n/a	4.70	9.73	15.14
Other East Herts	33.65	32.92	34.11	35.85	37.87
Total	**271.49**	**289.92**	**306.18**	**327.85**	**352.40**
Benchmark Turnover of Existing Facilities (£m)					
Hertford	69.15	75.69	75.69	75.69	75.69
Ware	25.41	50.23	50.23	50.23	50.23
Bishop's Stortford	124.04	135.82	135.82	135.82	135.82
Buntingford	10.29	10.29	10.29	10.29	10.29
Sawbridgeworth	4.31	4.31	4.31	4.31	4.31
Harlow North	n/a	n/a	0.00	0.00	0.00
Other East Herts	33.65	33.65	33.65	33.65	33.65
Total	**266.84**	**309.98**	**309.98**	**309.98**	**309.98**
Surplus/Deficit Expenditure (£m)					
Hertford*	-3.88	-13.55	-11.46	-8.30	-4.66
Ware*	1.94	-5.54	-4.06	-1.79	0.83
Bishop's Stortford*	3.58	-3.62	2.03	9.97	19.12
Buntingford	-0.72	-0.65	-0.33	0.16	0.73
Sawbridgeworth	3.73	4.01	4.86	5.89	7.03
Harlow North	n/a	n/a	4.70	9.73	15.14
Other East Herts	0.00	-0.72	0.46	2.21	4.23
Total	**4.65**	**-20.07**	**-3.80**	**17.87**	**42.42**
Turnover Density New Floorspace (£ per sq.m)					
Large food stores	£13,000	£13,000	£13,000	£13,000	£13,000
Local shops	£5,000	£5,000	£5,000	£5,000	£5,000
Floorspace Requirement (sq.m net)					
Hertford	-298	-1,042	-882	-639	-358
Ware	149	-426	-312	-137	64
Bishop's Stortford	275	-279	156	767	1,470
Buntingford	-143	-130	-66	33	146
Sawbridgeworth	746	802	973	1,178	1,405
Harlow North	n/a	n/a	940	1,946	3,029
Other East Herts	0	-144	92	441	846
Total	**728**	**-1,218**	**900**	**3,589**	**6,602**
Floorspace Requirement (sq.m gross)					
Hertford	-426	-1,489	-1,260	-912	-512
Ware	213	-609	-446	-196	91
Bishop's Stortford	393	-398	223	1,096	2,101
Buntingford	-205	-185	-94	47	209
Sawbridgeworth	1,066	1,146	1,389	1,682	2,008
Harlow North	n/a	n/a	1,343	2,780	4,327
Other East Herts	0	-206	131	631	1,208
Total	**1,040**	**-1,741**	**1,286**	**5,127**	**9,431**

Table A6.13: Revised Comparison Goods Floorspace Projections – With Harlow North

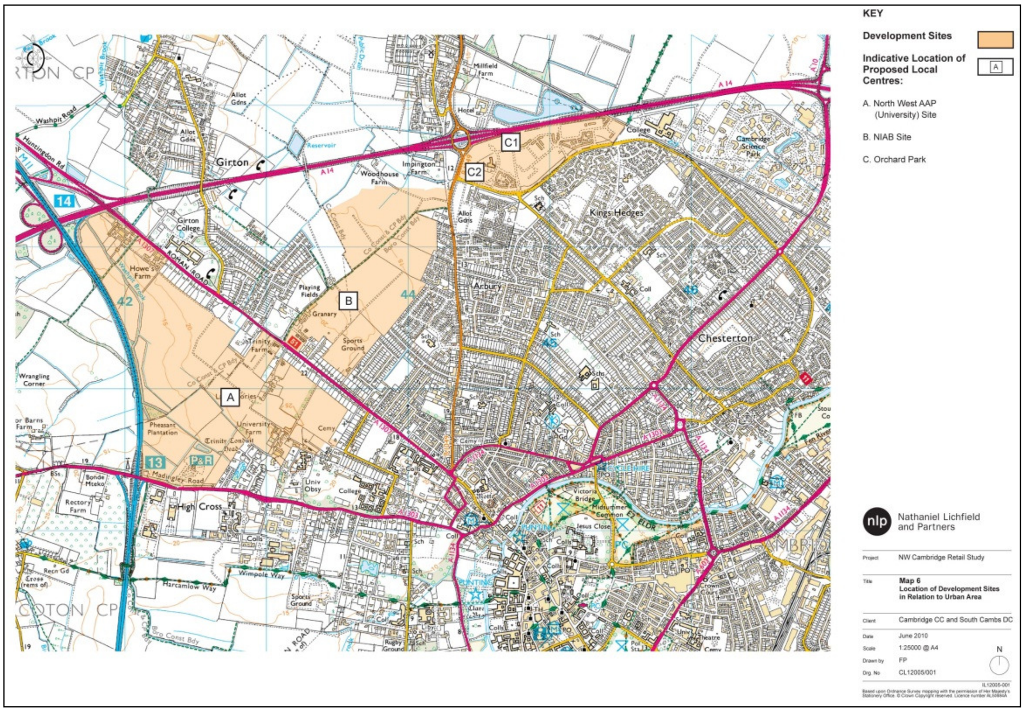
Centre	2013	2016	2021	2026	2031
Available Expenditure in District (£m)					
Hertford	43.49	46.36	52.19	60.88	71.31
Ware	15.79	20.21	22.76	26.55	31.10
Bishop's Stortford	130.29	160.66	184.26	218.67	260.36
Buntingford	3.46	3.68	4.14	4.83	5.66
Sawbridgeworth	2.95	3.13	3.79	4.72	5.87
Harlow North	n/a	n/a	2.60	5.98	10.34
Other East Herts	3.42	3.74	4.23	4.96	5.82
Total	**199.41**	**237.79**	**273.98**	**326.59**	**390.46**
Benchmark Turnover of Existing Facilities (£m)					
Hertford	43.49	45.89	50.17	54.85	59.96
Ware	15.79	23.39	25.57	27.96	30.56
Bishop's Stortford	130.29	206.74	226.03	247.11	270.17
Buntingford	3.46	3.65	3.99	4.37	4.77
Sawbridgeworth	2.95	3.11	3.40	3.72	4.07
Harlow North	n/a	n/a	0.00	0.00	0.00
Other East Herts	3.42	3.61	3.95	4.32	4.72
Total	**199.41**	**286.39**	**313.11**	**342.32**	**374.26**
Surplus/Defecit Expenditure (£m)					
Hertford	n/a	0.47	2.02	6.03	11.34
Ware	n/a	-3.18	-2.81	-1.41	0.53
Bishop's Stortford	n/a	-46.08	-41.76	-28.44	-9.81
Buntingford	n/a	0.03	0.15	0.46	0.88
Sawbridgeworth	n/a	0.02	0.39	1.01	1.81
Harlow North	n/a	n/a	2.60	5.98	10.34
Other East Herts	n/a	0.13	0.28	0.64	1.10
Total	**n/a**	**-48.60**	**-39.13**	**-15.73**	**16.21**
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,275	£5,767	£6,305	£6,893
Floorspace Requirement (sq.m net)					
Hertford	n/a	90	351	956	1,646
Ware	n/a	-602	-488	-223	78
Bishop's Stortford	n/a	-8,735	-7,242	-4,511	-1,423
Buntingford	n/a	5	26	74	128
Sawbridgeworth	n/a	4	68	160	262
Harlow North	n/a	n/a	451	949	1,500
Other East Herts	n/a	25	49	101	160
Total	**n/a**	**-9,214**	**-6,785**	**-2,495**	**2,351**
Floorspace Requirement (sq.m gross)					
Hertford	n/a	120	468	1,275	2,194
Ware	n/a	-803	-650	-298	103
Bishop's Stortford	n/a	-11,647	-9,656	-6,015	-1,897
Buntingford	n/a	7	34	98	171
Sawbridgeworth	n/a	5	91	213	350
Harlow North	n/a	n/a	601	1,265	2,000
Other East Herts	n/a	33	66	135	214
Total	**n/a**	**-12,285**	**-9,047**	**-3,327**	**3,134**

Comparable Urban Expansion/New Settlement Schemes

North West Cambridge Urban Expansion

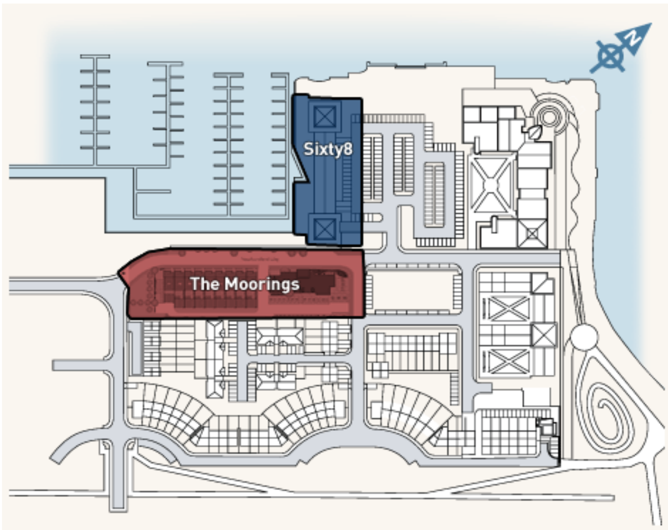
The North West Cambridge Supplementary Retail Study (NLP, 2010) provided a detailed retail planning evidence base for future expansion in north-west Cambridge. The study identified retail capacity for two to three new local centres up to 2021. The sites in question, known as the University site, NIAB and Orchard Park, are all subject to recent development proposals and planning applications.

A planning application for the University site submitted in September 2011 proposed new homes, student accommodation, education uses, conference centre and up to 5,300 sq.m. gross retail floorspace (Use Classes A1 to A5) (including a 2,000 sq.m. supermarket). The NIAB site has also been subject to applications for housing development and the inclusion of a local centre. The Orchard Park scheme secured outline permission for 900 new home in 2005, further applications have secured other parcels of land for housing development and also a local centre incorporating 807 sq.m net convenience floorspace.



Port Marine, Portishead

Part of the award winning Port Marina development (approx. 3,400 new homes) at Portishead harbour side. This includes a Waitrose (2,500 sq.m net with 250 space car park) and a number of other small commercial and retail units, opposite a new leisure centre. Other uses may follow on adjoining sites.



Cambourne, Cambridgeshire

Part of the new community developed at Cambourne, approximately nine miles from Cambridge, comprising 3,300 new homes and a 50,000sq.m Business Park. 'Supermarket anchored' by a Morrison's (3,000 sq.m net and 500 car parking spaces) and there is an adjoining High Street with a number of retail units.

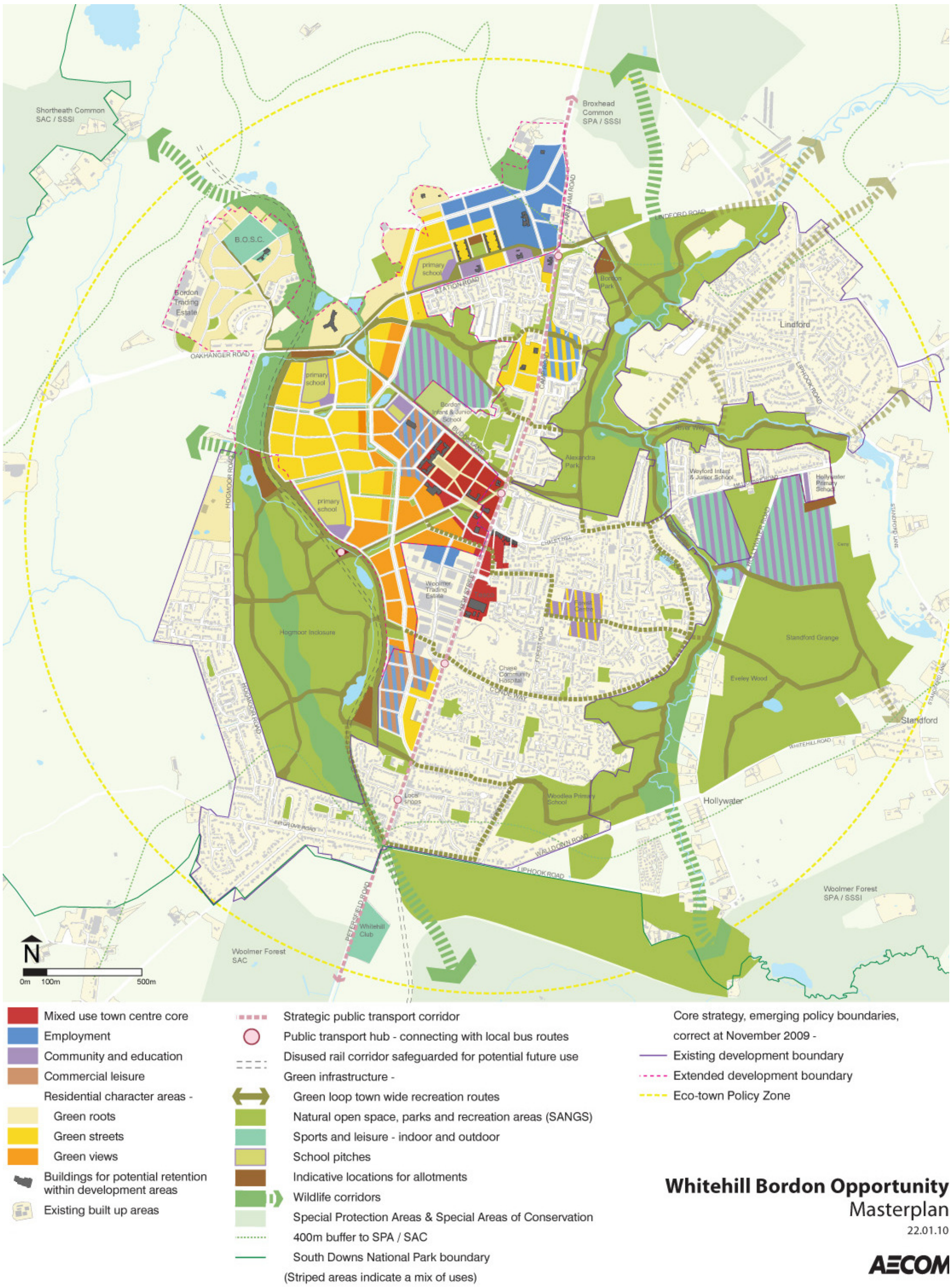
Community uses include health centre/library (co-located), police station, fire station, church, community hall and nursery. The high street includes three take away outlets, several estate agents, a bookmaker, a Building Society branch, a dry cleaner, a bicycle shop, a coffee shop, restaurant and a Pharmacy with a Post Office counter. There is also now a pub and space for six further retail units.

Buckshaw Village New Town, Chorley

This new settlement has been under construction since the mid-2000s, with permissions totalling 4,120 new homes as well as large scale industrial floorspace. A proposed local centre to serve the estimated future population (approximately 10,000) includes retail capacity for 3,250 sq.m gross floorspace, assuming 75% retention rates for food shopping within the village and 20% from the remainder of the catchment area (Retail Statement, Steven Abbot Associates. 2008). For non-food floorspace, it is assumed that 15% of expenditure will be retained by the new population, and 1% in the remainder of the catchment.

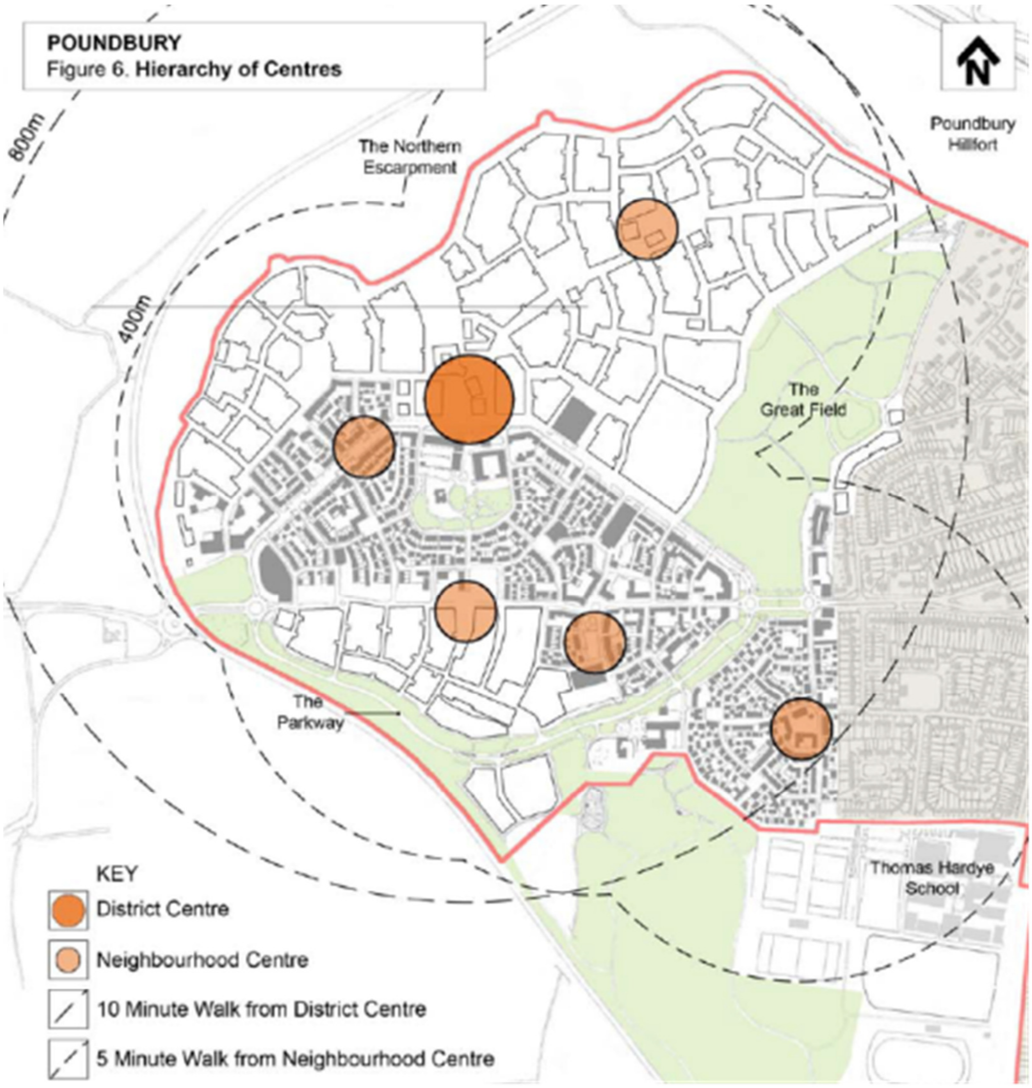
Whitehill Bordon Eco Town, Hampshire

Another designation from the first round of eco towns, the recently updated Whitehill Bordon masterplan includes 4,000 new homes by 2026 (estimated population of 9,413), and identifies retail capacity for an additional 1,269 sq.m net convenience goods floorspace and 13,255 sq.m net comparison goods floorspace. The retail capacity assessment estimates a 48% retention rate for food and 30% for non-food spending (Retail Assessment, NLP, 2011).



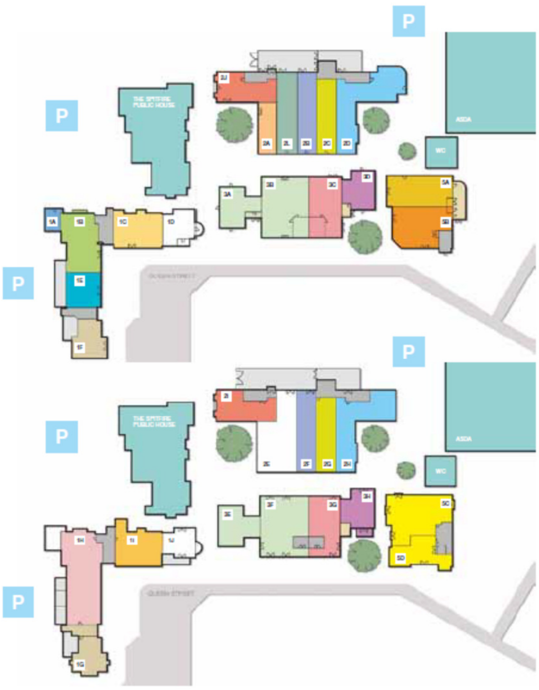
Poundbury Urban Expansion, Dorset

The Duchy of Cornwall's urban extension to the market town of Dorchester is a partially built scheme of 2,200 homes. The masterplan structure designates one district centre and five supporting neighbourhood centres. Phase 1 of the development has been built out and includes a Budgens convenience store (557 sq.m net) together with a range of shops and cafés. This represents one of the neighbourhood centres supporting a small allocation of 250 residential units. The Development Brief notes that the provision of a district centre within Poundbury will allow the concentration of shops, services and facilities intended to meet the needs of the whole of the Poundbury population where they are most accessible. The district centre may include a larger food store to serve the whole development.



King's Hill, Kent

A former airfield near West Malling, King's Hill comprises approx. 2,700 new homes and 80,000 sq.m of business space (including Tonbridge and Malling's offices).The district centre is 'supermarket anchored' by an Asda store which was built in advance (2,387 sq.m net and 450 parking spaces) and is arranged in a conventional format. However, adjoining the Asda is the district centre with 20 units arranged in four two-storey buildings fronting a pedestrian square with mature trees. One of the Asda entrances also fronts on to the square. Various community uses including community hall, school and a clinic are set further back but are within easy walking distance. Many of the residential neighbourhoods are also only a short walk from the district centre.



ASDA Fresh	Neighbourhood supermarket
Costa Coffee	Coffee Shop
Doctors Surgery	Doctors Surgery
Domino's Pizza	Takeaway
Eternal	Home Furnishings & Fashion
Everard Insurance	Marine Insurance
Gufaa Raja	Indian restaurant
IQ Dental & Implant Centre	Dental Clinic
Kardz	Card & Gift shop
Kings Hill Dry Cleaners	Dry cleaners
Kings Hill Opticians	Optician
Kings Hill Pharmacy	Pharmacy
Kings Hill Properties	Estate agent
Kings Hill Shoe Repairs	Shoe Repairs & Key Cutting
Kings Hill Veterinary Clinic	Veterinary clinic
Memphis Belle	Sandwich bar
PostnPacking Warehouse	Postal, Courier & Packaging
Sino	Oriental restaurant
Stone Hairdressing	Hairdressers
Thai Moom	Thai Restaurant
The Spitfire	Shepherd Neame pub
Ward & Partners	Estate agent

Liberty Square District Centre:

- Total Floorspace: 8,850 sq.m

- Total Number of Units: 21

- Total number of Convenience units: 1

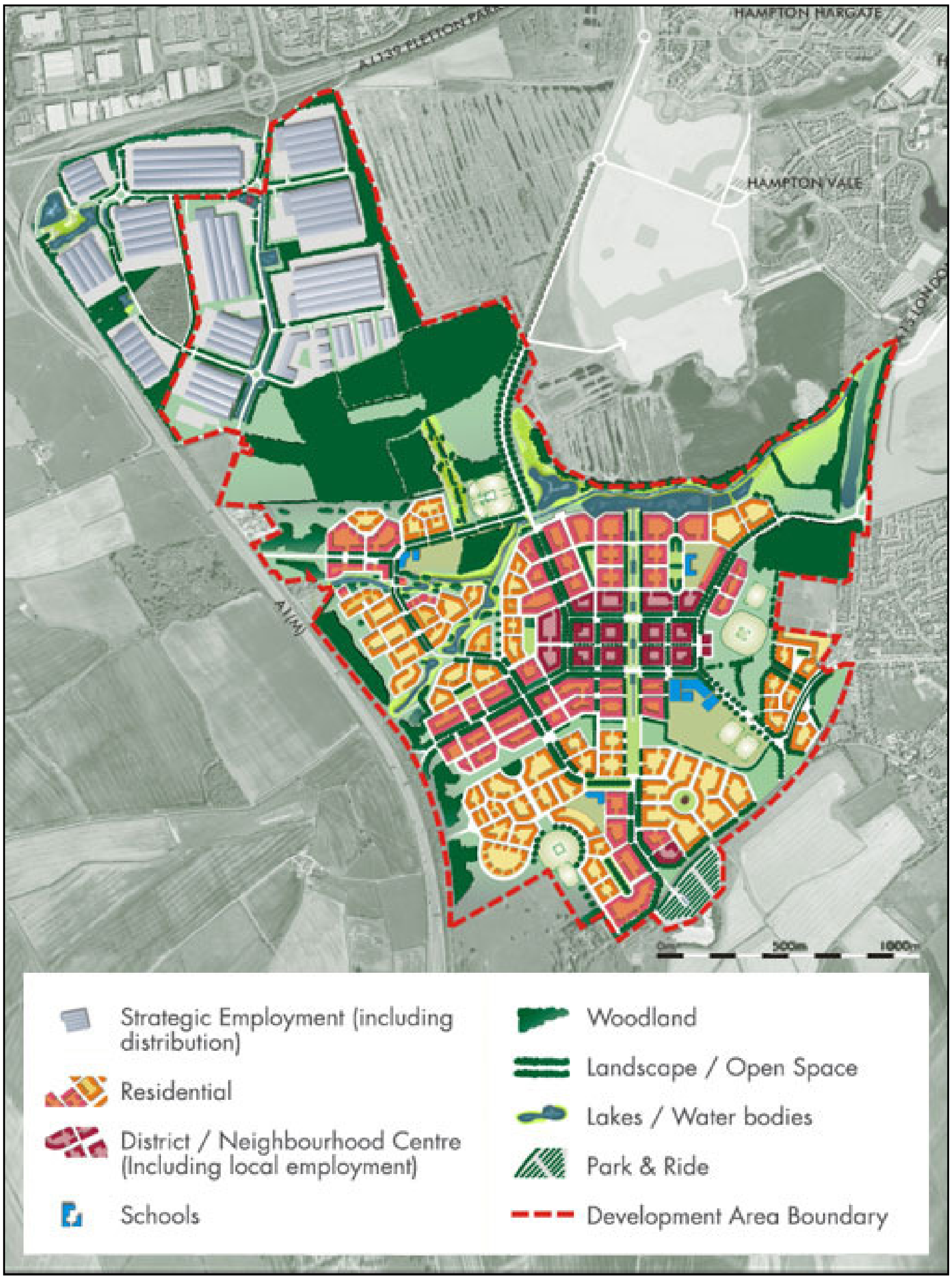
- Other A1-A5 Units: 17

- Total Floorspace of Convenience Units: 5,550 sq.m

- Total Floorspace of A1-A5: 3,300 sq.m

- Other Facilities: Doctors Surgery, Dental Clinic, Vets

Great Haddon Urban Extension, Peterborough



An urban extension scheme of 5,300 dwellings is proposed, containing one district centre and two neighbourhood centres. The retail capacity assessment and planning application assumes that there will be a 4,200 sq.m gross (2,940 sq.m net) food store in the district centre, together with a range of smaller units for shops, services, restaurants, cafés and other A1-A5 uses, together with community facilities and other commercial uses. The two neighbourhood centres will include smaller scale retail facilities, each anchored by a small convenience store of up to 450 sq.m gross, primarily catering for top-up shopping and other local needs (Great Haddon Urban Expansion Area, Retail Impact Assessment, King Sturge 2011).

The report notes that in order to be successful in planning terms, the retail offer in the proposed district centre must have sufficient critical mass and be of an appropriate mix to meet the needs and expectations of the future community. If the retail provision is insufficient and cannot compete with the retail offer elsewhere then it will fail as a vital and viable centre to the detriment of the local community. The intention is therefore to deliver the food store, the key retail element of the district centre, as early as is practical within Great Haddon's development phase in order to meet local needs and establish sustainable patterns of activity. Towards the latter phases of Great Haddon's development process the two neighbourhood centres will be introduced. The table below sets out the proposed floorspace for the centres.

Table A: Proposed Floorspace in Gross Square Metres

Centre	Uses	Proposed Floorspace (square metres gross)			Total
		Convenience A1	Comparison A1	Other** A1 – A5	
District Centre	**Supermarket**, butcher, baker, fishmonger, greengrocer, pet store, clothing store, hardware shop, chemist, electrical shop, bicycle shop, off-licence, newsagent, hairdressers, dry cleaners, hot food takeaway, café, restaurant, pub/bar, estate agents, bank…	3,700 foodstore)* 500†	500 (foodstore)* 1000†	3,500†	4,200 (foodstore)* 5,000 Total 9,200
Neighbourhood Centre x 2	Small convenience food store to meet 'top-up' shopping requirements, off-licence, butcher, chemist, baker, café, hot food takeaway, dry cleaner…	550† each (of which the convenience shop comprise up to 450 each)	100† each	500† each	1,150† each 2,300† total
TOTAL		**5,300†**	**1,700†**	**4,500†**	**11,500**

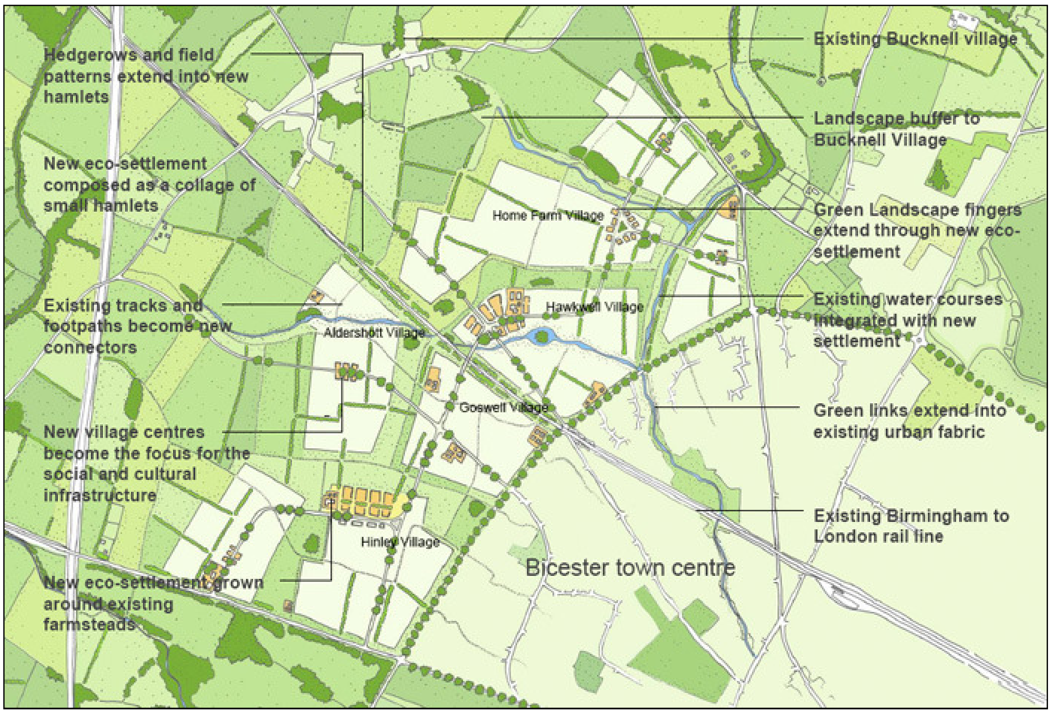
* For foodstores the net retail sales area defined by PPS4 comprises: the sales area within the building (i.e. all internal areas accessible to the customer), but excluding checkouts, lobbies, concessions, restaurants, customer toilets and walkways behind the checkouts.

**Other A1 to A5 constitutes A1 services uses (such as hairdressers and post offices), A2 uses (Financial and Professional Services), A3 (Restaurants and Cafes), A4 (Drinking Establishments), and A5 (Hot Food Takeaways).

† Indicative areas which may be subject to change to reflect local requirements and market conditions at the time of opening.

North West Bicester Urban Expansion, Oxfordshire

One of the first designated eco towns, NW Bicester will be an exemplar sustainable town incorporating 5,000 new homes. Phase 1 of the development has outline permission for 400 new homes, as well as three retail units totalling 770 sq.m, including a convenience store (Cherwell District Council ref 10/01780/HYBRID)



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