BOROUGH OF BROXBOURNE COUNCIL

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Brookfield Retail & Leisure Impact Study

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1.0 Introduction

1.1 Instruction

1.1.1 WYG Planning (hereafter 'WYG') has been commissioned by the Borough of Broxbourne Council ('the Council') to undertake an appraisal of the impact of the planned retail and leisure development at Brookfield. The Study will support the emerging Broxbourne Local Plan 2016-2031.

1.1.2 The Study follows two earlier retail evidence base document undertaken by WYG, namely the July 2015 Borough of Broxbourne Retail & Leisure Study and May 2016 Retail Addendum.

1.1.3 A key purpose of this Study is to provide an impact assessment of the planned retail and leisure development at Brookfield on relevant defined centres within and outside the administrative area of Broxbourne.

1.2 Borough of Broxbourne Retail & Leisure Study

1.2.1 The Retail & Leisure Study and Addendum provide an assessment of retail and leisure needs and capacity within the Borough in the period to 2030. The Study identified a requirement for the Council to plan for additional retail and leisure floorspace in the Borough. The Retail & Leisure Study sought to assess where the identified forecast additional retail and leisure capacity and growth could be located in the future to help inform the Council's future policy direction. The assessment identified:

- With the exception of the site at the northern High Street (Waltham Cross), there were no new opportunities for retail or leisure developments within or on the edge of the town centres; and
- There was very little physical capacity to accommodate all of the assessed convenience and comparison floorspace capacity over the period within the designated centres.

1.2.2 In the absence of suitable town centre locations the NPPF requires that local planning authorities adopt a sequential approach to the consideration of planning application for main town centre uses and the potential for the proposal to be accommodated in a sequentially superior location.

1.2.3 The Retail & Leisure Study concluded that, subject to compliance with an assessment of impact, as a long established retail destination in its own right, Brookfield (and the Greater Brookfield area) was considered the sequentially preferable location to accommodate any residual large scale retail and leisure development within the Borough.

1.3 Planned Brookfield Retail & Leisure Development

1.3.1 The planned retail and leisure floorspace in Brookfield forms parts of the Council's comprehensive Brookfield Riverside proposals. Brookfield Riverside is *"the largest and most prestigious scheme to be proposed for inclusion in the draft Plan[1]"*. The draft Masterplan plans for:

- 1,500 new homes (a mix of low, medium and high density);
- Up to 47,000sq m office and civic floorspace (including Borough Council offices);
- Mixed use 'town centre' development comprising:
  - Up to 35,000sq m net retail floorspace (A1, A3, A4 and A5 Use Class);
  - Up to 10,000sq m of leisure floorspace including a cinema and health and fitness club;
  - Community facilities;
  - Hotel; and
  - Public transport hub.
- Education facilities/schools;
- Elderly persons accommodation;
- Open space, landscaping and allotments (relocated); and
- Road and public utility infrastructure.

A copy of the draft Masterplan is attached at **Appendix A**.

1.3.2 For the avoidance of doubt this impact study only considers the planned retail and leisure elements of the Masterplan. It does not consider the impact of other town centre uses including office and hotel uses.

1.4 Previous Core Strategy Brookfield Retail Impact Assessment

1.4.1 The Council had previously submitted its Core Strategy Development Document Plan to the Secretary of State for examination in public (EiP) in 2010. A retail and leisure evidence base document titled 'Retail and Town Centres: Evidence Base Bridging Report' was undertaken by GVA Grimley (July 2010) on behalf of the Council. The document provided an impact assessment of new retail and leisure development at Brookfield.

1.4.2 Overall, the Core Strategy proposed, *inter alia*, 50,000sq m gross / 35,000sq m net comparison goods floorspace and 15,000sq m gross of leisure floorspace at Brookfield. The Inspector considered that the critical mass and the amount of proposed retail floorspace were not fully justified. He therefore concluded that the strategic allocation for that amount of retail and leisure floorspace was not justified or consistent with government policy.

[1] Broxbourne Local Plan - A Duty to Cooperate Document- October 2015

1.4.3 It should be noted from the outset that the level of retail and leisure floorspace now planned in the emerging Local Plan for Brookfield is lower than that pursued by the Council in the earlier Core Strategy.

1.5 Key Stakeholder Engagement

1.5.1 This study has been subject to engagement with neighbouring authorities and key stakeholders. Engagement has included a round table meeting with neighbouring local authorities and a ‘follow up’ meeting with Harlow Council and their retail planning consultants, GVA Grimley in November 2016.

1.5.2 A summary of the key stakeholder engagement is attached at **Appendix B**. Also attached is a table summarising the key points raised by neighbouring local authorities and the Council’s/WYG response.

1.6 Structure of Report

1.6.1 Our report is structured as follows:

Section 2: summarises the impact test requirements and guidance;

Section 3: details the retail impact methodology and evidence base this study has adopted;

Section 4: provides the quantitative retail impact assessment;

Section 5: considers potential impact on existing, planned and committed investment in-centre;

Section 6: provides a commercial leisure qualitative impact assessment;

Section 7: overall impact on the vitality and viability of centres;

Section 8: sets out our advice on the potential impact of the relocation of bulky goods retail warehouse from Waltham Cross Town Centre; and

Section 9: summarises our findings.

2.0 Impact Policy Requirements & Guidance

2.1 Introduction

2.1.1 This section of the statement summarises the impact test requirements and guidance set out in the NPPF and NPPG respectively.

2.1.2 The NPPG (paragraph 14) provides guidance on how the impact test should be used in plan making. It notes that if the Local Plan is based on meeting the assessed need for town centre uses in accordance with the sequential approach, issues of adverse impact should not arise. It goes on to state that the impact test may be useful in determining whether proposals in certain locations would impact on existing, committed and planned public and private investment, or on the role of centres.

2.1.3 Whilst impact test requirements set out in paragraph 26 of the NPPF pertains to planning application proposals for main town centre uses that are not in a centre and not in accordance with an up to date development plan, in this instance, in accordance with our commission, we have adopted them to assess the potential impact of the planned Brookfield development.

2.2 NPPF – Impact Requirements

2.2.1 Paragraph 26 of the NPPF identifies that proposals for town centre uses should be assessed in terms of the following impacts on centres:

(1) The impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and

(2) The impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area.

2.2.2 The NPPF advises that a proposal should not be allowed where it is likely to have a significant adverse impact on one or more of the above factors.

2.3 NPPG – Impact Guidance

2.3.1 Confirmation of how the impact test should be used is set out in paragraph 16 of the 'Ensuring the Vitality of Town Centres' section. The guidance states that the impact test should be undertaken in a proportionate and locally appropriate way, drawing on existing information where possible.

2.3.2 Paragraph 16 notes that as a guiding principle impact should be assessed on a like-for-like basis in respect of that particular sector. Retail uses tend to compete with their most comparable competitive facilities. It also notes that where wider town centre developments or investments are in progress, it will be appropriate to assess the impact on that investment. Key considerations are identified as including:

- The policy status of the investment (i.e. whether it is outlined in the Development Plan).
- The progress made towards securing the investment (for example if contracts are established).
- The extent to which an application is likely to undermine planned development or investments based on the effect on current/forecast turnovers, operator demand and investor confidence.

2.3.3 Paragraph 17 sets out a checklist for applying the impact test whilst paragraph 18 provides a diagram setting out some of the key steps which should be taken when carrying out an impact test in decision-taking. The checklist/steps are discussed in the next section of this study.

3.0 Retail Impact Methodology & Evidence Base

3.1 Introduction

3.1.1 The approach adopted in this impact assessment is consistent with the Practice Guidance. As noted in Section 2, Paragraph 17 and 18 of the NPPG provides a checklist/steps for applying the impact test. Each step is summarised below:

3.2 Establish Base/Design Year

3.2.1 The NPPG advises that:

- The nature of current shopping patterns should be established (base year).
- The design year is conventionally taken as the second full calendar year of trading after opening of the proposed development, but it may take longer for some developments to become established.

3.2.2 In accordance with NPPG, this assessment uses household survey evidence from the Broxbourne Retail & Leisure Study to establish the turnover of existing facilities (base year). Furthermore, in discussion and agreement with planning officers, a design year of 2024 has been adopted for testing impact. This is the second full calendar year of trading after the potential opening of the planned floorspace.

3.2.3 The impact assessment assumes that the planned retail floorspace will be delivered at the same time, rather than in a phased manner.

3.3 Examine 'no development' Scenario

3.3.1 The NPPF notes that:

- The LPA should examine what might happen if the proposed development doesn't take place.
- The assessment should acknowledge changes in the market and environment, and the role of centres.

3.3.2 Accordingly, this assessment examines a 'no development scenario'. The methodology is set out at paragraph 4.33 of Section 4.

3.4 Assessing Turnover & Trade Draw

3.4.1 The NPPG states that:

- An assessment of the turnover and trade draw of the development should be undertaken. This should draw on information from comparable schemes, operator's benchmark turnovers, and carefully considering likely catchments and trade draw;
- A range of possible scenarios should be considered to assess the impacts of the development; and
- The best way of assessing trade draw (the proportion of trade that a development is likely to receive from customers within and outside its catchment area) is to look at existing proxies of that type of development in other areas.

3.4.2 In accordance with this guidance, this assessment uses household survey evidence from the Broxbourne Retail & Leisure Study to establish the comparison and convenience goods turnover of existing facilities. A range of scenarios to assess the impacts of the planned floorspace is provided. The pattern of trade draw has been assessed having regard to the Retail & Leisure Study household survey evidence and the general assumption that 'like affects like'. Details of the turnovers of the planned floorspace are provided at paragraphs 4.2.1-4.2.2 of Section 4, the trade draw assumptions at paragraphs 4.3.7-4.3.13 of Section 4, and quantitative retail impact assessment at paragraphs 4.4.1-4.4.9 of Section 4.

3.5 Setting out the likely Impact

3.5.1 In setting out the likely impact the NPPG advises that assessments should:

- Set out the likely impact of the proposal clearly, along with any associated assumptions or reasoning, including in respect of quantitative and qualitative issues.
- Consider a range of possible scenarios in assessing the impact of the proposal on existing centres and facilities. The impact on the following should be considered: (1) existing, committed and planned investment within the given catchment; (2) town centre vitality and viability; and (3) in-centre trade, and trade in the wider area.

3.5.2 An assessment of impact on planned public and private investment is provided in Section 5. The impact of the planned retail floorspace on the vitality and viability of centres, including in-centre trade and trade in the wider area is also considered in Sections 4 and 6.

3.6 Summary

3.6.1 This impact assessment is fully in accordance with the recommendations and guidance set out in the Practice Guidance in quantifying retail impact, and comprises an 'orthodox' approach to assessing impact.

4.0 Quantitative Retail Impact Assessment

4.1 Introduction

4.1.1 In considering quantitative impact on in-centre trade this section firstly provides details of the retail turnover resulting from the level of planned retail floorspace at Brookfield before providing a detailed trading assessment of the potential impact that the planned retail floorspace is likely to have on the patterns of retail expenditure in the surrounding area.

4.1.2 Three trading assessment scenarios are provided testing the proposed 28,000sq m net comparison goods floorspace trading at different sales density levels:

- Scenario A – Low comparison goods sales density - £4,500/sq m
- Scenario B – Medium comparison goods sales density - £5,500/sq m
- Scenario C – High comparison goods sales density - £6,000/sq m

4.1.3 Having regard to: the level of planned retail floorspace; existing retail provision in Brookfield; the location of existing retail provision (notably in Harlow and Enfield); and projected turnover efficiency information provided by retail data provider Experian we consider that Scenario B represents the most likely comparison goods sales density turnover figure for the planned comparison goods floorspace at the design year (2024).

4.1.4 The sales density, and in turn the turnover, for the planned convenience goods floorspace remains the same under the three scenarios. In accordance with the NPPG published company average sales density figures have been obtained to gauge the turnover of the planned convenience goods floorspace. The convenience goods sales density (£12,000/sq m) is an average sales density based on sales densities of the leading four supermarkets (identified by Verdict.retail Research 2015). In similar fashion to the comparison goods sales density regard has been had to projected turnover efficiency information provided by retail data provider Experian.

4.1.5 At the Council's request we have also undertaken quantitative impact sensitivity testing of two comparison goods floorspace scenarios. The first testing the level of comparison goods floorspace identified in the Retail & Leisure Study Addendum (23,000sq m net - uplift in market share), the second testing the comparison goods floorspace proposed in the previous Core Strategy (35,000sq m net).

4.1.6 The statistical retail impact tables referred to throughout this section are contained at **Appendix C** and **D**.

4.2 Turnover of Brookfield Planned Retail Floorspace

4.2.1 Tables 7 and 8 (reproduced in Figure 4.1 below) sets out the turnover of the planned retail floorspace.

Figure 4.1: Proposed Planned Floorspace / Turnover Details

	Net Floorspace (sq m)	Sales Density (£/sq m)	Turnover (£m)
Comparison Goods Floorspace A. Low sales density b. Medium sales density c. High sales density	28,000	4,500 5,500 6,000	126.0 154.0 168.0
Convenience Goods Floorspace Foodstore	3,000	12,000	36.0

Notes:
Tables 7 & 8, Appendix C
2012 Prices

4.2.2 A summary of how the turnover of the planned retail floorspace has been calculated is provided below:

Comparison Goods Floorspace

- Scenario A - Applying the low comparison goods sales density to the net floorspace it is assessed the floorspace would generate a comparison goods turnover of £126.0m.
- Scenario B - Applying the medium comparison goods sales density to the net floorspace results in a comparison goods turnover of £154.0m.
- Scenario C – Applying the assessed high comparison goods sales density to the net floorspace would result in a comparison goods turnover of £168m.

Convenience Goods Floorspace

- Applying the adopted average sales density to the level of planned net floorspace it is assessed that the planned floorspace could generate a convenience goods turnover of up to £36.0m.
- It should be noted that in reality, due to the location of the existing Tesco Extra and M&S stores, an additional foodstore at Brookfield is likely to trade below company average level. Accordingly, our adopted sales density figure, and in turn the convenience goods turnover, is considered to be robust.

4.3 Trading Assessment

4.3.1 This section of the study considers the potential impact that the planned floorspace might have on the pattern of retail expenditure in the surrounding area. The analysis draws on the findings of the Retail & Leisure Study household survey which provides up to date shopping patterns for the area.

4.3.2 Set out at Tables 13a, 13b and 13c is an assessment of how the introduction of the planned retail floorspace could affect the projected retail turnovers of the defined shopping centres and retail facilities within the surrounding area.

4.3.3 As noted in Section 3 the methodological approach that has been adopted accords with that set out in the NPPG. It involves the following steps:

i) Establishing the existing (2016 (the base year)) expenditure pattern within the catchment/survey area, thereby identifying the levels of retail turnover that each identified centre derives from monies spent by households;

ii) Projecting the pattern of expenditure forward to 2024 (the design year for testing impact) assuming that each location maintains its current market share of expenditure;

iii) Assessing the pattern of trade draw to the planned floorspace utilising the existing survey derived shopping patterns in the area; and

iv) Calculating the quantitative impact of the planned floorspace, in terms of:

- The percentage reduction in trade at each store/centre at 2024; and
- The percentage change in retail turnover in each store/centre between 2016 and 2024.

Each is considered in turn below.

i) Retail Expenditure Patterns at 2016 (Tables 13a, 13b 13c, Column 1 and Tables 3 & 4)

4.3.4 The patterns of retail expenditure are set out in Column 1 of Tables 13a, 13b and 13c. The turnovers represent the combined convenience and comparison goods turnover of centres/facilities and have been calculated as follows:

- The comparison goods turnovers are derived from Table 3 and are based on the results of the Borough of Broxbourne Retail & Leisure Study household survey which are applied to the resident population. For defined centres, an allowance has been made for comparison goods trade drawn from beyond the Retail & Leisure Study Area. The turnover figures for centres outside the Borough have been derived from the latest Retail Studies for the relevant neighbouring boroughs/districts and where necessary converted to the same price base (2012 Prices).

- The convenience goods turnovers are derived from Table 4. Again these are based on the results of the Retail & Leisure Study household survey. In similar fashion to comparison goods, utilising neighbouring authorities' retail evidence base documents, an allowance has been made for convenience goods trade drawn from beyond the Retail & Leisure Study Area.

ii) Retail Expenditure Patterns at 2024 (Table 13a, 13b and 13c, Column 2 and Table 5 & 6)

4.3.5 For the purpose of this assessment it has assumed that existing retailers would gain pro rata from the increase in expenditure available to facilities in the survey areas. An allowance has been made for growth in special forms of trading (SFT) (between 2016 and 2024. SFT is defined (by retail expenditure provider, Experian) as expenditure not directed to traditional floorspace such as the internet, mail order, party plan and vending machines and other non store activity such as market and road-side stalls.

4.1.1 In terms of trade drawn from beyond the Study Area, the turnover figures for centres outside the Borough have been derived from the latest retail studies for the relevant neighbouring boroughs/districts.

iii) Patterns of Trade Draw (Tables 13a, 13b and 13c, Column 3, Tables 9, 10, 11a, 11b, 11c)

4.1.2 Column 3 of Tables 13a, 13b and 13c set out the residual total combined convenience and comparison goods retail turnover of centres/retail facilities after the planned Brookfield floorspace.

4.1.3 Table 9 sets out the pattern of comparison goods trade draw to the comparison goods floorspace planned at Brookfield. Table 10 sets out the pattern of convenience goods trade draw to the planned convenience goods floorspace.

4.1.4 The pattern of comparison and convenience goods trade to the planned floorspace has been assessed having regard to the trade draw patterns of existing retail facilities at Brookfield. Existing comparison goods retailers include: M&S, Next, Outfit, River Island, New Look, Boots, JD Sports, Argos, and Clarks. Convenience goods retailers at Brookfield are represented by a Tesco Extra and M&S (food hall).

4.1.5 Figure 4.2 below shows the amount and proportion of comparison and convenience goods expenditure existing retail facilities in Brookfield draw from each survey zone.

Figure 4.2: Pattern of Retail Expenditure Drawn to Existing Retail Facilities in Brookfield, by Zone

		1	2	3	4	5	6	7	8	9	10	11	12	13	Beyond Zones	Total
Comparison Goods	£m	13.9	21.0	23.9	37.9	1.5	13.0	17.2	13.0	10.6	2.7	14.0	13.5	1.9	9.2	193.2
	%	7	11	12	20	1	7	9	7	6	1	7	7	1	5	100
Convenience Goods	£m	5.7	14.8	24.1	31.5	0.9	1.1	4.1	1.5	10.1	1.3	9.1	-	2.3	3.2	109.7
	%	5	13	22	29	1	1	4	1	9	1	8	-	2	3	100

Source: Tables 9 & 10, Appendix C
Notes: Figures may not add due to rounding
2012 Prices

4.1.6 Figure 4.3 sets out the amount of convenience and comparison goods expenditure assessed to be drawn from each zone to the planned floorspace.

Figure 4.3: Pattern of Expenditure Drawn to Planned Floorspace, by zone (£m)

	1	2	3	4	5	6	7	8	9	10	11	12	13	Beyond Zones	Total
Comparison Goods															
a) Low Sales Density	9.0	13.7	15.6	24.7	1.0	8.5	11.2	8.5	6.9	1.8	9.1	8.8	1.2	6.0	126.0
b) Medium Sales Density	11.0	16.7	19.0	30.2	1.2	10.3	13.7	10.4	8.5	2.2	11.2	10.7	1.5	7.3	154.0
C) High Sales Density	12.0	18.2	20.8	32.9	1.3	11.3	14.9	11.3	9.2	2.4	12.2	11.7	1.7	8.0	168.0
Convenience Goods	1.9	4.8	7.9	10.3	0.3	0.4	1.3	0.5	3.3	0.4	3.0	-	0.8	1.0	36.0

Source: Tables 9 & 10, Appendix C
Notes: Figures may not add due to rounding
2012 Prices

4.1.7 The amount of trade assessed to be drawn from each zone has been assessed having regard to:

- the character of the planned development and the general assumption that 'like affects like';
- the existing shopping patterns within each zone; and
- the location of existing retail facilities.

4.1.8 The residual comparison goods expenditure on a zonal basis after the planned floorspace is set out in Tables 11a (low sales density), 11b (medium sales density) and 11c (high sales density). Table 12 provides the residual convenience goods expenditure on a zonal basis after the Brookfield planned floorspace.

4.2 Assessed Levels of Trade Diversion

Trade Diversion to Planned Retail Floorspace at Brookfield

4.2.1 We set out two measures of retail impact in our statistical tables (Tables 13a, 13b & 13c) (partly reproduced in Figure 4.4 below):

- the change in the turnover of centres in the period 2016-2024 following the development of the planned floorspace; and
- the impact of the planned floorspace on the calculated 2024 turnover of centres.

Figure 4.4: Potential Trading Effects of Planned Brookfield, 2024

	Impact of Planned Brookfield (Scenario A)		Impact of Planned Brookfield (Scenario B)		Impact of Planned Brookfield (Scenario C)	
	Change in Turnover 2016-2024	Impact on 2024 Turnover	Change in Turnover 2016-2024	Impact on 2024 Turnover	Change in Turnover 2016-2024	Impact on 2024 Turnover
Centres inside Borough						
Waltham Cross Town Centre	+16.5%	-4.1%	+15.6%	-4.8%	+15.2%	-5.2%
Hoddesdon Town Centre	+5.9%	-3.1%	+5.8%	-3.2%	+5.7%	-3.3%
Cheshunt District Centre	+17.7%	-2.1%	+17.3%	-2.3%	+17.2%	-2.5%
Centres Outside Borough						
Harlow Town Centre	+42.4%	-4.3%	+41.0%	-5.2%	+40.3%	-5.7%
Enfield Town Centre	+32.6%	-4.6%	+31.2%	-5.6%	+30.5%	-6.1%
Welwyn Garden City Town Centre	+16.5%	-3.4%	+15.6%	-4.2%	+15.1%	-4.6%
Hertford Town Centre	+14.2%	-3.2%	+13.5%	-3.8%	+13.1%	-4.1%
Hatfield Town Centre	+26.1%	-1.3%	+25.7%	-1.6%	+25.6%	-1.8%
Stevenage Town Centre	+20.2%	-1.3%	+19.9%	-1.6%	+19.7%	-1.7%
Ware Town Centre	+14.1%	-2.0%	+13.8%	-2.3%	+13.7%	-2.4%

Source: Tables 13a, 13b, and 13c, Appendix C
Figures may not add due to rounding
2012 Prices

4.2.2 The key changes following the planned Brookfield development between 2016-2024 is assessed as follows:

- There will be an increase in the retail turnover of all centres within the period 2016-2024. Of particular note, even assuming the worst case scenario (Scenario C – High Sales Density) Waltham Cross Town Centre, Hoddeston Town Centre and Cheshunt District Centre are assessed to see an increase in retail turnover of 15.2%, 5.7% and 17.2% respectively. In terms of centres outside the Borough all are assessed to see an increase in retail turnover by in excess of 13% (assuming worst case Scenario C) with the retail turnovers of Harlow and Enfield town centres expected to increase by 40.3% and 30.5% respectively. These increases are largely attributable to the growth in retail expenditure in the period.

4.2.3 Accordingly, the assessment identifies that the retail economies of the examined centres are all assessed to experience growth.

4.2.4 In terms of the impact on the calculated 2024 turnover of centres/facilities. Assuming the most likely comparison goods sales density scenario (Scenario B – Medium Sales Density) the following is assessed:

- In terms of centres within the Borough, Waltham Cross Town Centre is assessed to experience an impact of 4.8% (5.2% under High Sales Density Scenario C), Hoddesdon Town Centre an impact of 3.2% (3.3% under Scenario C) and Cheshunt Old Pond District Centre an impact of 2.3% (2.5% under Scenario C).

- In the case of centres outside the Borough all centres are estimated to experience an impact of less than 5.6% (6.1% under High Sales Density Scenario C). In particular, Harlow Town Centre is estimated to experience an impact of 5.2% (5.7% under Scenario C), Enfield Town Centre an impact of 5.6% (6.1% under Scenario C), Welwyn Garden City Town Centre an impact of 4.2%

(4.6% under Scenario C), and Hertford 3.8% (4.1% under Scenario C). Hatfield, Stevenage and Ware town centres are all assessed to experience an impact of below 2.3% (2.4% under Scenario C).

4.2.5 The impact levels identified above are considered to be low. Furthermore, the identified retail turnover growth is considered to have mitigating effects on the examined impact arising from trade diversion to the planned Brookfield development.

4.2.6 At this point it is worth highlighting, by way of a helpful comparison, the impact levels assessed in the previous Core Strategy retail and leisure evidence base document titled 'Retail and Town Centres: Evidence Base Bridging Report' undertaken by GVA Grimley on behalf of the Council in 2010. The study assessed that the planned retail floorspace (35,000sq m net comparison goods floorspace) within Brookfield would result in the following levels of impact (at 2018):

- Waltham Cross Town Centre – 5.8%;
- Hoddesdon Town Centre – 2.9%;
- Enfield Town Centre – 7%;
- Harlow Town Centre – 7%; and
- Welwyn Garden City – 5.2%.

Cumulative Impact with Brookfield Retail Park Extension Commitment

4.2.7 Tables 13a, 13b and 13c also set out separate cumulative impact figures taking into account the proposed 2,446sq m gross comparison goods extension retail commitment at Brookfield Retail Park (application ref: 07/16/0166/F).

4.2.8 The Brookfield Retail Park extension comprises of an increase in mezzanine floorspace of 2,044sq m gross in Units 3 and amalgamated Unit 1b and a 402sq m extension to amalgamated Unit 1b. The turnover of the additional floorspace (£8.4m) has been calculated by applying a net floorspace of 1,957sq m net (assuming an 80%/20% net/gross floorspace split) to a retail warehouse sales density of £4,300/sq m (average sales density of non-bulky comparison goods retailers (derived from Mintel Retail Rankings 2014)). Our assessed trade draw patterns have regard to: the character of the planned development and the general assumption that 'like affects like'; the existing shopping patterns within each zone, and the location of existing retail facilities.

4.2.9 The assessed cumulative levels of trade diversion are partly reproduced in Figure 4.5 below.

Figure 4.5: Potential Cumulative Trading Effects of Planned Brookfield & Brookfield Retail Park Extension, 2024

	Cumulative Impact (Scenario A)		Cumulative Impact (Scenario B)		Cumulative Impact (Scenario C)	
	Change in Turnover 2016-2024	Impact on 2024 Turnover	Change in Turnover 2016-2024	Impact on 2024 Turnover	Change in Turnover 2016-2024	Impact on 2024 Turnover
Centres inside Borough						
Waltham Cross Town Centre	+16.2%	-4.3%	+15.3%	-5.0%	+14.9%	-5.4%
Hoddesdon Town Centre	+5.9%	-3.1%	+5.7%	-3.3%	+5.6%	-3.3%
Cheshunt District Centre	+17.6%	-2.2%	+17.2%	-2.4%	+17.1%	-2.6%
Centres Outside Borough						
Harlow Town Centre	+41.9%	-4.6%	+40.5%	-5.5%	+39.8%	-6.0%
Enfield Town Centre	+32.2%	-4.9%	+30.8%	-5.9%	+30.1%	-6.4%
Welwyn Garden City Town Centre	+16.2%	-3.6%	+15.3%	-4.4%	+14.8%	-4.8%
Hertford Town Centre	+14.0%	-3.3%	+13.2%	-4.0%	+12.9%	-4.3%
Hatfield Town Centre	+26.0%	-1.4%	+25.6%	-1.7%	+25.5%	-1.8%
Stevenage Town Centre	+20.1%	-1.4%	+19.8%	-1.7%	+19.6%	-1.8%
Ware Town Centre	+14.1%	-2.0%	+13.8%	-2.3%	+13.7%	-2.4%

Source: Tables 13a, 13b, and 13c, Appendix C
Figures may not add due to rounding
2012 Prices

4.2.10 Figure 4.5 shows that if the Brookfield Retail Park extension retail commitment is included in the assessment of impact with the planned Brookfield retail floorspace all defined centres are likely to experience only a marginal increase in impact (no more than a 0.3%).

4.3 Quantitative Impact Sensitivity Testing

4.3.1 At the Council's request we have also undertaken quantitative impact sensitivity testing of two comparison goods floorspace scenarios. The first testing the level of comparison goods floorspace capacity identified in the Retail & Leisure Study Addendum (23,000sq m net - uplift in market share scenario), and the second testing the comparison goods floorspace proposed in the previous Core Strategy (35,000sq m net).

4.3.2 As assessed in the main impact assessment, in addition to the comparison goods floorspace the testing also includes a 3,000sq m net foodstore. The quantitative retail impact figures provided below are cumulative impact figures which take into account the Brookfield Retail Park extension retail commitment.

4.3.3 The Quantitative Impact Sensitivity Testing statistical tables are set out at **Appendix D**.

Sensitivity Testing 1 – Retail & Leisure Study Comparison Goods Capacity Floorspace (Uplift in Market Share)

4.3.4 Figure 4.7 below summarises the assessed cumulative levels of trade diversion for Sensitivity Testing 1. The detailed statistical retail impact tables which Figure 4.7 summarise are Tables Fi, Fii, and Fiii at Appendix D.

Figure 4.7: Sensitivity Testing 1 (Brookfield providing 23,000sq m net comparison goods floorspace) - Potential Cumulative Trading Effects, 2022

	Cumulative Impact (Scenario A)		Cumulative Impact (Scenario B)		Cumulative Impact (Scenario C)	
	Change in Turnover 2016-2024	Impact on 2024 Turnover	Change in Turnover 2016-2024	Change in Turnover 2016-2024	Impact on 2024 Turnover	Change in Turnover 2016-2024
Centres inside Borough						
Waltham Cross Town Centre	+16.9%	-3.7%	+16.2%	-4.3%	+15.8%	-4.6%
Hoddesdon Town Centre	+6.0%	-3.0%	+5.9%	-3.1%	+5.8%	-3.2%
Cheshunt District Centre	+17.8%	-1.9%	+17.6%	-2.2%	+17.4%	-2.3%
Centres Outside Borough						
Harlow Town Centre	+43.1%	-3.8%	+41.9%	-4.6%	+41.3%	-5.0%
Enfield Town Centre	+33.3%	-4.1%	+32.2%	-4.9%	+31.6%	-5.3%
Welwyn Garden City Town Centre	+17.0%	-3.0%	+16.2%	-3.7%	+15.8%	-4.0%
Hertford Town Centre	+14.6%	-2.8%	+14.0%	-3.4%	+13.7%	-3.6%
Hatfield Town Centre	+26.3%	-1.2%	+26.0%	-1.4%	+25.8%	-1.5%
Stevenage Town Centre	+20.4%	-1.2%	+20.1%	-1.4%	+22.0%	-1.5%
Ware Town Centre	+14.4%	-1.8%	+14.1%	-2.0%	+14.0%	-2.1%

Source: Tables Ei, Eii and Eiii, Appendix D
Figures may not add due to rounding
2012 Prices

4.3.5 Figure 4.7 illustrates, as we would anticipate, that due to the lower level of comparison goods floorspace proposals (-5,000sq m net) and the subsequent lower level of comparison goods turnover, the assessed levels of impact on all defined centres are lower than that assessed in earlier assessment. Furthermore all centres are expected to benefit from further increases in their retail turnovers in the period 2016-2024.

4.3.6 In terms of impact on the 2024 retail turnover of centres, adopting what we consider to be the most realistic scenario, Scenario B, all assessed centres are anticipated to experience impacts of no more 4.9%. Waltham Cross Town Centre is assessed to experience an impact of 4.3%, Hoddesdon Town Centre, 3.1% and Cheshunt District Centre just 2.2%.

Sensitivity Testing 2 – Previous Core Strategy Comparison Goods Floorspace (Tested in July 2010 Core Strategy Bridging Report)

4.3.7 The previous Core Strategy planned for 35,000sq m net comparison goods floorspace at Brookfield. This is some 7,000sq m net more comparison goods floorspace more than currently planned in the Local Plan (28,000sq m net).

4.3.8 The assessed cumulative levels of trade diversion for Sensitivity Testing 2 are set out in Tables Gi, Gii and Giii at Appendix D and are partly reproduced in Figure 4.8 below.

Figure 4.8: Sensitivity Testing 2 (Brookfield Providing 35,000sq m net comparison goods floorspace) - Potential Cumulative Trading Effects, 2022

	Cumulative Impact (Scenario A)		Cumulative Impact (Scenario B)		Cumulative Impact (Scenario C)	
	Change in Turnover 2016-2024	Impact on 2024 Turnover	Change in Turnover 2016-2024	Change in Turnover 2016-2024	Impact on 2024 Turnover	Change in Turnover 2016-2024
Centres inside Borough						
Waltham Cross Town Centre	+15.1%	-5.3%	+14.1%	-6.0%	+13.6%	-6.5%
Hoddesdon Town Centre	+5.7%	-3.3%	+5.5%	-3.5%	+5.4%	-3.6%
Cheshunt District Centre	+17.1%	-2.5%	+16.8%	-2.8%	+16.5%	-3.0%
Centres Outside Borough						
Harlow Town Centre	+40.1%	-5.8%	+38.6%	-6.8%	+37.7%	-7.4%
Enfield Town Centre	+30.4%	-6.2%	+28.9%	-7.3%	+28.0%	-7.9%
Welwyn Garden City Town Centre	+15.0%	-4.6%	+14.0%	-5.4%	+13.5%	-5.9%
Hertford Town Centre	+13.0%	-4.2%	+12.2%	-4.9%	+11.7%	-5.3%
Hatfield Town Centre	+25.5%	-1.8%	+25.2%	-2.1%	+24.9%	-2.2%
Stevenage Town Centre	+19.7%	-1.8%	+19.3%	-2.1%	+19.1%	-2.2%
Ware Town Centre	+13.8%	-2.3%	+13.4%	-2.6%	+13.2%	-2.8%

Source: Tables Gi, Gii and Giii, Appendix D
Figures may not add due to rounding
2012 Prices

4.3.9 Under Sensitivity Testing 2 the impact on the 2024 retail turnover of centres is expected to be greater with the following impacts, under Scenario B, assessed:

- Waltham Cross Town Centre - 6.0% (increase of 1.0% when compared to impact of now planned floorspace);
- Hoddesdon Town Centre - 3.5% (increase of 0.2%);
- Harlow Town Centre - 6.8% (increase of 1.3%);
- Enfield Town Centre – 7.3% (increase of 1.4%); and
- Welwyn Garden City Town Centre – 5.4% (increase of 1.0%).

4.3.10 Notwithstanding the above impacts all centres are still anticipated to benefit from an increase in retail turnover in the period 2016-2024.

5.0 Impact on Existing, Committed & Planned In-Centre Investment

5.1 Introduction

5.1.1 Paragraph 17 of the NPPG notes that where wider town centre developments or investments are in progress it will be appropriate to assess the impact of relevant proposals on that investment. Key considerations will include:

- The policy status of the investment (i.e. whether it is outlined in the Development Plan).
- The progress made towards securing the investment (for example if contracts are established).
- The extent to which an application is likely to undermine planned development or investments based on the effect on current/forecast turnovers, operator demand and investor confidence.

5.1.2 Having regard to the existing shopping patterns identified in the Broxbourne Retail & Leisure Study impact on existing, committed and planned in-centre investment in the following centres has been duly considered:

Centres within Borough

- Waltham Cross Town Centre;
- Hoddesdon Town Centre; and
- Cheshunt Old Pond District Centre.

Centres outside Borough

- Harlow Town Centre;
- Enfield Town Centre;
- Welwyn Garden City Town Centre;
- Hertford Town Centre;
- Hatfield Town Centre;
- Stevenage Town Centre; and
- Ware Town Centre.

5.1.3 In reviewing whether there is any public or private investment committed/planned in the centres outside the Borough we have had regard to discussions/correspondence with the following planning policy officers in neighbouring authorities:

- Vicky Forgione (Planning Policy Officer) - Harlow District Council;
- Gerry Ansell (Planning Policy Team Leader) - Enfield Council;
- Sue Tiley (Planning Policy Manager) & Paul Everard (Principal Policy Officer)- Welwyn Hatfield Borough Council;
- Richard Javes (Planning & Transport Policy Manager) - Stevenage Borough Council; and
- Jenny Pierce (Principal Planning Officer) - East Herts Council.

We have also had regard to site allocations in the relevant development plan and emerging planning documents.

5.1.4 A schedule providing details of relevant existing, planned and committed investment within centres outside the Borough is attached at **Appendix E**.

5.2 Impact of Investment in Centres within the Borough

Waltham Cross Town Centre

5.2.1 The Waltham Cross Town Centre Strategy (March 2015) identifies an area to the north of Waltham Cross Town Centre as an opportunity zone for redevelopment. The 'Northern High Street Opportunity Zone' includes two bulky comparison goods retail warehouses. The retail warehouses are currently occupied by retailers Wickes and Homebase. The existing Wickes and Homebase stores turn their back on the town centre and are not currently encouraging linked trips with other parts of the centre. The Council had been planning a retail led development on this site anchored by a foodstore and prospective relocations from elsewhere within the centre. However, after engaging with retailers it became apparent that the location and configuration of the site did not fit with retailer requirements. The Council is now pursuing the regeneration of the site as a residential led apartment development potentially with limited commercial uses along the High Street.

5.2.2 Planning officers have indicated that the total potential commercial floorspace on the site would not exceed 4,000sq m which would consist of A3 (eating and drinking), A1 (retail) and B1 (office) uses. Up to 2,500 square metres of this floorspace could potentially be for retail (the majority of which would be as a result of the redevelopment of existing retail floorspace) with prospective retail, and non-retail occupiers anticipated to be mainly local businesses. The economic viability of this development is likely to be anchored by the residential elements rather than the commercial floorspace. Accordingly, the planned Brookfield development is not considered to undermine its feasibility.

5.2.3 In addition to the above we are also aware that there are current plans for a £650,000 town centre regeneration project which will involve pedestrianising the Roundel and public realm improvements. The project is due to be implemented in August 2016. Due to the nature of this project (primarily environmental improvements) and the fact funding has already been secured we do not consider that the planned retail and leisure floorspace within Brookfield would materially harm this investment.

Hoddesdon Town Centre

5.2.4 The Council has confirmed that there are no significant retail or leisure development in the pipeline or planned. The main potential development sites for retailing/leisure in the town centre have been taken up over the last five years, in particular through the Fawkon Walk and Tower Centre Development which are now fully let. Accordingly, with the exception of general environmental quality improvements within the town centre there are currently no investment plans (committed or proposed) in Hoddesdon Town Centre.

Cheshunt Old Pond District Centre

5.2.5 We are not aware of any retail/leisure development opportunity sites in this relatively small centre. Officers in the Council have also confirmed that at the current time there are no relevant investment plans/schemes in Cheshunt Old Pond District Centre.

5.3 Impact of Investment in Centres outside the Borough

Harlow Town Centre

5.3.1 Planning officers at Harlow District Council have confirmed that there are two planned/committed investment schemes in Harlow Town Centre. These are:

- A new cinema and restaurant/cafe development within the Harvey Centre; and
- The change of use of former M&S Unit, Broad Walk, to provide four A1, one A2, two A3 and 1 D2 gym unit.

5.3.2 Both investment schemes have now been implemented and the majority of units, including the new cinema (occupied by Cineworld) are now open and trading.

5.3.3 In light of the stage in which these investment schemes have reached, and the fact that occupiers are already in place, the planned retail and leisure development at Brookfield is unable to prejudice, delay or impact upon these investments.

Enfield Town Centre

5.3.4 Planning officers at Enfield Borough Council have identified that the only potential relevant retail and leisure investment site for Enfield Town Centre is the 'Town Centre Station Area'. This 2.5ha site is identified for retail-led mixed use redevelopment within the 2010 Adopted Core Strategy (Policy CP42). The redevelopment of the site is identified as a priority in the Core Strategy with its redevelopment comprising an improved transport interchange, up to 10,000sq m of retail floorspace, 500 new homes, a new primary school and community uses.

5.3.5 We have been informed that initial preliminary talks have been held with the landowners regarding the sites potential redevelopment and the Council intend to consult with local businesses in the near future. No masterplan has been drafted as of yet. Officers have confirmed that there are no timescales with regard to the delivery of the sites redevelopment.

Welwyn Garden City Town Centre

5.3.6 We understand from discussions with planning officers at Welwyn Hatfield Borough Council that there are currently two planned investment sites within/on the edge of Welwyn Garden City Town Centre. Both sites are identified in the adopted and emerging Local Plans:

- Town Centre North Development Site (1.2ha)
- Former Shredded Wheat Factory (12.6ha)

5.3.7 The Town Centre North Development Site is identified for up to 5,800sq m gross retail floorspace which could potentially involve new retail development at ground and lower ground floor with residential above together with an expansion to the existing Debenhams store. Planning officers have confirmed that there are currently no plans or timescales for the redevelopment of this site.

5.3.8 In terms of the former Shredded Wheat Factory this edge of centre site is allocated for employment led mixed use development. The site is not identified for leisure uses and retail is only identified as an ancillary part of the sites potential redevelopment. There is a 'live' planning application and listed building consent application for the redevelopment of the site comprising a 850 residential units, a hotel, offices, Class A3/A4 restaurants/cafe (1,928sq m gross), Creche, a gym, dance, exercise studio, and small scale retail (571sq m gross). The applications are currently undetermined and, at the time of writing, it is unclear whether the Council support the redevelopment scheme. Should the investment scheme be granted planning permission it is very unlikely due to, *inter alia*, the limited amount of retail and leisure uses proposed, that the planned Brookfield retail and leisure floorspace would prejudice the investment coming forward.

Hertford Town Centre

5.3.9 Planning officers in East Hert Council have confirmed the following relevant existing/planned/committed investment sites within/on the edge of Hertford Town Centre:

- Riverside Yards (1.0ha)
- Bircherley Green Shopping Centre (0.8ha);
- The Marquee, Railway Street (0.1ha)
- Opportunity Site, East of Fore Street (0.1h); and
- McMullen's Brewery Site (1.7ha).

5.3.10 The Riverside Yards site is identified for mixed use residential, retail and community use development in the Adopted Local Plan. We understand that development has commenced on part of the site for 6 flats, 2 houses and 2 commercial B1a use class units. Planning officers at the Council have confirmed that there are currently no other plans/timescales for the redevelopment of the remainder of the site.

5.3.11 In terms of Bircherley Green Shopping Centre we understand that Bircherley Green Regeneration have previously consulted on a mixed use development scheme in 2014. The scheme included a Waitrose store, revitalised and new retail/service units, residential units and a 150 space car park. We understand that the proposals have now been abandoned and an alternative scheme is currently being considered. At the time of writing there were no timescale or plans for the redevelopment of the shopping centre.

5.3.12 The Marquee site has planning permission for small scale retail (457sq m) and a gym use. The planning permission is currently being implemented and we understand that end occupiers have already been secured. Accordingly, in light of the position regarding the delivery of investment on this site it is considered that there is no investment to delay, prejudice, or impact on.

5.3.13 The potential opportunity site, East of Fore Street is identified as an opportunity to provide a larger M&S Foodhall. There are currently no plans for the development of this site by M&S or another party. In any event we do not consider that the planned retail and leisure floorspace at Brookfield, which is unlikely to include an M&S (due to the existing M&S store in Brookfield) would impact on M&S's potential investment decision to extend and improve their existing facility in the town centre.

5.3.14 The McMullen's Brewery site has planning permission and listed building consent for a mixed use redevelopment comprising a foodstore, offices, commercial and community space. We understand from planning officers that the scheme has been developed and Sainsbury's occupy the foodstore element. Accordingly, as a result of the investment already being delivered on this site there is no investment to delay, prejudice, or impact upon.

Hatfield Town Centre

5.3.15 Planning officers at Welwyn Hatfield Borough Council have confirmed that the only potential investment planned in Hatfield Town Centre is that identified under Saved Policy TCR14 of the Adopted District Plan: Land at the Eastern End of Hatfield Town Centre. The plan identifies the site for comprehensive redevelopment and being suitable for a mix of uses including retail, cafes/restaurants, offices, housing, community facilities, markets, a new bus interchange and car parking.

5.3.16 Phase 1 (5 shops/cafe units and 15 residential units) was completed in the summer of 2014. However, the Council has recently parted company with its development partner, St Modwen. Planning officers have confirmed that they do not currently have a development partner in place and that there are no current timescales for its redevelopment.

5.3.17 We also understand that minor refurbishment works are currently taking place to residential and retail units at the eastern end of the town centre.

Stevenage Town Centre

5.3.18 We have been informed by planning officers at Stevenage Borough Council that there are currently six areas/sites that are identified for potential redevelopment in the Council's adopted/emerging Local Plan. These sites are:

- Northgate Major Opportunity Area;
- Marshgate Major Opportunity Area;
- Former Matalan Site;
- Station Gateway Major Opportunity Area;
- Central Core Major Opportunity Area; and
- Centre West Major Opportunity Area.

5.3.19 Firstly, in terms of the Northgate Major Opportunity Area, the Council's emerging Local Plan envisages a comprehensive mixed use development providing new A1, A3 and A4 floorspace, a replacement Tesco store, offices, and a multi storey car park. The redevelopment is largely dependent on Tesco who we understand are not seeking to invest in a replacement store at the current time. Accordingly, there are currently no investment plans for this site.

5.3.20 The Marshgate Major Opportunity Area is also identified for comprehensive mixed use redevelopment in the Council's emerging Local Plan. The plan envisages up to 150 residential units, a new multi-storey car park, up to 3,800sq m gross A1, A3, A4, bar restaurant and cafe use, and up to 5,000sq m leisure, cultural and civic uses (sports and leisure facilities, art centre and community facility). Planning officers have confirmed that the redevelopment of the site is at an early stage of discussion and is partially reliant on elements of the Station Gateway Major Opportunity Area. There are currently no plans, timescales or committed developer interest in the redevelopment of this site.

5.3.21 The former Matalan site currently benefits from outline planning permission for 526 residential apartments and ancillary A1, A2 and A3 floorspace (1,670sq m gross). Planning officers have indicated that negotiations are on-going between the land owners and the Council to jointly bring forward the scheme. In light of the nature and scale of uses proposed the planned retail and leisure floorspace at Brookfield would not prejudice this investment scheme coming forward.

5.3.22 The Station Gateway Major Opportunity Area includes the Train Station the Arts and Leisure Centre and car parks. The emerging Local Plan identifies potential for a regenerated Train Station, new Bus Station, residential development, multi storey car parking, offices, a hotel and up to 2,800sq m gross A1 and A3 use class floorspace. Planning officers at the Council have confirmed that a masterplan for a new train station building has been agreed with Network Rail and options are currently being considered for a replacement bus station. There are currently no plans for the other uses envisaged for the site in the emerging Local Plan.

5.3.23 The redevelopment of the Central Core Major Opportunity Area, we understand, will involve significant land assembly issues being resolved before it can be bought forward for redevelopment. Planning officers have indicated that the delivery of the envisaged substantial mixed use redevelopment of the site will rely on the relocation of the bus station. In the absence of any current timetable or redevelopment plans it is not clear if or when this site would come forward.

5.3.24 The Centre West Major Opportunity Area is identified, in the emerging Local Plan, for high density residential development, replacement leisure park uses, a new multi storey car park, new office premises, a hotel, and an ancillary convenience store to serve new residents. The site is currently in active uses as a leisure park and we are not aware that the current owners, Legal & General, are interested in the sites redevelopment. Notwithstanding this, having regard to the uses envisaged for the site the planned retail and leisure floorspace at Brookfield would not prejudice such an investment scheme coming forward.

Ware Town Centre

5.3.25 East Herts Council planning officers have identified that the only potential investment planned within/on the edge of Ware Town Centre is at the disused former nightclub, 20 Amwell End. The unit, located in the defined Primary Shopping Frontage, is currently subject to a planning application for part demolition and redevelopment with small scale commercial/retail use at ground floor (394sq m gross) and residential units above.

5.3.26 In light of the small scale nature of the proposal and the fact that it is residential led it is considered that the proposed Brookfield development will not adversely delay, prejudice, or impact this investment.

6.0 Commercial Leisure Qualitative Impact Assessment

6.1 Introduction

6.1.1 In this section of the report we assess the potential qualitative impact of a new small multiplex cinema, food and drink uses, and health and fitness gym facility planned for Brookfield on relevant centres within and outside the Borough.

6.2 Planned D2 Cinema

6.2.1 The planned cinema is anticipated to consist of a small multiplex facility of up to 2,500sq m potentially providing up to 6 screens. For the purpose of this impact assessment we assume that the cinema will be operated by a national operator, open 7 days a week, and screen the latest blockbuster films.

6.2.2 Broxbourne has no dedicated cinema facilities within its Borough. The Spotlight (formerly Civic Hall), a multi-venue facility in Hoddesdon Town Centre, does show the occasion film but only provides one temporary screen, doesn't show all the blockbusters (showing just children films in the school holidays), the frequency of screening is very limited, and the use of the facility for films is inconsistent and largely dependent on whether the facility is being used as a theatre.

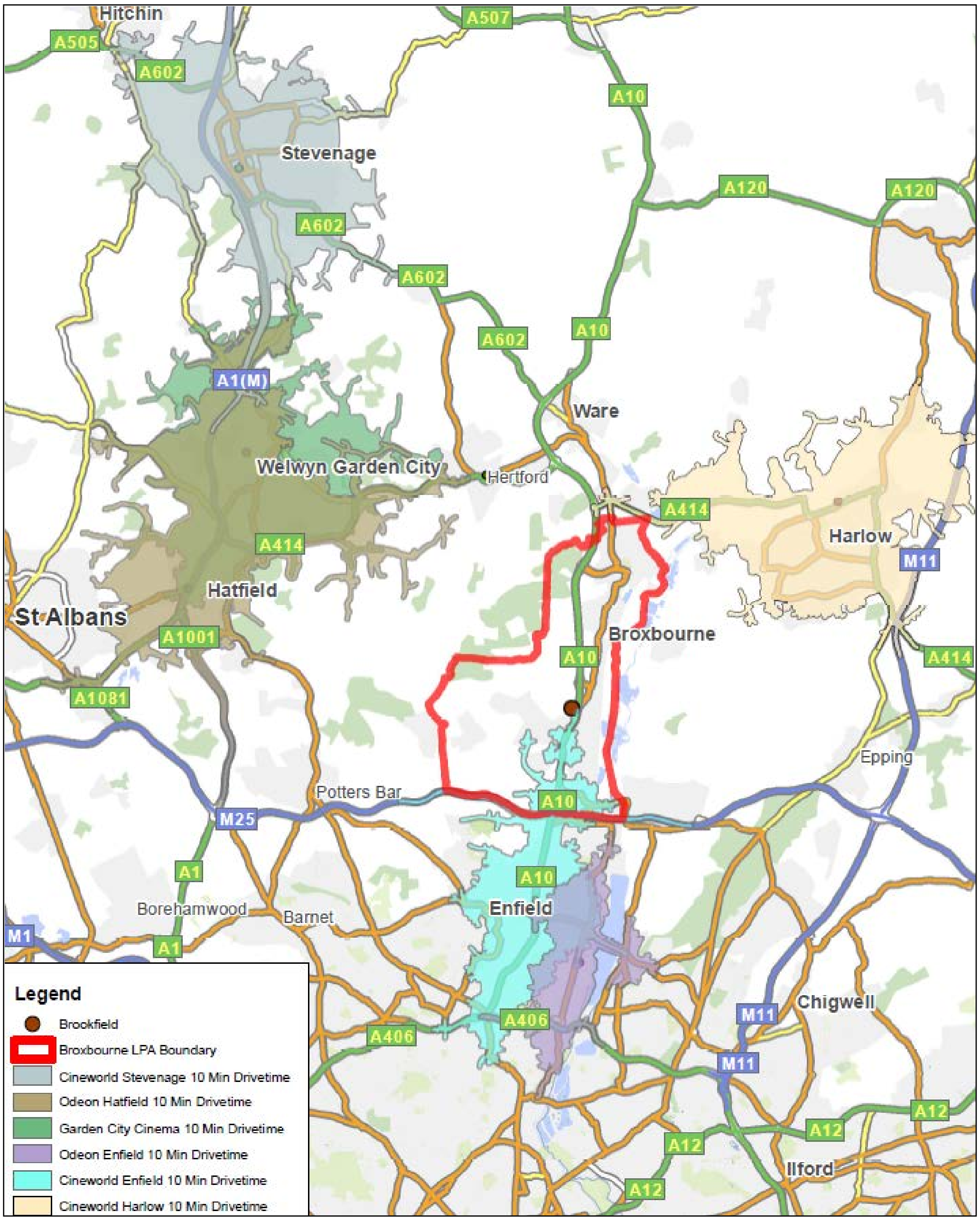
6.2.3 As evidenced by the Borough of Broxbourne Retail & Leisure Study Broxbourne residents who visit the cinema primarily visit the out-of-centre Cineworld complexes in Enfield, Southbury Leisure Park, and Harlow, Queensgate Centre (accounting for 85% of cinema trips (within Study Area)). Accordingly, a significant proportion of cinema trips by Broxbourne residents currently take place outside of the Borough.

6.2.4 The other main cinema facilities within neighbouring authorities include:

- Odeon, Lee Valley Leisure Complex, Enfield (out-of-centre)– 12 screens;
- Garden City Cinema, Welwyn Garden City (edge-of-centre) – 3 screens;
- Odeon, The Galleria Outlet, Hatfield (out-of-centre) – 12 screens; and
- Cineworld, Stevenage Leisure Park, Stevenage (out-of-centre) – 16 screens.

6.2.5 Figure 6.1 below shows the location of existing main cinema facilities and their 10 minute drivetime. The plan illustrates the existing gap/void of an accessible cinema facility for Broxbourne residents.

Figure 6.1: Plan Showing Location of Existing Main Cinema Facilities



6.2.6 Furthermore, as noted previously in Section 5, an additional 6 screen cinema is currently being developed within the Harvey Centre in Harlow Town Centre. A pre-let has been agreed with Cineworld to occupy the new cinema.

6.2.7 Visitors/users of the planned cinema facility at Brookfield are anticipated to involve a mix of:

1) new residents of the planned 1,500 dwellings in Brookfield;

2) cinema visitors within the Borough who currently do not visit a cinema; and

3) existing cinema visitors currently using other cinema facilities, primiarly outside of the Borough.

6.2.8 In terms of cinema visitors who currently do not visit a cinema it is noted that the Retail and Leisure Study 2015 identifies that just over 50% of respondents of the associated household survey did not currently visit a cinema. Whilst there may be numerous reasons for this, and the provision of a new multiplex cinema is not necessarily expected to result in all respondents visiting a cinema in the future, it is considered likely that as a result of a new accessible and convenient cinema a proportion of these residents may decide to partake in a cinema visit. Accordingly, these visits would not result in any customer diversion from existing facilities.

6.2.9 Turning to the potential impact on existing cinema facilities, it is anticipated that the planned cinema will primarily compete with similar multiplex cinemas outside the Borough. Based on the evidence within the Retail and Leisure Study 2015, and the distance/drivetimes from existing cinema facilities, the planned cinema is anticipated to compete primarily with out-of-centre cinema facilities in Enfield, Harlow, and to a lesser extend Hatfield, Welwyn Garden City and Stevenage. Due to the out of centre location of these cinema facilities they do not benefit from town centre use policy protection. In terms of the Spotlight venue in Hoddesdon due to its limited role and infrequency/type of films shown potential impact on this facility is anticipated to be minimal. Finally, in terms of the proposed cinema at the Harvey Centre in Harlow Town Centre, in light of the fact that a pre-let has already been secured for Cineworld and the development is well advanced the planned cinema at Brookfield is not considered to prejudice or delay the scheme in any way.

6.2.10 Accordingly, it is assessed that the planned cinema facility at Brookfield is not considered to result in any significant adverse impact on any existing cinema facilities within relevant defined centres.

6.3 Planned D2 Health and Fitness Gym Facility

6.3.1 A new health and fitness gym facility is planned within Brookfield. For the purpose of this assessment we have assumed that the gym is likely to be occupied by a national budget gym operator.

6.3.2 The planned gym is intended to:

1) serve the existing and planned houses in Brookfield;

2) serve people working in existing and planned facilities in Brookfield; and

3) provide a complementary use for shoppers undertaking a shopping trip in Brookfield and the wider Brookfield area.

6.3.3 It is assessed that members/users of the new modern gym will be: (1) new gym users who currently do not use a gym; and (2) existing gym users currently using other gym facilities in the vicinity of the site.

6.3.4 It is widely acknowledged that people who visit a gym choose one that is either convenient to their place of work or convenient to their place of residence. They generally serve a specific and reasonably small catchment area. In this instance we understand that the planned new gym facility is intended to primarily serve residents who live, and employees that work (both current and planned), in the Brookfield area.

6.3.5 It is noted that the Retail and Leisure Study identifies that a low proportion of residents within the Borough currently visit health and fitness facilities. As with Cinema visits, whilst there may be numerous reasons for this, it is considered likely that as a result of a new accessible and convenient health and fitness gym facility, a proportion of these residents may decide to visit the new health and fitness gym facility. New gym memberships are also expected to be derived from new dwellings in the planned Brookfield scheme and existing and new employees in the area. Some 1,500 new dwellings are planned for Brookfield together with employment, community and retail uses. Accordingly, such new members would not result in any customer diversion from existing health and fitness facilities within the surrounding area.

6.3.6 With the exception of Fit4Less gym in Hoddesdon Town Centre, it is noted that all existing health and fitness gym facilities in the Borough are located outside defined centres. Accordingly, any potential diversion of customers from those existing gym facilities in the Borough would not result in any adverse impact on the existing centres of Waltham Cross and Cheshunt. In terms of the Fit4Less gym in Hoddesdon Town Centre, having regard to its size and specific catchment (Hoddesdon residents and town centre workers) it is not considered to be materially harmed by the planned health and fitness gym facility in Brookfield.

6.3.7 Finally, in terms of existing gym facilities in centres outside Broxbourne, due to their distance from Brookfield, over 10 minutes drivetime, and the different catchments those facilities are seeking to serve, we consider that no adverse impacts on any defined centre are likely to arise as a result of a new gym facility at Brookfield.

6.4 Planned A3, A4 & A5 Food & Drink Uses

6.4.1 Brookfield is planned to provide up to 4,000sq m net 'food and drink' uses comprising of mix of restaurants, fast food/coffee outlets and bars.

6.4.2 We understand that the planned 'food and drink' uses will be concentrated around the New River between and amongst the main retail, leisure and civic uses. They are planned to complement the wider commercial mix of uses and to provide a new eating/drinking experience for the borough.

6.4.3 The Retail and Leisure Study identifies that eating and drinking out of the home still remains one of the most popular leisure activities which people carry out on a monthly basis. The study reported that 67% of people eat out at restaurants and 46% visit pubs/bars. As such, it is clear that a significant proportion of the surrounding population visit food and drink facilities on a regular basis. It is also widely acknowledged that people make choices on eating and drinking facilities which are located close to their place of residence/ work or as part of a linked trip.

6.4.4 The Retail and Leisure Study also identifies that currently some 63% of residents within the Borough are currently visiting restaurant facilities outside the Borough whilst some 43% are also visiting bars/pubs/nightclubs outside the Borough.

6.4.5 Over the plan period food and drink expenditure is expected to grow significantly. Experian forecast that UK per capita food and drink (restaurants, cafes) expenditure will increase from £1,134 per annum at 2015 to £1,332 per annum by 2030. Applying this expenditure per capita figure to the current and forecast Borough population (Zones 1-4 of the Retail & Leisure Study) it is anticipated that food and drink expenditure within the Borough could increase by £30.7m within the plan period (from £109.3m at 2015 to £140.0m by 2030). <u>The significant increase in food and drink expenditure within the Borough will have a mitigating effect on any potential impact on food and drink uses within defined centres within and outside the Borough</u>.

6.4.6 The proposed food and drink uses at Brookfield are intended to:

- introduce a step change in the quality of the food and drink offer in the borough;
- widen the choice of food and drink offer in the borough;
- assist in recapturing a proportion of the food and drink expenditure currently leaking to larger centres outside the Borough (and in turn encourage more sustainable travel patterns); and
- assist in addressing the needs of forecast growth in food and drink expenditure.

6.4.7 The proposed food and drink uses will also, in part, serve the existing and planned houses in Brookfield and people working in existing and planned employment facilities in Brookfield.

<u>Waltham Cross & Hoddesdon Town Centres</u>

6.4.8 Waltham Cross Town Centre includes a reasonable range of food and drink uses for its size. The centre contains 10 restaurant/ cafe (A3 use class) facilities comprising around 1,160sq m gross floorspace (January 2015). There are also 9 fast food and takeaway outlets (A5 use class) occupying around 1,160 sq m gross floorspace and 4 pubs/nightclubs/drinking establishments (A4 use class) within the centre. All of the restaurants and cafes are independent occupiers and no national chains were present. In terms of take-away and drinking establishments, there are two national retailers: KFC takeaway and JD Wetherspoon. The remaining facilities are predominantly independent occupiers.

6.4.9 It is evident that the town centre contains a good balance of day and evening eatery facilities and, as identified within the Retail and Leisure Study, the southern stretch of the High Street in particular benefited from steady pedestrian traffic throughout the day and into the evening as a result of its food, drink and service offer. The food and drink sector in the town centre was monitored to be trading healthily.

6.4.10 All of the restaurants and cafes at the time of our latest survey (January 2015) were independent occupiers and no national chains were present. In terms of take-away and drinking establishments, two national retailers were present, KFC takeaway and Moon and Cross public house operated by JD Wetherspoon. The remaining facilities are predominantly independent occupiers.

6.4.11 Hoddesdon Town Centre has a strong service offer (January 2015) which, as noted in the Retail and Leisure Study, has increased over the period 2011 to 2015. A significant proportion of the service uses are restaurant/ cafe/ take away uses. More specifically the town centre contains 17 restaurant/ cafes (A3 uses class) in January 2015 consisting of some 1,600sq m gross floorspace. Takeaway facilities (A5 use class) operate from 11 premises and occupy around 920sq m gross floorspace. There are also 7 public houses/ drinking establishments (A4 use class) located in the town centre.

6.4.12 The eating and drinking establishments within the town centre are predominantly independent operators, with the exception of two Costa Coffee's and Cafe Nero A3 units and Dominos Pizza, Pizza Hut Delivery, KFC and 'Wok U Like' A5 units. With 35 food and drink establishments in total the centre is considered to have a reasonably healthy range of facilities to the benefit of the local population.

6.4.13 The planned food and drink uses at Brookfield are unlikely to materially harm the trading position of the food and drink uses within either Waltham Cross or Hoddesdon town centres.

- The existing food and drink uses in both town centres were monitored to be trading healthily/well;
- In contrast to the food and drink proposed at Brookfield (which are intended to provide a step change in quality and choice of food and drink uses for the Borough) the existing food and drink provision in the town centres primarily provide for a more localised catchment; and
- The proposed food and drink uses are not considered to adversely impact on any investment in the town centres should any come forward (including the potential residential led Northern High Street Opportunity Zone in Waltham Cross Town Centre).

6.4.14 Furthermore, as noted previously at paragraph 6.4.5, as with retail, food and drink expenditure within the Borough is forecast to significantly increase in the forthcoming years. This expenditure growth will have a mitigating effect on any potential impact on food and drink uses within the two town centres.

Cheshunt Old Pond District Centre

6.4.15 Cheshunt Old Pond District Centre provides 18 restaurants, takeaway and pub facilities (January 2015). This consists of 8 restaurant and cafes (A3 use class) of around 1,070sq m gross floorspace, 7 takeaway units (A5 use class) comprising 840sq m gross floorspace and 3 drinking establishments. The restaurants and cafes in the centre are predominantly independently run and only one of the five takeaway outlets is operated by a national chain (Pizza Hut Delivery).

6.4.16 It is considered that no significant adverse impact are likely to rise as a result of the planned food and drink uses at Brookfield:

- The food and drink uses in the centre were observed to be trading reasonably well at the time of our visits;
- In line with its lower order role and function in the centre/shopping hierarchy the independent food and drink facilities in the district centre primarily serve the centres immediate walk in residential population. New food and drink uses in Brookfield are unlikely to draw a significant proportion of the walk-in catchment of Cheshunt Old Pond District Centre;
- The introduction of the planned step change in the quality of a food and drink offer in Brookfield, which is likely to primarily comprise of national multiple occupiers, is unlikely to result in existing independent food and drink uses in the district centre relocating to Brookfield; and
- There are currently no investment plans within the centre which could be materially impacted on.

Centres Outside of the Borough

6.4.17 Turning to the potential impact on existing food and drink facilities in centres outside the Borough. Having regard to the strength and catchment of food and drink uses in the nearest centres outside the Borough and in the absence of any significant adverse impacts on investment or the retail turnover of centres, no significant adverse impacts are considered to arise and the role of these centres are unlikely to be materially harmed.

7.0 Overall Impact on Centre Vitality & Viability

7.1 Introduction

7.1.1 Taken as a whole, consideration of the effects on in-centre existing, committed and planned investment and impact on centre turnover provide a good indication of the overall effects of a development on the vitality and viability of centres.

7.1.2 In assessing whether the planned Brookfield development results in a 'significant adverse impact' on the vitality and viability of centres within Broxbourne we have had regard to health check assessments previously undertaken by WYG for the July 2015 Broxbourne Retail & Leisure Study. In terms of centres outside the administrative boundary we have had regard to the most recent health check assessments undertaken on behalf of relevant neighbouring authorities. As part of this commission we have not been requested to update any vitality and viability health check assessments.

7.2 Impact on Vitality & Viability of Centres within Broxbourne

7.2.1 Both Waltham Cross and Hoddesdon town centres provide a range of convenience and comparison goods provision from both national multiple retailers and independent traders as well as providing an important service function. Cheshunt District Centre serves a more local role and has a more limited offer in terms of its convenience, comparison and service provision (both in floorspace and market share). The district centre offers a notable local service sector and a reasonable convenience goods provision.

Waltham Cross Town Centre

7.2.2 Waltham Cross Town Centre is the largest centre in Broxbourne. The town centre caters for the day-to-day retail and service needs of the population residing in the southern part of the Borough. In January 2015 the centre comprised of approximately 147 retail/service uses. The vitality and viability health check of the Town Centre undertaken as part of the Broxbourne Retail & Leisure Study found it to be generally vital and viable:

- the centre has a strong and varied mix of independent comparison retailers, a mix of convenience store offerings and is reasonably well represented in terms of service and community facilities;
- high levels of footfall were observed to the south of centre with more limited draw to the northern end of the High Street;
- whilst vacancies are notable to the north of the centre the overall proportion of units vacant has reduced in recent years and is below the national average;

- the environmental quality of the centre is mixed. The High Street is generally tidy, free from litter/graffiti, well maintained, legible, and vibrant. Vacancies detract from the environmental quality in the northern part of the centre; and

- the centre is considered accessible to a variety of modes of transport, albeit it was observed that the A121 is prone to congestion at peak times.

7.2.3 Having due regard to the latest health check findings for the centre and impact assessments in the preceding sections of this report it is assessed that the planned Brookfield development is unlikely to have a significant adverse impact on the vitality and viability or role of Waltham Town Centre:

- the latest health check of the centre shows that it is vital and viable and has improved in recent years with reducing vacancy levels;

- the planned Brookfield development is unlikely to materially harm the trading position of existing retail facilities in the centre. The level of retail trade/turnover assessed to be diverted is assessed to be low (-4.8% at 2024) and the retail turnover is assessed to continue to grow (+15.6% in the period 2016-2024);

- having regard to the role and function of the food and drink uses planned for Brookfield and the health of the existing food and drink in Waltham Cross Town Centre it is assessed that no adverse impacts will arise;

- in the absence of a multiplex cinema or health and fitness gym no material harm is considered to arise as a result of these elements of the planned development; and

- the planned development is not considered to delay or prejudice any potential investment or proposals, in particular the Northern High Street Opportunity Zone, in the centre.

Hoddesdon Town Centre

7.2.4 Hoddesdon is a traditional market town and is surrounded by several large foodstores on the outskirts of the town centre. The Broxbourne Retail & Leisure Study vitality and viability health check of the town centre found it to be vibrant. Of particular note:

- a healthy level of activity was observed during visits;

- the centre provides a good mix of local facilities and independent retailers and the larger foodstores encourage people to link trips;

- whilst there is no direct access via a train station it is well served by buses from surrounding residential areas and offers plenty of short stay parking opportunities;

- there are few leisure facilities attracting teens and young adults and more could be done to contribute to an evening economy;
- the centre has seen a reduction in vacancy levels (both floorspace and units). Although there are areas of vacancies in south of Morrisons vacancy levels were recorded to be below the national average;
- the perception of safety in the centre is generally high; and
- the increased effort to organise town centre events and markets has had a corresponding positive impact on footfall and vibrancy across the centre.

7.2.5 The health check assessed that the Town Centre has experienced significant improvements in its vitality and viability since the undertaking of the previous retail study.

7.2.6 Taking into account the latest health check findings for the centre and earlier impact assessments it is considered unlikely that the planned Brookfield development will have a significant adverse impact on the vitality and viability of Hoddesdon Town Centre:

- the latest health check of the centre demonstrates that it is vibrant and has experienced significant improvements;
- the planned Brookfield development is unlikely to materially harm the trading position of existing retail facilities in the centre. The assessed impact is low (-3.2% at 2024) and the centre is still anticipated to see an increase in retail turnover of +5.8% between 2016-2024;
- the planned cinema and gym element is not considered to materially harm the temporary and limited screening of films at the Spotlight theatre venue or the Fit4Less Gym;
- The planned food and drink uses are unlikely to materially harm the trading position of the food and drink uses within the town centre; and
- in the absence of any retail or leisure development commitments or plans in the town centre the retail and leisure floorspace planned for Brookfield is not considered to result in any adverse impacts on in-centre investment.

7.2.7 Overall it is assessed that the cumulative impact of the planned Brookfield development and commitments on the vitality and viability of Hoddesdon Town Centre is acceptable.

Cheshunt Old Pond District Centre

7.2.8 The latest vitality and viability health check of the District Centre (January 2015) identifies that the centre is in good health and performing well:

- The centre provides a large variety of services including restaurants/cafes, high street banks, estates agents and hairdressers;
- The centre benefits from a significant walk-in and drive-by trade;
- The centre is accessible by public transport albeit it was noted to be quite car-dependent;
- Vacancy levels are significantly below the national average; and
- In terms of environmental quality it was noted that there is scope for improvements to the general street environment as the majority of the shop frontages are somewhat dated which detracts from the overall aesthetics of the centre.

7.2.9 Having regard to the local and limited role of Cheshunt District Centre as a retail and leisure destination; the limited trading overlap and in turn the assessed level of trade diversion (-2.3% at 2024); the current health of the centre, and in the absence of any planned/committed investment, it is considered that the planned retail and leisure floorspace within Brookfield will not result in any significant adverse impact on the vitality and viability or role of the centre.

7.3 Impact on Vitality & Viability of Centres outside Broxbourne

Harlow Town Centre

7.3.1 The latest vitality and viability health check assessment undertaken on behalf of Harlow Council (Retail Study & Town Centre Health Check, July 2007) identified that Harlow Town Centre was relatively healthy and performing well:

- it has an above average representation of comparison goods and multiple retailers benchmarked against the national averages;
- its offer has been enhanced by the opening of The Water Gardens;
- the town benefits from good transport links; and
- the majority of the town centre is pedestrianised.

7.3.2 However, the assessment suggested that there were a number of 'gaps'/weaknesses which should be addressed in order for the centre to fulfil its sub-regional role. The weaknesses include: a limited eating out and drinking offer; a relatively poor choice of other commercial leisure uses; a high vacancy rate; a weak department store offer; and below average provision of higher-order fashion retailers benchmarked against competing centres in the region.

7.3.3 Since the health check planning permission has been granted for a new 6 screen cinema and a number of restaurants and cafe units within the Harvey Centre (application ref: HW/PL/12/00143). The development is due to open by the end of 2016 with pre-lets already secured for Cineworld, Prezzo, Tinseltown and Retail China. Furthermore, planning permission has also been granted at the former M&S Unit for a mixed use development comprising five A1/A3 units, two A3 units and one D2 gym unit (application ref: HW/PL/16/00004). The development is also due to open by the end of 2016 with pre-lets already secured for Nationwide, F Hinds and Xercise4Less.

7.3.4 It is assessed, having due regard to the latest health check findings for the centre and impact assessments in the preceding sections of this report, that the planned Brookfield development will not have a significant adverse impact on the vitality and viability or role of Harlow Town Centre:

- the Council's latest health check of the centre shows that it is performing well and that it is relatively healthy;
- the trading position of existing retail facilities in the town centre is unlikely to be materially harmed as a result of the planned retail and leisure floorspace within Brookfield. The level of retail trade/turnover assessed to be diverted is assessed to be low (-5.2% at 2024) and the retail turnover is assessed to continue to grow significantly (+41.0% in the period 2016-2024);
- significant investment is currently being implemented in the town centre which includes a new cinema and restaurant uses. In light of the stage in which investment schemes have reached, and the pre-lets already secured (including Cineworld, Prezzo and Real China), the planned retail and leisure development at Brookfield is highly unlikely to prejudice, delay or impact upon this investment being completed; and
- due to the role, nature and limited catchment of the planned gym facility there will be no materially or adverse harm to any existing gym facilities within the Town Centre.

Enfield Town Centre

7.3.5 The most recent health check undertaken on behalf of the London Borough of Enfield for Enfield Town Centre (A Study of Town Centres, March 2007) identifies a number of strengths and weaknesses with the centre including:

- a reasonably large range and choice of national and independent shops;
- the provision of a good range of service facilities;
- low pedestrian levels towards the peripheral areas of the centre;
- a very low (3.6%) vacancy rate;
- a proportion of convenience retailers which is lower than the national average;
- prime retail yields that broadly reflect the centre's position in the shopping hierarchy;
- a limited supply of premises available to accommodate new operators;
- a reasonably pleasant shopping environment albeit limited pedestrianised sections; and
- good accessibility by public transport.

7.3.6 Generally, having regard to the health check, it is considered that Enfield Town Centre displays good levels of vitality and viability.

7.3.7 Taking into account the above health check findings and our earlier impact assessments it is assessed that the planned Brookfield development is highly unlikely to have a significant adverse impact on the vitality and viability or role of Enfield Town Centre:

- the Council's latest health check concludes that the centre displays goods levels of vitality and viability;
- the planned Brookfield development is unlikely to materially harm the trading position of existing retail facilities in the centre. The assessed impact is low (-5.6% at 2024) and the centre is still anticipated to see a significant increase in retail turnover of +31.2% between 2016-2024;
- in the absence of a multiplex cinema in the centre no material harm is considered to arise as a result of this element of the planned development;
- due to the role, nature and limited catchment of both the planned gym facility and food and drink uses there will be no adverse harm to any existing gym facilities or restaurants and bars within the Town Centre; and
- The planned retail and leisure floorspace would not delay or prejudice any planned or committed investment within the town centre, in particular the Town Centre Station Area Site, should it come forward.

Welwyn Garden City Town Centre

7.3.8 The latest Welwyn Hatfield Borough Council commissioned health check for Welwyn Garden City Town Centre is contained in the 2016 Welwyn Hatfield Retail and Town Centre Needs Assessment Update. The vitality and viability assessment found that:

- The centre has a strong representation of high street comparison retailers including John Lewis and Debenhams;
- The proportion of units vacant in the centre is below the national average;
- The centre is well represented in terms of service facilities;
- A3 restaurant/leisure provision is below the national average;
- The town centre is of the highest environmental quality; and
- The structure of the Town Centre encourages footfall across the entire town.

Accordingly, the town centre is considered to display very good levels of vitality and viability.

7.3.9 Having regard to the preceding assessments of impact in this report it is assessed that the planned Brookfield development will not have a significant adverse impact on the vitality and viability or role of Welwyn Garden City Town Centre. This is primarily due to the following reasons:

- the trading position of existing retail facilities in the centre is unlikely to be materially harmed. The level of retail trade/turnover assessed to be diverted is assessed to be low (-4.2% at 2024) and the retail turnover is assessed to continue to grow (+15.6% in the period 2016-2024);
- the centre demonstrates very good levels of vitality and viability;
- in the absence of a multiplex cinema in the centre no material harm is considered to arise as a result of this element of the planned development;
- due to the role, nature and limited catchment of the planned gym and food and drink facilities there will be no adverse harm to any existing gym or food and drink facilities; and
- the planned development is not considered to delay or prejudice any planned or committed investment proposals within the Town Centre.

Hertford Town Centre

7.3.10 The East Herts Council Retail and Town Centre Study Update, November 2013, provides the latest vitality and viability health check undertaken on behalf of the Council for Hertford Town Centre. The health check concluded that:

- the proportion of vacant units is broadly comparable to the national average;
- the Centre provides a reasonable range and mix of national and independent retailers;
- the Centre has a good range and choice of non-retail services;
- Market stalls in Salisbury Square and Market Place and outdoor cafe seating areas in Parliament Square create a lively street scene; and
- overall the shopping environment is well maintained and pleasant although the street environment along Maidenhead Street lacks interest;

It is therefore considered that Hertford Town Centre displays good levels of vitality and viability.

7.3.11 It is assessed that the planned retail and leisure floorspace within Brookfield will not result in a significant adverse impact on the vitality and viability or the role of Hertford Town Centre:

- the vitality and viability of the centre is considered to be good;
- the level of retail trade/turnover assessed to be diverted is assessed to be low (-3.8% at 2024) and the retail turnover is assessed to continue to grow (+13.5% in the period 2016-2024). Accordingly, the trading position of existing retail facilities in the centre will not be materially harmed.
- in the absence of a multiplex cinema in the town centre no material harm is considered to arise as a result of this element of the planned development and due to the role, nature and limited catchment of the planned gym facility there will be no materially or adverse harm to any existing gym facilities;
- due to the role, nature and limited catchment of the planned food and drink facilities there will be no adverse harm to any existing food and drink facilities; and
- the retail and leisure floorspace planned for Brookfield will not result in any adverse impacts on in-centre investment.

Hatfield Town Centre

7.3.12 The health check assessment of Hatfield Town Centre contained in the 2016 Welwyn Hatfield Borough Council Retail and Town Centre Needs Assessment Update found that:

- the centre provides a large Asda foodstore which attracts visitors to the centre and enhances footfall;
- the Town Centre has a generally good standard of public realm with The Arcade currently undergoing renovation;
- the comparison goods retailer and A3 leisure offer requires improvements;
- there is a good level layout of car parking provision within the centre;
- the nearby Galleria out-of-centre shopping centre offers a good mix of comparison and leisure uses which attracts visitors away from the town centre;
- there is high quality public planting in some areas which enhances the attractiveness of public open spaces in the town centre;
- investment is still required across the Town Centre to improve the public realm and retail frontages, particularly its periphery; and
- the centre is compact and pedestrianised throughout, creating an attractive environment for pedestrians.

7.3.13 Accordingly, the vitality and viability of the Town Centre is considered to be reasonable.

7.3.14 Overall, having regard to, *inter alia*, the distance of Hatfield from Brookfield; the assessed level of trade diversion (-1.6% at 2024); the continued increase in retail turnover of the centre (+25.7% between 2016-2024); the current health of the centre; and in the absence of any significant adverse impact on in-centre investment and on existing leisure facilities, it is assessed that the planned retail and leisure floorspace within Brookfield will not result in a significant adverse impact on the vitality and viability or role of Hatfield Town Centre.

Stevenage Town Centre

7.3.15 The Stevenage Borough Council Revised Stevenage Retail Study (October 2014) provides the latest vitality and viability health check for Stevenage Town Centre. The health check found that the centre was *"quite healthy"*. Of particular note it assessed:

- the convenience and comparison goods sectors are well represented;
- there are a number of cafes and restaurants in the centre but restaurant/bars are limited;
- trends in prime retail rental levels and retail investment yields in the centre are comparable to the national trend;
- the town centre requires some rejuvenation and recognition that the public realm and shopping environment is not aligned to modern day shoppers; and
- the number of vacant units and amount of vacant floorspace has decreased in recent years. The vacancy level is low and below the national average.

7.3.16 It is assessed that the planned retail and leisure floorspace within Brookfield will not result in a significant adverse impact on the vitality and viability or role of Stevenage Town Centre. This conclusion is made having due regard to, *inter alia*: (1) the location of Stevenage Town Centre relative to Brookfield; (2) the limited assessed level of trade diversion (-1.6% at 2024); (3) the continued increase in retail turnover of the centre between 2016-2024 (+19.9%); (4) the current health of the centre; and (5) the lack of any adverse impact on in-centre investment and on existing leisure facilities.

Ware Town Centre

7.3.17 The East Herts Council Retail and Town Centre Study Update, November 2013, provides the latest vitality and viability health check undertaken on behalf of the Council for Ware Town Centre. The health check identifies that:

- the centre has a mix of shops and services that meet day to day and local shopping needs;
- the shopping environment is generally well maintained and attractive, in particular the small historic streets;
- the provision of leisure and entertainment facilities, other than restaurants and pubs, is limited; and
- the centre contains a vacancy level which is below the UK average.

7.3.18 Overall, having regard to the health check, it is considered that Ware Town Centre displays good levels of vitality and viability.

7.3.19 It is assessed that the planned retail and leisure floorspace within Brookfield will not result in a significant adverse impact on the vitality and viability or the role of Ware Town Centre:

- the town centre displays good levels of vitality and viability;

- the level of retail trade/turnover assessed to be diverted is assessed to be low (-2.3% at 2024) and the retail turnover is assessed to continue to grow (+13.8% in the period 2016-2024). Accordingly, the trading position of existing retail facilities in the centre will not be materially harmed.
- in the absence of a multiplex cinema in the town centre no material harm is considered to arise as a result of this element of the planned development and due to the role, nature and limited catchment of the planned gym facility there will be no materially or adverse harm to any existing gym facilities;
- due to the role, nature and limited catchment of the planned food and drink facilities there will be no adverse harm to any existing food and drink facilities; and
- the retail and leisure floorspace planned for Brookfield will not result in any adverse impact on in-centre investment or on existing leisure facilities.

8.0 Impact of the Redevelopment of the Northern High Street Opportunity Zone on Waltham Cross Town Centre

8.1 Introduction

8.1.1 In the 2015 Broxbourne Retail & Leisure Study we recommended that the Council continued its efforts to bring forward the development of the Northern High Street Opportunity Zone in accordance with its Town Centre strategy.

8.1.2 In this section of the report we provide initial advice in relation to the potential impact of the redevelopment of the Northern High Street Opportunity Zone on Waltham Cross Town Centre.

8.2 The Northern High Street Zone

8.2.1 The Northern High Street Zone/Site measures approximately 2.3ha. It currently comprises the following:

- Wickes DIY store and adjacent surface level car park;
- Homebase DIY and Garden Centre store and adjacent surface level car park;
- 16 shops/services located in the High Street including:
    - 2 clothing shops;
    - 2 charity shops;
    - 3 health and beauty outlets/hair salons;
    - a cafe;
    - a dental surgery; and
    - a Wellbing Centre

8.2.2 The site is currently split into two parts by Sturlas Way with the Homebase store and adjacent car park forming one part and the Wickes, it's adjacent surface level car park and shops/services facing onto High Street forming the other part.

8.2.3 The site is bounded by Monarchs Way and The Pavilions Shopping Centre to the east; Winston Churchill Way to the north; town centre retail and service units to the south; and residential properties to the west.

8.2.4 A copy of a plan showing the extent and location of the site is attached at **Appendix F**.

8.3 Potential Redevelopment Scheme

8.3.1 As noted in Section 5 Broxbourne Borough Council had been planning a retail led development on this site anchored by a foodstore and prospective relocations from elsewhere within the centre. However, after engaging with retailers it became apparent that the location and configuration of the site did not fit with town centre retailer requirements.

8.3.2 The Council latest plans/aspirations for the redevelopment of the site are for a residential led development with ground floor replacement commercial units fronting onto the High Street.

8.3.3 A scheme is currently being formulised by the Council for the site which we understand is likely to include:

- 300+ residential units/apartments;
- Up to 1,500sq m gross B1 office floorspace; and
- Up to 2,500sq m gross A1/A3 retail floorspace.

8.3.4 Planning officers have indicated that the total potential B1/A1/A3 commercial floorspace on the site would not exceed 4,000sq m. The majority of this floorspace is likely to be re-occupied by existing retailers/businesses already on the site.

8.3.5 The redevelopment of the site will require the relocation of bulky goods retail warehouse retailers Wickes and Homebase. We understand that there could be potential to relocate the retailers to the Park Plaza North site to the south east of the A10/A121 roundabout.

8.4 Potential Impact on Waltham Cross Town Centre

8.4.1 The existing Wickes and Homebase stores currently turn their back on the town centre and, having regard to our on-site observations, are not currently encouraging linked shopping trips with other parts of Waltham Cross Town Centre.

8.4.2 Having regard to the lack of relationship/linked trips between the retail warehouses and the remainder of the Town Centre their potential relocation to Park Plaza provides an opportunity for the site to bring about a positive impact/benefit to the centre.

8.4.3 It is considered that a residential led redevelopment of the site together with new modern replacement A1/A3 and B1 units/floorspace at ground floor has the potential to bring about the positive impacts/benefits to Waltham Cross Town Centre:

- Increased Pedestrian Footfall/Activity

  The redevelopment of the site for 300+ residential units and new commercial units would assist in increasing pedestrian footfall/activity and improve the draw to the northern end of the High Street.

- New Modern Ground Floor Commercial Frontage & Environmental Improvements

  The shop fronts and environment in the northern end of the High Street would benefit from improvement. The provision of new modern shop fronts together with public realm improvements would enhance the appearance and environmental quality of the northern end of the High Street.

- Reduced Vacancy Levels

  Whilst the vacancy rate in the town centre is low there are a number of vacant units in the northern part of the centre. The provision of new improved modern units and enhanced environment would result in the units being more marketable and better suited to retailer/occupier requirements.

- An enhanced Town Centre Evening Economy

  The improved units, which have the potential to be re-occupied by A3 units, and the additional 300+ residential units, could assist in enhancing the town centres evening economy and more generally assist in increasing spend in the town centre.

8.4.4 Accordingly, it is considered that the potential residential led redevelopment of this site and the relocation of Wickes and Homebase provides a real opportunity to enhance the vitality and viability of Waltham Cross Town Centre.

9.0 Conclusions/Recommendations

9.1 Introduction

9.1.1 This study provides an appraisal of the impact of the retail and leisure element of the planned Brookfield development. The Study will support the emerging Broxbourne Local Plan 2016-2031.

9.1.2 A key purpose of this Study is to provide an impact assessment of the planned retail and leisure development at Brookfield on relevant defined centres within and outside the administrative area of Broxbourne.

9.1.3 The Study follows the Broxbourne Retail & Leisure Study (and Study Addendum) which concluded that, subject to compliance with an assessment of impact, Brookfield (and the Greater Brookfield area) was considered the sequentially preferable location to accommodate any residual large scale retail and leisure development within the Borough.

9.2 The Planned Brookfield Development

9.2.1 The planned retail and leisure floorspace in Brookfield forms parts of the Council's comprehensive Brookfield Riverside proposals which includes:

- 1,500 new homes (a mix of low, medium and high density);
- Up to 47,000sq m office and civic floorspace (including Borough Council offices);
- Mixed use 'town centre' development comprising:
    - ➢ Up to 35,000sq m net retail floorspace (A1, A3, A4 and A5 Use Class), of which:
        - - Up to 28,000sq m net is for A1 comparison goods retail floorspace
        - - Up to 3,000sq m net is for A1 convenience goods retail floorspace
        - - Up to 4,000sq m net is for A3, A4 and A5 food and drink floorspace.
    - ➢ Up to 10,000sq m of leisure floorspace including a cinema and health and fitness club;
    - ➢ Community facilities;
    - ➢ Hotel; and
    - ➢ Public transport hub.
- Education facilities/schools;
- Elderly persons accommodation;
- Open space, landscaping and allotments (relocated); and
- Road and public utility infrastructure.

9.3 NPPF Impact Test Policy Requirements

9.3.1 The NPPG (paragraph 14) provides guidance on how the impact test should be used in plan making. It notes that if the Local Plan is based on meeting the assessed need for town centre uses in accordance with the sequential approach, issues of adverse impact should not arise. It goes on to state that the impact test may be useful in determining whether proposals in certain locations would impact on existing, committed and planned public and private investment, or on the role of centres.

9.3.2 Whilst impact test requirements set out in paragraph 26 of the NPPF pertains to planning application proposals for main town centre uses that are not in a centre and not in accordance with an up to date development plan, in this instance, in accordance with our commission, we have adopted them to assess the potential impact of the planned Brookfield development.

9.3.3 Paragraph 26 of the NPPF identifies that proposals for town centre uses should be assessed in terms of the following impacts on centres:

- The impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
- The impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area.

9.3.4 The NPPF advises that a proposal should not be allowed where it is likely to have a significant adverse impact on one or more of the above factors.

9.4 Impact on In-Centre Investment

Centres within Borough

9.4.1 Our assessment of the potential impact of the planned retail and leisure floorspace on investment in centres within the Borough identifies that no significant adverse impact will arise. With the exception of environmental/public realm improvements there are currently no investments plans (committed or proposed) in Hoddesdon Town Centre of Cheshunt District Centre. In terms of Waltham Cross Town Centre, whilst the North High Street Opportunity Zone is identified as a potential investment opportunity, the Council’s current plans are for a residential led apartment development with limited ground floor commercial uses. The economic viability of the redevelopment is likely to be anchored by the residential elements rather than the commercial floorspace. This investment is very unlikely to be delayed or prejudiced as a result of the planned retail and leisure floorspace at Brookfield.

Centres Outside Borough

9.4.2 Our assessment of the potential impact on investment in centres outside the Borough has been informed by discussions/correspondence with planning policy officers in neighbouring authorities. The centres that have been assessed include: Harlow Town Centre (approximately 19 minutes drivetime from Brookfield); Enfield Town Centre (approximately 23 minutes drivetime); Welwyn Garden City Town Centre (approximately 26 minutes drivetime); Hatfield Town Centre (approximately 24 minutes drivetime); Hertford Town Centre (approximately 16 minutes drivetime); Stevenage Town Centre (approximately 30 minutes drivetime) and Ware Town Centre (approximately 14 minutes drivetime). Our assessment identifies that it is unlikely that the planned retail and leisure floorspace at Brookfield would result in any significant adverse impact on any investment in these centres.

9.5 Impact on Town Centre Vitality & Viability

Centres within Borough

9.5.1 Having due regard to the detailed impact assessment within this Study we consider that it is unlikely that the planned floorspace would result in a significant adverse impact on the vitality and viability of any defined centres within the Borough:

- <u>Waltham Cross Town Centre</u> - the centre is generally vital and viable and has improved in recent years, the levels of trade diversion are assessed to be low (-4.8%); the retail turnover is assessed to increase (+15.6% (£16.8m) between 2016-2024); investment in the centre will not be materially harmed/prejudiced, and; no material harm is considered to arise as a result of the leisure element of the planned development.

- <u>Hoddesdon Town Centre</u> - the trading position of existing retail facilities in the centre will not be materially harmed (-3.2% impact at 2024); the retail turnover is assessed to increase (+5.8% (£7.4m) between 2016-2024); the centre is considered to be vibrant with its vitality and viability significantly improved over recent years; there are currently no planned/committed investments to impact upon, and; the leisure elements of the centre will be materially harmed.

- <u>Cheshunt District Centre</u> - the centre has a local and limited role as a retail and leisure destination; there is limited trading overlap; the assessed level of trade diversion is assessed to be low (-2.3%); the centre retail turnover is assessed to increase (+17.3% (£7.6m) between 2016-2024); the current health of the centre is good, and; there are currently no planned/committed investments to impact upon.

Centres Outside Borough

9.5.2 This study also considers the potential impact of the planned retail and leisure floorspace in Brookfield on the vitality and viability of relevant defined centres outside the Borough. It is our judgement, having regard to the detailed impact assessment, that no significant adverse impact arise:

- Harlow Town Centre - the centre is strong, performing well and is healthy; the level of impact is assessed to be low (-5.2%); the centre's retail turnover is assessed to grow significantly (41.0% (£146.9m) between 2016-2024); the significant investment currently being developed will not be prejudiced, and; no material harm is considered to arise as a result of the leisure element of the planned development.

- Enfield Town Centre - the centre displays good levels of vitality and viability; the trading position of existing retail facilities in the centre will not be materially harmed (-5.6% impact at 2024); the retail turnover of the centre is assessed to increase substantially (31.2% (£66.0m) between 2016-2024); planned/committed development, including the Town Centre Station Area Site, will not be materially harmed; and in the absence of a multiplex cinema and due to the different catchment of gym and food and drink facilities in the centre no adverse impact is assessed to arise on these facilities.

- Welwyn Garden City Town Centre – the centre is considered to provide a healthy and strong retail provision and demonstrates very good levels of vitality and viability; the impact on the centre is assessed to be low (-4.2%) with retail turnover still expected to increase (15.6% (£45.9m) between 2016-2024); planned/committed investment will not be adversely impacted upon, and; again in the absence of a multiplex cinema and due to the different catchment of gym and food and drink facilities in the centre, no adverse impact is assessed to arise on these facilities;

9.5.3 In terms of other relevant centres outside the Borough (Hertford, Hatfield, Stevenage and Ware town centres) having regard to: (1) the level of trading overlap; (2) the assessed level of impacts (3.8%, 1.6%, 1.6% and 2.3% respectively); (3) the growth in retail expenditure within the centres after the planned retail and leisure floorspace; (4) the vitality and viability of the centres; and (5) in the absence of any significant adverse impact on planned/committed investment no significant adverse impacts are assessed on the vitality and viability of each centre.

9.5.4 Accordingly, taking into account the foregoing assessment we do not consider that the planned retail and leisure floorspace within Brookfield is likely to result in any significant adverse impacts on the vitality and viability of any defined centre within or outside the Borough or materially harm their role.

9.6 Impact of the Redevelopment of the Northern High Street Opportunity Zone

9.6.1 The existing Wickes and Homebase stores on the Northern High Street Opportunity Area currently turn their back on the town centre and are not currently encouraging linked shopping trips with other parts of Waltham Cross Town Centre.

9.6.2 We consider that the potential planned residential led redevelopment of the Northern High Street Opportunity Area in Waltham Cross Town Centre provides a real opportunity to enhance the vitality and viability of Waltham Cross Town Centre. It is considered that its redevelopment is likely to provide a number of positive impacts/benefits to Waltham Cross Town Centre including: increased Pedestrian Footfall/Activity in the town centre; the provision of new Modern Ground Floor Commercial Frontage & Environmental Improvements; reduced vacancy levels; and an enhanced Town Centre Evening Economy.

9.7 Overall Conclusions/Recommendations

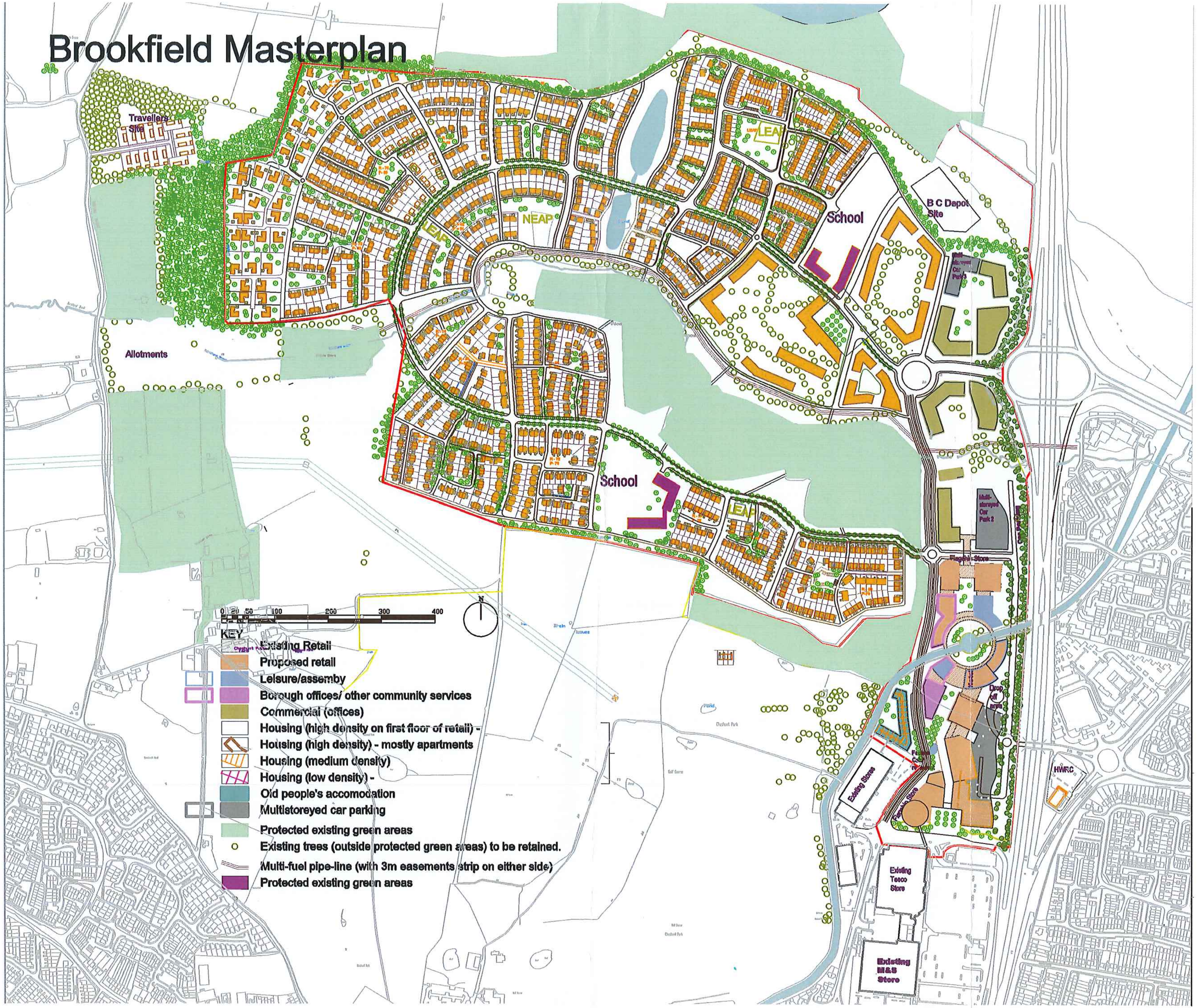
9.7.1 The Council has previously progressed plans for retail and leisure floorspace at Brookfield in its earlier Core Strategy. The Core Strategy planned Brookfield scheme included, *inter alia*, 35,000sq m net comparison goods floorspace and 15,000sq m gross of leisure floorspace. The Inspector, in examining the document, concluded that the critical mass and the amount of planned retail floorspace were not fully justified or consistent with government policy.

9.7.2 The Council are now seeking to progress a reduced level of retail (-7,000sq m net) and leisure floorspace (-5,000sq m net) at Brookfield. The planned Brookfield development, in addition to meeting the retail and leisure needs identified in the Retail & Leisure Study, is intended to help recapture some of the identified retail and leisure expenditure currently 'leaking' to retail and leisure facilities outside the Borough and to reduce the current unsustainable shopping and leisure travel patterns.

9.7.3 This Study provides an impact assessment of the planned reduced level of retail and leisure development at Brookfield on relevant defined centres within and outside the administrative area of Broxbourne. Having due regard to the impact assessment we consider that no significant adverse impacts will arise on in-centre investment or the vitality and viability of any of the assessed defined centres within or outside the Borough.

Appendix A
Brookfield Riverside Draft Masterplan

Brookfield Masterplan



Appendix B
Summary of Stakeholder Engagement

Appendix B:

Brookfield Retail & Leisure Impact Assessment - Key stakeholder engagement

A draft of the study was issued to the following authorities for comment (email of 6 October 2016), together with an invitation to a presentation by Broxbourne Council and WYG consultants followed by a round table-discussion of the contents of the draft study. The event took place on Thursday 3 November 2016. Attendees are listed in the table below.

Local Planning Authority Name	Officer Representative
East Herts District Council	Jenny Pierce
Enfield Council	Hassan Ahmed, Askhan Liaghat
Epping Forest District Council	Amanda Thorn
Harlow District Council	Sophie Leaning
Stevenage Borough Council	Deborah Horner
Welwyn Hatfield Borough Council	Rob Webster

Authorities were given a further period for comment in writing following the event. Written responses were received from all six. Comments received from each authority, together with responses from Broxbourne Council/WYG to each point raised, are contained in Table 1 below.

Harlow Council requested a follow-up meeting, which was attended by representatives of Harlow Council and their Retail Consultants, GVA Grimley, as well as WYG, on Friday 25 November.

The following organisations were consulted by email (dated 23 November) on a draft of the Brookfield Retail and Leisure Impact Study:

- Waltham Cross and Cheshunt Chamber of Commerce
- Hoddesdon Business Forum
- Love Hoddesdon
- Bunnings-Homebase
- Wickes Building Supplies Limited
- Harvey Family
- Sainsbury's Supermarkets Ltd
- Tesco
- Marks & Spencer PLC
- John Lewis
- Bayfordbury Estates
- JP Morgan (Brookfield Property Unit Trusts)
- Fishpools

The Council is in ongoing discussions with a number of these parties in response to representations received.

BORUGH OF BROXBOURNE COUNCIL
BROOKFIELD RETAIL & LEISURE IMPACT STUDY
NEIGHBOURING PLANNING AUTHORITY COMMENTS AND WYG/BOROUGH OF BROXBOURNE RESPONSE

No.	Council	Comments	Response
1	East Herts Council	Requirement for a map showing the study area and survey zones.	The study area and survey zones are provided in the Broxbourne Retail & Leisure Study – July 2015.
2	East Herts Council	The survey zones bear no resemblance to the zones used in the East Herts retail study. Hertford and Ware are split between zones 10, 11 ad 12 despite them functioning as a single planning area. This makes it difficult to determine if the study draws upon the correct catchments for these towns. For example, within the East Herts study, Hertford (Zone 1) and Ware (Zone 2) and their environs spent £1.82m and £3.7m respectively at Brookfield in 2013. Yet no expenditure from your Zone 12 (which covers parts of Hertford and Ware) was directed back to Brookfield.	The survey zones reflect the zones used in the Broxbourne Retail & Leisure Study – July 2015. Figure 4.2 in the Brookfield Retail and Leisure Study – July 2016 identifies that Brookfield currently draws £13.5m (7%) of comparison goods expenditure from Zone 12. For convenience goods no expenditure is drawn from Zone 12 to Brookfield. Figure 4.3 in the Brookfield Retail and Leisure Study – July 2016 identifies that the planned Brookfield comparison goods floorspace could draw between £8.8m to £11.7m from Zone 12 (depending on sales density of floorspace). In terms of convenience goods floorspace having regard to, *inter alia*, the existing foodstores in Brookfield not drawing any expenditure from Zone 12 we have assessed the proposed floorpsace in Brookfield will also not draw any expenditure from the zone.
3	East Herts Council	The study indicates that all impacts will be low, even on the centres nearest the Brookfield Centre. We assume this is because most of the impact that could occur already has. The majority of changes to these centres recently have been changes of use to restaurants with very little provision of convenience and comparison uses remaining. Some explanation around this would be helpful.	A full explanation of the levels of impacts both in qualitative and quantitative terms on centres within Broxbourne is provided in the Study. The latest health check and detailed review (including changes) of the centres in the Borough is provided in the Broxbourne Retail & Leisure Study – July 2015.

No.	Council	Comments	Response
4	East Herts Council	For the impact on East Herts, it would be appreciated if some dialogue could be included on Bishop's Stortford. Even though the links (travel time/ expenditure) are minimal, as our principal town centre, members and the public would expect it to at least be acknowledged in the study.	Having regard to the distance and limited trading/catchment overlap between Bishop's Stortford and the planned retail and leisure floorspace at Brookfield we do not consider an assessment of impact on Bisthop's Stortford is necessary.
5	East Herts Council	Ware is the nearest town centre and is not mentioned in the study. Ware is already struggling as a centre and is particularly vulnerable to competition due to constrained nature of the town.	An assessment of retail and leisure impact on this centre will be undertaken.
6	East Herts Council	The majority of healthchecks are out of date and therefore do not represent the latest picture. Acknowledging that it is not the remit of this study to update these healthchecks, a lot has happened over the last decade in retail trends that would not be captured using this older data.	The study utilises the latest town centre vitality and viability health checks which have been undertaken on behalf of neighbouring The health checks form part of the retail/leisure evidence local plan evidence base and either inform adopted or emerging plans.
7	East Herts Council	The wording of the study conclusions implies that because there will be a growth in retail expenditure in other towns and that any diversion of this trade is ok. What this assumes is that there is no change, including a decline in other centres. We know from the 2013 study and critical friend update, that centres are declining in general with a move from convenience and comparison floorspace to food and leisure. Assuming expenditure will increase based upon a forward projection of past trends may not therefore give an accurate picture as it assumes that each centre will retain the current market share. In East Herts there has been a reduction in the market share and an increase outwards to other centres. Based on this assumption, question whether the outlook for Hertford will be as healthy as assumed in the study?	The study provides two measures of quantitative retail impact (see para 4.2.1): - the change in turnover of centres in the period 2016-2024 following the development of the planned floorspace; and - the impact of the planned floorspace on the calculated 2024 turnover of centres. This is a standard and industry recognised approach to assessing quantitative retail impact and is in accordance with the NPPF.

No.	Council	Comments	Response
8	East Herts Council	On the assumption that like affects like and the proportion of trade draw based on the new centre will remain the same as the existing centre. If the number and range of retailers increases from the current range at Brookfield, one would assume that the attraction to it will also increase. If this results in the withdrawal and relocation of larger retailers from the constrained high streets of surrounding market towns to Brookfield centre, the trade draw of customers from existing centres to the new Brookfield would also increase. Therefore, we suggest a range of scenarios are tested to accommodate an increased market share of the new Brookfield compared to the current centre.	The level of retail trade assessed to be drawn from facilities/centres has regard to paragraph 17 of the NPPG. In order to provide sensitivity retail impact testing the study tests higher levels of trade draw/ impacts on surrounding existing centres, adopting a high sales density/turnover. The retail impact methodology and assumptions are in accordance with guidance in the NPPG.
9	East Herts Council	Section 4.3 of the Study refers to a scenario based on a greater floorspace but this does not take into account the likelihood of the relocation of retailers from neighbouring centres and still assumes an existing proportion of trade draw.	The scenarios provided in Section 4.3 are provided as part of a sensitivity impact exercise testing the previous Core Strategy planned comparison goods floorspace for Brookfield and the comparison goods floorspace capacity identified in the Retail Study Addendum. The quantitative retail impact assessment provides an orthodox assessment and, whilst not technically required for plan making (NPPG Para 14), is in accordance with the development management impact test and guidance set out in the NPPF and NPPG.
10	East Herts Council	The explanation provided at the presentation regarding the impact of future residential growth was not understood. Some explanation of how this has or has not been taken into account would be useful.	Population growth figures adopted in the Retail & Leisure Study are trend based figures provided by Experian.
11	Enfield	No comments provided to date as looking to conduct own retail impact study. This will primarily assess the impact of Brookfield on retail parks, district and local town centres and cinema.	Broxbourne Council would welcome the opportunity to comment on the draft study prior to publications. Mutual understanding of the methodology of such technical studies is important.

No.	Council	Comments	Response
12	Epping Forest District Council	No comments/ issues raised.	NA
13	Harlow Council	Exact floorspace numbers for retail seemed to differ between the document and what was discussed in the meeting on 03/11. Up to 35,000 sq m net retail floorspace and 10,000 sq m net of leisure floor are stated in the study. The figures quoted during the meeting were 28,000 sq m or 30,000 sq m for retail including the already committed expansion. Plus there was reference made to 3,000 sq m for convenience floorspace. Can we have clarification on the definitive floorspace?	The planned Brookfield scheme involves: o Up to 28,000sq m net comparison goods retail floorspace; o Up to 3,000sq m net convenience goods retail floorspace; and o Up to 10,000sq m gross leisure floorspace including a cinema (up to 6 screens), food and drink uses (A3, A4 and A5 (4,000sq m gross)) and health and fitness club. The 35,000sq m net retail floorspace figure quoted in paragraph 1.3.1 of the Brookfield Impact Assessment includes convenience and comparison goods floorspace and the A3, A4, A5 floorspace. The 35,000sq m floorspace figure will be split to provide better clarity. The Brookfield Retail Park Commitment = 1,957sq m net retail warehouse floorspace.
14	Harlow Council	Is the baseline data taken from the 2007 Health Check appropriate/ has it been amended now that some of the more up to date health-check information has been provided?	Health checks for centres outside Broxbourne are based on the most up to date retail/leisure evidence base document available from the relevant LPA.

No.	Council	Comments	Response
15	Harlow Council	The approach taken in this study in relation to Hertford was to consider the areas of opportunity as well as committed development. In contrast the Town Centre North area highlighted on the LP Policies Map for Harlow has not been considered- what was the rationale behind this and should it be included?	An identical email was sent to all relevant surrounding LPA's on the 25/04/16 (for Harlow it was Vicky Forgione). The email asked for confirmation on any in-centre existing, committed and planned investment within Harlow Town Centre. It also asked whether there was anything else that Council's considered we would need to be aware of in preparing this document. An email response was received from Harlow on the 03/05/16. The impact assessment has due regard to the response. Should there now be other planned/committed investment that potentially needs to be considered, if it is deemed necessary, we can take these into account in our impact assessment.
16	Harlow Council	There is no real consideration of the qualitative 'operator demand'. Harlow, for example, will be looking to attract a new department store as part of a redevelopment of the Town Centre North- how would the expansion of Brookfield impact on the potential for this?	The 2015 Broxbourne Retail & Leisure Study provides a detailed retail and leisure need assessment for Broxbourne. No named operators have committed as there is not currently a scheme to commit to. The Council aspirations are for a mixed town centre layout type development (rather than retail park) potentially including an anchor store.
17	Harlow Council	The new study classes 5% as not significant -What constitutes significant?	Whether a % impact level is considered to be 'significant adverse' depends on local circumstances eg. the health of the centre. For example a 10% impact on a 'fragile centre' <u>may</u> be considered to constitute a significant impact but a 10% impact on a 'reasonably health centre' <u>may</u> not. In the case of Harlow Town Centre, it is a strong relatively healthy centre which is performing well. Taking into account, *inter alia*, the health of the centre a 5% cumulative impact is not considered to constitute a 'significant adverse' impact. It should be noted that the 5% impact figure is lower than 7% assessed by GVA in the previous Broxbourne Core Strategy

No.	Council	Comments	Response
			Evidence Base Bridging Report for Brookfield undertaken in 2010. GVA did not consider this to be significant.
18	Stevenage Borough Council	We conclude that the development at Brookfield would not have any significant effect on the retail structure of Stevenage. We concur with the conclusions that WYG have come to in the Brookfield Retail and Leisure Impact Study, July 2016. Stevenage Borough Council are content with the study and its findings.	NA
19	Welwyn Hatfield Borough Council	No concerns with the principle of mixed-use development at Brookfield, which appears to be evolving as a well-designed scheme. It's evident that the Council is unable to deliver any meaningful increase in retail floorspace within Broxbourne's existing town centres. The Council's decision to pursue development at Brookfield may therefore be inevitable. Concerned with the amount of comparison goods retail floorspace proposed at Brookfield. The Council's retail planning consultants, Carter Jonas, has raised three main issues with the way in which the comparison floorspace need for Broxbourne has been established (see response no. 20, 21 and 22 below)	NA
20	Welwyn Hatfield Borough Council	It's only possible to establish a sufficient floorspace need for Brookfield by using the maximum need figure in your Retail and Leisure Study (Figure 7.5/7.6 on p93), which converts expenditure capacity to floorspace at a level typical for bulky goods retail (£2,500 per sq m). By contrast, our consultants would expect to see this calculated based on sales densities for general retail (i.e. what is actually envisaged for Brookfield) of around £5,000 per sq m. They note that WYG themselves even use figures in this order when testing the impact of Brookfield,	The June 2016 Retail & Leisure Study Addendum provides both minimum and maximum floorspace need/capacity figures. It tests two sales density scenarios (£2,500/sq m and £4,500/sq m). The floorspace capacity would vary subject to what type of retailer occupied the floorspace – hence two sales density scenarios are provided in the study and study addendum.

No.	Council	Comments	Response
		with scenarios between £4,500-£6,000 per sq m set out on p9 of the Retail and Leisure Impact Study.	Notwithstanding the above, as acknowledge by Welwyn Hatfield Borough Council, the Brookfield impact assessment provides and test three different sales density scenarios.
21	Welwyn Hatfield Borough Council	The minimum floorspace in Figure 7.5 (the constant market share scenario) is considered to represent actual retail need for Broxbourne. Figure 7.6 (the market share uplift scenario) is considered to represent a policy aspiration not based on need (i.e. policy-on) and whilst we appreciate that increasing the borough's retail market share is a key ambition for Broxbourne, the proper means to justify this would be via the Local Plan.	The retail needs for the Borough are being justified via the Local Plan. The 2015 Retail and Leisure Study, Retail Study Addendum, and Brookfield Impact Assessment are all Local Plan evidence base documents.
22	Welwyn Hatfield Borough Council	Emerging Experian comparison retail expenditure projections appear to be much less optimistic (e.g. 0.3% growth in 2017 rather than the 2.9% forecast previously, and 0.8% rather than 2.8% for 2018), and so in any case floorspace need is likely to be less than that already forecast.	The Broxbourne Retail Study Addendum (June 2016) takes into account Experian's latest projections (Retail Planner Briefing Note 13 (October 2015). The Retail Study Addendum is used as the baseline in terms of population, expenditure and shopping patterns for the Brookfield Retail Impact Study.
23	Welwyn Hatfield Borough Council	Welwyn Borough Council's recent Retail and Town Centre Needs Assessment concluded that Welwyn Garden City Town Centre is generally healthy, and our consultants agree that in quantitative terms a 4.4% trade diversion is unlikely to be materially harmful. However, our consultants also highlight Welwyn Garden City's unusual situation given its size in hosting two department stores (John Lewis and Debenhams) which are responsible for significant number of linked trips. This makes Welwyn Garden City somewhat vulnerable to the loss of either of these two stores, and if Brookfield were to bring this about then the centre would be materially harmed. We therefore suggest that p39 should also include a more qualitative assessment of the potential impact of Brookfield on Welwyn Garden City.	At the time of writing the Broxbourne Retail Study Addendum (June 2016) takes into account Experian's latest projections (Retail Planner Briefing Note 13 (October 2015). The Retail Study Addendum is used as the baseline in terms of population, expenditure and shopping patterns for the Brookfield Retail Impact Study.
24	Welwyn Hatfield	Although Hatfield Town Centre is not generally as healthy a centre as Welwyn Garden City, it serves a much more local	NA

No.	Council	Comments	Response
	Borough Council	catchment and its only anchor store is a supermarket. Our consultants therefore agree that a 1.6% trade diversion is unlikely to be materially harmful.	
25	Welwyn Hatfield Borough Council	In light of the emerging Experian projections showing lower retail expenditure growth, it would be worth the Impact Study also reflecting on whether the impact on neighbouring town centres could in fact be higher than the headline percentage trade diversion figures reported.	At the time of writing the Broxbourne Retail Study Addendum (June 2016) takes into account Experian's latest projections (Retail Planner Briefing Note 13 (October 2015). The Retail Study Addendum is used as the baseline in terms of population, expenditure and shopping patterns for the Brookfield Retail Impact Study.

Appendix C
Statistical Retail Impact Tables

BROXBOURNE BOROUGH COUNCIL
PLANNED RETAIL AND LEISURE FLOORSPACE - BROOKFIELD
QUANTITATIVE RETAIL IMPACT ASSESSMENT

Table 1: Total Survey Derived Comparison Goods Market Share, 2016 (%) - No New Development

Destination	Total Study Area (%)	Zone 1 (%)	2 (%)	3 (%)	4 (%)	5 (%)	6 (%)	7 (%)	8 (%)	9 (%)	10 (%)	11 (%)	12 (%)	13 (%)
Brookfield	12	16	28	28	31	3	10	12	5	14	5	10	14	1
Waltham Cross Town Centre	6	1	10	8	21	3	12	6	6	10	3	1	3	
Hoddesdon Town Centre	3	24	8	2	3	0		1		0	0	1	4	
Cheshunt Old Pond District Centre	2	3	6	10	4	3	2			5	3	2	2	0
Other within Broxbourne	1	0	3	2	1	1		1	1	0	0		0	
Sub Total Borough of Broxbourne	**24**	**45**	**55**	**50**	**60**	**10**	**25**	**20**	**12**	**29**	**11**	**14**	**23**	**1**
Harlow Town Centre	15	21	19	5	5	60	6	2		2	7	15	18	55
Harlow Retail Parks/Foodstores	7	12	5	4	1	21	2	0			5	7	9	25
Enfield Town Centre	14	2	2	5	9	0	4	44	41	4	5	0	9	1
Enfield Retail Parks/Foodstores	7	1	7	6	6		5	21	20	1	0	0		0
Welwyn Garden City Town Centre	7	6	2	8	4	2	2		4	37	33	11	7	
Hertford Town Centre	3	2	1	1	0		0	0			13	15	8	
Hertford Retail Parks/Foodstores	0	0									1	3	1	
Hatfield Town Centre	1	2	0	1	0				1	4	2	2	1	2
Hatfield Retail Parks/Foodstores	0		0	0						1	0	1		
Stevenage Town Centre	2	1	0	0	0				1	1	2	11	5	
Stevenage Retail Parks/Foodstores	2	1	1	5	2		13			1	1	2	2	
Lakeside Shopping Centre	2	3	1	0	1	2	2	1			1		5	7
Bluewater Shopping Centre	1			1	0	0	2		2		0			
Other (including Central London)	15	3	6	12	11	5	38	11	21	21	18	19	11	9
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Notes:
Derived from Updated Table 25 of Borough of Broxbourne Retail & Leisure Study - Retail Addendum Note (May 2016)
Figures may not add due to rounding

2012 Prices

BROXBOURNE BOROUGH COUNCIL
PLANNED RETAIL AND LEISURE FLOORSPACE - BROOKFIELD
QUANTITATIVE RETAIL IMPACT ASSESSMENT

Table 2: Total Survey Derived Convenience Goods Market Share, 2016 (%) - No New Development

Destination	Total Study Area (%)	Zone												
		1 (%)	2 (%)	3 (%)	4 (%)	5 (%)	6 (%)	7 (%)	8 (%)	9 (%)	10 (%)	11 (%)	12 (%)	13 (%)
Brookfield	14	13	41	57	49	3	2	5	1	28	5	13		2
Waltham Cross Town Centre	4		0	9	14		5	14	1		0	4	1	
Hoddesdon Town Centre	13	74	45	5	10	18	1	11		3	11	15	25	
Cheshunt Old Pond District Centre	2	1	4	10	13	0	1							
Other within Borough	2	4	5	8	6	1	1			4	0			
Sub Total Borough of Broxbourne	**34**	**92**	**96**	**89**	**91**	**22**	**9**	**30**	**3**	**35**	**17**	**32**	**27**	**2**
Harlow Town Centre	4	1				21	1		1				2	18
Other Harlow	12	1	1			51	1			2		0		72
Enfield Town Centre	3							1	19					
Other Enfield	16		0	5	2	1	3	40	64	6				
Welwyn Garden City Town Centre	0					1								
Other Welwyn Garden City	0		0	2						2	2	1		
Hertford Town Centre	1	1	1	0	0						9	5	6	
Other Hertford	8	1	0	1							57	34	46	
Hatfield Town Centre	0			0		1				0	1			
Other Hatfield	0									4	3			
Stevenage Town Centre	1	0										4	1	
Other	21	2	1	3	6	4	86	29	13	51	11	24	18	8
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Notes:
Derived from Updated Table 4 of Borough of Broxbourne Retail & Leisure Study - Retail Addendum Note (May 2016)
Figures may not add due to rounding

2012 Prices

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Table 3: Comparison Goods Expenditure, 2016 - No New Development (£m Spend)

Destination	Zone													Total Study Area	Trade from Beyond Study Area	Total Turnover
	1	2	3	4	5	6	7	8	9	10	11	12	13			
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
Brookfield	10.7	0.6	18.4	29.3	1.2	10.2	12.7	10.0	8.3	2.1	10.8	10.1	1.5	126.0	6.3	132.3
Waltham Cross Town Centre	0.7	0.2	5.4	19.6	1.2	12.1	7.0	10.1	6.0	1.0	0.8	1.9		66.1	3.0	69.2
Hoddesdon Town Centre	16.2	0.2	1.2	3.1	0.2		1.0		0.0	0.1	1.0	3.1		26.1	0.9	27.1
Cheshunt Old Pond District Centre	2.1	0.1	6.6	3.6	1.1	2.2			3.0	1.3	2.6	1.4	0.4	24.7	1.2	25.9
Other within Broxbourne	0.1	0.1	1.4	0.8	0.4		1.5	1.5	0.1	0.1		0.2		6.2	-	6.2
Sub Total Borough of Broxbourne	**29.9**	**1.2**	**33.1**	**56.4**	**4.1**	**24.6**	**22.2**	**21.7**	**17.4**	**4.6**	**15.3**	**16.8**	**1.9**	**249.1**	**11.5**	**260.6**
Harlow Town Centre	13.9	0.4	3.6	4.4	25.4	5.6	1.7		1.3	2.7	16.4	12.9	75.9	164.3	146.2	310.5
Harlow Retail Parks/Foodstores	8.1	0.1	3.0	0.9	9.0	2.4	0.5			1.9	7.9	6.5	34.1	74.5		
Enfield Town Centre	1.6	0.0	3.2	8.1	0.1	4.4	47.7	74.2	2.5	1.9	0.4	6.7	1.9	152.6	19.0	171.6
Enfield Retail Parks/Foodstores	0.9	0.2	3.7	5.3		5.0	23.5	35.6	0.6	0.2	0.5		0.1	75.5		
Welwyn Garden City Town Centre	4.1	0.1	5.2	4.0	1.0	1.8		6.8	22.8	13.5	12.2	5.2		76.5	175.3	251.8
Hertford Town Centre	1.4	0.0	0.9	0.4		0.4	0.3			5.2	17.1	5.7		31.5	10.8	42.2
Hertford Retail Parks/Foodstores	0.2									0.3	3.4	0.9		4.7		
Hatfield Town Centre	1.3	0.0	1.0	0.2				1.2	2.2	0.8	2.3	0.4	2.4	11.8	42.3	54.0
Hatfield Retail Parks/Foodstores		0.0	0.0						0.7	0.2	1.4			2.4		
Stevenage Town Centre	0.8	0.0	0.2	0.2				1.2	0.4	0.9	12.2	3.4		19.3	83.4	102.7
Stevenage Retail Parks/Foodstores	0.6	0.0	3.5	1.8		12.3			0.3	0.5	2.6	1.5		23.1		
Lakeside Shopping Centre	1.7	0.0	0.2	1.3	0.7	2.2	1.4			0.3		3.7	9.8	21.5		
Bluewater Shopping Centre			0.4	0.3	0.1	1.8		4.1		0.1				6.9		
Other (including Central London)	2.3	0.1	8.3	10.1	2.1	37.5	12.1	37.8	12.8	7.3	21.5	8.2	12.6	172.8		
Total	**66.7**	**2.2**	**66.2**	**93.5**	**42.6**	**98.1**	**109.3**	**182.7**	**61.0**	**40.4**	**113.0**	**71.9**	**138.8**	**1,086**		

Notes:
Turnover of Existing Centres/Facilities derived from Borough of Broxbourne Retail & Leisure Study - Retail Addendum Note (May 2016). Assessed facilities gain from pro-rata growth in expenditure between 2015-2016 (derived from Retail & Leisure Study Updated Table 8)
Town centre trade drawn from beyond study area derived from latest Retail Studies for the relevant neighbouring boroughs/districts (survey area turnover deducted from identified total comparison goods turnover figure)
Figures may not add due to rounding

2012 Prices

Table 4: Convenience Goods Expenditure, 2016 - No New Development (£m Spend)

Destination	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Total Study Area (£m)	Trade from Beyond Study Area (£m)	Total Turnover (£m)
Brookfield	5.6	14.5	23.6	30.9	0.9	1.1	3.9	1.5	10.0	1.2	8.9		2.3	104.4	3.1	107.5
Waltham Cross Town Centre		0.1	3.6	8.8		3.2	11.9	1.5		0.1	2.9	0.6		32.8	-	32.8
Hoddesdon Town Centre	31.6	15.9	2.1	6.4	5.0	0.8	9.5		1.2	2.5	10.8	11.0		96.8	-	96.8
Cheshunt Old Pond District Centre	0.5	1.3	4.0	8.3	0.1	0.5								14.7	-	14.7
Other within Borough	1.8	1.8	3.5	3.5	0.1	0.4			1.4	0.1				12.7	-	12.7
Sub Total Borough of Broxbourne	**39.5**	**33.7**	**36.7**	**58.0**	**6.1**	**6.0**	**25.3**	**3.0**	**12.6**	**4.0**	**22.5**	**11.6**	**2.3**	**261.3**	**3.1**	**264.5**
Harlow Town Centre	0.6				5.8	0.5		1.4				0.8	18.6	27.7	20.4	48.1
Other Harlow	0.5	0.3			13.9	0.8			0.7		0.2		74.1	90.5		
Enfield Town Centre							1.0	23.2						24.2	15.4	39.6
Other Enfield		0.1	1.9	1.4	0.3	1.8	34.1	78.0	2.1					119.6		
Welwyn Garden City Town Centre					0.1									0.1	43.0	43.1
Other Welwyn Garden City		0.2	0.6						0.7	0.6	0.5			2.5		
Hertford Town Centre	0.2	0.4	0.2	0.3						2.2	3.5	2.7		9.5	55.1	64.7
Other Hertford	0.6	0.1	0.4							13.7	24.2	19.9		58.8		
Hatfield Town Centre			0.2		0.1				0.1	0.4				0.8	52.2	52.9
Other Hatfield									1.4	0.6				2.0		
Stevenage Town Centre	0.2										3.0	0.6		3.8	61.3	65.1
Other	1.0	0.5	1.2	3.8	1.1	55.1	24.4	15.4	18.6	2.5	16.9	8.0	8.2	156.7		
Total	**42.7**	**35.1**	**41.1**	**63.5**	**27.5**	**64.3**	**84.8**	**121.1**	**36.2**	**23.9**	**70.8**	**43.7**	**103.1**	**757.7**		

Notes:

Turnover of Existing Centres/Facilities derived from Borough of Broxbourne Retail & Leisure Study - Retail Addendum Note (May 2016). Assessed facilities gain from pro-rata growth in expenditure between 2015-2016 (derived from Retail & Leisure Study Updated Table 2)
Town centre trade drawn from beyond study area derived from latest Retail Studies for the relevant neighbouring boroughs/districts (survey area turnover deducted from identified total convenience goods turnover figure)
Figures may not add due to rounding

2012 Prices

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Table 5: Comparison Goods Expenditure, 2024 - No New Development (£m Spend)

Destination	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Total Study Area (£m)	Trade from Beyond Study Area (£m)	Total Turnover (£m)
Brookfield	13.9	21.0	23.9	37.9	1.5	13.0	17.2	13.0	10.6	2.7	14.0	13.5	1.9	184.0	9.2	193.2
Waltham Cross Town Centre	0.9	7.2	7.0	25.3	1.6	15.5	9.4	13.1	7.6	1.3	1.1	2.6		92.6	4.3	96.8
Hoddesdon Town Centre	20.9	6.1	1.6	4.0	0.3		1.3		0.0	0.1	1.3	4.1		39.7	1.4	41.2
Cheshunt Old Pond District Centre	2.8	4.3	8.6	4.7	1.4	2.9			3.8	1.7	3.4	1.8	0.6	36.0	1.8	37.8
Other within Broxbourne	0.1	2.0	1.8	1.0	0.5		2.1	2.0	0.1	0.2		0.3		10.1	-	10.1
Sub Total Borough of Broxbourne	**38.6**	**40.5**	**42.9**	**73.0**	**5.3**	**31.3**	**29.9**	**28.1**	**22.2**	**6.1**	**19.8**	**22.3**	**2.5**	**362.4**	**16.7**	**379.1**
Harlow Town Centre	17.9	14.3	4.7	5.8	32.4	7.2	2.3		1.6	3.5	21.3	17.1	97.9	226.0	253.4	479.4
Harlow Retail Parks/Foodstores	10.5	3.7	3.8	1.1	11.5	3.1	0.7			2.6	10.2	8.6	43.9	99.9		
Enfield Town Centre	2.0	1.4	4.1	10.5	0.1	5.6	64.3	96.1	3.2	2.5	0.5	8.9	2.4	201.6	50.2	251.7
Enfield Retail Parks/Foodstores	1.2	5.3	4.8	6.9		6.4	31.6	46.1	0.7	0.2	0.6		0.2	104.1		
Welwyn Garden City Town Centre	5.2	1.8	6.8	5.2	1.3	2.3		8.8	29.1	17.7	15.8	6.9		100.9	208.6	309.5
Hertford Town Centre	1.8	0.4	1.2	0.6		0.5	0.3			6.8	22.2	7.6		41.5	12.3	53.8
Hertford Retail Parks/Foodstores	0.2									0.4	4.4	1.1		6.2		
Hatfield Town Centre	1.7	0.3	1.2	0.2				1.6	2.9	1.0	2.9	0.6	3.1	15.5	64.8	80.4
Hatfield Retail Parks/Foodstores		0.1	0.1						0.9	0.3	1.8			3.2		
Stevenage Town Centre	1.0	0.2	0.3	0.2				1.5	0.5	1.2	15.9	4.5		25.3	104.0	129.3
Stevenage Retail Parks/Foodstores	0.7	0.5	4.5	2.3		15.7			0.4	0.7	3.4	2.0		30.1		
Lakeside Shopping Centre	2.2	1.0	0.3	1.7	0.9	2.8	1.8			0.4		5.0	12.6	28.8		
Bluewater Shopping Centre			0.5	0.4	0.2	2.3		5.3		0.2				9.0		
Other (including Central London)	3.0	4.6	10.7	13.1	2.7	47.8	16.3	49.0	16.3	9.6	27.9	10.9	16.2	228.2		
Total	**86.1**	**74.2**	**85.9**	**121.0**	**54.4**	**125.0**	**147.3**	**236.5**	**77.9**	**53.1**	**146.7**	**95.6**	**178.9**	**1,483**		

Notes:

Turnover of Existing Centres/Facilities derived from Borough of Broxbourne Retail & Leisure Study - Retail Addendum Note (May 2016). Aassessed facilities gain from pro-rata growth in expenditure between 2015-2024 (derived from Retail & Leisure Study Updated Table 8)

Town centre trade drawn from beyond study area derived from latest Retail Studies for the relevant neighbouring boroughs/districts (survey area turnover deducted from identified total comparison goods turnover figure)

Figures may not add due to rounding

2012 Prices

Table 6: Convenience Goods Expenditure, 2024- No New Development (£m Spend)

Destination	Zone													Total Study Area (£m)	Trade from Beyond Study Area (£m)	Total Turnover (£m)
	1 (£m)	2 (£m)	3 (£m)	4 (£m)	5 (£m)	6 (£m)	7 (£m)	8 (£m)	9 (£m)	10 (£m)	11 (£m)	12 (£m)	13 (£m)			
Brookfield	5.7	14.8	24.1	31.5	0.9	1.1	4.1	1.5	10.1	1.3	9.1		2.3	106.5	3.2	109.7
Waltham Cross Town Centre		0.1	3.7	9.0		3.2	12.5	1.6		0.1	3.0	0.7		33.8	-	33.8
Hoddesdon Town Centre	32.2	16.2	2.2	6.5	5.0	0.8	10.0		1.2	2.6	11.1	11.5		99.4	-	99.4
Cheshunt Old Pond District Centre	0.5	1.3	4.1	8.5	0.1	0.5								15.0	-	15.0
Other within Borough	1.8	1.9	3.6	3.6	0.1	0.4			1.4	0.1				12.9	-	12.9
Sub Total Borough of Broxbourne	**40.2**	**34.2**	**37.7**	**59.1**	**6.2**	**6.1**	**26.6**	**3.1**	**12.7**	**4.1**	**23.2**	**12.2**	**2.3**	**267.6**	**3.2**	**270.8**
Harlow Town Centre	0.6				5.8	0.5		1.4				0.8	18.8	28.1	53.9	82.0
Other Harlow	0.6	0.3			14.2	0.8			0.7		0.2		75.2	91.8		
Enfield Town Centre							1.0	23.4						24.4	41.7	66.1
Other Enfield		0.1	1.9	1.5	0.3	1.8	35.8	78.6	2.2					122.1		
Welwyn Garden City Town Centre					0.1									0.1	46.2	46.3
Other Welwyn Garden City		0.2	0.7						0.7	0.6	0.5			2.6		
Hertford Town Centre	0.2	0.4	0.2	0.3						2.3	3.6	2.9		9.9	72.3	82.2
Other Hertford	0.6	0.1	0.4							14.2	24.9	20.9		61.1		
Hatfield Town Centre			0.2		0.1				0.1	0.4				0.8	56.3	57.1
Other Hatfield									1.4	0.6				2.1		
Stevenage Town Centre	0.2										3.0	0.7		3.9	75.1	79.0
Other	1.0	0.5	1.2	3.9	1.2	55.3	25.6	15.5	18.8	2.6	17.3	8.4	8.3	159.7		
Total	**43.5**	**35.7**	**42.1**	**64.8**	**27.9**	**64.5**	**88.9**	**122.1**	**36.5**	**24.9**	**72.7**	**45.9**	**104.6**			

Notes:
Turnover of Existing Centres/Facilities derived from Borough of Broxbourne Retail & Leisure Study - Retail Addendum Note (May 2016). Assessed facilities gain from pro-rata growth in expenditure between 2015-2016 (derived from Retail & Leisure Study Updated Table 2)
Town centre trade drawn from beyond study area derived from latest Retail Studies for the relevant neighbouring boroughs/districts (survey area turnover deducted from identified total convenience goods turnover figure)
Figures may not add due to rounding

2012 Prices

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Table 7: Planned Comparison Goods Floorspace - Brookfield, 2024

	Net Floorspace (sq m)	Average Sales Density (£/sq m)	Turnover (£m)
	[1]	**[2]**	**[3]**
a - Low sales density		4,500	126.0
b - Medium sales density	28,000	5,500	154.0
c - High sales density		6,000	168.0

Table 8: Planned Convenience Goods Floorspace - Brookfield, 2024

	Net Floorspace (sq m)	Average Sales Density (£/sq m)	Turnover (£m)
	[1]	**[2]**	**[3]**
Foodstore	3,000	12,000	36.0

Notes:
[3] = [1] x [2] /1000000

2012 Prices

Table 9: Brookfield Comparison Goods Assessed Trade Draw, 2024

		Zone													Total Zones 1-13	Beyond Study Area	Total
		1	2	3	4	5	6	7	8	9	10	11	12	13			
[1]	Brookfield's Existing Market Share (%)	16	28	28	31	3	10	12	5	14	5	10	14	1	12	-	-
[2]	Existing Retail Facilities - Brookfield Turnover (£m), 2024	13.9	21.0	23.9	37.9	1.5	13.0	17.2	13.0	10.6	2.7	14.0	13.5	1.9	184.0	9.2	193.2
[3]	Brookfield's Existing Trade Draw by Zone (%)	7	11	12	20	1	7	9	7	6	1	7	7	1	95	5	100
[4]	New Scheme Trade Draw by Zones (%), 2024	7	11	12	20	1	7	9	7	6	1	7	7	1	95	5	100
[5a]	New Scheme Trade Draw by Zones (£m), 2024 - (a) Low Sales Density	9.0	13.7	15.6	24.7	1.0	8.5	11.2	8.5	6.9	1.8	9.1	8.8	1.2	120.0	6.0	126.0
[5b]	New Scheme Trade Draw by Zones (£m), 2024 - (b) Medium Sales Density	11.0	16.7	19.0	30.2	1.2	10.3	13.7	10.4	8.5	2.2	11.2	10.7	1.5	146.7	7.3	154.0
[5c]	New Scheme Trade Draw by Zones (£m), 2024 - (C) High Sales Density	12.0	18.2	20.8	32.9	1.3	11.3	14.9	11.3	9.2	2.4	12.2	11.7	1.7	160.0	8.0	168.0

Notes:
[1] Taken from Table 1
[2] Taken from Table 5
[3] Derived from [2]
[4] Assessed new Brookfield scheme would have same zonal trade draw patterns as existing retail facilities within Brookfield (see Table 9)
[5] Total turnover figures derived from Table 7
Figures may not add due to rounding

2012 Prices

Table 10: Brookfield Convenience Goods Assessed Trade Draw, 2024

		Zone													Total Zones 1-13	Beyond Study Area	Total
		1	2	3	4	5	6	7	8	9	10	11	12	13			
[1]	Brookfield's Existing Market Share (%)	13	41	57	49	3	2	5	1	28	5	13		2	14	-	-
[2]	Existing Retail Facilities - Brookfield Turnover (£m), 2024	5.7	14.8	24.1	31.5	0.9	1.1	4.1	1.5	10.1	1.3	9.1		2.3	106.5	3.2	109.7
[3]	Brookfield's Existing Trade Draw by Zone (%)	5	13	22	29	1	1	4	1	9	1	8		2	97	3	100
[4]	New Scheme Trade Draw by Zones (%), 2024	5	13	22	29	1	1	4	1	9	1	8		2	97	3	100
[5]	New Scheme Trade Draw by Zones (£m), 2024	1.9	4.8	7.9	10.3	0.3	0.4	1.3	0.5	3.3	0.4	3.0		0.8	35.0	1.0	36.0

Notes:
[1] Taken from Table 1
[2] Taken from Table 6
[3] Derived from [2]
[4] Assessed new Brookfield scheme would have same zonal trade draw patterns as existing retail facilities within Brookfield (see Table 9)
[5] Total turnover figure derived from Table 8
Figures may not add due to rounding

2012 Prices

Table 11a: Comparison Goods Expenditure, 2024 - With Brookfield Development (Low Sales Density Scenario)

Destination	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Total Study Area (£m)	Trade from Beyond Study Area (£m)	Total Turnover (£m)
Brookfield	21.6	30.5	34.2	55.7	2.5	19.7	27.2	20.6	16.6	4.4	22.7	21.6	3.1	280.4	14.6	295.0
Waltham Cross Town Centre	0.8	6.3	6.8	23.5	1.6	15.1	9.1	12.9	7.3	1.3	1.1	2.5		88.3	4.3	92.6
Hoddesdon Town Centre	20.5	5.9	1.6	3.9	0.3		1.3		0.0	0.1	1.3	4.0		38.8	1.4	40.3
Cheshunt Old Pond District Centre	2.7	4.1	8.3	4.6	1.4	2.9			3.8	1.7	3.4	1.8	0.6	35.3	1.8	37.1
Other within Broxbourne	0.1	2.0	1.8	1.0	0.5		2.0	2.0	0.1	0.2		0.3		10.0		10.0
Sub Total Borough of Broxbourne	**45.7**	**48.8**	**52.7**	**88.6**	**6.2**	**37.7**	**39.7**	**35.5**	**27.8**	**7.7**	**28.5**	**30.2**	**3.7**	**452.9**	**16.1**	**469.0**
Harlow Town Centre	14.5	9.3	3.2	2.5	31.8	5.9	1.2		1.2	3.4	19.8	14.3	97.1	204.4	252.5	456.8
Harlow Retail Parks/Foodstores	9.4	3.1	3.1	0.7	11.3	2.8	0.5			2.5	9.3	7.9	43.6	94.2		
Enfield Town Centre	1.9	1.2	3.2	7.7	0.1	5.3	60.4	93.5	2.7	2.4	0.4	8.1	2.4	189.2	49.3	238.5
Enfield Retail Parks/Foodstores	1.0	4.7	4.0	4.6		5.9	29.4	44.4	0.7	0.2	0.6		0.2	95.6		
Welwyn Garden City Town Centre	4.5	1.5	4.6	3.0	1.3	2.1		8.2	26.4	17.0	14.6	6.2		89.3	208.0	297.3
Hertford Town Centre	1.7	0.2	1.1	0.6		0.5	0.3			6.5	20.7	6.5		38.1	12.0	50.2
Hertford Retail Parks/Foodstores	0.1									0.4	4.1	1.1		5.7		
Hatfield Town Centre	1.5	0.3	1.1	0.2				1.4	2.3	0.9	2.7	0.6	3.1	14.1	64.5	78.7
Hatfield Retail Parks/Foodstores		0.1	0.1						0.8	0.3	1.7			2.9		
Stevenage Town Centre	0.7	0.2	0.1	0.1				1.4	0.4	1.2	14.7	4.3		23.0	103.7	126.7
Stevenage Retail Parks/Foodstores	0.7	0.3	3.9	2.1		14.9			0.3	0.7	3.1	2.0		27.8		
Lakeside Shopping Centre	1.9	0.6	0.3	1.2	0.9	2.6	1.3			0.4		4.4	12.6	26.1		
Bluewater Shopping Centre			0.3	0.3	0.2	2.1		4.9		0.2				7.9		
Other (including Central London)	2.5	3.9	8.4	9.4	2.7	45.3	14.5	47.3	15.3	9.4	26.5	10.0	16.2	211.4		
Total	**86.1**	**74.2**	**85.9**	**121.0**	**54.4**	**125.0**	**147.3**	**236.5**	**77.9**	**53.1**	**146.7**	**95.6**	**178.9**	1,483		

Notes:
Assessed new Brookfield scheme would have same zonal trade draw patterns as existing retail facilities within Brookfield (see Table 9)
Trade draw within each zone has been assessed having regard to the existing shopping patterns and location of existing retail facilities
Figures may not add due to rounding

2012 Prices

BROXBOURNE BOROUGH COUNCIL
PLANNED RETAIL AND LEISURE FLOORSPACE - BROOKFIELD
QUANTITATIVE RETAIL IMPACT ASSESSMENT

Table 11b: Comparison Goods Expenditure, 2024 - With Brookfield Development (Medium Sales Density Scenario)

Destination	Zone													Total Study Area	Trade from Beyond Study Area	Total Turnover
	1 (£m)	2 (£m)	3 (£m)	4 (£m)	5 (£m)	6 (£m)	7 (£m)	8 (£m)	9 (£m)	10 (£m)	11 (£m)	12 (£m)	13 (£m)	(£m)	(£m)	(£m)
Brookfield	23.3	32.7	36.5	59.6	2.7	21.3	29.5	22.3	17.9	4.7	24.6	23.4	3.4	301.8	14.5	316.3
Waltham Cross Town Centre	0.8	6.1	6.7	23.1	1.6	15.1	9.1	12.8	7.3	1.3	1.1	2.5		87.4	4.3	91.7
Hoddesdon Town Centre	20.4	5.8	1.6	3.9	0.3		1.3		0.0	0.1	1.3	4.0		38.6	1.4	40.1
Cheshunt Old Pond District Centre	2.7	4.1	8.3	4.6	1.4	2.9			3.8	1.7	3.4	1.8	0.6	35.2	1.8	37.0
Other within Broxbourne	0.1	1.9	1.8	1.0	0.5		2.0	1.9	0.1	0.2		0.3		9.9		9.9
Sub Total Borough of Broxbourne	**47.3**	**50.7**	**54.9**	**92.1**	**6.4**	**39.2**	**41.8**	**37.1**	**29.1**	**8.1**	**30.4**	**32.0**	**4.0**	**473.0**	**16.0**	**489.0**
Harlow Town Centre	13.7	8.2	2.9	1.8	31.6	5.6	1.0		1.1	3.4	19.5	13.7	97.0	199.6	252.3	451.8
Harlow Retail Parks/Foodstores	9.2	2.9	2.9	0.5	11.2	2.8	0.5			2.4	9.1	7.8	43.5	92.9		
Enfield Town Centre	1.8	1.1	3.0	7.1	0.1	5.2	59.5	93.0	2.5	2.4	0.4	8.0	2.4	186.5	49.1	235.6
Enfield Retail Parks/Foodstores	1.0	4.5	3.8	4.0		5.8	28.9	44.1	0.6	0.2	0.6		0.2	93.7		
Welwyn Garden City Town Centre	4.3	1.5	4.1	2.5	1.3	2.0		8.0	25.8	16.8	14.3	6.1		86.7	207.9	294.6
Hertford Town Centre	1.7	0.2	1.0	0.6		0.5	0.3			6.5	20.4	6.2		37.4	12.0	49.4
Hertford Retail Parks/Foodstores	0.1									0.4	4.0	1.1		5.6		
Hatfield Town Centre	1.5	0.2	1.0	0.2				1.3	2.2	0.9	2.7	0.6	3.1	13.8	64.5	78.3
Hatfield Retail Parks/Foodstores		0.1	0.1						0.8	0.3	1.6			2.9		
Stevenage Town Centre	0.6	0.2	0.1	0.1				1.3	0.4	1.2	14.4	4.2		22.5	103.6	126.1
Stevenage Retail Parks/Foodstores	0.7	0.3	3.7	2.0		14.7			0.3	0.7	3.0	1.9		27.3		
Lakeside Shopping Centre	1.8	0.5	0.3	1.1	0.9	2.5	1.2			0.4		4.2	12.6	25.5		
Bluewater Shopping Centre			0.2	0.3	0.2	2.0		4.8		0.2				7.7		
Other (including Central London)	2.4	3.8	7.9	8.6	2.7	44.7	14.1	46.9	15.0	9.3	26.3	9.8	16.2	207.6		
Total	**86.1**	**74.2**	**85.9**	**121.0**	**54.4**	**125.0**	**147.3**	**236.5**	**77.9**	**53.1**	**146.7**	**95.6**	**178.9**	**1,483**		

Notes:
Assessed new Brookfield scheme would have same zonal trade draw patterns as existing retail facilities within Brookfield (see Table 9)
Trade draw within each zone has been assessed having regard to the existing shopping patterns and location of existing retail facilities
Figures may not add due to rounding

2012 Prices

Table 11c: Comparison Goods Expenditure, 2024 - With Brookfield Development (High Sales Density Scenario)

Destination	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Total Study Area (£m)	Trade from Beyond Study Area (£m)	Total Turnover (£m)
Brookfield	24.1	33.7	37.6	61.6	2.8	22.0	30.6	23.2	18.5	4.9	25.6	24.3	3.5	312.5	14.4	327.0
Waltham Cross Town Centre	0.8	6.0	6.7	22.9	1.6	15.0	9.0	12.8	7.2	1.3	1.1	2.5		86.9	4.3	91.2
Hoddesdon Town Centre	20.3	5.8	1.6	3.9	0.3		1.3		0.0	0.1	1.3	3.9		38.5	1.4	40.0
Cheshunt Old Pond District Centre	2.7	4.1	8.3	4.6	1.4	2.9			3.7	1.7	3.4	1.8	0.6	35.1	1.8	36.9
Other within Broxbourne	0.1	1.9	1.8	1.0	0.5		2.0	1.9	0.1	0.2		0.3		9.9		9.9
Sub Total Borough of Broxbourne	**48.1**	**51.6**	**55.9**	**93.9**	**6.5**	**39.9**	**42.9**	**37.9**	**29.7**	**8.3**	**31.3**	**32.9**	**4.1**	**483.0**	**15.9**	**498.9**
Harlow Town Centre	13.3	7.7	2.8	1.5	31.6	5.5	0.9		1.1	3.4	19.3	13.4	96.9	197.2	252.1	449.3
Harlow Retail Parks/Foodstores	9.1	2.8	2.8	0.5	11.2	2.7	0.5			2.4	9.0	7.7	43.5	92.3		
Enfield Town Centre	1.8	1.1	2.9	6.8	0.1	5.1	59.1	92.7	2.5	2.4	0.4	7.9	2.4	185.1	49.0	234.1
Enfield Retail Parks/Foodstores	1.0	4.4	3.7	3.8		5.7	28.6	43.9	0.6	0.2	0.6		0.2	92.7		
Welwyn Garden City Town Centre	4.3	1.4	3.9	2.2	1.3	2.0		8.0	25.4	16.8	14.2	6.0		85.5	207.8	293.3
Hertford Town Centre	1.6	0.2	1.0	0.6		0.5	0.3			6.4	20.2	6.1		37.0	11.9	49.0
Hertford Retail Parks/Foodstores	0.1									0.4	3.9	1.1		5.5		
Hatfield Town Centre	1.4	0.2	1.0	0.2				1.3	2.1	0.9	2.7	0.6	3.1	13.7	64.4	78.1
Hatfield Retail Parks/Foodstores		0.1	0.1						0.8	0.3	1.6			2.8		
Stevenage Town Centre	0.5	0.2	0.1	0.1				1.3	0.4	1.2	14.3	4.2		22.3	103.6	125.8
Stevenage Retail Parks/Foodstores	0.7	0.3	3.6	2.0		14.6			0.3	0.7	3.0	1.9		27.1		
Lakeside Shopping Centre	1.8	0.5	0.3	1.1	0.9	2.5	1.1			0.4		4.2	12.6	25.1		
Bluewater Shopping Centre			0.2	0.3	0.2	2.0		4.7		0.2				7.5		
Other (including Central London)	2.4	3.7	7.6	8.2	2.7	44.4	13.9	46.7	14.9	9.3	26.1	9.7	16.2	205.8		
Total	**86.1**	**74.2**	**85.9**	**121.0**	**54.4**	**125.0**	**147.3**	**236.5**	**77.9**	**53.1**	**146.7**	**95.6**	**178.9**	**1,483**		

Notes:

Assessed new Brookfield scheme would have same zonal trade draw patterns as existing retail facilities within Brookfield (see Table 9)

Trade draw within each zone has been assessed having regard to the existing shopping patterns and location of existing retail facilities

Figures may not add due to rounding

2012 Prices

Table 12: Convenience Goods Expenditure, 2024 - With Brookfield Development

Destination	Zone													Total Study Area	Trade from Beyond Study Area	Total Turnover
	1 (£m)	2 (£m)	3 (£m)	4 (£m)	5 (£m)	6 (£m)	7 (£m)	8 (£m)	9 (£m)	10 (£m)	11 (£m)	12 (£m)	13 (£m)	(£m)	(£m)	(£m)
Brookfield	5.0	11.8	18.2	24.0	0.9	1.1	3.9	1.5	8.8	1.3	8.4		2.3	122.0	4.1	126.1
Waltham Cross Town Centre		0.1	3.4	8.3		3.1	12.5	1.5		0.1	3.0	0.7		32.6		32.6
Hoddesdon Town Centre	31.3	14.7	1.9	6.1	5.0	0.8	9.9		1.2	2.6	10.9	11.5		96.0		96.0
Cheshunt Old Pond District Centre	0.5	1.3	3.9	8.2	0.1	0.5								14.6		14.6
Other within Borough	1.8	1.8	3.5	3.5	0.1	0.4			1.4	0.1				12.6		12.6
Sub Total Borough of Broxbourne	**38.6**	**29.7**	**30.8**	**50.1**	**6.1**	**6.0**	**26.3**	**3.0**	**11.3**	**4.1**	**22.2**	**12.2**	**2.3**	**277.8**	**3.1**	**281.9**
Harlow Town Centre	0.6				5.8	0.5		1.4				0.8	18.7	27.8	53.9	81.7
Other Harlow	0.5	0.2			14.0	0.8			0.6		0.1		74.6	90.9		
Enfield Town Centre							1.0	23.3						24.3	41.6	65.9
Other Enfield		0.0	1.6	0.8	0.3	1.8	35.1	78.4	2.0					120.0		
Welwyn Garden City Town Centre					0.1									0.1	46.2	46.3
Other Welwyn Garden City		0.1	0.4						0.6	0.6	0.5			2.3		
Hertford Town Centre	0.2	0.3	0.1	0.2						2.3	3.6	2.9		9.6	72.3	81.8
Other Hertford	0.6	0.0	0.3							13.9	23.7	20.9		59.4		
Hatfield Town Centre			0.1		0.1				0.1	0.4				0.7	56.3	56.9
Other Hatfield									1.4	0.6				2.0		
Stevenage Town Centre	0.2										3.0	0.7		3.9	75.1	79.0
Other	0.9	0.4	0.9	3.3	1.2	55.0	25.2	15.5	17.1	2.6	16.6	8.4	8.2	155.3		
Total	**41.6**	**30.8**	**34.2**	**54.4**	**27.6**	**64.1**	**87.6**	**121.6**	**33.2**	**24.5**	**69.8**	**45.9**	**103.8**	**774.2**		

Notes:
Assessed new Brookfield scheme would have same zonal trade draw patterns as existing retail facilities within Brookfield (see Table 10)
Trade draw within each zone has been assessed having regard to the existing shopping patterns and location of existing retail facilities
Figures may not add due to rounding

2012 Prices

Table 13a: Potential Trading Effects of Planned Brookfield, 2024 (Low Comparison Goods Sales Density Scenario)

Destination	Total Combined Retail Turnover		Residual Combined Total Turnover after Planned Brookfield, 2024 (£m)	Impact of New Floorspace		Residual Combined Total Turnover after Planned Brookfield & Retail Park Commitment, 2024 (£m)	Cumulative Impact	
	2016 (£m)	2024 (£m)		Change in Turnover 2016-2024 (%)	Impact on 2024 Turnover (%)		Change in Turnover 2016-2024 (%)	Impact on 2024 Turnover (%)
	[1]	[2]	[3]	[4]	[5]	[6]	[7]	[8]
Centres Inside Borough								
Waltham Cross Town Centre	101.9	130.6	125.2	22.9	-4.1	125.0	22.6	-4.3
Hoddesdon Town Centre	123.9	140.5	136.2	10.0	-3.1	136.1	9.9	-3.1
Cheshunt Old Pond District Centre	40.6	52.8	51.7	27.4	-2.1	51.7	27.3	-2.2
Centres Outside Borough								
Harlow Town Centre	358.6	561.5	538.6	50.2	-4.1	537.0	49.8	-4.3
Enfield Town Centre	211.1	317.9	304.4	44.2	-4.2	303.6	43.8	-4.5
Welwyn Garden City Town Centre	294.9	355.8	343.7	16.5	-3.4	342.9	16.3	-3.6
Hertford Town Centre	106.9	136.0	132.0	23.5	-2.9	131.8	23.2	-3.1
Hatfield Town Centre	106.9	137.5	135.6	26.8	-1.3	135.5	26.7	-1.4
Stevenage Town Centre	167.8	208.3	205.7	22.5	-1.3	205.5	22.4	-1.4

Notes:
[1] & [2] Combined Retail Turnovers derived from Tables 3, 4, 5 & 6
[3] Derived from Tables 11a and 12
[4] = ([3]-[1])/[1]%
[5] = ([3]-[2])/[2]%
[6] Comparison goods turnover of extension asssessed to be £8.4m (retail warehouse sales density of £4,300/sq m applied to 1,957sq m net floorspace (assuming 80/20 gross/net split)).
Assumed same trade diversion patterns as comparison goods floorspace of new Proposed Brookfield scheme
[7] = ([6]-[1])/[1]%
[8] = ([6]-[2])/[2]%
Figures may not add due to rounding

2012 Prices

Table 13b: Potential Trading Effects of Prlanned Brookfield, 2024 (Medium Comparison Goods Sales Density Scenario)

Destination	Total Combined Retail Turnover		Residual Combined Total Turnover after Planned Brookfield, 2024 (£m)	Impact of New Floorspace		Residual Combined Total Turnover after Planned Brookfield & Retail Park Commitment, 2024 (£m)	Cumulative Impact	
	2016 (£m)	2024 (£m)		Change in Turnover 2016-2024 (%)	Impact on 2024 Turnover (%)		Change in Turnover 2016-2024 (%)	Impact on 2024 Turnover (%)
	[1]	[2]	[3]	[4]	[5]	[6]	[7]	[8]
Centres Inside Borough								
Waltham Cross Town Centre	101.9	130.6	124.3	21.9	-4.8	124.0	21.7	-5.0
Hoddesdon Town Centre	123.9	140.5	136.0	9.8	-3.2	135.9	9.7	-3.3
Cheshunt Old Pond District Centre	40.6	52.8	51.6	27.0	-2.3	51.5	26.9	-2.4
Centres Outside Borough								
Harlow Town Centre	358.6	561.5	533.5	48.8	-5.0	532.0	48.4	-5.2
Enfield Town Centre	211.1	317.9	301.5	42.8	-5.1	300.6	42.4	-5.4
Welwyn Garden City Town Centre	294.9	355.8	341.0	15.6	-4.2	340.2	15.3	-4.4
Hertford Town Centre	106.9	136.0	131.2	22.7	-3.5	131.0	22.5	-3.7
Hatfield Town Centre	106.9	137.5	135.2	26.5	-1.6	135.1	26.4	-1.7
Stevenage Town Centre	167.8	208.3	205.1	22.2	-1.6	204.9	22.1	-1.6

Notes:
[1] & [2] Combined Retail Turnovers derived from Tables 3, 4, 5 & 6
[3] Derived from Tables 11b and 12
[4] = ([3]-[1])/[1]%
[5] = ([3]-[2])/[2]%
[6] Comparison goods turnover of extension asssessed to be £8.4m (retail warehouse sales density of £4,300/sq m applied to 1,957sq m net floorspace (assuming 80/20 gross/net split)).
Assumed same trade diversion patterns as comparison goods floorspace of new Proposed Brookfield scheme
[7] = ([6]-[1])/[1]%
[8] = ([6]-[2])/[2]%
Figures may not add due to rounding

2012 Prices

Table 13c: Potential Trading Effects of Planned Brookfield, 2024 (High Comparison Goods Sales Density Scenario)

Destination	Total Combined Retail Turnover 2016 (£m)	Total Combined Retail Turnover 2024 (£m)	Residual Combined Total Turnover after Planned Brookfield, 2024 (£m)	Impact of New Floorspace: Change in Turnover 2016-2024 (%)	Impact of New Floorspace: Impact on 2024 Turnover (%)	Residual Combined Total Turnover after Planned Brookfield & Retail Park Commitment, 2024 (£m)	Cumulative Impact: Change in Turnover 2016-2024 (%)	Cumulative Impact: Impact on 2024 Turnover (%)
	[1]	[2]	[3]	[4]	[5]	[6]	[7]	[8]
Centres Inside Borough								
Waltham Cross Town Centre	101.9	130.6	123.8	21.5	-5.2	123.5	21.2	-5.4
Hoddesdon Town Centre	123.9	140.5	135.9	9.7	-3.3	135.8	9.7	-3.3
Cheshunt Old Pond District Centre	40.6	52.8	51.5	26.8	-2.5	51.4	26.7	-2.6
Centres Outside Borough								
Harlow Town Centre	358.6	561.5	531.0	48.1	-5.4	529.5	47.7	-5.7
Enfield Town Centre	211.1	317.9	300.0	42.1	-5.6	299.2	41.7	-5.9
Welwyn Garden City Town Centre	294.9	355.8	339.6	15.2	-4.6	338.8	14.9	-4.8
Hertford Town Centre	106.9	136.0	130.8	22.3	-3.8	130.6	22.1	-4.0
Hatfield Town Centre	106.9	137.5	135.1	26.3	-1.7	134.9	26.2	-1.8
Stevenage Town Centre	167.8	208.3	204.8	22.0	-1.7	204.6	21.9	-1.8

Notes:

[1] & [2] Combined Retail Turnovers derived from Tables 3, 4, 5 & 6
[3] Derived from Tables 11c and 12
[4] = ([3]-[1])/[1]%
[5] = ([3]-[2])/[2]%
[6] Comparison goods turnover of extension asssessed to be £8.4m (retail warehouse sales density of £4,300/sq m applied to 1,957sq m net floorspace (assuming 80/20 gross/net split)).
Assumed same trade diversion patterns as comparison goods floorspace of new Proposed Brookfield scheme
[7] = ([6]-[1])/[1]%
[8] = ([6]-[2])/[2]%
Figures may not add due to rounding

2012 Prices

Appendix D
Statistical Retail Impact Sensitivity Testing

COMPARISON GOODS FLOORSPACE SCENARIO IMPACT TESTING

Table A: Proposed Comparison Goods Floorspace - Brookfield, 2024

	Net Floorspace (sq m)	Average Sales Density (£/sq m)	Turnover (£m)
	[1]	**[2]**	**[3]**
Scenario Impact Test 1: Retail Capacity Study Floorspace (Uplift in Market Share)			
a - Low sales density		4,500	103.5
b - Medium sales density	23,000	5,500	126.5
c - High sales density		6,000	138.0
Scenario Impact Test 2: Previous Core Strategy Floorspace (Tested in July 2010 Core Strategy Bridging Report)			
a - Low sales density		4,500	157.5
b - Medium sales density	35,000	5,500	192.5
c - High sales density		6,000	210.0

Table B: Proposed Convenience Goods Floorspace - Brookfield, 2024

	Net Floorspace (sq m)	Average Sales Density (£/sq m)	Turnover (£m)
	[1]	**[2]**	**[3]**
Foodstore	3,000	12,000	36.0

Notes:
[3] = [1] x [2] /1000000

2012 Prices

COMPARISON GOODS FLOORSPACE SCENARIO IMPACT TESTING

Table C: Brookfield Comparison Goods Trade Draw, 2024

		Zone													Total Zones 1-13	Beyond Study Area	Total
		1	2	3	4	5	6	7	8	9	10	11	12	13			
[1]	Brookfield's Existing Market Share (%)	16	28	28	31	3	10	12	5	14	5	10	14	1	12	-	-
[2]	Existing Retail Facilities - Brookfield Turnover (£m), 2024	13.9	21.0	23.9	37.9	1.5	13.0	17.2	13.0	10.6	2.7	14.0	13.5	1.9	184.0	9.2	193.2
[3]	Brookfield's Existing Trade Draw by Zone (%)	7	11	12	20	1	7	9	7	6	1	7	7	1	95	5	100
[4]	New Scheme Trade Draw by Zones (%), 2024	7	11	12	20	1	7	9	7	6	1	7	7	1	95	5	100
Scenario Impact Test 1 - Retail Capacity Study Floorspace - Uplift in Market Share																	
[5a]	New Scheme Trade Draw by Zones (£m), 2024 - (a) Low Sales Density	7.4	11.2	12.8	20.3	0.8	7.0	9.2	7.0	5.7	1.4	7.5	7.2	1.0	98.6	4.9	103.5
[5b]	New Scheme Trade Draw by Zones (£m), 2024 - (b) Medium Sales Density	9.1	13.7	15.6	24.8	1.0	8.5	11.3	8.5	7.0	1.8	9.2	8.8	1.2	120.5	6.0	126.5
[5c]	New Scheme Trade Draw by Zones (£m), 2024 - (C) High Sales Density	9.9	15.0	17.1	27.1	1.1	9.3	12.3	9.3	7.6	1.9	10.0	9.6	1.4	131.4	6.6	138.0
Scenario Impact Test 2: Previous Core Strategy Floorspace (Tested in July 2010 Core Strategy Bridging Report)																	
[6a]	New Scheme Trade Draw by Zones (£m), 2024 - (a) Low Sales Density	11.3	17.1	19.5	30.9	1.2	10.6	14.0	10.6	8.7	2.2	11.4	11.0	1.5	150.0	7.5	157.5
[6b]	New Scheme Trade Draw by Zones (£m), 2024 - (b) Medium Sales Density	13.8	20.9	23.8	37.7	1.5	12.9	17.1	12.9	10.6	2.7	14.0	13.4	1.9	183.3	9.2	192.5
[6c]	New Scheme Trade Draw by Zones (£m), 2024 - (C) High Sales Density	15.1	22.8	26.0	41.2	1.7	14.1	18.7	14.1	11.6	2.9	15.2	14.7	2.1	200.0	10.0	210.0

Notes:

[1] Taken from Table 1
[2] Taken from Table 4
[3] Derived from [2]
[4] Assessed new Brookfield scheme would have same zonal trade draw patterns as existing retail facilities within Brookfield
[5] Total turnovers derived from Table A
[6] Total turnovers derived from Table A

2012 Prices

COMPARISON GOODS FLOORSPACE SCENARIO IMPACT TESTING
Scenario Impact Test 1 - Retail Capacity Study Floorspace - Uplift in Market Share

Table Di: Comparison Goods Expenditure, 2024 - With Brookfield Development (Low Sales Density Scenario)

Destination	Zone													Total Study Area	Trade from Beyond Study Area	Total Turnover
	1 (£m)	2 (£m)	3 (£m)	4 (£m)	5 (£m)	6 (£m)	7 (£m)	8 (£m)	9 (£m)	10 (£m)	11 (£m)	12 (£m)	13 (£m)	(£m)	(£m)	(£m)
Brookfield	20.2	28.8	32.3	52.5	2.3	18.5	25.4	19.3	15.5	4.1	21.2	20.1	2.9	263.2	14.7	277.9
Waltham Cross Town Centre	0.8	6.4	6.8	23.8	1.6	15.2	9.2	12.9	7.4	1.3	1.1	2.5		89.1	4.3	93.4
Hoddesdon Town Centre	20.6	5.9	1.6	3.9	0.3		1.3		0.0	0.1	1.3	4.0		39.0	1.4	40.4
Cheshunt Old Pond District Centre	2.7	4.2	8.4	4.6	1.4	2.9			3.8	1.7	3.4	1.8	0.6	35.5	1.8	37.3
Other within Broxbourne	0.1	2.0	1.8	1.0	0.5		2.0	2.0	0.1	0.2		0.3		10.0		10.0
Sub Total Borough of Broxbourne	**44.4**	**47.3**	**50.9**	**85.8**	**6.1**	**36.6**	**37.9**	**34.1**	**26.8**	**7.4**	**26.9**	**28.8**	**3.5**	**436.7**	**16.2**	**452.9**
Harlow Town Centre	15.1	10.2	3.5	3.1	31.9	6.1	1.4		1.3	3.4	20.1	14.8	97.3	208.2	252.6	460.9
Harlow Retail Parks/Foodstores	9.6	3.2	3.2	0.7	11.3	2.9	0.6			2.5	9.5	8.1	43.7	95.2		
Enfield Town Centre	1.9	1.2	3.4	8.2	0.1	5.3	61.1	94.0	2.8	2.4	0.4	8.3	2.4	191.4	49.4	240.9
Enfield Retail Parks/Foodstores	1.1	4.8	4.1	5.0		6.0	29.8	44.7	0.7	0.2	0.6		0.2	97.1		
Welwyn Garden City Town Centre	4.6	1.6	5.0	3.4	1.3	2.1		8.3	26.9	17.1	14.8	6.3		91.4	208.1	299.5
Hertford Town Centre	1.7	0.3	1.1	0.6		0.5	0.3			6.6	21.0	6.7		38.7	12.1	50.8
Hertford Retail Parks/Foodstores	0.2									0.4	4.1	1.1		5.8		
Hatfield Town Centre	1.5	0.3	1.1	0.2				1.4	2.4	0.9	2.8	0.6	3.1	14.4	64.6	79.0
Hatfield Retail Parks/Foodstores		0.1	0.1						0.8	0.3	1.7			3.0		
Stevenage Town Centre	0.7	0.2	0.1	0.1				1.4	0.4	1.2	14.9	4.3		23.4	103.7	127.2
Stevenage Retail Parks/Foodstores	0.7	0.3	4.0	2.1		15.0			0.3	0.7	3.1	2.0		28.2		28.2
Ware Town Centre			0.1				0.1				13.4	1.3		15.2	10.1	25.3
Lakeside Shopping Centre	2.0	0.7	0.3	1.3	0.9	2.6	1.4			0.4		4.5	12.6	26.6		26.4
Bluewater Shopping Centre			0.3	0.3	0.2	2.1		5.0		0.2				8.1		7.9
Other (including Central London)	2.6	4.1	8.7	10.1	2.7	45.7	14.7	47.6	15.5	9.4	13.4	8.9	16.2	199.5		199.0
Total	**86.1**	**74.2**	**85.9**	**121.0**	**54.4**	**125.0**	**147.3**	**236.5**	**77.9**	**53.1**	**146.7**	**95.6**	**178.9**	**1,468**		

Notes:
Assessed new Brookfield scheme would have same zonal trade draw patterns as existing retail facilities within Brookfield (see Table C)
Trade draw within each zone has been assessed having regard to the existing shopping patterns and location of existing retail facilities
Figures may not add due to rounding

2012 Prices

COMPARISON GOODS FLOORSPACE SCENARIO IMPACT TESTING
Scenario Impact Test 1 - Retail Capacity Study Floorspace - Uplift in Market Share

Table Dii: Comparison Goods Expenditure, 2024 - With Brookfield Development (Medium Sales Density Scenario)

Destination	Zone													Total Study Area	Trade from Beyond Study Area	Total Turnover
	1 (£m)	2 (£m)	3 (£m)	4 (£m)	5 (£m)	6 (£m)	7 (£m)	8 (£m)	9 (£m)	10 (£m)	11 (£m)	12 (£m)	13 (£m)	(£m)	(£m)	(£m)
Brookfield	21.6	30.6	34.2	55.7	2.5	19.8	27.3	20.6	16.6	4.4	22.8	21.6	3.1	280.8	14.6	295.4
Waltham Cross Town Centre	0.8	6.3	6.8	23.5	1.6	15.1	9.1	12.9	7.3	1.3	1.1	2.5		88.3	4.3	92.6
Hoddesdon Town Centre	20.5	5.9	1.6	3.9	0.3		1.3		0.0	0.1	1.3	4.0		38.8	1.4	40.3
Cheshunt Old Pond District Centre	2.7	4.1	8.3	4.6	1.4	2.9			3.8	1.7	3.4	1.8	0.6	35.3	1.8	37.1
Other within Broxbourne	0.1	2.0	1.8	1.0	0.5		2.0	2.0	0.1	0.2		0.3		10.0		10.0
Sub Total Borough of Broxbourne	**45.7**	**48.9**	**52.7**	**88.7**	**6.2**	**37.8**	**39.7**	**35.5**	**27.8**	**7.7**	**28.5**	**30.3**	**3.7**	**453.2**	**16.1**	**469.3**
Harlow Town Centre	14.4	9.3	3.2	2.5	31.8	5.9	1.2		1.2	3.4	19.8	14.3	97.1	204.3	252.5	456.7
Harlow Retail Parks/Foodstores	9.4	3.1	3.0	0.7	11.3	2.8	0.5			2.5	9.3	7.9	43.6	94.2		
Enfield Town Centre	1.9	1.2	3.2	7.7	0.1	5.3	60.4	93.5	2.7	2.4	0.4	8.1	2.4	189.2	49.3	238.5
Enfield Retail Parks/Foodstores	1.0	4.7	4.0	4.5		5.9	29.4	44.4	0.7	0.2	0.6		0.2	95.5		
Welwyn Garden City Town Centre	4.5	1.5	4.6	3.0	1.3	2.1		8.2	26.4	17.0	14.6	6.2		89.3	208.0	297.3
Hertford Town Centre	1.7	0.2	1.1	0.6		0.5	0.3			6.5	20.7	6.5		38.1	12.0	50.2
Hertford Retail Parks/Foodstores	0.1									0.4	4.1	1.1		5.7		
Hatfield Town Centre	1.5	0.3	1.1	0.2				1.4	2.3	0.9	2.7	0.6	3.1	14.1	64.5	78.7
Hatfield Retail Parks/Foodstores		0.1	0.1						0.8	0.3	1.7			2.9		
Stevenage Town Centre	0.7	0.2	0.1	0.1				1.4	0.4	1.2	14.7	4.3		23.0	103.7	126.7
Stevenage Retail Parks/Foodstores	0.7	0.3	3.9	2.1		14.9			0.3	0.7	3.1	1.9		27.8		27.8
Ware Town Centre			0.1				0.1				13.3	1.2		15.2	10.1	25.3
Lakeside Shopping Centre	1.9	0.6	0.3	1.2	0.9	2.6	1.3			0.4		4.4	12.6	26.1		25.9
Bluewater Shopping Centre			0.3	0.3	0.2	2.1		4.9		0.2				7.9		7.7
Other (including Central London)	2.5	3.9	8.2	9.4	2.7	45.3	14.3	47.3	15.3	9.4	13.3	8.8	16.2	196.5		195.9
Total	**86.1**	**74.2**	**85.9**	**121.0**	**54.4**	**125.0**	**147.3**	**236.5**	**77.9**	**53.1**	**146.7**	**95.6**	**178.9**	**1,468**		

Notes:
Assessed new Brookfield scheme would have same zonal trade draw patterns as existing retail facilities within Brookfield (see Table C)
Trade draw within each zone has been assessed having regard to the existing shopping patterns and location of existing retail facilities
Figures may not add due to rounding

2012 Prices

COMPARISON GOODS FLOORSPACE SCENARIO IMPACT TESTING
Scenario Impact Test 1 - Retail Capacity Study Floorspace - Uplift in Market Share

Table Diii: Comparison Goods Expenditure, 2024 - With Brookfield Development (High Sales Density Scenario)

Destination	Zone													Total Study Area	Trade from Beyond Study Area	Total Turnover
	1 (£m)	2 (£m)	3 (£m)	4 (£m)	5 (£m)	6 (£m)	7 (£m)	8 (£m)	9 (£m)	10 (£m)	11 (£m)	12 (£m)	13 (£m)	(£m)	(£m)	(£m)
Brookfield	22.3	31.5	35.2	57.4	2.6	20.4	28.2	21.3	17.1	4.5	23.5	22.3	3.2	289.6	14.6	304.2
Waltham Cross Town Centre	0.8	6.2	6.7	23.3	1.6	15.1	9.1	12.9	7.3	1.3	1.1	2.5		87.9	4.3	92.2
Hoddesdon Town Centre	20.4	5.9	1.6	3.9	0.3		1.3		0.0	0.1	1.3	4.0		38.8	1.4	40.2
Cheshunt Old Pond District Centre	2.7	4.1	8.3	4.6	1.4	2.9			3.8	1.7	3.4	1.8	0.6	35.3	1.8	37.1
Other within Broxbourne	0.1	1.9	1.8	1.0	0.5		2.0	2.0	0.1	0.2		0.3		9.9		9.9
Sub Total Borough of Broxbourne	**46.4**	**49.6**	**53.6**	**90.1**	**6.3**	**38.4**	**40.6**	**36.2**	**28.4**	**7.9**	**29.3**	**31.0**	**3.8**	**461.5**	**16.1**	**477.5**
Harlow Town Centre	14.1	8.9	3.1	2.2	31.7	5.8	1.1		1.2	3.4	19.7	14.0	97.1	202.3	252.4	454.7
Harlow Retail Parks/Foodstores	9.3	3.0	3.0	0.6	11.3	2.8	0.5			2.5	9.2	7.9	43.6	93.7		
Enfield Town Centre	1.8	1.1	3.1	7.5	0.1	5.2	60.0	93.3	2.6	2.4	0.4	8.1	2.4	188.1	49.2	237.2
Enfield Retail Parks/Foodstores	1.0	4.6	3.9	4.3		5.9	29.2	44.3	0.7	0.2	0.6		0.2	94.7		
Welwyn Garden City Town Centre	4.4	1.5	4.4	2.8	1.3	2.1		8.1	26.1	16.9	14.5	6.2		88.2	208.0	296.2
Hertford Town Centre	1.7	0.2	1.0	0.6		0.5	0.3			6.5	20.6	6.4		37.8	12.0	49.8
Hertford Retail Parks/Foodstores	0.1									0.4	4.0	1.1		5.6		
Hatfield Town Centre	1.5	0.2	1.1	0.2				1.4	2.3	0.9	2.7	0.6	3.1	14.0	64.5	78.5
Hatfield Retail Parks/Foodstores		0.1	0.1						0.8	0.3	1.6			2.9		
Stevenage Town Centre	0.6	0.2	0.1	0.1				1.4	0.4	1.2	14.6	4.3		22.8	103.6	126.5
Stevenage Retail Parks/Foodstores	0.7	0.3	3.8	2.0		14.8			0.3	0.7	3.1	1.9		27.6		27.6
Ware Town Centre			0.1				0.1				13.2	1.2		15.2	10.1	25.3
Lakeside Shopping Centre	1.9	0.6	0.3	1.2	0.9	2.6	1.2			0.4		4.3	12.6	25.8		25.6
Bluewater Shopping Centre			0.3	0.3	0.2	2.1		4.8		0.2				7.8		7.6
Other (including Central London)	2.5	3.9	8.0	9.1	2.7	45.0	14.2	47.1	15.2	9.3	13.2	8.7	16.2	195.0		194.4
Total	**86.1**	**74.2**	**85.9**	**121.0**	**54.4**	**125.0**	**147.3**	**236.5**	**77.9**	**53.1**	**146.7**	**95.6**	**178.9**	1,468		

Notes:
Assessed new Brookfield scheme would have same zonal trade draw patterns as existing retail facilities within Brookfield (see Table C)
Trade draw within each zone has been assessed having regard to the existing shopping patterns and location of existing retail facilities
Figures may not add due to rounding

2012 Prices

COMPARISON GOODS FLOORSPACE SCENARIO IMPACT TESTING
Scenario Impact Test 1 - Retail Capacity Study Floorspace - Uplift in Market Share

Table Ei: Potential Trading Effects of Planned Brookfield, 2024 (Low Comparison Goods Sales Density Scenario)

Destination	Total Combined Retail Turnover		Residual Combined Total Turnover after Planned Brookfield, 2024 (£m)	Impact of New Floorspace		Residual Combined Total Turnover after Planned Brookfield & Retail Park Commitment, 2024 (£m)	Cumulative Impact	
	2016 (£m)	2024 (£m)		Change in Turnover 2016-2024 (%)	Impact on 2024 Turnover (%)		Change in Turnover 2016-2024 (%)	Impact on 2024 Turnover (%)
	[1]	[2]	[3]	[4]	[5]	[6]	[7]	[8]
Centres Inside Borough								
Waltham Cross Town Centre	107.5	130.6	126.0	17.2	-3.5	125.7	16.9	-3.7
Hoddesdon Town Centre	128.6	140.5	136.4	6.1	-3.0	136.3	6.0	-3.0
Cheshunt Old Pond District Centre	43.9	52.8	51.8	17.9	-1.8	51.8	17.8	-1.9
Centres Outside Borough								
Harlow Town Centre	358.6	533.4	514.5	43.5	-3.5	513.0	43.1	-3.8
Enfield Town Centre	211.1	293.4	282.4	33.7	-3.8	281.5	33.3	-4.1
Welwyn Garden City Town Centre	294.9	355.7	345.7	17.2	-2.8	344.9	17.0	-3.0
Hertford Town Centre	106.9	126.1	122.8	14.8	-2.6	122.5	14.6	-2.8
Hatfield Town Centre	106.9	136.7	135.1	26.4	-1.1	135.0	26.3	-1.2
Stevenage Town Centre	167.8	204.4	202.2	20.5	-1.1	202.0	20.4	-1.2
Ware Town Centre	66.8	77.8	76.3	14.4	-1.8	76.3	14.4	-1.8

Notes:
[1] & [2] Combined Retail Turnovers derived from Tables 3, 4, 5 & 6
[3] Derived from Tables Di and 12
[4] = ([3]-[1])/[1]%
[5] = ([3]-[2])/[2]%
[6] Comparison goods turnover of extension asssessed to be £8.4m (retail warehouse sales density of £4,300/sq m applied to 1,957sq m net floorspace (assuming 80/20 gross/net split)).
Assumed same trade diversion patterns as comparison goods floorspace of new Proposed Brookfield scheme
[7] = ([6]-[1])/[1]%
[8] = ([6]-[2])/[2]%
Figures may not add due to rounding

2012 Prices

COMPARISON GOODS FLOORSPACE SCENARIO IMPACT TESTING
Scenario Impact Test 1 - Retail Capacity Study Floorspace - Uplift in Market Share

Table Eii: Potential Trading Effects of Planned Brookfield, 2024 (Medium Comparison Goods Sales Density Scenario)

Destination	Total Combined Retail Turnover		Residual Combined Total Turnover after Planned Brookfield, 2024 (£m)	Impact of New Floorspace		Residual Combined Total Turnover after Planned Brookfield & Retail Park Commitment, 2024 (£m)	Cumulative Impact	
	2016 (£m)	2024 (£m)		Change in Turnover 2016-2024 (%)	Impact on 2024 Turnover (%)		Change in Turnover 2016-2024 (%)	Impact on 2024 Turnover (%)
	[1]	[2]	[3]	[4]	[5]	[6]	[7]	[8]
Centres Inside Borough								
Waltham Cross Town Centre	107.5	130.6	125.2	16.4	-4.1	124.9	16.2	-4.3
Hoddesdon Town Centre	128.6	140.5	136.2	5.9	-3.1	136.1	5.9	-3.1
Cheshunt Old Pond District Centre	43.9	52.8	51.7	17.7	-2.1	51.7	17.6	-2.2
Centres Outside Borough								
Harlow Town Centre	358.6	533.4	510.4	42.3	-4.3	508.9	41.9	-4.6
Enfield Town Centre	211.1	293.4	279.9	32.6	-4.6	279.1	32.2	-4.9
Welwyn Garden City Town Centre	294.9	355.7	343.5	16.5	-3.4	342.7	16.2	-3.7
Hertford Town Centre	106.9	126.1	122.1	14.2	-3.2	121.9	14.0	-3.4
Hatfield Town Centre	106.9	136.7	134.8	26.1	-1.4	134.7	26.0	-1.4
Stevenage Town Centre	167.8	204.4	201.7	20.2	-1.3	201.6	20.1	-1.4
Ware Town Centre	66.8	77.8	76.2	14.1	-2.0	76.2	14.1	-2.0

Notes:
[1] & [2] Combined Retail Turnovers derived from Tables 3, 4, 5 & 6
[3] Derived from Tables Dii and 12
[4] = ([3]-[1])/[1]%
[5] = ([3]-[2])/[2]%
[6] Comparison goods turnover of extension asssessed to be £8.4m (retail warehouse sales density of £4,300/sq m applied to 1,957sq m net floorspace (assuming 80/20 gross/net split)).
Assumed same trade diversion patterns as comparison goods floorspace of new Proposed Brookfield scheme
[7] = ([6]-[1])/[1]%
[8] = ([6]-[2])/[2]%
Figures may not add due to rounding

2012 Prices

COMPARISON GOODS FLOORSPACE SCENARIO IMPACT TESTING
Scenario Impact Test 1 - Retail Capacity Study Floorspace - Uplift in Market Share

Table Eiii: Potential Trading Effects of Planned Brookfield, 2024 (High Comparison Goods Sales Density Scenario)

Destination	Total Combined Retail Turnover		Residual Combined Total Turnover after Planned Brookfield, 2024 (£m)	Impact of New Floorspace		Residual Combined Total Turnover after Planned Brookfield & Retail Park Commitment, 2024 (£m)	Cumulative Impact	
	2016 (£m)	2024 (£m)		Change in Turnover 2016-2024 (%)	Impact on 2024 Turnover (%)		Change in Turnover 2016-2024 (%)	Impact on 2024 Turnover (%)
	[1]	[2]	[3]	[4]	[5]	[6]	[7]	[8]
Centres Inside Borough								
Waltham Cross Town Centre	107.5	130.6	124.8	16.1	-4.4	124.6	15.8	-4.6
Hoddesdon Town Centre	128.6	140.5	136.1	5.9	-3.1	136.1	5.8	-3.2
Cheshunt Old Pond District Centre	43.9	52.8	51.6	17.5	-2.2	51.6	17.4	-2.3
Centres Outside Borough								
Harlow Town Centre	358.6	533.4	508.3	41.8	-4.7	506.8	41.3	-5.0
Enfield Town Centre	211.1	293.4	278.7	32.0	-5.0	277.9	31.6	-5.3
Welwyn Garden City Town Centre	294.9	355.7	342.4	16.1	-3.7	341.6	15.8	-4.0
Hertford Town Centre	106.9	126.1	121.8	13.9	-3.4	121.5	13.7	-3.6
Hatfield Town Centre	106.9	136.7	134.7	25.9	-1.5	134.6	25.8	-1.5
Stevenage Town Centre	167.8	204.4	201.5	20.1	-1.4	201.3	20.0	-1.5
Ware Town Centre	66.8	77.8	76.1	14.0	-2.1	76.1	14.0	-2.1

Notes:
[1] & [2] Combined Retail Turnovers derived from Tables 3, 4, 5 & 6
[3] Derived from Tables Diii and 12
[4] = ([3]-[1])/[1]%
[5] = ([3]-[2])/[2]%
[6] Comparison goods turnover of extension asssessed to be £8.4m (retail warehouse sales density of £4,300/sq m applied to 1,957sq m net floorspace (assuming 80/20 gross/net split)).
Assumed same trade diversion patterns as comparison goods floorspace of new Proposed Brookfield scheme
[7] = ([6]-[1])/[1]%
[8] = ([6]-[2])/[2]%
Figures may not add due to rounding

2012 Prices

COMPARISON GOODS FLOORSPACE SCENARIO IMPACT TESTING

Scenario Impact Test 2: Previous Core Strategy Floorspace (Tested in July 2010 Core Strategy Bridging Report)

Table Fi: Comparison Goods Expenditure, 2024 - With Brookfield Development (Low Sales Density Scenario)

Destination	Zone													Total Study Area (£m)	Trade from Beyond Study Area (£m)	Total Turnover (£m)
	1 (£m)	2 (£m)	3 (£m)	4 (£m)	5 (£m)	6 (£m)	7 (£m)	8 (£m)	9 (£m)	10 (£m)	11 (£m)	12 (£m)	13 (£m)			
Brookfield	23.5	32.9	36.7	60.1	2.8	21.4	29.7	22.5	18.0	4.8	24.9	23.6	3.4	304.5	14.5	319.0
Waltham Cross Town Centre	0.8	6.1	6.7	23.0	1.6	15.0	9.1	12.8	7.3	1.3	1.1	2.5		87.3	4.3	91.5
Hoddesdon Town Centre	20.4	5.8	1.6	3.9	0.3		1.3		0.0	0.1	1.3	4.0		38.6	1.4	40.0
Cheshunt Old Pond District Centre	2.7	4.1	8.3	4.6	1.4	2.9			3.8	1.7	3.4	1.8	0.6	35.2	1.8	37.0
Other within Broxbourne	0.1	1.9	1.8	1.0	0.5		2.0	1.9	0.1	0.2		0.3		9.9		9.9
Sub Total Borough of Broxbourne	**47.5**	**50.9**	**55.1**	**92.6**	**6.5**	**39.3**	**42.1**	**37.3**	**29.2**	**8.1**	**30.6**	**32.2**	**4.0**	**475.5**	**16.0**	**491.5**
Harlow Town Centre	13.6	8.1	2.9	1.7	31.6	5.6	0.9		1.1	3.4	19.5	13.6	96.9	199.0	252.2	451.2
Harlow Retail Parks/Foodstores	9.2	2.9	2.9	0.5	11.2	2.7	0.5			2.4	9.1	7.8	43.5	92.8		
Enfield Town Centre	1.8	1.1	3.0	7.1	0.1	5.2	59.4	92.9	2.5	2.4	0.4	8.0	2.4	186.2	49.0	235.2
Enfield Retail Parks/Foodstores	1.0	4.5	3.8	4.0		5.8	28.8	44.0	0.6	0.2	0.6		0.2	93.4		
Welwyn Garden City Town Centre	4.3	1.5	4.0	2.4	1.3	2.0		8.0	25.7	16.8	14.3	6.0		86.4	207.9	294.3
Hertford Town Centre	1.7	0.2	1.0	0.6		0.5	0.3			6.5	20.3	6.2		37.3	12.0	49.3
Hertford Retail Parks/Foodstores	0.1									0.4	4.0	1.1		5.6		
Hatfield Town Centre	1.5	0.2	1.0	0.2				1.3	2.2	0.9	2.7	0.6	3.1	13.8	64.5	78.3
Hatfield Retail Parks/Foodstores		0.1	0.1						0.8	0.3	1.6			2.8		
Stevenage Town Centre	0.6	0.2	0.1	0.1				1.3	0.4	1.2	14.4	4.2		22.5	103.6	126.1
Stevenage Retail Parks/Foodstores	0.7	0.3	3.7	2.0		14.7			0.3	0.7	3.0	1.9		27.3		27.3
Ware Town Centre			0.1				0.1				13.1	1.2		15.2	10.1	25.3
Lakeside Shopping Centre	1.8	0.5	0.3	1.1	0.9	2.5	1.1			0.4		4.2	12.6	25.4		25.2
Bluewater Shopping Centre			0.2	0.3	0.2	2.0		4.8		0.2				7.6		7.4
Other (including Central London)	2.4	3.8	7.7	8.5	2.7	44.6	13.9	46.9	15.0	9.3	13.1	8.6	16.2	192.6		191.8
Total	**86.1**	**74.2**	**85.9**	**121.0**	**54.4**	**125.0**	**147.3**	**236.5**	**77.9**	**53.1**	**146.7**	**95.6**	**178.9**	**1,468**		

Notes:

Assessed new Brookfield scheme would have same zonal trade draw patterns as existing retail facilities within Brookfield (see Table C)

Trade draw within each zone has been assessed having regard to the existing shopping patterns and location of existing retail facilities

Figures may not add due to rounding

2012 Prices

COMPARISON GOODS FLOORSPACE SCENARIO IMPACT TESTING
Scenario Impact Test 2: Previous Core Strategy Floorspace (Tested in July 2010 Core Strategy Bridging Report)

Table Fii: Comparison Goods Expenditure, 2024 - With Brookfield Development (Medium Sales Density Scenario)

Destination	Zone													Total Study Area	Trade from Beyond Study Area	Total Turnover
	1 (£m)	2 (£m)	3 (£m)	4 (£m)	5 (£m)	6 (£m)	7 (£m)	8 (£m)	9 (£m)	10 (£m)	11 (£m)	12 (£m)	13 (£m)	(£m)	(£m)	(£m)
Brookfield	25.6	35.6	39.6	65.0	3.0	23.3	32.5	24.6	19.7	5.3	27.3	25.8	3.8	331.3	14.3	345.6
Waltham Cross Town Centre	0.8	5.8	6.6	22.5	1.6	15.0	9.0	12.8	7.2	1.3	1.1	2.5		86.1	4.3	90.4
Hoddesdon Town Centre	20.2	5.8	1.6	3.8	0.3		1.3		0.0	0.1	1.3	3.9		38.4	1.4	39.8
Cheshunt Old Pond District Centre	2.7	4.1	8.2	4.5	1.4	2.9			3.7	1.7	3.4	1.8	0.6	35.0	1.8	36.8
Other within Broxbourne	0.1	1.9	1.8	1.0	0.5		2.0	1.9	0.1	0.2		0.3		9.9		9.9
Sub Total Borough of Broxbourne	**49.5**	**53.2**	**57.8**	**96.9**	**6.7**	**41.1**	**44.8**	**39.4**	**30.8**	**8.6**	**33.0**	**34.4**	**4.3**	**500.6**	**15.8**	**516.4**
Harlow Town Centre	12.6	6.7	2.5	0.8	31.4	5.2	0.6		1.0	3.3	19.1	12.8	96.7	193.0	252.0	444.9
Harlow Retail Parks/Foodstores	8.9	2.7	2.6	0.4	11.2	2.7	0.5			2.4	8.9	7.6	43.4	91.2		
Enfield Town Centre	1.8	1.0	2.7	6.3	0.1	5.1	58.3	92.2	2.4	2.4	0.4	7.8	2.4	182.7	48.8	231.5
Enfield Retail Parks/Foodstores	1.0	4.3	3.6	3.3		5.6	28.2	43.5	0.6	0.2	0.6		0.2	91.1		
Welwyn Garden City Town Centre	4.1	1.4	3.4	1.8	1.3	2.0		7.8	24.9	16.6	14.0	5.9		83.2	207.7	290.9
Hertford Town Centre	1.6	0.2	1.0	0.6		0.5	0.3			6.4	19.9	5.9		36.4	11.9	48.3
Hertford Retail Parks/Foodstores	0.1									0.4	3.9	1.1		5.4		
Hatfield Town Centre	1.4	0.2	1.0	0.2				1.3	2.0	0.9	2.6	0.6	3.1	13.4	64.4	77.8
Hatfield Retail Parks/Foodstores		0.1	0.1						0.8	0.3	1.6			2.8		
Stevenage Town Centre	0.5	0.2	0.0	0.0				1.3	0.3	1.2	14.1	4.2		21.8	103.5	125.3
Stevenage Retail Parks/Foodstores	0.7	0.2	3.5	1.9		14.4			0.3	0.6	2.9	1.9		26.6		26.6
Ware Town Centre			0.1				0.1				12.9	1.2		15.2	10.0	25.2
Lakeside Shopping Centre	1.7	0.4	0.3	1.0	0.9	2.4	1.0			0.4		4.0	12.5	24.6		24.3
Bluewater Shopping Centre			0.2	0.2	0.2	2.0		4.6		0.2				7.3		7.0
Other (including Central London)	2.3	3.6	7.0	7.5	2.6	43.9	13.4	46.4	14.7	9.2	12.9	8.3	16.2	188.1		187.2
Total	**86.1**	**74.2**	**85.9**	**121.0**	**54.4**	**125.0**	**147.3**	**236.5**	**77.9**	**53.1**	**146.7**	**95.6**	**178.9**	1,468		

Notes:
Assessed new Brookfield scheme would have same zonal trade draw patterns as existing retail facilities within Brookfield (see Table C)
Trade draw within each zone has been assessed having regard to the existing shopping patterns and location of existing retail facilities
Figures may not add due to rounding

2012 Prices

COMPARISON GOODS FLOORSPACE SCENARIO IMPACT TESTING
Scenario Impact Test 2: Previous Core Strategy Floorspace (Tested in July 2010 Core Strategy Bridging Report)

Table Fiii: Comparison Goods Expenditure, 2024 - With Brookfield Development (High Sales Density Scenario)

Destination	Zone													Total Study Area (£m)	Trade from Beyond Study Area (£m)	Total Turnover (£m)
	1 (£m)	2 (£m)	3 (£m)	4 (£m)	5 (£m)	6 (£m)	7 (£m)	8 (£m)	9 (£m)	10 (£m)	11 (£m)	12 (£m)	13 (£m)			
Brookfield	26.7	36.9	41.0	67.5	3.2	24.3	33.9	25.7	20.5	5.5	28.5	27.0	3.9	344.7	14.3	358.9
Waltham Cross Town Centre	0.8	5.7	6.6	22.2	1.6	14.9	8.9	12.8	7.1	1.3	1.1	2.5		85.5	4.3	89.8
Hoddesdon Town Centre	20.2	5.8	1.6	3.8	0.3		1.3		0.0	0.1	1.3	3.9		38.2	1.4	39.6
Cheshunt Old Pond District Centre	2.7	4.1	8.2	4.5	1.4	2.9			3.7	1.7	3.3	1.8	0.6	34.9	1.8	36.7
Other within Broxbourne	0.1	1.9	1.8	1.0	0.5		2.0	1.9	0.1	0.2		0.3		9.9		9.9
Sub Total Borough of Broxbourne	**50.5**	**54.3**	**59.2**	**99.1**	**6.9**	**42.0**	**46.2**	**40.4**	**31.5**	**8.8**	**34.2**	**35.5**	**4.5**	**513.2**	**15.7**	**528.9**
Harlow Town Centre	12.2	6.0	2.3	0.4	31.3	5.0	0.5		1.0	3.3	18.9	12.4	96.6	189.9	251.8	441.8
Harlow Retail Parks/Foodstores	8.7	2.6	2.5	0.3	11.1	2.6	0.5			2.4	8.7	7.5	43.4	90.4		
Enfield Town Centre	1.7	1.0	2.6	5.9	0.1	5.0	57.8	91.8	2.3	2.4	0.4	7.7	2.4	181.0	48.7	229.7
Enfield Retail Parks/Foodstores	0.9	4.2	3.5	3.0		5.6	27.9	43.3	0.6	0.2	0.6		0.2	89.9		
Welwyn Garden City Town Centre	4.0	1.3	3.1	1.5	1.3	2.0		7.7	24.5	16.5	13.8	5.8		81.6	207.6	289.2
Hertford Town Centre	1.6	0.2	1.0	0.6		0.5	0.3			6.3	19.7	5.7		35.9	11.8	47.8
Hertford Retail Parks/Foodstores	0.1									0.4	3.8	1.1		5.4		
Hatfield Town Centre	1.4	0.2	1.0	0.2				1.3	1.9	0.9	2.6	0.6	3.1	13.2	64.3	77.6
Hatfield Retail Parks/Foodstores		0.1	0.1						0.8	0.3	1.5			2.7		
Stevenage Town Centre	0.4	0.2	0.0	0.0				1.3	0.3	1.2	13.9	4.1		21.5	103.5	125.0
Stevenage Retail Parks/Foodstores	0.7	0.2	3.4	1.9		14.3			0.3	0.6	2.9	1.9		26.3		26.3
Ware Town Centre			0.1				0.1				12.8	1.2		15.2	10.0	25.2
Lakeside Shopping Centre	1.6	0.3	0.3	0.9	0.9	2.4	0.9			0.4		3.9	12.5	24.2		23.9
Bluewater Shopping Centre			0.1	0.2	0.2	1.9		4.6		0.2				7.2		6.9
Other (including Central London)	2.2	3.5	6.7	7.0	2.6	43.6	13.2	46.1	14.6	9.2	12.8	8.2	16.1	185.8		184.9
Total	**86.1**	**74.2**	**85.9**	**121.0**	**54.4**	**125.0**	**147.3**	**236.5**	**77.9**	**53.1**	**146.7**	**95.6**	**178.9**	**1,468**		

Notes:
Assessed new Brookfield scheme would have same zonal trade draw patterns as existing retail facilities within Brookfield (see Table C)
Trade draw within each zone has been assessed having regard to the existing shopping patterns and location of existing retail facilities
Figures may not add due to rounding

2012 Prices

COMPARISON GOODS FLOORSPACE SCENARIO IMPACT TESTING

Scenario Impact Test 2: Previous Core Strategy Floorspace (Tested in July 2010 Core Strategy Bridging Report)

Table Gi: Potential Trading Effects of Planned Brookfield, 2024 (Low Comparison Goods Sales Density Scenario)

Destination	Total Combined Retail Turnover		Residual Combined Total Turnover after Planned Brookfield, 2024 (£m)	Impact of New Floorspace		Residual Combined Total Turnover after Planned Brookfield & Retail Park Commitment, 2024 (£m)	Cumulative Impact	
	2016 (£m)	2024 (£m)		Change in Turnover 2016-2024 (%)	Impact on 2024 Turnover (%)		Change in Turnover 2016-2024 (%)	Impact on 2024 Turnover (%)
	[1]	[2]	[3]	[4]	[5]	[6]	[7]	[8]
Centres Inside Borough								
Waltham Cross Town Centre	107.5	130.6	124.2	15.5	-4.9	123.7	15.1	-5.3
Hoddesdon Town Centre	128.6	140.5	136.0	5.8	-3.2	135.9	5.7	-3.3
Cheshunt Old Pond District Centre	43.9	52.8	51.5	17.3	-2.4	51.5	17.1	-2.5
Centres Outside Borough								
Harlow Town Centre	358.6	533.4	504.8	40.8	-5.4	502.4	40.1	-5.8
Enfield Town Centre	211.1	293.4	276.7	31.1	-5.7	275.3	30.4	-6.2
Welwyn Garden City Town Centre	294.9	355.7	340.5	15.5	-4.3	339.2	15.0	-4.6
Hertford Town Centre	106.9	126.1	121.2	13.4	-3.9	120.8	13.0	-4.2
Hatfield Town Centre	106.9	136.7	134.4	25.7	-1.7	134.2	25.5	-1.8
Stevenage Town Centre	167.8	204.4	201.1	19.8	-1.6	200.8	19.7	-1.8
Ware Town Centre	66.8	77.8	76.0	13.8	-2.3	76.0	13.8	-2.3

Notes:
[1] & [2] Combined Retail Turnovers derived from Tables 3, 4, 5 & 6
[3] Derived from Tables Di and 12
[4] = ([3]-[1])/[1]%
[5] = ([3]-[2])/[2]%
[6] Comparison goods turnover of extension asssessed to be £8.4m (retail warehouse sales density of £4,300/sq m applied to 1,957sq m net floorspace (assuming 80/20 gross/net split)).
Assumed same trade diversion patterns as comparison goods floorspace of new Proposed Brookfield scheme
[7] = ([6]-[1])/[1]%
[8] = ([6]-[2])/[2]%
Figures may not add due to rounding

2012 Prices

COMPARISON GOODS FLOORSPACE SCENARIO IMPACT TESTING

Scenario Impact Test 2: Previous Core Strategy Floorspace (Tested in July 2010 Core Strategy Bridging Report)

Table Gii: Potential Trading Effects of Planned Brookfield, 2024 (Medium Comparison Goods Sales Density Scenario)

Destination	Total Combined Retail Turnover		Residual Combined Total Turnover after Planned Brookfield, 2024 (£m)	Impact of New Floorspace		Residual Combined Total Turnover after Planned Brookfield & Retail Park Commitment, 2024 (£m)	Cumulative Impact	
	2016 (£m)	2024 (£m)		Change in Turnover 2016-2024 (%)	Impact on 2024 Turnover (%)		Change in Turnover 2016-2024 (%)	Impact on 2024 Turnover (%)
	[1]	[2]	[3]	[4]	[5]	[6]	[7]	[8]
Centres Inside Borough								
Waltham Cross Town Centre	107.5	130.6	123.0	14.4	-5.8	122.7	14.1	-6.0
Hoddesdon Town Centre	128.6	140.5	135.7	5.6	-3.4	135.7	5.5	-3.5
Cheshunt Old Pond District Centre	43.9	52.8	51.4	16.9	-2.7	51.3	16.8	-2.8
Centres Outside Borough								
Harlow Town Centre	358.6	533.4	498.5	39.0	-6.5	497.0	38.6	-6.8
Enfield Town Centre	211.1	293.4	273.0	29.3	-7.0	272.1	28.9	-7.3
Welwyn Garden City Town Centre	294.9	355.7	337.1	14.3	-5.2	336.3	14.0	-5.4
Hertford Town Centre	106.9	126.1	120.2	12.4	-4.7	120.0	12.2	-4.9
Hatfield Town Centre	106.9	136.7	134.0	25.3	-2.0	133.8	25.2	-2.1
Stevenage Town Centre	167.8	204.4	200.4	19.4	-2.0	200.2	19.3	-2.1
Ware Town Centre	66.8	77.8	75.7	13.4	-2.6	75.7	13.4	-2.6

Notes:
[1] & [2] Combined Retail Turnovers derived from Tables 3, 4, 5 & 6
[3] Derived from Tables Di and 12
[4] = ([3]-[1])/[1]%
[5] = ([3]-[2])/[2]%
[6] Comparison goods turnover of extension asssessed to be £8.4m (retail warehouse sales density of £4,300/sq m applied to 1,957sq m net floorspace (assuming 80/20 gross/net split)).
Assumed same trade diversion patterns as comparison goods floorspace of new Proposed Brookfield scheme
[7] = ([6]-[1])/[1]%
[8] = ([6]-[2])/[2]%
Figures may not add due to rounding

2012 Prices

COMPARISON GOODS FLOORSPACE SCENARIO IMPACT TESTING
Scenario Impact Test 2: Previous Core Strategy Floorspace (Tested in July 2010 Core Strategy Bridging Report)

Table Giii: Potential Trading Effects of Planned Brookfield, 2024 (High Comparison Goods Sales Density Scenario)

Destination	Total Combined Retail Turnover		Residual Combined Total Turnover after Planned Brookfield, 2024 (£m)	Impact of New Floorspace		Residual Combined Total Turnover after Planned Brookfield & Retail Park Commitment, 2024 (£m)	Cumulative Impact	
	2016 (£m)	2024 (£m)		Change in Turnover 2016-2024 (%)	Impact on 2024 Turnover (%)		Change in Turnover 2016-2024 (%)	Impact on 2024 Turnover (%)
	[1]	[2]	[3]	[4]	[5]	[6]	[7]	[8]
Centres Inside Borough								
Waltham Cross Town Centre	107.5	130.6	122.4	13.8	-6.3	122.1	13.6	-6.5
Hoddesdon Town Centre	128.6	140.5	135.6	5.5	-3.5	135.5	5.4	-3.6
Cheshunt Old Pond District Centre	43.9	52.8	51.3	16.6	-2.9	51.2	16.5	-3.0
Centres Outside Borough								
Harlow Town Centre	358.6	533.4	495.4	38.2	-7.1	493.9	37.7	-7.4
Enfield Town Centre	211.1	293.4	271.2	28.5	-7.6	270.3	28.0	-7.9
Welwyn Garden City Town Centre	294.9	355.7	335.4	13.7	-5.7	334.6	13.5	-5.9
Hertford Town Centre	106.9	126.1	119.7	11.9	-5.1	119.5	11.7	-5.3
Hatfield Town Centre	106.9	136.7	133.7	25.0	-2.2	133.6	24.9	-2.2
Stevenage Town Centre	167.8	204.4	200.0	19.2	-2.1	199.8	19.1	-2.2
Ware Town Centre	66.8	77.8	75.6	13.2	-2.8	75.6	13.2	-2.8

Notes:
[1] & [2] Combined Retail Turnovers derived from Tables 3, 4, 5 & 6
[3] Derived from Tables Di and 12
[4] = ([3]-[1])/[1]%
[5] = ([3]-[2])/[2]%
[6] Comparison goods turnover of extension asssessed to be £8.4m (retail warehouse sales density of £4,300/sq m applied to 1,957sq m net floorspace (assuming 80/20 gross/net split)).
Assumed same trade diversion patterns as comparison goods floorspace of new Proposed Brookfield scheme
[7] = ([6]-[1])/[1]%
[8] = ([6]-[2])/[2]%
Figures may not add due to rounding

2012 Prices

Appendix E
Existing/Planned/Committed In-Centre Investment Schedules

BOROUGH OF BROXBOURNE COUNCIL

LOCAL PLAN RETAIL EVIDENCE BASE DOCUMENT

BROOKFIELD RETAIL/ LEISURE IMPACT STUDY

EXISTING, PLANNED AND COMMITED IN-CENTRE INVESTMENT

HARLOW TOWN CENTRE

Site Name/ Description	Site Area (ha)	Location	Current Use	Potential Use	Assessment	
					Policy Status of Investment	Progress on Investment
Harvey Centre, Harvey Centre Approach	0.56	Site is located within PSA and Town Centre Boundary.	Mix of retail and service units	Planning permission (re. HW/PL12/00143) granted on 21 June 2012 for re-development of first floor Harvey Centre to include: • a new 6 screen cinema and • 5 restaurant units; and • 2 cafe units It involves conversion of 15 retail units with a net retail floorspace of 5,096sq m.	Not allocated or identified for any specific use/development in adopted or emerging local plans.	Planning permission (ref. HW/PL12/00143) currently being implemented. Work due to be completed and development open by end of 2016. Cinema and a number of restaurant/café units now open.
Former M&S Unit , 36 Broad Walk, Broad Walk Mall	0.25	Site is located within PSA and Town Centre Boundary.	A1 shop	Planning permission (ref. HW/PL/16/00004) granted on 29 March 2016 for change of use of premises from retail shops to mixed use development comprising: • 4 shop units (A1) total 1,575sq m net floorspace; • 1 financial and professional services unit (A2) 439sq m net floorspace; • 2 Restaurant and Cafe units (A3) total 434sq m net floorspace; and • 1 gym (D2) 2,727sq m net floorspace.	Not allocated or identified for any specific use/development in adopted or emerging local plans.	Planning permission (ref. HW/PL/16/00004) currently being implemented. Work due to be completed and development open by end of 2016. Pre-lets secured for Nationwide, F Hinds and Xercise4Less.

Notes:
PSF = Primary Shopping Frontage
(as defined in the Adopted Local Plan)

BOROUGH OF BROXBOURNE COUNCIL

LOCAL PLAN RETAIL EVIDENCE BASE DOCUMENT

BROOKFIELD RETAIL/ LEISURE IMPACT STUDY

EXISTING, PLANNED AND COMMITED IN-CENTRE INVESTMENT

ENFIELD TOWN CENTRE

Site Name/ Description	Site Area (ha)	Location	Current Use	Potential Use	Assessment	
					Policy Status of Investment	Progress on Investment
Enfield Town Centre Station Area, Southbury Road, Enfield	2.5 (approx)	Site is located within PSF and within the Major Centre area.	Station and car parking.	Adopted Core Strategy Policy CP42 identifies potential for a retail-led mixed use development, accommodating approximately: • 10,000sq m of retail floorspace, • up to 500 new homes, • community uses and health care, • a new primary school and • an improved public transport interchange, potentially incorporating a relocated bus station from Little Park Gardens.	Identified as a priority for redevelopment with the town centre in the 2010 Adopted Core Strategy	We understand that preliminary talks were held on the 18 May 2016 between the Council and landowners regarding the potential redevelopment of the site. The Council has suggested that they intend to consult local businesses shortly to inform preparation of a masterplan. There are currently no timescales for delivery or any scheme drawings as yet. It is therefore clear that the potential redevelopment of this site is at a very early stage.

Notes:
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SSF = Secondary Shopping Frontage
(as defined in the Adopted Core Strategy (no Primary Shopping Area defined))

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EXISTING, PLANNED AND COMMITED IN-CENTRE INVESTMENT

WELWYN GARDEN CITY TOWN CENTRE

Site Name/ Description	Site Area (ha)	Location	Current Use	Potential Use	Assessment	
					Policy Status of Investment	Progress on Investment
Welwyn Garden City Town Centre North development site, South of Bridge Road	1.2	Site is located within the Primary Retail Core and Town Centre Boundary	Range of uses including roundabout, gardens, car park and retail units.	Adopted District Plan Saved Policy TCR4 identifies site for major retail development [with particular emphasis on retailing for comparison goods (5,800sq m gross)]. The following key opportunities for development of the site and wider area are suggested: • new retail development at ground and lower ground with potential for residential uses above; • Creation of focal Pavilion type building; • Potential future redevelopment of existing retail units • Scope to expand Debenhams into larger format store • Long term vision – redevelopment of existing multi-storey car park to integrate plot as mixed-use scheme with active frontage (note this falls outside of the site boundary).	Identified in Adopted District Plan 2005 Policy TCR4 and in Welwyn Garden City Town Centre North SPD (April 2015) for retail development. Emerging Local Plan (consultation document January 2015) identifies that it is the Council's intention to roll forward policy TCR4 taking account of the Adopted SPD.	Planning Officers at Welwyn Hatfield Borough Council confirmed that there has not been any progress in delivering any development at this site. Officers also identified that there are no indicative timescales for delivery of the development.
Former Shredded Wheat Factory site, Bridge Road and Broadwater Road.	12.6	Site is located outside of Primary Retail Core and Town Centre Boundary, but adjacent to both.	Former cereal production factory and (largely cleared) industrial and factory uses. Site redundant and vacant since 2008.	Current 'live' outline planning application (ref. N6/2015/0294/PP) and Listed Building Consent application (ref. N6/2015/0293/LB) for part demolition, repair and refurbishment of listed buildings to provide: • 2 Class C3 residential units (up to 850 units), • Class A1 units (up to 571 sq m gross incl. Small convenience store and bike shop); • a Class C1 boutique/ budget hotel (2,554sq m gross), • Class B1(a) offices (6,370sq m), • a Class A3/A4 restaurants/cafe and pub/bar (1,928sq m gross), • Class D1 crèche (650sq m gross), community buildings (757sq m gross) and health care unit (834sq m gross) and • a Class D2 gym/ dance/ exercise studio (703sq m gross)	Identified in the Adopted District Plan (Policy EMP3) for employment led mixed-use development. Reference is made to compliance with Policy EMP2, which states the Use Classes considered appropriate are predominantly B1, B2 and B8 with ancillary retail development. Emerging Local Plan (consultation document January 2015) and Adopted Broadwater Road West SPD identifies site for large-scale mixed-use development and is considered suitable for 857 residential dwellings and other uses.	At planning application/listed building consent stage (see potential use column). We understand additional information has recently been submitted for the application (March 2016) and the statutory time period has been extended to September 2016. Highways and Environment Agency have responded with no objections to the proposed development. We are not aware of any timescales in terms of the potential implementation of this scheme.

Notes:
PSF = Primary Retail Core
(as defined in Adopted Local Plan (no Primary Shopping Area defined))

EXISTING, PLANNED AND COMMITED IN-CENTRE INVESTMENT

HERTFORD TOWN CENTRE

Site Name/ Description	Site Area (ha)	Location	Current Use	Potential Use	Assessment	
					Policy Status of Investment	Progress on Investment
Riverside Yards incorporating Nicholas Lane, Maidenhead Yard, Adam's Yard and Dolphin Yard	1.0	Situated within PSF (2007 Adopted Local Plan)	Mix of uses	Adopted Policy HE7 states Riverside Yard should be redeveloped for mixed use development involving retail, residential and community uses. Planning permission (ref: 3/15/0928/FUL) approved at Committee in November 2015 subject to S106 for: • 6 flats, • 2 houses, and • 2 commercial units (B1a Use) total 130sq m gross.	Site identified for mixed use development within Adopted Local Plan Second Review 2007 (Policy HE7). Not allocated or identified for any specific use/development in emerging local plan	We understand that the development has commenced at Adams Yard despite planning permission not formally being issued due to the S106 not signed as yet. The S106 is due to be completed shortly.
Bircherley Green Shopping Centre	0.8	Situated within PSF (2007 Adopted Local Plan)	Existing foodstore and other retail uses.	Bircherley Green Regeneration consulted on a proposed mixed-use development scheme in 2014 consisting of the following: • Waitrose foodstore (sales area of around 2,040sq m) and residential above (approx 76 homes); • Revitalised retail units on Railway Street (approx 515sq m gross)and residential above (approx 16 homes); • Larger retail and restaurant units off Bircherley Square (approx 850sq m gross) with residential above (approx 12 homes); • Riverside cafe/ restaurant (350sq m gross) with residential above (approx 20 homes); and • 150 space car park. A planning application for the scheme was not submitted and the proposal appears to have been abandoned with the owners currently considering a different scheme.	Not allocated or identified for any specific use/development in adopted or emerging local plans.	We understand that East Hertfordshire Council are currently in ongoing negotiations regarding a mixed retail (including small element of convenience), residential, and hotel scheme including possible health, cinema and car parking. The Council indicate that a separate hotel application may come forward early. There are no timescales for the sites redevelopment or any scheme drawings available at the time of writing.
The Marquee, Railway Street	0.1	Situated within SSF (2007 Adopted Local Plan)	Vacant arcade building.	Planning permission (ref. 3/15/1866/FUL) granted in November 2015 for: • ground floor to be used for 457sq m gross A1 (retail) and entrance to D2 (gymnasium) (Anytime Fitness); and • 547sq m at the first floor to D2 use (gymnasium). More recently in April 2016 permission was granted (ref. 3/16/0147/FUL) for change of use of ground floor retail (A1) to restaurant (A3) use.	Not allocated or identified for any specific use/development in adopted or emerging local plans	We understand from East Hertfordshire Council that work to implement planning permissions 3/15/1866/FUL and 3/16/0147/FUL has commenced on site and end occupiers have already been secured.

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HERTFORD TOWN CENTRE

Site Name/ Description	Site Area (ha)	Location	Current Use	Potential Use	Assessment	
					Policy Status of Investment	Progress on Investment
Potential opportunity site to east of Fore Street	0.1	Situated within SSF (2007 Adopted Local Plan)	M&S Simply Food and adjacent garage.	Potential for a larger M&S unit	Not allocated or identified for any specific use/development in adopted or emerging local plans Site was reviewed as part of the Town Centre Urban Design Strategy (September 2015). The Council concluded that the site shall not be included as a potential development opportunity in the emerging District Plan.	No investment plans or timescales.
McMullen's Brewery site, Hartham Lane,	1.7	Outside of PSF and SSF (no town centre boundary defined in 2007 Adopted Local Plan)	Employment uses	Planning permission (ref. 3/08/1528/FP) and listed building consent (ref. 3/10/2048/LB) was granted in 2010 for the mixed-use redevelopment of part of the McMullen's Brewery site, comprising a foodstore, offices, commercial and community space. We understand that the above scheme has now been developed and the foodstore element is occupied by Sainsbury's. *The remainder of the site (0.6ha) is allocated for employment use in the emerging District Local Plan and is currently in active use.	Adopted Policy HE8 identifies area as existing employment land which should be retained for existing employment use. Emerging Plan Policy HERT6 also identifies the site as a designated employment area.	Planning permission for Sainsbury's foodstore and offices has been implemented. Planning officers at East Hertfordshire Council state that they are not aware of any investment plans for the remainder of the site.

Notes:
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HATFIELD TOWN CENTRE

Site Name/ Description	Site Area (ha)	Location	Current Use	Potential Use	Assessment	
					Policy Status of Investment	Progress on Investment
Land at eastern end of Hatfield Town Centre, site bounded by Robin Hood Lane, The Common, Wellfield Road, Queensway and The Arcade	3.3	Site is located within the Primary Retail Core and Town Centre Boundary.	Mix of buildings, primarily retail with residential above and car parks.	Identified for comprehensive redevelopment for mixed-use retail led scheme in Adopted District Plan (Saved Policy TCR14) and Revised Planning Brief (2002) to provide the following: • retail floorspace (11,000sq m); • cafes and restaurant uses; • offices; • Housing; • Community facilities • Markets; • New bus interchange and car parking.	Identified in Adopted District Plan (Saved Policy TCR14), Hatfield Town Centre East Redevelopment SPD and emerging Local Plan for retail led mixed-use development. Emerging Local Plan (consultation document January 2015) states the Council intends to roll forward policy TCR14 into the emerging plan.	Part of the site has been recently developed for 5 shop and cafe units (558sq m) and 15 residential units. We understand that shops are currently let to Savers Health and Beauty, Coral and Fone Smart with one outstanding unit vacant. Planning Officers at East Hertfordshire have confirmed that the Council has now parted company with its development partner (St. Modwen Developments Ltd) and no new developer is in place at present. Planning Officers have indicated that the Council is undertaking refurbishment works of residential and retail units at the eastern end of the existing town centre and examining opportunities to undertake its own more limited redevelopment for retail and residential.

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EXISTING, PLANNED AND COMMITED IN-CENTRE INVESTMENT

STEVENAGE TOWN CENTRE

Site Name/ Description	Site Area (ha)	Location	Current Use	Potential Use	Assessment	
					Policy Status of Investment	Progress on Investment
Northgate Major Opportunity Area, Lytton Way	4.1	Part of site situated in PSF.	Tesco Extra store and Saffron Ground office building.	Aspirations in emerging Local Plan (Policy TC6) for: • high density residential development; • new A1, A3 and A4 shop, bar, restaurant and cafe uses (up to 20,850sq m floorspace identified for area in Town Centre Framework); • replacement Tesco foodstore; • new office premises (5,626sq m); • new multi-storey or basement parking; • replacement cycle and pedestrian footbridge between Ditchmore Lane and Swingate; and • signature public spaces.	Identified as an 'Opportunity Area' in the Emerging Local Plan - Publication Draft Feb 2016 (see potential use column for details). Not allocated or identified for any specific use/development in the adopted local plan (saved policies).	We understand that initial 'in principle' discussions have taken place with Tesco and that the site is unlikely to come forward until the end of the plan period, transitioning into the post-2031 period. Accordingly, there are currently no plans or timescales for the redevelopment of the site.
Marshgate Major Opportunity Area, St George's Way	3.5	Part of site situated within PSF and part within SSF.	Area currently includes Town Centre Gardens, car park, shop units, youth centre and Swimming Centre.	Aspiration in emerging Local Plan (Policy TC7) for: • high density residential development (up to 150 units) • new Use Class D1 and D2 leisure, cultural and civic uses; (proposed uses include sport and leisure facilities, art centre and community facility, up to 5,000sq m floorspace); • new A1, A3 and A4 shop, bar, restaurant and cafe uses (up to 3,800sq m floorspace); • new multi-storey or basement parking.	Identified as an 'Opportunity Area' in the Emerging Local Plan (see potential use column for details). Not allocated or identified for any specific use/development in the adopted local plan (saved policies).	Planning Officers at Stevenage Borough Council have indicated consultants have been appointed to undertake viability and master-planning work for the leisure uses. There are developer interests in a part of the area but it is still early stage discussions. The redevelopment of the site is considered to be linked to and partially rely on elements of the Station Gateway Major Opportunity Area.
Former Matalan site, Matalan Retail Park, Danestrete	1.3	Site is located outside of PSF and SSF but within Town Centre Boundary.	Former Matalan unit and car parks.	Resolution to approve outline planning permission on the site (ref. 14/00559/OPM) for: • 526 residential apartments; and • 1,670sq m retail floorspace (uses A1, A2 & A3) – unit sizes to be determined within Reserved Matters application.	Site is included within Southgate Park Major 'Opportunity Area' (Policy TC2) and identified as being suitable for mixed-use residential and civic hub development. Not allocated or identified for any specific use/development in the adopted local plan (saved policies).	Emerging Local Plan (Publication Draft Feb 2016) identifies there is a resolution to grant planning permission. We understand that negotiations are on-going with the land-owners and the Borough Council to bring forward the scheme jointly.
Station Gateway Major Opportunity Area, Lytton Way	6.6	Site is located outside of PSF and SSF but within Town Centre Boundary.	Mixed uses; 1970s train station, the Arts and Leisure Centre (including the Gordon Craig Theatre) and car parks.	Aspirations in emerging Local Plan (Policy TC4) for: • regenerated train station; • new bus station; • high density residential development; • new multi-storey or basement parking; • new office premises; • new hotel; and • new Use Class A1 retail and Use Class A3 restaurant and cafe uses (up to 2,800sq m)	Identified as an 'Opportunity Area' in the Emerging Local Plan (see potential use column for details). Not allocated or identified for any specific use/development in the adopted local plan (saved policies).	A masterplan for a new train station building has been agreed with Network Rail and a funding package is being negotiated. Replacement bus station has reached options stage.

EXISTING, PLANNED AND COMMITED IN-CENTRE INVESTMENT

STEVENAGE TOWN CENTRE

Site Name/ Description	Site Area (ha)	Location	Current Use	Potential Use	Assessment	
					Policy Status of Investment	**Progress on Investment**
Central Core Major Opportunity Area, area around Danestrete	3.4	Site is located outside of PSF and SSF but within Town Centre Boundary.	Mixed uses; Town Square, the Borough Council offices, Mecca bingo, bus station, the magistrates courts, car park and existing shops.	Aspirations in emerging Local Plan (Policy TC5) for: • high density residential development; • new A1, A3 and A4 shop, bar, restaurant and cafe uses, including an extension to Westgate Centre of around 4,700sq m comparison floorspace; • new multi-storey or basement parking; • new office premises; • new Use Class D1 and D2 leisure, cultural and civic uses, including a replacement theatre and museum; and • Signature public spaces	Identified as an 'Opportunity Area' in the Emerging Local Plan (see potential use column for details). Relevant Adopted Local Plan Policy not saved.	We understand that negotiations on land assembly and marketing are on-going between Stevenage Borough Council and various different private-sector ownerships regarding land assembly for new theatre. The delivery of redevelopment will rely on relocation of the bus station.
Centre West Major Opportunity Area, Stevenage Leisure Park, Fulton Close	8.1	Site is located outside of the PSF and SSF.	Existing Stevenage Leisure Park including gym, restaurant units, cinema, 10 pin bowling and car parking.	Aspirations in emerging Local Plan (Policy TC3) for: • high density residential development; • replacement Use Class D1, D2 leisure and Use Class A3 and A4 bar, restaurant and cafe uses; • new multi-storey or basement parking, • new office premises (9,900sq m floorspace); • new A1 convenience retail to serve day to day needs of new residents; and • a hotel.	Adopted Local Plan (Saved Policy L3) identifies site for leisure proposals, D2 and A3 uses. Identified as an 'Opportunity Area' in the Emerging Local Plan (see potential use column for details).	Emerging Local Plan (Publication Draft Feb 2016) states initial discussions with regard to the redevelopment of the site have taken place with the current owners of the Leisure Park, Legal and General Property. The active use of the leisure park is likely to make the redevelopment of the site difficult to achieve in the short/medium term. It is not clear whether Legal and General are interested in redeveloping the site. There are currently no plans or timescales for the potential redevelopment of the site.

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WARE TOWN CENTRE

Site Name/ Description	Site Area (ha)	Location	Current Use	Potential Use	Assessment	
					Policy Status of Investment	Progress on Investment
20 Amwell End, Ware	0.049	Situated within PSF (2007 Adopted Local Plan) and SSF in emerging Pre-Submission District Local Plan (Dec 2016)	Disused former nightclub.	Current live planning application (ref. 3/15/0561/FUL) on site for 'Part demolition of existing night club building and redevelopment with commercial/retail use (394sq m) and parking on the ground floor and 10 residential units on floors 1, 2 and 3.'	Not allocated or identified for any specific use/development in adopted or emerging local plans.	Planning application target determination date September 2016, application deferred at committee on parking grounds.

Notes:
PSF – Primary Shopping Frontage
SSF – Secondary Shopping Frontage

Appendix F
Waltham Cross Town Centre Northern High Street Opportunity Zone

Source: Waltham Cross Town Centre Strategy (2015)