

Broxbourne Borough Council

**Retail and Town Centres:
Evidence Base Bridging Report**

Executive Summary

July 2010

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1. EXECUTIVE SUMMARY

Introduction

- 1.1 Broxbourne Borough Council have, in recent years, commissioned a number of robust evidence base documents to ensure a proactive planning approach to their network of town centres consistent with guidance set out in PPS6 (2005) and more recently PPS4 (2009). As part of this process, the Council are also producing comprehensive 'Town Centre Strategies' which form a crucial part of the evidence base framework. The Main Report draws on each of the previous work stages and provides one 'bridging document' to set out the recommended strategy and implications in respect of the Borough's retail and town centre policy framework in order to inform the LDF and continued preparation of the Core Strategy.

Policy Framework

- 1.2 PPS4 (2009) sets out the Government's clear policy to promote sustainable economic growth, including development within the B Use Classes, public and community uses and main town centre uses. The overarching policy thrust is to sustain and enhance the vitality and viability of existing centres, wherever possible, and to plan positively for new development within them having regard to the role and needs of their catchments. LPAs are urged to set out a strategy for the management and growth of centres over the plan period, identifying means to accommodate identified need for growth and any deficiencies in the network of centres, with consideration given to the appropriateness of new centres or planning for extensions.
- 1.3 The RSS was adopted in May 2008, but is soon to be abolished under the new coalition government who have written to confirm this long-standing commitment. Until such time of clarification (apparently in the near future), LPA's and the Planning Inspectorate are directed to have regard to the subject letter as a material planning consideration. In any event, the 2008 RSS directs the local authority to define the future role of the Brookfield Centre.
- 1.4 The Draft Core Strategy (2008) recognises that the Borough is highly dependent on major shopping centres outside its boundaries, and that the Brookfield Centre is the highest level shopping location in the Borough. The main centres of Hoddesdon and Waltham Cross are identified as having local markets, and are unable to compete at that level. The document encourages the sustainable growth of Greater Brookfield, providing a mix of uses and reducing the need to travel outside the Borough; and permits development at Waltham Cross and Hoddesdon providing it improves their vitality and viability. Cheshunt is directed to maintain its role as a District Centre.

- 1.5 The Core Strategy sets out proposals for growth at Greater Brookfield, which include a mix of uses and promotes sustainable economic growth, objectives which accord with PPS4. The document emphasises that applications for development should be supported by a Retail Impact Assessment to demonstrate that the proposed development will not have an adverse impact on the vitality and viability of other centres in the borough.

Sub-Regional Context

- 1.6 The Sub-Regional Assessment demonstrates the influence of the major comparison shopping destinations on those living in Broxbourne, particularly Enfield, Harlow and to a lesser extent Welwyn Garden City. Within Core Zones 1-4 (those zones broadly reflecting the Borough boundary), the Borough centres including Waltham Cross, Hoddesdon, Cheshunt and Brookfield retain only 36% of comparison goods expenditure, reflecting the significant leakage of trade from the Borough.
- 1.7 It is evident that the major competing centres are also embarking on proactive strategies and major strategic town centre development options which will further enhance their offer and overall vitality and viability. Enfield are preparing the Town Centre Area Action Plan; Harlow continue to facilitate proposals for the Town Centre North site; Welwyn continue to plan for the town centre Area Action Plan; Hertford has granted consent for a major mixed use Sainsbury's led scheme; Stevenage have published their Area Action Plan and identified significant capacity; Hatfield have granted consent for the Town Centre East redevelopment, and Watford are preparing an Area Action Plan and publishing updated retail capacity work.
- 1.8 In summary, the major competing centres to Broxbourne capture a significant amount of trade from the Borough and are all implementing, or have recently implemented, major town centre enhancements which will ensure a stronger positioning in the Sub-Region moving forwards. Those retail capacity studies underpinning the respective evidence base documents have also identified significant growth in expenditure, with identified site opportunities not sufficient to meet the full extent of capacity projected in the Sub-Regional 'system'.

The Broxbourne Centres

Hoddesdon

- 1.9 Overall, the importance of food retailing, the market and service operators are crucial to the vitality and viability of Hoddesdon town centre. Consistent with the GVA 2005 study, we conclude that Hoddesdon is not performing as a comparison shopping destination. Based on retail trends, and limited development opportunities in the centre, this is unlikely to change significantly in the future, although the Tower Centre may go some way to consolidating market share, although is not of a scale to create a step change in retail offer. We consider that the retail function of Hoddesdon is likely to consolidate, and

looking ahead the main focus of the centre will be for convenience shopping, local services and eating/drinking - continued investment in the quality of the environment will be crucial.

Waltham Cross

- 1.10 In Waltham Cross, the clothing and footwear comparison category is important to the centres performance at the current time, although it is evident that current composition is focused on the value and discount end of the market, with an absence of higher end operators. A relatively strong proportion (27.8%) of visitors state main food shopping as the main reason for visiting Waltham Cross; and whilst the foodstore offer is poor in qualitative terms, the shopper usage and demand is evident. The evening economy is particularly weak, and the centre is used rarely as a destination for pubs and restaurants. The Sturlas Way development site is a good strategic location to enhance the town centre offer. Given the intended role of Greater Brookfield, offering a range of higher end, key attractors, and its future role alongside Waltham Cross would likely be complementary but must be managed by the LPA.

Cheshunt

- 1.11 Overall, Cheshunt is performing the role of a smaller scale local shopping centre, providing for foodstore and service requirements. The centre does not perform the role of a comparison goods shopping destination, aside from small scale everyday essentials, and does not compete with Waltham Cross, Hoddesdon or Brookfield. The Council are encouraged to use the Use Classes Order to control the spread of undesirable uses such as A5 fast food take-aways; without policy control, it was concluded that Cheshunt is vulnerable to change and the loss of essential requirements which underpin the health of the centre and meet the needs of the local catchment.

Brookfield

- 1.12 Brookfield is recognised as the strongest comparison and convenience goods shopping destination in the Borough. The centre was originally developed in 1983 and currently comprises a 10,270 sq m gross Tesco foodstore and a 7,850 sq m gross Marks & Spencer linked by four smaller units including an estate agent, a healthfood store, and a Starbucks coffee shop outlet. There are few 'other' town centre uses such as local service facilities and eating/drinking destinations and the destination is focused on retail uses at the current time.
- 1.13 The Brookfield Retail Park, located on the other side of Halfhide Lane, is situated to the north-west of the Tesco/M&S complex comprising a total retail floorspace of 7,280 sq m net. The scheme comprises nine units let to high street fashion retailers Next, Clarks, JD Sports, Outfit, New Look, River Island, Clinton Cards and Thorntons. Halfhide Lane separates the retail park from the Brookfield Centre, and inadequate pedestrian linkages and physical barriers results in poor integration between the two retail components.

Leisure

- 1.14 In respect of leisure, we have identified gaps and potential need for cinema, bingo, tenpin bowling and private gyms within the Borough which would meet identified qualitative gaps in provision. Leisure representation is driven by commercial demand, but it is clear from our analysis that there is scope to enhance such facilities in the Borough to meet the needs of the local catchment.

Development Opportunities

- 1.15 The assessment of physical site opportunities has identified no major redevelopment sites in or on the edge of Hoddesdon or Waltham Cross; Hoddesdon has recently benefited from the redevelopment of the Tower Centre and is constrained by Conservation Area status and both centres are physically limited by surrounding land uses and roads.

Economic Capacity Projections

- 1.16 In light of the economic downturn, we have updated our original 2008 Retail Study outputs and tested both optimistic and conservative capacity forecasts. The identified levels of supportable capacity range from 8,404 sq m net by 2018 (growing to 18,399 sq m net by 2023) in the most conservative scenario, to 15,763 sq m net (growing to 27,440 sq m net) in the most optimistic.
- 1.17 These figures assume no change in shopping patterns and a continued significant leakage of trade (c.64%) to alternative and competing shopping destinations, resulting in unsustainable travel patterns and carbon emissions, as well as an outflow of investment, jobs and general prosperity not being captured in the Borough. Capacity forecasts set out above are highly conservative and demonstrate the significant leakage of trade from the Borough. In reality, there is a clear opportunity to enhance market share, and to claw back trade to support a greater level of retail floorspace than that identified in the 'current market share' capacity forecasts.
- 1.18 Our assessment of Global Capacity in the Sub-Region (i.e. the growth in expenditure above that required to support the improved business efficiency of existing floorspace), has identified surplus expenditure of £2.5 billion by 2018. The Greater Brookfield proposals (50,000 sq m gross) will absorb only c.£175m (7%) of this identified surplus, ensuring more than sufficient residual expenditure (c.£2.3b) to support all pipeline schemes throughout the Sub-Region. We conclude that there is more than sufficient capacity in the Sub-Region to support the improved business efficiency of existing retail floorspace, the Greater Brookfield proposals, and all pipeline schemes in competing town centres.

Town Centre Conclusions

- 1.19 PPS4 is driven by the objective to encourage sustainable economic growth, with the overall thrust to sustain and enhance the vitality and viability of town centres. Local authorities are urged to set out a strategy for the management and growth of centres; identifying means to accommodate identified need for growth and deficiencies in the network of centres, and reducing the need to travel. The RSS firmly puts the onus on the local authority to plan for the network of centres in Broxbourne given their small scale, and also refers them to determine the future role of Greater Brookfield in the Borough hierarchy. The RSS is soon to be abolished, as confirmed by the new coalition government, and this planning/policy position for Broxbourne Borough Council will remain unchanged; i.e. decision making powers resting with Local Planning Authorities.
- 1.20 Focusing on the wider Sub-Region, the influence of the major comparison shopping destinations is evident, with the Borough centres of Waltham Cross, Hoddesdon, Cheshunt and Brookfield only able to capture 36% of comparison goods trade generated within the Borough. The major competing centres to Broxbourne capture a significant amount of trade from the Borough and are all implementing, or have recently implemented, major town centre enhancements which will ensure a stronger positioning in the Sub-Region moving forwards. The level of competition and threat of continued polarisation of retail activity to Broxbourne's larger competitors will result in significant challenges for the Borough without corresponding improvements to its own facilities.
- 1.21 The retail capacity studies underpinning each authorities respective evidence base documents have also identified significant growth in expenditure, with identified site opportunities not sufficient to meet the full extent of capacity projected in the Sub-Regional system. The assessment indicates that first, competing centres are all enhancing and diversifying their town centre offers which will lead to an increased leakage of trade from Broxbourne; and second, there is a substantial amount of forecast expenditure growth in the catchment area that cannot be entirely accommodated within these competing centres. Site identification does not equate to the full physical capacity required to meet the forecast growth in expenditure. Securing retail development in Broxbourne is critical to safeguarding its future and to help ensure more sustainable shopping patterns.
- 1.22 Our quantitative capacity projections for additional comparison goods floorspace are based on constant market share, i.e. assuming shopping patterns do not change. The projections identified are constrained by the currently low market share and a continued significant leakage of trade (64%) to alternative and competing shopping destinations, resulting in unsustainable travel patterns and carbon emissions, as well as an outflow of investment, jobs and general prosperity not being captured in the Borough. Provided a scheme of sufficient critical mass came forwards in the Borough, there will be sufficient claw-back of spend to support more than the baseline forecast of 15,763 sq m net by 2018.

- 1.23 Indeed, our quantitative global Sub-Regional forecasts identify that even allowing for existing floorspace to improve their sales efficiency, there will be 'surplus expenditure' to support a significant additional amount of comparison goods floorspace throughout the wider Sub-Region. Nearby higher order centres, such as Enfield, Harlow and Welwyn Garden City, will have more than sufficient potential within their own catchment to secure their current aspirations – as identified in Section 3 – in parallel with retail growth in Broxbourne.
- 1.24 The detailed health check analysis of the centres of Hoddesdon, Waltham Cross and Cheshunt conclude them to all be performing well in line with their intended roles. Looking ahead, and given the physical constraints and built environment, the main focus of Hoddesdon will be for convenience shopping, local services and eating/drinking. Waltham Cross has a stronger comparison – albeit it more value/lower market – offer, which it should aim to retain, but it will be crucial to focus on strengthening the convenience goods, service and eating/drinking offer to ensure the diversity and therefore attraction required in a town centre. The Sturlas Way site is identified as an appropriate development opportunity to help achieve these goals.
- 1.25 Cheshunt is a small local shopping centre and does not compete with Hoddesdon, Waltham Cross or Brookfield. The Council should aim to retain the mix of useful 'everyday' facilities, and protect against a concentration of undesirable A5 fast food take-aways, for example. Cheshunt is vulnerable to a weak policy framework, rather than competing schemes elsewhere in the Borough. Greater Brookfield is the strongest convenience and comparison goods shopping destination in the Borough, and is an established part of the retail network in the Borough having been originally developed in 1983. In respect of leisure, we have identified gaps and potential need for cinema, bingo, tenpin bowling and private gyms within the Borough which would meet identified qualitative gaps in provision.
- 1.26 The assessment of physical site opportunities has identified no major redevelopment sites in or on the edge of Hoddesdon or Waltham Cross. Hoddesdon has recently benefited from the redevelopment of the Tower Centre and is constrained by Conservation Area status, and both centres are physically limited by surrounding land uses and roads. The constrained Sturlas Way development opportunity represents the most strategic development site, and whilst it could contribute significantly to enhancing the vitality and viability of Waltham Cross it is not able to provide the critical mass necessary to compete effectively with the higher order centres and claw-back lost trade. A number of smaller infill developments in each centre are likely to become apparent over time but would, on their own, have limited impact on trade claw back and increasing the Borough's overall market share.
- 1.27 The Government clearly aims to focus new economic growth and development of main town centre uses in existing centres and to remedy deficiencies in provision in areas with poor access to facilities. Competition between retailers and enhanced consumer choice is key to achieving the Government's overarching objectives of sustainable economic growth. Both PPS6 and PPS4 state that deficiencies should be addressed and consideration given to the scope for expansion, consolidation or the

- designation of new centres. In accordance with these policy objectives, it has consistently been concluded that any new retail development in the Borough needs to be of a sufficient scale and critical mass to reduce the loss of trade to other centres in the Sub-Region, and consequently meet the need of the local catchment and increase the currently low market share.
- 1.28 It is entirely appropriate to consider the potential of Greater Brookfield – a long established retail destination – to contribute to meeting the clearly defined need given the inability of the other town centres to physically accommodate the required critical mass. As we have already stated, Brookfield is by far the most significant convenience and comparison shopping destination within Broxbourne; the Tesco/M&S Retail Park collectively provides a comparable offer to a major town centre serving the Broxbourne area, and has a well established role within the wider retail hierarchy. It is apparent that the Brookfield Centre will continue to be the Borough’s dominant, higher order comparison retail destination.
- 1.29 It would not be appropriate to consider the provision of an entirely new centre, in addition to existing facilities at Greater Brookfield given policy objectives to consolidate and reduce the need to travel. Such an option would unlikely be attractive to retailers/operators on the basis that it fails to build on the established attraction of Greater Brookfield with its key anchor stores. The existing composition provides a strong commercial platform and catalyst for change. A minimum scale of 50,000 sq m gross (35,000 sq m net) has been historically identified, and tested, to ensure a commercially viable scheme, which might include the redevelopment of Tesco/Marks & Spencer and a range of new high street names such as Next, H&M, Gap, Zara, Mango etc., together with a choice of commercial leisure and eating/drinking facilities.
- 1.30 We have concluded that the most effective way to ensure that the proposals for Greater Brookfield are complementary to the future role of the existing Broxbourne Centres, besides restricting the scale of additional convenience floorspace permitted, is by supporting a development of sufficient critical mass to attract the necessary anchor stores and the type of quality High Street operators not currently represented in the area. In addition to minimising the impact on the existing Broxbourne centres, the provision of a new level of quality comparison retail and leisure operators at Greater Brookfield also maximises the prospects of retaining a higher level of expenditure within the Broxbourne Borough and catchment area.
- 1.31 The following sections of the Main Report focus on the ‘impact’ of such a strategic allocation in the Core Strategy, both on the Borough and the wider Sub-Region.

Impact

- 1.32 We have adopted a 2018 design year in respect of the Greater Brookfield proposals, and identified a total turnover of approximately £175 million based on a scheme comprising 35,000 sq m net comparison. We have tested the impact of this level of turnover on the network of centres in the wider

Sub Region within a 'Base', 'Low Growth' and alternative 'Sales Density' scenario, and in each case the scheme will not have a significant detrimental impact.

- 1.33 This is consistent with our conclusions in respect of the significant global capacity arising in the Sub Region over the LDF period. It should also be noted that the methodology did not take into account the potential for other new planned developments to come forward in other centres, such as the aspirations for Enfield, Welwyn or Harlow, which will inevitably reinforce the market share of these centres and offset the impact of new development at Greater Brookfield. In this context, our assessment is representative of worst case impact levels, which in themselves are not significant. It is evident, as outlined further below, that the future of the Borough's town centres alongside Brookfield is strong provided the right strategy and future directions are clearly set out.

Retail Growth

- 1.34 Waltham Cross has been identified as the centre most vulnerable to change at Greater Brookfield, but our assessment concludes that whilst there will be some small diversion of trade there will be no significant impact given the complementary nature of the already established trading destinations. Waltham Cross will continue to capture growth in retail expenditure and should focus on the drive for a strong mix of low/mid market and value comparison retailers, an enhanced convenience goods offer, and an improved A3/A4 eating/drinking offer. The future of Waltham Cross is viable alongside Greater Brookfield, and the ability to enhance the existing town centre offer is evident and should be facilitated through a strong town centre strategy moving forwards.
- 1.35 The impact of Greater Brookfield on Hoddesdon will be more limited given proximity and the very different retail offer which focuses on localised services and shopping facilities, eating and drinking, and food shopping. We have calculated a minimal quantitative impact on Hoddesdon as a consequence of Greater Brookfield which will enable the town centre to continue to capture growth in spend to ensure sustained real growth in turnover. The Town Centre Strategy for Hoddesdon ensures a pro-active approach to the future enhancement of the centre, building on the centres strengths moving forwards and sets out achievable implementation measures in accordance with the requirements of PPS4.
- 1.36 Our baseline impact assessment indicates that the level of impact predicted is more than offset by the significant scale of growth in the turnover of neighbouring centres in the period up to 2018. We conclude that the scale of development would not have any significant adverse impact on the turnover or vitality and viability of neighbouring town centres, or on their potential to accommodate new development in line with their current aspirations.

Economic and Regeneration Impacts

- 1.37 Our analysis has demonstrated that the development of a mixed use, retail led scheme at Greater Brookfield is likely to be of considerable net benefit to the local economy over and above the maintenance of the 'status quo'. The completion of the scheme will deliver a significant number of new jobs to the area and generate additional income within the local economy which will sustain greater levels of economic growth in the future.
- 1.38 Development would also provide greater employment opportunities for residents with low or no formal skills or qualifications, and the chance for work based training to enhance their future employment choices. This will make a significant contribution to addressing the relative poverty, deprivation and skills issues in the local labour pool. Crucially, in the longer term, the potential broadening of services and facilities provided and any subsequent improved perception of the area will assist in attracting follow-on inward investment to other employment sites within the Borough.
- 1.39 Overall, development at Greater Brookfield can provide a key component of the wider improvements required to create an uplift of quality and perception in the area, providing a strong foundation from which to encourage higher value growth throughout the Borough in the future.

Atmospheric Considerations

- 1.40 The analysis has identified that if existing patterns of shopping and travel behaviour were to continue over the period from 2018 to 2038, then the total emissions of carbon attributable to such journeys would be 1.25 million tonnes.
- 1.41 For the Baseline (non-cautious) scenario, which assumes that shoppers in the area may change their habits in favour of new facilities at Greater Brookfield (for both local and journeys over slightly greater distances), the projected journeys would generate 1.12 million tonnes of carbon between 2018 and 2038. This equates to a reduction in emissions of carbon of 9.9%, relative to the Do-Minimum scenario (which excludes the provision of new retail facilities at Greater Brookfield).
- 1.42 For the Baseline (cautious) scenario, which assumes that shoppers who travel slightly further afield may change their habits in favour of new facilities at Greater Brookfield (whilst other local shoppers would be expected to continue to shop at the same destinations), the projected journeys would generate 1.11 million tonnes of carbon between 2018 and 2038. This equates to a reduction in emissions of carbon of 11.5%, relative to the Do-Minimum scenario (which excludes the provision of new retail facilities at Greater Brookfield).
- 1.43 As a guide, it has been calculated that the carbon savings calculated for the non-cautious and cautious scenarios, would be roughly equivalent to 2.2 and 2.5 million km travelled by a bus, respectively. The

analysis therefore indicates that there are expected to be air quality related benefits associated with providing retail facilities at Greater Brookfield, as this has the ability to reduce the number of longer-distance trips to other retail facilities.

- 1.44 Emissions of oxides of nitrogen, particulate matter and total hydrocarbons follow a similar pattern of change to those predicted for carbon. Although a reduction in total emissions in these pollutants is helpful in reducing background concentrations of these pollutants, it is unlikely that these emissions would translate into perceptible changes in measure concentrations at air quality sensitive locations.

Conclusions

- 1.45 Our analysis has demonstrated the significant leakage of trade to competing shopping destinations in the wider Sub-Region, generating unsustainable travel patterns, high carbon emissions and an outflow of jobs and wider economic benefits. The four centres of Waltham Cross, Brookfield, Hoddesdon and Cheshunt retain only 36% of Borough comparison goods expenditure, and this figure is set to decline following planned and committed retail and town centre investment throughout the sub-region.
- 1.46 All competing retail destinations are implementing, or have recently implemented, major town centre enhancements which will ensure a stronger positioning in the Sub-Region moving forwards; in turn leading to the continued polarisation of the larger centres and significant challenges for the Borough without corresponding improvements to its own facilities.
- 1.47 A number of Evidence Base documents in adjoining authorities have identified significant quantitative need, but not the physical sites to accommodate the full extent of these economic forecasts. Our quantitative global Sub-Regional forecasts are consistent with such conclusions which identify significant growth and 'surplus expenditure' of around £2.5billion by 2018. This is more than sufficient to support all aspirations throughout the Sub-Region in addition to proposals at Greater Brookfield which would only absorb c.£175m.
- 1.48 Brookfield has a small influence beyond the Borough boundary at the current time; with a market share of only 9.9% in the outer survey zones (5-12). This is expected to increase to only 16.2%, and whilst consolidating its catchment area, will not expand to any significant extent into adjoining centre catchment areas, i.e. Harlow and Enfield. Indeed, within the Borough boundary (Survey Zones 1-4), market share is only expected to increase from 35.9% to 57.6%.
- 1.49 Our assessment has demonstrated, through a series of sensitivity tests, that the Greater Brookfield site is the most appropriate to ensure the required critical mass of retailing to claw-back lost shoppers to the Borough. Waltham Cross, Hoddesdon and Cheshunt do not have comparable development sites and will continue to perform well in complementary roles alongside new retail growth at Brookfield. The impact assessment demonstrates no significant harm to any centre within the Borough or beyond, with

each able to achieve at least growth in real terms, together with the realisation of all strategic aspirations.

- 1.50 Greater Brookfield will, crucially, generate a significant number of new jobs within the Borough, contributing to sustained economic growth; and provide strong foundations through the enhanced quality and perceptions of the area from which to encourage higher value growth throughout the Borough in the future. Greater Brookfield is entirely consistent with policy reducing atmospheric emissions by up to 11.5%.
- 1.51 The evidence base demonstrates the need for retail growth of a critical mass in Broxbourne to recapture lost expenditure and to ensure investment of sufficient scale to generate a significant number of jobs and investment which in turn provides the platform of improved perceptions in order to facilitate and encourage future growth. Importantly, the Greater Brookfield proposed development will have the effect of clawing back longer distances, without any significant impact on the network of centres in the wider Sub-Region, whilst reducing carbon emissions.

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1. INTRODUCTION

1.1 Broxbourne Borough Council have, in recent years, commissioned a number of robust evidence base documents to ensure a proactive planning approach to their network of town centres consistent with guidance set out in PPS6 (2005) and more recently PPS4 (2009). As part of this process, the Council are also producing comprehensive 'Town Centre Strategies' which form a crucial part of the evidence base framework. This Report draws on each of the previous work stages and provides one 'bridging document' to set out the recommended strategy and implications in respect of the Borough's retail and town centre policy framework in order to inform the LDF and continued preparation of the Core Strategy.

1.2 The structure of this Bridging Report is as follows:

- **Section 2** sets out the up-to-date policy framework, taking into consideration the increasing emphasis on sustainable economic growth;
- **Section 3** discusses the Sub-Regional context, drawing on the Household Telephone Survey to identify the relationship of Broxbourne with the key competing centres; and sets out the development and policy aspirations of each respective authority;
- **Section 4** provides a detailed qualitative assessment of existing retail and leisure floorspace in the Borough and sets out conclusions drawn in respect of potential development sites or town centre extension opportunities;
- **Section 5** sets out our economic capacity forecasts for the Borough, based on current market share; and second, identifies the extent of global expenditure growth in the Sub-Region – available to support future physical growth in Broxbourne and the wider network of town centres;
- **Section 6** summarises our conclusions in respect of the network of centres, the wider sub-regional context, and capacity forecasts, and sets out our recommended retail/town centre strategy for the Borough over the LDF period;
- **Section 7** sets out the quantitative impact of proposals for Greater Brookfield on the surrounding retail hierarchy;
- **Section 8** discusses how Greater Brookfield will contribute to retail growth within the Borough;
- **Section 9** sets out the wider economic benefits of growth at Greater Brookfield in accordance with the Government Agenda for sustainable economic growth;
- **Section 10** considers the impact of Greater Brookfield in respect of atmospheric emissions/climate change; and
- **Section 11** sets out our conclusions.

2. POLICY FRAMEWORK

2.1 This section examines the key points of relevance from national, regional and local planning policy.

PPS4: Planning for Sustainable Economic Growth (2009)

2.2 PPS4 brings together all of the Government's key planning policies relating to the economy in both urban and rural areas into one single PPS. It replaces PPG4: Industrial and Commercial Development and Small Firms; PPG5: Simplified Planning Zones (which will be re-published as practice guidance); PPS6: Planning for Town Centres; the economic development policies in PPS7: Sustainable development in rural areas and car parking standard policies in PPG13: Transport.

2.3 The new policy statement (PPS4) brings the Government's town centre policies into line with its wider policies for economic development. It covers a range of policy issues including climate change, social inclusion, accessibility and inclusive design, which all feature alongside the need for an efficient, competitive and innovative retail and leisure sector. These objectives are all set within a clear overarching policy to promote sustainable economic growth.

2.4 PPS4 confirms that economic development includes development within the B Use Classes, public and community uses and main town centre uses; but add that the policies will also apply to other development which achieves at least one of the following objectives:

- Provides employment opportunities;
- Generates wealth or
- Produces or generates an economic output or product.

2.5 In the context that the Government's overarching objective is sustainable economic growth, the objectives for planning are to:

- Build prosperous communities by improving the economic performance of cities, towns, regions, sub-regions and local areas, both urban and rural;
 - Reduce the gap in economic growth rates between regions, promoting regeneration and tackling deprivation;
 - Deliver more sustainable patterns of development, reduce the need to travel, especially by car and respond to climate change;
 - Promote the vitality and viability of town and other centres as important places for communities.
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- 2.6 In planning for sustainable economic growth, regional planning bodies and local planning authorities should ensure that their development plan sets out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth. Whilst policy is encouraged to support existing business sectors, PPS4 emphasises that policies should be flexible enough to accommodate sectors not anticipated in the plan and allow a quick response to changes in economic circumstances.
- 2.7 PPS4 therefore effectively introduces an element of flexibility when considering the policy framework and development options in respect of the uses that are considered able of facilitating sustainable economic growth. In terms of employment, for example, policy does not restrict against the change of use of allocated employment land to other non-B employment uses (providing sequential tests are met).
- 2.8 The central message of PPS4 is the need for a more proactive approach to securing new investment in centres, and achieving more sustainable patterns of development. The Government's key objective for town centres is to promote their vitality and viability by:
- Focussing new economic growth and development of main town centre uses in existing centres and remedying deficiencies in provision in areas with poor access to facilities;
 - Allowing competition between retailers and enhanced consumer choice through the provision of innovative and efficient shopping, leisure, tourism and local services in town centres which allow genuine choice to meet the needs of the entire community (particularly socially excluded groups).
- 2.9 The statement advises that local planning authorities (LPAs) should use their evidence base to plan positively for growth and development by assessing the need for further main town centre uses; to identify any deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day needs; and to assess the capacity of existing centres to accommodate new town centre development taking account of the role of the centre in the hierarchy, as well as possible management of the decline/change of centres. In assessing need for retail and leisure development LPAs should take account of both quantitative and qualitative need, giving additional weight to the latter in deprived areas.
- 2.10 In assessing quantitative need for retail and leisure development LPAs should have regard to relevant market information and economic data, including a realistic assessment of population and future growth, forecast expenditure and forecast improvements in retail sales density. In assessing qualitative need LPAs should assess whether provision and distribution of shopping, leisure and local services allows genuine choice to meet the needs of the whole community (particularly those in deprived areas), in light of the objective to promote vitality and viability of town centres and the application of the sequential approach. LPAs should also take into account the degree to which shops may be overtrading and whether there is need to increase competition and retail mix.
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- 2.11 PPS4 states that, in planning for centres, regional and local planning authorities should set out a strategy for the management and growth of centres over the plan period, setting flexible policies allowing centres to respond to changing economic circumstances. LPAs should define the network and hierarchy of centres that is resilient to anticipated future economic changes to meet the needs of their catchments. Choices should be made about which centres will accommodate any identified need for growth in town centre uses, considering their expansion where necessary and the need to avoid an over concentration of growth in centres. Identified deficiencies in the network of centres should also be addressed, giving consideration to the appropriateness of designating new centres; reclassifying existing centres; planning for extensions; or scope for consolidation.
- 2.12 PPS4 encourages LPAs to proactively plan to promote competitive town centre environments and provide consumer choice by:
- supporting a diverse range of uses (including complementary evening and night-time uses) which appeal to a wide range of age and social groups;
 - planning for a strong retail mix so that the range and quality of the comparison and convenience retail offer meets the requirements of the local catchment area, recognising that smaller shops can significantly enhance the character and vibrancy of the area;
 - supporting shops, services and other important small scale economic uses in local centres and villages;
 - identifying sites in the centre, or failing that on the edge of the centre, capable of accommodating larger format developments where a need for such development has been identified;
 - retaining and enhancing existing markets and, where appropriate, re-introducing or creating new ones, ensuring that markets remain attractive and competitive by investing in their improvement;
 - taking measures to conserve, where appropriate, and enhance the established character and diversity of their town centres.
- 2.13 LPAs should identify an appropriate range of sites to accommodate at least the first five years identified need. Sites for main town centre uses should be identified through a sequential approach to site selection giving preference to locations in appropriate existing centres in the first instance, followed by edge-of-centre locations and out-of-centre sites, with preference given to those that are more accessible or have a higher likelihood of forming links with an existing centre.
- 2.14 The impact of proposed locations for development on existing centres will also need to be assessed by the LPA, taking into account impact considerations set out in Policy EC16 which include impact on town centre vitality and viability; in-centre trade/turnover; investment in centres; delivery of development on allocated sites; and any locally important impacts on centres identified by the LPA.
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- 2.15 In the determination of planning applications for main town centre uses that are not in a centre and not in accordance with an up to date development plan, PPS4 requires applicants to demonstrate compliance with the sequential approach and impact assessment taking into account the impact considerations set out in Policy EC16. Assessments of impact should focus on the first 5 years after the implementation of a proposal and should be proportionate to the scale, nature and detail of the proposed development.
- 2.16 Policy EC17.1 directs LPAs to refuse planning permission where an applicant fails to demonstrate compliance with the sequential approach or the proposal is likely to lead to a significant impact. Judgements about the extent and significance of any impacts should be informed by the development plan (where this is up to date) or recent local assessments of the health of town centres and any other published local information e.g. a town centre or retail strategy.

Regional Policy Context

East of England Plan Regional Spatial Strategy (May 2008)

- 2.17 Regional policy has been formulated through the East of England Plan Regional Spatial Strategy. The RSS was submitted to the Secretary of State in June 2006 and the Government's Proposed Changes were published for consultation between December 2006 and March 2007. Further Proposed Changes were subsequently published in October 2007 followed by an extended consultation period. The plan was formally adopted on 12th May 2008.
- 2.18 The new coalition government (May 2010) has, however, commenced proposed changes to the planning system with the intention to abolish RSS's and return powers on planning and housing to local councils. Secretary of State for Communities and Local Government, Eric Pickles, expects to make a formal announcement on this matter in the near future, but in the meantime has written to express the government's commitment and to direct Local Planning Authorities and the Planning Inspectorate to have regard to the subject letter (dated 27th May 2010) as a material planning consideration in any decisions they are currently taking.
- 2.19 It remains relevant, until such time of clarification, to briefly review the key relevant policies. Policy SS6 emphasises the importance of thriving, vibrant and attractive centres as fundamental to sustainable development and encourages local development documents to define the role of centres and include a strategy to manage change and promote a healthy mix of uses. Policy E5 defines the regional retail hierarchy, identifying the regional towns and major town centres that should be the focus for major new retail developments and complementary town centre uses. Below this level in the retail hierarchy, the RSS states that local development documents will identify a network of local, district, neighbourhood and village centres. Broxbourne's key centres, Hoddesdon, Waltham Cross and Cheshunt, are subject to the latter reference and as such their hierarchical positions are discussed further in the local planning framework.
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- 2.20 The soon to be abolished RSS acknowledges the presence of three retail destinations including the Brookfield Centre in Broxbourne, the Hatfield Galleria and Colney Fields near St Albans. Regional policy advises that Development Plan Documents should define the future role of these centres, in particular to determine whether they should develop into centres with a fuller range of service provision or remain purely retail centres. The plan highlights that the former approach should only be adopted where further development would improve social, environmental and economic sustainability and deliver improved sustainable transport accessibility.
- 2.21 The document identifies a minimum regional housing requirement in Broxbourne of 5,600 new dwellings by March 2021. Policy highlights that this allocation should be regarded as a minimum target to be achieved and the local planning authority should plan for delivery of housing for at least 15 years from the date of adoption of the relevant development plan documents, assuming an average annual rate provision after 2021 will be the same as the rates for 2006 to 2021 and 2001 to 2021, whichever is higher. Clearly, such targets will soon be abolished under the new government, with future decisions to be made by local councils.

Local Policy Context

Broxbourne Borough Council Local Plan 2001 – 2011 (December 2005)

- 2.22 The Broxbourne Local Plan was adopted in December 2005. Following changes to the planning system the Secretary of State has directed the Council to save a range of policies in the plan until they are replaced by the Council's Local Development Framework documents.
- 2.23 The local plan sets out objectives to ensure the vitality and viability of centres in the Borough are sustained and enhanced. Paragraph 5.12 sets out the hierarchy of town and local centres to assist in the consideration of proposals that are compatible with their function and position in the hierarchy. At the top of the hierarchy Waltham Cross and Hoddesdon are defined as Town Centres. Next in the hierarchy is Cheshunt Old Pond which is defined as a District Centre and hereafter referred to as Cheshunt. Below this there are seven Neighbourhood Centres and 14 Local Centres and Parades.
- 2.24 In accordance with the retail hierarchy, policy RTC1 focuses new retail development within the town and district centres and deters against retail development elsewhere unless otherwise provided for in the plan. Exceptions may be considered where sufficient need can be demonstrated and in applying the sequential test the proposed development cannot be physically accommodated within existing centres or on edge of centre sites; or in cases where proposals would not have a material impact on the vitality and viability of the town, district and local centres. New retail development at Greater Brookfield is not restricted under the provisions of Policy RTC1, and is discussed further below.
- 2.25 Chapter Six of the local plan considers the comprehensive and sustainable development of the 'Greater Brookfield' area which broadly comprises several sites known individually as Canada Fields, Brookfield

- Farm (Tesco/M&S), Brookfield Retail Park and New River Trading Estate. The Council's primary objective, as set out in paragraph 6.2.2, seeks to promote Greater Brookfield as a 'single entity for mixed use development comprising comparison and convenience retailing, leisure, business uses, housing and associated community facilities'.
- 2.26 At Brookfield Farm and Brookfield Retail Park, policy BFC3 supports continued retail use of the existing buildings and 'the introduction of A2, A3 and D2 uses, subject to the type and level of such uses remaining appropriate and subordinate to the primary use for A1 purposes'. There is also an allocation for the provision of up to 8,000 sq m retail warehouse floorspace at land west of Halfhide Lane based on the findings of the 2004 DTZ-Pieda retail study and set out in Policy BFC6. This demonstrates clear policy support for future growth at Greater Brookfield.
- 2.27 Elsewhere in the Borough, additional retail floorspace is directed towards Hoddesdon, Waltham Cross and to a lesser extent Cheshunt in line with the retail hierarchy and there is a presumption against development which could undermine objectives to maintain and enhance the vitality and viability of these centres.

Borough of Broxbourne LDF: Draft Core Strategy (November 2008)

- 2.28 In May 2007, the Council published an initial core strategy Issues and Options document setting out the key issues faced by the Borough and a range of options for how to tackle them. Public consultation on the issues and options concluded in late June 2007. Following this, the Council has prepared a second Core Strategy paper presenting the long-term vision for the area and the Council's priorities in managing and directing change. The document was published for consultation in November 2008, underpinned by the relevant previous evidence base documents produced by GVA Grimley, and was available for review until 27 February 2009.
- 2.29 Brookfield is recognised as a significant centre which has become an established part of the retail network serving the Borough. Reflecting conclusions drawn in the 2008 Retail Study, the Core Strategy recognises that the Borough is highly dependent on major shopping centres outside its boundaries, such as Harlow, Welwyn Garden City and Enfield. The existing centres are acknowledged as serving a local market, providing convenience goods (food) and services but only a limited choice in terms of non-food shopping (comparison goods). The Draft Core Strategy identifies the Brookfield Centre as the most important shopping location in the Borough and is estimated to have the largest share of non-food expenditure. The unsustainable nature of expenditure leakage to competing centres is highlighted.
- 2.30 Proposals for strategic growth at Brookfield is clearly set out in the draft Core Strategy:

“...will provide approximately 600 dwellings and a new Borough retail centres to reduce the significant amount of retail leakage to centres outside of the Borough. The development would include a significantly higher quality retail offer, a variety of

leisure uses and a relocation of the existing gypsy and travellers site, allotments and, possibly, the Council's base for recycling and street scene operations."

- 2.31 Policy CP 3 encourages retail centre development; including Greater Brookfield provided that it delivers a sustainable and high quality centre which reduces the need to travel outside the Borough. The policy states that it must provide a mix of uses including retail, employment, housing and leisure; serve the comparison and specialist shopping needs of both residents and workers of the Borough ;and continue to serve the convenience shopping needs of residents and workers both in and neighbouring the centre. The policy puts the onus on the findings of this Bridging Report to indicate the precise amount of retail development allowed.
- 2.32 Policy CP 3 permits development at Waltham Cross and Hoddesdon provided that it maintains their roles as town centres and aids in improving their vitality and viability by diversifying their economies e.g. promoting a night time economy at both centres. In order to boost the role of Waltham Cross as a destination for convenience shopping the Council will promote the provision of additional food retail floorspace in its Site Allocations DPD. With regard to Cheshunt, development will be permitted provided that it maintains its role as a district centre and aids in improving its vitality and viability.
- 2.33 The document sets out proposed retail policies. CP17 'Retail Development' directs new retail towards the Borough's centres including Greater Brookfield, defined as the 'Borough Centre'. The policy requires the scale and nature of retail development to be consistent with the role and function of each of the centres and should be supported by Retail Impact Assessments to demonstrate that the proposed development will not have an adverse impact on vitality or viability of other centres and fulfil sustainability criteria. This assessment is specifically considering this issue, and assessing whether differing levels of growth will have an adverse impact on the vitality and viability of other centres in the borough.
- 2.34 In line with national guidance and the sequential test, sites at the edge of centres will be considered, followed by out of town centre sites if it can be demonstrated that no suitable and viable sites exist in the identified centres. Reflecting the conclusions of the previous GVA study, which identified only limited and small scale development opportunities in other centres in the Borough, this study provides a robust assessment to inform the appropriateness of the scale and nature of future development at Greater Brookfield.
- 2.35 Policy CP18 refers to the Brookfield Strategic Development Site and sets out the core development requirements:
- A mixed use development with a full range of service provision thereby reducing the need to travel outside the Borough;
 - Make provision for leisure and community facilities that include a cinema and ten pin bowling alley;
 - Enhance public transport links and reduce congestion in the local area;
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- Provide better pedestrian linkages between the existing components of the centre and between the existing and proposed developments;
- Provide a mix of dwelling sizes, types and tenures for both market and affordable housing;
- Provide additional pitches for Gypsy and Travellers; and
- Provide replacement facilities for those displaced by the development.

2.36 In respect of recreation and leisure, the Draft Core Strategy (2008) recognises major leisure facilities to be developed in the Lee Valley as part of the Olympics and Legacy Olympic proposals. Notably, the Olympic Lee Valley White Water Centre is positioned at the Showground site in Waltham Cross; representing a long term leisure investment for the Borough.

Summary

- PPS4 (2009) sets out the Government's clear policy to promote sustainable economic growth, including development within the B Use Classes, public and community uses and main town centre uses. The overarching policy thrust is to sustain and enhance the vitality and viability of existing centres, wherever possible, and to plan positively for new development within them having regard to the role and needs of their catchments. LPAs are urged to set out a strategy for the management and growth of centres over the plan period, identifying means to accommodate identified need for growth and any deficiencies in the network of centres, with consideration given to the appropriateness of new centres or planning for extensions.
- The RSS was adopted in May 2008, but is soon to be abolished under the new coalition government who have written to confirm this long-standing commitment. Until such time of clarification (apparently in the near future), LPA's and the Planning Inspectorate are directed to have regard to the subject letter as a material planning consideration. In any event, the 2008 RSS directs the local authority to define the future role of the Brookfield Centre.
- The Draft Core Strategy (2008) recognises that the Borough is highly dependent on major shopping centres outside its boundaries, and that the Brookfield Centre is the highest level shopping location in the Borough. The main centres of Hoddesdon and Waltham Cross are identified as having local markets, and are unable to compete at that level. The document encourages the sustainable growth of Greater Brookfield, providing a mix of uses and reducing the need to travel outside the Borough; and permits development at Waltham Cross and Hoddesdon providing it improves their vitality and viability. Cheshunt is directed to maintain its role as a District Centre.
- The Core Strategy sets out proposals for growth at Greater Brookfield, which include a mix of uses and promotes sustainable economic growth, objectives which accord with the RSS and PPS4. The document emphasises that applications for development should be supported by a Retail Impact Assessment to demonstrate that the proposed development will not have an adverse impact on the vitality and viability of other centres in the borough.

3. SUB-REGIONAL CONTEXT

- 3.1 This section compares the role of the centres in Broxbourne with centres in the wider region. In particular it analyses the influence of key competing centres on the current and future role of Hoddesdon, Waltham Cross, Cheshunt and Brookfield. Our analysis draws on the household telephone survey results and other data sources including PROMIS, Javelin Retail Ranking, Focus Property Intelligence Database and EGi to identify the main retail offers and floorspace provision, and the extent to which this is likely to change and influence shopping patterns in the future.
- 3.2 It is clear from Table 3.1 that the centres within Broxbourne are ranked well below many of the surrounding competing centres. They also have a considerably lower retail floorspace and they do not register on published data indicating rents and yields. The Brookfield Centre ranks higher than Cheshunt district centre and is comparable to Hoddesdon town centre. Waltham Cross is the highest ranked centre in the Borough.

Table 3.1: Competing Centres: Key Indicators

Centre	Javelin Rank (2007)	Retail Floorspace (Sq m Gross)	Rents 2007 (£ per sq m)	Yields 2008 (% change)
Bluewater	28	144,018	4,467	5
Watford	37	144,678	3,337	5.25
Lakeside	71	130,798	3,875	4.75
Stevenage	113	81,674	1,238	6.5
Harlow	149	92,336	1,076	5.75
Enfield	183	56,866	1,615	5.75
Welwyn Garden City	202	50,600	1,184	7
Waltham Cross	479	39,614	-	-
Hertford	502	46,619	646	8.5
Hoddesdon	663	35,600	-	-
Brookfield	740	28,159	-	-
Hatfield	990	55,788	-	9
Cheshunt	1304	19,640	-	-

Source: Javelin/Experian Goad/VOA/Colliers NB: There is no published data indicating rents/yields for some centres.

- 3.3 Shopping patterns derived from the household telephone survey (Appendix 1) enable us to calculate the amount of comparison goods expenditure that each competing centre draws from the defined survey area (Appendix 2 and Plan 2). As well as the strength of the retail offer this indicator takes into consideration accessibility and distance from Broxbourne's catchment area. The total expenditure leaking to these centres is highlighted in Table 3.2 (and in Appendix 2).

- 3.4 The household telephone survey highlights the influence of Enfield, Harlow and Welwyn Garden City in respect of comparison shopping (as demonstrated by Table 3.2). The influence of higher order centres on shopping patterns is illustrated by the fact that 34.4% of all respondents last shopped for comparison goods in Enfield, Harlow or Welwyn Garden City. The total expenditure on comparison goods in the study area is £953.3m. Of this, £122.8m (12.9%) is going to Enfield, £121m (12.7%) is going to Harlow and £74.1m (7.8%) is going to Welwyn Garden City.

Table 3.2: Study Area Comparison Goods Expenditure Flow to Key Competing Centres

Centre	Comparison Goods Expenditure (£000)	% Total Available Comparison Goods Expenditure
Enfield	122,795	12.9
Harlow	121,024	12.7
Brookfield	79,404	8.3
Welwyn Garden City	74,127	7.8
Waltham Cross	62,735	6.6
Hertford	34,440	3.6
Stevenage	23,672	2.5
Hoddesdon	17,115	1.8
Lakeside	15,335	1.6
Hatfield	12,150	1.3
Cheshunt	9,442	1.0
Watford	4,735	0.5
Bluewater	5,013	0.5

Source: GVA Household Telephone Survey, April 2008

- 3.5 Approximately £20.3m (2.1%) is currently going to out of centre shopping complexes at Lakeside and Bluewater. Other competing centres such as Hertford and Stevenage also have some influence with a market share of 3.6% and 2.5% respectively. This is less than Brookfield (8.3%) and Waltham Cross (6.6%) but greater than Hoddesdon and Cheshunt drawing less than 2% (each) of the comparison goods expenditure. Hatfield and Watford have minimal influence, each with a market share of 1.3% and 0.5% respectively. It is evident that the four centres in Broxbourne have a combined draw of approximately £168.7m of total available comparison goods expenditure (17.7%) from within the survey area. The location of each centre in relation to Broxbourne is illustrated in Plan 1.
- 3.6 Through a detailed analysis of the household telephone survey results we are able to illustrate the trade leakage and retention from the core survey zones (zones 1-4) and the outer catchment area (zones 5-12), and set this out in Table 3.3. It is evident that within the core catchment area, the major competing centres and retail parks are taking a significantly larger proportion of comparison goods expenditure than Broxbourne's three town centres and the Brookfield centre combined (35.9%). Within the total survey area (Zones 1-12), only 17.6% is being retained by Hoddesdon, Waltham Cross, Cheshunt and Brookfield combined.

Table 3.3: Core Area and Outer Catchment Area Current Market Share (%)

Centre	Core Area (Zones 1 – 4) Market Share (%)	Outer Catchment Area (Zones 5 – 12) Market Share (%)	Total Survey Area (Zones 1 – 12) Market Share (%)
Brookfield	17%	4.7%	8.3%
Hoddesdon / Waltham Cross / Cheshunt	18.9%	5.2%	9.3%
Total Brookfield / Hoddesdon / Waltham Cross / Cheshunt	35.9%	9.9%	17.6%

Source: GVA Household Telephone Survey, April 2008

Profile of Competing Centres

Enfield

- 3.7 Enfield is designated as a Major Centre in the London Plan 2008 (a classification that has been carried forward in the consultation draft replacement London Plan 2009) and is located approximately 13 km to the south of Greater Brookfield via the A10. Enfield is most dominant in Zones 7 and 8 of the survey area with a market share of 38% and 41.1% respectively; but also has a relatively significant influence in Zones 3 (11%), Zone 4 (6.1%), Zone 6 (4.7%), and Zone 9 (7.6%). There is also a small level of influence in each of the remaining Survey Zones further afield, and the Greater Brookfield scheme is likely to contribute to more sustainable travel patterns, preventing the need for shoppers to travel longer trip distances.
- 3.8 Enfield has a total retail floorspace of approximately 57,300 sq m gross (Experian Goad, 2008), comprising convenience, comparison, service and vacant units. This equates to c.236 individual units. The town has a reasonable range of multiple retailers including WH Smith, Boots, Robert Dyas, Monsoon, Top Shop, River Island, as well as Marks & Spencer and the independently run Pearsons department store which both anchor the centre. Tesco and Waitrose are the key convenience attractors complemented by a selection of smaller foodstore operators.
- 3.9 At the time of the Council's Retail Study (March 2007) vacancy rates in the town centre stood at only 3.6% and have since risen to 8% (March 2008). This remains below the national average of 10.5% indicating the strong performance and attractiveness of the centre. Rents have remained constant in recent years, and yields have improved demonstrating a growth in investor confidence. The most up-to-date borough wide retail assessment concluded that Enfield could enhance its performance by improving the range of clothing and footwear retailers, the leisure offer and overall 'shopper experience', and customer car parking. Brent Cross and Central London are identified as the key competitors, both

- of which are moving forwards with enhancement and expansion plans. The Palace Xchange shopping centre which opened in 2006 is acknowledged as consolidating Enfield's position and market share.
- 3.10 The Council produced the Strategic Growth Options Report (March 2009). In this document the Council set out their initial aspirations for the area around Enfield station and state that new retail led mixed use development will be concentrated in the east of the town centre around the station. The intention is to deliver an improved public transport interchange between rail and other forms of transport, improve accessibility to the centre and to create a high quality new urban environment and gateway to the town which complements its historic core.
- 3.11 The Council are now moving forwards with further master planning work for this area to guide development and will set out further detail on the preferred approach in the Enfield Town Area Action Plan. The Council state that the document will provide a coordinated framework for future change and development in the area, to ensure that new development and traffic improvements complement and enhance the centre's historic and environmental quality. The note in particular, the key opportunity for significant new development and improvements around Enfield Town station, which is a key gateway to the town.
- 3.12 The Council published the Retail Study Update (December 2009), which identifies significant growth and major development opportunity sites to bring forwards over the forthcoming LDF period. The document states that despite the recent developments at the PalaceXchange in Enfield and the extension to the Edmonton Green Shopping Centre, there will be significant surplus expenditure to support an additional 46,856 sq m gross comparison by 2020 in a low population growth scenario, growing to 77,588 sq m gross by 2025. In the high population growth scenario, this rises to 54,771 sq m gross by 2020 and again to 90,663 sq m gross by 2025. These figures take into account commitments and demonstrate the significant growth in expenditure expected to take place in the catchment area.
- 3.13 The Retail Study concludes that the Railway Station environs is the key opportunity that could deliver additional retail floorspace, and together with a number of smaller sites (deemed reasonable to good) existing opportunities could accommodate up to 17,000 sq m gross in total. There are clearly physical opportunities to enhance the town centre in the future, and through the LDF and strategic policy formulation the Council are creating the framework to actively promote improvements to the already strong town centre. These measures will consolidate Enfield's position in the longer term.
- 3.14 Nevertheless, the Retail Study concludes that the longer term cumulative floorspace requirement to 2025 could be between 85,000 to 100,000 sq m gross (comparison and A2-A5 space). This longer term requirement is confirmed as being based predominantly on projected growth in expenditure per capita and the maintenance of Enfield's market share of expenditure. The analysis demonstrates strong opportunities for Enfield town centre to enhance it's offer, position and role, as well a significant amount of growth over and above identified development opportunity sites.
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Enfield Retail Parks

- 3.15 There are three major retail parks in Enfield; the Enfield Retail Park and the Coliseum Retail Park just off Great Cambridge Road, and De Mandeville Gate Retail Park located at the junction of Southbury Road and Great Cambridge Road.
- 3.16 Enfield Retail Park is located approximately 1.5 km north east of the Enfield town centre boundary as defined on the Enfield UDP Proposals Map. It is anchored by a Sainsbury's supermarket situated to the south of the other units including Homebase, Comet, Halfords, Sports World, JJB Sports, Currys, TGI Fridays and Toys R Us. The Coliseum Retail Park is anchored by a B&Q warehouse and also offers Gala Bingo, McDonalds Drive Thru and a Krispy Kreme Drive Thru. At the time of the Council's Retail Study (March 2007) a fourth unit was vacant.
- 3.17 Enfield Retail Park is most dominant in Zones 7 and 8 of the survey area with a market share of 12.4% and 18% respectively. It also has a fairly significant level of influence in Zone 3 (6.9%), Zone 4 (6.8%) and Zone 6 (5.3%). There is also a small level of influence in each of the remaining Survey Zones with the exception of Zone 11 (0%). Coliseum Retail Park has a much lower market share. It is most prevalent in Zones 7 (3.7%) and 8 (3.8%), but has a low level of influence of all of the remaining Zones with the exception of Zone 12 (0.0%), largely as a consequence of the limited range of goods and retail offer.
- 3.18 De Mandeville Gate Retail Park is located approximately 1.5 km east of Enfield town centre boundary as defined on the Enfield UDP Proposals Map. De Mandeville Gate Retail Park is anchored by a Morrison's supermarket. To the east of the Morrison's unit there are four further units occupied by PC World, Harveys and Argos. At the time of the Retail Study 2007, the fourth unit was vacant. To the south of the Morrison's store there are three more units occupied by DFS and Magnet, with the third lying vacant. It has a low market share in the survey area, and is most dominant in Zone 10 where it has a market share of only 2.6%.
- 3.19 Combined, the out-of-centre retail parks in Enfield have a reasonable level of influence in the Broxbourne survey area, selling a mix of bulky and town centre goods. On this basis, the proposals at Greater Brookfield are likely to claw back some of this trade, particularly that leaking from Zones 3 and 4, although we emphasise that the floorspace is out-of-centre and impact on this is not a material planning consideration.

Harlow

- 3.20 Harlow is designated as a Key Centre for Development and Change in the East of England Regional Spatial Strategy 2008 (soon to be abolished under new coalition government) and is located approximately 20 km to the north east of Greater Brookfield. Harlow is most dominant in Zone 5 of the Broxbourne survey area with 50% market share. It also has a significant influence in Zone 1 (35.2%),
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- Zone 2 (17.5%), Zone 6 (12.4%), Zone 11 (15.2%) and Zone 12 (26.5%). The town centre has a marginal level of influence in each of the remaining Survey Zones with the exception of Zone 9, where the town centre has almost no influence (0.3%) given its distance. The regional policy position aims to facilitate the enhancement of the centre and consequent increase in influence on shopping patterns.
- 3.21 Harlow has a total retail floorspace of approximately 96,000 sq m gross (Experian Goad, 2008), comprising comparison, convenience, service and some vacant units. This equates to c.298 units. The town has a good range of multiple retailers including Bhs, M&S, Monsoon / Accessorise, WH Smith, New Look, Boots, Clarks, Topshop, Jane Norman, Dorothy Perkins, Next, HMV, River Island, Primark, Wilkinson, Matalan and TK Maxx. There are two managed shopping centres – the Harvey Centre which opened in 1982 (33,444 sq m gross) and Water Gardens which opened in 2003 (27,871 sq m gross). Tesco and Asda are the key foodstores serving the town. Harlow appears to have suffered somewhat from the recession, reflecting higher than average vacancy rates, a fall in rental levels and a drop in the Javelin retailer rankings.
- 3.22 Nevertheless, there are a number of policy developments facilitating future change and enhancement to the centre. The Town Centre North Project is a major regeneration initiative for the northern quarter of Harlow's town centre. It is hoped that the planned redevelopment will transform the town centre, helping to improve the quality and attractiveness of Harlow's shopping experience. The Council previously produced a Draft Town Centre Strategy for Harlow (December 2006) which aimed to establish a clear vision for the town and to address fundamental design issues affecting Harlow. This scheme is designed to respond to the conclusions drawn.
- 3.23 The redevelopment will re-integrate Harlow Town Centre North with the rest of the town centre and include proposals for new shops, a hotel, businesses and homes as well as new public spaces, a new bus interchange, a new library and new entertainment facilities. The plans total approximately 120,000 sq m of new development, incorporating a significant amount of retail, department store and foodstore. It is hoped the plans will result in a major change in the retail offer for the town, transforming Harlow into a stronger, more appealing shopping centre in accordance with the RSS objectives. The developers have recently pulled out, but the Council will continue to facilitate the development of area.
- 3.24 The proposals are intended to counterbalance the impact of the Water Gardens which has shifted the emphasis of the town centre to the south. The scheme will therefore uplift the health of the centre as a whole, also contributing a range of additional leisure uses as recommended in the Council's Retail Study (2007) and including food and drink operators. We understand that the Council are considering updating the Retail Study to underpin significant progress to their future aspirations. Current policy formulation and major development aspirations will only enhance Harlow's position in the future, consolidating its position at the higher level in the regional retail hierarchy. The Council have recently commissioned a new Retail Study to provide an up-to-date element of the evidence base; this will be completed during the summer 2010.
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Welwyn Garden City

- 3.25 Welwyn Garden City is designated as a Major Town Centre and a Key Centre for Development and Change in the East of England Plan 2008 (soon to be abolished under new coalition government). It is located approximately 25 km to the north west of Greater Brookfield, and is most dominant in Survey Zones 9 and 10 with a market share of 21.7% and 25.6% respectively. It also has significant market share in Zone 12 (18.0%), Zone 11 (14.6%), and Zone 3 (9.8%). It has a lesser influence in Survey Zone 1 (6.5%), Zone 2 (8.2%), Zone 4 (1.3%), Zone 5 (4.8%), Zone 6 (1.0%) and Zone 8 (2.6%). The town centre has no influence in Survey Zone 7.
- 3.26 Welwyn Garden City has a total retail floorspace of approximately 50,500 sq m gross (Experian Goad, 2008), comprising convenience, comparison, service and retail units, equating to c.187 individual units. The town has a strong range of multiple retailers, including WH Smith, Boots, Argos, Superdrug, Sony Centre, Burton, Monsoon, New Look, Dorothy Perkins, Top Shop and Next. The town also has two department stores – Marks & Spencer and John Lewis. Sainsbury's, Waitrose and Iceland are the key convenience stores in the town.
- 3.27 The town appears to have been particularly resilient to the economic downturn – vacancy rates have remained almost unchanged since 2007 and remain at a very low level in comparison with the national average. While rental levels have dropped and yields have moved out, they have only done so by a relatively small margin. The town has fallen marginally in the Javelin rankings, but only by 14 points, and retailer demand levels are competitive with the other competing centres.
- 3.28 The Retail and Town Centre Needs Assessment (November 2007) suggests that the town would benefit from a better range and quality of facilities in order to make it more competitive with Stevenage and the nearby Hatfield Galleria. It also identifies room for improvement in the evening economy and the quality of current retail accommodation. However, it also states that there is a good selection of shops and services and that the structure of the centre does encourage shoppers to most parts of the town centre during their shopping trips. The Council are progressing with policy formulation and town centre strategy measures to build on these strengths. The Council will be preparing an Area Action Plan to be 'twin tracked' with the Core Strategy, and work is likely to commence on this document in 2010.

Hertford

- 3.29 Hertford acts at a lower level in the regional retail hierarchy compared to Enfield and Harlow. It currently has no designation in the RSS (soon to be abolished under new coalition government), although the East Hertfordshire Retail Study (August 2008) recommends that the town is designated as a Secondary Town Centre. It is located approximately 14 km to the north of Greater Brookfield and has some influence within a small number of the survey zones. Notably, Hertford has a market share of 20.2% in Zone 10, 13.1% in Zone 11 and 10.7% in 12. There is little influence within the remainder of the survey area.
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- 3.30 Hertford has a total retail floorspace of approximately 47,000 sq m gross (Experian Goad, 2008), comprising comparison, convenience, service and some vacant units. This equates to c.269 individual units, including eight key anchors: Waitrose, Marks & Spencer Simply Food, Boots, New Look, Clinton Cards, Woolworths and WH Smith (East Herts Retail Study 2008). Clearly, since the report was published, Woolworths has gone into administration and all of its stores nationwide have closed, but the mix of retailers remains strong for a lower order centre.
- 3.31 According to the East Herts Retail and Town Centres Study 2004, the vacancy rate as at 2003 was c.3%, well below the national average of 10%. Having updated the key figures, vacancy by total units for the town has since risen to 7% (December 2008), but this remains below the national average which points to a strong performance and a healthy town centre in the context of this economic climate. Rents have fallen marginally, but again, this is consistent with current trends across the UK. According to the Javelin retail rankings, Hertford's position for 2009 stands at 443, up 59 positions from number 502 in 2008. This reflects the continued strong performance of the town centre within the sub-regional retail hierarchy and across the UK.
- 3.32 There is currently one key retail scheme coming forwards in Hertford, which indicates further growth in the future. In late 2008, Sainsbury's submitted an application to redevelop the Brewery Site, identified in the East Herts Retail Study 2008 (ref: 2008/1528). The development will include a foodstore (2,328 sq m net retail floorspace), café, offices and commercial space and community space. The application was called-in by the Secretary of State and subsequently granted consent. There are no major comparison goods developments coming forwards, although the retail provision is strong for a more secondary centre.

Stevenage

- 3.33 Stevenage is designated as a Major Town Centre and a Key Centre for Development and Change in the East of England Plan 2008 (soon to be abolished under new coalition government) and is located approximately 29 km to the north of Greater Brookfield. Stevenage is most dominant in Zone 11 where it achieves a market share of 14.4%. It has less influence in all of the remaining Survey Zones, with its second highest level of dominance being 7.1% in Zone 10. It has limited influence in Zones 9 and 12 with 2.8% and 2.9% respectively, and market share in the remaining Survey Zones range from 0-0.5%.
- 3.34 Stevenage has a total retail floorspace of approximately 81,700 sq m gross (Experian Goad, 2008), comprising convenience, comparison, service and retail units, equating to c.225 individual units. The town has a fair range of multiple retailers, including Next, Miss Selfridge, Topshop, Costa Coffee, Boots, River Island, Primark, TK Maxx and New Look, as well as Marks & Spencer and Bhs variety stores. Iceland and Tesco Extra form the key convenience attractors to the centre. Like Harlow, Stevenage has suffered somewhat from the economic downturn, experiencing a growth in vacant units and falls in rental levels, although the centre has fallen only marginally in the Javelin retail rankings from

- 113 in 2008 to 124 in 2009; and retailer demand levels are competitive compared to the other competing sub-regional centres.
- 3.35 The Retail Capacity Assessment (June 2007) indicates that Stevenage would benefit from a department store and a greater mix of higher quality multiple retailers, and recognises the significant competition from out-of-centre retailing throughout the borough. In this context the Council are progressing with policy formulation and town centre strategy measures to build on the existing strengths and address the identified weaknesses. Notably, it recognised that there is much under-utilised space in Stevenage town centre which presents an opportunity for the strategic and comprehensive development of complementary retail uses. This is consistent with the town's designation for growth in the RSS and consequent increase in population and expenditure levels.
- 3.36 In January 2010, the Council published their retail study update which identified comparison goods capacity for 100,000 – 140,000 sq m gross floorspace to 2026. The Council also published the Area Action Plan for Stevenage town centre in January 2010 to facilitate future investment and development. A number of redevelopment opportunity sites have been identified, although it is apparent that the growth in expenditure in 2026 (140,000 sq m additional) is unlikely to be accommodated within the plan for the town centre.

Hatfield

- 3.37 Hatfield is also designated as a Key Centre for Development and Change in the East of England Plan 2008 (soon to be abolished under new coalition government). It is located approximately 37 km to the west of Greater Brookfield, and has little influence throughout the Survey Zones. The highest market share is identified in Zones 9 and 11 (3.8% and 3.9%). It also has marginal influence in Zones 10 and 12, with a market share of 3.2% and 1.9% respectively. Market share in the remaining Survey Zones is 1% or less.
- 3.38 Hatfield has a total retail floorspace of 64,800 sq m gross (Experian Goad, 2008), comprising convenience, comparison, service and vacant units. This equates to c.225 individual units, with major national comparison retailers in the town centre including New Look, Clinton Cards, Boots, Specsavers and Superdrug. An Iceland and a large Asda supermarket are the key convenience retail attractions.
- 3.39 Vacancy rates were recorded at only 9.3% in 2008, which remains below the national average, and retail yields have remained relatively static, rising only marginally as a consequence of growing economic and investor uncertainty. The Retail and Town Centre Needs Assessment (November 2007) recognised that the centre could be much improved through enhancement to the physical fabric of the centre and an improved mix and range of retailers. This is being addressed through proposals for Town Centre East with the aspiration to provide a new town square, modern shopping facilities, restaurants, bars, an indoor market hall, improved transport infrastructure and new homes. Proposals have been guided by the Hatfield Town Centre Planning Brief (2002).
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- 3.40 St Modwens Developments Ltd had been pursuing the £120m regeneration for a large mixed-use scheme for Town Centre East, but this was put on hold due to the economic downturn. The partners remained committed to delivering the project, however, and in April 2010 planning consent was granted for the scheme which includes the creation of a new high street in the town centre, as well as 97 residential units, 8,000 sq m of retail space, new town square, a bus interchange and taxi rank. The proposals will be realised to the benefit of Hatfield and the town centre's role in the retail hierarchy.

Watford

- 3.41 Watford is designated as a Regional Centre and a Key Centre for Development and Change in the East of England Plan 2008 (soon to be abolished under new coalition government). It is located approximately 39 km to the south west of Greater Brookfield, and given this distance has little influence in any of the Broxbourne Survey Zones. Its largest market share of 1.9% is in both Zone 8 and 9. All the remaining Survey Zones have a market share of 0.9% or less.
- 3.42 Watford has a total retail floorspace of 149,200 sq m gross (Experian Goad, 2008), making it the largest competing centre. It comprises convenience, comparison, service and vacant units, equating to c.434 units. The range and mix of retailers is strong and includes John Lewis department store, Waterstones, Zara, Coast, Millets, Starbucks, HMV, Early Learning Centre, Pumpkin Patch, Laura Ashley, Monsoon, H&M, Clarks, Next, Argos, Bhs, Marks & Spencer, Primark and TJ Hughes. Key foodstores include Iceland and Sainsbury's.
- 3.43 Vacant rates are currently in line with the national average, and like elsewhere in the UK, Prime Zone A rental levels have been affected by the economic downturn. Retail yields have, however, remained constant and the town centre has only fallen four positions in Javelin's retail rankings. Retailer demand remains high compared to other competing sub-regional centres in the catchment area. The Council are in the early stages of policy formulation for the town centre, and is scheduled to prepare an Area Action Plan. A Masterplan is currently being undertaken for the Town Hall end of the Town Centre, which will enhance a specific area to the benefit of the centre as a whole. Given the distance of the centre and the scale and status of its position in the sub-regional retail hierarchy, we consider that the Greater Brookfield proposals will have a negligible impact on Watford.

Summary

- The Sub-Regional Assessment demonstrates the influence of the major comparison shopping destinations on those living in Broxbourne, particularly Enfield, Harlow and to a lesser extent Welwyn Garden City. Within Core Zones 1-4 (those zones broadly reflecting the Borough boundary), the Borough centres including Waltham Cross, Hoddesdon, Cheshunt and Brookfield retain only 36% of comparison goods expenditure, reflecting the significant leakage of trade from the Borough.

- It is evident that the major competing centres are also embarking on proactive strategies and major strategic town centre development options which will further enhance their offer and overall vitality and viability. Enfield are preparing the Town Centre Area Action Plan; Harlow continue to facilitate proposals for the Town Centre North site; Welwyn continue to plan for the town centre Area Action Plan; Hertford has granted consent for a major mixed use Sainsbury's led scheme; Stevenage have published their Area Action Plan and identified significant capacity; Hatfield have granted consent for the Town Centre East redevelopment, and Watford are preparing an Area Action Plan and publishing updated retail capacity work.
- In summary, the major competing centres to Broxbourne capture a significant amount of trade from the Borough and are all implementing, or have recently implemented, major town centre enhancements which will ensure a stronger positioning in the Sub-Region moving forwards. Those retail capacity studies underpinning the respective evidence base documents have also identified significant growth in expenditure, with identified site opportunities not sufficient to meet the full extent of capacity projected in the Sub-Regional system.

4. THE BROXBOURNE CENTRES

- 4.1 In order to develop a retail and town centres strategy for the Borough, particularly the defined centres of Waltham Cross, Hoddesdon and Cheshunt, we have examined the role of the established centres and their relative function to the network of competing higher order centres; undertaken health checks of each of the centres, and examined the physical capacity for meeting retail and other town centre needs within defined centres in the Borough. Convenience and comparison goods market share plans for Waltham Cross, Brookfield, Hoddesdon and Cheshunt are attached in Appendix 3. These supplement this Section and demonstrate the strength of each centre in respect of these goods types.

Hoddesdon

- 4.2 A detailed health check of Hoddesdon Town Centre was undertaken within the 2008 Retail Study, leading to a number of key conclusions. The town centre sits at the top of the Borough retail hierarchy alongside Waltham Cross, both defined as 'Town Centres'. In terms of the diversity of uses, the number of comparison and convenience outlets is below the national average, although the centre does have a strong range of foodstores including Tesco Express, Aldi and Sainsbury's. The large Sainsbury's was found to be trading particularly well, whilst top up offer has a more limited turnover but does trade adequately. There is an above average number of service retail outlets occupying 50% of total units.
- 4.3 This mix of uses is reflected in the telephone survey results, in which the main reason for visiting the centre is main food shopping (63.4%); top up food shopping (29%); financial services (17.6%); and clothing/footwear (16%). When asked where respondents undertake most of their shopping for clothing and footwear, only 0.6% stated Hoddesdon. Within Zone 1, the Zone in which Hoddesdon is located, only 2.1% cited the town centre, whilst 28.1% stated Brookfield, and 39.6% stated Harlow.
- 4.4 The strong convenience and service provision suggests a transition to a more local top-up town centre catering for everyday requirements, although the Tower Centre may enhance the range of multiple comparison retailers once complete. The market, with approximately 50 stalls, operates on a Monday and Wednesday. It is evident from the telephone survey results that 18% of visitors to Hoddesdon only visit on market day, demonstrating the important role the market plays in the health of the town centre.
- 4.5 Hoddesdon has a reasonable range of evening economy destinations such as pubs and restaurants, which we understand from the Council has improved in recent years. It is evident from the household telephone survey that 29.4% of respondents in Zone 1 visit Hoddesdon most often for pubs/clubs; 12.7% visit for evening entertainment; and 33.3% visit for restaurants. The main competing destinations appear to be London, Hertford, Harlow and Ware. This is a growth sector and should be encouraged in Hoddesdon to enhance both the daytime and evening economy whilst drawing on policy control measures to prevent undesirable uses such as A5 take-aways.
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4.6 Overall, the importance of food retailing, the market and service operators are crucial to the vitality and viability of Hoddesdon town centre. Consistent with the GVA 2005 study, we conclude that Hoddesdon is not performing as a comparison shopping destination. Based on retail trends, and limited development opportunities in the centre, this is unlikely to change significantly in the future, although the Tower Centre may go some way to consolidating market share, although is not of a scale to create a step change in retail offer. We consider that the retail function of Hoddesdon is likely to consolidate, and looking ahead the main focus of the centre will be for convenience shopping, local services and eating/drinking – continued investment in the quality of the environment will be crucial.

Table 3.3: Vitality and Viability of Hoddesdon: Key Conclusions

Hoddesdon: Strengths/Opportunities	Hoddesdon: Weaknesses/Threats
<ul style="list-style-type: none"> • Identified as a key centre serving the north of the borough; • The centre has a strong convenience offer (Tesco, Aldi and a larger Sainsbury's) – 63.4% of visitors state that this is the main reason they visit the centre; • Street market has c.50 stalls, twice a week, and 18% of visitors only visit on market days; • Performs well in the evening economy sector, particularly in core Zone 1. Over 29% visit for pubs and 33% visit for restaurants – potential for appropriate growth; • Redevelopment of the Tower Centre offers some opportunity to enhance the range of multiple comparison retailers – although not sufficient to significantly increase market share; • Pleasant, attractive, and in some areas, attractive shopping environment. Fully pedestrianised high street and evidence of on-going investment in the public realm; • Fall in vacant units since 2006, and this will decline further following the occupation of the newly refurbished Tower Centre. 	<ul style="list-style-type: none"> • Number of comparison retailers is below the national average. This sector is weak, particularly in the clothing and footwear category – Only 16% of visitors state this as their main reason for visiting the centre; • The centre does not perform as a comparison shopping destination, and the presence of multiple comparison retailers in the town centre is limited; • No evident potential sites for retail development or opportunities to expand the primary shopping area/centre boundary'; • An above average number of fast-food take-aways. Risk of an increase in numbers, and this should be controlled through policy and the Use Classes policy, i.e. no A5 uses.

Waltham Cross

4.7 A detailed health check of Waltham Cross was undertaken in 2008. Waltham Cross sits at the top of the Borough retail hierarchy alongside Hoddesdon, defined as 'Town Centres'. In terms of the diversity of uses, and opposite to our findings in Hoddesdon, the number of comparison and convenience outlets is above the national average, whilst service operators are marginally below national average. Convenience provision is limited to a small Sainsbury's foodstore in the Pavilions Shopping Centre but

- there is a good range of smaller independent retailers. Considering the relatively small size of the centre the town has a reasonably good representation of comparison national multiple retailers.
- 4.8 Like Hoddesdon, this retail mix is reflected in the results of the telephone survey, in which the main reasons for visiting the centre is clothing and footwear (44.4%); main food shopping (27.8%); top up food shopping (23%); personal/luxury goods (12.7%); and financial services (10.3%). The dominance of clothing and footwear compared to Hoddesdon is evident.
- 4.9 The comparison goods role and level of influence is reasonable for a centre of this size and level in the Borough's retail hierarchy, and the clothing and footwear offer is playing an important role in maintaining the vitality and viability of Waltham Cross town centre. The strong influence of Brookfield is considerable in respect of clothing and footwear and has a high market share in Zone 4. The foodstore offer in Waltham Cross is weak, and the number of service operators is below the national average. Based on these facts, and given location proximity, Waltham Cross is the centre most vulnerable to development at Brookfield.
- 4.10 Nevertheless, the mainstream comparison goods clothing and footwear market in Waltham Cross is focused heavily on the value/discount driven retailers and includes Peacocks, Bon Marche, New Look, Shoe Zone, Claire's Accessories, Stead & Simpson and Dorothy Perkins; as well as a small range of local independent retailers including Dizzy Ladies Wear, Rouge Ladies Wear and Butlers Ladies Wear. In this context, it is more than likely that Waltham Cross and Greater Brookfield would perform adjoining complementary functions, enabling Waltham Cross to sustain its function as a more localised shopping centre with a strong mix of convenience and service operators and value driven comparison retailers, and Greater Brookfield offering the higher order, higher value key attractors.
- 4.11 The market, with approximately 50 stalls, operates on a Wednesday and Friday. It is evident from the telephone survey results that 21.6% of visitors to Waltham Cross only visit on a market day. Similar to Hoddesdon, this demonstrates the important role that the market plays in the health of the town centre.
- 4.12 The role of the evening economy in Waltham Cross is more limited than in Hoddesdon, and the centre is used very rarely as a destination for pubs and restaurants.
- 4.13 Based on discussions with the Council and detailed on-site surveys we have identified a possible development opportunity site which could enhance either comparison or convenience goods market share to the benefit of the overall vitality and viability of the town centre (Sturlas Way). By demolishing the shop units fronting onto High Street the site, incorporating the car park and service area, would create a large space for new retail development for a new foodstore operators, a relocation Sainsbury's store or larger comparison retail units to attract multiple retailers. The Sturlas Way Land Ownership Plan is attached in Appendix 4; and the Sturlas Way Site Appraisal is attached in Appendix 5.
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- 4.14 Overall, the importance of clothing and footwear, and other comparison goods categories, are currently equally or perhaps even more important to the health of the centre than foodstore retailing. If proposals for Brookfield do come forward with a greater range and quality of comparison (including clothing/footwear retailers) goods floorspace, Waltham Cross could see some small increase in competition. We believe, however, that the relationship would be entirely complementary and beneficial to the Borough as a whole, with Waltham Cross focusing on value driven and discount comparison goods retailers (similar to the current range of operators) and Greater Brookfield offering the higher order quality retailers underpinned by a very different catchment area.
- 4.15 Given the close proximity, it will be particularly important for the Council to manage perceptions and change during the evolution of Greater Brookfield; ensuring an equal focus on the future of Waltham Cross alongside Greater Brookfield. We believe both are supportable within the catchment area in qualitative terms based on the clearly defined differences in retail operator and scale. In line with national trends, the future focus of Waltham Cross should be underpinned by a convenience and service focus similar to Hoddesdon, whilst Brookfield assumes the role of the major higher order comparison goods shopping destination in the borough.

Table 3.2: Vitality and Viability of Waltham Cross: Key Conclusions

Waltham Cross: Strengths/Opportunities	Waltham Cross: Weaknesses/Threats
<ul style="list-style-type: none"> • Town Centre plays a key role in providing a range of goods and services for the south of the borough; • Good representation of multiple comparison retailers, with a strong clothing and footwear offer – plays a vital role in the town centre; 44% of visitors state that this is main reason for visiting the centre; • Good range of value driven, discount comparison goods retailers (no higher order/high end operators); • Homebase and Wickes occupy two large retail warehouse units which are included within the town centre boundary; • Centre is well maintained and there is evidence of recent investment in the public realm; • Demand for space from 7 retailers including Body Shop, TK Maxx, Costa Coffee and Subway – all strong national multiples; • Street market has c.50 stalls, twice a week. 21.6% of visitors only visit on a market day; • Potential opportunity for further development at Sturlas Way site. 	<ul style="list-style-type: none"> • Number of service operators is marginally below the national average – poor provision in respect of cafes, restaurants, fast food take-aways and public houses; • Convenience goods provision is limited to a small outdated Sainsbury's foodstore in the Pavilions Shopping Centre and a range of smaller independent operators. 27.8% of visitors state this as the main reason for visiting the centre; • Noticeable increase in the number of vacant units in the centre, particularly towards north of High Street – Sturlas Way site: scope for redevelopment; • Limited evening economy, and low usage of pubs, restaurants and evening entertainment (below 5%) from the core catchment – Zone 4.

Cheshunt

- 4.16 A detailed health check of Cheshunt was undertaken in 2008. Cheshunt sits below Hoddesdon and Waltham Cross in the local retail hierarchy, forming the only District Centre in the Borough. In terms of the diversity of uses, the number of units occupied by comparison and convenience operators is below the national average, whilst the number of units occupied by service retailers is significantly above the national average – higher than both Waltham Cross and Hoddesdon. It is clear that the centre performs a very different role to both Waltham Cross and Hoddesdon with no major national multiple comparison goods retailers and a strong service offer catering for the walk-in catchment. There is a high proportion of fast food take-aways. The mid-scale Tesco Metro is supplemented by a small number of independent retailers.
- 4.17 The mix of uses is reflected in the telephone survey results, in which the main reason for visiting the centre is main food shopping (73.3%), personal/luxury goods (11.1%), financial services (11.1%), and personal services (e.g. hair salon, chemist) (6.7%).
- 4.18 Cheshunt is evidently performing primarily a service role in the borough in accordance with its designation as a District Centre, i.e. a lower level than Hoddesdon and Waltham Cross. Cheshunt is performing a vital role as an everyday service and foodstore shopping destination within its tight catchment area. The centre is not used as a comparison goods shopping destination like Waltham Cross and is smaller in scale with fewer convenience and service retailers compared to Hoddesdon at the current time. Unlike Hoddesdon and Waltham Cross, there is no weekly street market.
- 4.19 It is evident from the results of the household telephone survey that the centre is performing a reasonably influential role in terms of the evening economy. When asked where respondents go most often for pubs/clubs, 13.7% of people in Zone 4 cited Cheshunt; with 11.8% using the centre for restaurants, and 3.9% for general other evening entertainment. Both Cheshunt and Waltham Cross are located within Zone 4, and Cheshunt is a considerably more popular leisure/evening entertainment destination.
- 4.20 Overall, Cheshunt is performing the role of a smaller scale local shopping centre, providing for foodstore and service requirements. The centre does not perform the role of a comparison goods shopping destination, aside from small scale everyday essentials, and does not compete with Waltham Cross, Hoddesdon or Brookfield. The Council are encouraged to use the Use Classes Order to control the spread of undesirable uses such as A5 fast food take-aways; without policy control, it was concluded that Cheshunt is vulnerable to change and the loss of essential requirements which underpin the health of the centre and meet the needs of the local catchment.
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Table 3.4: Vitality and Viability of Cheshunt: Key Conclusions

Cheshunt: Strengths/Opportunities	Cheshunt: Weaknesses/Threats
<ul style="list-style-type: none"> • Appears to be performing adequately as a district centre – playing an important role as an everyday service and foodstore shopping destination; • Good service offer catering for the walk-in catchment – high street banks, building societies, estate agents; • Good foodstore role – anchored by a Tesco Metro foodstore, two bakeries and a butcher. 56.9% of respondents stated this as their main reason for visiting the centre; • The analysis demonstrated reasonably good evening economy visitation rates in core Zone 4; • Significantly below average vacancy rates; • Tightly defined catchment area, local 'everyday' shopping role – not competing with higher order clothing and footwear destinations; • High accessibility with good parking provision and national rail station within walking distance; • Potential areas for redevelopment, particularly the 'precinct-style' blocks. 	<ul style="list-style-type: none"> • Weak comparison retail offer – no clothing/footwear offer, unlikely to change in the future; • No identified requirements; • No identified new opportunities for development; • It lies very close to Brookfield but does not compete and plays a complementary role for the local walk-in catchment population; • Parts of the centre are unattractive and traffic-dominated.

Greater Brookfield

- 4.21 A detailed health check of Brookfield was undertaken in 2008. Located on the A10, in close proximity to the M25, the retail destination is approximately 4.5-5miles south of Hoddesdon, just over 2 miles north of Cheshunt, and 3.5 miles north of Waltham Cross (Appendix 1). All destinations are within easy reach of the A10 and ease of access by motor vehicle between the different retail destinations is evident.
- 4.22 The Brookfield centre comprises large modern warehouse units with surface-level parking provision. Primary access to the centre is achieved directly off the A10 Great Cambridge Road leading on to a secondary route along the B156, Halfhide Lane. We are aware from discussions with the Council that there is often a level of congestion at the access junction with the A10 and improvements to the road network would be necessary to support any planned expansion. The centre is served by four bus routes but the significant provision of free parking (amounting to approximately 2,163 spaces) results in the majority of shopping trips being undertaken by vehicle.
- 4.23 The retail centre is divided into two distinct parts (Appendix 6) separated by Halfhide Lane. The Brookfield centre, originally developed in 1983, comprises a 10,270 sq m gross Tesco foodstore and a 7,850 sq m gross Marks & Spencer linked by four smaller units including an estate agent, a healthfood

store, and a Starbucks coffee shop outlet. The Tesco Extra has recently been granted planning permission for an extension (incorporating a mezzanine floor) to the north western corner of the existing store. It is likely that the sales floor area will increase by approximately 935 sq m as a result of the internal alterations permitted by the extension.

- 4.24 The store is open 24 hours and offers a significant range of convenience goods with a deli, bakery, butcher, fishmonger and a hot food counter which are supplemented by the broad range of comparison goods on display. There is also an optician, pharmacy, photoshop and a Krispy Kreme donut counter. As part of on-going improvements to the store, the Tesco Refresh café has recently been re-furbished. The Marks & Spencer store comprises approximately 6,280 sq m net retail floorspace. The store offer includes the retailers clothing and homewares range as well as an electrical goods section and approximately 835 sq m dedicated to the Simply Foods range of convenience goods. There is also an in-store customer café.

Table 3.5: Vitality and Viability of Brookfield: Key Conclusions

Brookfield: Strengths/Opportunities	Brookfield: Weaknesses/Threats
<ul style="list-style-type: none"> • Above average comparison and convenience goods provision – strong representation; • 59.5% visitors stated that clothing, footwear and other fashion goods was their main reason for visiting Brookfield, whilst 44.9% stated that main food shopping was the main reason for their visit; • Range of high street multiple retailers including M&S food/clothing, Next, Argos, Boots and a Tesco Extra convenience/comparison store; • Large format units suitable for modern retailer requirements, but vacancy rate is low and there are a number of high profile national multiple retailers looking for space at Brookfield; • Strongest shopping destination in terms of scale and offer in the Borough and opportunity for expansion. 	<ul style="list-style-type: none"> • Below average service provision – extremely limited ‘everyday’ financial / retail services. Functions as a retail park facility; • Aware of traffic congestion at the main access from the A10 and resultant queues at peak times; • The centre is divided into two distinct parts, and there are poor pedestrian linkages between the Tesco/M&S development and the retail park; • Main shopping destination in the borough, stemming even greater trade leakage from the borough. But, it is a low density, modern retail park type development lacking local service facilities that would reflect a fully functioning town centre as defined in PPS6.

Source: Broxbourne Retail Study 2008

- 4.25 The Brookfield Retail Park, located on the other side of Halfhide Lane, is situated to the north-west of the Tesco/M&S complex comprising a total retail floorspace of 7,280 sq m net. The scheme comprises nine units let to high street fashion retailers Next, Clarks, JD Sports, Outfit, New Look, River Island, Clinton Cards and Thorntons. Halfhide Lane separates the retail park from Brookfield Centre, and inadequate pedestrian linkages and physical barriers results in poor integration between the two retail components.
- 4.26 The Household Telephone Survey asked respondents which centre in the Borough (Brookfield, Waltham Cross, Hoddesdon or Cheshunt) they visited most often. Of those who stated Brookfield (53.7%), 59.5%

of respondents stated their main reason for visiting was for clothing and footwear; 44.9% visit for their main food shopping; 16% visit for top up food shopping; and 7.4% visit for personal/luxury goods. There are no trips in respect of financial or personal services.

Borough Site Opportunities

- 4.27 Within the Greater Brookfield Study (2006) a detailed assessment was undertaken of physical capacity for accommodating additional retail development throughout the Borough centres, looking at sites and existing developments where there may be potential for expansion/increased density. As such, physical capacity for not more than 22,700 sq m gross of retail floorspace was identified in the 2006 study. It should be highlighted here that this floorspace would be split amongst the existing centres and consequently form a series of smaller scale retail developments that would, on their own, have limited impact on trade claw back and market share. They form instead, small-scale and infill development opportunities.
- 4.28 This borough-wide site assessment was reviewed and updated as part of the 2008 Retail Study, including a thorough investigation of potential development site opportunities in and on the edge of the three town/district centres. A possible development opportunity site was identified in Waltham Cross which could enhance either comparison or convenience goods market share to the benefit of the overall vitality and viability of the town centre. The site, known as Sturlas Way, is identified in the 2008 Retail Study, and here in Appendix 4, and covers an area of around 4 hectares. We conclude that aside from this relatively small scale and constrained development opportunity, we have identified no further [major] development opportunity sites within Waltham Cross, Hoddesdon or Cheshunt.
- 4.29 It has been concluded in both the 2006 and 2008 Studies, that given the Borough's existing centres at Hoddesdon and Cheshunt cannot accommodate new retail development, and that Waltham Cross can only accommodate limited retail development, any additional floorspace capacity identified could be accommodated at Brookfield as the Borough's major and dominant retail destination.

Commercial Leisure

- 4.30 Our assessment of the commercial leisure sector within the Broxbourne catchment area indicates that there is a reasonable range of commercial leisure facilities including cinemas, bingo clubs, ten-pin bowling halls, bars, clubs and restaurants and health and fitness clubs. There are, however, evident gaps and deficiencies in the quality of some facilities, particularly within the Borough of Broxbourne. The full Leisure Assessment Supplementary Analysis is attached in Appendix 19.
- 4.31 The recession has brought many challenges for the leisure industry but evidence suggests that leisure spending remains an important part of people's lifestyle choices. The industry continues to evolve in response to the changes and operators are seeking to diversify their product to increase market share, sales and profits.
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- 4.32 Cinema provision within the Borough is limited to a small facility within the Civic Hall run by the Council, and although an important local venue, it does not appeal to many sectors of the population who want to see the latest blockbuster hits at modern multiplexes. Currently, residents have to travel to outside of the Borough to Enfield and Harlow to their nearest multiplex. Although the cinema industry is not immune to the recession and recent evidence suggests that the opening of new screens has slowed down, for many people, especially families, a night at the cinema is considered to represent relatively good value. Recent research suggests that cinema's are currently experiencing a boom in admissions.
- 4.33 We have carried out a quantitative assessment to look at the future need for cinema provision in Broxbourne. This highlights capacity for an additional 15 cinema screens within the Broxbourne catchment area up to 2013, rising to 21 screens in 2026. We therefore consider that a small to medium sized multiplex cinema could be supported within the Borough on the basis that there are currently no commitments for new cinemas in the Borough or the wider sub-region. A new cinema in the Borough would also serve a qualitative gap in the market when reviewing 5 and 10 minute drive time distances.
- 4.34 In terms of the bingo industry, it is evident that there has been a fall in revenues as a result of the smoking ban and the rise in online gambling. We predict that the market will continue to struggle as the market recovers from the downturn, and although there would appear to be a gap in the current provision of bingo halls within the Borough, it is our view that future provision will be dependent on market demand. We conclude that there is a 'gap' in provision and planning for such a facility might stimulate demand, although policy should remain flexible in respect of this particular facility.
- 4.35 The ten pin bowling industry appears to be performing marginally better, and like cinemas, it remains a strong family activity. There are currently no ten-pin bowling facilities in the Borough, with the closest venues being in Harlow, Lakeside, Bishops Stortford and Stevenage. There are also no facilities in Welwyn Garden City, Hatfield, Potters Bar or Enfield and on this basis we consider that there could be the potential to support a new ten-pin bowling alley in the Borough, subject to market demand.
- 4.36 There is a good provision of local authority operated leisure facilities throughout the borough providing a range of health and fitness activities, although no private operators despite a growth and boom in the industry in recent years. A number of new, lower cost gym models are being introduced to the UK from America and Holland.
- 4.37 Notably, 'The Gym' has recently opened its first location in the Blenheim Centre, Hounslow – a £220m mixed-use development comprising of retail, leisure, private and affordable key-worker housing and additional community facilities. We understand that membership inductions have been strong, with people taking advantage of good quality facilities which are open 24 hours a day, seven days a week following the lead of similar business models that have been launched with great success in the US and continental Europe. Investors have stated that they will establish other gyms in other underinvested areas where local communities with low incomes will be able to use the facilities. Sportcity / Fit4Free Group are from Holland and looking to introduce a similar budget membership concept to the UK preferably, we understand, inside Shopping Centres.
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- 4.38 Market demand generally identifies the gaps and opportunities within catchment areas, and we conclude that Broxbourne would be able to support the representation from a private health club/gym facility if the opportunity presented itself. This could be in the form of either higher end or more budget operators – both of which appear popular within the catchments in which they operate and both of which would identify the appropriateness of a catchment area. Again, planning for such a facility would likely stimulate demand.
- 4.39 The final part of our analysis considers sequentially preferable sites for leisure floorspace within the Borough's main town centres. Drawing on information from the Borough wide retail study, it is apparent that there is a shortage of suitable and available sites for both retail and leisure development in Cheshunt, Hoddesdon and Waltham Cross town centres. We have only identified one site in Waltham Cross – Sturlas Way – which is unlikely to be suitable for leisure operators given the constrained nature and scale of the site and lack of opportunities for car parking facilities.

Summary

- Overall, the importance of food retailing, the market and service operators are crucial to the vitality and viability of Hoddesdon town centre. Consistent with the GVA 2005 study, we conclude that Hoddesdon is not performing as a comparison shopping destination. Based on retail trends, and limited development opportunities in the centre, this is unlikely to change significantly in the future, although the Tower Centre may go some way to consolidating market share, although is not of a scale to create a step change in retail offer. We consider that the retail function of Hoddesdon is likely to consolidate, and looking ahead the main focus of the centre will be for convenience shopping, local services and eating/drinking - continued investment in the quality of the environment will be crucial.
- In Waltham Cross, the clothing and footwear comparison category is important to the centres performance at the current time, although it is evident that current composition is focused on the value and discount end of the market, with an absence of higher end operators. A relatively strong proportion (27.8%) of visitors state main food shopping as the main reason for visiting Waltham Cross; and whilst the foodstore offer is poor in qualitative terms, the shopper usage and demand is evident. The evening economy is particularly weak, and the centre is used rarely as a destination for pubs and restaurants. The Sturlas Way development site is a good strategic location to enhance the town centre offer. Given the intended role of Greater Brookfield, offering a range of higher end, key attractors, and its future role alongside Waltham Cross would likely be complementary but must be managed by the LPA.
- Overall, Cheshunt is performing the role of a smaller scale local shopping centre, providing for foodstore and service requirements. The centre does not perform the role of a comparison goods shopping destination, aside from small scale everyday essentials, and does not compete with Waltham Cross, Hoddesdon or Brookfield. The Council are encouraged to use the Use Classes Order to control the spread of undesirable uses such as A5 fast food take-aways; without policy

control, it was concluded that Cheshunt is vulnerable to change and the loss of essential requirements which underpin the health of the centre and meet the needs of the local catchment.

- Brookfield is recognised as the strongest comparison and convenience goods shopping destination in the Borough. There are few 'other' town centre uses such as local service facilities and eating/drinking destinations and the destination is focused on retail uses at the current time. In respect of leisure, we have identified gaps and potential need for cinema, bingo, tenpin bowling and private gyms within the Borough which would meet identified qualitative gaps in provision. The assessment of physical site opportunities has identified no major redevelopment sites in or on the edge of Hoddesdon or Waltham Cross; Hoddesdon has recently benefited from the redevelopment of the Tower Centre and is constrained by Conservation Area status and both centres are physically limited by surrounding land uses and roads.

5. ECONOMIC CAPACITY PROJECTIONS

5.1 This section summarises the performance of existing comparison goods floorspace in the Borough in terms of trade retention and general attraction relative to the wider sub-region, and sets out up-to-date capacity forecasts based on the Household Telephone Interview covering 1,200 households (April, 2008).

5.2 In this section we estimate the current performance of the four main centres in the Borough, including Hoddesdon, Waltham Cross, Cheshunt and Brookfield, as the basis for forecasting the need for further retail floorspace to the period 2026, incorporating interim years of 2013, 2018 and 2023. We used a conventional and widely accepted step by step methodology which draws upon the results of the Household Telephone Survey of existing shopping patterns to model the existing flows of available expenditure to each retail destination. To develop the baseline position, we have:-

- Calculated the total amount of comparison goods expenditure which is available within the postcode areas comprising the Broxbourne survey area;
- Allocated the available expenditure to the comparison goods shopping destinations, on the basis of the Household Survey of shopping patterns, so as to provide estimates on current sales and forecasts of future sales;
- Compared the total expenditure attracted to each shopping destination with current retail floorspace to assess sales densities in each shopping destination;
- Building on the baseline position, we have explored the capacity for further comparison retail floorspace, having regard to the performance of existing centres.

Capacity Forecasts

Base

5.3 We revisited the base case need assessment produced as part of the Broxbourne Borough Council Retail Study (GVA Grimley, October 2008). The quantitative assessment and findings are attached in Appendix 7. We have adopted the same methodology and evidence base in respect of the Household Survey Results, but updated other key variables where relevant. These include population forecasts and spend per capita figures (2007 Price Base) by Zone, both of which are published by Experian Business Strategies and reflect the most up-to-date socio-economic position in the survey area.

- 5.4 The Base Case scenario has retained the 3.8% expenditure growth rate as used in the 2008 Retail Study to represent the 'Base' position. We consider this reflects an appropriate mid-range position from the highly conservative figures emerging as a consequence of the recession, and those more optimistic ultra-long term growth rates, both of which are published by Experian Business Strategies.
- 5.5 We have revised figures to account for Special Forms of Trading (SFT) to reflect the latest Experian estimates, and the projections allow growth in sales efficiency of 1.5% over the period (2008-2026). The needs assessment concludes that based on current market share, the Borough would generate a global need (i.e. derived from the town centres and out-of-centre retail floorspace) for 13,326 sq m net (20,869 sq m gross) by 2018, growing substantially to 23,048 sq m net by 2023.

Sensitivity Testing – Growth Rates

- 5.6 In the light of the recent downturn in the economy questions are raised about the realism of the growth rates employed. When making strategic planning decisions over the long term it is appropriate to have regard to long term trends as well as short term forecasts (Appendix 8 and 9). The 3.8% figure used in our 'base case' is below the ultra long term trend and we consider it remains an appropriate figure for strategic long term planning. Experian (2009) identify an average annual growth of 4.7% over the period 1968-2008 based on an extrapolation of past trends which takes account of economic cycles of growth.
- 5.7 This is significantly higher than their current short term forecasts which suggest very little growth (1.5% per annum) between 2008-2013, increase to 2.8% between 2013-2018. We adopt these figures within the 'cautious' capacity scenario.
- 5.8 We have tested the sensitivity of our capacity projections in both scenarios. In Appendix 8, we have adopted the 4.7% ultra long term trend figure, and made a correspondingly higher adjustment (2%) for growth in sales efficiency. This generates a need for 15,763 sq m net in the Borough by 2018, growing to 27,440 sq m net by 2023. Adopting a more cautious scenario (Appendix 9) generates a need for 8,404 sq m net, growing to 18,399 sq m net by 2023.

Market Share

- 5.9 It should be emphasised that these capacity forecasts are based on current market share, i.e. shopping patterns remaining un-changed over the forecast period to 2023. This assumes, therefore, that the Broxbourne centres will continue to capture only 35.9% of the comparison goods market share within Zones 1-4 (those Zones broadly defining the Borough boundary), demonstrating a significant level of leakage from the Borough. In reality, there is clearly the opportunity to enhance market share, and to claw back trade to support a greater level of retail floorspace than that identified in the capacity forecasts discussed above.

Global Capacity Projections

- 5.10 Given the conservative nature of capacity forecasts in the Borough based on current market share, it is important to understand wider global capacity across the Sub-Region. This is a useful and important measure to understand the amount of money in the system and the scope for claw-back as well as the ability of identified levels of expenditure growth to support existing and pipeline floorspace throughout the Sub-Region as identified in Section 3. Our assessment of the global need for further comparison floorspace within the sub-region is attached in Tables 1A-1C in Appendix 10.
- 5.11 In our base scenario (Table 1A, Appendix 10), based on their turnover derived from the survey area and 'inflow' from beyond this area, the identified centres and 'other' destinations (e.g. local centres, foodstores, retail parks etc) in total generate a 'surplus' expenditure of £2,498m by 2018. There is a significant need for additional floorspace in the sub-region to absorb such growth in expenditure demonstrating the ability of Greater Brookfield (c.£175m) to accommodate only a small proportion of this spend (7%) alongside the centres of Enfield, Harlow and Welwyn Garden City, for example. The allocation of the remaining growth, post Greater Brookfield (£2,323m) depends entirely on the ability of each centre to proactively increase their respective market shares through new planned development.
- 5.12 Tables 1B and 1C in Appendix 10 consider the 'trend line' and 'cautious' growth scenarios, which show 'global' capacity ranging from £910m-£3,511m by 2018. While these relate to a wide range of defined centres and 'other' destinations, significant capacity arises in the defined neighbouring centres in both scenarios. There is certainly sufficient expenditure, even by 2018, to support proposed scheme in Enfield, Harlow, Stevenage, and Welwyn Garden City, for example. This demonstrates that further development at Greater Brookfield is needed over and above identified commitments/proposals in neighbouring centres, to accommodate the global comparison shopping needs within the sub region. Failure to secure new development at Greater Brookfield in line with its current role and market share would result in a wider disparity between identified needs and the capacity of existing centres within the sub-region.
- 5.13 It is also evident that while centres like Enfield, Harlow and Welwyn have identified opportunities for new comparison shopping development, a number of the other smaller centres in the sub-region which generate future capacity, do not have current opportunities identified for further major comparison shopping floorspace. In practice, therefore, the very significant global comparison capacity identified by our analysis will be available to support the relatively limited key development opportunities principally focused in the strategic town centres.
- 5.14 We do not consider the effect of imposing a 'cap' (i.e. 50,000 sq m gross) on new development at Greater Brookfield will be likely to materially increase the scale or quality of new development likely to be supportable in neighbouring centres. The scale of the capacity identified within the wider Broxbourne catchment suggests that there is more than sufficient scope to support the current aspirations of the existing major strategic town centres, and to accommodate new development at Greater Brookfield.
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Therefore there is no reason to expect retailers or investors to be significantly influenced by new proposals at Greater Brookfield when considering the scope for the other major sub-regional centres.

- 5.15 Our analysis suggests that nearby higher order sub-regional town centres are likely to have more than sufficient potential within their own catchment to secure their current aspirations in parallel with the evolution of Greater Brookfield.

Summary

- In light of the economic downturn, we have updated our original 2008 Retail Study outputs and tested both optimistic and conservative capacity forecasts. The identified levels of supportable capacity range from 8,404 sq m net by 2018 (growing to 18,399 sq m net by 2023) in the most conservative scenario, to 15,763 sq m net (growing to 27,440 sq m net) in the most optimistic. These figures assume no change in shopping patterns and a continued significant leakage of trade (c.64%) to alternative and competing shopping destinations, resulting in unsustainable travel patterns and carbon emissions, as well as an outflow of investment, jobs and general prosperity not being captured in the Borough.
- Capacity forecasts set out above are highly conservative and demonstrate the significant leakage of trade from the Borough. In reality, there is a clear opportunity to enhance market share, and to claw back trade to support a greater level of retail floorspace than that identified in the 'current market share' capacity forecasts.
- Our assessment of Global Capacity in the Sub-Region (i.e. the growth in expenditure above that required to support the improved business efficiency of existing floorspace), has identified surplus expenditure of £2.5 billion by 2018. The Greater Brookfield proposals (50,000 sq m gross) will absorb only c.£175m (7%) of this identified surplus, ensuring more than sufficient residual expenditure (c.£2.3b) to support all pipeline schemes throughout the Sub-Region. We conclude that there is more than sufficient capacity in the Sub-Region to support the improved business efficiency of existing retail floorspace, the Greater Brookfield proposals, and all pipeline schemes in competing town centres.

6. TOWN CENTRE CONCLUSIONS

- 6.1 PPS4 is driven by the objective to encourage sustainable economic growth, with the overall thrust to sustain and enhance the vitality and viability of town centres. Local authorities are urged to set out a strategy for the management and growth of centres; identifying means to accommodate identified need for growth and deficiencies in the network of centres, and reducing the need to travel. The RSS firmly puts the onus on the local authority to plan for the network of centres in Broxbourne given their small scale, and also refers them to determine the future role of Greater Brookfield in the Borough hierarchy. The RSS is soon to be abolished, as confirmed by the new coalition government, and this planning/policy position for the Broxbourne Borough Council will remain unchanged; i.e. decision making powers resting with Local Planning Authorities.
- 6.2 Focusing on the wider Sub-Region, the influence of the major comparison shopping destinations is evident, with the Borough centres of Waltham Cross, Hoddesdon, Cheshunt and Brookfield only able to capture 36% of comparison goods trade generated within the Borough. The major competing centres to Broxbourne capture a significant amount of trade from the Borough and are all implementing, or have recently implemented, major town centre enhancements which will ensure a stronger positioning in the Sub-Region moving forwards. The level of competition and threat of continued polarisation of retail activity to Broxbourne's larger competitors will result in significant challenges for the Borough without corresponding improvements to its own facilities.
- 6.3 The retail capacity studies underpinning each authorities respective evidence base documents have also identified significant growth in expenditure, with identified site opportunities not sufficient to meet the full extent of capacity projected in the Sub-Regional system. The assessment indicates that first, competing centres are all enhancing and diversifying their town centre offers which will lead to an increased leakage of trade from Broxbourne; and second, there is a substantial amount of forecast expenditure growth in the catchment area that cannot be entirely accommodated within these competing centres. Site identification does not equate to the full physical capacity required to meet the forecast growth in expenditure. Securing retail development in Broxbourne is critical to safeguarding its future and to help ensure more sustainable shopping patterns.
- 6.4 Our quantitative capacity projections for additional comparison goods floorspace are based on constant market share, i.e. assuming shopping patterns do not change. The projections identified are constrained by the currently low market share and a continued significant leakage of trade (64%) to alternative and competing shopping destinations, resulting in unsustainable travel patterns and carbon emissions, as well as an outflow of investment, jobs and general prosperity not being captured in the Borough. Provided a scheme of sufficient critical mass came forwards in the Borough, there will be sufficient claw-back of spend to support more than the baseline forecast of 15,763 sq m net by 2018.
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- 6.5 Indeed, our quantitative global Sub-Regional forecasts identify that even allowing for existing floorspace to improve their sales efficiency, there will be 'surplus expenditure' to support a significant additional amount of comparison goods floorspace throughout the wider Sub-Region. Nearby higher order centres, such as Enfield, Harlow and Welwyn Garden City, will have more than sufficient potential within their own catchment to secure their current aspirations – as identified in Section 3 – in parallel with retail growth in Broxbourne.
- 6.6 The detailed health check analysis of the centres of Hoddesdon, Waltham Cross and Cheshunt conclude them to all be performing well in line with their intended roles. Looking ahead, and given the physical constraints and built environment, the main focus of Hoddesdon will be for convenience shopping, local services and eating/drinking. Waltham Cross has a stronger comparison – albeit it more value/lower market – offer, which it should aim to retain, but it will be crucial to focus on strengthening the convenience goods, service and eating/drinking offer to ensure the diversity and therefore attraction required in a town centre. The Sturlas Way site is identified as an appropriate development opportunity to help achieve these goals.
- 6.7 Cheshunt is a small local shopping centre and does not compete with Hoddesdon, Waltham Cross or Brookfield. The Council should aim to retain the mix of useful 'everyday' facilities, and protect against a concentration of undesirable A5 fast food take-aways, for example. Cheshunt is vulnerable to a weak policy framework, rather than competing schemes elsewhere in the Borough. Greater Brookfield is the strongest convenience and comparison goods shopping destination in the Borough, and is an established part of the retail network in the Borough having been originally developed in 1983. In respect of leisure, we have identified gaps and potential need for cinema, bingo, tenpin bowling and private gyms within the Borough which would meet identified qualitative gaps in provision.
- 6.8 The assessment of physical site opportunities has identified no major redevelopment sites in or on the edge of Hoddesdon or Waltham Cross. Hoddesdon has recently benefited from the redevelopment of the Tower Centre and is constrained by Conservation Area status, and both centres are physically limited by surrounding land uses and roads. The constrained Sturlas Way development opportunity represents the most strategic development site, and whilst it could contribute significantly to enhancing the vitality and viability of Waltham Cross it is not able to provide the critical mass necessary to compete effectively with the higher order centres and claw-back lost trade. A number of smaller infill developments in each centre are likely to become apparent over time but would, on their own, have limited impact on trade claw back and increasing the Borough's overall market share.
- 6.9 The Government clearly aims to focus new economic growth and development of main town centre uses in existing centres and to remedy deficiencies in provision in areas with poor access to facilities. Competition between retailers and enhanced consumer choice is key to achieving the Government's overarching objectives of sustainable economic growth. Both PPS6 and PPS4 state that deficiencies should be addressed and consideration given to the scope for expansion, consolidation or the designation of new centres. In accordance with these policy objectives, it has consistently been
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concluded that any new retail development in the Borough needs to be of a sufficient scale and critical mass to reduce the loss of trade to other centres in the Sub-Region, and consequently meet the need of the local catchment and increase the currently low market share.

- 6.10 It is entirely appropriate to consider the potential of Greater Brookfield – a long established retail destination – to contribute to meeting the clearly defined need given the inability of the other town centres to physically accommodate the required critical mass. As we have already stated, Brookfield is by far the most significant convenience and comparison shopping destination within Broxbourne; the Tesco/M&S Retail Park collectively provides a comparable offer to a major town centre serving the Broxbourne area, and has a well established role within the wider retail hierarchy. It is apparent that the Brookfield Centre will continue to be the Borough's dominant, higher order comparison retail destination.
- 6.11 It would not be appropriate to consider the provision of an entirely new centre, in addition to existing facilities at Greater Brookfield given policy objectives to consolidate and reduce the need to travel. Such an option would unlikely be attractive to retailers/operators on the basis that it fails to build on the established attraction of Greater Brookfield with its key anchor stores. The existing composition provides a strong commercial platform and catalyst for change. A minimum scale of 50,000 sq m gross (35,000 sq m net) has been historically identified, and tested, to ensure a commercially viable scheme, which might include the redevelopment of Tesco/Marks & Spencer and a range of new high street names such as Next, H&M, Gap, Zara, Mango etc., together with a choice of commercial leisure and eating/drinking facilities.
- 6.12 We have concluded that the most effective way to ensure that the proposals for Greater Brookfield are complementary to the future role of the existing Broxbourne Centres, besides restricting the scale of additional convenience floorspace permitted, is by supporting a development of sufficient critical mass to attract the necessary anchor stores and the type of quality High Street operators not currently represented in the area. In addition to minimising the impact on the existing Broxbourne centres, the provision of a new level of quality comparison retail and leisure operators at Greater Brookfield also maximises the prospects of retaining a higher level of expenditure within the Broxbourne Borough and catchment area.
- 6.13 The following sections focus on the 'impact' of such a strategic allocation (Appendix 11) in the Core Strategy, both on the Borough and the wider Sub-Region.

7. IMPACT

- 7.1 Earlier sections have concluded that a comparison led retail scheme at Greater Brookfield comprising 35,000 sq m net/50,000 sq m gross would ensure the required critical mass for a commercially viable scheme and the subsequent claw-back of comparison goods expenditure. Furthermore, this scale and mix of scheme type will be complementary to the other Borough centres and will instead claw back lost expenditure to the wider Sub-Region.
- 7.2 The Core Strategy states that proposals for Greater Brookfield would provide a sustainable centre with residential, retail, leisure, business and community uses, whilst addressing transport infrastructure constraints, improving public transport and providing integrated pedestrian and cycle routes. Proposals for development to the north of the Brookfield Farm will provide approximately 600 dwellings and a new Borough retail centre to reduce the significant amount of retail leakage to centres outside of the Borough.
- 7.3 This section considers this 'impact' in more detail. First, we have assessed quantitative impact within the base (expenditure growth) scenario, and second, we have tested the impact of strategic growth at Greater Brookfield within the more conservative and optimistic expenditure growth scenarios.

Base

- 7.4 We have undertaken an analysis of the likely effects of an additional 50,000 sq m gross (35,000 sq m net) of comparison goods, high street type sales floorspace on the existing network of retail provision in the wider sub-region. This adopts a 2018 'design year' to allow for new development to reach an established trading pattern. Our base assessment assumes a scheme at Greater Brookfield comprising 35,000 sq m net will achieve a sales density of £5,000 per sq m at 2018 equating to a total turnover of £175m. This exercise is reproduced at Appendix 12.
- 7.5 The approach we have taken to impact is a conventional one, in line with normal practice for planning assessments. This considers the likely trade draw pattern of the proposals across the 12 survey zones, and trade draw from beyond this area. The assessment considers how much trade the proposals will draw from each zone, and within each zone which centres are likely to be impacted upon. We should highlight that the analysis specifically identifies 14 centres; and other centres and retail destinations are separately identified as 'other' so all of the available expenditure within the study area is accounted for. It should be noted that the turnover of the proposed scheme is taken largely from the identified centres in the impact modelling given the comparables in respect of quality and mix of retail offer, but also a small proportion from 'other' destinations.

- 7.6 The conclusions from this analysis are summarised in Table 11, Appendix 12. This shows the turnover of each destination in 2018 in the absence of new development at Greater Brookfield, and then in 2018 in the scenario that the Greater Brookfield scheme is implemented. This exercise does not take into account the potential for other new planned developments to come forward in other centres, such as the aspirations for Enfield, Welwyn or Harlow, which will inevitably reinforce the market share of these centres and offset the impact of new development at Greater Brookfield. In this context therefore, our assessments and scenarios are representative of worst case impact levels.
- 7.7 The Assessment expresses the impact on existing centres in terms of the percentage difference between the forecast turnover with the new development, and the turnover each centre would be expected to have achieved by 2018 with no new development. However, to put these 'impacts' into context it is also relevant to consider the forecast turnover of each centre at the design year compared to its current performance. Dealing with the Borough centres and those centres in the wider Sub-Region which are closest to the Borough, we highlight the negligible impact that growth at Greater Brookfield will have:-
- In the case of Waltham Cross, we estimate the current comparison turnover of the centre at £66m would increase by 2018 to £94.8m. With the impact of Greater Brookfield estimated at 5.9%, we estimate the centre's turnover would reach £89.2m by 2018, i.e. a growth of £23.2m.
 - In the case of Hoddesdon, we estimate the current comparison turnover of the centre at £17.1m would increase by 2018 to £25m. With the impact of Greater Brookfield estimated at 2.9%, we estimate the centre's turnover would reach £24.3m by 2018, i.e. a growth of £7.1m.
 - In the case of Enfield, we estimate the turnover of the centre at circa £211.5m in 2009. Taking account of forecast growth in our base scenario Enfield's turnover would be expected to increase to £305.8m by 2018 (not accounting for any new planned development – the Station area for example – which would be expected to increase its market share and consequent turnover). We anticipate that impact of Greater Brookfield would reduce Enfield's turnover to £284m, or a 7% impact, still leaving an increase in the centres turnover of £71.5m.
 - In the case of Harlow, we estimate the current comparison turnover of the centre at £343.4m would increase by 2018 to £500.3m. With the impact of Greater Brookfield estimated at 7%, we estimate Harlow's turnover would reach £465.2m by 2018, i.e. a growth of £121.8m.
 - In the case of Welwyn Garden City, we estimate the current turnover of the centre at £188.4m which is forecast to increase to £274.3m by 2018. Given it's distance, we envisage a lesser impact as a consequence of Greater Brookfield, equating to an impact of only 5.2%, which still represents an increase in Welwyn's turnover of £71.6m. This takes no account of the potential to increase Welwyn's market share within its own catchment based on the major aspirations identified.
- 7.8 In our base case we do not consider the scale of floorspace proposed by the 'scheme' at Greater Brookfield will have a significant adverse impact on any nearby centre. The scale of surplus capacity
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within the sub region is demonstrated by the scope for significant growth in the turnover of neighbouring centres in real terms. In practice, where new developments are planned, particularly in Enfield, Harlow and Welwyn, the scale of global capacity indicates there is more than sufficient expenditure to support new developments in the centres. The respective Borough's own retail assessments are consistent in this conclusion in respect of significant forecast growth.

Impact Sensitivity Testing

Growth Rates

- 7.9 We have tested the sensitivity of the analysis to different economic conditions and different turnover assumptions. In Appendix 13, we have tested the impact of a 35,000 sq m net (50,000 sq m gross) scheme assuming the 'low growth' scenario described earlier. This still demonstrates that by the design year (2018), the effects of the development would be more than offset by growth.
- 7.10 This suggests that our conclusions on impact are not particularly sensitive to the current short term impact of lower growth in consumer spending. It could also be argued that in the light of current limited growth, on a like for like basis it would also be appropriate to reconsider the likely turnover of Greater Brookfield. Nevertheless, we have not undertaken this exercise to demonstrate a 'worst case' scenario.
- 7.11 We have not separately tested the level of growth which would be achieved adopting the 'trend line' 4.7% growth assumption, but clearly the scale of growth would be significantly higher in this scenario. The low growth scenario, set out in Appendix 13, has already demonstrated that the effects of development would be more than offset by growth, and therefore a high growth scenario based on ultra long term trends would only conclude an even more positive outcome.

Turnover Assumptions

- 7.12 We have also tested the impact of Greater Brookfield assuming it achieves higher turnover levels than those used in our baseline assessment. Appendix 14 sets out our sensitivity testing adopting our cautious growth assumptions, and using the higher sales per sq m figure (£5,500) for Greater Brookfield.
- 7.13 Even adopting this scenario, the conclusions reached in respect of the impact of Greater Brookfield on neighbouring centres remain unchanged. The effect of higher turnovers and lower spending growth marginally reduces the scale of growth in the turnover of the centres affected over the period 2008-2018, and the indicated levels of impact are marginally higher. However, in each case neighbouring centres would be expected to experience significant growth in real terms, and in the context of the wider capacity arising within the sub region, there is still more than sufficient expenditure capacity available to support existing centres and planned new developments.

- 7.14 To illustrate this, Appendix 15 identifies the current and forecast turnover of each centre in 2018 after taking into account the cautious growth projections and 'worst case' turnover assumptions, and identifies the level of 'surplus' growth in each centres' turnover over and above 1.5% conventionally allowed to support existing retailers sales efficiency. Every centre examined shows surplus growth over and above this level.

Greater Brookfield Catchment Area

- 7.15 Following the implementation of an additional 35,000 sq m net of comparison goods floorspace at Greater Brookfield, the market share of the shopping destination will increase, consolidating the catchment area. Plan 2 and 3 illustrate both Greater Brookfield's existing and future catchment area following strategic retail growth. It is evident that the shopping centre will enhance market share predominantly in Zones 2, 3 and 4, consolidating its current catchment area, rather than expanding significantly into other town centre core catchment areas.
- 7.16 We have reviewed the implications of growth at Greater Brookfield on market share, as first considered in Table 3.3, Section 3 above. We review the uplift in market share pre and post Greater Brookfield within Core Zones 1-4 (largely reflective of the Borough boundary), the outer Zones 5-12, and the Study Area as a whole (Zones 1-12). The findings are set out below in Tables 7.1-7.3.
- 7.17 It is apparent from Table 7.1 that the trade retention of Brookfield, Waltham Cross, Hoddesdon and Cheshunt has increased from 35.9% to 57.6% in Zones 1-4 by 2018 following development at Brookfield. These are the Zones largely reflective of the Borough boundary and the findings demonstrate how the proposals would result in more sustainable travel patterns by introducing facilities to meet local needs.

Table 7.1: Market Shares in 2018 With and Without Brookfield Proposals
CORE ZONES 1-4

	2018 <u>Without</u> Brookfield Proposals	2018 <u>With</u> Brookfield Proposals
Brookfield	17.0	39.8
Cheshunt / Hoddesdon / Waltham Cross	18.9	17.8
Total Broxbourne Centres	35.9	57.6

- 7.18 Within Zones 5-12, the outer catchment, the influence of Greater Brookfield is less, leading to increase in market share from 4.7% to 11.1%; whilst the market share of the three town centres in the Borough will remain largely unchanged. The combined market share of the four Broxbourne centres will increase from 9.9% to 16.2%.

Table 7.2: Market Shares in 2018 With and Without Brookfield Proposals**OUTER ZONES 5-12**

	2018 Without Brookfield Proposals	2018 With Brookfield Proposals
Brookfield	4.7	11.1
Cheshunt / Hoddesdon / Waltham Cross	5.2	5.1
Total Broxbourne Centres	9.9	16.2

- 7.19 Within the full extent of the survey area, the market share of Brookfield, Cheshunt, Hoddesdon and Waltham Cross is likely to increase to c.28.5%.

Table 7.3: Market Shares in 2018 With and Without Brookfield Proposals**TOTAL ZONES 1-12**

	2018 Without Brookfield Proposals	2018 With Brookfield Proposals
Brookfield	8.3	19.6
Cheshunt / Hoddesdon / Waltham Cross	9.3	8.9
Total Broxbourne Centres	17.6	28.5

- 7.20 This section has demonstrated that retail development at Brookfield would have the effect of clawing back lost comparison goods expenditure from the Borough, thereby generating more sustainable shopping patterns and meeting a clearly identified local need. At present, the Broxbourne centres retain only 35.9% of available expenditure within the core catchment, whilst the remainder of Borough generated expenditure leaks to competing shopping destinations. Our assessment has demonstrated the positive impact of Greater Brookfield, enabling the Borough to increase its comparison goods market share/trade retention from only 35.9% to 57.6%.

Summary

- We have adopted a 2018 design year in respect of the Greater Brookfield proposals, and identified a total turnover of approximately £175 million based on a scheme comprising 35,000 sq m net comparison. We have tested the impact of this level of turnover on the network of centres in the wider Sub Region within a 'Base', 'Low Growth' and 'Sales Density' scenario, and in each case the scheme will not have a significant detrimental impact in any case.

- This is consistent with our conclusions in respect of the significant global capacity arising in the Sub Region over the LDF period. It should also be noted that the methodology did not take into account the potential for other new planned developments to come forward in other centres, such as the aspirations for Enfield, Welwyn or Harlow, which will inevitably reinforce the market share of these centres and offset the impact of new development at Greater Brookfield. In this context, our assessment is representative of worst case impact levels, which in themselves are not significant.

8. RETAIL GROWTH

- 8.1 This assessment has highlighted the appropriateness of strategic retail growth at Greater Brookfield, the significant surplus expenditure to support identified development aspirations across the Sub Region, and the negligible impact the Brookfield proposals will have on the network of centres in the Borough and beyond. This section reviews in more detail the implications of Greater Brookfield in qualitative terms focusing on the Broxbourne centre's of Waltham Cross and Hoddesdon. In particular, we set out where we believe the future strengths of these centres to lie if Brookfield does come forward to ensure a complementary and sustainable network of centres.

Waltham Cross

- 8.2 Waltham Cross is located approximately 3.5 miles to the north of Brookfield and the potential retail expansion area. Our quantitative analysis indicates that retail growth at Brookfield in the region of 50,000 sq m gross would have an impact of 5.9% (£5.6m) on Waltham Cross town centre based on the current mix of uses and function of the centre at the current time. We consider this to be a reasonably acceptable level of impact, particularly given the ability of the centre to achieve more than sustained sales efficiency growth up to the period 2018. The higher level of impact on Waltham Cross compared to Hoddesdon is the result of our assessment in respect of proximity and the greater focus on clothing / footwear retailing in Waltham Cross at the current time.
- 8.3 Moving forwards, it is clear that retail growth at Broxbourne is the only development option in the borough which has the ability to claw back significant comparison goods trade lost to higher order competing sub-regional centres. As previously identified, the provision of a new level of quality comparison retail and leisure operators at Greater Brookfield also maximises the prospects of retaining a higher level of expenditure within the Broxbourne catchment area.
- 8.4 In the context of national policy/sustainability, the Council can promote major retail growth at Brookfield, whilst managing and promoting change in Waltham Cross and protecting its vitality and viability as a more local shopping destination with a localised catchment area. We recommend that Council should, however, be proactive in respect of a strategy for Waltham Cross to identify its future role, underpinned by implementation measures in advance of Brookfield coming forwards. A proactive approach will have a greater chance of success, rather than focusing on Brookfield and only then implementing a strategy to enhance the centre.
- 8.5 Whilst we consider a 50,000 sq m gross scheme would be acceptable and complementary to what's already on offer in the Borough, the Council should not be complacent in respect of the existing network of centres. There will clearly be change in the Borough which will require an overall strategy. Nevertheless, the proposals for Greater Brookfield are complementary to the future role of the existing
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- Broxbourne Centres, comprising sufficient critical mass to attract the necessary anchor stores and the type of higher order quality High Street operators not currently represented in the area.
- 8.6 Our assessment demonstrated that the clothing and footwear mix in Waltham Cross is comprised of retailers from the mid-low end of the market, and we understand that Brookfield will comprise a greater number of mid-higher end high street retailers such as Next, H&M, Gap, Zara, Mango etc. Already, therefore, there is an element of complementarity, but Waltham Cross may experience some trade diversion in the absence of alternative reasons to visit the centre which are either not available at Brookfield, or which provide a more accessible choice for the local catchment population.
- 8.7 We have identified a weak convenience goods offer in qualitative terms, although a reasonably strong proportion of visitors (27.8%) state main food shopping as the main reason for visiting the centre. This is despite the major foodstore offer in the form of Tesco at Brookfield, located only 3.5miles to the north. The local catchment around Waltham Cross are clearly choosing more convenient and linked trip local foodstore shopping facilities in the town centre, rather than travelling to Brookfield which is of a much larger scale, despite the qualitative deficiencies identified.
- 8.8 Convenience goods provision is a crucial element to any town centre serving a local catchment area, and we have identified this as a weakness in Waltham Cross which could certainly be enhanced to strengthen its complementary role alongside Brookfield, even following major retail growth. The 2008 Broxbourne Retail Study identified a key development opportunity site in Waltham Cross with potential to enhance either the comparison or convenience goods market share to the benefit of the overall vitality and viability of the town centre. The development options will clearly depend on commercial demand and viability, although our initial assessment identifies the site as a possible central location for a new quality foodstore in the town centre.
- 8.9 The site is bound by Wickes, the High Street and Sturlas Way (See Appendix 4 and 5) and Park Lane and presently comprises 14 retail units fronting onto High Street. A car park and service area is situated to the rear of the retail units and occupies the remainder of the site. We have established that the extent of the site is subject to three different land ownerships as demonstrated in Appendix 5, and our detailed site appraisal is attached in Appendix 5. Evidently, development will depend on commercial demand/viability and suitable traffic, parking and access arrangements, but strategically this would seem an ideal location to enhance the town centre retail offer.
- 8.10 Demolition of the shop units fronting onto High Street and incorporation of the car park and service area would create a large space for new retail development potentially occupied by a new foodstore anchor. Sainsbury's have indicated that they would consider a relocation from their existing sub-standard unit, although we understand this particular site is too small for their requirements to justify a move. Nevertheless, our assessment has identified a clear opportunity for Waltham Cross to accommodate additional foodstore retailers.
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- 8.11 The 2008 Retail Study did not identify capacity for additional convenience goods floorspace in Waltham Cross, although this is based on current market share and must be set in the context that the nearby Tesco store at Brookfield is overtrading by c.£16m. There are clear opportunities for Waltham Cross to enhance its foodstore offer and enhance its market share. The Council should consider further land assembly opportunities to bring forward over the longer period. Brookfield would not come forward until at least 2016/18 and there is a significant period of time to encourage further development opportunities in Waltham Cross. Options for improvement should not solely form quick fix short term solutions, although these should be facilitated as equally important measures.
- 8.12 As discussed previously in this report, Hoddesdon performs well as an eating/drinking daytime and evening destination. Waltham Cross performs poorly in this particular sector and as such highlights a clear opportunity for enhancement provided any strategy focuses on quality. The most recent revised Use Classes order has enabled local authorities to control the type of eating/drinking establishment represented in a centre, and we would strongly recommend that the Council draws on this to ensure the long term health of the town centre. This might appear a small protection mechanism, but in reality such measures are crucial to ensure the long term vitality and viability of a centre. In particular, the representation of A3 and A4 uses could be more widely encouraged, whilst the representation of A5 uses is restricted in entirety, or to specific outer areas of the town centre:-
- A3 - Restaurants and Cafes
 - A4 - Drinking Establishments (public house/wine bar/consumption of alcohol)
 - A5 - Hot Food Take-Away
- 8.13 The market, trading on Wednesdays and Fridays is a significant attractor in the town centre, with 21.6% of visitors only visiting on market day. The viability, location and environment surrounding the market should be given priority in any future strategy and based on its current performance we consider the market should play a key role in the centre's health moving forwards over the LDF period.
- 8.14 We have identified three key areas to promote in Waltham Cross as an alternative to clothing, footwear/comparison goods including convenience goods retailing, the market and eating/drinking establishments. Waltham Cross is, however, a town centre at a higher level in the local retail hierarchy, and we recommend that the role of mid market/value driven comparison retailing should continue to be promoted alongside other uses to add to the overall local attraction. It should also be highlighted that the attraction of Waltham Cross as a shopper destination is not solely reliant on the mix of uses, and the environment plays a crucial role in ensuring the town centre remains and develops itself as a centre of choice for the local catchment. Investment in the physical environment and identity will be crucial to ensure Waltham Cross withstands an expanded retail offer 3.5miles to the north at Brookfield.
- 8.15 The growth of Brookfield could come forwards alongside Waltham Cross, but a complementary trading role should be encouraged further through a strategy for the centre's future role and function. It must be remembered that Brookfield is already an established retail destination which functions within the
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network of centres. PPS4 specifically states that local planning authorities should actively plan for growth and change in town centres over the period of their development plan documents by managing the role and function of existing centres by, for example, promoting and developing a specialist or new role and encouraging specific types of uses in some centres. Hoddesdon, discussed further below, successfully functions at the same level in the retail hierarchy to Waltham Cross, but on the basis of a strong convenience goods offer and service sector and eating/drinking offer.

- 8.16 Change in Waltham Cross town centre can be managed and promoted through specific policies in the LDF encouraging or restricting specific use types as discussed above, as well as bringing forward and facilitating development opportunities. Specific DPDs and other town centre strategies can be used as a tool to develop a focused strategy for change and enhancement and should be considered to ensure the implementation of strategy and policies.

Hoddesdon

- 8.17 Hoddesdon is located approximately 4.5 – 5 miles north of Brookfield, linked by the A10 main road. Our quantitative analysis demonstrates that, consistent with our qualitative findings, the impact of major retail growth at Brookfield on Hoddesdon will be marginal following additional development comprising c.50,000 sq m gross of retail. Our assessment estimates that there will be an impact of 2.9% (£0.74m) on Hoddesdon; but again, the centre is still able to achieve sustained and real growth in turnover to the period 2018.
- 8.18 These impact levels do not cause grounds for serious concern, although like Waltham Cross, we have previously stressed that the Council are advised to put in place a proactive strategy in advance of development coming forward at Brookfield. The centre needs to build on its existing strengths, and policy formulation must ensure it is able to do so. We consider that the retail function of Hoddesdon is likely to consolidate, and looking ahead the main focus of the centre will be for convenience shopping, local services and eating/drinking – continued investment in the quality of the environment will be crucial.
- 8.19 This should focus on building on the town centres strengths including food retailing, and in particular linkages from the Sainsbury's store through to the High Street, the daytime and evening eating/drinking provision, and a mix of 'everyday' retail service operators. In respect of service uses, we strongly recommend that the Council draw on the revised Use Classes Order to restrict the further growth of the undesirable A5 Fast Food Take-Away industry throughout the town centre. The figures are already above national average and there is no qualitative need for further fast food operators in the town centre. The growth in eating and drinking establishments should be from the A3 and A4 Uses including, for example, restaurants, pubs, wine bars and daytime cafes/restaurants.
- 8.20 In response to the findings of the GVA Grimley Retail Study (2008) and subsequent studies developing key retail themes, Broxbourne Borough Council have published the Draft Hoddesdon Town Centre Strategy (September/October 2009). The document responds to the requirements of PPS4 and the
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desire of the local authority to maintain a strong, healthy and vital and viable town centre; and accordingly it sets out a number of short, medium and longer term actions to implement in the town centre. Such measures will focus on Hoddesdon town centre, ensuring a pro-active strategy alongside strategic and complementary retail growth at Greater Brookfield.

Wider Sub-Region

- 8.21 Our assessment of 'global capacity' within the wider area, demonstrates a surplus expenditure capacity of between £0.9 billion to £3.5 billion by 2018, which demonstrates the scale of expenditure capacity available to support other planned development in neighbouring centres, including Enfield, Harlow and Welwyn. To put this figure into context, Greater Brookfield would achieve a turnover of only £175 million. Our analysis suggests that nearby higher order sub-regional town centres are more than likely to have more than sufficient potential within their own catchment to secure their current aspirations in parallel with the evolution of Greater Brookfield. In this context, new proposals at Greater Brookfield would be highly unlikely to deter investment elsewhere.
- 8.22 Our baseline impact assessment indicates a range of impacts on neighbouring centres, and demonstrates that in each case the level of impact predicted is more than offset by the significant scale of growth in the turnover of neighbouring centres in the period up to 2018. On this basis we conclude that the scale of development would not have any significant adverse impact on the turnover or vitality and viability of neighbouring town centres, or on their potential to accommodate new development in line with their current aspirations. In any event, our detailed assessments have identified strong centres with supportive and evolving development strategies for the future.
- 8.23 We have tested the sensitivity of our impact assessment to the effect of more cautious growth rates, and to alternative turnover assumptions. Even in our worst case scenario, adopting higher turnover assumptions and reduced expenditure growth, our conclusions on impact remain unchanged. In each case neighbouring centres will be expected to achieve significant growth in real terms, over and above the 1.5% per annum conventionally allowed for existing centres to improve their sales efficiency to maintain their vitality and viability.

Summary

- Waltham Cross has been identified as the centre most vulnerable to change at Greater Brookfield, but our assessment concludes that whilst there will be some small diversion of trade there will be no significant impact given the complementary nature of the already established trading destinations. Waltham Cross will continue to capture growth in retail expenditure and should focus on the drive for a strong mix of low/mid market and value comparison retailers, an enhanced convenience goods offer, and an improved A3/A4 eating/drinking offer. The future of Waltham Cross is viable alongside Greater Brookfield, and the ability to enhance the existing town centre offer is evident and should be facilitated through a strong town centre strategy moving forwards.

- The impact of Greater Brookfield on Hoddesdon will be more limited given proximity and the very different retail offer which focuses on localised services and shopping facilities, eating and drinking, and food shopping. We have calculated a minimal quantitative impact on Hoddesdon as a consequence of Greater Brookfield which will enable the town centre to continue to capture growth in spend to ensure sustained real growth in turnover. The Town Centre Strategy for Hoddesdon ensures a pro-active approach to the future enhancement of the centre, building on the centres strengths moving forwards and sets out achievable implementation measures in accordance with the requirements of PPS4.
- Our baseline impact assessment indicates that the level of impact predicted is more than offset by the significant scale of growth in the turnover of neighbouring centres in the period up to 2018. We conclude that the scale of development would not have any significant adverse impact on the turnover or vitality and viability of neighbouring town centres, or on their potential to accommodate new development in line with their current aspirations.

9. ECONOMIC & REGENERATION IMPACTS

- 9.1 This section provides a summary of the full Economic and Regeneration Impacts Assessment which has been undertaken as part of the wider analysis of the benefits and dis-benefits of retail/leisure development at Greater Brookfield.
- 9.2 Alongside analysis of the retail impact of principle of development at Greater Brookfield we have also considered the potential economic and regenerative impacts of the delivery of a new retail centre. The analysis forms an independent piece of advice to the Council on the potential regenerative effect of development at Greater Brookfield, including employment generation, economic and income generation and the wider impact in terms of raising the profile of the area to future investors and the ability of a retail development to tackle relative deprivation and skills issues.
- 9.3 Whilst the analysis is not set up to provide a full assessment of the specific Bayfordbury scheme it references site capacities and development quantum proposed by the Bayfordbury Masterplan to give the assessment a realistic baseline in capacity terms from which to build to the local economy and regeneration agenda.

Policy Basis

- 9.4 The first stage of the analysis was to review the regional, sub-regional and local policy context which is driving regeneration and economic development priorities within Broxbourne Borough. As noted earlier (Section 2), the regional policy framework will soon be abolished under the new coalition government, directing all decision making powers to local councils. Until such time as the evolution of change is clarified, we have retained reference to the regional policy position in this section. Our review has included consideration of:
- the East of England Plan (soon to be abolished under new coalition government);
 - the East of England Regional Economic Strategy (soon to be abolished under new coalition government);
 - the Hertfordshire London Arc Jobs Growth and Employment Land Study;
 - the Broxbourne Core Strategy Preferred Options draft DPD;
 - the Broxbourne Employment Land Study; and
 - the draft Broxbourne Economic Development Strategy.

- 9.5 In general the policy context recognises the challenges facing Broxbourne in terms of a relatively low value employment offer and low skilled workforce; it also recognises the level of out-commuting especially for higher skilled occupations.
- 9.6 Across the range of policy and strategy documents there is recognition of a need to undertake a 'staged' approach to raising the overall performance of the Broxbourne economy with near term developments and interventions needing to establish the basis for future growth by raising the quality of the offer in terms of employment, facilities and appearance. There is also recognition of the key challenge placed on Broxbourne by estimates of future economic growth and modest predicted employment growth during the plan period, where growth is largely expected to be in lower value industrial and logistics sectors.
- 9.7 This has a significant impact for the requirement of new and additional employment land, whilst some protection is required to maintain flexibility the policy base highlights the poor match between existing locations and future demand. The policy base also reflects the significant potential of Greater Brookfield to deliver employment and retail growth and assist in achieving greater levels of employment and expenditure within the Broxbourne economy.

Economic Context

- 9.8 A thorough analysis of Borough level socio-economic data was undertaken to provide a baseline context against which the economic value of development at Greater Brookfield could be assessed. This was benchmarked against performance at a County and Regional level to understand and highlight the relative strengths and weaknesses of the Broxbourne economy. From the data analysis Broxbourne is characterised by a relatively low value economy which suffers from a number of comparative structural weaknesses which present a challenge to economic growth in the future.
- 9.9 Compared to the County and Region Broxbourne's weaknesses are particularly demonstrated by: below average representation of high value sectors in terms of businesses and employment; relatively low skill levels; and a low share of the population in higher level occupations. These weaknesses provide a challenge for introducing higher value sectors in to the local economy, which is a key element of wider regeneration aims for the Borough, which will truly benefit the local workforce. The lack of a critical mass of businesses in these sectors coupled with a low skilled and low occupation workforce provides little incentive for high value businesses to locate in the area.
- 9.10 The analysis suggests a shift is required locally to encourage greater levels of high value activity, particularly in terms of increasing access to employment for the resident population through increasing skill levels. One route to achieving this is to encourage career progression and upskilling through work based learning, providing lower value jobs but supporting those employed within these sectors to develop their skills.
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- 9.11 More positively, economic activity levels are relatively high, albeit with a high proportion of the economically active not wanting a job, and long term low levels of unemployment despite a recent rise most likely linked to macro economic conditions. The delivery of forecast growth in retail and logistics employment will support and reinforce the current pattern the Broxbourne economy enabling it to maintain its high levels of economic activity and employment. These sectors also provide employment at a range of occupation levels, offering the opportunity for career progression. However they will not achieve the wider aims of regeneration and introduce significant higher value employment opportunities.

Economic Impact Assessment

- 9.12 The purpose of the Economic Impact Assessment is to quantify the anticipated benefits of the redevelopment of Greater Brookfield. The Economic Impact Assessment considers both the direct and indirect/induced effects by quantifying the potential job creation, income generation and level of consumer spend of the completed scheme. The floorspace/usage figures in the Report are based upon the indicative Masterplan put forward to the Council by Bayfordbury Estates as a proxy for the capacity Greater Brookfield offers for development and the GVA Grimley Retail Assessment (2009).

Job Creation

- 9.13 The creation of an expanded retail offer at Greater Brookfield will generate new jobs within Broxbourne, both those directly employed at Greater Brookfield and jobs created as a result of increased spend within the wider economy. To understand the full impact of Greater Brookfield and its consequent value to Broxbourne in job creation terms it is important to estimate the scale of full and part time employment, the leakage of jobs to people who live in other areas, and the induced or indirect job creation. A full explanation of the assumptions made within the model can be found in Appendix 1 of the full report, the results of this assessment approach are set out in Table 9.1.
- 9.14 To enable an estimation of full time equivalent (FTE) employment we have applied average full time: part time splits within each sector, these estimate 60% of employment to be part time in the retail elements, 52% in restaurants and bars, and 62% in leisure and hotel facilities. By applying these assumptions the full time equivalent gross direct employment impact is 1,424 jobs once Greater Brookfield is fully developed.
- 9.15 These jobs will be created at a range of levels, and as such are likely to provide employment opportunities for the majority of Broxbourne residents. Research undertaken by the LSC in 2008 calculated the proportion of retail sector employees by qualification level (as NVQ Equivalent level) across the East of England; applying this to the gross retail jobs created (1,225) provides an estimate of the type of jobs likely to be created at Greater Brookfield.

Table 9.1: Estimated Retail Employment by Qualification

Qualification Level (NVQ Equivalent)	Proportion of Employment	Numbers of Jobs
Level 1 or Below	28%	343
Level 2	39%	478
Level 3 and Above	32%	392
Other	1%	12
TOTAL	100%	1,225

- 9.16 Based on employment and commuting patterns it is unrealistic to assume that all of the jobs created at Greater Brookfield will be taken by Broxbourne residents, therefore it is important to apply an adjustment for 'leakage' of employment to other areas. Leakage rates have been estimated from Census Travel to Work data (2001) for each projected employment use and result in the estimation that 698 full time equivalent new jobs will be taken up by Broxbourne residents, approximately 50% of all opportunities.
- 9.17 By applying an employment multiplier¹ to the net full time equivalent job estimate it is possible to anticipate the indirect benefit accrued within Broxbourne. The indirect job creation within Broxbourne is likely to be in the region of 163 full time equivalent jobs, and therefore the total employment impact within Broxbourne of development at Greater Brookfield is estimated to be 862 full time equivalent jobs. For the purposes of this assessment we have assumed that displacement of jobs from other areas within Broxbourne is likely to be zero.

Income Generation

- 9.18 As a result of job creation within Greater Brookfield significant additional income will be created within the Broxbourne economy, based on average wages per sector we estimate this to be in the region of £15mn per annum. Based on English Partnership's "Additionality Guide" we anticipate the value of the Greater Brookfield redevelopment (in terms of earned income) to be in the region of £22m per annum to the East of England, through the creation of additional income beyond Broxbourne of £7m.
- 9.19 Beyond earned income it is also important to understand the economic impact and value of visitor spend within Greater Brookfield and the scale of new visitors drawn to the area because of its presence. The retail assessment for the proposed new development at Greater Brookfield estimates that average turnover in 2018 (under a 'conservative' base case growth scenario) will be in the region of £175mn; based on an estimated average total spend per visitor (of £85) it is calculated that approximately 2mn visitors will be drawn to the new centre.

¹ Employment Multipliers have been sourced for the English Partnerships Additionality Guide, 2005.

- 9.20 The retail assessment also estimates that approximately 15% of expenditure will be drawn from within other Broxbourne centres, therefore not all 2mn visitors will be 'new' and therefore an estimate needs to be made of this 'displacement'. Adjusting for this displacement the estimated additional visitor draw to Greater Brookfield will be in the region of 1.75mn, creating a net direct additional spend within Broxbourne of £149m.
- 9.21 Beyond the direct expenditure at Greater Brookfield there is likely to be a level of additional spending within the Broxbourne economy by visitors. Visitor surveys undertaken by (and on behalf of) Visit Britain estimate broad levels of additional spend generated by trips to retail centres. The estimated additional spend generated within Broxbourne would be approximately £52.5mn. Taking into account both direct and indirect additional expenditure the total additional expenditure generated by development of Greater Brookfield would be in the region of £200mn.

Wider Regenerative Impact

- 9.22 Whilst the redevelopment of Greater Brookfield will not in its own right address the low value nature of the local economy, it will (in the long term) assist in addressing some of the weaknesses of the area to encourage higher value activity in the future. It can therefore play an important role in laying the foundations for future higher levels (and value) of employment growth.
- 9.23 The development offers the potential for Broxbourne to tackle a number of the key themes identified within the Community Plan and Economic Development Strategy, focusing on addressing the relative weaknesses within the local labour market and the range of employment opportunities on offer. It will also help deliver wider County and Regional objectives by providing high quality employment opportunities which encourage greater participation in the labour market by residents. It will also deliver greater levels of choice for residents, increasing local provision and creating a destination to attract visitors to the sub-region.
- 9.24 Significantly it will also increase the opportunity for work related training, equipping residents with greater transferable skills which can be deployed in other sectors of the economy. These factors will be vital for increasing the skill base of the local economy and providing a more highly skilled workforce which, in turn, will help to attract higher value activities in the long term.
- 9.25 In wider regeneration terms Greater Brookfield will help create a more complete offer within Broxbourne, reducing the loss of trade to other areas and providing an impetus for shifting the perception of the area both for visitors, residents and businesses. Greater Brookfield can provide a drive for regeneration by complementing the offer within Broxbourne at key traditional employment sites, aligning to town centre regeneration and the maintaining momentum gained from the London Olympics.

Summary

- In conclusion the development of a mixed use, retail led scheme is likely to be of considerable net benefit to the local economy over and above the maintenance of the 'status quo'. The completion of the scheme will deliver a significant number of new jobs to the area and generate additional income within the local economy which will sustain greater levels of economic growth in the future.
- Development would also provide greater employment opportunities for residents with low or no formal skills or qualifications, and the chance for work based training to enhance their future employment choices. This will make a significant contribution to addressing the relative poverty, deprivation and skills issues in the local labour pool. In the long run the potential broadening of services and facilities provided and any subsequent improved perception of the area will assist in attracting inward investment to other employment sites within the Borough.
- Overall, development at Greater Brookfield can provide a key component of the wider improvements required to create an uplift of quality and perception in the area, providing a strong foundation from which to encourage higher value growth throughout the Borough in the future.

10. ATMOSPHERIC CONSIDERATIONS

- 10.1 Scott Wilson form part of the Broxbourne consultant team, inputting to the robust evidence base required to test strategic retail/leisure growth at Greater Brookfield. In accordance with current Government policy, local authorities are required to plan for pro-active change, identifying deficiencies in town centre provision, reducing the need to travel and testing the impact of site allocations/development proposals on atmospheric emissions/climate change. Scott Wilson have consequently prepared an Atmospheric Emissions Inventory to allow the impact of specific measures to be considered with respect to the magnitude of emissions from road vehicles on journeys to and from retail centres.
- 10.2 The focus of the study is concerned with land in the vicinity of Halfhide Lane, to the west of A10 Great Cambridge Road in Greater Brookfield, Broxbourne. The development proposals are for a retail-led scheme and would provide residents of Broxbourne and the surrounding areas with an alternative choice of destination for shopping based activities. Any change in choice of shopping destination would change the routes and total distances travelled by shoppers and there would be a corresponding change in the magnitude of exhaust emissions created by the vehicles in which they travel. This study provides design life estimates of the magnitude of emissions of carbon dioxide (as carbon), oxides of nitrogen, particulate matter and total hydrocarbons, for with development and without development scenarios.

Scope

- 10.3 The assessment considers three scenarios for each year from 2018 to 2038:
- **Do-Minimum Scenario** – represents a situation in which the choice of shopping venues remains as it currently is and patterns of venue choice remain unchanged over time.
 - **Base Scenario (non-cautious)** – represents a situation in which a new retail venue is in operation in Greater Brookfield, where a non-cautious estimate of venue choice is applied.
 - **Base Scenario (cautious)** – represents a situation in which a new retail venue is in operation in Greater Brookfield, where a cautious estimate of venue choice is applied.
- 10.4 The estimates are based on the results of a telephone survey of choice of venue provided to Scott Wilson. As part of that survey information, assumptions have been made as to the predicted 'non-cautious' and 'cautious' travel patterns that are expected to occur, following the provision of the Greater Brookfield retail facilities. To summarise these assumptions:
- **Non-Cautious** – Those that shop in the study area are predicted to change their shopping and corresponding travel habits, in favour of Greater Brookfield, on the basis of the retail offer that will be provided there.
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- **Cautious** – Those that shop locally are predicted to generally retain their existing shopping and travel habits, whilst those that travel further for shopping are predicted to be more likely to change their shopping and corresponding travel habits, in favour of Greater Brookfield, on the basis of the retail offer that will be provided there.

Overview of Approach

Inventory Input Information

- 10.5 The telephone survey data details shopper's residential location, the location of their preferred shopping venue and the associated mode of travel. The survey grouped the survey responses into 12 zones (Appendix 1), based on the residential location of the individuals surveyed. Zones 1 to 4 represent residents of Broxbourne.
- 10.6 The mode of travel was either by car, by taxi, by van or by public transport. The route and likely road speeds vary for these vehicle types depending on the location of residential properties and the location of shopping venues. Scott Wilson's transport team derived activity rate data for vehicle movements associated with the journeys registered by the telephone survey.
- 10.7 Activity rate data is in the form of vehicle kilometres travelled between zones, for each mode of travel. This information was subdivided by activity associated with speed limits of 30 mph to 70 mph, in 10 mph intervals. The method used to derive activity rate data is summarised in Appendix 16 of this report.

Calculation of Emissions per Zone

- 10.8 Emission factors have been calculated for journeys between zones made by each mode of travel, based on the vehicle emissions database contained in the Design Manual for Roads and Bridges. These emission factors are based on a reference activity rate of 100 vehicles making one-way trips. By multiplying the emission factor by the projected number of trips made between zones (the activity rate), an estimate of emissions for each pollutant is derived.
- 10.9 A breakdown of the emissions for return trips starting in each zone are reported in the summary tab of each scenario spreadsheet, and further information relating to this is provided at Appendix 17.

Calculation of Total Emissions for Each Scenario

- 10.10 The total emission for each pollutant is the sum of the emissions for return journeys starting in each zone. Total emissions are reported for carbon dioxide (as carbon), oxides of nitrogen, particulate matter and total hydrocarbons.

Emission Estimates

10.11 The magnitude of emissions associated with round trips from each zone are displayed in Appendix 18 of this report:

- Figure DC1 summaries emissions of Carbon for the three scenarios
- Figure D2 summaries emissions of oxides of nitrogen (NO_x) for the three scenarios
- Figure D3 summaries emissions of particulate matter (PM₁₀) for the three scenarios
- Figure D4 summaries emissions of total hydrocarbon (THC) for the three scenarios

Do-Minimum Scenario Emission Estimates

10.12 Spreadsheet D127404_AEI_DM.xls contains the emission estimate calculations for the Do Minimum scenario. In the Do-Minimum scenario total emissions of carbon in the assumed opening year of 2018 are 55 thousand tonnes (Table 10.1). For the design period of this study (2018 to 2038) the total emissions are estimated to be 1.25 million tonnes of carbon.

Table 10.1: Do-Minimum Scenario Emission Estimates

Period	Carbon (T/yr)	NO _x (Kg/yr)	PM ₁₀ (Kg/yr)	THC (Kg/yr)
2018	55,000	447,000	9,000	86,000
Total for 2018 to 2038	1,248,000	9,400,000	186,000	2,103,000

Figures D1 to D4 include the raw inventory values, but values in this table have been rounded to a more meaningful number of significant figures.

10.13 The single largest contribution to emissions is from travel starting in zone 6. This zone (Waltham Abbey) includes markedly higher bus, taxis and car/van vehicle kilometres travelled than any other zone. Currently this population shop at distant venues on a more regular basis than residents of other groups.

Baseline (Non-Cautious) With-Development Emission Estimates

10.14 Spreadsheet D127404_AEI_DS_Base.xls contains the emission estimate calculations for the Baseline (Non-Cautious) scenario. In the Baseline (Non-Cautious) with-development scenario total emissions of carbon in the assumed opening year of 2018 are 50 thousand tonnes (Table 10.2). For the design period of this study (2018 to 2038) the total emissions are estimated to be 1.12 million tonnes of carbon. Over the design life of the development the estimated reduction in carbon emissions from shopping related travel is 9.9%, relative to the Do-Minimum Scenario.

Table 10.2: Baseline (Non-Cautious) with Development Scenario Emission Estimates

Period	Carbon (T/yr)	NO _x (Kg/yr)	PM ₁₀ (Kg/yr)	THC (Kg/yr)
2018	50,000	403,000	8,000	78,000
Total for 2018 to 2038	1,124,000	8,465,000	170,000	1,898,000

Figures D1 to D4 include the raw inventory values, but values in this table have been rounded to a more meaningful number of significant figures.

Baseline (Cautious) With-Development Emission Estimates

- 10.15 Spreadsheet D127404_AEI_DS_CAUTIOUS.xls contains the emission estimate calculations for the Baseline (Cautious) scenario. In the Baseline (Cautious) with-development scenario total emissions of carbon in the assumed opening year of 2018 are 49 thousand tonnes (Table 10.3). For the design period of this study (2018 to 2038) the total emissions are estimated to be 1.11 million tonnes of carbon. Over the design life of the development the estimated reduction in carbon emissions from shopping related travel is 11.5%, relative to the Do-Minimum Scenario.

Table 10.3: Baseline (Cautious) With-Development Scenario Emission Estimates

Period	Carbon (T/yr)	NO _x (Kg/yr)	PM ₁₀ (Kg/yr)	THC (Kg/yr)
2018	49,000	396,000	8,000	76,000
Total for 2018 to 2038	1,105,000	8,328,000	165,000	1,868,000

Figures D1 to D4 include the raw inventory values, but values in this table have been rounded to a more meaningful number of significant figures.

Summary

- This analysis has identified that if existing patterns of shopping and travel behaviour were to continue over the period from 2018 to 2038, then the total emissions of carbon attributable to such journeys would be 1.25 million tonnes.
- For the Baseline (non-cautious) scenario, which assumes that shoppers in the area may change their habits in favour of new facilities at Greater Brookfield (for both local and journeys over slightly greater distances), the projected journeys would generate 1.12 million tonnes of carbon between 2018 and 2038. This equates to a reduction in emissions of carbon of 9.9%, relative to the Do-Minimum scenario (which excludes the provision of new retail facilities at Greater Brookfield).

- For the Baseline (cautious) scenario, which assumes that shoppers who travel slightly further afield may change their habits in favour of new facilities at Greater Brookfield (whilst other local shoppers would be expected to continue to shop at the same destinations), the projected journeys would generate 1.11 million tonnes of carbon between 2018 and 2038. This equates to a reduction in emissions of carbon of 11.5%, relative to the Do-Minimum scenario (which excludes the provision of new retail facilities at Greater Brookfield).
- As a guide, it has been calculated that the carbon savings calculated for the non-cautious and cautious scenarios, would be roughly equivalent to 2.2 and 2.5 million km travelled by a bus, respectively. The analysis therefore indicates that there are expected to be air quality related benefits associated with providing retail facilities at Greater Brookfield, as this has the ability to reduce the number of longer-distance trips to other retail facilities.
- Emissions of oxides of nitrogen, particulate matter and total hydrocarbons follow a similar pattern of change to those predicted for carbon. Although a reduction in total emissions in these pollutants is helpful in reducing background concentrations of these pollutants, it is unlikely that these emissions would translate into perceptible changes in measure concentrations at air quality sensitive locations.

11. CONCLUSIONS

- 11.1 Our analysis has demonstrated the significant leakage of trade to competing shopping destinations in the wider Sub-Region, generating unsustainable travel patterns, high carbon emissions and an outflow of jobs and wider economic benefits. The four centres of Waltham Cross, Brookfield, Hoddesdon and Cheshunt retain only 36% of Borough comparison goods expenditure, and this figure is set to decline following planned and committed retail and town centre investment throughout the sub-region.
- 11.2 All competing retail destinations are implementing, or have recently implemented, major town centre enhancements which will ensure a stronger positioning in the Sub-Region moving forwards; in turn leading to the continued polarisation of the larger centres and significant challenges for the Borough without corresponding improvements to its own facilities.
- 11.3 A number of Evidence Base documents in adjoining authorities have identified significant quantitative need, but not the physical sites to accommodate the full extent of these economic forecasts. Our quantitative global Sub-Regional forecasts are consistent with such conclusions which identify significant growth and 'surplus expenditure' of around £2.5 billion by 2018. This is more than sufficient to support all aspirations throughout the Sub-Region in addition to proposals at Greater Brookfield which would only absorb c.£175m.
- 11.4 Brookfield has a small influence beyond the Borough boundary at the current time; with a market share of only 9.9% in the outer survey zones (5-12). This is expected to increase to only 16.2%, and whilst consolidating its catchment area, will not expand to any significant extent into adjoining centre catchment areas, i.e. Harlow and Enfield. Indeed, within the Borough boundary (Survey Zones 1-4), market share is only expected to increase from 35.9% to 57.6%.
- 11.5 Our assessment has demonstrated, through a series of sensitivity tests, that the Greater Brookfield site is the most appropriate to ensure the required critical mass of retailing to claw-back lost shoppers to the Borough. Waltham Cross, Hoddesdon and Cheshunt do not have comparable development sites and will continue to perform well in complementary roles alongside new retail growth at Brookfield. The impact assessment demonstrates no significant harm to any centre within the Borough or beyond, with each able to achieve at least growth in real terms, together with the realisation of all strategic aspirations.
- 11.6 Greater Brookfield will, crucially, generate a significant number of new jobs within the Borough, contributing to sustained economic growth; and provide strong foundations through the enhanced quality and perceptions of the area from which to encourage higher value growth throughout the Borough in the future. Greater Brookfield is entirely consistent with policy reducing atmospheric emissions by up to 11.5%.
-

- 11.7 The evidence base demonstrates the need for retail growth of a critical mass in Broxbourne to recapture lost expenditure and to ensure investment of sufficient scale to generate a significant number of jobs and investment which in turn provides the platform of improved perceptions in order to facilitate and encourage future growth. Importantly, the Greater Brookfield proposed development will have the effect of clawing back longer distances, without any significant impact on the network of centres in the wider Sub-Region, whilst reducing carbon emissions.

Broxbourne Borough Council

**Retail and Town Centres:
Evidence Base Bridging Report**

Plans & Appendices
July 2010

Reference: P:/Planning/643

Contact: Caroline Marginson

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PLANS

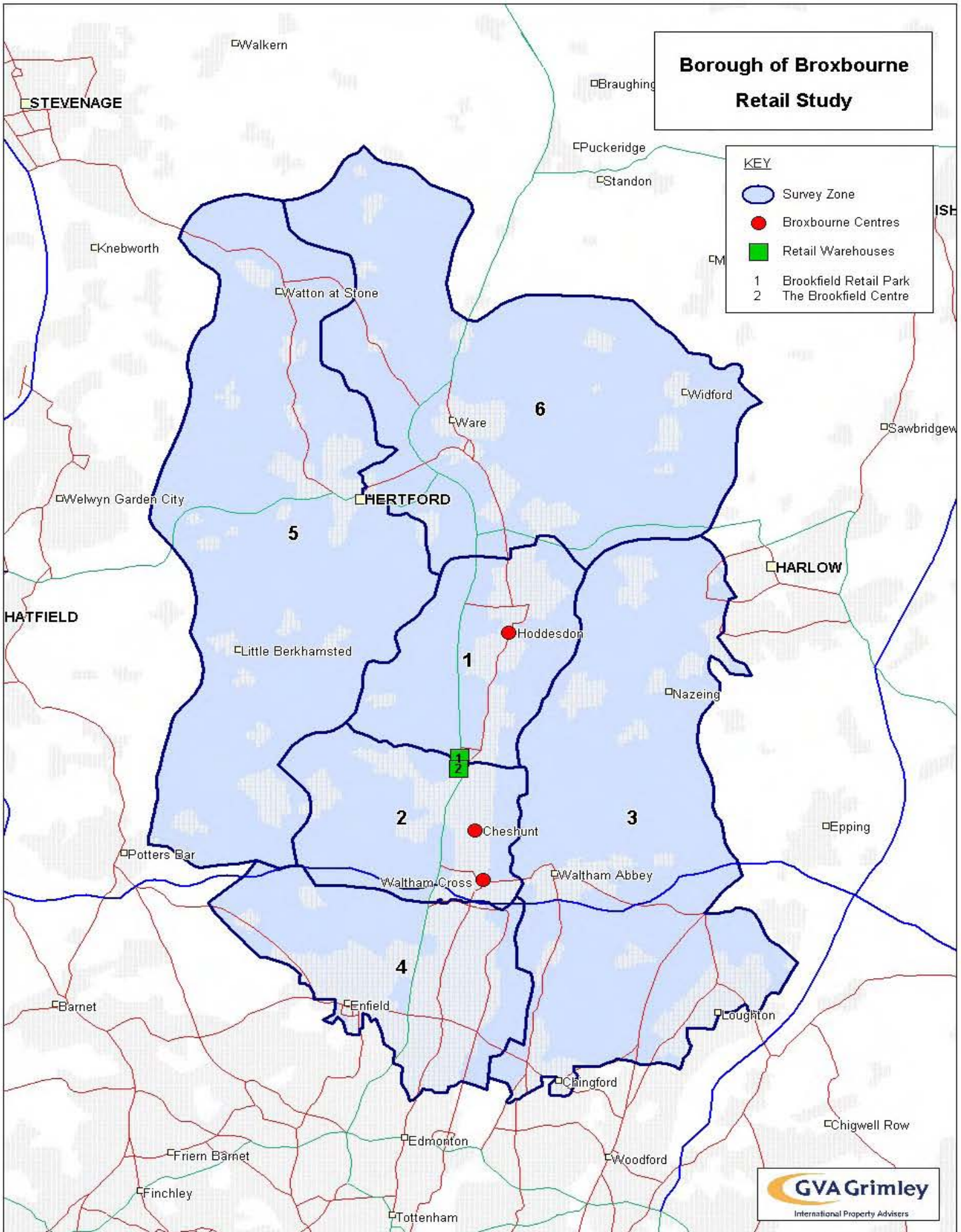
PLAN 1

THE BROXBOURNE CENTRES

Borough of Broxbourne Retail Study

KEY

-  Survey Zone
-  Broxbourne Centres
-  Retail Warehouses
- 1 Brookfield Retail Park
- 2 The Brookfield Centre



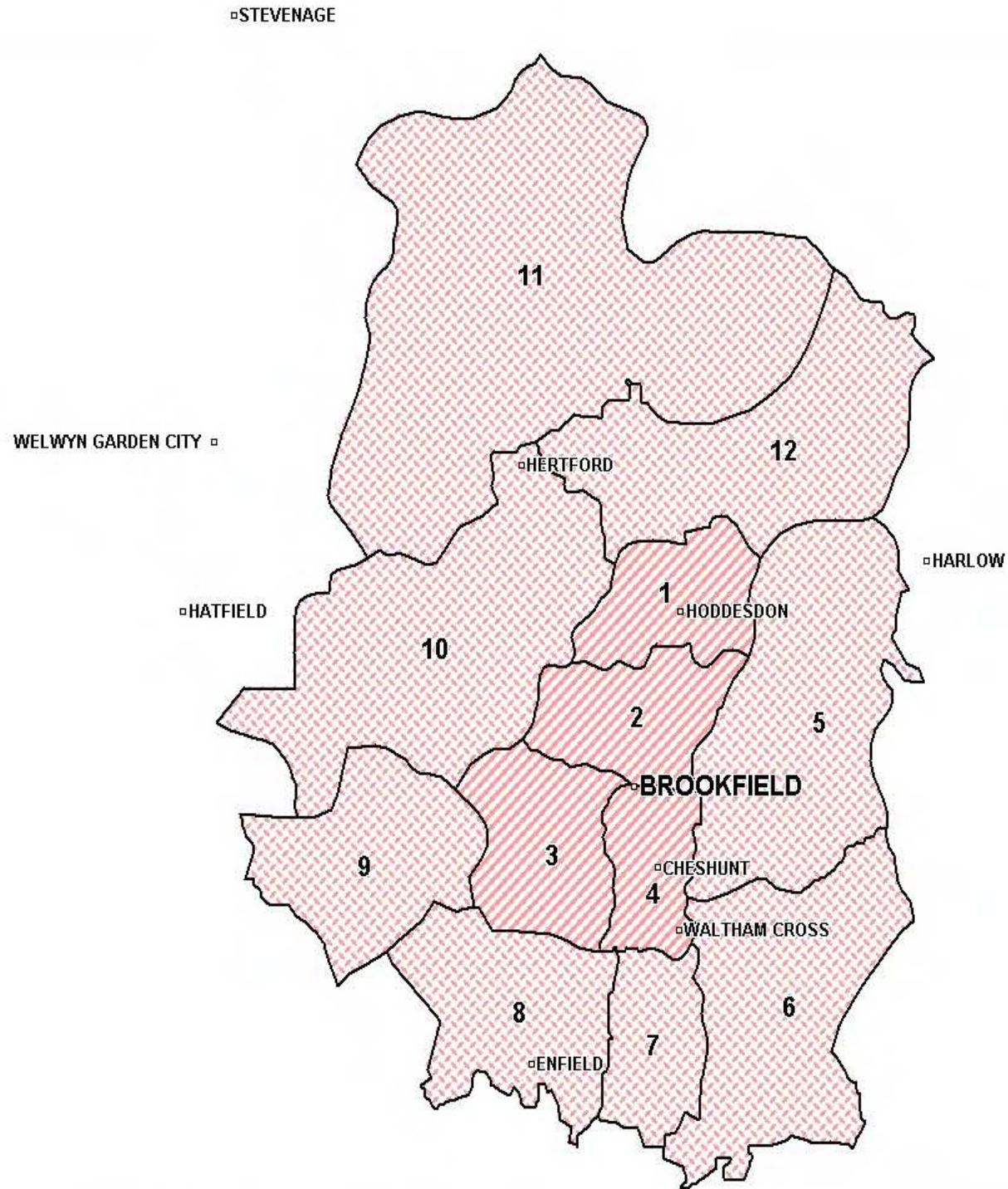
PLAN 2

GREATER BROOKFIELD CATCHMENT PRE RETAIL GROWTH

BROXBOURNE RETAIL STUDY

Brookfield Comparison Goods Market Share

No New Development (2008)



KEY

Comparison Goods Market Share (%)

	2 - 9.9
	10 - 19.9
	20 - 29.9
	30 - 39.9
	40 - 49.9
	50 - 59.9

PLAN 3

GREATER BROOKFIELD CATCHMENT POST RETAIL GROWTH

STEVENAGE

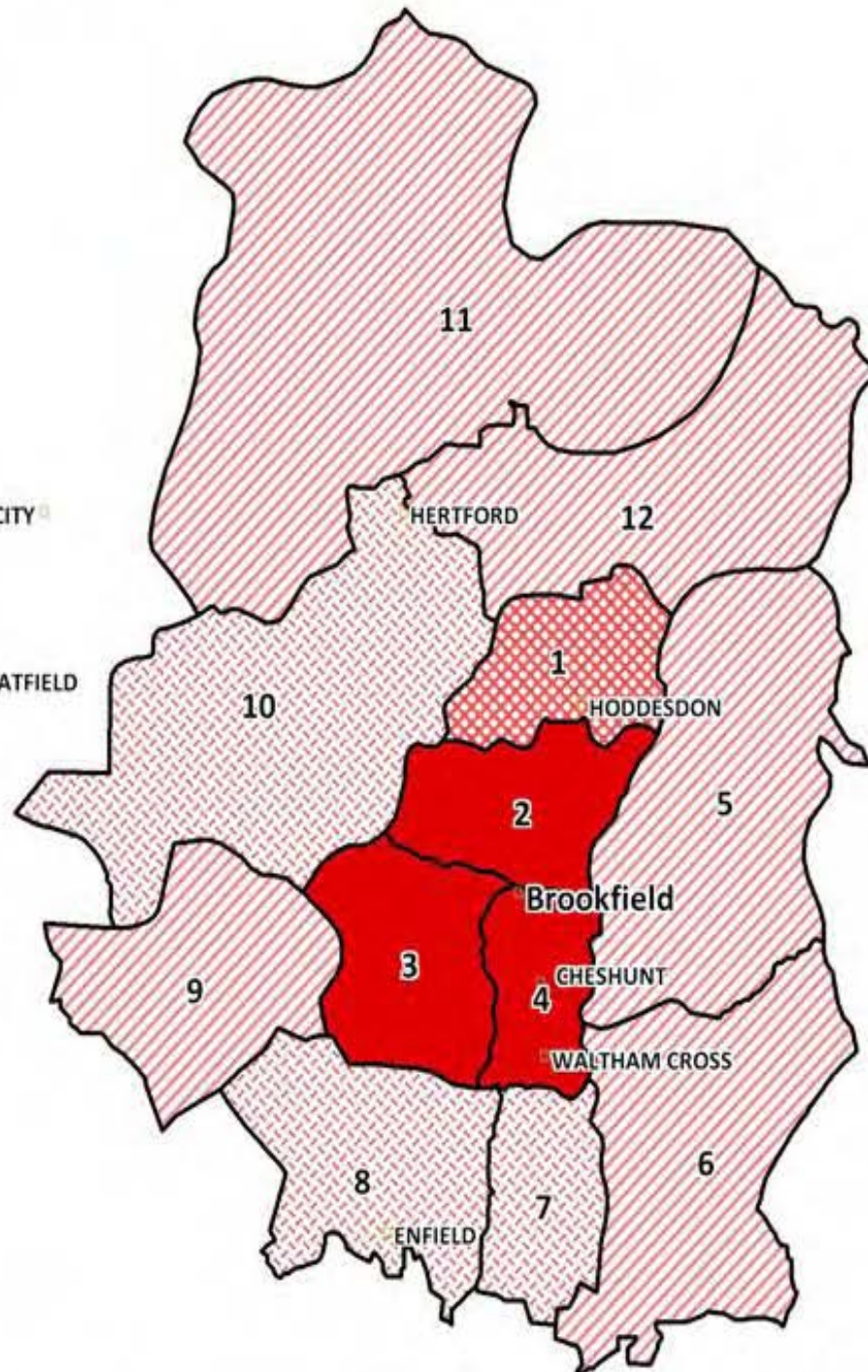
Broxbourne Retail Study
Brookfield Comparison Goods
Market Share
Post Greater Brookfield
Development (2018)

WELWYN GARDEN CITY

HATFIELD

HERTFORD

HARLOW



Key

Comparison Goods
Market Share (%)



GVA Grimley
International Property Advisers

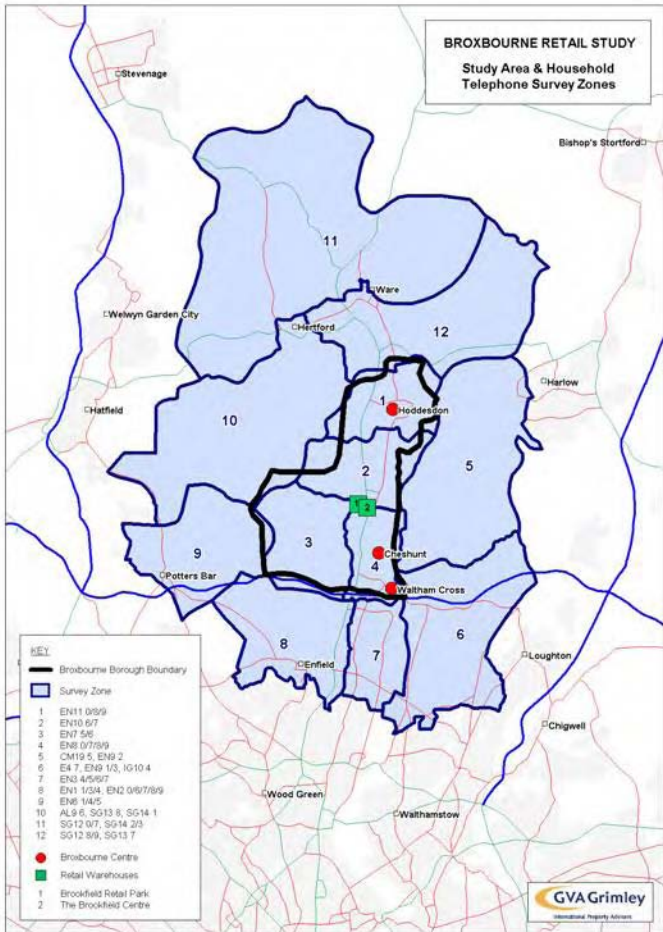
APPENDICES

APPENDIX 1

HOUSEHOLD TELEPHONE SURVEY AREA

BROXBOURNE RETAIL STUDY

Study Area & Household Telephone Survey Zones



KEY

— Broxbourne Borough Boundary

□ Survey Zone

- 1 EN11 0R/9
- 2 EN10 6/7
- 3 EN7 5/6
- 4 EN8 0/7/8/9
- 5 CM19 5, EN9 2
- 6 E4 7, EN9 1/3, IG10 4
- 7 EN3 4/5/6/7
- 8 EN1 1/3/4, EN2 0/6/7/8/9
- 9 EN6 1/4/5
- 10 AL9 6, SG13 8, SG14 1
- 11 SG12 0/7, SG14 2/3
- 12 SG12 8/9, SG13 7

● Broxbourne Centre

■ Retail Warehouses

1 Brookfield Retail Park

2 The Brockfield Centre

APPENDIX 2

COMPARISON GOODS SHOPPING PATTERNS

BROXBOURNE BOROUGH COUNCIL COMPETING CENTRES MODELLING 2009

TABLE 1
SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	2009	2013	2018	2023	2026
1	EN11 0/8/9	20,526	21,208	21,811	22,555	22,940
2	EN 10 6/7	15,909	16,343	16,909	17,415	17,680
3	EN 7 5/6	21,428	22,109	22,960	23,774	24,250
4	EN 8 0/7/8/9	33,255	34,038	35,008	35,957	36,533
5	CM 19 5, EN 9 2	13,734	14,377	15,149	15,660	15,952
6	EN 9 1/2, 1G 10 4, E4 7	31,655	31,744	31,935	32,402	32,708
7	EN 3 4/5/6/7	48,538	50,435	52,501	54,535	55,905
8	EN 2 8/9, EN1 1/3/4, EN 2 0/6/7	67,715	68,789	70,093	71,398	72,422
9	EN 6 1/4/5	15,450	15,547	15,802	16,127	16,285
10	SG 13 8, AL 9 6, SG 14 1	10,043	10,371	10,883	11,324	11,539
11	SG 14 2/3, SG 12 0/7	34,547	35,903	37,399	38,869	39,643
12	SG 13 7, SG 12 8/9	22,112	23,167	24,504	25,814	26,453
TOTAL		334,912	344,031	354,954	365,830	372,310

SOURCE: Experian Business Solutions, April 2008

TABLE 1A
POPULATION GROWTH RATES

2009-2013 (%)	2009-2018 (%)	2009-2023 (%)	2009-2026 (%)
3.3	6.3	9.9	11.8
2.7	6.3	9.5	11.1
3.2	7.1	10.9	13.2
2.4	5.3	8.1	9.9
4.7	10.3	14.0	16.1
0.3	0.9	2.4	3.3
3.9	8.2	12.4	15.2
1.6	3.5	5.4	7.0
0.6	2.3	4.4	5.4
3.3	8.4	12.8	14.9
3.9	8.3	12.5	14.8
4.8	10.8	16.7	19.6
2.7	6.0	9.2	11.2

BROXBOURNE BOROUGH COUNCIL COMPETING CENTRES MODELLING 2010

**TABLE 2
COMPARISON GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2007 PRICES)**

GROWTH IN PER CAPITA RETAIL EXPENDITURE: 3.80 %pa 2007-2026												
ZONE	2007		2009		2013		2018		2023		2026	
	Minus SFT at 6.2%		Minus SFT at 6.3%		Minus SFT at 8%		Minus SFT at 8.5%		Minus SFT at 8.5%		Minus SFT at 8.5%	
1	3,112	2,919	3,353	3,142	3,892	3,581	4,690	4,292	5,652	5,172	6,321	5,784
2	3,286	3,082	3,540	3,317	4,110	3,781	4,953	4,532	5,968	5,461	6,674	6,107
3	3,192	2,994	3,439	3,223	3,993	3,673	4,811	4,402	5,797	5,304	6,484	5,932
4	2,878	2,700	3,101	2,906	3,600	3,312	4,338	3,969	5,227	4,783	5,846	5,349
5	3,256	3,054	3,508	3,287	4,073	3,747	4,907	4,490	5,913	5,411	6,614	6,051
6	3,217	3,018	3,466	3,248	4,024	3,702	4,849	4,437	5,843	5,346	6,534	5,979
7	2,492	2,337	2,685	2,516	3,117	2,868	3,756	3,437	4,526	4,141	5,062	4,631
8	1,747	1,639	1,882	1,764	2,185	2,010	2,633	2,409	3,173	2,903	3,548	3,247
9	3,582	3,360	3,859	3,616	4,480	4,122	5,399	4,940	6,506	5,953	7,276	6,657
10	3,399	3,188	3,662	3,432	4,251	3,911	5,123	4,688	6,173	5,648	6,904	6,317
11	3,314	3,109	3,571	3,346	4,145	3,814	4,995	4,570	6,019	5,507	6,731	6,159
12	3,356	3,148	3,616	3,388	4,198	3,862	5,058	4,628	6,095	5,577	6,817	6,237

Source: Experian Business Strategies and Expenditure Data for Broxbourne

**TABLE 3
SURVEY AREA COMPARISON GOODS RETAIL EXPENDITURE FORECASTS**

ZONE	2009	2013	2018	2023	2026
	(£000)	(£000)	(£000)	(£000)	(£000)
1	64,488	75,947	93,607	116,644	132,679
2	52,777	61,798	76,626	95,098	107,974
3	69,052	81,209	101,071	126,108	143,862
4	96,623	112,727	138,947	171,970	195,410
5	45,146	53,867	68,024	84,733	96,532
6	102,808	117,513	141,680	173,221	195,558
7	122,114	144,628	180,430	225,841	258,922
8	119,430	138,288	168,873	207,280	235,144
9	55,871	64,083	78,060	95,997	108,414
10	34,463	40,564	51,014	63,963	72,894
11	115,584	136,916	170,925	214,060	244,169
12	74,918	89,467	113,410	143,965	164,994
TOTAL	953,273	1,117,007	1,382,667	1,718,880	1,956,552

Source: Tables 1&2

BROXBOURNE BOROUGH COUNCIL
COMPETING CENTRES MODELLING 2009

TABLE 4
COMPARISON GOODS ALLOCATION 2007:-SUB-REGIONAL SHOPPING PATTERNS
% MARKET SHARE

	BLUEWATER SHOPPING CENTRE	ENFIELD	HARLOW	HATFIELD	HERTFORD	LAKESIDE SHOPPING CENTRE	LONDON (WEST END)	STEVENAGE	WATFORD	WELWYN GARDEN CITY	ENFIELD RETAIL PARKS	MADFORD RETAIL PARK, HERTFORD	ROARING MEG RETAIL PARK, STEVENAGE	SUB-TOTAL	OTHER	TOTAL
1	0.3	1.1	35.2	0.5	3.0	1.1	2.2	0.3	0.0	6.5	1.2	0.1	0.0	51.4	48.6	100
2	1.0	2.0	17.5	0.6	0.9	1.2	5.6	0.2	0.3	8.2	3.3	0.3	0.0	41.1	58.9	100
3	0.8	11.0	6.5	1.0	0.5	4.0	2.3	0.0	0.2	9.8	8.1	0.0	0.0	44.1	55.9	100
4	0.0	6.1	6.2	0.3	0.4	2.0	0.4	0.3	0.0	1.3	7.7	0.0	0.0	24.6	75.4	100
5	0.9	1.5	50.3	0.0	0.5	4.0	2.4	0.5	0.0	4.8	1.8	0.0	0.0	66.7	33.3	100
6	1.1	4.7	12.4	0.0	0.0	5.3	6.0	0.0	0.0	1.0	6.9	0.3	0.9	38.6	61.4	100
7	0.2	37.9	1.9	0.7	0.7	0.7	3.3	0.0	0.3	0.0	16.1	0.0	0.0	61.8	38.2	100
8	0.9	41.1	2.0	0.5	0.1	0.3	3.5	0.0	1.9	2.6	21.8	0.0	0.0	74.7	25.3	100
9	0.0	7.6	0.3	3.8	0.1	0.0	4.9	2.8	1.9	21.7	3.5	0.0	0.7	47.3	52.7	100
10	0.3	1.7	2.4	3.2	20.2	1.2	4.0	7.1	0.2	25.6	0.7	2.6	0.4	69.8	30.2	100
11	0.3	0.7	15.2	3.9	13.1	0.0	2.6	14.4	0.0	14.6	0.2	0.7	2.2	68.0	32.0	100
12	0.5	1.3	26.5	1.9	10.7	0.5	3.3	2.9	0.9	18.0	0.3	0.6	0.0	67.5	32.5	100

Source: Household telephone survey / Experian Business Strategies

TABLE 5
COMPARISON GOODS ALLOCATION 2007:-SUB-REGIONAL SHOPPING PATTERNS
£ (000s) MARKET SHARE

	BLUEWATER SHOPPING CENTRE	ENFIELD	HARLOW	HATFIELD	HERTFORD	LAKESIDE SHOPPING CENTRE	LONDON (WEST END)	STEVENAGE	WATFORD	WELWYN GARDEN CITY	ENFIELD RETAIL PARK, ENFIELD	MADFORD RETAIL PARK, HERTFORD	ROARING MEG RETAIL PARK, STEVENAGE	SUB-TOTAL	OTHER	TOTAL SPEND
1	168	730	22,706	312	1,953	689	1,395	168	0	4,188	763	51	0	33,123	31,365	64,488
2	532	1,047	9,255	330	453	610	2,933	93	151	4,344	1,735	184	0	21,667	31,110	52,777
3	561	7,575	4,454	681	312	2,771	1,591	0	131	6,789	5,567	0	0	30,431	38,622	69,052
4	0	5,913	5,988	276	365	1,980	365	276	0	1,254	7,395	0	0	23,812	72,812	96,623
5	429	660	22,699	0	246	1,828	1,086	214	0	2,144	821	0	0	30,129	15,017	45,146
6	1,168	4,855	12,742	0	0	5,435	6,119	0	0	1,049	7,101	332	905	39,707	63,101	102,808
7	231	46,272	2,309	876	869	876	4,016	0	349	0	19,641	0	0	75,439	46,675	122,114
8	1,069	49,087	2,430	551	95	386	4,189	0	2,317	3,050	26,076	0	0	89,250	30,180	119,430
9	0	4,253	174	2,109	49	0	2,748	1,584	1,069	12,117	1,934	0	368	26,405	29,466	55,871
10	116	596	821	1,098	6,970	414	1,383	2,457	74	8,812	254	893	150	24,039	10,424	34,463
11	331	842	17,613	4,465	15,103	0	3,010	16,691	0	16,862	279	808	2,550	78,553	37,031	115,584
12	409	966	19,832	1,452	8,025	346	2,457	2,189	644	13,518	246	469	0	50,553	24,364	74,918
TOTAL	5,013	122,795	121,024	12,150	34,440	15,335	31,290	23,672	4,735	74,127	71,814	2,739	3,972	523,107	430,166	953,273

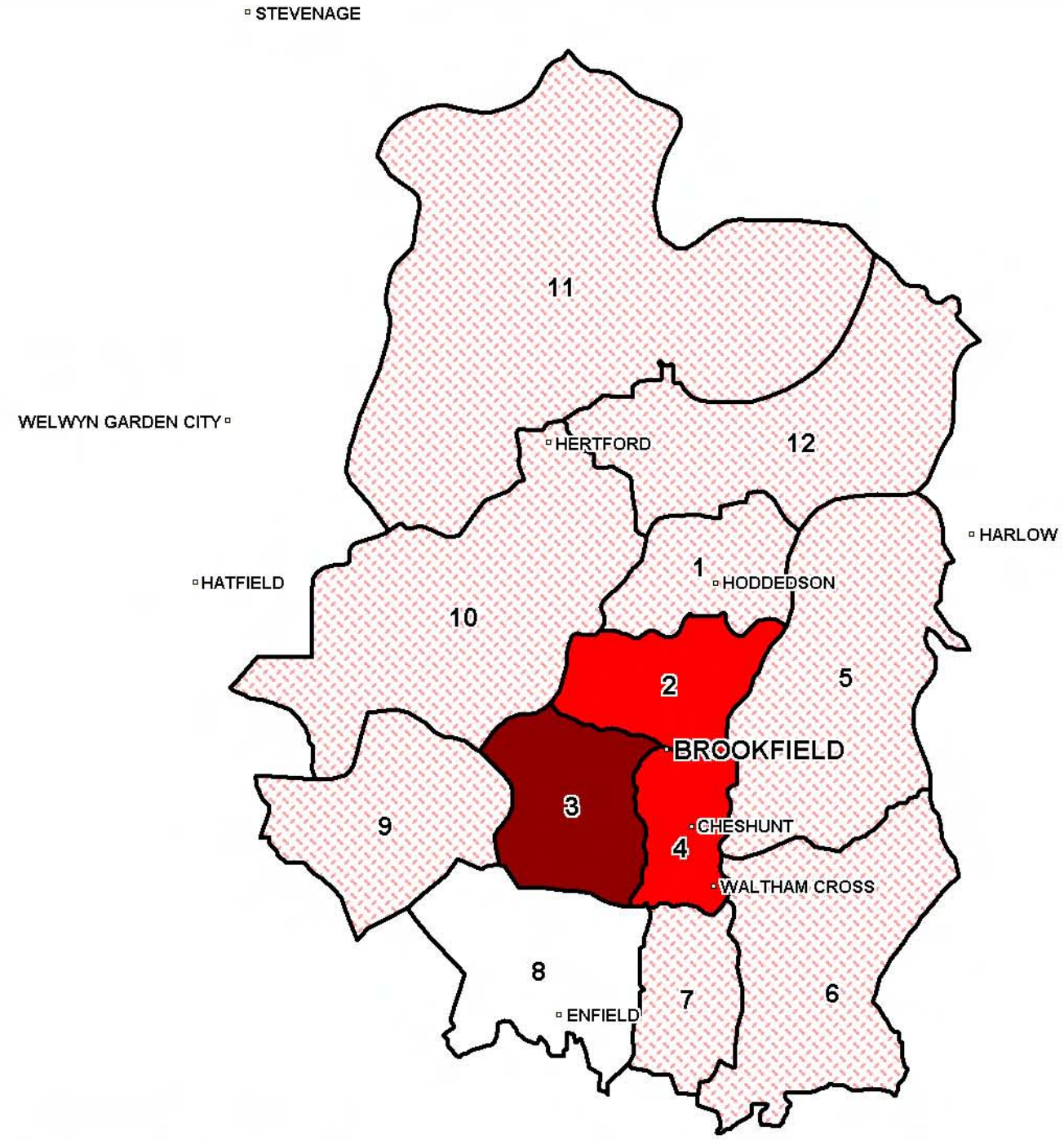
Source: Household telephone survey / Experian Business Strategies

APPENDIX 3

BROXBOURNE CENTRE'S: CONVENIENCE & COMPARISON GOODS MARKET SHARES

BROXBOURNE RETAIL STUDY

Brookfield Convenience Goods Market Share



KEY

Convenience Goods Market Share (%)

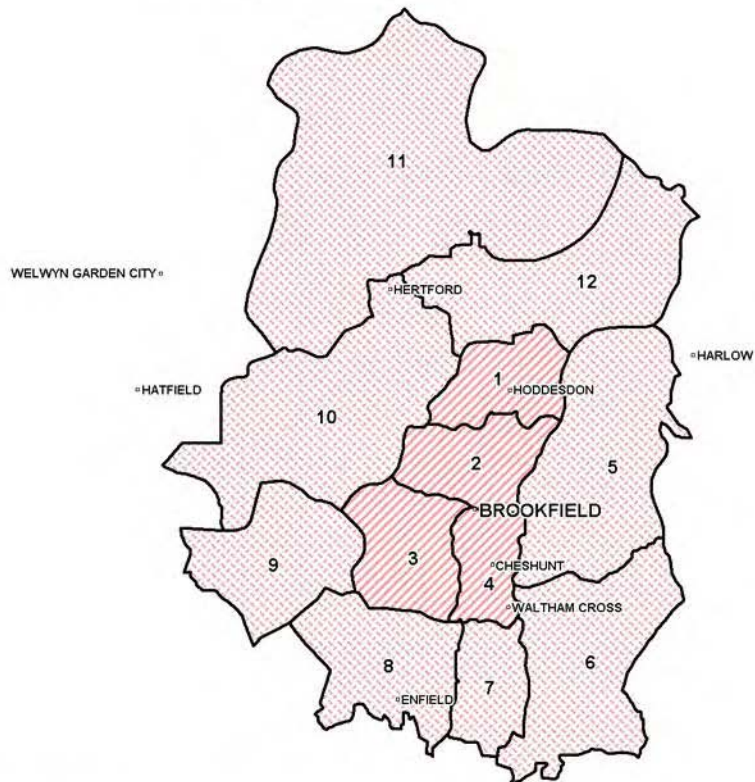
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Light red with diagonal lines	10 - 19.9
Light red with diagonal lines	20 - 29.9
Light red	30 - 39.9
Red	40 - 49.9
Dark red	50 - 59.9
Darkest red	60 - 69.9



• STEVENAGE

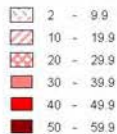
BROXBOURNE RETAIL STUDY

Brookfield Comparison Goods
Market Share



KEY

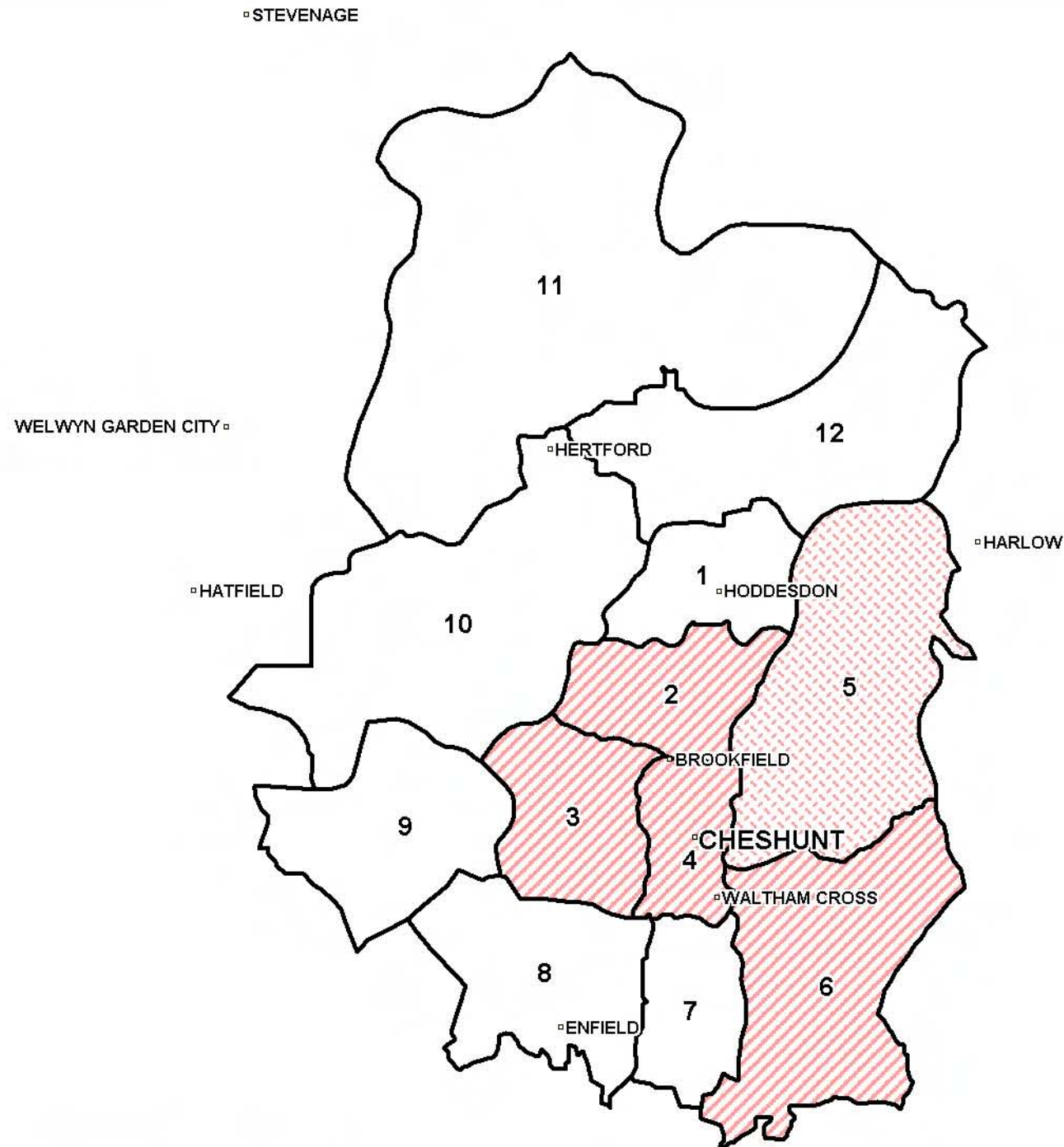
Comparison Goods
Market Share (%)



GVA Grimley
International Property Advisers

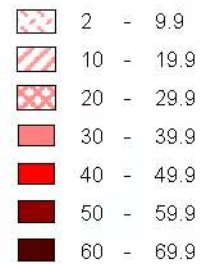
BROXBOURNE RETAIL STUDY

Cheshunt Convenience Goods Market Share

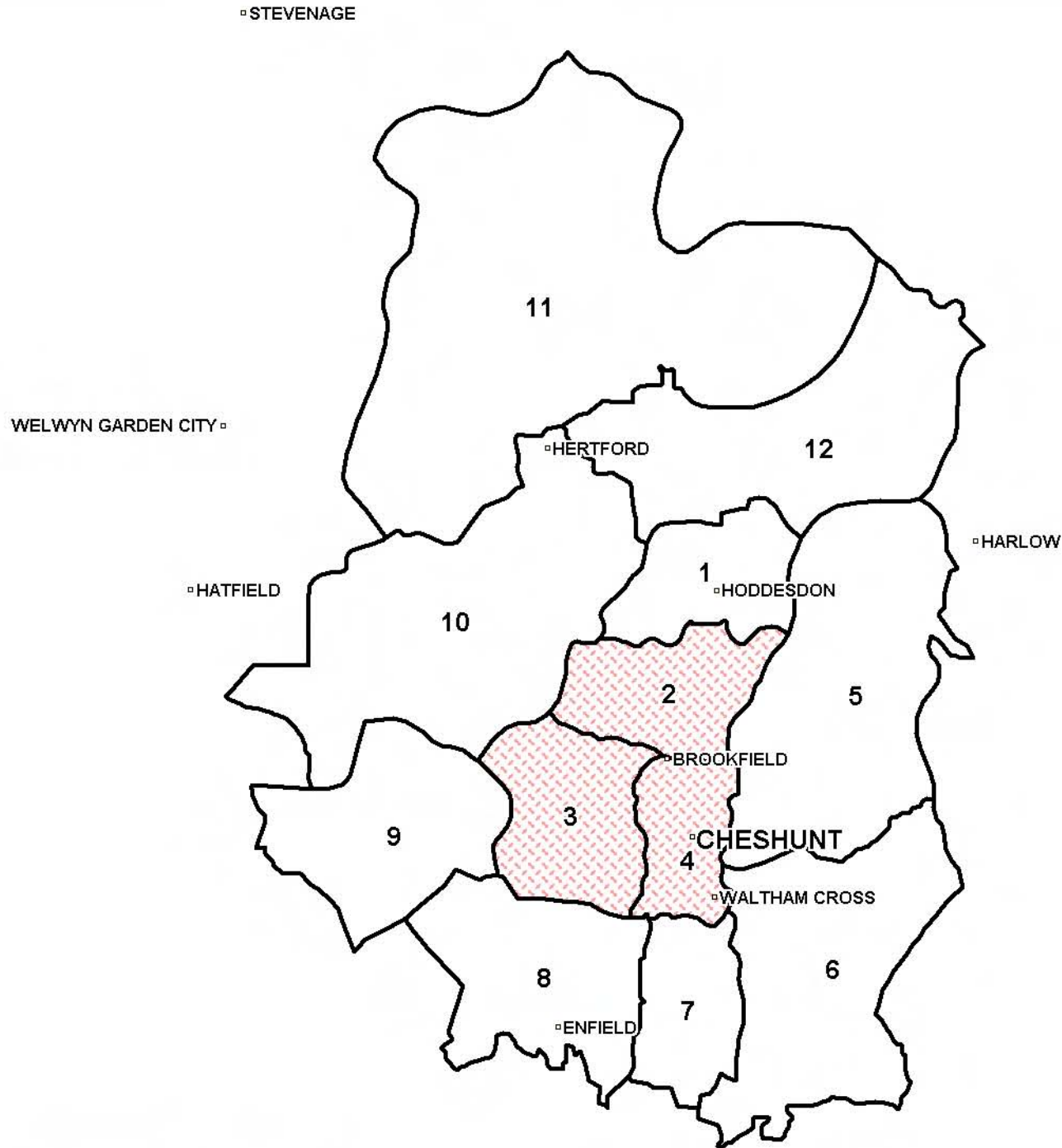


KEY

Convenience Goods Market Share (%)



BROXBOURNE RETAIL STUDY
Cheshunt Comparison Goods
Market Share



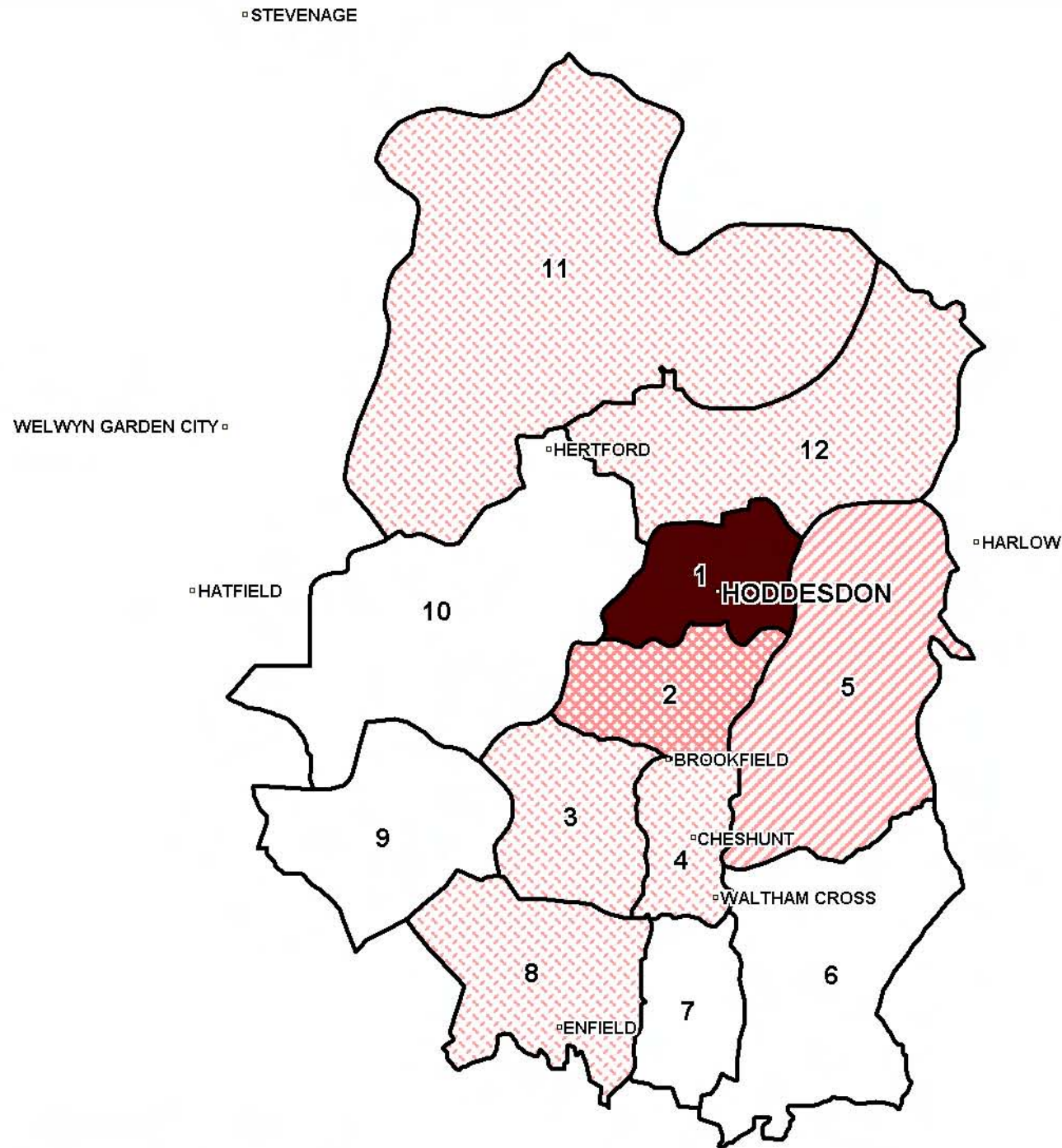
KEY

Comparison Goods Market Share (%)

[Cross-hatch pattern]	20 - 29.9
[Diagonal lines pattern]	10 - 19.9
[Dotted pattern]	2 - 9.9
[Light red solid]	30 - 39.9
[Red solid]	40 - 49.9
[Dark red solid]	50 - 59.9



BROXBOURNE RETAIL STUDY
Hoddesdon Convenience
Goods Market Share



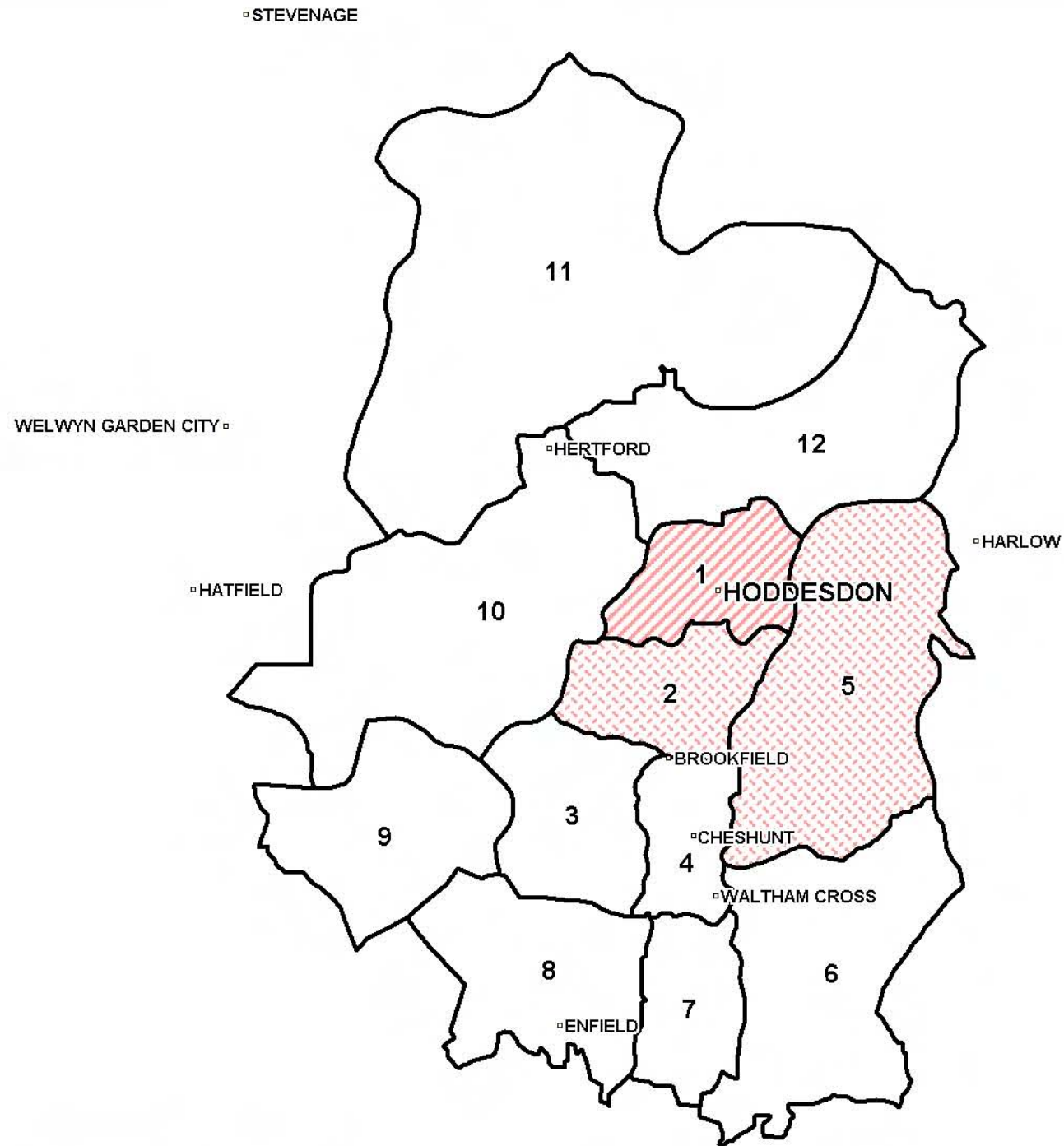
KEY

Convenience Goods Market Share (%)

	2 - 9.9
	10 - 19.9
	20 - 29.9
	30 - 39.9
	40 - 49.9
	50 - 59.9
	60 - 69.9



BROXBOURNE RETAIL STUDY
Hoddesdon Comparison Goods
Market Share



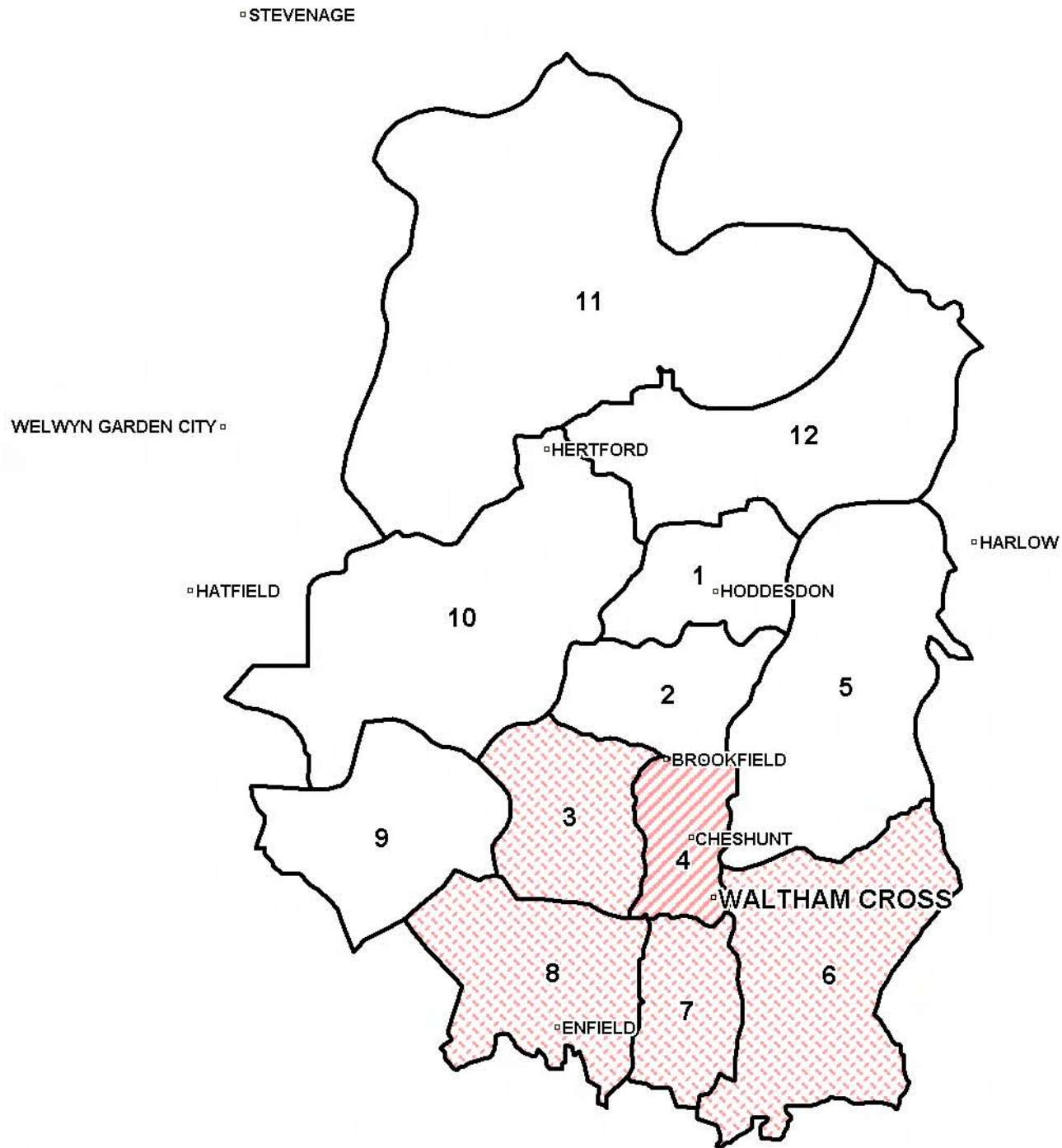
KEY

Comparison Goods Market Share (%)

	2 - 9.9
	10 - 19.9
	20 - 29.9
	30 - 39.9
	40 - 49.9
	50 - 59.9



BROXBOURNE RETAIL STUDY
Waltham Cross Convenience
Goods Market Share



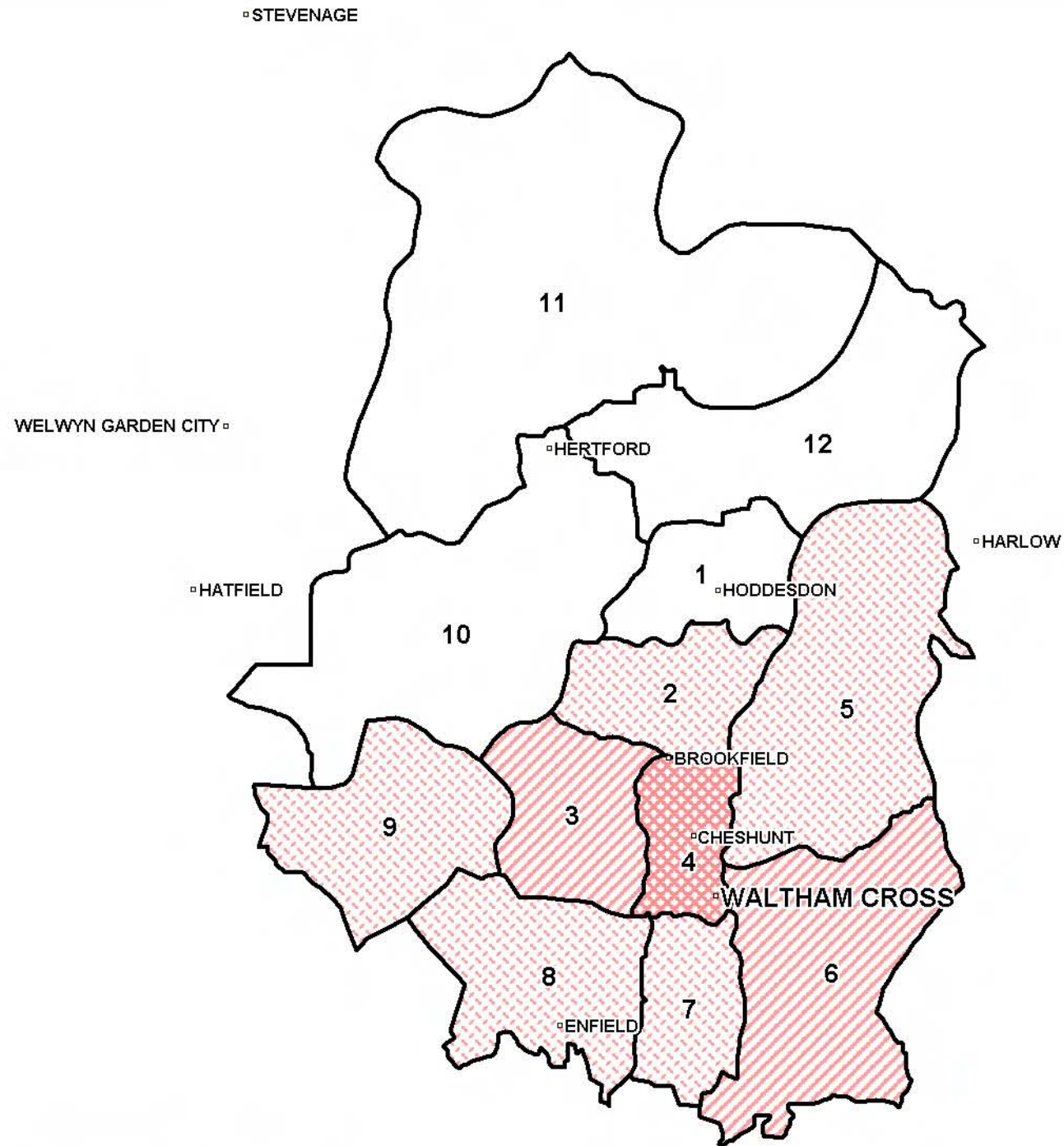
KEY

Convenience Goods Market Share (%)

	2 - 9.9
	10 - 19.9
	20 - 29.9
	30 - 39.9
	40 - 49.9
	50 - 59.9
	60 - 69.9









BROXBOURNE RETAIL STUDY
Waltham Cross Comparison
Goods Market Share



KEY

Comparison Goods Market Share (%)

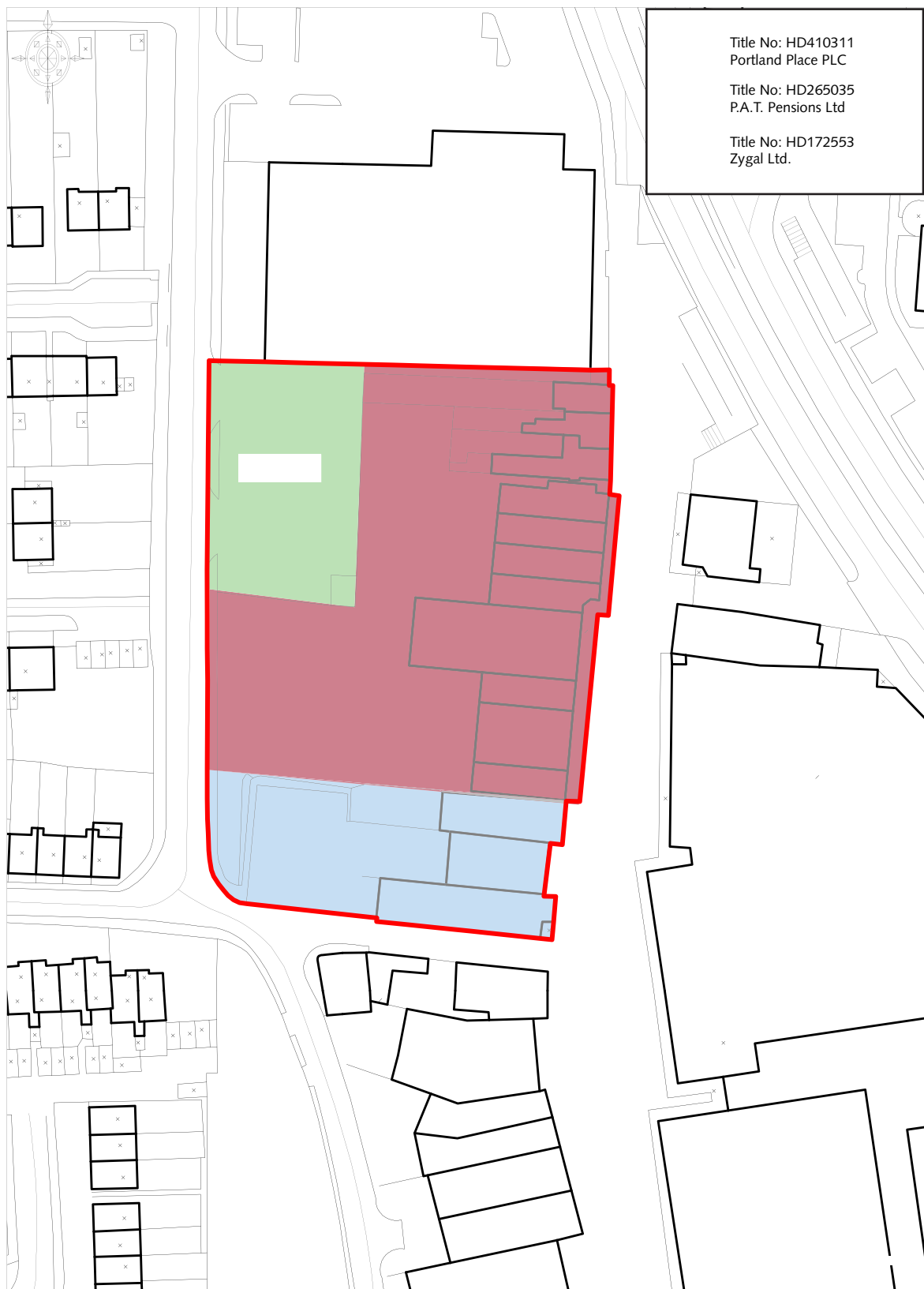
-  2 - 9.9
-  10 - 19.9
-  20 - 29.9
-  30 - 39.9
-  40 - 49.9
-  50 - 59.9



APPENDIX 4


STURLAS WAY LAND OWNERSHIP PLAN

Sturlas Way Development Opportunity Site: Extent of Land Ownership



APPENDIX 5

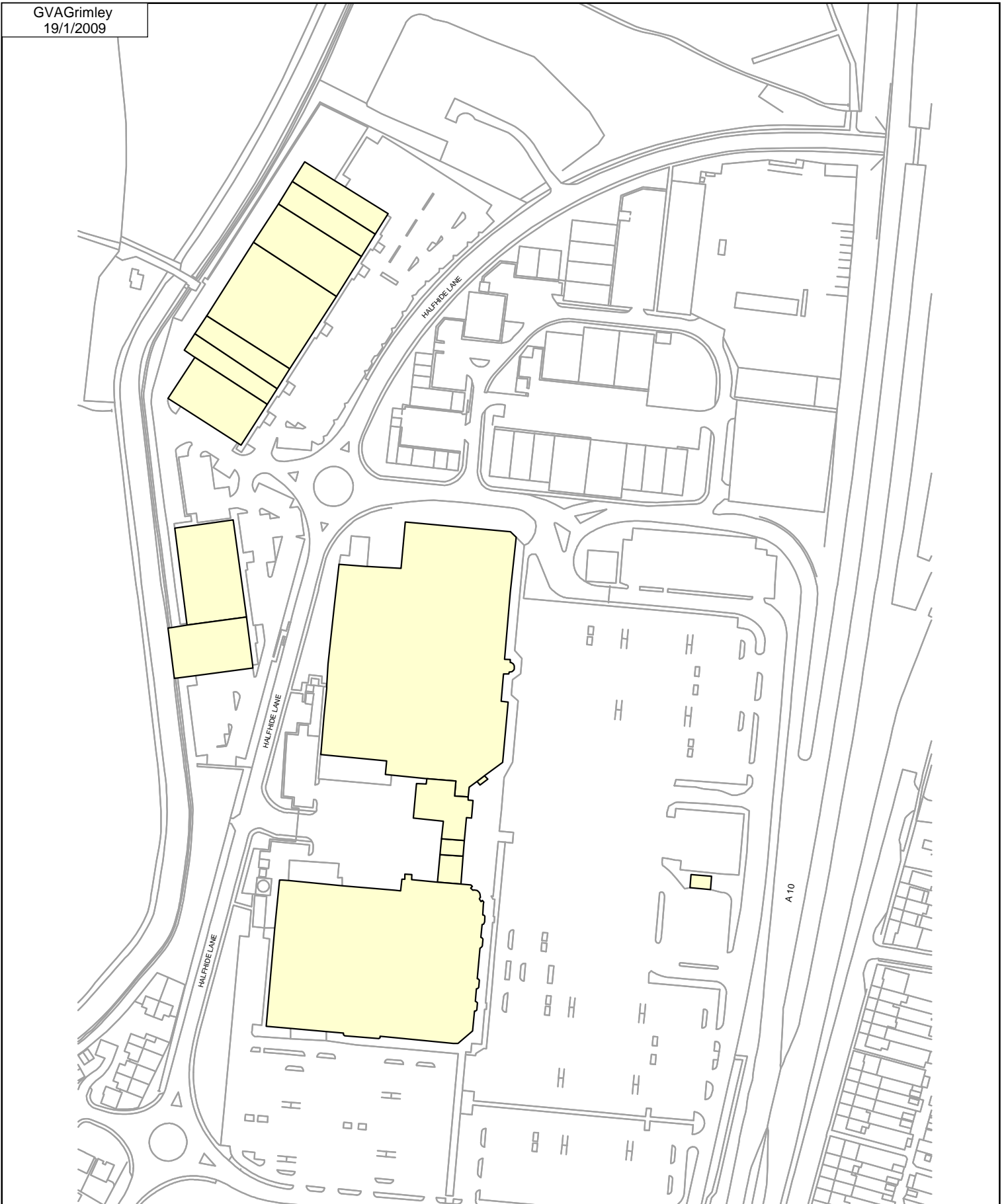
STURLAS WAY SITE APPRAISAL

SITE OFF STURLAS WAY, WALTHAM CROSS	
	
Site Location & Surrounding Area	<p>The site is situated towards the north of High Street bounded High Street to the east, Wickes to the north, Sturlas Way to the west and Park Lane to the south.</p> <p>The site is situated within the town centre boundary as defined in the Broxbourne Local Plan 2001-2011.</p>
Approximate Size	9.85 acres (3.99 hectares)
Site Allocations	Allocated within the boundaries of the Waltham Cross town centre. No other allocations.
SUITABILITY:	
Existing Uses	The east of the site comprises 14 retail units fronting High Street. To the rear of the units is a car park and two service areas occupying the remainder of the site area.
Planning History	None relevant.
Relationship with Town Centre	The site is situated within the town centre boundary with extensive frontage onto the High Street and in close proximity to the Pavilion shopping centre.
Access & Servicing Arrangements	Vehicular access to the site is situated off Sturlas Way.
Site Details	The site is part-occupied by retail units, including three vacant units. The shop units vary in size between 60 sqm and 390 sqm gross and the largest unit, a former McDonalds outlet is vacant. The majority of units are A1 retail units, although there are also units operating within A2, A3, A5, D1 and B1 use categories. The western portion of the site comprises two service areas and a surface car park providing 50 spaces.
Opportunities for Comparable Development	Suitable for retail-led development scheme.
AVAILABILITY:	
Land Ownership	The site is divided into three separate land-ownerships illustrated on Plan X.
Land Assembly / CPO Requirements	The Council may wish to communicate with the three landowners over future potential for the site. CPO requirements would require further investigation on the extent of leasehold arrangements with retailers and the car park operator.
VIABILITY:	
Potential for Redevelopment	Redevelopment potential for retail-led scheme, possibly a new foodstore.
Other Viability Issues	Land assembly, funding, planning permission.

APPENDIX 6

BROOKFIELD EXISTING RED LINE/SITE PLAN

GVAGrimley
19/1/2009



100 metres

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GVA Grimley
International Property Advisers

APPENDIX 7

CAPACITY FORECASTS: BASE

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

NEED: BASE SCENARIO

TABLE 1
SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	2009	2013	2018	2023	2026
1	EN11 0/8/9	20,526	21,208	21,811	22,555	22,940
2	EN 10 6/7	15,909	16,343	16,909	17,415	17,680
3	EN 7 5/6	21,428	22,109	22,960	23,774	24,250
4	EN 8 0/7/8/9	33,255	34,038	35,008	35,957	36,533
5	CM 19 5, EN 9 2	13,734	14,377	15,149	15,660	15,952
6	EN 9 1/2, 1G 10 4, E4 7	31,655	31,744	31,935	32,402	32,708
7	EN 3 4/5/6/7	48,538	50,435	52,501	54,535	55,905
8	EN 2 8/9, EN1 1/3/4, EN 2 0/6/7	67,715	68,789	70,093	71,398	72,422
9	EN 6 1/4/5	15,450	15,547	15,802	16,127	16,285
10	SG 13 8, AL 9 6, SG 14 1	10,043	10,371	10,883	11,324	11,539
11	SG 14 2/3, SG 12 0/7	34,547	35,903	37,399	38,869	39,643
12	SG 13 7, SG 12 8/9	22,112	23,167	24,504	25,814	26,453
TOTAL		334,912	344,031	354,954	365,830	372,310

SOURCE: Experian Business Solutions, September 2009

TABLE 1A
POPULATION GROWTH RATES

2009-2013 (%)	2009-2018 (%)	2009-2023 (%)	2009-2026 (%)
3.3	6.3	9.9	11.8
2.7	6.3	9.5	11.1
3.2	7.1	10.9	13.2
2.4	5.3	8.1	9.9
4.7	10.3	14.0	16.1
0.3	0.9	2.4	3.3
3.9	8.2	12.4	15.2
1.6	3.5	5.4	7.0
0.6	2.3	4.4	5.4
3.3	8.4	12.8	14.9
3.9	8.3	12.5	14.8
4.8	10.8	16.7	19.6
2.7	6.0	9.2	11.2

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

NEED: BASE SCENARIO

TABLE 2
COMPARISON GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2007 PRICES)

GROWTH IN PER CAPITA RETAIL EXPENDITURE: 3.80 %pa 2007-2026												
ZONE	2007		2009		2013		2018		2023		2026	
		Minus SFT at 6.2%		Minus SFT at 6.3%		Minus SFT at 8%		Minus SFT at 8.5%		Minus SFT at 8.5%		Minus SFT at 8.5%
1	3,112	2,919	3,353	3,142	3,892	3,581	4,690	4,292	5,652	5,172	6,321	5,784
2	3,286	3,082	3,540	3,317	4,110	3,781	4,953	4,532	5,968	5,461	6,674	6,107
3	3,192	2,994	3,439	3,223	3,993	3,673	4,811	4,402	5,797	5,304	6,484	5,932
4	2,878	2,700	3,101	2,906	3,600	3,312	4,338	3,969	5,227	4,783	5,846	5,349
5	3,256	3,054	3,508	3,287	4,073	3,747	4,907	4,490	5,913	5,411	6,614	6,051
6	3,217	3,018	3,466	3,248	4,024	3,702	4,849	4,437	5,843	5,346	6,534	5,979
7	2,492	2,337	2,685	2,516	3,117	2,868	3,756	3,437	4,526	4,141	5,062	4,631
8	1,747	1,639	1,882	1,764	2,185	2,010	2,633	2,409	3,173	2,903	3,548	3,247
9	3,582	3,360	3,859	3,616	4,480	4,122	5,399	4,940	6,506	5,953	7,276	6,657
10	3,399	3,188	3,662	3,432	4,251	3,911	5,123	4,688	6,173	5,648	6,904	6,317
11	3,314	3,109	3,571	3,346	4,145	3,814	4,995	4,570	6,019	5,507	6,731	6,159
12	3,356	3,148	3,616	3,388	4,198	3,862	5,058	4,628	6,095	5,577	6,817	6,237

Source: Experian Business Strategies and Expenditure Data for Broxbourne, September 2009

TABLE 3
SURVEY AREA COMPARISON GOODS RETAIL EXPENDITURE FORECASTS

ZONE	2009 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	64,488	75,947	93,607	116,644	132,679
2	52,777	61,798	76,626	95,098	107,974
3	69,052	81,209	101,071	126,108	143,862
4	96,623	112,727	138,947	171,970	195,410
5	45,146	53,867	68,024	84,733	96,532
6	102,808	117,513	141,680	173,221	195,558
7	122,114	144,628	180,430	225,841	258,922
8	119,430	138,288	168,873	207,280	235,144
9	55,871	64,083	78,060	95,997	108,414
10	34,463	40,564	51,014	63,963	72,894
11	115,584	136,916	170,925	214,060	244,169
12	74,918	89,467	113,410	143,965	164,994
TOTAL	953,273	1,117,007	1,382,667	1,718,880	1,956,552

Source: Tables 1&2

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

NEED: BASE SCENARIO

**TABLE 4
COMPARISON GOODS MARKET SHARE (%)**

Catchment Zone	Hoddesdon Town Centre				
	2009 (%)	2013 (%)	2018 (%)	2023 (%)	2026 (%)
1	12.6	12.6	12.6	12.6	12.6
2	5.4	5.4	5.4	5.4	5.4
3	1.2	1.2	1.2	1.2	1.2
4	0.0	0.0	0.0	0.0	0.0
5	2.7	2.7	2.7	2.7	2.7
6	0.3	0.3	0.3	0.3	0.3
7	0.2	0.2	0.2	0.2	0.2
8	0.3	0.3	0.3	0.3	0.3
9	0.3	0.3	0.3	0.3	0.3
10	0.2	0.2	0.2	0.2	0.2
11	1.4	1.4	1.4	1.4	1.4
12	1.7	1.7	1.7	1.7	1.7

**TABLE 5
COMPARISON GOODS SPEND (£)**

Catchment Zone	Hoddesdon Town Centre				
	2009 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	8,154	9,603	11,836	14,749	16,777
2	2,843	3,328	4,127	5,122	5,816
3	796	936	1,164	1,453	1,657
4	0	0	0	0	0
5	1,200	1,432	1,808	2,252	2,565
6	332	380	458	560	632
7	202	239	298	373	428
8	386	447	546	670	760
9	174	200	244	300	338
10	70	83	104	130	148
11	1,673	1,982	2,474	3,098	3,534
12	1,285	1,534	1,945	2,469	2,830
Total	17,115	20,164	25,005	31,177	35,487

Source: Tables 3 & 4

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

NEED: BASE SCENARIO

**TABLE 6
COMPARISON GOODS MARKET SHARE (%)**

Catchment Zone	Waltham Cross Town Centre				
	2009 (%)	2013 (%)	2018 (%)	2023 (%)	2026 (%)
1	1.8	1.8	1.8	1.8	1.8
2	5.3	5.3	5.3	5.3	5.3
3	13.6	13.6	13.6	13.6	13.6
4	21.4	21.4	21.4	21.4	21.4
5	2.9	2.9	2.9	2.9	2.9
6	12.7	12.7	12.7	12.7	12.7
7	5.0	5.0	5.0	5.0	5.0
8	3.8	3.8	3.8	3.8	3.8
9	2.2	2.2	2.2	2.2	2.2
10	0.4	0.4	0.4	0.4	0.4
11	1.1	1.1	1.1	1.1	1.1
12	1.3	1.3	1.3	1.3	1.3

**TABLE 7
COMPARISON GOODS SPEND (£)**

Catchment Zone	Waltham Cross Town Centre				
	2009 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	1,186	1,397	1,722	2,146	2,441
2	2,820	3,302	4,094	5,081	5,769
3	9,373	11,023	13,720	17,118	19,528
4	20,642	24,082	29,684	36,738	41,746
5	1,309	1,562	1,973	2,457	2,799
6	13,061	14,929	18,000	22,007	24,845
7	6,145	7,278	9,080	11,365	13,030
8	4,581	5,305	6,478	7,951	9,020
9	1,254	1,438	1,752	2,155	2,433
10	149	175	221	276	315
11	1,232	1,459	1,822	2,281	2,602
12	982	1,173	1,487	1,887	2,163
Total	62,735	73,124	90,030	111,463	126,691

Source: Tables 3 & 6

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

NEED: BASE SCENARIO

**TABLE 8
COMPARISON GOODS MARKET SHARE (%)**

Catchment Zone	Cheshunt District Centre				
	2009 (%)	2013 (%)	2018 (%)	2023 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	2.6	2.6	2.6	2.6	2.6
3	3.7	3.7	3.7	3.7	3.7
4	4.0	4.0	4.0	4.0	4.0
5	0.2	0.2	0.2	0.2	0.2
6	0.7	0.7	0.7	0.7	0.7
7	0.0	0.0	0.0	0.0	0.0
8	0.0	0.0	0.0	0.0	0.0
9	0.4	0.4	0.4	0.4	0.4
10	0.0	0.0	0.0	0.0	0.0
11	0.0	0.0	0.0	0.0	0.0
12	0.9	0.9	0.9	0.9	0.9

**TABLE 9
COMPARISON GOODS SPEND (£)**

Catchment Zone	Cheshunt District Centre				
	2009 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	0	0	0	0	0
2	1,382	1,618	2,006	2,490	2,827
3	2,548	2,997	3,730	4,654	5,309
4	3,891	4,540	5,596	6,926	7,870
5	80	95	120	150	170
6	684	782	943	1,153	1,302
7	0	0	0	0	0
8	0	0	0	0	0
9	196	225	273	336	380
10	0	0	0	0	0
11	0	0	0	0	0
12	661	789	1,001	1,270	1,456
Total	9,442	11,046	13,669	16,979	19,313

Source: Tables 3 & 8

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

NEED: BASE SCENARIO

**TABLE 10
COMPARISON GOODS MARKET SHARE (%)**

Catchment Zone	Brookfield Out of Town Centre				
	2009 (%)	2013 (%)	2018 (%)	2023 (%)	2026 (%)
1	10.4	10.4	10.4	10.4	10.4
2	18.3	18.3	18.3	18.3	18.3
3	18.4	18.4	18.4	18.4	18.4
4	19.8	19.8	19.8	19.8	19.8
5	4.7	4.7	4.7	4.7	4.7
6	6.2	6.2	6.2	6.2	6.2
7	3.4	3.4	3.4	3.4	3.4
8	2.0	2.0	2.0	2.0	2.0
9	4.9	4.9	4.9	4.9	4.9
10	3.8	3.8	3.8	3.8	3.8
11	5.3	5.3	5.3	5.3	5.3
12	8.1	8.1	8.1	8.1	8.1

**TABLE 11
COMPARISON GOODS SPEND (£)**

Catchment Zone	Brookfield Out of Town Centre				
	2009 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	6,713	7,906	9,744	12,142	13,811
2	9,653	11,303	14,016	17,394	19,750
3	12,711	14,949	18,605	23,214	26,482
4	19,112	22,298	27,484	34,016	38,653
5	2,118	2,527	3,191	3,975	4,529
6	6,350	7,258	8,751	10,699	12,079
7	4,154	4,920	6,138	7,682	8,808
8	2,371	2,745	3,352	4,114	4,667
9	2,735	3,137	3,821	4,699	5,306
10	1,320	1,554	1,954	2,450	2,792
11	6,084	7,206	8,996	11,267	12,852
12	6,084	7,265	9,209	11,690	13,398
Total	79,404	93,068	115,261	143,343	163,126

Source: Tables 3 & 10

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

NEED: BASE SCENARIO

**TABLE 12
COMPARISON GOODS FLOORSPACE**

Hoddesdon Town Centre	8,798
Waltham Cross Town Centre	22,260
Cheshunt District Centre	4,459
TOTAL	35,517

Source: Experian Goad

**TABLE 13
COMPARISON GOODS RETAIL WAREHOUSE FLOORSPACE**

	Net Floorspace Sq m	Sales Density £ per sq m	Turnover 2009 £000s
BROOKFIELD CENTRE			
Argos	816	21,008	17,143
Boots	1,168	8,626	10,075
Clarks	384	10,143	3,895
Clinton Cards	464	2,782	1,291
JD Sports	440	5,388	2,371
Marks & Spencer	5,444	5,451	29,675
New Look	920	5,046	4,642
Next	848	6,248	5,298
Outfit	1,720	12,167	20,927
River Island	520	12,167	6,327
Tesco	3,261	5,000	16,305
TOTAL	15,985	7,379	117,949

Source: Experian Goad

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

NEED: BASE SCENARIO

TABLE 14

FUTURE SHOP FLOORSPACE CAPACITY: GLOBAL CAPACITY FORECASTS

GROWTH IN SALES PER SQ M	COMPARISON				
	GOODS	1.5	%pa '09-'26		
	COMPARISON GOODS				
	2009	2013	2018	2023	2026
Total Available Expenditure (£000)	953,273	1,117,007	1,382,667	1,718,880	1,956,552
Market Share from Survey Area (%)	18	18	18	18	18
Survey Area Residents Spending (£000)	168,696	197,401	243,965	302,962	344,617
Inflow to <i>Waltham Cross & Brookfield Centre</i> from Beyond Survey Area (5% Each) £000	7,481	8,747	10,805	13,411	15,254
Total Town Centre Turnover	176,177	206,148	254,770	316,373	359,870
Existing Shop Floorspace (sq m net)	51,502	51,502	51,502	51,502	51,502
Sales per sq m net £	3,421	3,631	3,911	4,214	4,406
Sales from Existing Floorspace (£000)	176,177	186,988	201,439	217,007	226,920
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	19,160	53,330	99,365	132,950
Sales per sq m net in new shops (£)	3,500	3,715	4,002	4,311	4,508
Capacity for new floorspace (sq m net)	0	5,158	13,326	23,048	29,492

**BROXBORNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009
NEED: BASE SCENARIO**

TABLE 15

FUTURE SHOP FLOORSPACE CAPACITY: HODDESDON TOWN CENTRE

GROWTH IN SALES PER SQ M	COMPARISON				
	GOODS	1.5	%pa '09-'26		
	COMPARISON GOODS				
	2009	2013	2018	2023	2026
Total Available Expenditure (£000)	953,273	1,117,007	1,382,667	1,718,880	1,956,552
Market Share from Survey Area (%)	2	2	2	2	2
Survey Area Residents Spending (£000)	17,115	20,164	25,005	31,177	35,487
Total Town Centre Turnover	17,115	20,164	25,005	31,177	35,487
Existing Shop Floorspace (sq m net)	8,798	8,798	8,798	8,798	8,798
Sales per sq m net £	1,945	2,065	2,224	2,396	2,506
Sales from Existing Floorspace (£000)	17,115	18,165	19,569	21,082	22,045
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	1,999	5,435	10,095	13,442
Sales per sq m net in new shops (£)	3,500	3,715	4,002	4,311	4,508
Capacity for new floorspace (sq m net)	0	538	1,358	2,342	2,982

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009
NEED: BASE SCENARIO**

TABLE 16

FUTURE SHOP FLOORSPACE CAPACITY: WALTHAM CROSS TOWN CENTRE

GROWTH IN SALES PER SQ M	COMPARISON				
	GOODS	1.5	%pa '09-'26		
	COMPARISON GOODS				
	2009	2013	2018	2023	2026
Total Available Expenditure (£000)	953,273	1,117,007	1,382,667	1,718,880	1,956,552
Market Share from Survey Area (%)	7	7	7	7	7
Survey Area Residents Spending (£000)	62,735	73,124	90,030	111,463	126,691
Inflow <i>to Waltham Cross Town Centre</i> from Beyond Survey Area (5%) £000	3,302	3,849	4,738	5,866	6,668
Total Town Centre Turnover	66,037	76,973	94,768	117,329	133,359
Existing Shop Floorspace (sq m net)	22,260	22,260	22,260	22,260	22,260
Sales per sq m net £	2,967	3,149	3,392	3,654	3,821
Sales from Existing Floorspace (£000)	66,037	70,089	75,506	81,341	85,057
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	6,884	19,263	35,988	48,302
Sales per sq m net in new shops (£)	3,500	3,715	4,002	4,311	4,508
Capacity for new floorspace (sq m net)	0	1,853	4,813	8,348	10,715

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009
NEED: BASE SCENARIO**

**TABLE 17
FUTURE SHOP FLOORSPACE CAPACITY: CHESHUNT DISTRICT CENTRE**

GROWTH IN SALES PER SQ M	COMPARISON				
	GOODS	1.5	%pa '09-'26		
	COMPARISON GOODS				
	2009	2013	2018	2023	2026
Total Available Expenditure (£000)	953,273	1,117,007	1,382,667	1,718,880	1,956,552
Market Share from Survey Area (%)	1	1	1	1	1
Survey Area Residents Spending (£000)	9,442	11,046	13,669	16,979	19,313
Total Town Centre Turnover	9,442	11,046	13,669	16,979	19,313
Existing Shop Floorspace (sq m net)	4,459	4,459	4,459	4,459	4,459
Sales per sq m net £	2,118	2,247	2,421	2,608	2,727
Sales from Existing Floorspace (£000)	9,442	10,022	10,796	11,630	12,162
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	1,024	2,873	5,348	7,152
Sales per sq m net in new shops (£)	3,500	3,715	4,002	4,311	4,508
Capacity for new floorspace (sq m net)	0	276	718	1,241	1,586

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009
BASE SCENARIO**

**TABLE 18
FUTURE SHOP FLOORSPACE CAPACITY: BROOKFIELD CENTRE**

GROWTH IN SALES PER SQ M	COMPARISON				
	GOODS	1.5	%pa '09-'26		
	COMPARISON GOODS				
	2009	2013	2018	2023	2026
Total Available Expenditure (£000)	953,273	1,117,007	1,382,667	1,718,880	1,956,552
Market Share from Survey Area (%)	8	8	8	8	8
Survey Area Residents Spending (£000)	79,404	93,068	115,261	143,343	163,126
Inflow to Brookfield Centre from Beyond Survey Area (5%) £000	4,179	4,898	6,066	7,544	8,586
Total Centre Turnover	83,583	97,966	121,328	150,888	171,712
Existing Shop Floorspace (sq m net)	15,985	15,985	15,985	15,985	15,985
Sales per sq m net £	5,229	5,550	5,979	6,441	6,735
Sales from Existing Floorspace (£000)	83,583	88,712	95,568	102,954	107,657
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	9,254	25,759	47,934	64,055
Sales per sq m net in new shops (£)	3,500	3,715	4,002	4,311	4,508
Capacity for new floorspace (sq m net)	0	2,491	6,437	11,119	14,209

APPENDIX 8

CAPACITY FORECASTS: TREND

BROXBORNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

NEED: TREND SCENARIO

TABLE 1
SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	2009	2013	2018	2023	2026
1	EN11 0/8/9	20,526	21,208	21,811	22,555	22,940
2	EN 10 6/7	15,909	16,343	16,909	17,415	17,680
3	EN 7 5/6	21,428	22,109	22,960	23,774	24,250
4	EN 8 0/7/8/9	33,255	34,038	35,008	35,957	36,533
5	CM 19 5, EN 9 2	13,734	14,377	15,149	15,660	15,952
6	EN 9 1/2, 1G 10 4, E4 7	31,655	31,744	31,935	32,402	32,708
7	EN 3 4/5/6/7	48,538	50,435	52,501	54,535	55,905
8	EN 2 8/9, EN1 1/3/4, EN 2 0/6/7	67,715	68,789	70,093	71,398	72,422
9	EN 6 1/4/5	15,450	15,547	15,802	16,127	16,285
10	SG 13 8, AL 9 6, SG 14 1	10,043	10,371	10,883	11,324	11,539
11	SG 14 2/3, SG 12 0/7	34,547	35,903	37,399	38,869	39,643
12	SG 13 7, SG 12 8/9	22,112	23,167	24,504	25,814	26,453
TOTAL		334,912	344,031	354,954	365,830	372,310

SOURCE: Experian Business Solutions, September 2009

TABLE 1A
POPULATION GROWTH RATES

2009-2013 (%)	2009-2018 (%)	2009-2023 (%)	2009-2026 (%)
3.3	6.3	9.9	11.8
2.7	6.3	9.5	11.1
3.2	7.1	10.9	13.2
2.4	5.3	8.1	9.9
4.7	10.3	14.0	16.1
0.3	0.9	2.4	3.3
3.9	8.2	12.4	15.2
1.6	3.5	5.4	7.0
0.6	2.3	4.4	5.4
3.3	8.4	12.8	14.9
3.9	8.3	12.5	14.8
4.8	10.8	16.7	19.6
2.7	6.0	9.2	11.2

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

NEED: TREND SCENARIO

TABLE 2
COMPARISON GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2007 PRICES)

GROWTH IN PER CAPITA RETAIL EXPENDITURE: 4.70 %pa 2007-2026												
ZONE	2007		2009		2013		2018		2023		2026	
	Minus SFT at 6.2%		Minus SFT at 6.3%		Minus SFT at 8%		Minus SFT at 8.5%		Minus SFT at 8.5%		Minus SFT at 8.5%	
1	3,112	2,919	3,411	3,196	4,099	3,771	5,158	4,719	6,489	5,938	7,448	6,815
2	3,286	3,082	3,602	3,375	4,329	3,982	5,446	4,983	6,852	6,270	7,864	7,196
3	3,192	2,994	3,499	3,279	4,205	3,868	5,290	4,841	6,656	6,090	7,639	6,990
4	2,878	2,700	3,155	2,956	3,791	3,488	4,770	4,364	6,001	5,491	6,888	6,302
5	3,256	3,054	3,569	3,344	4,289	3,946	5,396	4,938	6,789	6,212	7,792	7,130
6	3,217	3,018	3,527	3,304	4,238	3,899	5,332	4,878	6,708	6,138	7,699	7,045
7	2,492	2,337	2,732	2,560	3,283	3,020	4,130	3,779	5,196	4,755	5,964	5,457
8	1,747	1,639	1,915	1,794	2,301	2,117	2,895	2,649	3,643	3,333	4,181	3,826
9	3,582	3,360	3,927	3,679	4,719	4,341	5,937	5,432	7,469	6,834	8,573	7,844
10	3,399	3,188	3,726	3,491	4,477	4,119	5,633	5,154	7,088	6,485	8,135	7,443
11	3,314	3,109	3,633	3,404	4,365	4,016	5,492	5,026	6,910	6,323	7,931	7,257
12	3,356	3,148	3,679	3,447	4,421	4,067	5,562	5,089	6,998	6,403	8,032	7,349

Source: Experian Business Strategies and Expenditure Data for Broxbourne, September 2009

TABLE 3
SURVEY AREA COMPARISON GOODS RETAIL EXPENDITURE FORECASTS

ZONE	2009 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	65,611	79,985	102,932	133,922	156,330
2	53,696	65,083	84,260	109,184	127,221
3	70,255	85,526	111,140	144,788	169,505
4	98,306	118,720	152,789	197,443	230,242
5	45,932	56,731	74,800	97,285	113,739
6	104,599	123,760	155,795	198,880	230,416
7	124,240	152,317	198,404	259,293	305,075
8	121,510	145,640	185,696	237,984	277,058
9	56,844	67,490	85,837	110,217	127,738
10	35,063	42,721	56,096	73,438	85,887
11	117,597	144,195	187,952	245,767	287,692
12	76,222	94,224	124,708	165,289	194,404
TOTAL	969,876	1,176,391	1,520,408	1,973,489	2,305,306

Source: Tables 1&2

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

NEED: TREND SCENARIO

**TABLE 4
COMPARISON GOODS MARKET SHARE (%)**

Catchment Zone	Hoddesdon Town Centre				
	2009 (%)	2013 (%)	2018 (%)	2023 (%)	2026 (%)
1	12.6	12.6	12.6	12.6	12.6
2	5.4	5.4	5.4	5.4	5.4
3	1.2	1.2	1.2	1.2	1.2
4	0.0	0.0	0.0	0.0	0.0
5	2.7	2.7	2.7	2.7	2.7
6	0.3	0.3	0.3	0.3	0.3
7	0.2	0.2	0.2	0.2	0.2
8	0.3	0.3	0.3	0.3	0.3
9	0.3	0.3	0.3	0.3	0.3
10	0.2	0.2	0.2	0.2	0.2
11	1.4	1.4	1.4	1.4	1.4
12	1.7	1.7	1.7	1.7	1.7

**TABLE 5
COMPARISON GOODS SPEND (£)**

Catchment Zone	Hoddesdon Town Centre				
	2009 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	8,296	10,114	13,015	16,934	19,767
2	2,892	3,505	4,538	5,881	6,852
3	809	985	1,280	1,668	1,953
4	0	0	0	0	0
5	1,221	1,508	1,988	2,586	3,023
6	338	400	504	643	745
7	205	252	328	429	505
8	393	471	601	770	896
9	177	211	268	344	399
10	71	87	114	149	175
11	1,702	2,087	2,720	3,557	4,164
12	1,307	1,616	2,139	2,835	3,334
Total	17,413	21,236	27,495	35,795	41,812

Source: Tables 3 & 4

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

NEED: TREND SCENARIO

TABLE 6
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Waltham Cross Town Centre				
	2009 (%)	2013 (%)	2018 (%)	2023 (%)	2026 (%)
1	1.8	1.8	1.8	1.8	1.8
2	5.3	5.3	5.3	5.3	5.3
3	13.6	13.6	13.6	13.6	13.6
4	21.4	21.4	21.4	21.4	21.4
5	2.9	2.9	2.9	2.9	2.9
6	12.7	12.7	12.7	12.7	12.7
7	5.0	5.0	5.0	5.0	5.0
8	3.8	3.8	3.8	3.8	3.8
9	2.2	2.2	2.2	2.2	2.2
10	0.4	0.4	0.4	0.4	0.4
11	1.1	1.1	1.1	1.1	1.1
12	1.3	1.3	1.3	1.3	1.3

TABLE 7
COMPARISON GOODS SPEND (£)

Catchment Zone	Waltham Cross Town Centre				
	2009 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	1,207	1,471	1,894	2,464	2,876
2	2,869	3,477	4,502	5,833	6,797
3	9,537	11,610	15,086	19,654	23,009
4	21,001	25,362	32,641	42,180	49,187
5	1,332	1,645	2,169	2,821	3,298
6	13,289	15,723	19,793	25,267	29,273
7	6,252	7,665	9,984	13,048	15,352
8	4,661	5,587	7,123	9,129	10,628
9	1,276	1,515	1,927	2,474	2,867
10	152	185	242	317	371
11	1,253	1,537	2,003	2,619	3,066
12	999	1,235	1,635	2,167	2,548
Total	63,827	77,012	98,999	127,973	149,273

Source: Tables 3 & 6

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

NEED: TREND SCENARIO

**TABLE 8
COMPARISON GOODS MARKET SHARE (%)**

Catchment Zone	Cheshunt District Centre				
	2009 (%)	2013 (%)	2018 (%)	2023 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	2.6	2.6	2.6	2.6	2.6
3	3.7	3.7	3.7	3.7	3.7
4	4.0	4.0	4.0	4.0	4.0
5	0.2	0.2	0.2	0.2	0.2
6	0.7	0.7	0.7	0.7	0.7
7	0.0	0.0	0.0	0.0	0.0
8	0.0	0.0	0.0	0.0	0.0
9	0.4	0.4	0.4	0.4	0.4
10	0.0	0.0	0.0	0.0	0.0
11	0.0	0.0	0.0	0.0	0.0
12	0.9	0.9	0.9	0.9	0.9

**TABLE 9
COMPARISON GOODS SPEND (£)**

Catchment Zone	Cheshunt District Centre				
	2009 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	0	0	0	0	0
2	1,406	1,704	2,206	2,859	3,331
3	2,593	3,156	4,101	5,343	6,255
4	3,959	4,781	6,153	7,951	9,272
5	81	100	132	172	201
6	696	824	1,037	1,324	1,534
7	0	0	0	0	0
8	0	0	0	0	0
9	199	236	301	386	448
10	0	0	0	0	0
11	0	0	0	0	0
12	673	831	1,100	1,459	1,715
Total	9,607	11,633	15,031	19,493	22,756

Source: Tables 3 & 8

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

NEED: TREND SCENARIO

**TABLE 10
COMPARISON GOODS MARKET SHARE (%)**

Catchment Zone	Brookfield Out of Town Centre				
	2009 (%)	2013 (%)	2018 (%)	2023 (%)	2026 (%)
1	10.4	10.4	10.4	10.4	10.4
2	18.3	18.3	18.3	18.3	18.3
3	18.4	18.4	18.4	18.4	18.4
4	19.8	19.8	19.8	19.8	19.8
5	4.7	4.7	4.7	4.7	4.7
6	6.2	6.2	6.2	6.2	6.2
7	3.4	3.4	3.4	3.4	3.4
8	2.0	2.0	2.0	2.0	2.0
9	4.9	4.9	4.9	4.9	4.9
10	3.8	3.8	3.8	3.8	3.8
11	5.3	5.3	5.3	5.3	5.3
12	8.1	8.1	8.1	8.1	8.1

**TABLE 11
COMPARISON GOODS SPEND (£)**

Catchment Zone	Brookfield Out of Town Centre				
	2009 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	6,830	8,326	10,715	13,941	16,273
2	9,822	11,904	15,412	19,971	23,270
3	12,933	15,744	20,459	26,653	31,203
4	19,445	23,483	30,222	39,055	45,542
5	2,155	2,661	3,509	4,564	5,336
6	6,461	7,644	9,623	12,284	14,232
7	4,226	5,181	6,749	8,820	10,377
8	2,412	2,891	3,686	4,724	5,499
9	2,782	3,303	4,201	5,395	6,252
10	1,343	1,636	2,149	2,813	3,290
11	6,190	7,590	9,893	12,936	15,142
12	6,189	7,651	10,127	13,422	15,786
Total	80,787	98,015	126,744	164,576	192,203

Source: Tables 3 & 10

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

NEED: TREND SCENARIO

**TABLE 12
COMPARISON GOODS FLOORSPACE**

Hoddesdon Town Centre	8,798
Waltham Cross Town Centre	22,260
Cheshunt District Centre	4,459
TOTAL	35,517

Source: Experian Goad

**TABLE 13
COMPARISON GOODS RETAIL WAREHOUSE FLOORSPACE**

	Net Floorspace Sq m	Sales Density £ per sq m	Turnover 2009 £000s
BROOKFIELD CENTRE			
Argos	816	21,008	17,143
Boots	1,168	8,626	10,075
Clarks	384	10,143	3,895
Clinton Cards	464	2,782	1,291
JD Sports	440	5,388	2,371
Marks & Spencer	5,444	5,451	29,675
New Look	920	5,046	4,642
Next	848	6,248	5,298
Outfit	1,720	12,167	20,927
River Island	520	12,167	6,327
Tesco	3,261	5,000	16,305
TOTAL	15,985	7,379	117,949

Source: Experian Goad

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

NEED: TREND SCENARIO

TABLE 14

FUTURE SHOP FLOORSPACE CAPACITY: GLOBAL CAPACITY FORECASTS

GROWTH IN SALES PER SQ M	COMPARISON				
	GOODS	2	%pa '09-'26		
	COMPARISON GOODS				
	2009	2013	2018	2023	2026
Total Available Expenditure (£000)	969,876	1,176,391	1,520,408	1,973,489	2,305,306
Market Share from Survey Area (%)	18	18	18	18	18
Survey Area Residents Spending (£000)	171,634	207,896	268,269	347,838	406,045
Inflow to <i>Waltham Cross & Brookfield Centre</i> from Beyond Survey Area (5% Each) £000	7,611	9,212	11,881	15,397	17,972
Total Town Centre Turnover	179,246	217,108	280,150	363,235	424,017
Existing Shop Floorspace (sq m net)	51,502	51,502	51,502	51,502	51,502
Sales per sq m net £	3,480	3,767	4,159	4,592	4,873
Sales from Existing Floorspace (£000)	179,246	194,021	214,215	236,511	250,987
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	23,087	65,935	126,725	173,030
Sales per sq m net in new shops (£)	3,500	3,789	4,183	4,618	4,901
Capacity for new floorspace (sq m net)	0	6,094	15,763	27,440	35,306

**BROXBORNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009
NEED: TREND SCENARIO**

**TABLE 15
FUTURE SHOP FLOORSPACE CAPACITY: HODDESDON TOWN CENTRE**

GROWTH IN SALES PER SQ M	COMPARISON				
	GOODS	2	%pa '09-'26		
	COMPARISON GOODS				
	2009	2013	2018	2023	2026
Total Available Expenditure (£000)	969,876	1,176,391	1,520,408	1,973,489	2,305,306
Market Share from Survey Area (%)	2	2	2	2	2
Survey Area Residents Spending (£000)	17,413	21,236	27,495	35,795	41,812
Total Town Centre Turnover	17,413	21,236	27,495	35,795	41,812
Existing Shop Floorspace (sq m net)	8,798	8,798	8,798	8,798	8,798
Sales per sq m net £	1,979	2,142	2,365	2,612	2,771
Sales from Existing Floorspace (£000)	17,413	18,849	20,810	22,976	24,383
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	2,387	6,685	12,819	17,429
Sales per sq m net in new shops (£)	3,500	3,789	4,183	4,618	4,901
Capacity for new floorspace (sq m net)	0	630	1,598	2,776	3,556

**BROXBORNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009
NEED: TREND SCENARIO**

TABLE 16

FUTURE SHOP FLOORSPACE CAPACITY: WALTHAM CROSS TOWN CENTRE

GROWTH IN SALES PER SQ M	COMPARISON				
	GOODS	2	%pa '09-'26		
	COMPARISON GOODS				
	2009	2013	2018	2023	2026
Total Available Expenditure (£000)	969,876	1,176,391	1,520,408	1,973,489	2,305,306
Market Share from Survey Area (%)	7	7	7	7	7
Survey Area Residents Spending (£000)	63,827	77,012	98,999	127,973	149,273
Inflow <i>to Waltham Cross Town Centre</i> from Beyond Survey Area (5%) £000	3,359	4,053	5,210	6,735	7,856
Total Town Centre Turnover	67,187	81,065	104,209	134,709	157,130
Existing Shop Floorspace (sq m net)	22,260	22,260	22,260	22,260	22,260
Sales per sq m net £	3,018	3,267	3,607	3,983	4,226
Sales from Existing Floorspace (£000)	67,187	72,725	80,294	88,652	94,078
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	8,340	23,915	46,057	63,052
Sales per sq m net in new shops (£)	3,500	3,789	4,183	4,618	4,901
Capacity for new floorspace (sq m net)	0	2,201	5,717	9,973	12,866

**BROXBORNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009
NEED: TREND SCENARIO**

TABLE 17

FUTURE SHOP FLOORSPACE CAPACITY: CHESHUNT DISTRICT CENTRE

GROWTH IN SALES PER SQ M	COMPARISON				
	GOODS	2	%pa '09-'26		
	COMPARISON GOODS				
	2009	2013	2018	2023	2026
Total Available Expenditure (£000)	969,876	1,176,391	1,520,408	1,973,489	2,305,306
Market Share from Survey Area (%)	1	1	1	1	1
Survey Area Residents Spending (£000)	9,607	11,633	15,031	19,493	22,756
Total Town Centre Turnover	9,607	11,633	15,031	19,493	22,756
Existing Shop Floorspace (sq m net)	4,459	4,459	4,459	4,459	4,459
Sales per sq m net £	2,154	2,332	2,575	2,843	3,017
Sales from Existing Floorspace (£000)	9,607	10,398	11,481	12,676	13,452
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	1,235	3,550	6,818	9,304
Sales per sq m net in new shops (£)	3,500	3,789	4,183	4,618	4,901
Capacity for new floorspace (sq m net)	0	326	849	1,476	1,899

**BROXBORNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009
NEED: TREND SCENARIO**

**TABLE 18
FUTURE SHOP FLOORSPACE CAPACITY: BROOKFIELD CENTRE**

GROWTH IN SALES PER SQ M	COMPARISON				
	GOODS	2	%pa '09-'26		
	COMPARISON GOODS				
	2009	2013	2018	2023	2026
Total Available Expenditure (£000)	969,876	1,176,391	1,520,408	1,973,489	2,305,306
Market Share from Survey Area (%)	8	8	8	8	8
Survey Area Residents Spending (£000)	80,787	98,015	126,744	164,576	192,203
Inflow <i>to Brookfield Centre</i> from Beyond Survey Area (5%) £000	4,252	5,159	6,671	8,662	10,116
Total Centre Turnover	85,039	103,174	133,414	173,238	202,319
Existing Shop Floorspace (sq m net)	15,985	15,985	15,985	15,985	15,985
Sales per sq m net £	5,320	5,758	6,358	7,020	7,449
Sales from Existing Floorspace (£000)	85,039	92,049	101,630	112,207	119,075
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	11,125	31,785	61,031	83,244
Sales per sq m net in new shops (£)	3,500	3,789	4,183	4,618	4,901
Capacity for new floorspace (sq m net)	0	2,937	7,599	13,215	16,986

APPENDIX 9

CAPACITY FORECASTS: CAUTIOUS

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

NEED: CAUTIOUS GROWTH SCENARIO

TABLE 1
SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	2009	2013	2018	2023	2026
1	EN11 0/8/9	20,526	21,208	21,811	22,555	22,940
2	EN 10 6/7	15,909	16,343	16,909	17,415	17,680
3	EN 7 5/6	21,428	22,109	22,960	23,774	24,250
4	EN 8 0/7/8/9	33,255	34,038	35,008	35,957	36,533
5	CM 19 5, EN 9 2	13,734	14,377	15,149	15,660	15,952
6	EN 9 1/2, 1G 10 4, E4 7	31,655	31,744	31,935	32,402	32,708
7	EN 3 4/5/6/7	48,538	50,435	52,501	54,535	55,905
8	EN 2 8/9, EN1 1/3/4, EN 2 0/6/7	67,715	68,789	70,093	71,398	72,422
9	EN 6 1/4/5	15,450	15,547	15,802	16,127	16,285
10	SG 13 8, AL 9 6, SG 14 1	10,043	10,371	10,883	11,324	11,539
11	SG 14 2/3, SG 12 0/7	34,547	35,903	37,399	38,869	39,643
12	SG 13 7, SG 12 8/9	22,112	23,167	24,504	25,814	26,453
TOTAL		334,912	344,031	354,954	365,830	372,310

SOURCE: Experian Business Solutions, September 2009

TABLE 1A
POPULATION GROWTH RATES

2009-2013 (%)	2009-2018 (%)	2009-2023 (%)	2009-2026 (%)
3.3	6.3	9.9	11.8
2.7	6.3	9.5	11.1
3.2	7.1	10.9	13.2
2.4	5.3	8.1	9.9
4.7	10.3	14.0	16.1
0.3	0.9	2.4	3.3
3.9	8.2	12.4	15.2
1.6	3.5	5.4	7.0
0.6	2.3	4.4	5.4
3.3	8.4	12.8	14.9
3.9	8.3	12.5	14.8
4.8	10.8	16.7	19.6
2.7	6.0	9.2	11.2

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

NEED: CAUTIOUS GROWTH SCENARIO

TABLE 2
COMPARISON GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2007 PRICES)

GROWTH IN PER CAPITA RETAIL EXPENDITURE:														
3.8% pa 2007-2008 1.1% pa 2008-2009 1.5% pa 2009-2013 2.8% pa 2013-2018 4.7% pa 2018-2026														
2007		2008		2009		2013		2018		2023		2026		
Minus SFT at 6.2%		Minus SFT at 6.3%		Minus SFT at 6.5%		Minus SFT at 8%		Minus SFT at 8.5%		Minus SFT at 8.5%		Minus SFT at 8.5%		
ZONE														
1	3,112	2,919	3,230	3,027	3,266	3,054	3,466	3,189	3,979	3,641	5,007	4,581	5,746	5,258
2	3,286	3,082	3,411	3,196	3,448	3,224	3,660	3,367	4,202	3,845	5,287	4,837	6,068	5,552
3	3,192	2,994	3,313	3,105	3,350	3,132	3,555	3,271	4,082	3,735	5,135	4,699	5,894	5,393
4	2,878	2,700	2,987	2,799	3,020	2,824	3,206	2,949	3,680	3,367	4,630	4,237	5,314	4,863
5	3,256	3,054	3,380	3,167	3,417	3,195	3,627	3,336	4,164	3,810	5,238	4,793	6,012	5,501
6	3,217	3,018	3,339	3,129	3,376	3,157	3,583	3,296	4,114	3,764	5,176	4,736	5,940	5,435
7	2,492	2,337	2,587	2,424	2,615	2,445	2,776	2,554	3,187	2,916	4,009	3,668	4,602	4,210
8	1,747	1,639	1,813	1,699	1,833	1,714	1,946	1,790	2,234	2,044	2,811	2,572	3,226	2,952
9	3,582	3,360	3,718	3,484	3,759	3,515	3,990	3,671	4,580	4,191	5,763	5,273	6,614	6,052
10	3,399	3,188	3,528	3,306	3,567	3,335	3,786	3,483	4,346	3,977	5,468	5,004	6,276	5,743
11	3,314	3,109	3,440	3,223	3,478	3,252	3,691	3,396	4,238	3,878	5,332	4,878	6,119	5,599
12	3,356	3,148	3,484	3,264	3,522	3,293	3,738	3,439	4,291	3,927	5,399	4,940	6,197	5,670

Source: Experian Business Strategies and Expenditure Data for Broxbourne, September 2009

TABLE 3
SURVEY AREA COMPARISON GOODS RETAIL EXPENDITURE FORECASTS

ZONE	2009 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	62,676	67,630	79,417	103,327	120,616
2	51,294	55,030	65,011	84,241	98,157
3	67,113	72,316	85,750	111,712	130,782
4	93,909	100,382	117,885	152,338	177,643
5	43,877	47,968	57,712	75,060	87,755
6	99,920	104,644	120,204	153,446	177,778
7	118,683	128,790	153,079	200,058	235,381
8	116,075	123,144	143,274	183,617	213,765
9	54,302	57,065	66,227	85,038	98,557
10	33,495	36,122	43,281	56,661	66,266
11	112,337	121,922	145,015	189,622	221,969
12	72,813	79,670	96,218	127,529	149,993
TOTAL	926,495	994,682	1,173,073	1,522,648	1,778,662

Source: Tables 1&2

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

NEED: CAUTIOUS GROWTH SCENARIO

**TABLE 4
COMPARISON GOODS MARKET SHARE (%)**

Catchment Zone	Hoddesdon Town Centre				
	2009 (%)	2013 (%)	2018 (%)	2023 (%)	2026 (%)
1	12.6	12.6	12.6	12.6	12.6
2	5.4	5.4	5.4	5.4	5.4
3	1.2	1.2	1.2	1.2	1.2
4	0.0	0.0	0.0	0.0	0.0
5	2.7	2.7	2.7	2.7	2.7
6	0.3	0.3	0.3	0.3	0.3
7	0.2	0.2	0.2	0.2	0.2
8	0.3	0.3	0.3	0.3	0.3
9	0.3	0.3	0.3	0.3	0.3
10	0.2	0.2	0.2	0.2	0.2
11	1.4	1.4	1.4	1.4	1.4
12	1.7	1.7	1.7	1.7	1.7

**TABLE 5
COMPARISON GOODS SPEND (£)**

Catchment Zone	Hoddesdon Town Centre				
	2009 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	7,925	8,551	10,042	13,065	15,251
2	2,763	2,964	3,502	4,537	5,287
3	773	833	988	1,287	1,507
4	0	0	0	0	0
5	1,166	1,275	1,534	1,995	2,332
6	323	338	389	496	575
7	196	213	253	331	389
8	375	398	463	594	691
9	169	178	207	265	307
10	68	74	88	115	135
11	1,626	1,765	2,099	2,745	3,213
12	1,249	1,366	1,650	2,187	2,572
Total	16,634	17,956	21,214	27,618	32,260

Source: Tables 3 & 4

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

NEED: CAUTIOUS GROWTH SCENARIO

TABLE 6
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Waltham Cross Town Centre				
	2009 (%)	2013 (%)	2018 (%)	2023 (%)	2026 (%)
1	1.8	1.8	1.8	1.8	1.8
2	5.3	5.3	5.3	5.3	5.3
3	13.6	13.6	13.6	13.6	13.6
4	21.4	21.4	21.4	21.4	21.4
5	2.9	2.9	2.9	2.9	2.9
6	12.7	12.7	12.7	12.7	12.7
7	5.0	5.0	5.0	5.0	5.0
8	3.8	3.8	3.8	3.8	3.8
9	2.2	2.2	2.2	2.2	2.2
10	0.4	0.4	0.4	0.4	0.4
11	1.1	1.1	1.1	1.1	1.1
12	1.3	1.3	1.3	1.3	1.3

TABLE 7
COMPARISON GOODS SPEND (£)

Catchment Zone	Waltham Cross Town Centre				
	2009 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	1,153	1,244	1,461	1,901	2,219
2	2,741	2,940	3,473	4,501	5,244
3	9,110	9,816	11,640	15,164	17,753
4	20,062	21,445	25,184	32,544	37,950
5	1,272	1,391	1,674	2,177	2,545
6	12,694	13,294	15,271	19,494	22,586
7	5,972	6,481	7,703	10,068	11,845
8	4,452	4,724	5,496	7,043	8,200
9	1,219	1,281	1,486	1,909	2,212
10	145	156	187	245	286
11	1,197	1,299	1,546	2,021	2,366
12	955	1,044	1,261	1,672	1,966
Total	60,973	65,116	76,383	98,738	115,172

Source: Tables 3 & 6

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

NEED: CAUTIOUS GROWTH SCENARIO

**TABLE 8
COMPARISON GOODS MARKET SHARE (%)**

Catchment Zone	Cheshunt District Centre				
	2009 (%)	2013 (%)	2018 (%)	2023 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	2.6	2.6	2.6	2.6	2.6
3	3.7	3.7	3.7	3.7	3.7
4	4.0	4.0	4.0	4.0	4.0
5	0.2	0.2	0.2	0.2	0.2
6	0.7	0.7	0.7	0.7	0.7
7	0.0	0.0	0.0	0.0	0.0
8	0.0	0.0	0.0	0.0	0.0
9	0.4	0.4	0.4	0.4	0.4
10	0.0	0.0	0.0	0.0	0.0
11	0.0	0.0	0.0	0.0	0.0
12	0.9	0.9	0.9	0.9	0.9

**TABLE 9
COMPARISON GOODS SPEND (£)**

Catchment Zone	Cheshunt District Centre				
	2009 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	0	0	0	0	0
2	1,343	1,441	1,702	2,206	2,570
3	2,477	2,669	3,164	4,123	4,826
4	3,782	4,043	4,747	6,135	7,154
5	77	85	102	132	155
6	665	697	800	1,021	1,183
7	0	0	0	0	0
8	0	0	0	0	0
9	190	200	232	298	345
10	0	0	0	0	0
11	0	0	0	0	0
12	643	703	849	1,125	1,324
Total	9,177	9,836	11,597	15,040	17,557

Source: Tables 3 & 8

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

NEED: CAUTIOUS GROWTH SCENARIO

**TABLE 10
COMPARISON GOODS MARKET SHARE (%)**

Catchment Zone	Brookfield Out of Town Centre				
	2009 (%)	2013 (%)	2018 (%)	2023 (%)	2026 (%)
1	10.4	10.4	10.4	10.4	10.4
2	18.3	18.3	18.3	18.3	18.3
3	18.4	18.4	18.4	18.4	18.4
4	19.8	19.8	19.8	19.8	19.8
5	4.7	4.7	4.7	4.7	4.7
6	6.2	6.2	6.2	6.2	6.2
7	3.4	3.4	3.4	3.4	3.4
8	2.0	2.0	2.0	2.0	2.0
9	4.9	4.9	4.9	4.9	4.9
10	3.8	3.8	3.8	3.8	3.8
11	5.3	5.3	5.3	5.3	5.3
12	8.1	8.1	8.1	8.1	8.1

**TABLE 11
COMPARISON GOODS SPEND (£)**

Catchment Zone	Brookfield Out of Town Centre				
	2009 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	6,524	7,040	8,267	10,756	12,556
2	9,382	10,066	11,891	15,409	17,954
3	12,354	13,312	15,785	20,564	24,074
4	18,575	19,856	23,318	30,133	35,138
5	2,058	2,250	2,707	3,521	4,117
6	6,172	6,463	7,424	9,478	10,981
7	4,037	4,381	5,207	6,805	8,007
8	2,304	2,444	2,844	3,645	4,243
9	2,658	2,793	3,242	4,162	4,824
10	1,283	1,384	1,658	2,170	2,538
11	5,913	6,417	7,633	9,981	11,683
12	5,913	6,469	7,813	10,356	12,180
Total	77,174	82,876	97,789	126,979	148,295

Source: Tables 3 & 10

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

NEED: CAUTIOUS GROWTH SCENARIO

**TABLE 12
COMPARISON GOODS FLOORSPACE**

Hoddesdon Town Centre	8,798
Waltham Cross Town Centre	22,260
Cheshunt District Centre	4,459
TOTAL	35,517

Source: Experian Goad

**TABLE 13
COMPARISON GOODS RETAIL WAREHOUSE FLOORSPACE**

	Net Floorspace Sq m	Sales Density £ per sq m	Turnover 2009 £000s
BROOKFIELD CENTRE			
Argos	816	21,008	17,143
Boots	1,168	8,626	10,075
Clarks	384	10,143	3,895
Clinton Cards	464	2,782	1,291
JD Sports	440	5,388	2,371
Marks & Spencer	5,444	5,451	29,675
New Look	920	5,046	4,642
Next	848	6,248	5,298
Outfit	1,720	12,167	20,927
River Island	520	12,167	6,327
Tesco	3,261	5,000	16,305
TOTAL	15,985	7,379	117,949

Source: Experian Goad

**BROXBORNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

NEED: CAUTIOUS GROWTH SCENARIO

TABLE 14

FUTURE SHOP FLOORSPACE CAPACITY: GLOBAL CAPACITY FORECASTS

GROWTH IN SALES PER SQ M	COMPARISON		GOODS			
	0% pa 2009 - 2013 1.5% pa 2013 - 2018 2% pa 2018 - 2026		2009	2013	2018	2023
	COMPARISON GOODS					
Total Available Expenditure (£000)	926,495	994,682	1,173,073	1,522,648	1,778,662	
Market Share from Survey Area (%)	18	18	18	18	18	
Survey Area Residents Spending (£000)	163,958	175,784	206,983	268,375	313,284	
<i>Inflow to Waltham Cross & Brookfield Centre from Beyond Survey Area (5%) £000</i>	7,271	7,789	9,167	11,880	13,867	
Total Town Centre Turnover	171,228	183,573	216,150	280,255	327,151	
Existing Shop Floorspace (sq m net)	51,502	51,502	51,502	51,502	51,502	
Sales per sq m net £	3,325	3,325	3,582	3,954	4,196	
Sales from Existing Floorspace (£000)	171,228	171,228	184,462	203,660	216,126	
Sales from Committed Floorspace (£000)	0	0	0	0	0	
Residual Spending to Support new shops (£000)	0	12,344	31,688	76,594	111,025	
Sales per sq m net in new shops (£)	3,500	3,500	3,770	4,163	4,418	
Capacity for new floorspace (sq m net)	0	3,527	8,404	18,399	25,132	

**BROXBORNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

NEED: CAUTIOUS GROWTH SCENARIO

TABLE 15

FUTURE SHOP FLOORSPACE CAPACITY: HODDESDON TOWN CENTRE

GROWTH IN SALES PER SQ M	COMPARISON	0	%pa 2009-2013		
	GOODS	1.5	%pa 2013-2018		
		2	%pa 2018-2026		
	COMPARISON GOODS				
	2009	2013	2018	2023	2026
Total Available Expenditure (£000)	926,495	994,682	1,173,073	1,522,648	1,778,662
Market Share from Survey Area (%)	2	2	2	2	2
Survey Area Residents Spending (£000)	16,634	17,956	21,214	27,618	32,260
Total Town Centre Turnover	16,634	17,956	21,214	27,618	32,260
Existing Shop Floorspace (sq m net)	8,798	8,798	8,798	8,798	8,798
Sales per sq m net £	1,891	1,891	2,037	2,249	2,386
Sales from Existing Floorspace (£000)	16,634	16,634	17,920	19,785	20,996
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	1,321	3,294	7,833	11,264
Sales per sq m net in new shops (£)	3,500	3,500	3,770	4,163	4,418
Capacity for new floorspace (sq m net)	0	378	874	1,882	2,550

**BROXBORNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

NEED: CAUTIOUS GROWTH SCENARIO

TABLE 16

FUTURE SHOP FLOORSPACE CAPACITY: WALTHAM CROSS TOWN CENTRE

GROWTH IN SALES PER SQ M	COMPARISON	0	%pa 2009-2013		
	GOODS	1.5	%pa 2013-2018		
		2	%pa 2018-2026		
	COMPARISON GOODS				
	2009	2013	2018	2023	2026
Total Available Expenditure (£000)	926,495	994,682	1,173,073	1,522,648	1,778,662
Market Share from Survey Area (%)	7	7	7	7	7
Survey Area Residents Spending (£000)	60,973	65,116	76,383	98,738	115,172
Inflow to <i>Waltham Cross Town Centre</i> from Beyond Survey Area (5%) £000	3,209	3,427	4,020	5,197	6,062
Total Town Centre Turnover	64,182	68,543	80,403	103,935	121,234
Existing Shop Floorspace (sq m net)	22,260	22,260	22,260	22,260	22,260
Sales per sq m net £	2,883	2,883	3,106	3,429	3,639
Sales from Existing Floorspace (£000)	64,182	64,182	69,142	76,338	81,011
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	4,362	11,261	27,597	40,223
Sales per sq m net in new shops (£)	3,500	3,500	3,770	4,163	4,418
Capacity for new floorspace (sq m net)	0	1,246	2,987	6,629	9,105

**BROXBORNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

NEED: CAUTIOUS GROWTH SCENARIO

TABLE 17

FUTURE SHOP FLOORSPACE CAPACITY: CHESHUNT DISTRICT CENTRE

GROWTH IN SALES PER SQ M	COMPARISON	0	%pa 2009-2013		
	GOODS	1.5	%pa 2013-2018		
		2	%pa 2018-2026		
	COMPARISON GOODS				
	2009	2013	2018	2023	2026
Total Available Expenditure (£000)	926,495	994,682	1,173,073	1,522,648	1,778,662
Market Share from Survey Area (%)	1	1	1	1	1
Survey Area Residents Spending (£000)	9,177	9,836	11,597	15,040	17,557
Total Town Centre Turnover	9,177	9,836	11,597	15,040	17,557
Existing Shop Floorspace (sq m net)	4,459	4,459	4,459	4,459	4,459
Sales per sq m net £	2,058	2,058	2,217	2,448	2,598
Sales from Existing Floorspace (£000)	9,177	9,177	9,886	10,915	11,583
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	659	1,711	4,125	5,974
Sales per sq m net in new shops (£)	3,500	3,500	3,770	4,163	4,418
Capacity for new floorspace (sq m net)	0	188	454	991	1,352

**BROXBORNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

NEED: CAUTIOUS GROWTH SCENARIO

TABLE 18

FUTURE SHOP FLOORSPACE CAPACITY: BROOKFIELD CENTRE

GROWTH IN SALES PER SQ M	COMPARISON	0	%pa 2009-2013		
	GOODS	1.5	%pa 2013-2018		
		2	%pa 2018-2026		
	COMPARISON GOODS				
	2009	2013	2018	2023	2026
Total Available Expenditure (£000)	926,495	994,682	1,173,073	1,522,648	1,778,662
Market Share from Survey Area (%)	8	8	8	8	8
Survey Area Residents Spending (£000)	77,174	82,876	97,789	126,979	148,295
Inflow to Brookfield Centre from Beyond Survey Area (5%) £000	4,062	4,362	5,147	6,683	7,805
Total Centre Turnover	81,235	87,238	102,936	133,662	156,100
Existing Shop Floorspace (sq m net)	15,985	15,985	15,985	15,985	15,985
Sales per sq m net £	5,082	5,082	5,475	6,045	6,415
Sales from Existing Floorspace (£000)	81,235	81,235	87,514	96,622	102,536
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	6,002	15,422	37,040	53,564
Sales per sq m net in new shops (£)	3,500	3,500	3,770	4,163	4,418
Capacity for new floorspace (sq m net)	0	1,715	4,090	8,898	12,125

APPENDIX 10

GLOBAL CAPACITY FORECASTS

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

**TABLE 1A
GLOBAL CAPACITY: BASE SCENARIO**

	Retail Location	Forecast Total Turnover 2009 (£000) Base Position	Forecast Total Turnover 2018 (£000) No New Development	Forecast Required Total Turnover 2018 (£000) Baseline Trade Draw Grown by 1.5% pa	Surplus Expenditure 2018 (£000)
1	Brookfield	83,583	121,328	97,002	24,326
2	Waltham Cross	66,037	94,768	76,638	18,130
3	Hoddesdon	17,115	25,005	19,863	5,142
4	Cheshunt	9,442	13,669	10,958	2,711
5	Enfield	211,509	305,838	245,465	60,373
6	Harlow	343,439	500,262	398,574	101,688
7	Enfield Retail Parks	102,591	147,831	119,061	28,769
8	Welwyn Garden City	188,426	274,272	218,677	55,595
9	London West End	5,076,663	7,363,134	5,891,675	1,471,459
10	Hertford	173,395	252,678	201,232	51,446
11	Stevenage	304,115	441,711	352,938	88,773
12	Lakeside	486,495	705,399	564,597	140,802
13	Hatfield	207,501	301,116	240,813	60,304
14	Watford	538,119	780,423	624,509	155,914
15	Bluewater	540,054	783,271	626,755	156,516
	Other	268,181	387,216	311,236	75,980
	TOTAL	8,616,667	12,497,922	9,999,993	2,497,929

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

**TABLE 1B
GLOBAL CAPACITY: TREND SCENARIO**

	Retail Location	Forecast Total Turnover 2009 (£000) Base Position	Forecast Total Turnover 2018 (£000) No New Development	Forecast Required Total Turnover 2018 (£000) Baseline Trade Draw Grown by 1.5% pa	Surplus Expenditure 2018 (£000)
1	Brookfield	85,039	133,414	98,691	34,723
2	Waltham Cross	67,187	104,209	77,973	26,236
3	Hoddesdon	17,413	27,495	20,209	7,287
4	Cheshunt	9,607	15,031	11,149	3,882
5	Enfield	211,509	330,531	245,465	85,066
6	Harlow	343,439	540,722	398,574	142,147
7	Enfield Retail Parks	104,378	162,557	121,135	41,422
8	Welwyn Garden City	188,426	296,450	218,677	77,774
9	London West End	5,076,663	7,958,045	5,891,675	2,066,370
10	Hertford	173,395	273,116	201,232	71,883
11	Stevenage	304,115	477,411	352,938	124,473
12	Lakeside	486,495	762,389	564,597	197,792
13	Hatfield	207,501	325,448	240,813	84,635
14	Watford	538,119	843,477	624,509	218,968
15	Bluewater	540,054	846,556	626,755	219,801
	Other	272,852	425,790	316,656	109,134
	TOTAL	8,626,193	13,522,643	10,011,049	3,511,595

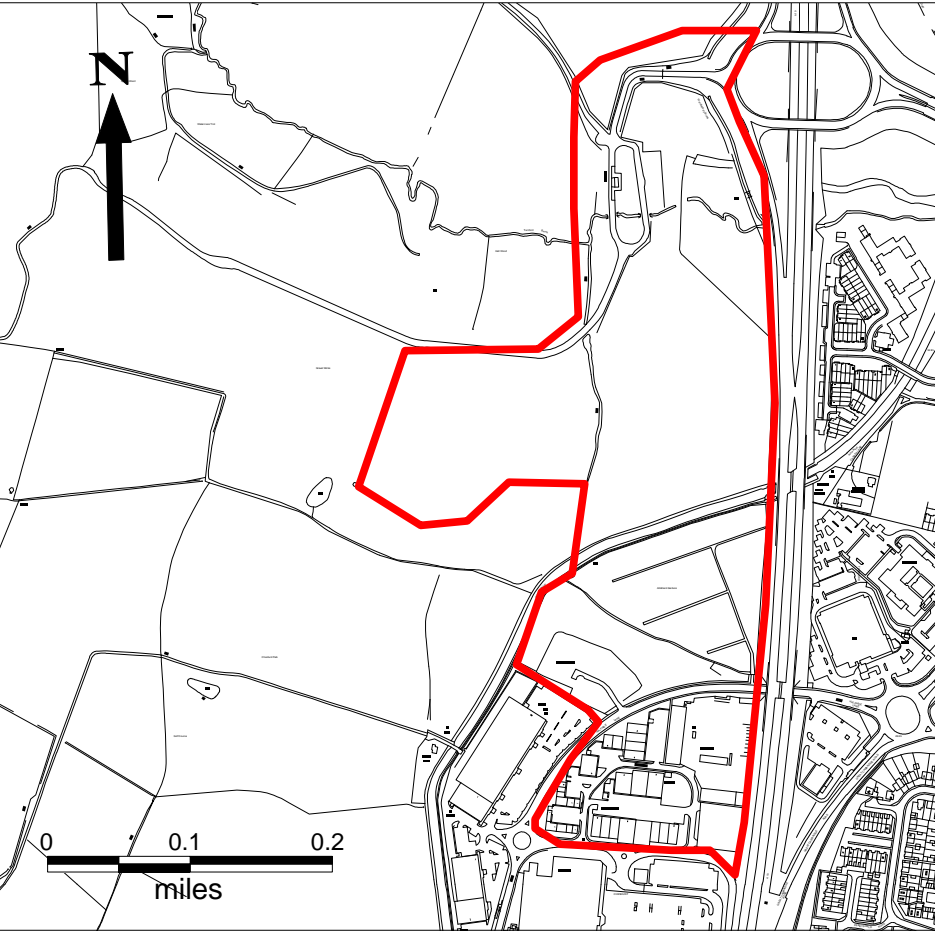
**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

**TABLE 1C
GLOBAL CAPACITY: CAUTIOUS SCENARIO**

	Retail Location	Forecast Total Turnover 2009 (£000) Base Position	Forecast Total Turnover 2018 (£000) No New Development	Forecast Required Total Turnover 2018 (£000) Baseline Trade Draw Grown by 1.5% pa	Surplus Expenditure 2018 (£000)
1	Brookfield	81,235	102,936	94,277	8,659
2	Waltham Cross	64,182	80,403	74,486	5,917
3	Hoddesdon	16,634	21,214	19,305	1,909
4	Cheshunt	9,177	11,597	10,650	947
5	Enfield	211,509	267,000	245,465	21,535
6	Harlow	343,439	436,644	398,574	38,069
7	Enfield Retail Parks	99,709	125,421	115,717	9,705
8	Welwyn Garden City	188,426	239,398	218,677	20,721
9	London West End	5,076,663	6,427,539	5,891,675	535,864
10	Hertford	173,395	220,542	201,232	19,310
11	Stevenage	304,115	385,570	352,938	32,632
12	Lakeside	486,495	615,773	564,597	51,176
13	Hatfield	207,501	262,851	240,813	22,038
14	Watford	538,119	681,261	624,509	56,751
15	Bluewater	540,054	683,745	626,755	56,990
	Other	260,648	328,519	302,493	26,026
	TOTAL	8,601,303	10,890,413	9,982,163	908,250

APPENDIX 11

GREATER BROOKFIELD PROPOSED STRATEGIC GROWTH ALLOCATION



APPENDIX 12

IMPACT: BASE

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

IMPACT: BASE GROWTH SCENARIO

TABLE 1
SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	2009	2013	2018	2023	2026
1	EN11 0/8/9	20,526	21,208	21,811	22,555	22,940
2	EN 10 6/7	15,909	16,343	16,909	17,415	17,680
3	EN 7 5/6	21,428	22,109	22,960	23,774	24,250
4	EN 8 0/7/8/9	33,255	34,038	35,008	35,957	36,533
5	CM 19 5, EN 9 2	13,734	14,377	15,149	15,660	15,952
6	EN 9 1/2, 1G 10 4, E4 7	31,655	31,744	31,935	32,402	32,708
7	EN 3 4/5/6/7	48,538	50,435	52,501	54,535	55,905
8	EN 2 8/9, EN1 1/3/4, EN 2 0/6/7	67,715	68,789	70,093	71,398	72,422
9	EN 6 1/4/5	15,450	15,547	15,802	16,127	16,285
10	SG 13 8, AL 9 6, SG 14 1	10,043	10,371	10,883	11,324	11,539
11	SG 14 2/3, SG 12 0/7	34,547	35,903	37,399	38,869	39,643
12	SG 13 7, SG 12 8/9	22,112	23,167	24,504	25,814	26,453
TOTAL		334,912	344,031	354,954	365,830	372,310

SOURCE: Experian Business Solutions, September 2009

TABLE 1A
POPULATION GROWTH RATES

2009-2013 (%)	2009-2018 (%)	2009-2023 (%)	2009-2026 (%)
3.3	6.3	9.9	11.8
2.7	6.3	9.5	11.1
3.2	7.1	10.9	13.2
2.4	5.3	8.1	9.9
4.7	10.3	14.0	16.1
0.3	0.9	2.4	3.3
3.9	8.2	12.4	15.2
1.6	3.5	5.4	7.0
0.6	2.3	4.4	5.4
3.3	8.4	12.8	14.9
3.9	8.3	12.5	14.8
4.8	10.8	16.7	19.6
2.7	6.0	9.2	11.2

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

IMPACT: BASE GROWTH SCENARIO

**TABLE 2
COMPARISON GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2007 PRICES)**

GROWTH IN PER CAPITA RETAIL EXPENDITURE: 3.80 %pa 2007-2026												
ZONE	2007		2009		2013		2018		2023		2026	
	Minus SFT at 6.2%		Minus SFT at 6.3%		Minus SFT at 8%		Minus SFT at 8.5%		Minus SFT at 8.5%		Minus SFT at 8.5%	
1	3,112	2,919	3,353	3,142	3,892	3,581	4,690	4,292	5,652	5,172	6,321	5,784
2	3,286	3,082	3,540	3,317	4,110	3,781	4,953	4,532	5,968	5,461	6,674	6,107
3	3,192	2,994	3,439	3,223	3,993	3,673	4,811	4,402	5,797	5,304	6,484	5,932
4	2,878	2,700	3,101	2,906	3,600	3,312	4,338	3,969	5,227	4,783	5,846	5,349
5	3,256	3,054	3,508	3,287	4,073	3,747	4,907	4,490	5,913	5,411	6,614	6,051
6	3,217	3,018	3,466	3,248	4,024	3,702	4,849	4,437	5,843	5,346	6,534	5,979
7	2,492	2,337	2,685	2,516	3,117	2,868	3,756	3,437	4,526	4,141	5,062	4,631
8	1,747	1,639	1,882	1,764	2,185	2,010	2,633	2,409	3,173	2,903	3,548	3,247
9	3,582	3,360	3,859	3,616	4,480	4,122	5,399	4,940	6,506	5,953	7,276	6,657
10	3,399	3,188	3,662	3,432	4,251	3,911	5,123	4,688	6,173	5,648	6,904	6,317
11	3,314	3,109	3,571	3,346	4,145	3,814	4,995	4,570	6,019	5,507	6,731	6,159
12	3,356	3,148	3,616	3,388	4,198	3,862	5,058	4,628	6,095	5,577	6,817	6,237

Source: Experian Business Strategies and Expenditure Data for Broxbourne, September 2009

**TABLE 3
SURVEY AREA COMPARISON GOODS RETAIL EXPENDITURE FORECASTS**

ZONE	2009 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	64,488	75,947	93,607	116,644	132,679
2	52,777	61,798	76,626	95,098	107,974
3	69,052	81,209	101,071	126,108	143,862
4	96,623	112,727	138,947	171,970	195,410
5	45,146	53,867	68,024	84,733	96,532
6	102,808	117,513	141,680	173,221	195,558
7	122,114	144,628	180,430	225,841	258,922
8	119,430	138,288	168,873	207,280	235,144
9	55,871	64,083	78,060	95,997	108,414
10	34,463	40,564	51,014	63,963	72,894
11	115,584	136,916	170,925	214,060	244,169
12	74,918	89,467	113,410	143,965	164,994
TOTAL	953,273	1,117,007	1,382,667	1,718,880	1,956,552

Source: Tables 1&2

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

IMPACT: BASE GROWTH SCENARIO

**TABLE 4
COMPARISON GOODS ALLOCATION 2009 - NO NEW DEVELOPMENT
% MARKET SHARE**

	Retail Location	ZONE 1 %	ZONE 2 %	ZONE 3 %	ZONE 4 %	ZONE 5 %	ZONE 6 %	ZONE 7 %	ZONE 8 %	ZONE 9 %	ZONE 10 %	ZONE 11 %	ZONE 12 %
1	Brookfield	10.4	18.3	18.4	19.8	4.7	6.2	3.4	2.0	4.9	3.8	5.3	8.1
2	Waltham Cross	1.8	5.3	13.6	21.4	2.9	12.7	5.0	3.8	2.2	0.4	1.1	1.3
3	Hoddesdon	12.6	5.4	1.2	0.0	2.7	0.3	0.2	0.3	0.3	0.2	1.4	1.7
4	Cheshunt	0.0	2.6	3.7	4.0	0.2	0.7	0.0	0.0	0.4	0.0	0.0	0.9
5	Enfield	1.1	2.0	11.0	6.1	1.5	4.7	37.9	41.1	7.6	1.7	0.7	1.3
6	Harlow	35.2	17.5	6.5	6.2	50.3	12.4	1.9	2.0	0.3	2.4	15.2	26.5
7	Enfield Retail Parks	1.2	3.3	8.1	7.7	1.8	6.9	16.1	21.8	3.5	0.7	0.2	0.3
8	Welwyn Garden City	6.5	8.2	9.8	1.3	4.8	1.0	0.0	2.6	21.7	25.6	14.6	18.0
9	London West End	2.2	5.6	2.3	0.4	2.4	6.0	3.3	3.5	4.9	4.0	2.6	3.3
10	Hertford	3.0	0.9	0.5	0.4	0.5	0.0	0.7	0.1	0.1	20.2	13.1	10.7
11	Stevenage	0.3	0.2	0.0	0.3	0.5	0.0	0.0	0.0	2.8	7.1	14.4	2.9
12	Lakeside	1.1	1.2	4.0	2.0	4.0	5.3	0.7	0.3	0.0	1.2	0.0	0.5
13	Hatfield	0.5	0.6	1.0	0.3	0.0	0.0	0.7	0.5	3.8	3.2	3.9	1.9
14	Watford	0.0	0.3	0.2	0.0	0.0	0.0	0.3	1.9	1.9	0.2	0.0	0.9
15	Bluewater	0.3	1.0	0.8	0.0	0.9	1.1	0.2	0.9	0.0	0.3	0.3	0.5
	Sub-Total	76.2	72.3	80.9	69.8	77.2	57.3	70.4	80.9	54.4	71.2	72.8	78.9
	Other	23.8	27.7	19.1	30.2	22.8	42.7	29.6	19.1	45.6	28.8	27.2	21.1
	TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

IMPACT: BASE GROWTH SCENARIO

**TABLE 5
COMPARISON GOODS ALLOCATION 2009 - NO NEW DEVELOPMENT
SPEND (£000)**

	Retail Location	ZONE 1 £000	ZONE 2 £000	ZONE 3 £000	ZONE 4 £000	ZONE 5 £000	ZONE 6 £000	ZONE 7 £000	ZONE 8 £000	ZONE 9 £000	ZONE 10 £000	ZONE 11 £000	ZONE 12 £000	TOTAL	TRADE DRAW FROM BEYOND ZONE 1-12 £000	TOTAL TURNOVER £000
1	Brookfield	6,713	9,653	12,711	19,112	2,118	6,350	4,154	2,371	2,735	1,320	6,084	6,084	79,404	4,179	83,583
2	Waltham Cross	1,186	2,820	9,373	20,642	1,309	13,061	6,145	4,581	1,254	149	1,232	982	62,735	3,302	66,037
3	Hoddesdon	8,154	2,843	796	0	1,200	332	202	386	174	70	1,673	1,285	17,115	0	17,115
4	Cheshunt	0	1,382	2,548	3,891	80	684	0	0	196	0	0	661	9,442	0	9,442
5	Enfield	730	1,047	7,575	5,913	660	4,855	46,272	49,087	4,253	596	842	966	122,795	88,714	211,509
6	Harlow	22,706	9,255	4,454	5,988	22,699	12,742	2,309	2,430	174	821	17,613	19,832	121,024	222,414	343,439
7	Enfield Retail Parks	763	1,735	5,567	7,395	821	7,101	19,641	26,076	1,934	254	279	246	71,814	30,777	102,591
8	Welwyn Garden City	4,188	4,344	6,789	1,254	2,144	1,049	0	3,050	12,117	8,812	16,862	13,518	74,127	114,300	188,426
9	London West End	1,395	2,933	1,591	365	1,086	6,119	4,016	4,189	2,748	1,383	3,010	2,457	31,290	5,045,373	5,076,663
10	Hertford	1,953	453	312	365	246	0	869	95	49	6,970	15,103	8,025	34,440	138,955	173,395
11	Stevenage	168	93	0	276	214	0	0	1,584	2,457	16,691	2,189	23,672	280,444	304,115	
12	Lakeside	689	610	2,771	1,980	1,828	5,435	876	386	0	414	0	346	15,335	471,160	486,495
13	Hatfield	312	330	681	276	0	0	876	551	2,109	1,098	4,465	1,452	12,150	195,351	207,501
14	Watford	0	151	131	0	0	0	349	2,317	1,069	74	0	644	4,735	533,384	538,119
15	Bluewater	168	532	561	0	429	1,168	231	1,069	0	116	331	409	5,013	535,041	540,054
	Sub-Total	49,125	38,180	55,859	67,457	34,836	58,898	85,940	96,588	30,395	24,535	84,184	59,095	685,092	7,663,394	8,348,485
	Other	15,363	14,597	13,193	29,166	10,310	43,910	36,174	22,842	25,476	9,928	31,400	15,822	268,181	-	268,181
	TOTAL	64,488	52,777	69,052	96,623	45,146	102,808	122,114	119,430	55,871	34,463	115,584	74,918	953,273	7,663,394	8,616,667

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

IMPACT: BASE GROWTH SCENARIO

**TABLE 6
COMPARISON GOODS ALLOCATION 2018 - NO NEW DEVELOPMENT
SPEND (£000)**

	Retail Location	ZONE 1 £000	ZONE 2 £000	ZONE 3 £000	ZONE 4 £000	ZONE 5 £000	ZONE 6 £000	ZONE 7 £000	ZONE 8 £000	ZONE 9 £000	ZONE 10 £000	ZONE 11 £000	ZONE 12 £000	TOTAL	TRADE DRAW FROM BEYOND ZONE 1-12 £000	TOTAL TURNOVER £000
1	Brookfield	9,744	14,016	18,605	27,484	3,191	8,751	6,138	3,352	3,821	1,954	8,996	9,209	115,261	6,066	121,328
2	Waltham Cross	1,722	4,094	13,720	29,684	1,973	18,000	9,080	6,478	1,752	221	1,822	1,487	90,030	4,738	94,768
3	Hoddesdon	11,836	4,127	1,164	0	1,808	458	298	546	244	104	2,474	1,945	25,005	0	25,005
4	Cheshunt	0	2,006	3,730	5,596	120	943	0	0	273	0	0	1,001	13,669	0	13,669
5	Enfield	1,060	1,520	11,087	8,504	995	6,690	68,369	69,408	5,942	882	1,244	1,463	177,164	128,674	305,838
6	Harlow	32,958	13,437	6,520	8,610	34,202	17,560	3,412	3,436	244	1,216	26,046	30,022	177,663	322,599	500,262
7	Enfield Retail Parks	1,108	2,520	8,148	10,634	1,238	9,786	29,021	36,872	2,703	376	413	372	103,190	44,641	147,831
8	Welwyn Garden City	6,079	6,307	9,937	1,803	3,231	1,446	0	4,312	16,929	13,044	24,935	20,464	108,487	165,785	274,272
9	London West End	2,025	4,258	2,328	524	1,636	8,433	5,934	5,923	3,840	2,047	4,451	3,719	45,118	7,318,017	7,363,134
10	Hertford	2,835	658	456	524	371	0	1,284	135	68	10,318	22,334	12,148	51,132	201,546	252,678
11	Stevenage	243	135	0	397	323	0	0	0	2,212	3,637	24,682	3,314	34,944	406,767	441,711
12	Lakeside	1,000	885	4,056	2,847	2,755	7,490	1,294	546	0	612	0	524	22,010	683,390	705,399
13	Hatfield	453	479	997	397	0	0	1,294	780	2,946	1,626	6,603	2,197	17,772	283,344	301,116
14	Watford	0	219	192	0	0	0	516	3,276	1,494	110	0	974	6,781	773,642	780,423
15	Bluewater	243	772	821	0	646	1,610	341	1,512	0	172	489	619	7,226	776,046	783,271
	Sub-Total	71,307	55,433	81,760	97,006	52,489	81,167	126,981	136,574	42,467	36,319	124,491	89,458	995,451	11,115,256	12,110,706
	Other	22,300	21,194	19,311	41,942	15,535	60,513	53,449	32,299	35,594	14,696	46,434	23,952	387,216	-	387,216
	TOTAL	93,607	76,626	101,071	138,947	68,024	141,680	180,430	168,873	78,060	51,014	170,925	113,410	1,382,667	11,115,256	12,497,922

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

IMPACT: BASE GROWTH SCENARIO

**TABLE 7
GREATER BROOKFIELD PROPOSALS: COMPARISON GOODS**

	Gross (Additional) Fisp (sqm)	Net Fisp (sqm)	Co Average Sales (£ per sq m net)	Average Turnover 2018 (£000s)
GREATER BROOKFIELD PROPOSED SCHEME	50,000	35,000	5,000	175,000
TOTAL		35,000	5,000	175,000

**TABLE 8
NEW SCHEME TRADE DRAW 2018**

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	ZONE 11	ZONE 12	TOTAL ZONE 1-12	BEYOND ZONE 1-12	TOTAL
BROOKFIELD MARKET SHARE (%)	10.4	18.3	18.4	19.8	4.7	6.2	3.4	2.0	4.9	3.8	5.3	8.1	-	-	-
DRAW FROM ZONES (%)	8.0	11.5	15.2	22.9	2.5	7.6	5.0	2.8	3.3	1.6	7.3	7.3	95.0	5.0	100.0
DRAW FROM ZONES (£000)	14,055	20,212	26,614	40,016	4,434	13,295	8,697	4,963	5,726	2,764	12,737	12,737	166,250	8,750	175,000
MARKET SHARE UPLIFT (%)	15.01	26.38	26.33	28.80	6.52	9.38	4.82	2.94	7.33	5.42	7.45	11.23	-	-	-

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

IMPACT: BASE GROWTH SCENARIO

**TABLE 9
COMPARISON GOODS ALLOCATION 2018 - WITH BROOKFIELD DEVELOPMENT
% MARKET SHARE**

	Retail Location	ZONE 1 %	ZONE 2 %	ZONE 3 %	ZONE 4 %	ZONE 5 %	ZONE 6 %	ZONE 7 %	ZONE 8 %	ZONE 9 %	ZONE 10 %	ZONE 11 %	ZONE 12 %
1	Brookfield	24.7	43.3	43.4	45.3	10.9	15.1	8.0	4.8	11.9	9.0	12.3	18.8
2	Waltham Cross	1.8	4.9	13.4	18.8	2.8	12.6	4.8	3.8	2.2	0.4	1.0	1.2
3	Hoddesdon	12.5	5.2	0.9	0.0	2.7	0.3	0.2	0.3	0.3	0.2	1.3	1.7
4	Cheshunt	0.0	2.6	3.6	4.0	0.2	0.7	0.0	0.0	0.4	0.0	0.0	0.9
5	Enfield	1.1	1.0	4.6	1.9	1.5	3.7	35.4	40.0	7.0	1.5	0.7	1.3
6	Harlow	26.6	8.3	3.7	1.9	46.0	9.6	1.9	1.5	0.3	1.8	15.0	23.3
7	Enfield Retail Parks	1.1	3.1	7.0	4.6	1.8	6.4	15.2	21.4	3.5	0.7	0.2	0.3
8	Welwyn Garden City	5.8	5.4	6.0	0.4	4.8	1.0	0.0	2.6	20.1	24.2	13.5	15.7
9	London West End	1.0	1.8	0.9	0.2	2.1	3.6	3.3	3.3	3.0	3.5	2.1	2.2
10	Hertford	2.7	0.3	0.5	0.2	0.5	0.0	0.7	0.1	0.1	18.9	11.6	9.9
11	Stevenage	0.3	0.2	0.0	0.2	0.5	0.0	0.0	0.0	2.6	6.9	12.9	2.5
12	Lakeside	0.7	0.6	1.3	0.6	3.9	4.9	0.7	0.3	0.0	1.2	0.0	0.5
13	Hatfield	0.5	0.4	0.5	0.1	0.0	0.0	0.7	0.5	3.2	2.9	3.8	1.5
14	Watford	0.0	0.2	0.2	0.0	0.0	0.0	0.3	1.9	1.6	0.2	0.0	0.9
15	Bluewater	0.3	0.5	0.3	0.0	0.8	1.1	0.2	0.9	0.0	0.3	0.3	0.5
	Sub-Total	79.2	77.6	86.2	78.1	78.5	59.0	71.3	81.3	56.1	71.7	74.9	81.1
	Other	20.8	22.4	13.8	21.9	21.5	41.0	28.7	18.7	43.9	28.3	25.1	18.9
	TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

IMPACT: BASE GROWTH SCENARIO

**TABLE 10
COMPARISON GOODS ALLOCATION 2018 - WITH BROOKFIELD DEVELOPMENT
SPEND (£000)**

	Retail Location	ZONE 1 £000	ZONE 2 £000	ZONE 3 £000	ZONE 4 £000	ZONE 5 £000	ZONE 6 £000	ZONE 7 £000	ZONE 8 £000	ZONE 9 £000	ZONE 10 £000	ZONE 11 £000	ZONE 12 £000	TOTAL	TRADE DRAW FROM BEYOND ZONE 1-12 £000	TOTAL TURNOVER £000
1	Brookfield	23,096	33,217	43,888	62,896	7,404	21,381	14,400	8,067	9,260	4,580	21,097	21,309	270,596	14,242	284,838
2	Waltham Cross	1,722	3,755	13,497	26,154	1,936	17,842	8,594	6,337	1,710	221	1,642	1,311	84,721	4,459	89,180
3	Hoddesdon	11,731	3,958	942	0	1,808	458	298	546	244	104	2,294	1,886	24,269	0	24,269
4	Cheshunt	0	1,964	3,674	5,519	120	943	0	0	273	0	0	971	13,465	0	13,465
5	Enfield	1,060	758	4,640	2,672	995	5,192	63,891	67,608	5,442	744	1,244	1,463	155,709	128,674	284,383
6	Harlow	24,941	6,325	3,741	2,625	31,277	13,618	3,412	2,499	244	939	25,686	26,371	141,678	322,599	464,278
7	Enfield Retail Parks	1,055	2,350	7,036	6,337	1,238	8,998	27,467	36,122	2,703	376	413	372	94,467	44,641	139,108
8	Welwyn Garden City	5,450	4,148	6,046	576	3,231	1,446	0	4,312	15,682	12,352	23,134	17,823	94,199	165,785	259,984
9	London West End	923	1,379	883	217	1,418	5,122	5,934	5,548	2,379	1,770	3,550	2,546	31,670	7,318,017	7,349,686
10	Hertford	2,520	235	456	217	371	0	1,284	135	68	9,626	19,813	11,268	45,993	201,546	247,539
11	Stevenage	243	135	0	244	323	0	0	0	2,004	3,499	22,071	2,844	31,362	406,767	438,130
12	Lakeside	685	462	1,277	852	2,682	6,938	1,294	546	0	612	0	524	15,873	683,390	699,263
13	Hatfield	453	309	553	167	0	0	1,294	780	2,529	1,488	6,513	1,728	15,813	283,344	299,157
14	Watford	0	134	192	0	0	0	516	3,276	1,285	110	0	974	6,488	773,642	780,130
15	Bluewater	243	349	265	0	573	1,610	341	1,512	0	172	489	619	6,174	776,046	782,219
	Sub-Total	74,124	59,479	87,091	108,478	53,377	83,548	128,726	137,287	43,822	36,592	127,946	92,010	1,032,478	11,123,152	12,155,629
	Other	19,483	17,147	13,980	30,469	14,647	58,132	51,704	31,586	34,238	14,423	42,979	21,400	350,189	-	350,189
	TOTAL	93,607	76,626	101,071	138,947	68,024	141,680	180,430	168,873	78,060	51,014	170,925	113,410	1,382,667	11,123,152	12,505,818

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

IMPACT: BASE GROWTH SCENARIO

**TABLE 11
IMPACT OF 50,000 SQM GROSS (35,000 SQM NET) BROOKFIELD SCHEME ON TOWN CENTRE TURNOVER**

	TURNOVER 2009 (£000) BASE POSITION	TURNOVER 2018 (£000) NO NEW DEVELOPMENT	TURNOVER 2018 (£000) WITH BROOKFIELD PROPOSALS	IMPACT OF BROOKFIELD ON TURNOVER 2018 (£000)	
	£000	£000	£000	£000	%
Brookfield	83,583	121,328	284,838	163,510	134.8
Waltham Cross	66,037	94,768	89,180	-5,588	-5.9
Hoddesdon	17,115	25,005	24,269	-735	-2.9
Cheshunt	9,442	13,669	13,465	-204	-1.5
Enfield	211,509	305,838	284,383	-21,455	-7.0
Harlow	343,439	500,262	464,278	-35,985	-7.2
Enfield Retail Parks	102,591	147,831	139,108	-8,723	-5.9
Welwyn Garden City	188,426	274,272	259,984	-14,288	-5.2
London West End	5,076,663	7,363,134	7,349,686	-13,448	-0.2
Hertford	173,395	252,678	247,539	-5,139	-2.0
Stevenage	304,115	441,711	438,130	-3,582	-0.8
Lakeside	486,495	705,399	699,263	-6,137	-0.9
Hatfield	207,501	301,116	299,157	-1,959	-0.7
Watford	538,119	780,423	780,130	-293	0.0
Bluewater	540,054	783,271	782,219	-1,052	-0.1
OTHER	268,181	387,216	350,189	-37,027	-9.6
TOTAL	8,616,667	12,497,922	12,505,818	-	-

APPENDIX 13

IMPACT: CAUTIOUS

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

IMPACT: CAUTIOUS GROWTH SCENARIO

TABLE 1
SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	2009	2013	2018	2023	2026
1	EN11 0/8/9	20,526	21,208	21,811	22,555	22,940
2	EN 10 6/7	15,909	16,343	16,909	17,415	17,680
3	EN 7 5/6	21,428	22,109	22,960	23,774	24,250
4	EN 8 0/7/8/9	33,255	34,038	35,008	35,957	36,533
5	CM 19 5, EN 9 2	13,734	14,377	15,149	15,660	15,952
6	EN 9 1/2, 1G 10 4, E4 7	31,655	31,744	31,935	32,402	32,708
7	EN 3 4/5/6/7	48,538	50,435	52,501	54,535	55,905
8	EN 2 8/9, EN1 1/3/4, EN 2 0/6/7	67,715	68,789	70,093	71,398	72,422
9	EN 6 1/4/5	15,450	15,547	15,802	16,127	16,285
10	SG 13 8, AL 9 6, SG 14 1	10,043	10,371	10,883	11,324	11,539
11	SG 14 2/3, SG 12 0/7	34,547	35,903	37,399	38,869	39,643
12	SG 13 7, SG 12 8/9	22,112	23,167	24,504	25,814	26,453
TOTAL		334,912	344,031	354,954	365,830	372,310

SOURCE: Experian Business Solutions, September 2009

TABLE 1A
POPULATION GROWTH RATES

2009-2013 (%)	2009-2018 (%)	2009-2023 (%)	2009-2026 (%)
3.3	6.3	9.9	11.8
2.7	6.3	9.5	11.1
3.2	7.1	10.9	13.2
2.4	5.3	8.1	9.9
4.7	10.3	14.0	16.1
0.3	0.9	2.4	3.3
3.9	8.2	12.4	15.2
1.6	3.5	5.4	7.0
0.6	2.3	4.4	5.4
3.3	8.4	12.8	14.9
3.9	8.3	12.5	14.8
4.8	10.8	16.7	19.6
2.7	6.0	9.2	11.2

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

IMPACT: CAUTIOUS GROWTH SCENARIO

TABLE 2
COMPARISON GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2007 PRICES)

ZONE		GROWTH IN PER CAPITA RETAIL EXPENDITURE:													
		2007		2008		2009		2013		2018		2023		2026	
		Minus SFT at 6.2%		Minus SFT at 6.3%		Minus SFT at 6.5%		Minus SFT at 8%		Minus SFT at 8.5%		Minus SFT at 8.5%			
		3.8% pa 2007-2008 1.1% pa 2008-2009 1.5% pa 2009-2013 2.8% pa 2013-2018 4.7% pa 2018-2026													
1		3,112	2,919	3,230	3,027	3,266	3,054	3,466	3,189	3,979	3,641	5,007	4,581	5,746	5,258
2		3,286	3,082	3,411	3,196	3,448	3,224	3,660	3,367	4,202	3,845	5,287	4,837	6,068	5,552
3		3,192	2,994	3,313	3,105	3,350	3,132	3,555	3,271	4,082	3,735	5,135	4,699	5,894	5,393
4		2,878	2,700	2,987	2,799	3,020	2,824	3,206	2,949	3,680	3,367	4,630	4,237	5,314	4,863
5		3,256	3,054	3,380	3,167	3,417	3,195	3,627	3,336	4,164	3,810	5,238	4,793	6,012	5,501
6		3,217	3,018	3,339	3,129	3,376	3,157	3,583	3,296	4,114	3,764	5,176	4,736	5,940	5,435
7		2,492	2,337	2,587	2,424	2,615	2,445	2,776	2,554	3,187	2,916	4,009	3,668	4,602	4,210
8		1,747	1,639	1,813	1,699	1,833	1,714	1,946	1,790	2,234	2,044	2,811	2,572	3,226	2,952
9		3,582	3,360	3,718	3,484	3,759	3,515	3,990	3,671	4,580	4,191	5,763	5,273	6,614	6,052
10		3,399	3,188	3,528	3,306	3,567	3,335	3,786	3,483	4,346	3,977	5,468	5,004	6,276	5,743
11		3,314	3,109	3,440	3,223	3,478	3,252	3,691	3,396	4,238	3,878	5,332	4,878	6,119	5,599
12		3,356	3,148	3,484	3,264	3,522	3,293	3,738	3,439	4,291	3,927	5,399	4,940	6,197	5,670

Source: Experian Business Strategies and Expenditure Data for Broxbourne, September 2007

TABLE 3
SURVEY AREA COMPARISON GOODS RETAIL EXPENDITURE FORECASTS

ZONE	2009 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	62,676	67,630	79,417	103,327	120,616
2	51,294	55,030	65,011	84,241	98,157
3	67,113	72,316	85,750	111,712	130,782
4	93,909	100,382	117,885	152,338	177,643
5	43,877	47,968	57,712	75,060	87,755
6	99,920	104,644	120,204	153,446	177,778
7	118,683	128,790	153,079	200,058	235,381
8	116,075	123,144	143,274	183,617	213,765
9	54,302	57,065	66,227	85,038	98,557
10	33,495	36,122	43,281	56,661	66,266
11	112,337	121,922	145,015	189,622	221,969
12	72,813	79,670	96,218	127,529	149,993
TOTAL	926,495	994,682	1,173,073	1,522,648	1,778,662

Source: Tables 1&2

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

IMPACT: CAUTIOUS GROWTH SCENARIO

**TABLE 4
COMPARISON GOODS ALLOCATION 2009 - NO NEW DEVELOPMENT
% MARKET SHARE**

	Retail Location	ZONE 1 %	ZONE 2 %	ZONE 3 %	ZONE 4 %	ZONE 5 %	ZONE 6 %	ZONE 7 %	ZONE 8 %	ZONE 9 %	ZONE 10 %	ZONE 11 %	ZONE 12 %
1	Brookfield	10.4	18.3	18.4	19.8	4.7	6.2	3.4	2.0	4.9	3.8	5.3	8.1
2	Waltham Cross	1.8	5.3	13.6	21.4	2.9	12.7	5.0	3.8	2.2	0.4	1.1	1.3
3	Hoddesdon	12.6	5.4	1.2	0.0	2.7	0.3	0.2	0.3	0.3	0.2	1.4	1.7
4	Cheshunt	0.0	2.6	3.7	4.0	0.2	0.7	0.0	0.0	0.4	0.0	0.0	0.9
5	Enfield	1.1	2.0	11.0	6.1	1.5	4.7	37.9	41.1	7.6	1.7	0.7	1.3
6	Harlow	35.2	17.5	6.5	6.2	50.3	12.4	1.9	2.0	0.3	2.4	15.2	26.5
7	Enfield Retail Parks	1.2	3.3	8.1	7.7	1.8	6.9	16.1	21.8	3.5	0.7	0.2	0.3
8	Welwyn Garden City	6.5	8.2	9.8	1.3	4.8	1.0	0.0	2.6	21.7	25.6	14.6	18.0
9	London West End	2.2	5.6	2.3	0.4	2.4	6.0	3.3	3.5	4.9	4.0	2.6	3.3
10	Hertford	3.0	0.9	0.5	0.4	0.5	0.0	0.7	0.1	0.1	20.2	13.1	10.7
11	Stevenage	0.3	0.2	0.0	0.3	0.5	0.0	0.0	0.0	2.8	7.1	14.4	2.9
12	Lakeside	1.1	1.2	4.0	2.0	4.0	5.3	0.7	0.3	0.0	1.2	0.0	0.5
13	Hatfield	0.5	0.6	1.0	0.3	0.0	0.0	0.7	0.5	3.8	3.2	3.9	1.9
14	Watford	0.0	0.3	0.2	0.0	0.0	0.0	0.3	1.9	1.9	0.2	0.0	0.9
15	Bluewater	0.3	1.0	0.8	0.0	0.9	1.1	0.2	0.9	0.0	0.3	0.3	0.5
	Sub-Total	76.2	72.3	80.9	69.8	77.2	57.3	70.4	80.9	54.4	71.2	72.8	78.9
	Other	23.8	27.7	19.1	30.2	22.8	42.7	29.6	19.1	45.6	28.8	27.2	21.1
	TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

IMPACT: CAUTIOUS GROWTH SCENARIO

**TABLE 5
COMPARISON GOODS ALLOCATION 2009 - NO NEW DEVELOPMENT
SPEND (£000)**

	Retail Location	ZONE 1 £000	ZONE 2 £000	ZONE 3 £000	ZONE 4 £000	ZONE 5 £000	ZONE 6 £000	ZONE 7 £000	ZONE 8 £000	ZONE 9 £000	ZONE 10 £000	ZONE 11 £000	ZONE 12 £000	TOTAL	TRADE DRAW FROM BEYOND ZONE 1-12 £000	TOTAL TURNOVER £000
1	Brookfield	6,524	9,382	12,354	18,575	2,058	6,172	4,037	2,304	2,658	1,283	5,913	5,913	77,174	4,062	81,235
2	Waltham Cross	1,153	2,741	9,110	20,062	1,272	12,694	5,972	4,452	1,219	145	1,197	955	60,973	3,209	64,182
3	Hoddesdon	7,925	2,763	773	0	1,166	323	196	375	169	68	1,626	1,249	16,634	0	16,634
4	Cheshunt	0	1,343	2,477	3,782	77	665	0	0	190	0	0	643	9,177	0	9,177
5	Enfield	709	1,017	7,362	5,747	642	4,718	44,972	47,708	4,134	579	818	939	119,346	92,163	211,509
6	Harlow	22,068	8,995	4,329	5,819	22,062	12,384	2,245	2,362	169	798	17,119	19,275	117,624	225,814	343,439
7	Enfield Retail Parks	742	1,687	5,410	7,187	798	6,902	19,089	25,344	1,880	247	272	239	69,797	29,913	99,709
8	Welwyn Garden City	4,071	4,222	6,598	1,219	2,084	1,020	0	2,964	11,776	8,564	16,388	13,138	72,045	116,382	188,426
9	London West End	1,356	2,850	1,546	354	1,055	5,948	3,903	4,071	2,671	1,344	2,925	2,388	30,411	5,046,252	5,076,663
10	Hertford	1,898	441	303	354	240	0	845	93	47	6,774	14,679	7,800	33,473	139,922	173,395
11	Stevenage	163	90	0	269	208	0	0	0	1,539	2,388	16,222	2,128	23,007	281,109	304,115
12	Lakeside	670	593	2,693	1,924	1,777	5,282	851	375	0	402	0	336	14,904	471,591	486,495
13	Hatfield	303	320	662	269	0	0	851	536	2,049	1,068	4,340	1,411	11,809	195,692	207,501
14	Watford	0	147	128	0	0	0	339	2,251	1,039	72	0	626	4,602	533,517	538,119
15	Bluewater	163	517	545	0	417	1,135	224	1,039	0	113	321	398	4,872	535,182	540,054
	Sub-Total	47,745	37,107	54,290	65,562	33,857	57,243	83,526	93,874	29,542	23,846	81,819	57,435	665,847	7,674,807	8,340,655
	Other	14,931	14,187	12,823	28,347	10,020	42,677	35,158	22,200	24,760	9,649	30,518	15,378	260,648	-	260,648
	TOTAL	62,676	51,294	67,113	93,909	43,877	99,920	118,683	116,075	54,302	33,495	112,337	72,813	926,495	7,674,807	8,601,303

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

IMPACT: CAUTIOUS GROWTH SCENARIO

**TABLE 6
COMPARISON GOODS ALLOCATION 2018 - NO NEW DEVELOPMENT
SPEND (£000)**

	Retail Location	ZONE 1 £000	ZONE 2 £000	ZONE 3 £000	ZONE 4 £000	ZONE 5 £000	ZONE 6 £000	ZONE 7 £000	ZONE 8 £000	ZONE 9 £000	ZONE 10 £000	ZONE 11 £000	ZONE 12 £000	TOTAL	TRADE DRAW FROM BEYOND ZONE 1-12 £000	TOTAL TURNOVER £000
1	Brookfield	8,267	11,891	15,785	23,318	2,707	7,424	5,207	2,844	3,242	1,658	7,633	7,813	97,789	5,147	102,936
2	Waltham Cross	1,461	3,473	11,640	25,184	1,674	15,271	7,703	5,496	1,486	187	1,546	1,261	76,383	4,020	80,403
3	Hoddesdon	10,042	3,502	988	0	1,534	389	253	463	207	88	2,099	1,650	21,214	0	21,214
4	Cheshunt	0	1,702	3,164	4,747	102	800	0	0	232	0	0	849	11,597	0	11,597
5	Enfield	899	1,290	9,406	7,215	844	5,676	58,005	58,887	5,041	748	1,056	1,241	150,308	116,691	267,000
6	Harlow	27,962	11,400	5,531	7,305	29,018	14,898	2,895	2,915	207	1,031	22,098	25,471	150,732	285,912	436,644
7	Enfield Retail Parks	940	2,138	6,913	9,022	1,050	8,303	24,622	31,282	2,293	319	351	316	87,548	37,874	125,421
8	Welwyn Garden City	5,158	5,351	8,430	1,530	2,741	1,227	0	3,659	14,363	11,067	21,155	17,362	92,042	147,356	239,398
9	London West End	1,718	3,613	1,975	445	1,388	7,155	5,034	5,025	3,258	1,736	3,776	3,156	38,278	6,389,261	6,427,539
10	Hertford	2,405	559	387	445	315	0	1,089	114	58	8,754	18,949	10,307	43,381	177,161	220,542
11	Stevenage	206	114	0	337	274	0	0	0	1,877	3,086	20,941	2,812	29,647	355,923	385,570
12	Lakeside	849	751	3,441	2,416	2,337	6,355	1,098	463	0	520	0	444	18,673	597,100	615,773
13	Hatfield	384	406	846	337	0	0	1,098	661	2,499	1,379	5,602	1,864	15,078	247,773	262,851
14	Watford	0	186	163	0	0	0	438	2,779	1,267	94	0	827	5,753	675,507	681,261
15	Bluewater	206	655	696	0	548	1,366	289	1,283	0	146	415	525	6,130	677,615	683,745
	Sub-Total	60,498	47,030	69,367	82,301	44,532	68,863	107,732	115,871	36,029	30,813	105,619	75,897	844,554	9,717,340	10,561,894
	Other	18,919	17,981	16,383	35,584	13,180	51,340	45,346	27,403	30,198	12,468	39,395	20,321	328,519	-	328,519
	TOTAL	79,417	65,011	85,750	117,885	57,712	120,204	153,079	143,274	66,227	43,281	145,015	96,218	1,173,073	9,717,340	10,890,413

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

IMPACT: CAUTIOUS GROWTH SCENARIO

**TABLE 7
GREATER BROOKFIELD PROPOSALS: COMPARISON GOODS**

	Gross (Additional) Flsp (sqm)	Net Flsp (sqm)	Co Average Sales (£ per sq m net)	Average Turnover 2018 (£000s)
GREATER BROOKFIELD PROPOSED SCHEME	50,000	35,000	5,000	175,000
TOTAL		35,000	5,000	175,000

**TABLE 8
NEW SCHEME TRADE DRAW 2018**

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	ZONE 11	ZONE 12	TOTAL ZONE 1-12	BEYOND ZONE 1-12	TOTAL
BROOKFIELD MARKET SHARE (%)	10.4	18.3	18.4	19.8	4.7	6.2	3.4	2.0	4.9	3.8	5.3	8.1	-	-	-
DRAW FROM ZONES (%)	8.0	11.5	15.2	22.9	2.5	7.6	5.0	2.8	3.3	1.6	7.3	7.3	95.0	5.0	100.0
DRAW FROM ZONES (£000)	14,055	20,212	26,614	40,016	4,434	13,295	8,697	4,963	5,726	2,764	12,737	12,737	166,250	8,750	175,000
MARKET SHARE UPLIFT (%)	17.70	31.09	31.04	33.94	7.68	11.06	5.68	3.46	8.65	6.39	8.78	13.24	-	-	-

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

IMPACT: CAUTIOUS GROWTH SCENARIO

**TABLE 9
COMPARISON GOODS ALLOCATION 2018 - WITH BROOKFIELD DEVELOPMENT
% MARKET SHARE**

	Retail Location	ZONE 1 %	ZONE 2 %	ZONE 3 %	ZONE 4 %	ZONE 5 %	ZONE 6 %	ZONE 7 %	ZONE 8 %	ZONE 9 %	ZONE 10 %	ZONE 11 %	ZONE 12 %
1	Brookfield	27.2	47.8	47.9	49.8	12.0	16.7	8.8	5.3	13.1	9.9	13.6	20.7
2	Waltham Cross	1.8	4.8	13.3	18.4	2.8	12.6	4.7	3.7	2.2	0.4	0.9	1.1
3	Hoddesdon	12.5	5.1	0.9	0.0	2.7	0.3	0.2	0.3	0.3	0.2	1.3	1.7
4	Cheshunt	0.0	2.6	3.6	4.0	0.2	0.7	0.0	0.0	0.4	0.0	0.0	0.9
5	Enfield	1.1	0.8	3.5	1.2	1.5	3.5	35.0	39.8	6.9	1.4	0.7	1.3
6	Harlow	25.1	6.6	3.2	1.1	45.2	9.1	1.9	1.4	0.3	1.7	15.0	22.7
7	Enfield Retail Parks	1.1	3.0	6.8	4.0	1.8	6.3	15.1	21.3	3.5	0.7	0.2	0.3
8	Welwyn Garden City	5.7	4.9	5.3	0.3	4.8	1.0	0.0	2.6	19.8	24.0	13.3	15.3
9	London West End	0.8	1.1	0.6	0.1	2.0	3.2	3.3	3.2	2.7	3.4	2.0	2.1
10	Hertford	2.6	0.2	0.5	0.1	0.5	0.0	0.7	0.1	0.1	18.6	11.3	9.8
11	Stevenage	0.3	0.2	0.0	0.2	0.5	0.0	0.0	0.0	2.5	6.8	12.6	2.4
12	Lakeside	0.7	0.5	0.8	0.4	3.9	4.8	0.7	0.3	0.0	1.2	0.0	0.5
13	Hatfield	0.5	0.4	0.5	0.1	0.0	0.0	0.7	0.5	3.1	2.9	3.8	1.4
14	Watford	0.0	0.2	0.2	0.0	0.0	0.0	0.3	1.9	1.6	0.2	0.0	0.9
15	Bluewater	0.3	0.4	0.2	0.0	0.8	1.1	0.2	0.9	0.0	0.3	0.3	0.5
	Sub-Total	79.7	78.6	87.1	79.5	78.7	59.3	71.5	81.4	56.4	71.8	75.2	81.5
	Other	20.3	21.4	12.9	20.5	21.3	40.7	28.5	18.6	43.6	28.2	24.8	18.5
	TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

IMPACT: CAUTIOUS GROWTH SCENARIO

**TABLE 10
COMPARISON GOODS ALLOCATION 2018 - WITH BROOKFIELD DEVELOPMENT
SPEND (£000)**

	Retail Location	ZONE 1 £000	ZONE 2 £000	ZONE 3 £000	ZONE 4 £000	ZONE 5 £000	ZONE 6 £000	ZONE 7 £000	ZONE 8 £000	ZONE 9 £000	ZONE 10 £000	ZONE 11 £000	ZONE 12 £000	TOTAL	TRADE DRAW FROM BEYOND ZONE 1-12 £000	TOTAL TURNOVER £000
1	Brookfield	21,619	31,092	41,068	58,730	6,920	20,055	13,469	7,559	8,681	4,284	19,733	19,913	253,124	13,322	266,446
2	Waltham Cross	1,461	3,135	11,418	21,654	1,637	15,114	7,218	5,355	1,445	187	1,365	1,085	71,074	3,741	74,815
3	Hoddesdon	9,937	3,332	766	0	1,534	389	253	463	207	88	1,919	1,591	20,479	0	20,479
4	Cheshunt	0	1,660	3,109	4,671	102	800	0	0	232	0	0	820	11,393	0	11,393
5	Enfield	899	528	2,959	1,383	844	4,178	53,527	57,087	4,541	610	1,056	1,241	128,853	116,691	245,545
6	Harlow	19,945	4,289	2,752	1,320	26,093	10,956	2,895	1,978	207	754	21,738	21,820	114,747	285,912	400,659
7	Enfield Retail Parks	887	1,968	5,801	4,725	1,050	7,514	23,067	30,532	2,293	319	351	316	78,825	37,874	116,699
8	Welwyn Garden City	4,528	3,192	4,540	302	2,741	1,227	0	3,659	13,115	10,375	19,354	14,721	77,754	147,356	225,109
9	London West End	616	734	530	138	1,170	3,844	5,034	4,650	1,797	1,460	2,876	1,982	24,830	6,389,261	6,414,091
10	Hertford	2,090	135	387	138	315	0	1,089	114	58	8,062	16,427	9,426	38,242	177,161	215,403
11	Stevenage	206	114	0	184	274	0	0	0	1,668	2,947	18,329	2,342	26,065	355,923	381,988
12	Lakeside	534	328	662	421	2,265	5,803	1,098	463	0	520	0	444	12,537	597,100	609,637
13	Hatfield	384	237	401	107	0	0	1,098	661	2,082	1,241	5,512	1,395	13,119	247,773	260,892
14	Watford	0	101	163	0	0	0	438	2,779	1,059	94	0	827	5,460	675,507	680,967
15	Bluewater	206	232	140	0	475	1,366	289	1,283	0	146	415	525	5,078	677,615	682,694
	Sub-Total	63,315	51,076	74,697	93,773	45,420	71,244	109,477	116,584	37,384	31,086	109,075	78,449	881,580	9,725,236	10,606,817
	Other	16,103	13,935	11,053	24,111	12,292	48,959	43,602	26,690	28,843	12,195	35,940	17,769	291,492	-	291,492
	TOTAL	79,417	65,011	85,750	117,885	57,712	120,204	153,079	143,274	66,227	43,281	145,015	96,218	1,173,073	9,725,236	10,898,309

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

IMPACT: CAUTIOUS GROWTH SCENARIO

**TABLE 11
IMPACT OF 50,000 SQM GROSS (35,000 SQM NET) BROOKFIELD SCHEME ON TOWN CENTRE TURNOVER**

	TURNOVER 2009 (£000) BASE POSITION	TURNOVER 2018 (£000) NO NEW DEVELOPMENT	TURNOVER 2018 (£000) WITH BROOKFIELD PROPOSALS	IMPACT OF BROOKFIELD ON TURNOVER 2018 (£000)	
	£000	£000	£000	£000	%
Brookfield	81,235	102,936	266,446	163,510	158.8
Waltham Cross	64,182	80,403	74,815	-5,588	-7.0
Hoddesdon	16,634	21,214	20,479	-735	-3.5
Cheshunt	9,177	11,597	11,393	-204	-1.8
Enfield	211,509	267,000	245,545	-21,455	-8.0
Harlow	343,439	436,644	400,659	-35,985	-8.2
Enfield Retail Parks	99,709	125,421	116,699	-8,723	-7.0
Welwyn Garden City	188,426	239,398	225,109	-14,288	-6.0
London West End	5,076,663	6,427,539	6,414,091	-13,448	-0.2
Hertford	173,395	220,542	215,403	-5,139	-2.3
Stevenage	304,115	385,570	381,988	-3,582	-0.9
Lakeside	486,495	615,773	609,637	-6,137	-1.0
Hatfield	207,501	262,851	260,892	-1,959	-0.7
Watford	538,119	681,261	680,967	-293	0.0
Bluewater	540,054	683,745	682,694	-1,052	-0.2
OTHER	260,648	328,519	291,492	-37,027	-11.3
TOTAL	8,601,303	10,890,413	10,898,309	-	-

APPENDIX 14

IMPACT: SALES DENSITY SCENARIO TESTING

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

IMPACT: CAUTIOUS GROWTH WITH SALES DENSITY SCENARIO TESTING

TABLE 1
SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	2009	2013	2018	2023	2026
1	EN11 0/8/9	20,526	21,208	21,811	22,555	22,940
2	EN 10 6/7	15,909	16,343	16,909	17,415	17,680
3	EN 7 5/6	21,428	22,109	22,960	23,774	24,250
4	EN 8 0/7/8/9	33,255	34,038	35,008	35,957	36,533
5	CM 19 5, EN 9 2	13,734	14,377	15,149	15,660	15,952
6	EN 9 1/2, 1G 10 4, E4 7	31,655	31,744	31,935	32,402	32,708
7	EN 3 4/5/6/7	48,538	50,435	52,501	54,535	55,905
8	EN 2 8/9, EN1 1/3/4, EN 2 0/6/7	67,715	68,789	70,093	71,398	72,422
9	EN 6 1/4/5	15,450	15,547	15,802	16,127	16,285
10	SG 13 8, AL 9 6, SG 14 1	10,043	10,371	10,883	11,324	11,539
11	SG 14 2/3, SG 12 0/7	34,547	35,903	37,399	38,869	39,643
12	SG 13 7, SG 12 8/9	22,112	23,167	24,504	25,814	26,453
TOTAL		334,912	344,031	354,954	365,830	372,310

SOURCE: Experian Business Solutions, September 2009

TABLE 1A
POPULATION GROWTH RATES

2009-2013 (%)	2009-2018 (%)	2009-2023 (%)	2009-2026 (%)
3.3	6.3	9.9	11.8
2.7	6.3	9.5	11.1
3.2	7.1	10.9	13.2
2.4	5.3	8.1	9.9
4.7	10.3	14.0	16.1
0.3	0.9	2.4	3.3
3.9	8.2	12.4	15.2
1.6	3.5	5.4	7.0
0.6	2.3	4.4	5.4
3.3	8.4	12.8	14.9
3.9	8.3	12.5	14.8
4.8	10.8	16.7	19.6
2.7	6.0	9.2	11.2

BROXBOURNE BOROUGH COUNCIL RETAIL STUDY UPDATE 2009

IMPACT: CAUTIOUS GROWTH WITH SALES DENSITY SCENARIO TESTING

TABLE 2
COMPARISON GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2007 PRICES)

GROWTH IN PER CAPITA RETAIL EXPENDITURE:														
3.8% pa 2007-2008														
1.1% pa 2008-2009														
1.5% pa 2009-2013														
2.8% pa 2013-2018														
4.7% pa 2018-2026														
2007		2008		2009		2013		2018		2023		2026		
Minus SFT at 6.2%		Minus SFT at 6.3%		Minus SFT at 6.5%		Minus SFT at 8%		Minus SFT at 8.5%		Minus SFT at 8.5%		Minus SFT at 8.5%		
ZONE														
1	3,112	2,919	3,230	3,027	3,266	3,054	3,466	3,189	3,979	3,641	5,007	4,581	5,746	5,258
2	3,286	3,082	3,411	3,196	3,448	3,224	3,660	3,367	4,202	3,845	5,287	4,837	6,068	5,552
3	3,192	2,994	3,313	3,105	3,350	3,132	3,555	3,271	4,082	3,735	5,135	4,699	5,894	5,393
4	2,878	2,700	2,987	2,799	3,020	2,824	3,206	2,949	3,680	3,367	4,630	4,237	5,314	4,863
5	3,256	3,054	3,380	3,167	3,417	3,195	3,627	3,336	4,164	3,810	5,238	4,793	6,012	5,501
6	3,217	3,018	3,339	3,129	3,376	3,157	3,583	3,296	4,114	3,764	5,176	4,736	5,940	5,435
7	2,492	2,337	2,587	2,424	2,615	2,445	2,776	2,554	3,187	2,916	4,009	3,668	4,602	4,210
8	1,747	1,639	1,813	1,699	1,833	1,714	1,946	1,790	2,234	2,044	2,811	2,572	3,226	2,952
9	3,582	3,360	3,718	3,484	3,759	3,515	3,990	3,671	4,580	4,191	5,763	5,273	6,614	6,052
10	3,399	3,188	3,528	3,306	3,567	3,335	3,786	3,483	4,346	3,977	5,468	5,004	6,276	5,743
11	3,314	3,109	3,440	3,223	3,478	3,252	3,691	3,396	4,238	3,878	5,332	4,878	6,119	5,599
12	3,356	3,148	3,484	3,264	3,522	3,293	3,738	3,439	4,291	3,927	5,399	4,940	6,197	5,670

Source: Experian Business Strategies and Expenditure Data for Broxbourne, September 2009

TABLE 3
SURVEY AREA COMPARISON GOODS RETAIL EXPENDITURE FORECASTS

ZONE	2009	2013	2018	2023	2026
	(£000)	(£000)	(£000)	(£000)	(£000)
1	62,676	67,630	79,417	103,327	120,616
2	51,294	55,030	65,011	84,241	98,157
3	67,113	72,316	85,750	111,712	130,782
4	93,909	100,382	117,885	152,338	177,643
5	43,877	47,968	57,712	75,060	87,755
6	99,920	104,644	120,204	153,446	177,778
7	118,683	128,790	153,079	200,058	235,381
8	116,075	123,144	143,274	183,617	213,765
9	54,302	57,065	66,227	85,038	98,557
10	33,495	36,122	43,281	56,661	66,266
11	112,337	121,922	145,015	189,622	221,969
12	72,813	79,670	96,218	127,529	149,993
TOTAL	926,495	994,682	1,173,073	1,522,648	1,778,662

Source: Tables 1&2

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

IMPACT: CAUTIOUS GROWTH WITH SALES DENSITY SCENARIO TESTING

**TABLE 4
COMPARISON GOODS ALLOCATION 2009 - NO NEW DEVELOPMENT
% MARKET SHARE**

	Retail Location	ZONE 1 %	ZONE 2 %	ZONE 3 %	ZONE 4 %	ZONE 5 %	ZONE 6 %	ZONE 7 %	ZONE 8 %	ZONE 9 %	ZONE 10 %	ZONE 11 %	ZONE 12 %
1	Brookfield	10.4	18.3	18.4	19.8	4.7	6.2	3.4	2.0	4.9	3.8	5.3	8.1
2	Waltham Cross	1.8	5.3	13.6	21.4	2.9	12.7	5.0	3.8	2.2	0.4	1.1	1.3
3	Hoddesdon	12.6	5.4	1.2	0.0	2.7	0.3	0.2	0.3	0.3	0.2	1.4	1.7
4	Cheshunt	0.0	2.6	3.7	4.0	0.2	0.7	0.0	0.0	0.4	0.0	0.0	0.9
5	Enfield	1.1	2.0	11.0	6.1	1.5	4.7	37.9	41.1	7.6	1.7	0.7	1.3
6	Harlow	35.2	17.5	6.5	6.2	50.3	12.4	1.9	2.0	0.3	2.4	15.2	26.5
7	Enfield Retail Parks	1.2	3.3	8.1	7.7	1.8	6.9	16.1	21.8	3.5	0.7	0.2	0.3
8	Welwyn Garden City	6.5	8.2	9.8	1.3	4.8	1.0	0.0	2.6	21.7	25.6	14.6	18.0
9	London West End	2.2	5.6	2.3	0.4	2.4	6.0	3.3	3.5	4.9	4.0	2.6	3.3
10	Hertford	3.0	0.9	0.5	0.4	0.5	0.0	0.7	0.1	0.1	20.2	13.1	10.7
11	Stevenage	0.3	0.2	0.0	0.3	0.5	0.0	0.0	0.0	2.8	7.1	14.4	2.9
12	Lakeside	1.1	1.2	4.0	2.0	4.0	5.3	0.7	0.3	0.0	1.2	0.0	0.5
13	Hatfield	0.5	0.6	1.0	0.3	0.0	0.0	0.7	0.5	3.8	3.2	3.9	1.9
14	Watford	0.0	0.3	0.2	0.0	0.0	0.0	0.3	1.9	1.9	0.2	0.0	0.9
15	Bluewater	0.3	1.0	0.8	0.0	0.9	1.1	0.2	0.9	0.0	0.3	0.3	0.5
	Sub-Total	76.2	72.3	80.9	69.8	77.2	57.3	70.4	80.9	54.4	71.2	72.8	78.9
	Other	23.8	27.7	19.1	30.2	22.8	42.7	29.6	19.1	45.6	28.8	27.2	21.1
	TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

IMPACT: CAUTIOUS GROWTH WITH SALES DENSITY SCENARIO TESTING

**TABLE 5
COMPARISON GOODS ALLOCATION 2009 - NO NEW DEVELOPMENT
SPEND (£000)**

	Retail Location	ZONE 1 £000	ZONE 2 £000	ZONE 3 £000	ZONE 4 £000	ZONE 5 £000	ZONE 6 £000	ZONE 7 £000	ZONE 8 £000	ZONE 9 £000	ZONE 10 £000	ZONE 11 £000	ZONE 12 £000	TOTAL	TRADE DRAW FROM BEYOND ZONE 1-12 £000	TOTAL TURNOVER £000
1	Brookfield	6,524	9,382	12,354	18,575	2,058	6,172	4,037	2,304	2,658	1,283	5,913	5,913	77,174	4,062	81,235
2	Waltham Cross	1,153	2,741	9,110	20,062	1,272	12,694	5,972	4,452	1,219	145	1,197	955	60,973	3,209	64,182
3	Hoddesdon	7,925	2,763	773	0	1,166	323	196	375	169	68	1,626	1,249	16,634	0	16,634
4	Cheshunt	0	1,343	2,477	3,782	77	665	0	0	190	0	0	643	9,177	0	9,177
5	Enfield	709	1,017	7,362	5,747	642	4,718	44,972	47,708	4,134	579	818	939	119,346	92,163	211,509
6	Harlow	22,068	8,995	4,329	5,819	22,062	12,384	2,245	2,362	169	798	17,119	19,275	117,624	225,814	343,439
7	Enfield Retail Parks	742	1,687	5,410	7,187	798	6,902	19,089	25,344	1,880	247	272	239	69,797	29,913	99,709
8	Welwyn Garden City	4,071	4,222	6,598	1,219	2,084	1,020	0	2,964	11,776	8,564	16,388	13,138	72,045	116,382	188,426
9	London West End	1,356	2,850	1,546	354	1,055	5,948	3,903	4,071	2,671	1,344	2,925	2,388	30,411	5,046,252	5,076,663
10	Hertford	1,898	441	303	354	240	0	845	93	47	6,774	14,679	7,800	33,473	139,922	173,395
11	Stevenage	163	90	0	269	208	0	0	0	1,539	2,388	16,222	2,128	23,007	281,109	304,115
12	Lakeside	670	593	2,693	1,924	1,777	5,282	851	375	0	402	0	336	14,904	471,591	486,495
13	Hatfield	303	320	662	269	0	0	851	536	2,049	1,068	4,340	1,411	11,809	195,692	207,501
14	Watford	0	147	128	0	0	0	339	2,251	1,039	72	0	626	4,602	533,517	538,119
15	Bluewater	163	517	545	0	417	1,135	224	1,039	0	113	321	398	4,872	535,182	540,054
	Sub-Total	47,745	37,107	54,290	65,562	33,857	57,243	83,526	93,874	29,542	23,846	81,819	57,435	665,847	7,674,807	8,340,655
	Other	14,931	14,187	12,823	28,347	10,020	42,677	35,158	22,200	24,760	9,649	30,518	15,378	260,648	-	260,648
	TOTAL	62,676	51,294	67,113	93,909	43,877	99,920	118,683	116,075	54,302	33,495	112,337	72,813	926,495	7,674,807	8,601,303

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

IMPACT: CAUTIOUS GROWTH WITH SALES DENSITY SCENARIO TESTING

**TABLE 6
COMPARISON GOODS ALLOCATION 2018 - NO NEW DEVELOPMENT
SPEND (£000)**

	Retail Location	ZONE 1 £000	ZONE 2 £000	ZONE 3 £000	ZONE 4 £000	ZONE 5 £000	ZONE 6 £000	ZONE 7 £000	ZONE 8 £000	ZONE 9 £000	ZONE 10 £000	ZONE 11 £000	ZONE 12 £000	TOTAL	TRADE DRAW FROM BEYOND ZONE 1-12 £000	TOTAL TURNOVER £000
1	Brookfield	8,267	11,891	15,785	23,318	2,707	7,424	5,207	2,844	3,242	1,658	7,633	7,813	97,789	5,147	102,936
2	Waltham Cross	1,461	3,473	11,640	25,184	1,674	15,271	7,703	5,496	1,486	187	1,546	1,261	76,383	4,020	80,403
3	Hoddesdon	10,042	3,502	988	0	1,534	389	253	463	207	88	2,099	1,650	21,214	0	21,214
4	Cheshunt	0	1,702	3,164	4,747	102	800	0	0	232	0	0	849	11,597	0	11,597
5	Enfield	899	1,290	9,406	7,215	844	5,676	58,005	58,887	5,041	748	1,056	1,241	150,308	116,691	267,000
6	Harlow	27,962	11,400	5,531	7,305	29,018	14,898	2,895	2,915	207	1,031	22,098	25,471	150,732	285,912	436,644
7	Enfield Retail Parks	940	2,138	6,913	9,022	1,050	8,303	24,622	31,282	2,293	319	351	316	87,548	37,874	125,421
8	Welwyn Garden City	5,158	5,351	8,430	1,530	2,741	1,227	0	3,659	14,363	11,067	21,155	17,362	92,042	147,356	239,398
9	London West End	1,718	3,613	1,975	445	1,388	7,155	5,034	5,025	3,258	1,736	3,776	3,156	38,278	6,389,261	6,427,539
10	Hertford	2,405	559	387	445	315	0	1,089	114	58	8,754	18,949	10,307	43,381	177,161	220,542
11	Stevenage	206	114	0	337	274	0	0	1,877	3,086	20,941	2,812	2,812	29,647	355,923	385,570
12	Lakeside	849	751	3,441	2,416	2,337	6,355	1,098	463	0	520	0	444	18,673	597,100	615,773
13	Hatfield	384	406	846	337	0	0	1,098	661	2,499	1,379	5,602	1,864	15,078	247,773	262,851
14	Watford	0	186	163	0	0	0	438	2,779	1,267	94	0	827	5,753	675,507	681,261
15	Bluewater	206	655	696	0	548	1,366	289	1,283	0	146	415	525	6,130	677,615	683,745
	Sub-Total	60,498	47,030	69,367	82,301	44,532	68,863	107,732	115,871	36,029	30,813	105,619	75,897	844,554	9,717,340	10,561,894
	Other	18,919	17,981	16,383	35,584	13,180	51,340	45,346	27,403	30,198	12,468	39,395	20,321	328,519	-	328,519
	TOTAL	79,417	65,011	85,750	117,885	57,712	120,204	153,079	143,274	66,227	43,281	145,015	96,218	1,173,073	9,717,340	10,890,413

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

IMPACT: CAUTIOUS GROWTH WITH SALES DENSITY SCENARIO TESTING

**TABLE 7
GREATER BROOKFIELD PROPOSALS: COMPARISON GOODS**

	Gross (Additional) Flsp (sqm)	Net Flsp (sqm)	Co Average Sales (£ per sq m net)	Average Turnover 2018 (£000s)
GREATER BROOKFIELD PROPOSED SCHEME	50,000	35,000	5,500	192,500
TOTAL		35,000	5,500	192,500

**TABLE 8
NEW SCHEME TRADE DRAW 2018**

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	ZONE 11	ZONE 12	TOTAL ZONE 1-12	BEYOND ZONE 1-12	TOTAL
BROOKFIELD MARKET SHARE (%)	10.4	18.3	18.4	19.8	4.7	6.2	3.4	2.0	4.9	3.8	5.3	8.1	-	-	-
DRAW FROM ZONES (%)	8.0	11.5	15.2	22.9	2.5	7.6	5.0	2.8	3.3	1.6	7.3	7.3	95.0	5.0	100.0
DRAW FROM ZONES (£000)	15,461	22,233	29,275	44,017	4,878	14,625	9,567	5,459	6,298	3,040	14,011	14,011	182,875	9,625	192,500
MARKET SHARE UPLIFT (%)	19.47	34.20	34.14	37.34	8.45	12.17	6.25	3.81	9.51	7.02	9.66	14.56	-	-	-

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

IMPACT: CAUTIOUS GROWTH WITH SALES DENSITY SCENARIO TESTING

**TABLE 9
COMPARISON GOODS ALLOCATION 2018 - WITH BROOKFIELD DEVELOPMENT
% MARKET SHARE**

	Retail Location	ZONE 1 %	ZONE 2 %	ZONE 3 %	ZONE 4 %	ZONE 5 %	ZONE 6 %	ZONE 7 %	ZONE 8 %	ZONE 9 %	ZONE 10 %	ZONE 11 %	ZONE 12 %
1	Brookfield	28.9	50.8	50.8	52.8	12.7	17.7	9.3	5.6	13.9	10.5	14.4	22.0
2	Waltham Cross	1.8	4.8	13.3	18.1	2.8	12.6	4.7	3.7	2.2	0.4	0.9	1.1
3	Hoddesdon	12.5	5.1	0.9	0.0	2.7	0.3	0.2	0.3	0.3	0.2	1.3	1.6
4	Cheshunt	0.0	2.5	3.6	4.0	0.2	0.7	0.0	0.0	0.4	0.0	0.0	0.8
5	Enfield	1.1	0.7	2.7	0.7	1.5	3.4	34.7	39.7	6.8	1.4	0.7	1.3
6	Harlow	24.1	5.5	2.9	0.6	44.7	8.8	1.9	1.3	0.3	1.7	15.0	22.3
7	Enfield Retail Parks	1.1	3.0	6.6	3.6	1.8	6.2	15.0	21.3	3.5	0.7	0.2	0.3
8	Welwyn Garden City	5.6	4.6	4.8	0.2	4.8	1.0	0.0	2.6	19.6	23.8	13.2	15.0
9	London West End	0.6	0.7	0.4	0.1	2.0	2.9	3.3	3.2	2.5	3.3	1.9	1.9
10	Hertford	2.6	0.1	0.5	0.1	0.5	0.0	0.7	0.1	0.1	18.5	11.2	9.7
11	Stevenage	0.3	0.2	0.0	0.1	0.5	0.0	0.0	0.0	2.5	6.8	12.5	2.4
12	Lakeside	0.6	0.4	0.4	0.2	3.9	4.8	0.7	0.3	0.0	1.2	0.0	0.5
13	Hatfield	0.5	0.3	0.4	0.1	0.0	0.0	0.7	0.5	3.1	2.8	3.8	1.4
14	Watford	0.0	0.1	0.2	0.0	0.0	0.0	0.3	1.9	1.6	0.2	0.0	0.9
15	Bluewater	0.3	0.3	0.1	0.0	0.8	1.1	0.2	0.9	0.0	0.3	0.3	0.5
	Sub-Total	80.1	79.2	87.7	80.5	78.9	59.5	71.6	81.4	56.7	71.9	75.5	81.8
	Other	19.9	20.8	12.3	19.5	21.1	40.5	28.4	18.6	43.3	28.1	24.5	18.2
	TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

IMPACT: CAUTIOUS GROWTH WITH SALES DENSITY SCENARIO TESTING

**TABLE 10
COMPARISON GOODS ALLOCATION 2018 - WITH BROOKFIELD DEVELOPMENT
SPEND (£000)**

	Retail Location	ZONE 1 £000	ZONE 2 £000	ZONE 3 £000	ZONE 4 £000	ZONE 5 £000	ZONE 6 £000	ZONE 7 £000	ZONE 8 £000	ZONE 9 £000	ZONE 10 £000	ZONE 11 £000	ZONE 12 £000	TOTAL	TRADE DRAW FROM BEYOND ZONE 1-12 £000	TOTAL TURNOVER £000
1	Brookfield	22,955	33,012	43,596	62,271	7,341	21,318	14,295	8,030	9,225	4,546	20,943	21,124	268,657	14,140	282,797
2	Waltham Cross	1,461	3,101	11,395	21,302	1,634	15,098	7,169	5,341	1,441	187	1,347	1,068	70,543	3,713	74,256
3	Hoddesdon	9,926	3,315	743	0	1,534	389	253	463	207	88	1,901	1,586	20,405	0	20,405
4	Cheshunt	0	1,656	3,103	4,663	102	800	0	0	232	0	0	817	11,373	0	11,373
5	Enfield	899	451	2,315	800	844	4,028	53,080	56,907	4,491	596	1,056	1,241	126,708	116,691	243,399
6	Harlow	19,144	3,577	2,474	722	25,800	10,562	2,895	1,884	207	727	21,702	21,455	111,149	285,912	397,061
7	Enfield Retail Parks	882	1,951	5,690	4,296	1,050	7,435	22,912	30,457	2,293	319	351	316	77,953	37,874	115,826
8	Welwyn Garden City	4,465	2,976	4,151	180	2,741	1,227	0	3,659	12,991	10,306	19,174	14,457	76,325	147,356	223,681
9	London West End	506	446	386	107	1,148	3,512	5,034	4,612	1,651	1,432	2,786	1,864	23,486	6,389,261	6,412,746
10	Hertford	2,059	93	387	107	315	0	1,089	114	58	7,993	16,175	9,338	37,728	177,161	214,889
11	Stevenage	206	114	0	168	274	0	0	0	1,648	2,933	18,068	2,295	25,707	355,923	381,630
12	Lakeside	502	285	384	221	2,257	5,748	1,098	463	0	520	0	444	11,923	597,100	609,023
13	Hatfield	384	220	357	84	0	0	1,098	661	2,040	1,227	5,503	1,348	12,923	247,773	260,696
14	Watford	0	93	163	0	0	0	438	2,779	1,038	94	0	827	5,431	675,507	680,938
15	Bluewater	206	189	85	0	468	1,366	289	1,283	0	146	415	525	4,973	677,615	682,588
	Sub-Total	63,596	51,481	75,230	94,921	45,509	71,482	109,651	116,655	37,520	31,114	109,420	78,704	885,283	9,726,026	10,611,309
	Other	15,821	13,530	10,520	22,964	12,203	48,721	43,427	26,619	28,707	12,168	35,594	17,514	287,789	-	287,789
	TOTAL	79,417	65,011	85,750	117,885	57,712	120,204	153,079	143,274	66,227	43,281	145,015	96,218	1,173,073	9,726,026	10,899,098

**BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009**

IMPACT: CAUTIOUS GROWTH WITH SALES DENSITY SCENARIO TESTING

**TABLE 11
IMPACT OF 50,000 SQM GROSS (35,000 SQM NET) BROOKFIELD SCHEME ON TOWN CENTRE TURNOVER**

	TURNOVER 2009 (£000) BASE POSITION	TURNOVER 2018 (£000) NO NEW DEVELOPMENT	TURNOVER 2018 (£000) WITH BROOKFIELD PROPOSALS	IMPACT OF BROOKFIELD ON TURNOVER 2018 (£000)	
	£000	£000	£000	£000	%
Brookfield	81,235	102,936	282,797	179,861	174.7
Waltham Cross	64,182	80,403	74,256	-6,147	-7.6
Hoddesdon	16,634	21,214	20,405	-809	-3.8
Cheshunt	9,177	11,597	11,373	-224	-1.9
Enfield	211,509	267,000	243,399	-23,601	-8.8
Harlow	343,439	436,644	397,061	-39,583	-9.1
Enfield Retail Parks	99,709	125,421	115,826	-9,595	-7.7
Welwyn Garden City	188,426	239,398	223,681	-15,717	-6.6
London West End	5,076,663	6,427,539	6,412,746	-14,793	-0.2
Hertford	173,395	220,542	214,889	-5,653	-2.6
Stevenage	304,115	385,570	381,630	-3,940	-1.0
Lakeside	486,495	615,773	609,023	-6,750	-1.1
Hatfield	207,501	262,851	260,696	-2,155	-0.8
Watford	538,119	681,261	680,938	-323	0.0
Bluewater	540,054	683,745	682,588	-1,157	-0.2
OTHER	260,648	328,519	287,789	-40,729	-12.4
TOTAL	8,601,303	10,890,413	10,899,098	-	-

APPENDIX 15

SURPLUS GROWTH PROJECTIONS (OVER 1.5%)

**BROXBOURNE BOROUGH COUNCIL
BRIDGING REPORT EVIDENCE BASE JULY 2010**

**CAUTIOUS GROWTH SCENARIO - SURPLUS GROWTH PROJECTIONS
50,000 SQ M GROSS**

**TABLE 1A
SURPLUS GROWTH PROJECTIONS (OVER 1.5%) POST DEVELOPMENT (£000) 2018**

	FORECAST TURNOVER 2009 BASE POSITION (£000)	FORECAST TURNOVER 2018 1.5% COMPOUND GROWTH RATE BASE POSITION (£000)	FORECAST TURNOVER 2018 BY MARKET SHARE WITH BROOKFIELD SCHEME (£000)	SURPLUS GROWTH 2018 (£000)
Brookfield	81,235	94,277	266,446	172,169
Waltham Cross	64,182	74,486	74,815	329
Hoddesdon	16,634	19,305	20,479	1,174
Cheshunt	9,177	10,650	11,393	743
Enfield	211,509	245,465	245,545	80
Harlow	343,439	398,574	400,659	2,085
Enfield Retail Parks	99,709	115,717	116,699	982
Welwyn Garden City	188,426	218,677	225,109	6,433
London West End	5,076,663	5,891,675	6,414,091	522,416
Hertford	173,395	201,232	215,403	14,171
Stevenage	304,115	352,938	381,988	29,050
Lakeside	486,495	564,597	609,637	45,040
Hatfield	207,501	240,813	260,892	20,079
Watford	538,119	624,509	680,967	56,458
Bluewater	540,054	626,755	682,694	55,938
TOTAL	8,340,655	9,679,670	10,606,817	-

**BROXBOURNE BOROUGH COUNCIL
BRIDGING REPORT EVIDENCE BASE JUNE 2010**

**CAUTIOUS GROWTH SCENARIO - SURPLUS GROWTH PROJECTIONS
HIGHER £6,000 PER SQ M NET SALES DENSITY / 50,000 SQ M GROSS**

**TABLE 1B
SURPLUS GROWTH PROJECTIONS (OVER 1.5%) POST DEVELOPMENT (£000) 2018**

	FORECAST TURNOVER 2009 BASE POSITION (£000)	FORECAST TURNOVER 2018 1.5% COMPOUND GROWTH RATE BASE POSITION (£000)	FORECAST TURNOVER 2018 BY MARKET SHARE WITH BROOKFIELD SCHEME (£000)	SURPLUS GROWTH 2018 (£000)
Brookfield	80,113	92,975	282,797	189,822
Waltham Cross	63,550	73,753	74,256	503
Hoddesdon	16,357	18,983	20,405	1,422
Cheshunt	9,026	10,475	11,373	898
Enfield	207,362	240,652	243,399	2,748
Harlow	336,704	390,759	397,061	6,302
Enfield Retail Parks	98,272	114,049	115,826	1,778
Welwyn Garden City	184,732	214,389	223,681	9,292
London West End	4,977,121	5,776,152	6,412,746	636,594
Hertford	169,995	197,286	214,889	17,603
Stevenage	298,152	346,018	381,630	35,612
Lakeside	476,956	553,526	609,023	55,496
Hatfield	203,432	236,091	260,696	24,605
Watford	527,568	612,264	680,938	68,674
Bluewater	529,465	614,466	682,588	68,123
TOTAL	8,178,806	9,491,838	10,611,309	-

APPENDIX 16

SUMMARY OF GREATER BROOKFIELD TRANSPORT METHODOLOGY

Summary of Greater Brookfield Transport Methodology

Estimating Retail Trips (Origins)

TEMPRO, a Government database, was used to establish the number of car driver trips travelling on a Saturday from each retail study zone for each year of the predicted design life of the development proposals.

Establishing Travel Patterns (Destinations)

Using data provided by GVA Grimley, these estimated trip levels were then divided up between each of the study zones, according to the predicted market shares for the 'Base' and 'Cautions' calculations in the future years (i.e. beyond 2018); therefore representing a 'Do Something' situation, once the development proposals would be expected to be operational.

For comparison, the existing (i.e. 2008) market share calculations were used as a basis for the 'Do Minimum' (i.e. no development) situation, representing the approximate spread of retail trips across the local retail offer, based on the available study zone data.

Converting Trips into Vehicle Kilometres

An estimate of total vehicle kilometres travelled from each retail study zone was calculated using an internet based route finder and multiplying the journey length by the number of predicted trips, according to each year of the predicted design life.

Using the results of the Broxbourne Shopping survey, a relationship between Car drivers, Taxi and Bus was calculated, and this factor was then applied to calculate the vehicle kilometres for each respective mode.

APPENDIX 17

DESCRIPTION OF INVENTORY STRUCTURE WITHIN EXCEL SPREADSHEETS

Description of Inventory Structure within Excel Spreadsheets

There are three spreadsheets associated with this assessment, one per scenario as follows:

- 1: Do-Minimum Scenario (D127404_AEI_DM.xls)
- 2: Base Do-Something Scenario (D127404_AEI_DS_BASE.xls)
- 3: Cautious Do-Something Scenario (D127404_AEI_DS_CAUTIOUS.xls)

Each follows the same set-up, with scenario specific data inserted into the appropriate points.

Each spreadsheet has 23 tabs. Tabs 1-21 are one for each year from the year of opening (2018) to 2038. Tab 22 is a Summary Tab. Tab 23 contains Emissions data. These tabs are detailed as follows.

Tab 2018:

The Tab begins with emission factors for each of the four pollutants under consideration. These factors are per 100 vehicles covering 1 mile, at a range of speeds from 30mph to 70mph, for cars, taxis and buses. These are calculated using the DMRB Screening Tool v1.03c.

There is then a block per Zone from which the journey originates. Firstly there is a table dividing the journey from the originating zone to one of 15 shopping sites into distance travelled (in km) at a specific speed on a specific road type.

These distances travelled are then combined with the emission factors to establish the quantity of pollutant emitted per journey per vehicle type (car, taxi or bus) on each of the road types/speeds.

These are then combined to provide an overall quantity of pollutant emitted per journey.

Total vehicle kilometres travelled from that zone to each of the shopping areas are then presented by mode of transport.

Finally the vehicle kilometres travelled, the distance per trip and total emissions per trip, per mode of transport are combined to calculate the total emissions for each journey option (from zone to each shopping destination).

These are then totalled to provide total emissions for all journeys from each zone, and totalled again to provide total emissions for all journeys for 2018.

Tabs 2019-2038:

These are as above but with emission factors for the appropriate year and vehicle kilometres as calculated for that year. For years after 2025, emission factors from 2025 are used as that is the limit of the currently available factors.

Summary tab:

This tab contains two summary sets of data.

The first is the total quantity of each pollutant emitted per year, and then totalled.

The second is the quantity of pollutant emitted in 2018 per zone (where the journey originates), and then totalled.

APPENDIX 18

SCENARIO OUTPUTS: MAGNITUDE OF EMISSIONS

Figure D1: Contribution to Annual Carbon Emissions in 2018 from Customer Shopping Journeys for Customers Living in 12 Residential Zones

Figure D2: Contribution to Annual NO_x Emissions in 2018 from Customer Shopping Journeys for Customers Living in 12 Residential Zones

Figure D3: Contribution to Annual PM₁₀ Emissions in 2018 from Customer Shopping Journeys for Customers Living in 12 Residential Zones

Figure D4: Contribution to Annual Total Hydrocarbon Emissions in 2018 from Customer Shopping Journeys for Customers Living in 12 Residential Zones

NOTES

Contribution to Annual Carbon Emissions in 2018 from Customer Shopping Journeys for Customers living in 12 Residential Zones



Revision Details	By	Date	Suffix
	GG		

Drawing Status: **FINAL**

Job Title:
**D127404
Greater Brookfield**

Drawing Title:
Contribution to Annual Carbon Emissions in 2018 from Customer Shopping Journeys for Customers living in 12 Residential Zones

Drawn	EW	Approved	GG
Stage 1 check	GG	Stage 2 check	GG
Originated	9511NM	Date	27/11/09

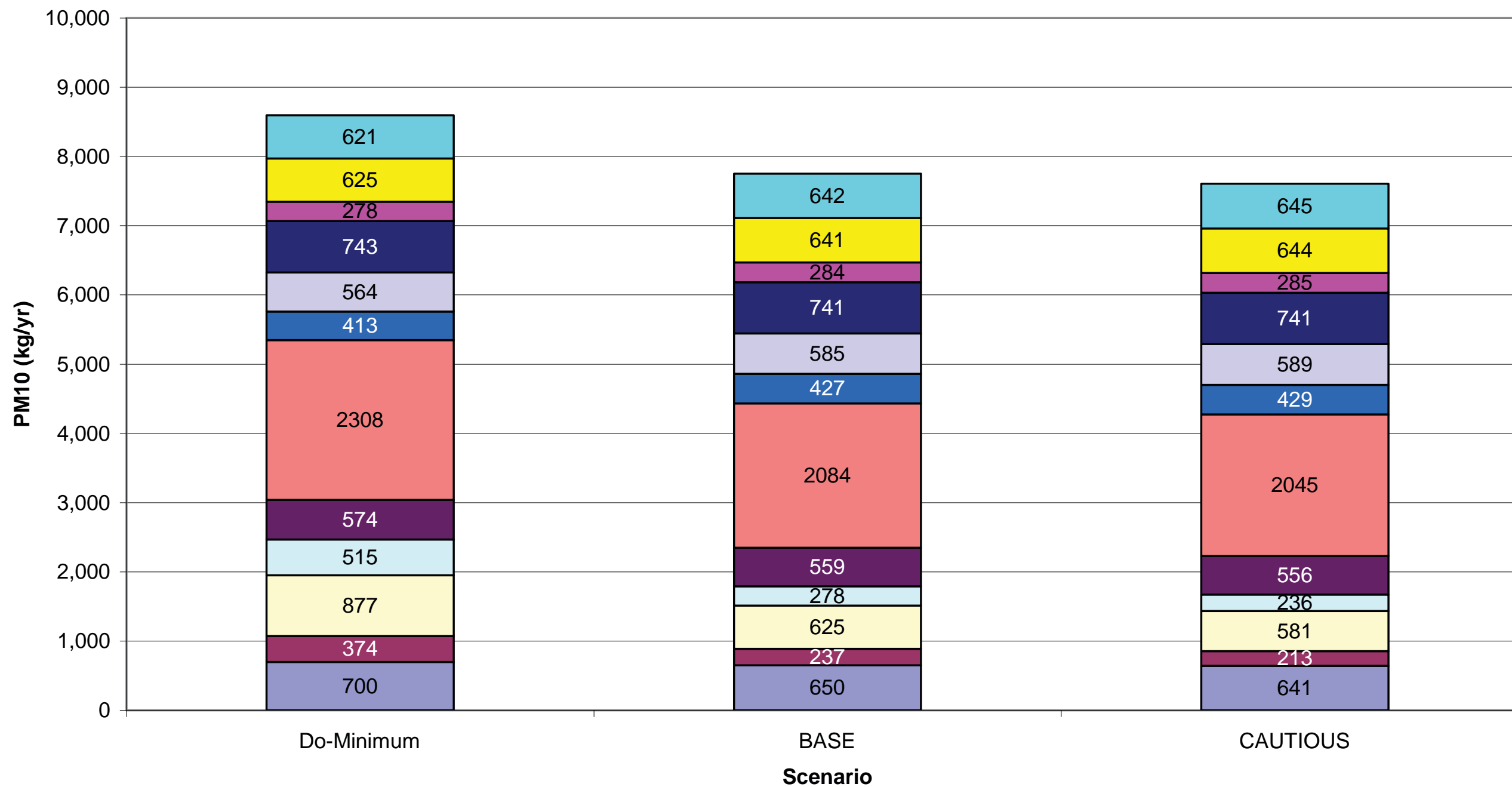
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Drawing Number: **FIGURE D1** Rev

NOTES

Contribution to Annual PM₁₀ Emissions in 2018 from Customer Shopping Journeys for Customers living in 12 Residential Zones



Revision Details	By	Date	Suffix
	GG		

Drawing Status: **FINAL**

Job Title:
**D127404
Greater Brookfield**

Drawing Title:
Contribution to Annual PM₁₀
Emissions in 2018 from Customer
Shopping Journeys for Customers
living in 12 Residential Zones

Drawn	EW	Approved	GG
Stage 1 check	GG	Stage 2 check	GG
Originated	9511NM	Date	27/11/09

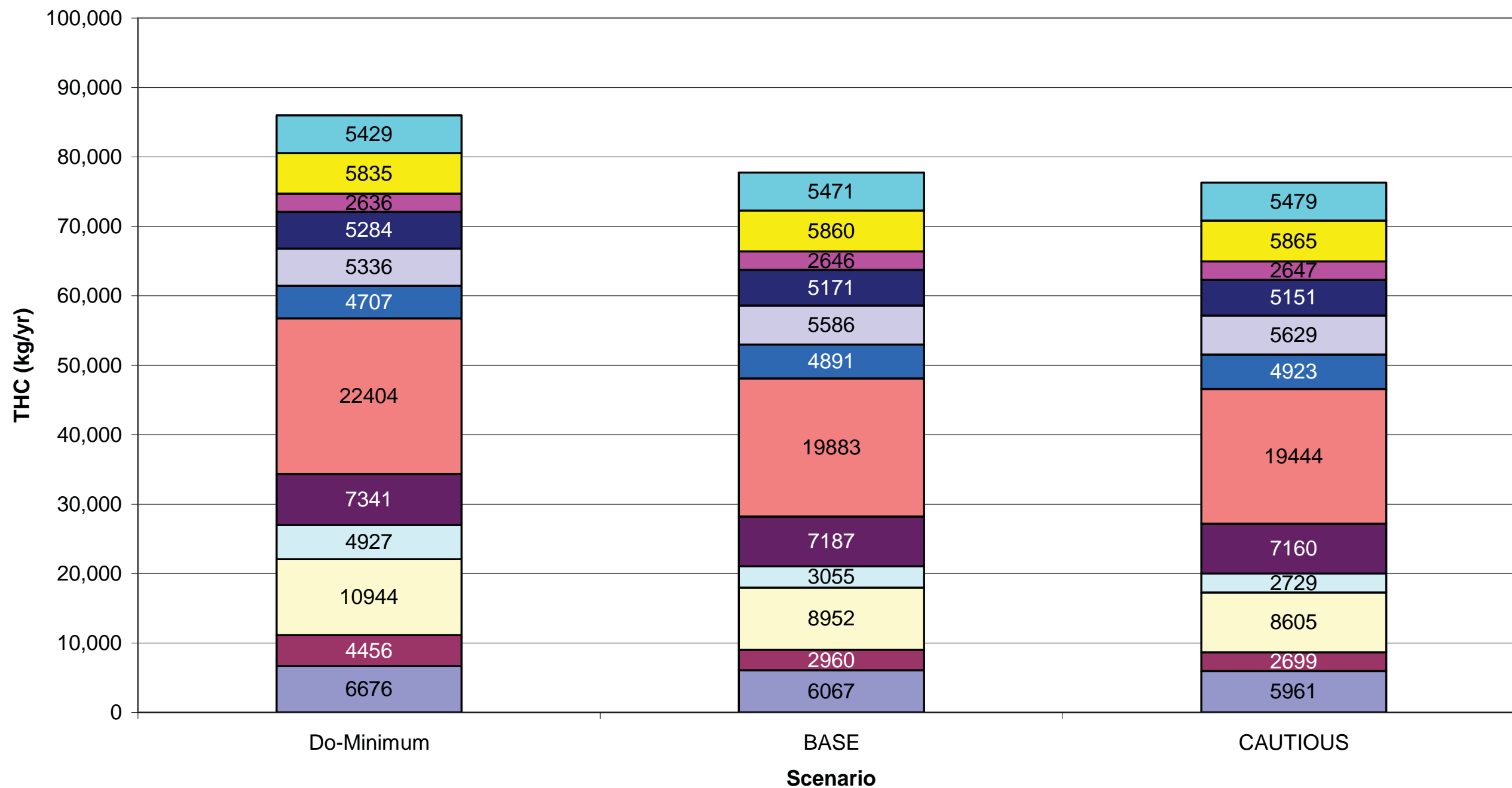
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Drawing Number: **FIGURE D3** Rev

NOTES

Contribution to Annual Total Hydrocarbon Emissions in 2018 from Customer Shopping Journeys for Customers living in 12 Residential Zones



Revision Details	By	Date	Suffix
	Check		

Drawing Status: **FINAL**

Job Title:
**D127404
Greater Brookfield**

Drawing Title:
Contribution to Annual Total Hydrocarbon Emissions in 2018 from Customer Shopping Journeys for Customers living in 12 Residential Zones

Drawn: **EW** Approved: **GG**

Stage 1 check: **GG** Stage 2 check: **GG** Originated: **9511NM** Date: **27/11/09**

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Drawing Number: **FIGURE D4** Rev

APPENDIX 19

LEISURE ASSESSMENT SUPPLEMENTARY ANALYSIS

**RETAIL AND TOWN CENTRES:
EVIDENCE BASE BRIDGING REPORT**

LEISURE ASSESSMENT

Broxbourne Borough Council

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APPENDICES

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2. BROXBOURNE LEISURE EXPENDITURE NEEDS
3. BROXBOURNE CAFÉ AND RESTAURANT NEEDS ASSESSMENT

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1. BROXBOURNE CINEMA PROVISION WITH DRIVE TIMES
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1. INTRODUCTION

1.1 In this section, we undertake a qualitative and quantitative review of existing commercial leisure provision within the Borough of Broxbourne and the wider sub-region. We also provide a commentary on the extent of the need for additional leisure floorspace within Broxbourne and the availability of sites to accommodate such development. Our methodology comprises the following steps:-

- We draw on **national trends** in the leisure market to understand the health of specific categories of commercial leisure provision. This enables us to understand the commercial need for development at the local level within Broxbourne;
- We draw on **detailed qualitative health checks and site visits** to understand the distribution and quality of existing provision. We also consider changes to future provision as a result of outstanding commitments;
- We have also **mapped** existing leisure provision to illustrate the distribution of leisure provision and to highlight where there are gaps in provision. We have demonstrated this through five and ten minute drive times plans. Although it is important to point out that people travel varying distances to visit leisure destinations, this exercise does, however, provide a useful indication of gaps and travel distances between facilities;
- We have undertaken a detailed analysis of the Broxbourne Borough Council Retail Study 2008 **household telephone survey results** to understand where people from the individually defined zones are travelling to visit existing leisure facilities both within and beyond Broxbourne. The survey provides a good indication of trade retention, leakage, and the quality of leisure provision in the Borough. This exercise enables us to highlight longer and unsustainable travel patterns, indicating gaps in provision where facilities would serve more local catchment areas;
- Quantitative methodologies for considering the need for new leisure floorspace are less developed than those for retail floorspace. To set the context of economic growth, we do, however, provide a broad summary of the overall **growth in available leisure expenditure** to demonstrate the extent of growth rates across Broxbourne;
- We have also undertaken a more detailed quantitative analysis of two sub sectors where the developed methodology allows. We are able to examine how many new **cinema screens** can be supported and based on the current market, we are able to quantify the need for new **A3/A4/A5 leisure floorspace** based on the outcome of the 2008 Retail Study quantitative retail capacity forecasting. Similar data sources and quantitative methodologies are not available for other leisure sectors such as bingo provision, which instead relies on gaps in provision, national trends and the commercial market;

- Finally, we have undertaken a **sequential site search** assessing the availability and suitability of sites for future leisure development within the centres of Cheshunt, Hoddesdon and Waltham Cross.

2. LEISURE TRENDS

- 2.1 The leisure industry has enjoyed buoyant market conditions over the last decade as a result of growing levels of disposable incomes and low unemployment. Much of the growth has been fuelled by an increase in the number of 'cash-rich, time-poor' consumers who have been prepared to pay a premium price for convenient services in order to save time. Leisure time has become a precious commodity to consumers and in order to maximise free time, consumers have often combined leisure activities as part of an overall going out experience. The range of leisure choices has also grown considerably leading to an increase in competition in the industry.
- 2.2 The recession has brought many challenges for the industry. On one hand, the industry is considered to be particularly exposed to the economic downturn due to the discretionary nature of leisure expenditure, but contrary to this leisure activities remain an important lifestyle choice for many consumers and who will prioritise leisure over other areas of spending.
- 2.3 In the following sections, we review the performance of specific sectors of the leisure industry including cinemas, bingo, ten pin bowling, health and fitness clubs, as well as bars, pubs and restaurants. We also look at the existing provision of facilities in Broxbourne's catchment area and consider the potential to enhance the current offer in the future.

3. CINEMAS

- 3.1 Cinema audiences grew significantly during the 1990s, but by the start of the current decade the growth had slowed and research by Dodona (2009) indicates that the market has reached a plateau. Table 3.1 provides a summary of key industry indicators and charts changes in revenues and screen numbers between 2003 and 2008.
- 3.2 In 2008, there were 3,610 cinema screens across the UK, of which three-quarters were multiplexes¹. The remainder are traditional cinemas that have been converted to multi-screen use, large format screens such as IMAX, and screens in mixed-use venues such as arts centres. The dominant operators are Odeon and Cineworld although since the consolidation of the industry in 2005, Vue has undertaken an aggressive building programme to try and increase their market share.

¹ Purpose-built cinema complexes with more than five screens.

Table 3.1: UK Cinema Market 2003-2008

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

Source: Dodona Research 2009

- 3.3 The cinema industry is not immune from the recession and there were some closures during 2008, the majority being art centre venues rather than high street chains. The current economic downturn has hit advertising revenues but in general the industry is considered to be in good health. Indeed, in October 2009, The Times² reported that cinemas are experiencing a boom with UK cinema admissions for the first six months of 2009 at their highest levels since 2002, whilst a report from May 2010³ found that the global box office had experienced an impressive spike in attendance of 28% on the first quarter of 2010, compared to the start of 2009. Although ticket prices have been rising, a night at the cinema is considered to represent a relatively cheap night out, especially for families.
- 3.4 Over the last couple of years, cinema operators have made considerable efforts to improve customer yields by introducing changes such as premium seating areas and enhancing the range of refreshments such as alcohol and higher quality food. Vue Cinemas introduced their 'Evolution' concept which provides a mix of seating types comprising bean bags and sofas as well as regular seats. National Amusements rolled out its 'Cinema de Lux' concept at three shopping malls in 2008, which is a high service concept with allocated leather seating, contemporary dining and concierge facilities.

² The Times 'Twist in the plot as British cinema defies the recession', October 24th 2009

³ Screendaily, International Box Office: Boom Times, 6 May 2010

- 3.5 Another development has been the introduction of 3D films, which are attracting premium ticket prices from operators. In the future, Dodona predict that operators of traditional cinemas, particularly those with only one or two screens, will find their competitive position eroded, especially if family audiences start travelling longer distances to larger cinemas to obtain the latest 3D experience.
- 3.6 Dodona Research suggests that very large cinemas have fallen out of favour. They cite Odeon's new 14 screen cinema in Liverpool, which opened in October 2008, the first cinema of this size to open since May 2004. It would appear that new cinemas are being built to serve smaller catchment areas and despite often having the same number of screens, the number of seats in each auditorium has been reduced.
- 3.7 Investment in new cinemas is continuing but this is no longer producing such high levels of growth so the focus has switched to replacing or relocating existing cinemas. There is also some investment in under-served areas, however Dodona consider this to be merely offsetting a decline in existing markets. Over the short to medium term, future cinema projects are likely to be impacted by the level of availability of finance for property developers, although it would appear that investment in better seating, better bars and cafés and new buildings is continuing. More recently in the midst of the recession, HMV announced that it was testing a three screen art-house format above its Wimbledon music store.
- 3.8 The Household Telephone Survey identifies that 704 out of a total of 1,210 respondents within the Broxbourne survey area visit cinemas. It is clear from table 3.2 that, at present, the out-of-centre Cineworld located at the Southbury Corner Leisure Park complex in Enfield has the strongest influence in the catchment area attracting 26.7% of respondents, followed by the out-of-centre Cineworld in Harlow, which attracts 11.3% of respondents.

Table 3.2: Most Dominant Cinema Destinations

Cinema	No. of Screens	No of Seats	Opening Date	Market Share
Cineworld, Enfield	15	3,392	Oct 2000	26.7%
Cineworld, Harlow	6	1,536	Apr 1991	11.3%
Cineworld, Stevenage	16	3,013	Dec 1996	6.3%
Odeon, Hatfield	9	2,013	Sep 1991	3.9%
Odeon, Picketts Lock, Lee Valley	12	2,684	Feb 1994	3.3%
Broxbourne Hall, Hoddesdon	1	564	-	1.1%
London West End	Various	-	-	0.4%

Source: Household Telephone Survey, April 2008 and Dodona, 2009

- 3.9 To supplement our qualitative assessment, we have produced a gap analysis plan (Plan 1) illustrating five and ten minute drive times from cinema provision in the wider sub region. It is clear that the sub region is relatively well represented in terms of cinema screens with cinemas in each of the dominant town centres.

- 3.10 Cinema provision within the Borough of Broxbourne is more limited. The only screen is run by the Council in Broxbourne Civic Hall in Hoddesdon. This does not compete on a like for like basis with surrounding multiplexes and it would appear that there is a potential gap in the market within Broxbourne for a multiplex cinema. This is reinforced by the results of the household telephone survey, which indicates that residents are currently travelling to cinemas in Enfield and Harlow which are not local to them. The area to the east of Broxbourne and around Waltham Abbey also appears to be underserved.
- 3.11 In order to build on our qualitative findings, we have undertaken a quantitative need assessment for new cinemas within Broxbourne's catchment area, which broadly comprises the Borough of Broxbourne and Zones 5 to 12 which cover the wider sub-region. The methodology compares the average population per screen in the UK, with the population per screen in the catchment area. The shortfall highlights the need for new screens to bring Broxbourne back in line with the national average. The analysis also forecasts to 2026 taking into consideration population forecasts and the consequent growth in the need for cinema screens based on information and projections provided by Dodona 2009.
- 3.12 From table 3.3 it is evident that the only mainstream cinema within Broxbourne's catchment area is the 15 screen Cineworld in Enfield. There are two further screens operated by local authorities; one at Broxbourne Civic Hall in Hoddesdon and one at the Wyllyotts Centre in Potters Bar. We estimate that Broxbourne Civic Hall draws all of its trade from within the catchment area. Whereas, we estimate that Enfield Cineworld and the Wyllyotts Centre draw approximately 20% of their trade from within Broxbourne's catchment area, as a result of their location within the survey area. This exercise suggests that Broxbourne is currently served by 17 cinema screens.

Table 3.3: Number of Cinema Screens Serving Broxbourne Catchment Area

Cinema	Town	No. of Screens	% of Catchment Overlap*	Screens Serving Broxbourne Borough**
Cineworld	Enfield	15	20	3
Broxbourne Civic Hall	Hoddesdon	1	100	1
Wyllyotts Centre	Potters Bar	1	20	0.2
TOTAL	-	17	-	4.2

Source: Cinemagoing 18, Dodona Research 2009

* Some cinema screens will serve population living beyond the catchment area. This % reflects the proportion of screens serving the population living within Broxbourne survey area/catchment area.

** This figure demonstrates the number of screens serving the population living within the Broxbourne survey area. The remaining screens will serve population living beyond the survey area.

- 3.13 Table 3.4 outlines the population per screen in the UK and in Zones 1 to 12 of the catchment area in 2008 and projects this forward to 2013, 2018, 2023 and 2026, based on population growth and the subsequent number of screens needed to serve the total population. It should be noted that the average number of people per cinema screen can vary widely, as a result of factors such as relative affluence and demographics.
- 3.14 Although Dodona predict that the number of cinema screens will decline over the period to 2013, we believe that the cinema market will experience longer term growth and we therefore assume that cinema screens will grow by 2% per annum post 2014. It is evident that in Broxbourne's catchment area there are more people per screen than the national average, suggesting a deficiency in cinema provision and/or a likelihood that residents are using facilities situated outside of the catchment area.

Table 3.4: Population Per Screen

	Estimated Population (m)	No. of Screens	Population Per Screen
UK (2008)	62.89	3,610	17,421
Broxbourne Catchment Area (2008)	0.335	4.2	79,741
UK (2013)	64.05	3,650	17,822
Broxbourne Catchment Area - 2013	0.344	4.2	81,912
UK (2018)	65.69	4,030	15,564
Broxbourne Catchment Area - 2018	0.355	4.2	84,513
UK (2023)	67.89	4,362	18,600
Broxbourne Catchment Area - 2023	0.366	4.2	87,102
UK (2026)	69.12	4,629	14,932
Broxbourne Catchment Area - 2026	0.372	4.2	88,645

Source: GVA Grimley, Appendix 1. NB – Broxbourne Catchment Area comprises the telephone survey area, Zones 1 to 12.

- 3.15 Table 3.5 draws on the comparison with the UK average and illustrates the capacity for additional cinema provision within Broxbourne's catchment area. On this basis, our assessment highlights capacity for an additional 15 cinema screens within the Broxbourne catchment area up to 2013, rising to 21 screens in 2026. This suggests that a small to medium sized multiplex cinema could be supported within the Borough on the basis that there are currently no commitments for new cinemas in the Borough or the wider sub-region.

Table 3.5: Capacity for Additional Cinema Provision in Broxbourne Catchment Area

	Catchment Area Population (m)	UK Population Per Screen	Cinemas Necessary to Match UK Average	Shortfall of Cinema Screens in Broxbourne
2008	0.335	17,421	19	15
2013	0.334	17,822	19	15
2018	0.355	16,301	22	18
2023	0.366	15,564	24	19
2026	0.372	14,932	25	21

Source: GVA Grimley, Appendix 1

4. BINGO

- 4.1 Bingo is one of the oldest forms of gambling in the UK and has traditionally had a downmarket image limiting its appeal as a night out for the majority of the population. The typical bingo player has been perceived as lower income, female and from the older demographic. However, over the last decade, the market saw a rise in the number of younger and more affluent players and deregulation allowed clubs to offer bigger prizes.
- 4.2 Nevertheless, more recent research by Mintel (2007) highlights that the industry has experienced a fall in revenues and admissions as a result of legislative changes such as the ban on smoking in public places and the rise of online gambling. The recession has also hit the market and although operators have attempted to diversify their offer to halt the decline in participation rates, it would appear that this has merely slowed the decline and operators continue to struggle in tough market conditions.
- 4.3 We have reviewed bingo provision throughout the Broxbourne catchment area. It is clear from the gap analysis plan (Plan 2) that Broxbourne is relatively poorly provided for in terms of bingo destinations with the only bingo hall being the Gala Bingo in Waltham Cross town centre. Outside of the Borough, there is a Mecca Bingo in Harlow, a Gala Bingo in Enfield and a bingo hall in Hatfield.
- 4.4 It is unlikely that there will be market demand for a new bingo hall in Broxbourne as a result of the economic downturn, however this could change and if there are suitable sites available, then an additional bingo hall could fill a gap in the northern part of the Borough.

5. TEN-PIN BOWLING

- 5.1 Tenpin bowling has been established as a commercial leisure activity in the UK for over 40 years, but after a period of growth in the 1980s, decline set in during the early 1990s. Since then, however, a spate of investment in new centres and refurbishments by recognised chain brands has revitalised the industry and ten pin bowling remains a strong family activity.
- 5.2 Mintel research (2006) state that recently, high-end, centralised venues have started to emerge, but the question remains whether this can dispel the lingering sense among many that bowling is either passé or too child, or youth-orientated, whilst offering only basic refreshments. It would appear that it is down to the market and investor confidence to decide, although the concept is already beginning to evolve to generate customer demand. For example, the Bloomsbury Bowl Lanes in Bloomsbury offers a 50s American themed bowling venue with ancillary karaoke rooms, venue rooms for hire, DJ booths, bars, small scale cinema and a venue for bands and live performers/comedy nights.
- 5.3 We have produced a gap analysis plan (Plan 3) illustrating five and ten minute drive times from ten-pin bowling locations in Broxbourne's catchment area. There are no ten-pin bowling alleys in the Borough of Broxbourne. The closest facilities are a First Bowl in Harlow, Lakeside Superbowl in Bishops Stortford and Hollywood Bowl in Stevenage. There are also no facilities in Welwyn Garden City, Hatfield, Potters Bar or Enfield. It is clear from our analysis that Broxbourne could support a ten-pin bowling provision to generate more sustainable travel patterns and to fill a gap in the north London fringe.

6. HEALTH & FITNESS CLUBS

- 6.1 According to Mintel's report on *Health and Fitness Clubs – UK (May 2003)*, between 1998 and 2002 the value of the private health and fitness club market increased by 62% at current prices; in real terms the growth was still substantial at 49%. Mintel recognise changes in sporting fashions, which have shifted away from competitive sports towards those focused on personal health and fitness development.
- 6.2 It is now apparent that the health and fitness sector was struggling long before the onset of the current economic downturn, although it is clear that the recession has compounded some of the problems faced by the industry such as falling membership rates. The Esporta chain was one of the most high profile casualties and was placed into administration in 2008. However, the Esporta business failed to sell and it is understood that it has been taken out of administration by its main creditor, who is trading the business until a buyer can be found. The number of new openings in the sector was static in 2008 and proposed openings have fallen sharply in 2009, with commentators predicting that many projects are likely to be shelved.

- 6.3 Nevertheless, there is evidence that value and budget operators are entering the health and fitness market and are actively looking to expand their businesses throughout the UK. This new breed of clubs aims to appeal to a wider market with subscriptions typically at £10 to £20 month. It is apparent that there will be sacrifices to the quality of the offer but that this offer is well suited to financially uncertain times.
- 6.4 We have produced a gap analysis plan (Plan 4) to review the provision of both public and privately operated health and fitness clubs within the Borough of Broxbourne and the wider sub-region. The assessment indicates that there is a good coverage in terms of five and ten minute drive times across the catchment area. Outside of the Borough, there is a good selection of public and privately operated health and fitness facilities in the centres of Bishops Stortford, Harlow, Hertford, Hatfield, Welwyn Garden City, Stevenage and in Enfield.
- 6.5 Within the Borough, there are three leisure facilities operated by the Council. The Grundy Park Leisure Centre is located on the edge of Cheshunt town centre and includes a 25 metre swimming pool, as well as a gym, sports hall, squash courts and two third generation five-a-side football pitches. Goffs Sports and Arts Centre is also located in Cheshunt and incorporates a flood lit Astroturf pitch, tennis and netball courts, a sports hall and a performing arts centre. Finally, the John Warner Sports Centre is located in Hoddesdon and provides a 25 metre swimming pool, a sports hall, a gym and several outdoor games areas.
- 6.6 There are no health and fitness facilities within the Borough of Broxbourne that are run by the main national private operators, which is surprising given the growth in the industry over the last decade. We consider that could be capacity for at least one privately operated health and fitness operator within the Borough. In light of current economic circumstances, it is likely that market demand will be from a mid range or budget operator.

7. PUBS/CLUBS

- 7.1 The pub industry continues to suffer from the recession with a record number of pub closures across the UK as a direct consequence of a decline in both drinks sales and rental revenues. Other factors such as competition from the supermarkets, changes to licensing legislation and the smoking ban have further compounded the problems faced by many operators. Many of the large national pub chains have faced difficulties and there have been cases of administration. However, on the plus side, this has meant that smaller multiples have been able to acquire premium sites at bargain prices and value led brands such as JD Wetherspoon have achieved significant sales growth and continue to expand.
- 7.2 It is evident from the Household Survey results that just over half of respondents visit pubs and clubs. Taking the catchment area as a whole, Enfield and Hertford are the most popular destinations with a market share of 9.8% and 9.7% respectively. Other popular destinations include London's West End,

Cheshunt, Hoddesdon, Waltham Abbey and Ware. It is clear that a relatively high proportion of trade is leaking to centres outside of the Borough, which points to a need to improve facilities within Broxbourne.

Table 7.1: Most Dominant Pub/Club Destinations

Pub/Club Destination	Market Share
Enfield	9.8%
Hertford	9.7%
Other	4.7%
London West End	3.3%
Cheshunt	3.1%
Hoddesdon	2.8%
Waltham Abbey	2.3%
Ware	2.3%
Harlow	1.5%
Waltham Cross	1.2%
Kingston	2.0%
Don't Visit	49.3%
Don't Know / Varies	4.4%

Source: Household Telephone Survey, April 2008

- 7.3 Hoddesdon has a reasonable range of pubs and restaurants and we understand from the Council that the offer has improved in recent years. It is evident from the household telephone survey that 29.4% of respondents in Zone 1 visit Hoddesdon most often for pubs/clubs and 12.7% visit for evening entertainment. The role of the evening economy in Waltham Cross is more limited and the centre is used very rarely as a destination for pubs and restaurants with only 4.9% of respondents in Zone 4 visiting Waltham Cross most often for pubs/clubs and 4.9% visiting for general evening entertainment.
- 7.4 The results of the household telephone survey indicate that Cheshunt is performing a reasonably influential role in terms of the evening economy. When asked where respondents go most often for pubs/clubs, 13.7% of people in Zone 4 cited Cheshunt.

8. RESTAURANTS

- 8.1 It is generally considered that the recession has brought mixed fortunes for the restaurant sector. The main casualties appear to have been from the more exclusive end of the market, as well as smaller companies with less established brands. Many companies owning multiple brands have announced

stable results and are seeking to trade through the uncertainties by offering heavy promotions and discounts. The fall in property prices has also provided an opportunity for stronger niche operators to expand their brands as they have been able to negotiate substantial discounts on rents and landlords have been offering attractive incentive packages to help fill vacant units.

- 8.2 For families in particular, going out for a meal has become too expensive, and many have switched to staying at home with a takeaway which has increased sales for businesses such as Domino's. There has also been a surge in 'all-you-can-eat' style restaurants which are aimed at offering value for money for working class families. The Taybarn brand owned by Whitbread is currently trading very strongly and the brand is pursuing aggressive openings in the current market despite concerns over the quantity of food that is consumed in such restaurants and the implications for health.
- 8.3 The Household Telephone Survey identifies that approximately 80% of respondents visit restaurants as an evening leisure activity. It is evident that Enfield is the most frequented destination for restaurant visits with a market share of 15.8%, followed by Hertford with a market share of 11.5%. A number of other centres attract market share including Hoddesdon (4.3%), London West End (4.1%), Ware (3.6%) and Harlow (3.2%). Within the Borough, it is evident that 33.3% of respondents in Zone 1 visit Hoddesdon most often for restaurants; 4.9% of respondents in Zone 4 visit Waltham Cross and 11.8% visit Cheshunt for restaurants.

Table 8.1: Most Dominant Restaurant Destinations

Restaurant Destination	Market Share
Enfield	15.8%
Hertford	11.5%
Hoddesdon	4.3%
London West End	4.1%
Other	4%
Ware	3.6%
Harlow	3.2%
Chingford	2.6%
Potters Bar	2.6%
Cheshunt	2.5%
Waltham Abbey	2.2%
Don't Visit	20.1%
Don't Know / Varies	15.8%

Source: Household Telephone Survey, September 2006

9. LEISURE EXPENDITURE PROJECTIONS

9.1 In this section we summarise the overall growth in available leisure expenditure to demonstrate the extent of growth rates and variations in Broxbourne's catchment area. The Experian E-marketer Report calculates annual consumer leisure expenditure⁴ per person on leisure and recreation goods and services in 2007, based upon the demographic profile of the catchment area.

9.2 We have taken the base position and projected available expenditure per capita leading up to 2026 based on the population projections for the study area, and assuming an ultra long term growth rate in available expenditure of 2.1% per annum for leisure goods. This ultra long term growth rate figure is derived from Experian Business Strategies Retail Planner Briefing Note 7.1 (August 2009).

Table 9.1: Per Capita Leisure Goods Expenditure

	2007 (£)	2009 (£)	2013 (£)	2018 (£)	2023 (£)	2026 (£)
Zones 1 to 4 (Broxbourne Borough)	£1,896	£1,976	£2,148	£2,383	£2,644	£2,814
Zones 5 to 12	£2,017	£2,102	£2,284	£2,535	£2,812	£2,993
All Zones	£1,952	£2,035	£2,211	£2,453	£2,722	£2,897

Source: Experian Business Solutions, E-Marketer, October 2009, Table 2, Appendix 2

9.3 The annual consumer expenditure per person on leisure goods is currently £1,896 in 2007 prices for Zones 1 to 4, which roughly corresponds to the Borough of Broxbourne local authority area. This is slightly higher than the UK average which Experian estimate at £1,886. We estimate that per capita leisure expenditure in the Borough will grow to £2,148 by 2013, rising to £2,383 by 2018 and £2,644 by 2023. For Zones 5 to 12, the annual consumer expenditure per person on leisure goods is currently £2,017 (2007 prices), which gives an average per capita expenditure of £1,952 across the entire survey area in 2007, rising to £2,722 in 2023.

9.4 If we apply the per capita goods expenditure to the total population of the catchment area, it highlights that there is currently £681.5m of available leisure expenditure, which is expected to rise to just over £1 billion by 2026. For Zones 1 to 4 (the Borough area), there is currently £180.1m of available leisure expenditure within the catchment area, which is expected to rise to £201m by 2013; £230m by 2018, £264m by 2023 and £285m by 2026, an increase of 58% between 2009 and 2026.

⁴ Leisure expenditure includes recreation and sporting services, cultural services, games of chance (gambling) and bars/restaurants.

Table 9.2: Total Leisure Expenditure

	2009 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
Zones 1-4 (Broxbourne Borough)	£180,068	£201,218	£230,376	£263,568	£285,313
Zones 5-12	£526,523	£571,871	£654,599	£748,392	£810,839
All Survey Zones	£681,494	£760,732	£870,833	£995,797	£1,078,633

Source: Experian Business Solutions, E-marketer, 2009, Table 3, Appendix 2

Restaurant/Café Expenditure

- 9.5 According to Experian Business Solutions (2006) the average person spends £1,139 per annum in restaurants/cafes. Experian also estimate that people's average likely spend on leisure goods such as eating out increases by 2.1% each year. Currently the total spend available for restaurants/cafés in the study area is £411.6m, increasing to £459m in 2013, rising to 526m in 2021, rising to £601m in 2023 and £651m in 2026 as identified in Table 9.3.

Table 9.3: Restaurant / Café Expenditure Forecasts

	2009 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
Zones 1 to 4 (Broxbourne Borough)	£106,740	£119,276	£136,561	£156,236	£169,126
Zones 5 to 12	£309,004	£344,795	£394,675	£451,225	£488,875
All Zones	£411,620	£459,479	£525,980	£601,458	£651,490

Source: Experian Business Solutions, E-marketer, 2009, Table 5, Appendix 2

- 9.6 Given best practice, the growing trend towards mixed-use schemes discussed and evident strong growth in expenditure in this sector, it is usual to assume that comparison goods retail schemes will comprise circa 15% of leisure floorspace. Whilst this is a relatively crude assumption, it provides an indication of the level of café, bar and restaurant floorspace which could be included in a new scheme at Greater Brookfield. It is therefore necessary to assume that any identified town centre capacity for comparison goods will be accompanied by 15% of restaurant/café/bar floorspace. Table 9.4 indicates the potential capacity for additional leisure floorspace (Use Classes A3/A4) for Greater Brookfield.

Table 9.4: A3/A4 Floorspace Capacity (sqm gross)

A3/A4 Floorspace Capacity for the Borough of Broxbourne	2013 (sqm gross)	2018 (sqm gross)	2023 (sqm gross)	2026 (sqm gross)
Base Scenario	1,400	3,618	6,257	8,007
Cautious Scenario	958	2,282	4,995	6,923
Trend Scenario	1,654	4,280	7,450	9,585

Source: Experian Business Solutions, E-marketer, 2009 and GVA Grimley 2009, Appendix 3

- 9.7 Clearly the profile of the catchment population, in relation to the proportion of ABs (professional / managerial socio-economic groups), will determine the location, scale and quality of restaurants/cafés in the catchment area. There is strong growth in overall leisure expenditure, and the above analysis supports the argument for more leisure floorspace to meet the need resulting from a growth in expenditure over the LDF period. The figures outlined in Table 9.4 do not include commercial leisure facilities such as cinemas, and only indicate capacity for restaurants, bars and cafés and other similar leisure uses falling within Use Class A3/A4. These figures are over and above committed retail/town centre schemes.
- 9.8 This is a growth sector and should be encouraged in Hoddesdon to enhance both the daytime and evening economy whilst drawing on policy control measures to prevent undesirable uses such as A5 take-aways.

10. SEQUENTIAL SITES

- 10.1 In order to complete our assessment, we have reviewed the availability of sequential sites for commercial leisure facilities within the town centres of Hoddesdon, Cheshunt and Waltham Cross. Based on discussions with the Council and the findings of the Council's previous retail studies we have a number of potential development opportunity sites for retail and/or leisure uses have been identified.
- 10.2 In Hoddesdon, the only future development opportunity is the Tower Centre, which lies outside of the core retail area in the town centre and thus offers greater flexibility in the range of uses that could be accommodated on the site. The Tower Centre has recently been refurbished, however we consider that the site could be suitable for additional cafés, bars and restaurants, and if a large enough site area could be created then there could also be the possibility of other leisure uses such as a cinema, health and fitness club or bingo hall.
- 10.3 In Waltham Cross, a site known as Sturlas Way has been identified as having the potential to accommodate future retail and/or leisure floorspace. The site is bound by Wickes, the High Street,

Sturlas Way and Park Lane. In the 2008 Borough wide Retail Study, it was noted that a larger site could be created by demolishing the shop units fronting onto the High Street and it was recommended that the Council should consider policy options to enhance the accessibility of the site and its environment to support retail development. It was considered that the introduction of a foodstore could be appropriate on the site to help consolidate the role of Waltham Cross as an everyday convenience and service destination.

- 10.4 Development opportunities are more limited in Cheshunt and it is considered that the only opportunity in the future could be to improve and enhance the Tesco foodstore to provide a more modern supermarket. No other town centre sites have been identified

11. SUMMARY

- 11.1 Our assessment of the commercial leisure sector within the Broxbourne catchment area indicates that there is a reasonable range of commercial leisure facilities including cinemas, bingo clubs, ten-pin bowling halls, bars, clubs and restaurants and health and fitness clubs. There are, however, evident gaps and deficiencies in the quality of some facilities, particularly within the Borough of Broxbourne.
- 11.2 The recession has brought many challenges for the leisure industry but evidence suggests that leisure spending remains an important part of people's lifestyle choices. The industry continues to evolve in response to the changes and operators are seeking to diversify their product to increase market share, sales and profits.
- 11.3 Cinema provision within the Borough is limited with only one screen run by the Council. Although this is an important local facility, it does not appeal to many sectors of the population who want to see the latest blockbuster hits at modern multiplexes. Currently, residents have to travel to outside of the Borough to Enfield and Harlow to their nearest multiplex. Although the cinema industry is not immune to the recession and recent evidence suggests that the opening of new screens has slowed down, for many people, especially families, a night at the cinema is considered to represent relatively good value.
- 11.4 We have carried out a quantitative assessment to look at the future need for cinema provision in Broxbourne. This highlights capacity for an additional 15 cinema screens within the Broxbourne catchment area up to 2013, rising to 21 screens in 2026. We therefore consider that a small to medium sized multiplex cinema could be supported within the Borough on the basis that there are currently no commitments for new cinemas in the Borough or the wider sub-region. A new cinema in the Borough would also serve a gap in the market in the area to the east of Broxbourne and around Waltham Abbey.
- 11.5 In terms of the bingo industry, it is evident that there has been a fall in revenues as a result of the smoking ban and the rise in online gambling. We predict that the market will continue to struggle in the

- recession and although there would appear to be a gap in the current provision of bingo halls within the Borough, it is our view that future provision will be dependent on market demand.
- 11.6 The ten pin bowling industry appears to be performing marginally better, and like cinemas, it remains a strong family activity. There are currently no ten-pin bowling alleys in the Borough. The closest facilities are in Harlow, Lakeside, Bishops Stortford and Stevenage. There are also no facilities in Welwyn Garden City, Hatfield, Potters Bar or Enfield and on this basis we consider that there could be the potential to support a new ten-pin bowling alley in the Borough, subject to market demand.
- 11.7 There is a good provision of local authority operated leisure facilities throughout the borough providing a range of health and fitness activities. There are however no private operators, which is surprising given the growth in this industry over the last decade and Broxbourne's relatively affluent catchment area. Although the health and fitness industry is facing many challenges as a result of the current economic downturn, there is evidence that value and budget operators are entering the market and are actively looking to expand throughout the UK. We consider that could be capacity for at least one privately operated health and fitness operator within the Borough and in light of the current economic circumstances, demand is likely to be from a mid range or budget operator.
- 11.8 With regards to eating and drinking, it is clear that Hoddesdon is the most popular destination for this activity within the Borough, reflecting the size of its offer. However, there would appear to be a significant proportion of expenditure leaking to competing centres including Enfield, Hertford and Ware, as well as London's West End. In this respect, it is clear that there is a need to improve the range and quality eating and drinking outlets within the Borough.
- 11.9 The recession has brought mixed fortunes for the eating and drinking industry. There have been casualties at the more exclusive end of the market, but growth and aggressive expansion from value brands such as JD Wetherspoon and 'all-you-can-eat' buffet restaurants. Experian predict that leisure expenditure will continue to increase and we consider that there will be sufficient expenditure to support new eating and drinking facilities within the Borough in the future. It is our view that the Borough should seek to promote a range of high quality cafés, restaurants and bars as part of future mixed use retail and leisure developments.
- 11.10 The final part of our analysis considers sequentially preferable sites for leisure floorspace within the Borough's main town centres. Drawing on information from the Borough wide retail study, it is apparent that there is a shortage of suitable and available sites for both retail and leisure development in Cheshunt, Hoddesdon and Waltham Cross town centres, and there are no clearly identified sites to accommodate major commercial leisure facilities.
-

APPENDIX 1

BROXBOURNE CINEMA NEEDS ASSESSMENT

BOROUGH OF BROXBOURNE

Table 1 - Existing Cinemas in the Catchment Area

Cinema	Location	Screens	% of Catchment Overlap	Screens Serving Catchment
Existing provision				
CINEWORLD	ENFIELD	15	20	3.0
BROXBOURNE HALL	HODDESDON	1	100	1.0
WYLLYOTTS CENTRE	POTTERS BAR	1	20	0.2
TOTAL		17		4.2

Source - Cinemagoing 18 (Dodona Research, 2009)

BOROUGH OF BROXBOURNE

Table 2 - Screen and Seat Provision

	Estimated Population (millions)	Number of Screens	Population per screen
<u>2008</u>			
UK	62.89	3,610	17,421
Cinemas within Catchment	0.335	4.2	79,741
<u>2009</u>			
UK	64.07	3,670	17,458
Cinemas within Catchment	0.335	4.2	79,741
<u>Forecasts 2013</u>			
UK	65.05	3,650	17,822
Cinemas within Catchment	0.344	4.2	81,912
<u>Forecasts 2018</u>			
UK	65.69	4,030	16,301
Cinemas within Catchment	0.355	4.2	84,513
<u>Forecasts 2023</u>			
UK	67.89	4,362	15,564
Cinemas within Catchment	0.366	4.2	87,102
<u>Forecasts 2026</u>			
UK	69.12	4,629	14,932
Cinemas within Catchment	0.372	4.2	88,645

Source - Experian Goad Population figures & Dodona Research

BOROUGH OF BROXBOURNE

Table 3a - Cinema Capacity (2008)

		No of Screens Total
UK population per screen (2008)	17,421	
Catchment Population	334,912	
Number if catchment to match UK average		19.2
Total number of screens needed by 2008		15.0

Table 3b - Cinema Capacity (2013)

		No of Screens Total
UK population per screen (2013)	17,822	
Catchment Population	344,031	
Number if catchemnt to match UK average		19.3
Total number of screens needed by 2013		15.10

Table 3c - Cinema Capacity (2018)

		No of Screens Total
UK population per screen (2018)	16,301	
Catchment Population	354,954	
Number if catchment to match UK average		21.8
Total number of screens needed 2018		17.58

Table 3d - Cinema Capacity (2023)

		No of Screens Total
UK population per screen (2023)	15,564	
Catchment Population	365,830	
Number if catchment to match UK average		23.5
Total number of screens needed 2023		19.31

Table 3e - Cinema Capacity (2026)

		No of Screens Total
UK population per screen (2026)	14,932	
Catchment Population	372,310	
Number if catchment to match UK average		24.9
Total number of screens needed 2026		20.73

APPENDIX 2

BROXBOURNE LEISURE EXPENDITURE NEEDS

BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY UPDATE 2009
Leisure Modelling

TABLE 1
SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	2009	2013	2018	2023	2026
1	EN11 0/8/9	20,526	21,208	21,811	22,555	22,940
2	EN 10 6/7	15,909	16,343	16,909	17,415	17,680
3	EN 7 5/6	21,428	22,109	22,960	23,774	24,250
4	EN 8 0/7/8/9	33,255	34,038	35,008	35,957	36,533
5	CM 19 5, EN 9 2	13,734	14,377	15,149	15,660	15,952
6	EN 9 1/2, 1G 10 4, E4 7	31,655	31,744	31,935	32,402	32,708
7	EN 3 4/5/6/7	48,538	50,435	52,501	54,535	55,905
8	EN 2 8/9, EN1 1/3/4, EN 2 0/6/7	67,715	68,789	70,093	71,398	72,422
9	EN 6 1/4/5	15,450	15,547	15,802	16,127	16,285
10	SG 13 8, AL 9 6, SG 14 1	10,043	10,371	10,883	11,324	11,539
11	SG 14 2/3, SG 12 0/7	34,547	35,903	37,399	38,869	39,643
12	SG 13 7, SG 12 8/9	22,112	23,167	24,504	25,814	26,453
TOTAL		334,912	344,031	354,954	365,830	372,310

SOURCE: Experian Business Solutions, September 2009

TABLE 1A
POPULATION GROWTH RATES

2009-2013 (%)	2009-2018 (%)	2009-2023 (%)	2009-2026 (%)
3.3	6.3	9.9	11.8
2.7	6.3	9.5	11.1
3.2	7.1	10.9	13.2
2.4	5.3	8.1	9.9
4.7	10.3	14.0	16.1
0.3	0.9	2.4	3.3
3.9	8.2	12.4	15.2
1.6	3.5	5.4	7.0
0.6	2.3	4.4	5.4
3.3	8.4	12.8	14.9
3.9	8.3	12.5	14.8
4.8	10.8	16.7	19.6
2.7	6.0	9.2	11.2

BROXBOURNE BOROUGH COUNCIL

BRIDGING REPORT JUNE 2010

Leisure Modelling

TABLE 2
PER CAPITA LEISURE EXPENDITURE 2007 Price Base (Grown by 2.1% per annum)

Zone	2007	2009	2013	2018	2023	2026
1	1,900	1,981	2,152	2,388	2,650	2,820
2	1,969	2,053	2,230	2,475	2,746	2,922
3	1,919	2,000	2,174	2,412	2,676	2,848
4	1,795	1,871	2,033	2,256	2,503	2,664
5	1,942	2,024	2,200	2,441	2,708	2,882
6	2,010	2,095	2,277	2,526	2,803	2,983
7	1,767	1,842	2,002	2,221	2,464	2,623
8	2,005	2,090	2,271	2,520	2,796	2,976
9	2,144	2,235	2,429	2,695	2,990	3,182
10	2,176	2,268	2,465	2,735	3,034	3,230
11	2,032	2,118	2,302	2,554	2,834	3,016
12	2,057	2,144	2,330	2,585	2,868	3,053
Zones 1 - 4	1,896	1,976	2,148	2,383	2,644	2,814
Zones 5 - 12	2,017	2,102	2,284	2,535	2,812	2,993
All Zones	1,952	2,035	2,211	2,453	2,722	2,897

Source: Experian Business Strategies and Expenditure Data for Broxbourne, September 2009

TABLE 3
TOTAL SURVEY AREA LEISURE EXPENDITURE (2007 Price Base)

Zone	2009	2013	2018	2023	2026
1	40,655	45,647	52,085	59,760	64,690
2	32,654	36,453	41,845	47,817	51,667
3	42,866	48,062	55,377	63,619	69,068
4	62,226	69,212	78,980	90,004	97,328
5	27,803	31,628	36,976	42,408	45,978
6	66,327	72,279	80,676	90,820	97,575
7	89,407	100,954	116,597	134,377	146,614
8	141,531	156,238	176,633	199,624	215,513
9	34,531	37,759	42,581	48,216	51,821
10	22,781	25,564	29,764	34,361	37,266
11	73,179	82,644	95,514	110,138	119,558
12	47,415	53,983	63,351	74,046	80,760
Zones 1 - 4	180,068	201,218	230,376	263,568	285,313
Zones 5 - 12	526,253	571,871	654,599	748,392	810,839
All Zones	681,494	760,732	870,833	995,797	1,078,633

Source: Tables 1 and 2

BROXBOURNE BOROUGH COUNCIL

BRIDGING REPORT JUNE 2010

Leisure Modelling

TABLE 4
PER CAPITA CAFÉ AND RESTAURANT EXPENDITURE 2007 Price Base (Grown by 2.1% per annum)

Zone	2007	2009	2013	2018	2023	2026
1	1,128	1,176	1,278	1,418	1,573	1,674
2	1,164	1,213	1,319	1,463	1,623	1,728
3	1,142	1,190	1,294	1,435	1,592	1,695
4	1,061	1,106	1,202	1,334	1,480	1,575
5	1,145	1,194	1,297	1,439	1,597	1,699
6	1,200	1,251	1,359	1,508	1,673	1,781
7	1,097	1,144	1,243	1,379	1,530	1,628
8	1,245	1,298	1,410	1,565	1,736	1,848
9	1,275	1,329	1,444	1,602	1,778	1,892
10	1,325	1,381	1,501	1,665	1,848	1,967
11	1,206	1,257	1,366	1,516	1,682	1,790
12	1,234	1,286	1,398	1,551	1,721	1,831
Zones 1 - 4	1,124	1,171	1,273	1,412	1,567	1,668
Zones 5 - 12	1,216	1,267	1,377	1,528	1,696	1,805
All Zones	1,179	1,229	1,336	1,482	1,644	1,750

Source: Experian Business Strategies and Expenditure Data for Broxbourne, September 2009

TABLE 5
TOTAL SURVEY AREA CAFÉ AND RESTAURANT EXPENDITURE (2007 Price Base)

Zone	2009	2013	2018	2023	2026
1	24,136	24,938	30,922	35,478	38,405
2	19,304	19,831	24,737	28,268	30,544
3	25,509	26,320	32,955	37,860	41,102
4	36,781	37,647	46,684	53,200	57,529
5	16,393	17,160	21,801	25,004	27,109
6	39,598	39,709	48,165	54,221	58,254
7	55,506	57,675	72,386	83,425	91,022
8	87,883	89,277	109,680	123,956	133,822
9	20,535	20,664	25,322	28,673	30,817
10	13,872	14,325	18,124	20,923	22,692
11	43,432	45,137	56,688	65,368	70,958
12	28,444	29,801	38,005	44,420	48,448
Zones 1 - 4	106,740	119,276	136,561	156,236	169,126
Zones 5 - 12	309,004	344,795	394,675	451,225	488,875
All Zones	411,620	459,479	525,980	601,458	651,490

Source: Tables 1 and 4

APPENDIX 3

BROXBOURNE CAFÉ AND RESTAURANT NEEDS ASSESSMENT

BROXBOURNE BOROUGH COUNCIL

RETAIL STUDY UPDATE 2009

A3 and A4 Floorspace Capacity

TABLE 1
CAPACITY FOR A3 AND A4 FLOORSPACE IN BROXBOURNE BOROUGH: BASE SCENARIO

	2013	2018	2023	2026
Capacity for new comparison goods floorspace (sqm net)	5,158	13,326	23,048	29,492
Capacity for new comparison floorspace (sqm gross)	7,935	20,502	35,459	45,372
Broad level of supportable A3 and A4 floorspace (sqm net)	910	2,352	4,067	5,204
Broad level of supportable A3 and A4 floorspace (sqm gross)	1,400	3,618	6,257	8,007

Source: GVA Grimley Capacity Modelling. Gross to net ratio of 65:35

TABLE 2
CAPACITY FOR A3 AND A4 FLOORSPACE IN BROXBOURNE BOROUGH: CAUTIOUS SCENARIO

	2013	2018	2023	2026
Capacity for new comparison goods floorspace (sqm net)	3,527	8,404	18,399	25,132
Capacity for new comparison floorspace (sqm gross)	5,426	12,930	28,306	38,664
Broad level of supportable A3 and A4 floorspace (sqm net)	622	1,483	3,247	4,435
Broad level of supportable A3 and A4 floorspace (sqm gross)	958	2,282	4,995	6,823

Source: GVA Grimley Capacity Modelling. Gross to net ratio of 65:35

TABLE 3
CAPACITY FOR A3 AND A4 FLOORSPACE IN BROXBOURNE BOROUGH: TREND LINE SCENARIO

	2013	2018	2023	2026
Capacity for new comparison goods floorspace (sqm net)	6,094	15,763	27,440	35,306
Capacity for new comparison floorspace (sqm gross)	9,375	24,251	42,216	54,317
Broad level of supportable A3 and A4 floorspace (sqm net)	1,075	2,782	4,842	6,230
Broad level of supportable A3 and A4 floorspace (sqm gross)	1,654	4,280	7,450	9,585

Source: GVA Grimley Capacity Modelling. Gross to net ratio of 65:35

PLAN 1

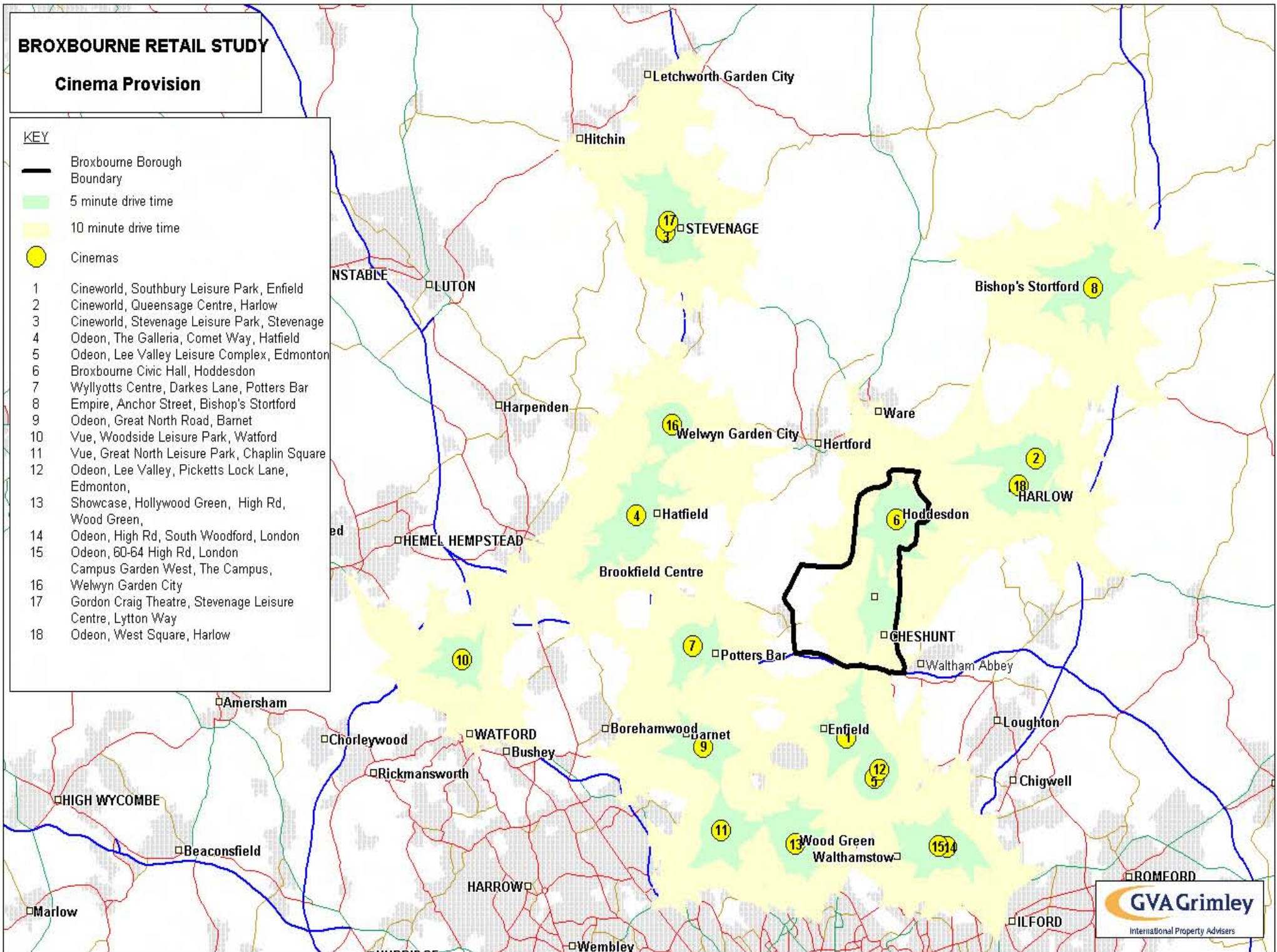
BROXBOURNE CINEMA PROVISION WITH DRIVE TIMES

BROXBOURNE RETAIL STUDY

Cinema Provision

KEY

-  Broxbourne Borough Boundary
 -  5 minute drive time
 -  10 minute drive time
 -  Cinemas
- 1 Cineworld, Southbury Leisure Park, Enfield
 - 2 Cineworld, Queensage Centre, Harlow
 - 3 Cineworld, Stevenage Leisure Park, Stevenage
 - 4 Odeon, The Galleria, Comet Way, Hatfield
 - 5 Odeon, Lee Valley Leisure Complex, Edmonton
 - 6 Broxbourne Civic Hall, Hoddesdon
 - 7 Wyllyotts Centre, Darkes Lane, Potters Bar
 - 8 Empire, Anchor Street, Bishop's Stortford
 - 9 Odeon, Great North Road, Barnet
 - 10 Vue, Woodside Leisure Park, Watford
 - 11 Vue, Great North Leisure Park, Chaplin Square
 - 12 Odeon, Lee Valley, Picketts Lock Lane, Edmonton
 - 13 Showcase, Hollywood Green, High Rd, Wood Green
 - 14 Odeon, High Rd, South Woodford, London
 - 15 Odeon, 60-64 High Rd, London
 - 16 Campus Garden West, The Campus, Welwyn Garden City
 - 17 Gordon Craig Theatre, Stevenage Leisure Centre, Lytton Way
 - 18 Odeon, West Square, Harlow




PLAN 2


BROXBOURNE BINGO HALL PROVISION WITH DRIVE TIMES


BROXBOURNE RETAIL STUDY

Bingo Hall Provision

KEY

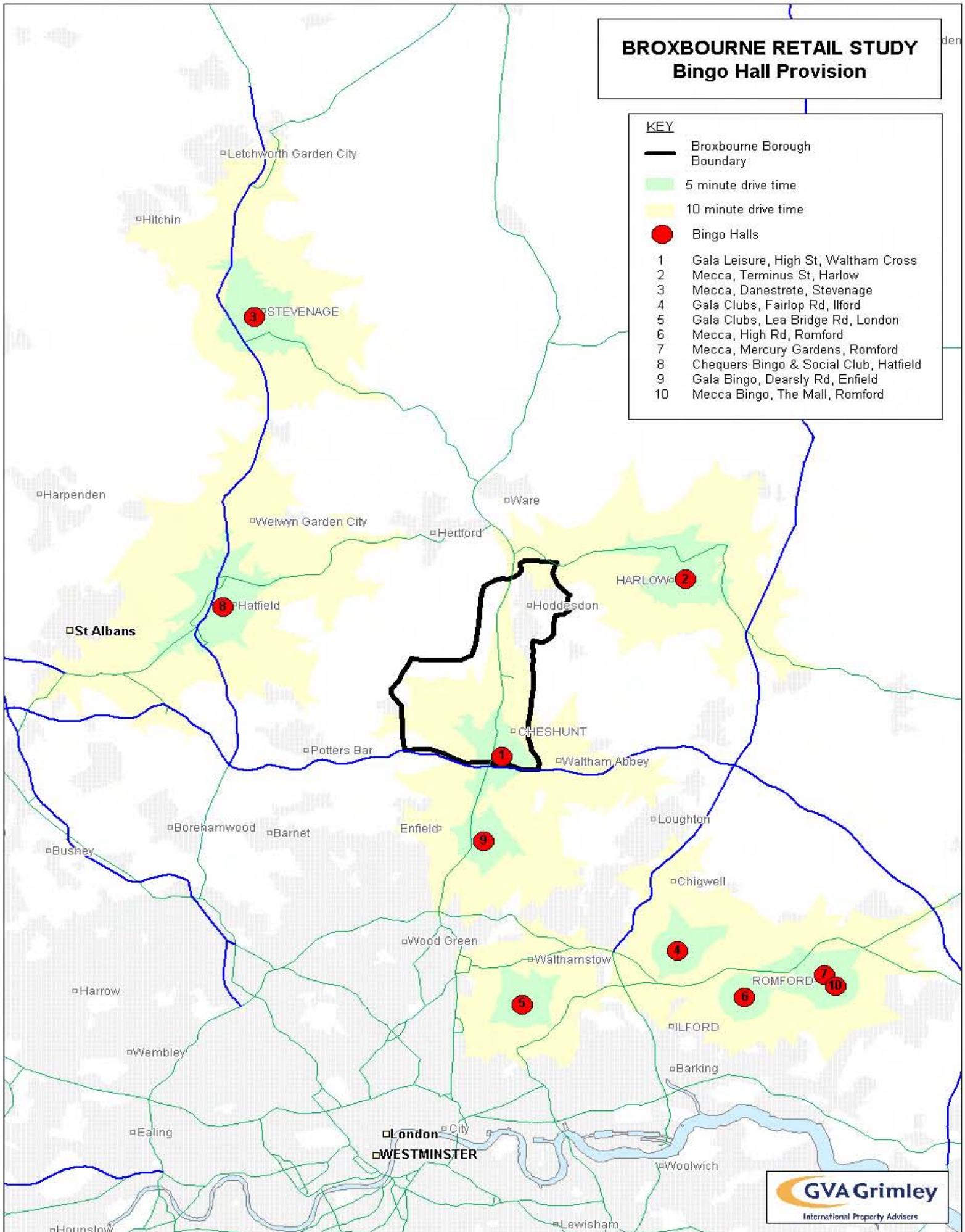
 Broxbourne Borough Boundary

 5 minute drive time

 10 minute drive time

 Bingo Halls

- 1 Gala Leisure, High St, Waltham Cross
- 2 Mecca, Terminus St, Harlow
- 3 Mecca, Danestrete, Stevenage
- 4 Gala Clubs, Fairlop Rd, Ilford
- 5 Gala Clubs, Lea Bridge Rd, London
- 6 Mecca, High Rd, Romford
- 7 Mecca, Mercury Gardens, Romford
- 8 Chequers Bingo & Social Club, Hatfield
- 9 Gala Bingo, Dearsly Rd, Enfield
- 10 Mecca Bingo, The Mall, Romford



PLAN 3

BROXBOURNE TEN PIN BOWLING PROVISION WITH DRIVE TIMES

BROXBOURNE RETAIL STUDY

Bowling Provision

KEY

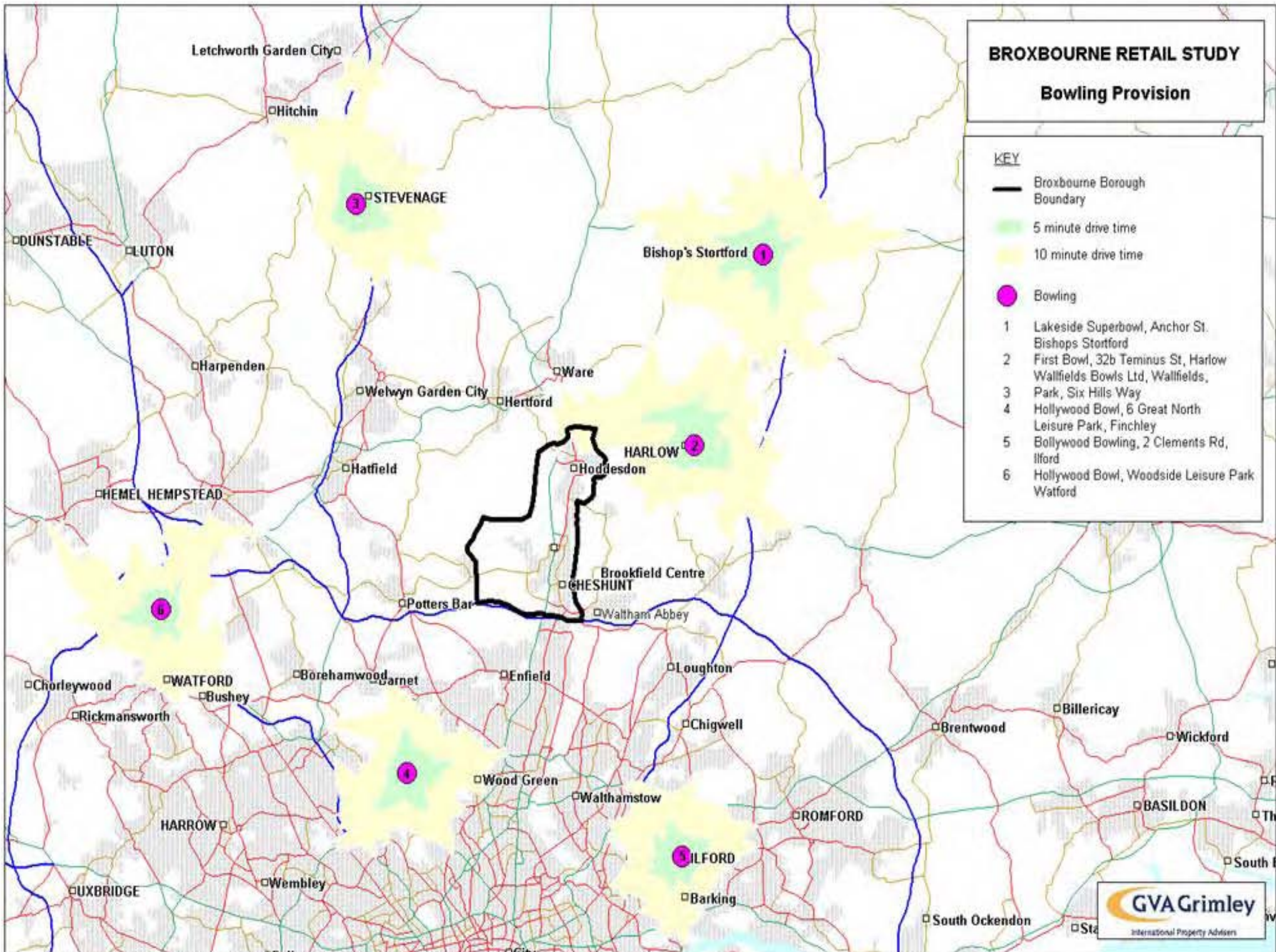
— Broxbourne Borough Boundary

5 minute drive time

10 minute drive time

● Bowling

- 1 Lakeside Superbowl, Anchor St, Bishops Stortford
- 2 First Bowl, 32b Teminus St, Harlow
- 3 Wallfields Bowls Ltd, Wallfields, Park, Six Hills Way
- 4 Hollywood Bowl, 6 Great North Leisure Park, Finchley
- 5 Bollywood Bowling, 2 Clements Rd, Ilford
- 6 Hollywood Bowl, Woodside Leisure Park, Watford



PLAN 4

BROXBOURNE HEALTH AND FITNESS CLUB PROVISION WITH DRIVE TIMES

BROXBOURNE RETAIL STUDY

Health & Fitness Provision

- KEY**
- Broxbourne Borough Boundary
 - 5 minute drive time
 - 10 minute drive time
 - Health & Fitness
- 1 Grange Paddocks Pool & Gym, Bishop's Stortford
 - 2 Nuffield Health & Wellbeing, Bishop's Stortford
 - 3 The Bishops Stortford Sports Hall, Bishop's Stortford
 - 4 Cannons Health Club, Bishop's Stortford
 - 5 Challenge Gym and Fitness Centre, Bishop's Stortford
 - 6 Birchwood High School, Bishop's Stortford
 - 7 Ward Freman Pool, Buntingford
 - 8 Goffs Sports Centre, Cheshunt
 - 9 Grundy Park Leisure Centre, Cheshunt
 - 10 Esporta, Enfield
 - 11 David Lloyd, Enfield
 - 12 Harlow Sport Centre, Harlow
 - 13 David Lloyd, Hatfield
 - 14 Hatfield Leisure Centre, Hatfield
 - 15 Hertfordshire Sports Village, Hatfield
 - 16 Birchwood Leisure Centre, Hatfield
 - 17 Nuffield Health & Wellbeing, Hertford
 - 18 Cannons Health & Fitness Ltd, Hertford
 - 19 Haileybury Sports Complex, Hertford
 - 20 Hartham Pool and Leisure Centre, Hertford
 - 21 Hertford Slimming Centre, Hertford
 - 22 Hartham Leisure Centre, Hertford
 - 23 The John Warner Sports Centre, Hoddesdon
 - 24 Esporta, Ilford
 - 25 Furzeffield Centre, Potters Bar
 - 26 Parkwood Health and Fitness, Potters Bar
 - 27 Esporta, Romford
 - 28 Leventhorpe Pool & Gym, Sawbridgeworth
 - 29 LA Fitness, Stevenage
 - 30 David Lloyd, Stevenage
 - 31 Fitness First, Stevenage
 - 32 Utopian Fitness Centre, Stevenage
 - 33 John Henry Newman Leisure Centre, Stevenage
 - 34 Stevenage Swimming Centre, Stevenage
 - 35 Shephall Leisure Centre, Stevenage
 - 36 Curves, Stevenage
 - 37 John Henry Newman Leisure Centre, Stevenage
 - 38 Odyssey Knebworth Ltd, Stevenage
 - 39 Shephall Leisure Centre, Stevenage
 - 40 Fanshawe Pool & Gym, Ware
 - 41 Campus West, Welwyn Garden City
 - 42 Gosling Sports Park, Welwyn Garden City

