BROXBOURNE BOROUGH COUNCIL

Broxbourne Retail Study

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APPENDICES

1. INTRODUCTION

1.1 GVA Grimley was instructed by Broxbourne Borough Council in 2008 to carry out a retail study of the Borough to inform the Council's future planning for retail in accordance with guidance set out in Planning Policy Statement 6 (PPS6): Planning for Town Centres. GVA Grimley previously prepared a study for Greater Brookfield in November 2005 which included a review of the 2004 DTZ-Pieda Retail Study.

1.2 This study provides robust and sound baseline evidence to inform the Council's Local Development Framework (LDF) and future Development Plan Documents (DPD) and is a tool for the Council to make informed choices about the nature and extent of retail growth to be accommodated in the future. In particular, it will play a key role in guiding the spatial vision and strategic objectives of the Core Strategy in the context of population growth over the LDF period including any expansion planned at Brookfield.

1.3 Based on our research, analysis and overall findings, the study identifies the performance of centres and the quantitative and qualitative need for new retail (comparison and convenience goods) floorspace up to 2013, 2018, 2023 and 2026. However, we advise that forecasts beyond a five-year period should be interpreted with caution. We therefore recommend that the assessments be monitored and updated to take account of changes in retail and property market trends, as well as revised spend and population growth projections.

Scope

1.4 The scope of the study, as set out in the client's Brief, is to establish a sound evidence base for Local Development Framework retail strategies and policies; and to review each of the Borough's three key designated centres and the Brookfield Out-of-Town Centre and establish future roles and their place in the retail hierarchy. We have undertaken a thorough healthcheck of the current status of retail activities in the centres and provide detailed information on the likely future demand for such uses up to 2026. Our capacity assessment will specifically provide an estimate of the scale and nature of any changes in future retail provision in the light of:

- Existing and forecast population levels;
- Housing and regeneration growth;
- Forecast changes in retail expenditure;
- Forecast improvements in the productivity and efficiency of retail floorspace;
- Changing forms of retail provision; and
- Overview of possible increases or decreases in the trade draw from competing centres.

Approach

1.5 Our approach draws on the emerging recommendations of our Good Practice Guidance for the Department of Communities and Local Government (DCLG) on how to assess the need for, and impact of key town centre uses. Of particular relevance to this study, we have recommended a transparent approach, where the key steps of the analysis, data inputs and assumptions are clearly set out and justified. In accordance with the Good Practice Guidance, our approach is also underpinned by the use of up to date household telephone interviews to help establish current shopping and leisure patterns, town centre catchments and market share estimates for both comparison and convenience goods retailing.

1.6 This Study also comprises a comprehensive overview of the existing retail network and retail hierarchy in Broxbourne including detailed qualitative healthchecks of Hoddesdon, Waltham Cross, Cheshunt and Brookfield, drawing where possible on the key performance indicators set out in PPS6 (paragraph 4.4).

Report Structure

1.7 This report draws together the results of our research, incorporating the findings of the detailed survey-based technical analysis and healthcheck assessments. The report is structured as follows:-

- **Section 2** summarises the national, regional and local policy framework including the current retail hierarchy definitions, relevant to retail planning in Broxbourne.
- **Section 3** considers current retail trends and specifically the key socio-economic trends which are likely to influence the evolution of retailing in Broxbourne.
- **Section 4** reviews the sub-regional context and in particular the influence of competing centres in the wider region, and potential changes in influence in the future.
- **Sections 5 - 8** present our qualitative assessment of the role, attraction and performance of Broxbourne's three designated centres; Hoddesdon, Waltham Cross and Cheshunt; and the Brookfield Out-of-Town Centre.
- **Sections 9** sets out our baseline economic capacity projections for the Borough, focusing in particular on the capacity for further retail floorspace, having regard to identified commitments, and considers potential development opportunities.
- **Section 10** Brookfield scenario testing.
- **Section 11** sets out our overall conclusions

2. POLICY CONTEXT

2.1 In this section, we examine the key points of relevance from national, regional and local planning policy.

National Policy Context

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

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

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

2.5 The creation of additional floorspace within buildings was brought under control in May 2006 following consultation on the ODPM's report 'Planning Control of Mezzanine and Other Internal Floorspace Additions' (March 2005). This was in response to concerns that the development of mezzanine floors in large retail stores significantly increased the available floorspace, thereby undermining the objectives of planning policy for the regeneration of town centres. The provision, incorporated within the 2004 Act does not seek to prevent such development, but to allow authorities to determine such proposals in the same way they would for external store expansion.

2.6 Changes to the Use Classes Order (UCO) took effect on 21st April 2005, enabling local authorities to have more control over managing town centre development while minimising the proliferation of pubs, takeaways and night-clubs. Cafes and restaurants have retained their A3 classification, pubs and bars have been reclassified under a new Class A4, and takeaways have been reclassified under a new and separate Class A5. Night-clubs have been reclassified as Sui Generis.

Competition Committee: The supply of groceries in the UK market Investigation (April 2008)

2.7 On 30th April 2008, the Competition Commission published the final report on its proposals to remedy competition issues in the UK grocery market. The report recommends introducing a 'competition test' in planning decisions on proposed new grocery stores and extensions which will favour new entrants and grocery retailers over those which already possess a portion of the local market share. It also recommends that the Office of Fair Trading (OFT) be incorporated as a statutory consultee on all applications for grocery retail stores proposing a net sales area in excess of 1,000 sq m and retailers will be required to notify the OFT of any acquisitions of grocery stores with a net sales area greater than 1,000 sq m.

2.8 The report also identifies and releases thirty restrictive covenants being used by retailers to restrict entry by competitors and prohibits future imposition of such covenants. Grocery retailers will also be required to relinquish control over sites in highly-concentrated markets that have been identified as inhibiting entry by competing retailers. Finally, the report recommends the establishment of an independent ombudsman to oversee and enforce a tightened Supermarkets Code of Practice to ensure compliance of the new regulations.

2.9 The Competition Commission does not make any recommendations for other changes to the planning system such as to the 'need' test or 'town centre first' policy. It also does not require any divestments of stores or land holdings. It believes that the recommended measures will be sufficient and proportionate in addressing its concerns about existing and future competition in local markets.

2.10 The recommendations of the Competition Commission are presently being taken into consideration by the Department of Communities and Local Government (DCLG) but do not currently feature in statutory policy nor bear any weight in the determination of planning applications.

Regional Policy Context

East of England Plan Regional Spatial Strategy (May 2008)

2.11 Regional policy is set out in 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.

2.12 The RSS describes the polycentric nature of centres in the East of England region, which predominantly comprise small and medium sized towns surrounded by a rural hinterland. The plan's spatial strategy focuses development on a group of urban areas, termed 'key centres for development and change' which are viewed as providing the region's key focal points for multi/inter-modal transport, retailing and other commercial activities, administration and tourism. 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.

2.13 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 of centres, 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 policy section below.

2.14 The plan acknowledges the presence of three out-of-town centre retail sites 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 such 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. This Retail Study tests the implications of the major retail development at Brookfield on shopping patterns and broadly discusses proposed 'other' uses that form part of the proposals.

2.15 The RSS adopts a more specific sub-area policy approach to address matters which cannot be solved at the local level. The plan defines four areas: the Cambridge Sub-Region, Essex Thames Gateway, Haven Gateway and the London Arc. The London Arc sub-region comprises the districts of Broxbourne, Dacorum, Hertsmere, St Albans, Three Rivers, Watford and Welwyn Hatfield in Hertfordshire, Brentwood and Epping Forest, Essex.

2.16 The London Arc is described as a complex polycentric area of market towns, commuter settlements and twentieth century new towns. The RSS recognises a very strong housing demand in the sub-area and the need to balance priorities of restraining urban sprawl and meeting development needs. Regional policy supports the retention of long-standing green belt restraints with exceptions to support some additional expansion at Hemel Hempstead, Welwyn Garden City and Hatfield as key centres for development and change. Other towns in the London Arc, which although not specifically named but would include Hoddesdon and Waltham Cross; will retain and develop their existing individual roles, recognising potential provision for new development within the built-up area to enhance their distinctive characters and identities. However, the RSS does seek a local review of the Green Belt in Broxbourne.

2.17 The RSS identifies a minimum regional housing requirement in Broxbourne of 5,600 new dwellings by March 2021; of which 2,215 (to 31st March 2007) have already been built. 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.

Hertfordshire Structure Plan Review 1991 - 2011 (April 1998)

2.18 As a result of the 2004 Planning and Compulsory Purchase Act the requirement for county councils to produce structure plans was removed and the above document formally ceased as a statutory document on 27th April 2007. A selection of policies from the plan have been saved although none relate to retail or the shopping hierarchy of centres.

Local Policy Context

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

2.19 The Broxbourne Local Plan was adopted in December 2005. Following changes to the planning system all policies in the plan have been saved until December 2008, however the Council have recently applied to extend this further and are presently awaiting a formal response from the Government Office for the East of England to confirm which policies can be saved. Eventually, the saved policies will expire and be replaced by new policies as part of the Borough's Local Development Framework.

2.20 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 consideration of proposals that is 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. Brookfield is designated as an Out of Town Centre.

2.21 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.

2.22 The local plan identifies core areas within the town centres of Waltham Cross and Hoddesdon where there is a presumption in favour of the retention and enhancement of the primary retail function. Outside these areas, a wider range of uses will be considered. In Hoddesdon, the Tower Centre remains outside the core area to allow greater flexibility of use and increase opportunities for vacant units to be utilised. Policy RCT2 states that the Council will prepare town centre frameworks for Waltham Cross and Hoddesdon and seek to ensure an appropriate range of uses in Cheshunt district centre to maintain and enhance vitality and viability. Policy RTC5 restricts change of use to non-retail uses within core frontages of Hoddesdon and Waltham Cross town centres. It is evident that a relaxation of this may be acceptable where a unit has remained vacant for a considerable period or proved consistently unattractive to retail users.

2.23 Chapter 6 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'*.

2.24 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.

2.25 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 Local Development Framework Core Strategy: Issues and Options (May 2007)

2.26 In May 2007, the Council published an initial core strategy document setting out the key issues faced by the Borough and a range of options for how to tackle them. Pubic consultation on the issues and options concluded in late June 2007 and the Council will review comments before undertaking further consultation on the Core Strategy.

2.27 The initial document outlines the need to support and develop the Borough's town centres but recognises that major development opportunities are limited and that the layout and size of the centre's impact on their abilities to attract investment from top retailers. The Council acknowledges capacity for expansion at Brookfield but recognises associated issues in terms of public transport accessibility, traffic congestion and the limited range of facilities currently on offer. The Council views the emerging LDF as the best way to deliver any further development at Greater Brookfield.

2.28 The Council consider the key objective for the Core Strategy will be to increase the quality and range of shopping provision in safe, attractive and accessible environments. The core issues relate to:

- The location of new retail development and whether there should be a focus on making the most of opportunities in existing town centres or alternatively, through the expansion of Brookfield, a range of facilities and services which will complement existing centres;
- Approaches to ensure a sustainable future for the existing town centres:
  i) Whether by developing an evening and night time economy and providing more leisure and cultural facilities;

  ii) Allowing for more retail opportunities to be generated though the merging of facilities or increasing a mix of facilities.

  iii) Improving the overall aesthetic qualities of the town centres or addressing management issues are other potential approaches.
- Addressing provision of local shopping facilities. Options consider current policies that maintain existing shopping parades with potential to allow more non-retail uses should be pursued, or instead allow market forces to prevail and dictate the make up of local facilities.

2.29 The Issues and Options document recognises that the success and significance of Brookfield cannot be ignored, nor can the local community value and limitation of the Boroughs three centres at Hoddesdon, Waltham Cross and Cheshunt.

Summary

- National planning policy guidance provides the framework for developing Local Plan shopping policies, which are tailored to the specific circumstances of Broxbourne Borough Council. The overarching policy thrust is to sustain and enhance the vitality and viability of existing centres, wherever possible, and to plan positively.
- The East of England plan does not identify Broxbourne's centres, Hoddesdon, Waltham Cross and Cheshunt within the regional retail hierarchy and states that lower order centres should be identified within a local hierarchy set out in the respective LDF's.

- Regional policy does however make reference to the out of centre retail development at Brookfield and encourages Broxbourne Borough Council to define the role of the centre in respect of retail and the potential to incorporate a wider range of uses.
- The local policy context (local plan) defines the retail hierarchy which designates Hoddesdon and Waltham Cross as Town Centres and Cheshunt as a District Centre. Brookfield is defined as an Out of Town Centre. Local policy seeks to ensure the vitality and viability of the centres in the hierarchy is sustained and enhanced.
- The Local Plan identifies some additional retail growth set to come forward as part of mixed use allocations for development at Greater Brookfield. Emerging policy acknowledges capacity for retail expansion at Brookfield and supports the delivery of the long-running proposals for the area; recognising the LDF as the most appropriate route with which to achieve this.

3. RETAIL TRENDS

3.1 To put our assessment of the quality of existing provision and the need for additional floorspace into context, it is relevant to consider the wider economic and social trends likely to influence retailing in the Borough. A number of trends are likely to have a bearing on the future pattern of retail provision in the sub region, and the opportunities arising from development proposals. This section examines key trends and drivers for change in the retail industry. We outline the key national trends in retailing and service provision of particular relevance to Broxbourne drawing from a range of published data sources, including research by Verdict Analysis, Mintel and the New Economics Foundation.

Demographics

3.2 Over the last 20 years UK population has increased at about 0.3% pa but the number of households has increased by nearly three times that rate, as household size has decreased with smaller families, more divorces, people living longer etc. The population is also ageing. These trends are forecast to continue and will affect spending habits – how much we spend, on what and where.

3.3 Over the next 20 years the over 60s age group is expected to grow by 5.3m or 41% and the under 60s age group by only 4%. Older shoppers have a younger mindset than in the past, are more fashion aware and financially better off as a result of house price growth as well as income growth (but post retirement income from pensions could be a concern if they do not achieve anticipated values). They will have more time to shop, will spend more on DIY and gardening and will expect good customer service. Younger shoppers will have higher education fees to pay, will experience higher housing costs, will be more computer literate and spend more on-line, and will spend more on entertainment/leisure so they may have less to spend in the retail sector.

Income and Expenditure

3.4 Incomes and expenditure have shown strong growth over the last 20 years, with retail expenditure growing faster than incomes. At the same time working hours for many, but by no means all employees have lengthened leading to a cash rich, time poor consumer. Overall retail expenditure has increased by about 4% pa in real terms over the last 20 years, with most of this growth on comparison goods rather than convenience goods, where growth has been less than 1% pa. Comparison goods growth has been close to 5% pa over the last 30 years, over 6% pa over the last 20 years and even stronger over the last 10 years. These strong trends are not expected to continue in the foreseeable future due to current high levels of consumer debt, an already low savings ratio and a weaker housing market. Over the next 5-10 years the latest economic forecasts suggest that comparison goods expenditure growth will be about 3.5-4.5% pa.

3.5 With longer working hours for many, shop opening hours in the larger centres have been extended and Sunday is now one of the strongest trading days in the week. This has implications for where retail expenditure is concentrated and the nature of some shopping trips which are considered to be a quasi leisure experience. Longer working hours, plus increasing take-up of the Internet and broadband technology, have led to a huge growth in non-store shopping, albeit from a small base. Total non-store trading including mail order and the internet is currently estimated to be about 2.5% of convenience goods spending and about 6% of comparison goods spending. The latest forecasts suggest continuing strong growth over the next 5-10 years before a plateau is reached at about double the current proportions of expenditure.

Sales Density Increases

3.6 Although hard quantitative evidence is limited, comparison businesses in particular have over time increased sales densities by achieving improvements in productivity in the use of floorspace. PPS6 (paragraph 2.34) requires that quantitative need/capacity assessments have regard to a realistic assessment of such improvement. Analysis of past data is difficult as over the last 20 years sales density increases have been affected by changes in the use of retail floorspace, with higher value space-efficient electrical goods replacing lower value space intensive goods, the growth in out-of-centre retailing, a number of one-off events such as Sunday trading and longer opening hours, and the very strong growth of retail expenditure relative to the growth in floorspace. In the future growth rates of 1.5-2.5% pa seem likely to be achieved for comparison goods, with minimal growth in sales densities for convenience goods. Future growth in Broxbourne might be more limited given the small restricted nature of retail units in the centres.

Employment

3.7 Over the last 20 years retail expenditure has increased at about 4% pa, but retail employment has increased much more slowly. Total employees in employment have increased from 2.1 million to 2.9 million, an increase of 1.75% pa. However, this growth has mainly been in part time employees. Full time equivalent (FTE) employment has hardly increased at all, from about 2 million to 2.2 million, a 0.5% pa increase. Over the next 15 years Experian Business Strategies expect an overall decline in FTE employment with only a marginal increase in part time employment.

Location

3.8 Strong income and expenditure growth has affected retailing in another important way – the rise in car ownership and mobility. Over the last 25 years the number of households owning one or more cars has increased from about 55% to about 75% and the number with two or more cars has nearly trebled from 11% to 30%. Households are now much more mobile than they were and therefore their choices of where to shop and the distances they can travel are much greater. These trends will continue but the rate of change may well diminish.

3.9 Increased mobility and affluence has favoured larger centres over smaller centres. As a result larger centres have increased in size and importance relative to smaller centres which has further reinforced the attraction of larger centres to more mobile shoppers. Smaller centres have, therefore, lost market share and have seen much less new development than the overall rate of expenditure growth would imply. This is recognised by PPS6, which urges local authorities to be pro-active in trying to encourage development in smaller centres.

3.10 Increased mobility and affluence has also stimulated out-of-centre development, which has grown much more rapidly than town centre development. Over the last 20 years the majority of retail development has been in edge or out-of-centre locations. This has lead to increasingly restrictive planning policy in favour of town centres over the last 10 years, but only recently has the growth in out-of-centre development started to slow. This slow down is expected to continue, but Verdict still expect sales at out-of-centre locations to increase at a faster rate than at in-centre locations.

3.11 PPS6 reinforces the Government's town centre first objectives. The sequential site test is still a cornerstone of retail planning policy, favouring town centre sites and necessitating consideration of the disaggregation of retail park proposals so that smaller sites are considered. However, it is also recognised that individual retailer's business models are also relevant. Disaggregation of a retailer's proposed store does not now need to be considered if the operator can demonstrate it would adversely affect their business model.

Size of Units

3.12 The growth of multiple traders and increased competition between companies has meant that the retail structure is increasingly dominated by large companies requiring larger shop units. Shopping centres and out-of-centre development that has been able to accommodate this demand for larger sized units (typically 500-2,000 sq m or larger) have grown in importance, reinforcing the trend of higher order centres and out-of-centre retailing growing in relative importance (i.e. polarisation in the retail hierarchy). Broxbourne's town and district centres are currently unable to meet this demand.

3.13 The growth in the size of stores has caused a contraction in the number of shop units and consumer choice. This is particularly evident in the food sector, with a marked decline in the number of smaller and more specialist food retailers (greengrocers, butchers, fishmongers, bakers etc), and a large increase of superstores. These trends may well weaken in the future due to possible market saturation of large foodstores and concerns over lack of competition due to the market dominance of a few key multiples.

Foodstores

3.14 A by product of the restriction of new development of large foodstores is the growth in applications to extend existing stores and the changing composition of floorspace within existing foodstores. There is an increasing emphasis on the sale of comparison goods at the expense of convenience goods, as expenditure growth rates for comparison goods are much higher than for convenience goods and margins are greater, although sales densities are often lower. This trend poses an increasing threat to smaller centres, as larger foodstores will increasingly sell a wider product range of day-to-day convenience and comparison goods and services.

Shopping and Leisure

3.15 Due to increased affluence and mobility in recent years, and the rise of the internet, shoppers no longer merely shop to satisfy ‘needs’, they increasingly shop to satisfy ‘wants’ as well. Retailing in the higher order centres and the more attractive smaller centres is changing and arguably becoming more of a quasi leisure experience. Leisure spending growth is continuing to outstrip that of retail, although this will need to be monitored given the current economic climate.

3.16 Quality restaurants, coffee shops, cafes and bars, as well as health and fitness centres and multiplexes in larger centres, are therefore important to attract shoppers and encourage longer stays and higher spending. Better integration of retail and leisure facilities mutually benefits both sectors. Pedestrianised streets and covered retail areas are also important in attracting shoppers, as is the overall attractiveness of the town centre, along with good accessibility and car parking.

3.17 A number of factors have helped drive the growth of leisure provision in town centres. Planning policy is important as is the fact that urban living is fashionable. Town centres can offer consumers a much more vibrant atmosphere in which to eat and drink and they also offer a much wider choice of leisure venues, allowing more spontaneous decisions. For bars, restaurants and health & fitness clubs, the attraction of the town centre is ‘daytime trade’ and the ability to capitalise on proximity to businesses and shoppers.

Internet Shopping/E-tailing

3.18 The future impact of E-tailing on the high street is uncertain, although there is growing published information on recent trends. According to Verdict (2006), the e-retail market has grown rapidly in recent years from just below £1.8b in 2000 to £8.2b in 2005 (a growth of 356%). Over the last five years rising numbers of consumers have installed Internet connections into their homes and increasing numbers of established retailers have launched online operations. The research findings state that the e-retail market is still reasonably immature and therefore over the coming five years commentators expect it to continue to grow. As faster internet and broadband technology becomes the norm in many consumers' homes, online shopping will become easier, faster and more reliable, and this will drive growth in the market.

3.19 Electricals is the largest sub sector of online retail in the UK, now accounting for 23.8% of the online market. Despite being the second largest online market, food and grocery recorded rapid growth of 34.5% in 2005 taking its value to £1.86b. While Tesco continues to be by far the largest player in the sector, it now faces growing competition from Asda and, more recently, Sainsbury's. Clothing and footwear comprises the third largest online market, but with consumer requirements to 'look and feel', it has been the least affected comparison retail sector. In 2005, music and video was the fastest growth sector with sales increasing by 36.1%, taking the total to £750m, with sales boosted by a surge in popularity for digital downloads. In contrast, book sales grew by only 16%, and DIY, the fastest growing online market in 2004, slowed markedly in 2005 to 17%.

3.20 As a consequence of this growth, there are huge pressures on retailers as the Internet has provided an attractive alternative for many consumers. Shoppers are selecting their own retail mix online and shopping centres need to compete with this choice, which is not only driven by price and range, but also service and expertise. Town centres will increasingly have to provide a retail experience that the Internet and supermarkets are unable to match, and the market will respond in some way to the varying impacts on different retail sectors. In accordance with PPS6, the emphasis should be on the overall town centre experience, the mix of uses, and not just the retail offer.

Current Economic Climate

3.21 It is clear that retail trends are subject to economic circumstances. It is also evident that there is some uncertainty in the current climate, however as we understand from Experian the current economic downturn is forecast to be short-lived and we therefore maintain our expenditure growth forecasts. The latest Experian forecasts do show weaker sales growth over the next few years; however this is balanced by stronger than anticipated growth experienced over the past two years. Based on ultra long term projections we do not expect revisions to expenditure growth over the longer term, as peaks and troughs are balanced out.

Summary

- National retail trends indicate a continued growth in incomes and expenditure, albeit not at such strong levels as in the last 15-20 years. The growth in expenditure is focused on comparison goods with virtually no increase in convenience goods expenditure.
- Increased car ownership has resulted in greater household mobility and therefore the choices for shopping centres to visit and the distances that can be travelled are much greater. Internet shopping has grown phenomenally in the last few years, albeit from a low base, and looks set to continue in certain sectors.

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

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

4. SUB-REGIONAL CONTEXT

4.1 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.

4.2 It is clear from Table 4.1 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 4.1: 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.

4.3 Shopping patterns derived from the household telephone survey enable us to calculate the amount of comparison goods expenditure that each competing centre draws from the defined survey area. 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 4.2 and illustrated on Plan 4.

4.4 The household telephone survey highlights that Broxbourne competes with a range of other centres, and that the dominant competing centres are Enfield, Harlow and Welwyn Garden City as demonstrated by Table 4.2. 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. Table 4.2 shows that of the total expenditure on comparison goods in the study area is £1,044.4m. Of this, £165.8m (15.9%) is going to Enfield, £119.3m (11.4%) is going to Harlow and £74.0m (7.1%) is going to Welwyn Garden City.

Table 4.2: Study Area Comparison Goods Expenditure Flow to Key Competing Centres

Centre	Comparison Goods Expenditure (£000)	% Total Available Comparison Goods Expenditure
Enfield	165,818	15.9
Harlow	119,312	11.4
Brookfield	**78,971**	**7.6**
Welwyn Garden City	73,992	7.1
Waltham Cross	**65,744**	**6.3**
Hertford	32,957	3.2
Stevenage	22,468	2.2
Hoddesdon	**17,148**	**1.6**
Lakeside	15,860	1.5
Hatfield	12,136	1.2
Cheshunt	**10,224**	**1.0**
Watford	6,565	0.6
Bluewater	5,717	0.5

Source: GVA Household Telephone Survey, April 2008

4.5 Approximately £21.6m (2%) is currently going to out of centre shopping complexes at Lakeside and Bluewater. Other competing centres such as Hertford and Stevenage have marginal influence with a market share of 3.2% and 2.2% respectively. This is less than Brookfield (7.6%) and Waltham Cross (6.3%) but greater than Hoddesdon and Cheshunt drawing less than 2% of the comparison goods expenditure. Hatfield and Watford have minimal influence, each with a market share of 1.2% and 0.6% respectively. It is evident that the four centres in Broxbourne have a combined draw of approximately £172m of total available comparison goods expenditure (16.5%) from within the survey area. The location of each centre in relation to Broxbourne is illustrated on plan 1.

4.6 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 4.3. It is evident that within the core catchment area, the major competing centres and retail parks are taking a larger proportion (38.2%) of comparison goods expenditure than Broxbourne's three town centres and the Brookfield centre combined (35.8%). Within the total survey area (zones 1-12), 55.8% of total comparison goods expenditure is accounted for by competing centres and retail parks, whilst only 16.5% is being retained by Hoddesdon, Waltham Cross, Cheshunt and Brookfield combined.

Table 4.3: 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	16.8	4.2	7.6
Hoddesdon / Waltham Cross / Cheshunt	19.0	5.2	8.9
Total Brookfield / Hoddesdon / Waltham Cross / Cheshunt	**35.8**	**9.4**	**16.5**
Competing Centres / Retail Parks	38.2	62.3	55.8

Source: GVA Household Telephone Survey, April 2008

4.7 Plans 5 to 21 illustrate the comparison goods trade drawn to Broxbourne and the expenditure flows to the identified competing centres from each zone defined by the household telephone survey area.

Profile of Competing Centres

Enfield

4.8 Enfield is the closest and most significant competing centre to Broxbourne, situated just 7.5km to the south of Waltham Cross. The centre benefits from close proximity to the A10 and M25 road network and there are good rail links to Central London with services operating every 5-7 minutes. Shopping in the town centre is orientated in a linear pattern along Church Street, Market Chambers and The Town and within the town's two shopping centres to the south of the main shopping street.

4.9 The larger of the two shopping centres, Palace Gardens opened in 1982 and comprises approximately 20,902 sq m gross floorspace across 41 units. The centre which is anchored by Marks and Spencer and a 2,800 sq m gross Waitrose foodstore, is largely let to multiple retailers including Boots, WH Smith, Burton, Monsoon and Mothercare. Palace Exchange was built as part of a comprehensive redevelopment of Enfield town centre. The 14,864 sq m gross development opened in 2006 and effectively adjoins Palace Gardens to the east. The centre boasts 24 units and is anchored by TK Maxx and Next. Other stores represented include Woolworths, River Island, Topshop/Topman and New Look. Units have also been recently let to H&M, Argos and Lidl.

4.10 To the north the shopping centres link onto the main high street where there is further representation by key retail and service operators including Body Shop, HMV, Superdrug, McDonalds and Starbucks. There is also a large 3 floor Pearsons department store. Further away from the entrances to shopping centre, there is a range of high street banks, charity shops and fast food takeaway outlets and cafes.

4.11 Since the recent development of Palace Exchange there are currently no further significant retail developments in the pipeline that we are aware of. In view of its retail offer and close proximity to the Borough, Enfield is considered the most significant of the identified competing centres and whilst there is presently no additional retail floorspace proposed in Enfield, it is likely that it will continue to draw trade from the southern parts of the borough which is particularly significant for the future health of Waltham Cross.

Harlow

4.12 The East of England Plan (2008) defines Harlow as a Major town centre in the regional structure of town centres. Situated approximately 13km to the east of Hoddesdon, Harlow is the most significant competing centre for the north of the Borough. In parallel with other major New Towns, the town centre is neatly contained within an outer ring road and the shopping area is largely pedestrianised and traffic free. The centre benefits from a good range of multiple retailer representation, the majority of which occupy units within the centre's two shopping complexes.

4.13 The Harvey Centre opened in 1982 comprising 65 units and approximately 33,444 sq m gross. The centre is anchored by Marks and Spencer, Bhs, Tesco, Wilkinson and Primark each occupying large units. Smaller units are occupied by a range of key multiple retailers including Superdrug, Clinton Cards, Iceland, Evans and Thorntons.

4.14 In 2003, the Water Garden shopping centre opened as part of a redevelopment scheme in the town centre. The new retail complex comprises approximately 27,871 sq m gross with 23 retail units situated in the south of the town centre. The centre as a good high street fashion offer with key multiple operators Next, Topshop/Topman, River Island as well as Woolworths, the Entertainer and HMV. The centre is anchored by a 5,730 sq m gross Asda foodstore and the overall retail offer is supplemented by some family restaurant provision including Nandos and Pizza Hut as well as an Esporta gym complex.

4.15 Other key shopping areas in the town centre include Broadwalk, characterised by smaller units occupied by multiple retailers. Further north towards the open market area, the shopping offer is more secondary and there are a greater number of independent retail and service operators. Harlow market operates five days a week.

Welwyn Garden City

4.16 Welwyn Garden City was developed as part of a master plan commissioned by Sir Ebenezer Howard in the 1920s. The centre, which sits approximately 18km west of Hoddesdon and to the east of the A1(M) between J4 and J6, is defined as a Major town centre in the East of England Plan (2008).

4.17 At present, Welwyn Garden City comprises 50,600 sq m gross retail floorspace orientated around public gardens along Howardsgate and within the Howard Shopping Centre which lies in the east of the centre. The Howard Centre opened in 1990, providing 22,296 gross sq m across 58 units and over two floors. Retailers operating in the centre include Marks and Spencer Next, WH Smith and Boots. Other retailers represented in the centre include, John Lewis and Sainsbury's and Waitrose operate a store on the fringe of the town centre.

Hertford

4.18 Hertford town centre is situated approximately 7km north west of Hoddesdon. Hertford is a historic market town which benefits from an attractive position on the River Lea and good links to the primary road network along the A414 and nearby by A1(M). Shopping in the town centre is orientated along the pedestrianised Maidenhead Street and within the Bircherley Green Shopping Centre.

4.19 Bircherley Green Shopping Centre comprises an open precinct development which originally opened in 1983 with an approximate floorspace of 4,850 sq m gross across 23 units. The centre is anchored by a 1,690 sq m gross Waitrose foodstore. Other key retailers represented include Boots, New Look, WH Smith and Country Casuals.

4.20 Maidenhead Street represents another key shopping area with retailers such as Woolworths, Clinton Cards and Edinburgh Woollen Mill occupying units. To the south of the centre, Fore Street is characterised by a number of multiple restaurant operators and drinking establishments.

Stevenage

4.21 Stevenage is designated as a Major town centre in the East of England Plan (2008). The centre is located between J7 and J8 of the A1(M) (approximately 25km north west of Hoddesdon) and displays a classic New Town design with the town centre contained within a surrounding ring-road network.

4.22 Stevenage has approximately 81,674 sq m retail floorspace, almost half of which is within one the town's three managed shopping centres. Queensway was the original shopping centre which opened in 1959. The 12,077 gross sq m centre is relatively dated and is occupied by national multiple including Woolworths, Boots and Superdrug. The Westgate Centre (6,967 sq m gross), situated to the north of Queensway, opened in 1988 and is occupied by retailers such as River Island, Dorothy Perkins, Burton and Bay Trading.

4.23 The Forum Shopping Park is the most recent of the three and was developed in two phases, in 1990 and 1997. The centre comprises a total floorspace of 22,296 sq m gross and includes a mix of unit sizes and retailers such as TK Maxx, New Look, Bhs, Staples, HMV, Waterstones and Sports World. A 6,065 gross sq m Tesco Extra foodstore also forms part of the centre.

Lakeside

4.24 Lakeside is recognised as a regional shopping centre in the East of England Plan (2008). The shopping centre which is located in Thurrock, Essex opened in 1990 and presently comprises approximately 130,798 gross sq m across 310 units. The out-of-centre development is a highly popular retail and leisure destination, anchored by House of Fraser, Debenhams and Marks & Spencer. The centre offers a range of retailer types which includes Bhs, Woolworths, Primark, Gap, H&M and Lillywhites.

Hatfield

4.25 Hatfield is located approximately 19km west of Hoddesdon and is recognised as a town centre in the retail hierarchy. The centre comprises a gross retail floorspace 55,788 sq m which is contained within the surrounding primary road network and is largely traffic-free. To the west, the centre is anchored by an Asda foodstore. Extending east from Asda, shops include a range of high street multiples such as Boots, Superdrug and Iceland. Elsewhere, the retail offer comprises a mix of low-end multiple retailers and independent operators and there is a limited fashion offer.

4.26 There is a Factory Outlet Centre known as The Galleria which is located out of the main centre and in close proximity to the A1(M). There is a greater range of fashion retailers on offer at the centre in contrast to the offer in Hatfield town centre. Retailers represented at The Galleria include TK Maxx, Oasis, Lee Cooper and Pilot as well as other multiple factory outlet stores. It is likely that the identified expenditure presently drawn from the survey area to Hatfield is absorbed by The Galleria.

Watford

4.27 Watford is situated approximately 37km west of Waltham Cross and benefits from close proximity to the M25 and M1. Watford has a total retail floorspace of approximately 144,678 sq m gross with two main shopping centres located towards the south east of the centre. The Council-owned Charter Place originally opened in 1979, underwent refurbishment in 1993 and comprises circa 13,285 sq m gross floorspace. The Harlequin is a larger, more modern shopping centre which is the prime pitch for retailing in Watford. The centre opened in 1990 and has been extended twice and offers approximately 67,352 sq m gross retail floorspace across over 130 units. The centre is anchored by John Lewis and other retailers include Marks & Spencer, Bhs, Primark, Zara and Boots.

4.28 The town centre also benefits from a more traditional high street shopping environment along High Street and Market Place. There is also The Parade situated within the northern portion of the town which offers a range of eateries and drinking establishments, as well as some retail and services outlets, which complement the more mainstream retail offer concentrated within the shopping centres. There is also a 2,743 sq m Sainsbury's and an Iceland foodstore centrally located within the town centre.

Bluewater

4.29 Bluewater Shopping Centre in Dartford is situated approximately 52km to the south east of Waltham Cross. Bluewater is a landmark shopping destination which benefits from close proximity to the M25. The centre opened in 1999 and comprises approximately 144,018 sq m gross floorspace across 324 units. The centre comprises a triangle of malls anchored by John Lewis, House of Fraser and Marks and Spencer. Other retailers in the centre include Next, Boots, Gap, WhSmith and Topshop.

4.30 Overall Bluewater performs a prominent role as shopping and leisure destination of regional significance and further growth is unlikely to significantly increase existing impacts experienced by the centres in Broxbourne.

Pipeline Developments

4.31 We have identified a number of pipeline schemes within the competing centres which will have the effect of consolidating their retail offer and enhancing their market share. In the absence of development in Broxbourne these schemes will enhance their trade draw from the catchment area and the market share of the Broxbourne centres is likely to decline.

4.32 In terms of forthcoming retail floorspace, there is one significant retail scheme in the pipeline for ***Harlow***. Full planning permission has recently been granted for an 11,612 sq m gross (125,000 sq ft) extension to the Harvey Centre to provide new Debenhams department store and additional unit shops. A developer has now been selected for the scheme known as the Market Square Quarter which will redevelop the northern parts of the town centre. It is anticipated that work will commence of the retail-led scheme late 2009.

4.33 A number of development sites have also been identified in ***Welwyn Garden City*** with proposals for a northern extension to the Howard Centre likely to create approximately 9,290 sq m gross additional retail floorspace and include a Marks & Spencer anchor store. We are also aware that full planning permission has been granted for the redevelopment and extension of the existing Sainsbury's store to create an additional 1,950 sq m gross retail floorspace. Consent has also been granted for 929 sq m gross extension to the Waitrose store on Bridge Road. The Council are also in the process of preparing a development brief outlining proposals for a 11,148 sq m gross scheme at the Cereal Partners / Roche sites which includes potential for a new superstore. In total, the above pipeline schemes have the potential to create 23,317 sq m gross additional retail floorspace in the centre.

4.34 In ***Hertford*** we are aware that Sainsbury's are re-designing their proposals at McMullens Yard in Ware, and that Asda are also preparing a development in Watton Road. Proposals submitted by Tesco for a major expansion of its existing store on the former Christ's Hospital playing fields on Ware Road, were refused by the East Herts Council in September 2008.

4.35 ***Stevenage*** Borough Council is currently pursuing a regeneration strategy for the town centre in partnership with developer's Stanhope and ING Real Estate. An outline planning application was submitted to the Council in November 2007 proposing approximately 18,580 sq m additional retail floorspace as part of a wider 28,520 sq m redevelopment scheme incorporating residential and leisure uses as well as new civic facilities and a replacement bus station.

4.36 ***Hatfield*** is identified as a centre for major growth and there are plans for the large scale regeneration to improve the town centre. Proposals for a mixed-use scheme will redevelop 3.3 hectares of land in the east of the town centre with approximately 14,864 sq m net additional retail floorspace. Such a development may ultimately increase the overall trade draw from the centres in Broxbourne.

4.37 ***Watford*** Borough Council has appointed Capitol Shopping Centres (CSC), owners of The Harlequin to redevelop and update Charter Place as part of further expansion of The Harlequin Centre. A planning brief for the site was adopted by the Council in March 2006 and the redevelopment of the centre is high on the Council's corporate priorities. It is likely that the redevelopment will create an estimated 18,580 sq m gross additional floorspace for retail, leisure and community uses. There are also plans for development at Watford Junction Station to include residential, office, community facilities, hotel and some retail floorspace although an application is yet to be submitted.

4.38 There are long-term plans to extend ***Lakeside Shopping Centre*** by approximately 23,225 sq m gross although the future of the proposals remains uncertain at present. Lakeside performs a prominent role as shopping and leisure destination of regional significance and further growth is unlikely to significantly increase existing impacts experienced by the centres in Broxbourne.

4.39 There are presently no retail developments in the pipeline for ***Bluewater*** or ***Enfield***.

Summary

- Enfield, Harlow and Welwyn Garden City are identified as Broxbourne's key competing centres in terms of scale and market share. It is evident from the telephone survey results that 34.4% of all respondents last shopped for comparison goods in Enfield, Harlow or Welwyn Garden City.
- With the core catchment area (Zones 1-4) Broxbourne town, district and Out of Town Centre retains only 35.8% of total available comparison goods expenditure, whilst 38.2% leaks to major competing shopping destinations.

- Overall, Broxbourne's main centres are clearly performing at a lower level to surrounding competing centres, in accordance with their position in the sub-regional and local retail hierarchy. Competing centres benefit from a superior retail offer which is not currently matched by the centres in Broxbourne.
- Significant retail developments in the pipeline have been identified in Harlow, Hatfield, Hertford, Stevenage, Watford and Welwyn Garden City. It is likely that the combined effect of these could reduce Broxbourne's global market share further. It is possible for Broxbourne to enhance trade retention and market share through new retail development.

5. HODDESDON TOWN CENTRE

5.1 Hoddesdon is one of two designated Town Centres in Broxbourne Borough, the other being Waltham Cross. Situated towards the north of the Borough, the centre is highly accessible from the Dinant Link Road (A1170) and the Great Cambridge Road (A10) which spans the length of the Borough on a north/south axis.

Diversity of Uses

5.2 The Experian Goad Town Centre Category Report (November, 2006) identifies a total of 35,600 sq m of floorspace for retail trade and services, comprising 175 units[1] in Hoddesdon town centre. Table 5.1 below highlights the composition of the centre by the number of units, compared to the average of all UK centres audited by Goad.

Table 5.1: Hoddesdon Town Centre Retail Composition by Number of Units

Retail Category	No. of Units	% of Total	UK Average (%)	Variance
Comparison	47	26.86	35.47	-8.62
Convenience	11	6.29	8.71	-2.42
Service	87	49.71	45.72	3.99
Vacant	28	16.00	9.92	6.08
Miscellaneous	2	1.14	0.17	0.97
Total	175	100	100	-

Source: Experian Category Report (November, 2006)

5.3 As the table above demonstrates, the centre is under represented by comparison and convenience retailers compared to the national average. On closer analysis it is evident that the comparison offer is largely limited to ladies wear and accessories, gift and greeting card shops, charity shops and chemists/drugstores. The centre is lacking provision of menswear, childrenswear, DIY and home improvement, music and video recordings and telephones and accessories. With regard to convenience goods, there is good provision of supermarkets, convenience stores and bakers but no representation by CTNs, grocers, delicatessens, fishmongers or health foods.

5.4 There is above average representation in the service category with particularly high provision in health and beauty and fast food take away outlets. There is also above the average number of

[1] It is important to note that the floor space figures derived from the Experian Goad Plan only show the footprint of units, within the building lines, and do not provide a definitive figure of net or gross floorspace. They do not for example audit retail floorspace above ground floor level, apart from in enclosed shopping centres.

property service operators and high street banks which are noticeably concentrated towards the south of the High Street.

Retailer Representation

5.5 Hoddesdon is a traditional market town. The centre displays a mixture of historic features as well as more modern additions to the built form including the town's single shopping centre, The Tower Centre. Located north of the High Street, the semi-enclosed centre originally opened in 1949 with a retail floorspace of approximately 8,826 sq m net however, it is presently undergoing redevelopment and refurbishment and will incorporate a 1,579 sq m extension. Upon completion, the shopping centre will total approximately 10,405 sq m retail floorspace. The tenant schedule is unavailable at the current time but existing key retailers in the centre include Woolworths and Argos.

5.6 Hoddesdon is a linear centre with additional retail provision distributed along the traffic-restricted High Street which extends south of the Tower Centre. A weekly open market operates on Mondays and Wednesdays with approximately 50 stalls set up outside the Tower Centre and distributed along the High Street. It is also evident from the telephone survey results that 18% of visitors only visit Hoddesdon on market days.

5.7 There is some presence of multiple comparison retailers in the town centre including Boots, New Look, Peacocks and Clinton Cards as well as multiple service operators Café Nero and major high street banks, HSBC, Barclays and Abbey. There is also a Tesco Express on High Street, an Aldi store to the rear of the Tesco and a 2,787 sq m net Sainsbury's supermarket to the east of High Street.

5.8 The Sainsbury's foodstore, previously situated at Fawkon Walk, relocated to its new site at Brewery Road in 2003. The store provides a range of non-food goods and there is an in store deli, bakery, hot food counter, fishmonger, butcher as well as a pharmacy, café and a petrol station facility. The store also provides a large car park for customers and visitors to the town centre. Further to this, retail provision in the town centre is supplemented by a range of independent traders and specialist retail outlets which compliment the traditional characteristics of the town. There are also a noticeable number of restaurants and eateries which contribute towards a modest evening economy.

Retailer Demand

5.9 Table 5.2 shows that retailer demand in Hoddesden has fallen since it peaked at 13 in 2002 and 2003. Since then, demand has remained relatively low, fluctuating between 8 and 10 requirements. At present (May 2008), Focus Property Intelligence database identifies 8 requirements for Hoddesdon town Centre which is one less than the 9 in October 2007.

Table 5.2: Hoddesdon Retailer Requirements

No. of Requirements	Ranking (1st Highest)	Date
9	643	Oct O7
10	616	Oct 06
8	670	Oct 05
8	650	Oct 04
13	440	Oct 03
13	405	Oct 02

Source: Focus Property Intelligence (May 2008)

5.10 Table 5.3 provides a more detailed picture of the 8 registered retailer requirements for Hoddesdon[2] in May 2008. The majority of the requirements are from comparison retailers and include clothing retailers Billabong and Bon Marche. There are also requirements from two charity shops, Scope and British Heart Foundations as well as In Store, a homewares outlet.

5.11 The single convenience requirement is from the multiple bakery chain Gregg's and the remaining service requirements are from Subway and the licensed premises chain, Barracuda Group.

Table 5.3: Hoddesdon Retailer Requirements by Use Category and Floorspace (sq m)

Use Category	No. of Requirements	Min. Floorspace (sq m gross)	Max. Floorspace (sq m gross)
Comparison	5	1,491	3,391
Convenience	1	74	111
Service	2	177	975
TOTAL	**8**	**1,742**	**4,478**

Source: Focus Property Intelligence (May 2008)

Vacant Retail Property

5.12 Table 5.4 shows that at the time of the survey undertaken by Experian Goad in November 2006 there were 28 vacant units in Hoddesdon town centre, which equates to a vacancy rate of 16% and is well above the 9.92% national average. In terms of retail floorspace, 10% of floorspace in Hoddesdon is vacant which is above the national average of 8.08% but this can be largely attributed to vacancies at the Tower Centre which is currently being redeveloped.

[2] It is important to note that some of the requirements indicated may be for out-of-centre floorspace.

Table 5.4: Hoddesdon Town Centre Vacancies

Vacant Units	% of Total Units	UK Average (%)	Vacant Floorspace (sq m)	% of Total Floorspace (Sq m)	UK Average (%)
28	16.00	9.92	3,586	10.07	8.08

Source: Experian Category Report (November, 2006)

5.13 Since November 2006, there has been a fall in the number of vacant units. At the time of our site visit in May 2008 we identified a total of 21 vacant units, with the majority concentrated within the Tower Shopping Centre, presently undergoing refurbishment. A number of newly reconfigured units are currently being marketed with floorspace areas ranging between 27 sq m and 938 sq m.

5.14 Across the rest of the town centre a number of previously vacant units have been occupied. This has presented four additional comparison retailers including an independent clothes retailer and a charity shop; and two additional service operators, a café and hair salon, to the town's overall retail composition. There are however four new vacant units following the loss of three independent comparison retailers and the Woolwich bank. We are also aware that the Co-op are intending to vacate their 2-floor unit on High Street but we are unaware of any plans for re-occupation.

Environmental Quality

5.15 The town centre offers an overall pleasant and attractive shopping environment. The High Street is partially pedestrianised with traffic restrictions in place and the pavements are maintained to a high standard. There is good provision of street furniture including a range of seating, bins and signage as well as trees and planting. At the time of our site visit the centre was clean and there was no evidence of graffiti or littering.

5.16 The front façade of the Tower Centre has been refurbished and there are on-going works to modernise the interior of the centre to create a more attractive shopping environment. The market place to the front of the Tower Centre contributes a pleasing focal point with seating around a central clock tower feature. Across other parts of the centre, shop fronts are generally well maintained; although the quality of units does diminish slightly further south along High Street where there is a concentration of fast food take away outlets. Building types vary from traditional historic types to semi-modern precinct-style developments with the majority being 2-3 storeys in height. There is some provision for outdoor eating and drinking which create a more vibrant street scene.

Accessibility

5.17 Hoddesdon benefits from close proximity to the major road network though the Borough with directs links to the A10 along the Dinant Link Road (A1170) which sits north of the town centre boundary. As highlighted by table 5.5, there are seven car parks located in the town centre which are easily accessible from the surrounding road network. There are traffic restrictions along the main shopping section of High Street although there is provision for disabled parking and some short-stay on-street parking towards the south of High Street which is accessible off Charlton Way. There are good pedestrian links between the car parks and the main high street.

Table 5.5: Hoddesdon Car Park Provision

Car Park	No. of Spaces (Approx)
Tower Centre	200
Sainsbury's	200
Aldi	100
Iceland	40
Burford Street	50
Taveners Way North	40
Taveners Way South	30
Total	**660**

Source: Goad (November 2006)

5.18 The nearest national rail station is Rye House approximately 2km (1.3 miles) north-east of the town centre which provides regular services to London Liverpool Street within 35 – 40 minutes as well as local links to stations at Broxbourne, Cheshunt and Waltham Cross. There is no bus service from directly outside the station, however there is a bus stop in close proximity at Rye Park on Rye Road which is served by two routes (No. 392 and C3) into Hoddesdon town centre. Broxbourne rail station is also situated in close proximity, approximately 3.2 km (2 miles) south of the town centre with direct links to London Liverpool Street or Cambridge and two bus routes (No. 323 and 324) connecting the station with the town centre.

5.19 Table 5.6 highlights that 70% of visitors choose to travel to Hoddesdon by car whereas only 10% use the bus, walk or use a taxi to reach the centre.

Table 5.6: Choice of travel to Hoddesdon Town Centre

Choice of Travel	% Visitors
Car / Van	70.0
Bus	10.0
Walk	10.0
Taxi	10.0
Train	0.0
Other	0.0

Source: Household Telephone Survey (April 2008)

Safety and Occurrence of Crime

5.20 The Council recognises the need to create and maintain safe shopping environments and supports a number of objectives set out in the Broxbourne Crime and Disorder Reduction Partnership (CDRP) Strategic Assessment 2008/09. In summary, objectives broadly seek to reduce crime, manage offenders, tackle drugs, alcohol misuse and anti-social behaviour and improve feelings of safety in the community.

5.21 There is presently no fixed CCTV system in Hoddesdon although the CDRP operate five mobile systems which are used to target anti-social behaviour and enviro-crime, and which can be deployed to various locations on demand. The CDRP have also approved a multi-agency night time economy plan aimed at reducing offences in the evening economy, particularly those fuelled by alcohol consumption.

Customer Views and Behaviour

5.22 The household telephone survey identifies some key customer views about Hoddesdon town centre. The survey highlights that 10.8% of respondents visit Hoddesdon most often over other centres in the Borough. These respondents were asked the main reason for visiting the centre, to which 63.4% indicated main food shopping. Other reasons for visiting the centre include for top up food shopping (29%), financial services (17.6%) and for clothing and footwear (16%) goods.

5.23 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.

5.24 In terms of frequency of visits, the survey indicates that 38.2% respondents visit Hoddesdon 2-3 times a week, 29% visit once a week but only 9.9% visit once a day. The remaining respondents visit once a fortnight or less often. When asked about what would increase the frequency of visits, 32.8% suggested more non-food stores and 22.9% indicated more department stores.

Catchment / Market Share

5.25 In order to review the catchment area and market share of Hoddesdon Town Centre we have drawn on the results of the household telephone survey. No in-centre survey in Hoddesdon was undertaken as part of this assessment. Hoddesdon is located within Zone 1 of the household telephone survey, and it is evident from our analysis that it performs the role of a key local centre for those residing in the northern parts of the Borough.

5.26 Not surprisingly, the centre has the greatest influence within Zone 1, attracting 13% comparison goods expenditure from the immediate surrounding population. The centre has the strongest influence on non-food shopping patterns in Zones 1, 2, and 5 (Table 5.7). The centre has only minimal influence, 0.3% or less, over Zones 3, 4 & 6-12. Hoddesdon has no market share in Zone 4. Plan 5 illustrates Hoddesdon's comparison goods catchment area based on these figures.

Table 5.7: Hoddesdon Town Centre Comparison Goods Market Share

Zone	Comparison Goods Market Share (%)
1	13.0
2	5.5
3	1.2
5	2.7
6	0.3
7	0.2
8	0.3
9	0.3
10	0.2
11	1.5
12	1.7

Source: Household Telephone Survey (April 2008)

5.27 The population of the centre's catchment area (Zones 1, 2 & 5) is currently 49,208. Based on the comparison goods market share figures set out in Table 5.8 it is evident that Hoddesdon has a total shopping population from within this defined catchment area of 10,432. Within the core area (zones 1-4) Hoddesdon has a comparison goods market share of 4%. Across the full retail survey area, (Zones 1-12) Hoddesdon has a comparison goods market share of just 1.6%.

5.28 We have undertaken a more detailed review of the survey results in Hoddesdon's wider catchment area involving Zones 1, 2, 3, 5, 11, and 12. This reveals that the town centre has particular influence on shopping patterns in the 'domestic appliances', 'entertainments/electricals', 'personal/luxury goods' and 'furniture' categories. The centre plays a lesser role in terms of 'clothing/footwear' and DIY/decorating' categories.

Table 5.8: Hoddesdon Town Centre Comparison Goods Market Share by Goods Category

	Zone 1	Zone 2	Zone 3	Zone 5	Zone 11	Zone 12
Clothing / Footwear	2.1	0.0	1.1	3.3	1.1	2.1
Furniture / Floor Coverings / Household Textiles	10.8	1.3	0.0	1.4	0.0	2.5
DIY / Decorating	4.5	2.4	0.0	0.0	1.1	2.4
Domestic Appliances	13.9	6.1	1.3	1.2	3.4	2.5
Entertainment / Electricals	15.5	2.4	0.0	2.6	2.4	2.5
Personal / Luxury Goods	23.9	14.6	2.6	4.1	1.2	0.0

Source: Household Telephone Survey (April 2008)

5.29 It is evident from our analysis of the household telephone survey that Hoddesdon is more dominant in the catchment area in respect of food shopping. The centre is anchored by a modern Sainsbury's foodstore and there is also a Lidl, Tesco Express, Iceland and Netto within the town centre. This provision has a strong influence over food shopping patterns in Zones 1, 2 and 5 and to a lesser extent Zones 4, 8 and 12 (Table 5.9). Hoddesdon has minimal influence on convenience shopping patterns in Zones 3, 10 and 11, and 0% market share in Zones 6, 7 and 9. It is clear that the core catchment is constrained in large to Zone 1 and this is illustrated on Plan 6.

Table 5.9: Hoddesdon Town Centre Convenience Goods Market Share

Zone	Convenience Goods Market Share (%)
1	68
2	28
3	3
4	4
5	13
8	4
10	1
11	3
12	9

Source: Household Telephone Survey (April 2008)

5.30 Based on the convenience goods market share figures set out in the table above, Hoddesdon has a total convenience goods shopping population from within this defined catchment area of 27,764 which is significantly higher than that identified for comparison goods. Within the full retail study catchment area (Zones 1-12) Hoddesdon has a market share of 8%; and within the full extent of its defined catchment area (Zones 1-5, 8 and 10-12) it has a convenience goods market share of 11%. Within Zone 1, the centre's core catchment area, it has a market share of 68%.

5.31 Table 5.10 below highlights competing foodstores with a market share from Zone 1. It is evident from the telephone survey that the Sainsbury's in Hoddesdon has the largest market share and that the nearest competing foodstores are the Tesco at Brookfield with a 8.1% market share and the Tesco on Ware Road, Hertford with 6.1% market share from Zone 1.

Table 5.10: Other competing foodstores for main food shopping in Zone 1

Foodstore	Market Share (%)
Sainsbury's, Brewery Road, Hoddesdon	62.6
Tesco Extra, Brookfield	8.1
Tesco, Ware Road, Hertford	6.1

Source: Household Telephone Survey (April 2008)

Summary

5.32 Overall, Hoddesdon is considered a key centre in the north of the Borough. The centre has a strong convenience and service provision which provides choice to the visiting population. The comparison sector is weaker, particularly in the clothing and fashion categories, and there is only marginal representation of key multiple retailers in the town. The Tower Centre has a high number of vacancies. However, on-going refurbishment works will create larger units which can better accommodate contemporary retailer needs. Overall, vacancies levels have fallen since 2006 although retail requirements for the centre have remained relatively static at a low level. The centre has an attractive, historic environment and supports a moderate evening economy.

6. WALTHAM CROSS TOWN CENTRE

6.1 Waltham Cross is one of two designated Town Centres in the Borough of Broxbourne. The centre is located towards the south of the Borough and rests on the boundary with the neighbouring London Borough of Enfield authority. The town benefits from good accessibility with direct connections to the Borough's major road link, the A10, along Winston Churchill Way (A121) which runs along the north and west of the town centre boundary.

Diversity of Uses

6.2 The Experian Goad Town Centre Category Report (November, 2006) identifies a total of 39,612 sq m of floorspace for retail trade and services, comprising 163 units[3] in Waltham Cross. Table 6.1 highlights the composition of the centre by the number of units, compared to the average of all UK centres audited by Goad.

Table 6.1: Waltham Cross Town Centre Retail Composition by Number of Units

Retail Category	No. of Units	% of Total	UK Average (%)	Variance
Comparison	75	46.30	35.47	10.82
Convenience	16	9.88	8.71	1.17
Service	69	42.59	45.72	-3.13
Vacant	2	1.23	9.92	-8.69
Miscellaneous	0	0.00	0.17	-0.17
Total	162	100	100	-

Source: Experian Category Report (November, 2006)

6.3 As the table above demonstrates, the centre is well represented by comparison retailers with 46% provision compared to the national average of 35.47%. There is also above average representation by convenience retailers but less than the average number of service operators.

6.4 On closer analysis, the comparison provision is particularly dominated by ladies and menswear, footwear, greeting cards, telephones and the toiletries, cosmetics and beauty product retail categories. The convenience category is well represented by bakeries, butchers, convenience stores as well as two shoe repair and key cutting outlets and three supermarkets. The service provision is largely dominated by health and beauty operators, travel agents, retail banks and employment

[3] It is important to note that the floorspace figures derived from the Experian Goad Plan only show the footprint of units, within the building lines, and do not provide a definitive figure of net or gross floorspace. They do not for example audit retail floorspace above ground floor level, apart from in enclosed shopping centres.

services. There is below the national average number of cafes, restaurants, fast food take-aways and public houses.

Retailer Representation

6.5 The town centre is a linear development of retail units distributed along the pedestrianised High Street and the Pavilions Shopping Centre which extends west off High Street. The shopping centre which originally opened in 1973, comprises 15,143 sq m net retail floorspace across 62 units. Retailers in the centre include major operators WH Smith, Boots, Argos, New Look and a 1,532 sq m net Sainsbury's supermarket. Other major operators in the centre include Fishpools furniture which occupies two large units on High Street and there is also a Woolworths and Iceland which occupy similarly large units. A street market operates on Wednesdays and Fridays with approximately 50 stalls selling a variety of goods. It is evident from the telephone survey results that 21.6% of visitors to Waltham Cross only visit on a market day.

6.6 To the north of High Street there are two large retail warehouses occupied by Homebase and Wickes both of which are included in the town centre boundary.

Retailer Demand

6.7 There are presently (May, 2008) 7 retailer requirements in Waltham Cross for a maximum floorspace of 4,515 sq m gross. Table 6.2 highlights that the majority of the requirements are from comparison retailers which include multiple retailers, the Body Shop and discount retailer TK Maxx amongst others. There is a requirement from Phones 4 U, although it is likely that this has been recently fulfilled as the retailer now occupies the former Going Place unit on High Street. The remaining requirements are from two service operators, Costa Coffee and Subway.

Table 6.2: Waltham Cross Retailer Requirements by Use Category and Floorspace (sq m)

Use Category	No. of Requirements	Min. Floorspace (sq m gross)	Max. Floorspace (sq m gross)
Comparison	5	1,737	4,283
Convenience	0	0	0
Service	2	130	232
TOTAL	**7**	**1,867**	**4,515**

Source: Focus Property Intelligence (May 2008)

6.8 There is no historic data recording the varying level of requirements for Waltham Cross.

Vacant Retail Property

6.9 Table 6.3 shows that at the time of the survey undertaken by Experian Goad in November 2006 there were just 2 vacant units in Waltham Cross town centre, which equates to a vacancy rate of 1.23% which is significantly below the national average of 9.92%. In terms of retail floorspace, 0.84% of floorspace in Waltham Cross is vacant which is again well below the 8.08% national average.

Table 6.3: Waltham Cross Town Centre Vacancies

Vacant Units	% of Total Units	UK Average (%)	Vacant Floorspace (sq m)	% of Total Floorspace (Sq m)	UK Average (%)
2	1.23	9.92	334	0.84	8.08

Source: Experian Category Report (November, 2006)

6.10 Since November 2006, however there has been a rise in the number of vacant units. At the time of our site visit in May 2008 we identified a total of 9 vacant units with a noticeable concentration of six vacant units located towards the northern parts of High Street including the former McDonalds (c.780 sq m gross over two floors). The present vacant floorspace in Waltham Cross has therefore increased to approximately 1,990 sq m gross since November 2006.

Environmental Quality

6.11 Waltham Cross town centre is comprised of a varied range of building types, the majority of which are 2-3 storeys in height and many are now somewhat dated. The size of units also varies across the town centre with the largest occupied by Fishpools Furniture. Other large units include the Sainsbury's and TFC supermarkets, Woolworths, Iceland and the Gala Clubs Bingo building. The quality of shop fronts and fascias also varies with some evidence of new fascias adjacent to others which are less well maintained or out-dated including Woolworths and the TFC supermarket both of which would benefit from aesthetic enhancement.

6.12 The Pavilions Shopping Centre is a dominating brick precinct development reaching 5 storeys in height and includes at least three floors of residential units and a car park. The interior is characteristic of a modern shopping centre. There is just one vacant unit in the shopping centre, situated along the Eleanor Cross Road frontage. The majority of the shopping centre units are generally well maintained with evidence of some new fascias along the High Street frontage.

6.13 Much of the town centre is pedestrianised and the paving appears to be well maintained. There are a number of large brick planters as well as trees distributed along High Street which adds greenery to the street scene and creates a more attractive environment. There is also good provision of seating, lighting and bins and at the time of our site visit the centre was generally clean. A historic monument stands at the junction between High Street and Eleanor Cross road which contributes an interesting focal feature to the environment.

6.14 The quality of the environment remains pleasant where the pedestrianised zone ceases and there is some provision for outdoor eating and drinking associated with the cafes located in this part of the centre. There continues to be adequate provision of seating areas and trees which balance the introduction of vehicles onto the scene.

Accessibility

6.15 Waltham Cross benefits from good access to the road network with direct links to the A10 along Winston Churchill Way and Monarchs Way (A121) at key junctions at both the north and south of High Street. As highlighted by table 6.4, there are five car parks located within easy reach of the main High Street. There are also three further car parks at the Wickes, Homebase and Iceland stores.

Table 6.4: Waltham Cross Car Park Provision

Car Park	No. of Spaces
Pavilions Shopping Centre	400
Sturlas Way	50
Swan Road	60
High Street	180
Eleanor Cross Road	100
Homebase	200
Wickes	100
Iceland	30
Total	**1,120**

Source: Goad, November 2006

6.16 There are also good rail links to the town centre via Waltham Cross railway station which is located to the east of the town centre within walking distance of the town centre along Eleanor Cross Road. There are regular direct services to both London and Cambridge in addition to more local destinations including Cheshunt and Enfield Lock. The bus station is situated nearby, off Eleanor Cross Road and adjacent to the Pavilions Shopping Centre. The bus station is served by 18 different routes supporting good access to the town centre by public transport from the surrounding areas.

6.17 Table 6.5 demonstrates that the majority of visitors to the centre choose to travel by car (44.4%) whilst 29.6% travel by bus and 22.2% walk to the centre. Despite the rail links, the results of the household survey suggest that no shoppers use this method to travel to Waltham Cross.

Table 6.5: Choice of travel to Waltham Cross Town Centre

Choice of Travel	% Visitors
Car / Van	44.4
Bus	29.6
Walk	22.2
Taxi	0.0
Train	0.0
Other	3.7

Source: Household Telephone Survey (April 2008)

Safety and Occurrence of Crime

6.18 The Council recognises the need to create and maintain safe shopping environments and supports a number of objectives set out in the Broxbourne Crime and Disorder Reduction Partnership (CDRP) Strategic Assessment 2008/09. It seeks to reduce crime, manage offenders, tackle drugs, alcohol misuse and anti-social behaviour and improve feelings of safety in the community.

6.19 Towards achieving these objectives, the Council operate a fixed fully functional monitored CCTV system in Waltham Cross currently comprising 13 cameras. This is further supplemented, when necessary, by five mobile systems performing a range of functions to target anti-social behaviour and enviro-crime. The CDRP have also approved a multi-agency night time economy plan aimed at reducing offences in the evening economy, particularly those fuelled by alcohol consumption.

6.20 At present, the CDRP is developing a multi-agency response to a dedicated policing plan for Waltham Cross which will include development of a locality policing patrol base and further development of the town centre's CCTV system to target known 'hotspots'. The Council is also seeking to achieve the Safer Car Park accreditation in the Council-owned car parks in the centre.

Customer Views and Behaviour

6.21 The household telephone survey provides some insight into the customer views and behaviour towards Waltham Cross town centre. The results of the survey identify that 10.4% of respondents visit Waltham Cross most often over other centres in the Borough. These respondents were asked the main reason for visiting the centre, to which 44.4% indicated clothing, footwear and other fashion goods. Other main reasons for visiting the centre include for main food shopping (27.8%) and top up food shopping (23%), personal/luxury goods (12.7%) and financial services (10.3%). The survey also highlights that 4.8% visit for DIY and decorating goods and 3.2% visit for the market.

6.22 In terms of the night time economy, it is evident from the results of the household telephone survey that only 4.9% of respondents in Zone 4 visit Waltham Cross most often for pubs/clubs; 4.9% visit for restaurants; and 2.9% visit for evening entertainment in general.

6.23 In terms of frequency of visits, the survey indicates that 26.2% respondents visit the town centre once a week whilst 17.5% visit once a fortnight and 15.1% visit once a month. Marginally fewer respondents indicated that they are likely to visit once a day (11.9%) and 2-3 times a week (12.7%). The remaining respondents visit once a fortnight or less often. When asked about what would make them visit more often, 15.9% suggested more non-food stores and 10.3% indicated more department stores whilst the majority highlighted nothing (64.3%).

Catchment / Market Share

6.24 In order to review the catchment area and market share of Waltham Cross Town Centre we have drawn on the results of the household telephone survey. No in-centre survey in Waltham Cross was undertaken as part of this assessment. Waltham Cross is located within Zone 4 of the household telephone survey, and it is evident from our analysis that it is a key centre for the south of the Borough. The centre's core catchment is its location zone, Zone 4 which attracts 21%. Waltham Cross also influences non-food shopping patterns across Zones 2-9 (Table 6.6) which encompasses all zones within the southern portion of the survey area. The centre's influence also extends further north attracting between 0.4% and 1.8% from Zones 1, 11 and 12. Waltham Cross's catchment area, based on the figures in Table 6.6, is illustrated on Plan 7.

Table 6.6: Waltham Cross Town Centre Comparison Goods Market Share

Zone	Comparison Goods Market Share (%)
1	1.8
2	5.1
3	13.1
4	21.1
5	2.8
6	12.4
7	5.0
8	3.8
9	2.1
10	0.4
11	1.0
12	1.3

Source: Household Telephone Survey (April 2008)

6.25 The population of the centre's catchment area (Zone's 1-12) is currently 341,711. Based on the comparison goods market share figures set out in Table 6.7 it is evident that Waltham Cross has a total shopping population from within this defined catchment area of 21,937. Waltham Cross has an 11.8% market share within the core area (Zones 1-4). Within the full survey area (Zones 1-12) the centre has a comparison goods market share of 6.3%.

6.26 A more detailed review of the survey results from Zones 2-9, considered Waltham Cross's catchment area, reveals that the town centre has the greatest influence on 'DIY / decorating' and the 'furniture' categories particularly over Zones 3, 4 and 6. The centre has some influence in shopping patterns for all other categories with least influence over 'entertainments / electricals'.

Table 6.7: Waltham Cross Town Centre Comparison Goods Market Share by Goods Category

	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Clothing / Footwear	2.1	4.4	10.5	0.0	6.4	1.1	2.2	0.0
Furniture / Floor Coverings / Household Textiles	16.4	29.3	31.6	13.9	23.7	16.9	15.6	4.7
DIY / Decorating	24.7	61.9	61.6	8.9	39.8	6.0	2.2	18.0
Domestic Appliances	2.4	7.9	15.0	0.0	6.4	2.6	0.0	2.4
Entertainment / Electricals	1.2	4.1	15.8	0.0	4.1	0..0	0.0	0.0
Personal / Luxury Goods	1.2	9.0	21.7	1.4	13.3	6.3	3.7	0.0

Source: Household Telephone Survey (April 2008)

6.27 It is evident from our analysis of the household telephone survey that Waltham Cross is much less dominant on the catchment area in respect of food shopping. Sainsbury's in the Pavilions Shopping Centre is the main foodstore in the centre which has a relatively minimal influence over Zones 2-8 although it is clear that the core catchment is largely constrained to the location zone (Table 6.8). Waltham Cross's catchment area, based on these figures is illustrated on Plan 8.

Table 6.8: Waltham Cross Town Centre Convenience Goods Market Share

Zone	Convenience Goods Market Share (%)
2	1
3	2
4	13
6	2
7	4
8	2

Source: Household Telephone Survey (April 2008)

6.28 Based on the convenience goods market share figures set out in the table above, it is evident that Waltham Cross has a total convenience goods shopping population from within the defined catchment area of 9,097 which is lower than that identified for comparison goods. Within the full retail study catchment area (Zones 1-12) Waltham Cross has a market share of just 3%; and within the full extent of its defined catchment area (Zones 2-4, and 6-8) it has a convenience goods market share of 4%. Within Zone 4, the centre's core catchment area, it has a market share of 13%.

6.29 Table 6.9 below highlights competing foodstores with a market share from Zone 4. It is evident from the telephone survey that the Sainsbury's in Waltham Cross retains a similar market share to the Tesco store in Cheshunt but that the Tesco store at Brookfield is by far the dominant foodstore in the Zone.

Table 6.9: Other competing foodstores for main food shopping in Zone 4

Foodstore	Market Share (%)
Sainsbury's, Pavilion Centre, Waltham Cross	11.1
Tesco, Turners Hill, Cheshunt	10.1
Tesco Extra, Brookfield	50.5

Source: Household Telephone Survey (April 2008)

Summary

6.30 Overall, Waltham Cross plays a key role in providing a range of goods and services for the south of the Borough and the clothing and footwear offer performs a vital role in the town centre. The centre's retail offer includes a range of key multiple retailers supplemented by a number of independent operators. In contrast the convenience goods provision is limited to a small Sainsbury's foodstore in the Pavilions Shopping Centre and a range of smaller independent operators. It is also evident that the market plays an important role in the health of the centre.

6.31 There has been a noticeable increase in the number of vacant units in the centre, particularly towards the north of High Street. However, in general the centre appears to be well maintained and there is evidence of recent investment in the public realm to create a more pleasant shopping environment. However, an increase in vacant units in the north of the centre, detracts somewhat from the shopping environment and there is scope for potential redevelopment of this area.

7. CHESHUNT DISTRICT CENTRE

7.1 Cheshunt is situated within the south eastern portion of Broxbourne Borough, along the minor B176 route (Turners Hill) and approximately 1.6 km (1 mile) north of Waltham Cross town centre. The centre has developed around the junction between the B176 and the B198 (College Road) to the west and partially along Windmill lane to the east. Cheshunt is designated as a District Centre in the Broxbourne Local Plan.

Diversity of Uses

7.2 The Experian Goad Town Centre Category Report (April, 2006) identifies a total of 19,640 sq m of floorspace for retail trade and services, comprising 87 units[4] in Cheshunt. Table 7.1 highlights the composition of the centre by the number of units, compared to the average of all UK centres audited by Goad.

Table 7.1: Cheshunt District Centre Retail Composition by Number of Units

Retail Category	No. of Units	% of Total	UK Average (%)	Variance
Comparison	29	33.33	35.47	-2.14
Convenience	8	9.20	8.71	0.49
Service	49	56.32	45.72	10.60
Vacant	1	1.15	9.92	-8.77
Miscellaneous	0	0.00	0.17	-0.17
Total	87	100	100	

Source: Experian Category Report (April, 2006)

7.3 As the table above demonstrates, Cheshunt has above average representation of convenience outlets with 9.20% compared to 8.71%. There is also significantly high provision of service operators which represent 56.32% and is well above the 45.72% UK average. Comparison retailers are less well represented with just 33.33% which is below the 35.47% average.

7.4 Analysing the centre in more detail, the comparison offer largely comprises charity shops, florists, chemists and retailers operating in the footwear and household goods categories. In the convenience class order there are two bakeries, a butcher, two confectionary, tobacco and news outlets and a shoe repair/key cutting shop. There is also the Tesco metro store. The service

[4] It is important to note that the floorspace figures derived from the Experian Goad Plan only show the footprint of units, within the building lines, and do not provide a definitive figure of net or gross floorspace. They do not for example audit retail floorspace above ground floor level, apart from in enclosed shopping centres.

category is heavily dominated by property service retailers and banks and there is also above average representation of fast food take-away outlets and public houses.

Retailer Representation

7.5 In line with its designation as a District Centre, Cheshunt offers a range of local convenience goods and services to meet the needs of the surrounding communities. The centre is anchored by a reasonably sized Tesco Metro (1,323 sq m net) on Turners Hill. Additional retail is provided within much smaller unit shops offering a range of convenience goods and services including multiple high street banks, building societies, and estate agents as well as a range of independent operators.

7.6 Although not within the district centre boundary there is the additional attraction of the Grundy Park Leisure Centre which is situated to the east of Turners Hill and accessed off Windmill Lane.

Retailer Demand

7.7 Our search for retail requirements produced a list of high profile retail operators including the Body Shop, Billabong, LA Fitness and Liquid nightclubs. It is unlikely that these retailers would be seeking representation in Cheshunt district centre but are instead interested in the nearby Brookfield Centre development. We have therefore not been able to identify any known retailer requirements for Cheshunt district centre.

Vacant Retail Property

7.8 Table 7.2 presents the results of the survey undertaken by Experian Goad which identified a single vacant unit in Cheshunt in April 2006. This equates to a vacancy rate of 1.15% which is significantly below the national average, as is the 0.71% floorspace identified as vacant

Table 7.2: Cheshunt District Centre Vacancies

Vacant Units	% of Total Units	UK Average (%)	Vacant Floorspace (sq m)	% of Total Floorspace (Sq m)	UK Average (%)
1	1.15	9.92	139	0.71	8.08

Source: Experian Category Report (April, 2006)

7.9 Our site visit in May 2008 has identified a slight increase in the number of vacant units since 2006. There are presently five vacant units in Cheshunt, equating to approximately 890 sq m gross floorspace. Vacant units include three previously occupied by comparison operators and one former public house.

Environmental Quality

7.10 The environment in the district centre is heavily dominated by the main roads which run through it. There is a fountain feature and landscaping arranged on an island in the middle of the road junction which contributes an attractive focal feature. There is also some provision of trees and planting around the centre however, in general, the overall aesthetics of the centre could be improved.

7.11 Shop units are largely contained within precinct-style blocks that are 2-3 storeys in height with residential uses above. The quality of each precinct varies and many would benefit from refurbishment, particularly towards the south of the centre. There are some more modern units towards the north of the centre and some units in converted terraces and former dwellings, however in general the architecture is somewhat dated. The quality of shop fascias also varies with many that would benefit from enhancement.

7.12 There is some provision of seating, bins and cycle parking facilities. There is also on-street parking to the front of the precincts on College Road and Lynton Parade towards the south of Turners Hill. There are a number of pedestrian crossings however at the time of our site visit the centre was dominated by heavy traffic which created some obstacle for pedestrians and detracted somewhat from the overall shopping environment.

Accessibility

7.13 Cheshunt benefits from good accessibility from a variety of transport modes. Situated on a main route between Waltham Cross and the north of the Borough. Cheshunt benefits from good road links although at the time of our site visit there was some evidence of traffic congestion. The centre is well connected to the A10, situated to the west along College Road. Table 7.3 below shows the range of car parking provision in the centre which is supplemented by some on-street parking provision to the front of retail units.

Table 7.3: Cheshunt Car Park Provision

Car Park	No. of Spaces
Wolsey Hall	75
Grundy Park Leisure Centre	130
Newnham Parade	90
Tesco Metro	30
Total	**325**

Source: Goad, November 2006

7.14 Cheshunt rail station is located within walking distance of the district centre and offers direct services to London and links to the local rail network. There are also a number of bus stops located within the centre which are served by 8 routes and support good overall access by public transport. There are also some cycle parking facilities for those wishing to travel by this mode of transport.

Safety and Occurrence of Crime

7.15 The Council recognises the need to create and maintain safe shopping environments and supports a number of objectives set out in the Broxbourne Crime and Disorder Reduction Partnership (CDRP) Strategic Assessment 2008/09. In summary, objectives broadly seek to reduce crime, manage offenders, tackle drugs, alcohol misuse and anti-social behaviour and improve feelings of safety in the community.

7.16 Towards achieving these objectives, the Council currently operate a fixed fully functional monitored CCTV system in Cheshunt presently comprising 8 cameras. This is further supplemented, when necessary, by five mobile systems performing a range of functions to target anti-social behaviour and enviro-crime. Alcohol-related offences are also recognised as a particular problem in Cheshunt. In an attempt to overcome this, the Council has introduced an Alcohol Control Area in the centre and operate a system of fortnightly late night patrols of licensed premises. The CDRP have also approved a multi-agency night time economy plan aimed at reducing alcohol related crime and anti-social behaviour in the evening economy.

Customer Views and Behaviour

7.17 The household telephone survey provides some insight into the customer views and behaviour towards Cheshunt district centre. The results of the survey identify that just 4.8% of respondents visit Cheshunt most often over other centres in the Borough. These respondents were asked the main reason for visiting the centre, to which 56.9% indicated main food shopping.

7.18 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.

7.19 In terms of frequency of visits, the survey indicates that 27.6% respondents visit Cheshunt 2-3 times a week, 24.1% visit once a week and 15.5% visit everyday. The remaining respondents visit once a fortnight or less often. When asked about what would make them visit more often, 8.6% suggested more non-food stores and 5.2% indicated easier or more parking. 3.4% also indicated more specialist shops, cheaper parking and improved facilities.

Catchment / Market Share

7.20 We have drawn on the results of the household telephone survey in order to review the catchment area and market share of Cheshunt District Centre. An in-centre survey was not undertaken in the district centre as part of this assessment. Cheshunt is located within Zone 4 of the household telephone survey, and it is evident from our analysis that it performs the role of a convenient local service centre for the immediate surrounding neighbourhoods as well as passing vehicular trade.

7.21 As demonstrated by Table 7.4, Cheshunt has most influence over its location zone and adjacent Zones 2 and 3. It has a minimal market share in zones 5, 6, 9 and 12 and 0% market share in remaining zones. Plan 9 illustrates Cheshunt's catchment area.

Table 7.4: Cheshunt District Centre Comparison Goods Market Share

Zone	Comparison Goods Market Share (%)
2	2.6
3	3.9
4	4.1
5	0.2
6	0.7
9	0.4
12	0.9

Source: Household Telephone Survey (April 2008)

7.22 The population of the centre's catchment area (Zone's 2-6, 9 & 12) is currently 155,756. Based on the comparison goods market share figures set out in Table 7.4 it is evident that Cheshunt has a total shopping population from within this defined catchment area of 3,135. Within the core area (Zones 1-4) Cheshunt has a 3% market share. Within the full retail study catchment area (Zones 1-12) Cheshunt has a comparison goods market share of just 1%.

7.23 A more detailed review of the survey results of Cheshunt's catchment area reveals that the centre has no influence on 'clothing and footwear' and minimal influence on 'furniture'. There is some influence on shopping patterns in the 'DIY / decorating', 'domestic appliances', 'entertainments / electricals' and 'personal / luxury goods' categories but this is largely limited to Zones 2-4.

Table 7.5: Cheshunt District Centre Comparison Goods Market Share by Goods Category

	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 9	Zone 12
Clothing / Footwear	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Furniture / Floor Coverings / Household Textiles	0.0	0.0	3.9	0.0	1.3	0.0	1.3
DIY / Decorating	4.7	4.8	2.3	0.0	2.3	0.0	1.2
Domestic Appliances	3.7	2.6	5.0	0.0	0.0	0.0	0.0
Entertainment / Electricals	1.2	6.9	2.6	1.3	0.0	0.0	0.0
Personal / Luxury Goods	6.1	7.7	8.7	0.0	1.2	1.3	2.3

Source: Household Telephone Survey (April 2008)

7.24 Our analysis of the household telephone survey reveals a similarly limited catchment area for convenience goods shopping. Table 7.6 shows the greatest market share for convenience goods in Zones 2-6 with Zone 4 once again identified as the core catchment zone. The centre has just 1% market share in Zones 1, 7, 9, 11 and 12 and no influence in Zones 8 and 10. Plan 10 illustrates Cheshunt's catchment area for convenience goods.

Table 7.6: Cheshunt District Centre Convenience Goods Market Share

Zone	Convenience Goods Market Share (%)
1	1
2	12
3	11
4	21
5	7
6	14
7	1
9	1
11	1
12	1

Source: Household Telephone Survey (April 2008)

7.25 Based on the convenience goods market share figures set out in the table above, it is evident that Cheshunt has a total convenience goods shopping population from within the defined catchment area of 18,464 which is significantly higher than that identified for comparison goods. Within the full retail study catchment area (Zones 1-12) Cheshunt has a market share of 3%; and within the full extent of its defined catchment area (Zones 1-7, and 9-12) it has a convenience goods market share of 5%. Within Zone 4, the centre's core catchment area, it has a market share of 21%.

7.26 Table 7.78 below highlights competing foodstores with a market share from Zone 4. It is evident from the telephone survey that the Tesco store in Cheshunt retains a similar market share to the Sainsbury's in Waltham Cross but that the Tesco store at Brookfield is by far the dominant foodstore in Zone 4.

Table 7.7: Other competing foodstores for main food shopping in Zone 4

Foodstore	Market Share (%)
Tesco, Turners Hill, Cheshunt	10.1
Tesco Extra, Brookfield	50.5
Sainsbury's, Pavilion Centre, Waltham Cross	11.1

Source: Household Telephone Survey (April 2008)

Summary

7.27 Cheshunt is considered to be performing adequately as a district centre. There is limited provision of clothing and footwear outlets but Cheshunt appears to be relatively popular in other comparison goods categories and there are a number of units occupied by service operators.

7.28 We are not aware of any retail requirements for the centre and there has been a slight increase in the number of vacant units since 2006. We also consider that there is scope for some enhancement of the aesthetic qualities of the shopping environment. Overall, the centre performs an important role as an everyday service and foodstore shopping destination which is considered to be in accordance with its designation as a district centre.

8. BROOKFIELD OUT OF TOWN CENTRE

8.1 Brookfield is an out-of-town centre development situated to the west of Cheshunt and accessed directly off the A10 Great Cambridge Road.

Diversity of Uses

8.2 The Experian Goad Town Centre Category Report (April, 2006) identifies a total of 28,159 sq m of floorspace for retail trade and services across the 16 units[5] at the Brookfield Centre. Table 8.1 highlights the composition of the centre by the number of units, compared to the average of all UK centres audited by Goad.

Table 8.1: Brookfield Centre Retail Composition by Number of Units

Retail Category	No. of Units	% of Total	UK Average (%)	Variance
Comparison	9	56.25	35.47	20.78
Convenience	2	12.50	8.71	3.79
Service	4	25.00	45.72	-20.72
Vacant	1	6.25	9.92	-3.67
Miscellaneous	0	0.00	0.17	-0.17
Total	16	100	100	-

Source: Experian Category Report (April, 2006)

8.3 In comparison with the Goad town centre averages, the Brookfield Centre has above average representation by comparison and convenience retailers but less than the average provision of service outlets. This does not however take into consideration the opticians and pharmacy services located within the Tesco Extra foodstore.

Retailer Representation

8.4 The centre is divided into two distinct parts; the Brookfield Centre, which originally opened in 1983 and comprises a Tesco Extra and sizable Marks & Spencer store which are linked by four smaller units nestled between the two entrances. The Brookfield Retail Park rests towards the north-west of the Tesco store and west of the busy road link, Halfhide Lane. The retail park has a total floorspace of 7,280 sq m net across nine units currently let to high-street fashion retailers Next, Clarks, JD

[5] It is important to note that the floorspace figures derived from the Experian Goad Plan only show the footprint of units, within the building lines, and do not provide a definitive figure of net or gross floorspace. They do not for example audit retail floorspace above ground floor level, apart from in enclosed shopping centres.

Sports, Outfit, New Look, River Island, Clinton Cards and Thorntons. There is also an Argos and a Boots which occupy space in a separate block.

8.5 The Tesco Extra has a floorspace of approximately 8,152 sq m net although it 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.

8.6 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 is presently being re-furbished but is due to re-open again shortly. Outside the store and adjacent to the works currently being undertaken to the Tesco café, there are three smaller retail units occupied by an estate agents, a healthfood store and a Starbucks.

8.7 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.

Retailer Demand

8.8 Our search for retail requirements in Cheshunt identified seven high profile retailers who we consider would most likely be seeking representation at the present Brookfield Centre as opposed to the nearby Cheshunt district centre. Retailers with an interest in the area include comparison operators the Body Shop, Billabong, T-Mobile and Superdrug. In addition there are also requirements from a range of service retailers including, Venture UK Plc, Costa Coffee, the Barracuda Group, LA Fitness and Liquid nightclubs.

Vacant Retail Property

8.9 As Table 8.2 shows, at the time of the Experian Goad survey undertaken in April 2006, there was a single vacant unit on the Brookfield Centre complex. This equates to a vacancy rate of 6.25% which is below the national average. The floorspace of the vacant unit, at just 474 sq m, represents vacant floorspace total of 1.68 which is well below the nation average of 8.08%.

Table 8.2: Brookfield Centre Vacancies

Vacant Units	% of Total Units	UK Average (%)	Vacant Floorspace (sq m)	% of Total Floorspace (Sq m)	UK Average (%)
1	6.25	9.92	474	1.68	8.08

Source: Experian Category Report (April, 2006)

8.10 At the time of our site visit in May 2008, the unit previously identified as vacant by the Experian survey has now been let to Clarks and we did not identify any other vacant units on the site. In addition, works were being undertaken to refurbish the Tesco café unit and provide additional facilities in the form of a Telecoms Centre and a Tesco Direct 'Order & Collect' service centre.

Environmental Quality

8.11 The Brookfield Centre is characteristic of a modern out-of-centre retail park with large modern warehouse units and vast parking provision. There is some landscaping, planting and limited provision of outdoor seating to the front of the Tesco and Marks & Spencer stores. A number of smaller retail units rest in-between the entrances to the two anchor stores which creates a moderate sense of a street-scene. One unit is occupied by Starbucks and there are some outdoor tables and chairs for customers which adds an element of activity to the scene.

8.12 There is a noticeable hub of activity surrounding the bus stop and taxi rank which are located in front of the small retail units at the central point of the overall frontage. Additional seating for those waiting to be picked up would be beneficial as insufficient seating is currently provided.

8.13 We are aware that the Marks & Spencer unit has recently undergone both internal and external refurbishment which has included a new front façade and the retailer's most up-to-date fascia. Tesco is also presently undergoing improvement works to the front of its store. Planning permission was granted in February 2008 for an extension to the north western corner of the store incorporating a mezzanine floor, together with amendments to the building frontage on the south east elevation and improvements to the external elevations of the store.

Accessibility

8.14 Primary access to the Brookfield Centre is achieved directly off the A10 Great Cambridge Road. The centre is also accessible by a secondary route along the B156, Halfhide Lane. We are aware form our discussions with the local authority that there is frequent congestion at the junction with the A10, particularly at peak hours and seasonal times such as Christmas. There is free parking at both the Brookfield Centre and the retail park amounting to a total 2,163 spaces. There is also provision for cycle parking, a taxi rank and a bus stop situated in a central point between the Tesco and M&S stores. The centre is served by four bus routes (C1, C2, C3 & C4) to key local destinations including Goffs Oak, Turnford, Hoddesdon, Waltham Cross and Wormley as well as those outside the Borough including Herford and Harlow.

8.15 It is evident from the household telephone survey that 86.8% visitors to the centre choose to travel by car. Only a marginal 6.6% travel to the centre by bus and 2.7% walk.

Table 8.3: Choice of travel to the Brookfield Centre

Choice of Travel	%
Car / Van	86.8
Bus	6.6
Walk	2.7
Taxi	1.2
Train	0.0
Other	2.7

Source: Household Telephone Survey (April 2008)

8.16 Linkages between the two parts of the centre could be improved. A busy road separates the Brookfield Centre and the retail park which creates a barrier for pedestrians although there are two pedestrian crossings which provide safe crossing points. The arrangement of the centre is such that the retail park fronts onto the rear of the Tesco unit and pedestrians are required to walk around the side of the Tesco to reach the pedestrian crossings. There is no pedestrian access from the rear of the M&S unit. Discussion with the Local Authority suggests that it is common for many visitors to drive between the centre and the retail park instead of walking.

Safety and Occurrence of Crime

8.17 There are recognised issues of shoplifting, anti-social behaviour and vehicle crime at the Brookfield Centre which are priorities for the Neighbourhood Constables for North Cheshunt, Wormley and Turnford. There is also a mobile police station facility which is frequently set up at the centre to provide regular Police Surgeries for the residents of Broxbourne.

8.18 Overall, the Council recognises the need to create and maintain safe shopping environments and supports a number of objectives set out in the Broxbourne Crime and Disorder Reduction Partnership (CDRP) Strategic Assessment 2008/09. In summary, objectives broadly seek to reduce crime, manage offenders, tackle drugs, alcohol misuse and anti-social behaviour and improve feelings of safety in the community.

Customer Views and Behaviour

8.19 Results from the household telephone survey provide key customer views and behaviour towards the Brookfield centre. The survey identifies 53.7% of respondents visit Brookfield most often over other centres in the Borough. These respondents were asked the main reason for visiting the centre, to which 59.5% indicated clothing, footwear and other fashion goods and 44.9% indicated main food shopping.

8.20 In terms of frequency of visits, the results of the survey indicate 24% visit Brookfield once a week and 21.4% visit once a month. Interestingly only 0.8% visit once a day whilst 14.3% visit 2-3 times a week. The remaining respondents visit once a fortnight or less often. When asked about what would make them visit more often, 65.5 % suggested nothing although 10.5% suggested more department stores and 8.3% indicated more non-food stores.

Catchment / Market Share

8.21 We have drawn on the results of the household telephone survey in order to review the catchment area and market share of the Brookfield Centre. There has been no in-centre survey undertaken at Brookfield as part of this assessment. The Brookfield Centre is located within Zone 4 of the household telephone survey and close to the boundaries with Zones 2 and 3. It is evident from our analysis that Brookfield is a key shopping destination in the Borough. Table 8.4 highlights that Brookfield has a wide catchment area across all zones but bears the most influence in Zones 1-4. Brookfield's catchment area, based on these figures is illustrated on Plan 11.

Table 8.4: Brookfield Centre Comparison Goods Market Share

Zone	Comparison Goods Market Share (%)
1	10.1
2	18.0
3	18.2
4	19.1
5	4.6
6	6.0
7	3.3
8	2.0
9	4.8
10	3.7
11	5.1
12	7.9

Source: Household Telephone Survey (April 2008)

8.22 The population of the centre's catchment area (Zone's 1- 12) is currently 341,711. Based on the comparison goods market share figures set out in table 5.24 it is evident that Brookfield has a total shopping population from within this defined catchment area of 25,472, therefore within the full retail study catchment area (Zones 1-12) Brookfield has a comparison goods market share of 8%. In the core area (Zones 1-4) Brookfield has 17% comparison goods market share.

8.23 A more detailed review of the survey results in Brookfield's catchment area reveals that Brookfield's strongest influence is in the 'clothing / footwear' category. In comparison, the centre's influence on shopping patterns in the remaining categories is relatively minimal.

Table 8.5: Brookfield Centre Comparison Goods Market Share by Goods Category

	Zone											
	1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**
Clothing / Footwear	31.2	42.5	42.9	43.2	13.3	17.0	12.3	4.4	12.7	11.4	19.0	24.2
Furniture / Floor Coverings / Household Textiles	5.4	8.9	8.0	13.2	0.0	2.6	0.0	1.3	1.6	3.2	0.0	1.3
DIY / Decorating	0.0	2.4	1.2	0.0	0.0	1.1	0.0	0.0	0.0	0.0	0.0	0.0
Domestic Appliances	1.3	9.8	1.3	3.8	1.2	1.3	0.0	1.3	3.5	1.6	0.0	2.5
Entertainment / Electricals	1.4	9.8	5.5	7.9	2.6	1.4	1.5	1.3	1.5	1.7	0.0	2.5
Personal / Luxury Goods	4.5	12.2	19.2	17.4	2.7	3.6	0.0	1.2	2.7	0.0	1.2	3.5

Source: Household Telephone Survey (April 2008)

8.24 Our analysis of the telephone household survey reveals that Brookfield also has a wide catchment area for convenience shopping and as demonstrated by Table 8.6, Brookfield possesses a market share in each of the survey zones. The centre is most dominant in Zones 2-4 which are those within closest proximity. It has less influence on zones outside the Borough boundary with the lowest market share in Zone 8. Brookfield's catchment area is shown in Plan 12.

Table 8.6: Brookfield Centre Convenience Goods Market Share

Zone	Convenience Goods Market Share (%)
1	7
2	49
3	54
4	44
5	7
6	3
7	4
8	1
9	9
10	3
11	3
12	4

Source: Household Telephone Survey (April 2008)

8.25 Based on the convenience goods market share figures set out in the table above, it is evident that Brookfield has a total convenience goods shopping population from within the defined catchment area of 43,576 which is significantly higher than that identified for comparison goods. Within the total defined survey area (Zones 1-12) it has a convenience goods market share of 13%.

8.26 Table 8.7 below highlights competing foodstores with a market share from Zone 4. It is evident from the telephone survey that the Tesco store at Brookfield is the dominant foodstore in Zone 4 and that the Sainsbury's in Waltham Cross and Tesco in Cheshunt district centre have a similar yet much lower market share from the zone.

Table 8.7: Other competing foodstores for main food shopping in Zone 4

Foodstore	Market Share (%)
Tesco Extra, Brookfield	50.5
Sainsbury's, Pavilion Centre, Waltham Cross	11.1
Tesco, Turners Hill, Cheshunt	10.1

Source: Household Telephone Survey (April 2008)

Summary

8.27 Brookfield performs the role of an out of town centre, offering a range of mainstream multiple retailers and a major Tesco Extra store but lacks local service facilities which would reflect a fully functioning town centre as defined in PPS 6. The centre is the strongest shopping destination in Broxbourne Borough with a significant convenience goods market share in all zones in the survey area. Comparison goods provision is largely confined to fashion clothing and footwear and the centre has a market share in all zones in this sector.

8.28 The Tesco Extra is the largest store in the Borough and offers a range of non-food and convenience goods and services including an opticians and a pharmacy. The centre benefits from good parking provision although there are some congestion issues at peak times and poor pedestrian links between the Tesco/M&S and retail units at the Brookfield Retail Park. Despite these issues, the centre remains a popular choice by residents across the survey area.

9. CAPACITY PROJECTIONS

9.1 In this section we estimate the current performance of the four main centres in the Borough, Hoddesdon, Waltham Cross, Cheshunt and the Brookfield Centre, as the basis for forecasting the need for further retail floorspace to the period 2026, incorporating interim years of 2013, 2018 and 2023. The capacity tables accompanying this assessment are attached as Appendix 7 and 8.

9.2 We have 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 convenience and comparison goods expenditure which is available within the postcode areas comprising the Broxbourne survey area;
- Allocated the available expenditure to the convenience and 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 convenience and comparison retail floorspace, having regard to the performance of existing centres.

Data Inputs

i) Survey Area and Household Survey

9.3 In order to provide detailed factual information on the shopping patterns in Broxbourne we commissioned a new Household Interview Survey covering 1,200 households (April, 2008). GVA Grimley designed the survey questionnaire in consultation with Broxbourne Borough Council, and NEMS – who undertook the interviewing and data processing. The survey area is illustrated on Plan 2.

9.4 The survey identifies shopping habits of households for both convenience and comparison goods. Where necessary, the survey results have been rebased to remove inappropriate responses, such as ‘do not shop for particular goods’ and ‘internet shopping’. For convenience goods the survey included questions on main food and top up food shopping. The results if the two types of food expenditure were then merged through the application of a weight which reflects the estimated proportion of expenditure accounted for by each good type. For food we used a 75% main food / 25% top up food weighting. This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore, for each survey zone.

9.5 The survey also included five questions on specific comparison goods types which coincide with Experian Business Solutions definitions of comparison goods expenditure. The retail and needs modelling exercise uses the weighted averages of the Household Survey responses for each goods type based on the proportion of per capita expenditure on the goods type. This process will establish the pattern of spending for residents of each zone in terms of the following types of goods:

- Clothes and shoes;
- Furniture, floor coverings and household textiles;
- DIY and decorating goods;
- Domestic electrical appliances;
- Personal/luxury goods.

ii) Estimates of Population in the Survey Area

9.6 Population estimates and forecasts for each of the survey zones were prepared from the Experian E-Marketer in-house system. This provides estimates of population in 2008, 2013, 2018, 2023 and 2026. The Experian data is based on trend line projections and the 2001 census for small, localised areas. Overall, the population of the full survey area is currently 341,711, which includes areas beyond the Borough boundary. It is forecast to grow to 350,459 by 2013, 358,814 by 2018, 367,996 by 2023 and 373,855 by 2026. These figures represent an overall increase of 9.4% by 2026.

iii) Available Expenditure in the Survey Area

9.7 The Experian E-Marketer System provides estimates of the per capita expenditure for convenience and comparison goods in 2006 prices based on the ONS e-commerce Survey of Business. We have made deductions for special forms of trading which represents expenditure not available to spend in the shops, i.e. internet and catalogue shopping. We have applied individual per capita expenditure figures across each survey zone to provide a more detailed understanding of available expenditure in different parts of the catchment area.

9.8 In terms of expenditure growth in the area, we have drawn on convenience and comparison goods growth rates provided by Experian Business Strategies. These indicate that more growth will take place on comparison goods as opposed to convenience goods; the scope to purchase food is more limited than the scope to purchase non-food goods. Experian Business Strategies estimate a convenience growth rate of 0.7% per annum and a comparison goods growth rate of 3.8% per annum (Source: Experian Retail Planner Briefing Note 5.1, November 2007). We have generated expenditure by zone to highlight variations across the survey area.

9.9 We have used the forecast approach as set out in the Experian Retail Planner Briefing Note 5.1. Over the short to medium term, there are a number of economic trends that are and will impact on both comparison and convenience goods expenditure growth. Consumer confidence and spending is being affected by higher interest rates, lower house price inflation compared with the strong house price growth of the 1990s and early 2000s (which has resulted in lower equity withdrawal), high household debt, a low savings ratio and the rising cost of fuel and taxes generally.

9.10 The Experian economic-based growth forecasts reflect these factors, with an expected lower growth rate in comparison goods per capita expenditure, than their forecast a year ago. As such, we have maintained a growth rate of 3.8% for comparison goods and 0.7% for convenience goods over the LDF period to reflect growth forecasts. Evidently, as a consequence of economic changes, growth projections and forecasts will alter and should be monitored over the LDF period.

9.11 Table 3, Appendix 7, applies per capita expenditure within each zone to population forecasts, which indicates that total available convenience goods expenditure within the survey area is currently £577m. This is forecast to grow to £679.7m by 2023 and again to £705m by 2026, equating to an overall growth of 128m (22.2%) between 2008 and 2026.

9.12 In terms of comparison goods, total available comparison goods expenditure within the survey area is currently £1,044.3m, and is forecast to grow to £1,890.1m by 2023 and again to £2,147.1m by 2026. This equates to an overall growth of £1,102.7m (106%) between 2008 and 2026 (Table 3, Appendix 8)

iv) Floorspace Data

9.13 The comparison and convenience floorspace data used in our modelling has been drawn from a range of data sources including the Institute of Grocery Distribution (IGD), Broxbourne Borough Council and Experian Goad. Our floorspace assumptions for the foodstores include where appropriate an adjustment to identify the proportion of purely convenience goods floorspace as most superstores include a proportion of non-food floorspace. This accords with the expenditure data and the expenditure assumptions used.

Convenience Goods Floorspace Performance

9.14 Addressing each centre in turn, we review shopping patterns, the performance of existing convenience goods floorspace and highlight identified capacity. Modelling tables are set out in Appendix 7.

i) Hoddesdon Town Centre

9.15 We have estimated the trade draw of Hoddesdon town centre for convenience goods (Table 4, Appendix 7). This includes an estimation of the trade drawn to the Sainsbury's on Brewery Road, the Tesco on High Street and Aldi on Fawkon Walk as well as the combined draw of other smaller and independent convenience stores, and a total town centre convenience goods trade draw. The trade draw of the convenience stores in Hoddesdon town centre is made up of main food and top up food convenience goods shopping. 'Hoddesdon Local Stores' includes all other units in the town centre selling convenience goods, and generally comprise small scale and independent retailers including bakers and butchers.

9.16 It is evident from our analysis that the town centre convenience goods trade draw is relatively self contained (Plan 6). Hoddesdon is located in Zone 1 of the survey area, and as we would expect the highest convenience goods trade draw is in Zone 1 (68%). Food store provision in Hoddesdon also has a reasonable influence on shopping patterns in Zones 2 (28%) and Zones 5 (13%) but less influence on Zones 3, 4, 8, 10, 11 and 12 with market shares of 3%, 4%, 4%, 1%, 3% and 9% respectively.

9.17 We have analysed the trade draw to the Sainsbury's, Tesco and Lidl as well as other smaller and independent convenience goods stores in Hoddesdon town centre. It is evident that the Sainsbury's foodstore on Brewery Road has the strongest influence in Zone 1 (57%) and a lower market share in Zone 2 (21%) and Zone 5 (10%). In total we estimate that the store has a total convenience goods turnover of approximately £36.5m which equates to a sales density of circa £16,379 per sq m net. Compared to an average sales density for Sainsbury's of £9,204 per sq m net, this analysis indicates that the store is trading significantly above average levels.

9.18 Trade draw to the Tesco Express and Aldi stores in Hoddesdon is negligible in comparison, with each drawing no more than 3% across Zones 1-5. Trade draw to other smaller and independent convenience goods retailers have a slightly stronger influence in Zones 1 (8%) and 2 (4%) than the Tesco and Aldi stores. On closer analysis, this is largely as a result of 'top up' convenience goods shopping as opposed to main food shopping. Aside from the Sainsbury's, other foodstores in the centre cater principally for 'top up' convenience goods shopping and we forecast that collectively they achieve a turnover of approximately £10.5m, equating to an average turnover of £2,423 per sq m net. We consider this a relatively strong level of turnover for the local town centre convenience goods shops.

9.19 It is evident that Sainsbury's is the strongest performing foodstore in the town centre, with a turnover of £36.5m which equates to approximately 78% of the total turnover in Hoddesdon. Including the Sainsbury's, we estimate that the total convenience goods turnover in Hoddesdon town centre is currently £46.9m which equates to approximately 8% of the total available convenience goods expenditure in the survey area (Table 18, Appendix 7). Within the core catchment area (Zones 1-5, 8, 10-12), foodstores account for approximately 11% of total available convenience goods expenditure. Based upon a total net sales floorspace of approximately 6,544 sq m, Hoddesdon town centre currently has an average convenience goods sales density of £7,179 per sq m net. This is greater that our estimate of company average sales densities for the principal and local foodstores in the centre (£5,285 per sq m net), however this may be as a result of the significantly high performance of the Sainsbury's which somewhat masks the performance of other foodstores in the centre.

ii) Waltham Cross Town Centre

9.20 We have estimated the trade draw of Waltham Cross town centre for convenience goods (Table 6, Appendix 7). This includes an examination of the trade drawn to Sainsbury's in the Pavilions Centre as well as the combined draw of other smaller and independent convenience stores and the total town centre convenience goods trade draw. The trade draw of the convenience stores in Waltham Cross town centre is made up of main food and top up food convenience goods shopping. 'Waltham Cross Local Stores' includes all other units in the town centre selling convenience goods, and generally comprise small scale and independent retailers including bakers, butchers and greengrocers.

9.21 Town centre convenience goods trade draw is relatively constrained to the south of the Borough as illustrated on Plan 8. Waltham Cross is located in Zone 4 of the survey area, and as we would expect the highest convenience goods trade draw is in Zone 4 (12%). Food store provision in Waltham Cross also has some influence on shopping patterns in Zones 7 (4%) and minimal influence on Zones 2, 3, 6, and 8 with each drawing just 2% or less market share.

9.22 We have analysed the trade draw to the Sainsbury's and other smaller and independent convenience goods stores in Waltham Cross. It is evident that the Sainsbury's foodstore in the Pavilions Centre has strong influence in Zone 4 (57%) but considerably less influence over any other zones in the core catchment area. We estimate that the store has a total convenience goods turnover of approximately £11.8m which equates to a sales density of circa £7,718 per sq m net. This is somewhat below the average sales density for Sainsbury's (£9,204 per sq m net) and suggests that store is not performing to expectations.

9.23 There is only marginal trade draw to other smaller and independent convenience goods retailers in Waltham Cross, the majority of which is as a result of 'top up' food shopping. Closer analysis highlights that the Sainsbury's foodstore is also more popular for 'top up' food shopping than for main food shopping. It is clear therefore that foodstores in the centre predominantly cater for 'top up' needs and we forecast that they collectively turn over £14.6m which equates to an average turnover of £4,654 per sq m net and approximately 3% of the total available convenience goods expenditure in the survey area (Table 19, Appendix 7). Within the core catchment area (Zones 2-4, and 6-8), foodstores account for approximately 4% of total available convenience goods expenditure. Based upon a total net sales floorspace of approximately 3,146 sq m, Waltham Cross town centre currently has an average convenience goods sales density of £4,654 per sq m net. This is below our estimate of company average sales densities for the principal and local foodstores in the centre (£5,765 per sq m net) and highlights that foodstores in the centre are underperforming.

iii) Cheshunt District Centre

9.24 We have estimated the trade draw of Cheshunt District Centre for convenience goods (Table 8, Appendix 7). This includes an examination of the trade drawn to the Tesco Metro in addition to the combined draw of other smaller and independent convenience stores as well as the total town centre convenience goods trade draw. The trade draw of the convenience stores in Cheshunt is made up of main food and top up food convenience goods shopping. 'Cheshunt Local Stores' includes all other units in the town centre selling convenience goods, and generally comprises small scale and independent retailers including bakers and butchers.

9.25 As demonstrated by Plan 10, Cheshunt's convenience goods trade draw is relatively constrained to zones within, and to the east of the Broxbourne borough boundary. Cheshunt is located in Zone 4 of the survey area, and as we would expect the highest convenience goods trade draw is in Zone 4 (15%). Food store provision in Cheshunt also has some influence on shopping patterns in Zones 3 (14%) and 2 (5%) and minimal influence on Zones 1, 6, 7, 9 and 12 with each drawing just 1% market share.

9.26 We have analysed the trade draw to the Tesco Metro and other smaller and independent convenience goods stores in Cheshunt. It is evident that the Tesco Metro is strongest foodstore in Cheshunt accounting for 14% trade draw from Zone 4 and 11% of the trade draw from Zone 3. On closer analysis it is apparent that a significant proportion of this is as a result of top-up food shopping, particularly from Zone 4 but less so from Zone 3. We estimate that the store has a total convenience goods turnover of approximately £14.6m which equates to a sales density of circa £11,070 per sq m net. This is in accordance with the average sales density for Tescos (£10,873 per sq m net) and indicates that store is currently performing to expectations.

9.27 There is marginal trade draw to other smaller and independent convenience goods retailers in Cheshunt which is entirely as a result of 'top up' food shopping. It is clear therefore that foodstores in the centre predominantly cater for 'top up' needs and we forecast that they collectively turn over £16.5m which equates to an average turnover of £8,188 per sq m net and approximately 3% of the total available convenience goods expenditure in the survey area (Table 20, Appendix 7). Within the core catchment area (Zones 1-4, 6, 7, 9 and 12), foodstores account for approximately 5% of total available convenience goods expenditure. Based upon a total net sales floorspace of approximately 2,011 sq m, Cheshunt currently has an average convenience goods sales density of £8,188 per sq m net. This is almost on the mark with our estimate of company average sales densities for the principal and local foodstores in the centre (£8,008 per sq m net) and highlights that in convenience terms, Cheshunt is performing well and meeting expectations.

iv) Brookfield Centre

9.28 We have estimated the trade draw of the Brookfield Centre for convenience goods (Table 10, Appendix 7). This includes an examination of the trade drawn to the Tesco Extra and the Marks & Spencer Simply Food store and the combined total convenience goods trade draw of both. The trade draw of the two convenience stores at Brookfield comprises of main food and top up food convenience goods shopping.

9.29 Plan 12 demonstrates the dominance of Brookfield which has a significant market share in the three southern Zones within Broxbourne boundary as well as a degree of influence across all zones in the survey area. Brookfield is located on the border between Zone 2, 3 and 4, and as we would expect the highest convenience goods trade draw is from these Zones with draws of 49%, 54% and 44% respectively. The centre has a wide catchment area but the level of influence over shopping patterns in other zones is variably less, with a trade draw of 9% in Zone 9, 7% in Zones 1 and 5 and 4% or less in remaining zones.

9.30 We have analysed the trade draw to the Tesco Extra and the Marks & Spencer Simply Food store at Brookfield. It is evident that the Tesco Extra is the dominant foodstore at Brookfield and accounts for 45% trade draw from Zone 2, 51% from Zone 3 and 44% from Zone 4. On closer analysis it is apparent that a significant proportion of this is as a result of main food shopping and less so from top-up food shopping. We estimate that the store has a total convenience goods turnover of approximately £69.3m which equates to a sales density of circa £14,163 per sq m net. The Tesco store is therefore performing significantly above the average sales density for Tescos (£10,873 per sq m net).

9.31 In contrast, the Marks and Spencer Simply Food store has less influence over the survey area with 5% trade draw from Zone 2; 3% from Zone 3; 2% form Zone 10; and 1% from Zones 6 and 9. It has zero influence over all other Zones including Zone 4 despite being located on the border of this Zone. Closer analysis indicates that the store is more popular for main food shopping in Zones 2, 3, 9 and 10 but more likely to be used for top-up food shopping by those residing in Zones 1 and 6. We estimate that the store has a total convenience goods turnover of approximately £3.5m which equates to a sales density of circa £4,149 per sq m net. The M&S foodstore is therefore performing significantly below the average sales density for M&S (£10,710 per sq m net) but this is likely as a result of direct competition from the adjacent Tesco Extra.

9.32 It is evident that the Tesco Extra at the Brookfield centre is the dominating foodstore in the southern zones within Broxbourne boundary and that the adjacent M&S simply food store exerts significantly less influence. Overall, we forecast that they collectively turn over £72.7m which equates to an average turnover of £12,701 per sq m net (Table 21, Appendix 7). This accounts for approximately 13% of the total convenience goods expenditure which is greater than any other centre in the Broxbourne borough. Based upon a total net floorspace of approximately 5,727 sq m net, Brookfield currently has an average convenience goods sales density of £12,701 per sq m net which is above our estimate of company average sales densities for both foodstores in the centre (£10,849 per sq m net), reflecting the identified above average performance of the Tesco Extra.

Convenience Goods Capacity Forecasts

9.33 We consider that there will be surplus expenditure available to support further convenience goods floorspace in ***Hoddesdon*** between 2008 and 2026. Our projections are summarised in Table 18, Appendix 7, which indicates that by 2013 there will be £15m of residual expenditure to support new convenience goods floorspace. This is forecast to grow to £21.3m by 2023 and again to £23.5m by 2026. When converting this residual expenditure into floorspace we have incorporated a sales density of £10,000 per sq m net, a minimum level required by most major foodstore operators. On this basis, there is capacity for an additional 1,514 sq m net by 2013, growing to 2,134 sq m net by 2023 and again to 2,351 sq m net by 2026.

9.34 Our analysis predicts that there will be a shortfall in available expenditure and negative capacity to support further convenience goods floorspace in ***Waltham Cross*** town centre up to 2026. Our projections are summarised in Table 19, Appendix 7, indicating that by 2013 there will be -£2,680m of residual expenditure to support new convenience goods floorspace. This is forecast to decrease to -£1,815m by 2018, to -£797m by 2023 and eventually reach -£111m by 2026. When converting this residual expenditure into floorspace we have incorporated a sales density of £10,000 per sq m net, a minimum level required by most major foodstore operators. On this basis, there remains a negative capacity for additional convenience goods floorspace up to 2026.

9.35 We consider that there will be some surplus expenditure available to support a marginal increase in convenience goods floorspace in ***Cheshunt*** between 2008 and 2026. Our projections are summarised in Table 20, Appendix 7, which indicates that by 2013 there will be £1.4m of residual expenditure to support new convenience goods floorspace. This is forecast to grow to £3.5m by 2023 and again to £4.3m by 2026. When converting this residual expenditure into floorspace we have incorporated a sales density of £10,000 per sq m net, a minimum level required by most major foodstore operators. On this basis, there is only capacity for an additional 135 sq m net by 2013, growing to 352 sq m net by 2023 and to just 433 sq m net by 2026 and highlights the highly limited scope for provision of new convenience floorspace in the centre.

9.36 Our analysis has indicated surplus expenditure available to support additional convenience goods floorspace at the ***Brookfield Centre*** between 2008 and 2026 (Table 21 in Appendix 7). We project that by 2013 there will be £14.9m of residual expenditure to support additional convenience floorspace. We believe this will grow to £19.3m by 2018; to £24.4m by 2023; and again to £27.9m by 2026. When converting this residual expenditure into floorspace we have incorporated a sales density of £10,000 per sq m net, a minimum level required by most major foodstore operators. On this basis, we have identified capacity for an additional 1,489 sq m net by 2013, growing to 1,933 sq m net by 2018 and 2,444 sq m net by 2023 and reaching 2,790 sq m net by 2026. This indicates that there is some scope for convenience goods floorspace provision as part of the Greater Brookfield development outlined in the adopted Local Plan.

Comparison Goods Floorspace Performance

i) Hoddesdon Town Centre

9.37 We have estimated the trade draw of Hoddesdon town centre for comparison goods (Table 4, Appendix 8). It is evident that the comparison goods catchment of Hoddesdon is largely constrained to Zones 1 and 2. These are the zones closest to the town centre and reflect the settlement pattern in the catchment area and competing provision. The centre has its highest market share in Zone 1 (13%) which is also the zone in which it is located. Hoddesdon has a market share of 5.5% in Zone 2 and a market share between 1-3% in Zones 3, 4, 11 and 12. The town centre has a marginal market share (below 1%) in all other Zones (6-10) except Zone 4 where it has 0% market share. Plan 5 illustrates the extent of the centre's influence across the defined survey area and highlights variations in market share.

9.38 Hoddesdon town centre currently retains approximately 2%, or £17.1m of comparison goods trade within the study area. This equates to just 27% of the total town centre turnover but does not allow for any potential inflow from beyond the survey area boundary. With an estimated comparison goods turnover of approximately £17.1m and an existing shop floorspace of circa 8,798 sq m net, we estimate that Hoddesdon has a sales density of approximately £1,949 per sq m net. Based on our experience elsewhere, we consider the town centre is currently underperforming in the comparison sector and not adequately reflecting its designated position in the retail hierarchy.

9.39 In assessing capacity for future comparison goods floorspace in Hoddesdon, we have assumed that the efficiency with which the existing floorspace is being used will increase over time; we have assumed a 2% annual growth rate in existing sales per sq m. Drawing on our experience elsewhere in similar sized centres we have assumed that new floorspace should achieve a sales density of approximately £3,500 per sq m net also growing by 2% per annum.

9.40 This assessment has considered the effect of Hoddesdon maintaining its existing market share and used the projected growth in population and expenditure to support the development of new floorspace in the town centre. Hoddesdon could face increasing competition as identified pipeline schemes come forward in nearby centres such as Harlow and Hertford, therefore maintaining existing market share will become increasingly important.

ii) Waltham Cross Town Centre

9.41 Table 6, Appendix 8 outlines the estimated trade draw of Waltham Cross town centre for comparison goods. From our analysis, it is evident that the comparison goods catchment of Waltham Cross is largely constrained to southern parts of the survey area (illustrated by Plan 7). Waltham Cross is located in Zone 4 and as would be expected the highest market share in this zone (21.1%). The town centre also has ample market share in Zones 3 (13.1%) and 6 (12.4%) and a market share between 2%-5% in Zones 2, 5, 7, 8 and 9 and less than 2% in all remaining zones.

9.42 Waltham Cross town centre currently retains approximately 6%, or £65.7m of comparison goods trade within the survey area. This equates to 82% of the total town centre turnover. Further to this we have assumed a 5% inflow from beyond the survey area boundary which represents an additional £3.5m in 2008. On the basis of current market shares and inflow, we estimate that Waltham Cross town centre currently has a comparison goods turnover of approximately £69.2m (Table 16, Appendix 8). With an existing comparison floorspace of circa 22,260 sq m net, we estimate that Waltham Cross has a sales density of approximately £3,109 per sq m net. Based on our experience elsewhere, we consider that Waltham Cross is currently performing adequately but that it is likely that it will need to improve on its performance in order to maintain the current market share and estimated level of inflow.

9.43 In assessing capacity for future comparison goods floorspace in Waltham Cross, we have assumed that the efficiency with which the existing floorspace is being used will increase over time; for this we have assumed a 2% annual growth rate in existing sales per sq m. Drawing on our experience elsewhere in similar sized and centres we have assumed that new floorspace should achieve a sales density of approximately £3,500 per sq m net also growing by 2% per annum.

9.44 This assessment has considered the effect of Waltham Cross maintaining its existing market share and estimated inflow and used the projected growth in population and expenditure to support the development of new floorspace in the town centre. There is potential that Waltham Cross could face increasing competition from nearby centres in the wider sub-region, particularly Enfield, therefore maintaining existing market share will become increasingly important.

iii) Cheshunt District Centre

9.45 Table 8, Appendix 8 outlines the estimated trade draw of Cheshunt district centre for comparison goods. From our analysis, it is evident that the comparison goods catchment of Cheshunt is largely constrained to Zones 2, 3 and 4 in the immediate surrounding area of the centre as shown on Plan 9. Cheshunt is located in Zone 4 and as would be expected has the highest market share in this zone (4.1%). The market share in Zones 2 and 3 is 2.6% and 3.9% respectively. Cheshunt has less than 1% market share in Zones 5, 6, 9 and 12 and 0% market share in all other Zones.

9.46 Table 17, Appendix 8 highlights that Cheshunt currently retains just 1%, or £10.2m of comparison goods trade within the survey area. This equates to 38% of the centre's total turnover and does not allow for any inflow from beyond the survey area boundary. With an existing comparison floorspace of circa 4,459 sq m net, we estimate that Cheshunt has a sales density of approximately £2,293 per sq m net. Based on our experience elsewhere, we consider that the current performance of Cheshunt adequately reflects its position in the retail hierarchy.

9.47 In assessing capacity for future comparison goods floorspace in Cheshunt, we have assumed that the efficiency with which the existing floorspace is being used will increase over time; for this we have assumed a 2% annual growth rate in existing sales per sq m. Drawing on our experience elsewhere in similar sized centres we have assumed that new floorspace should achieve a sales density of approximately £3,500 per sq m net also growing by 2% per annum.

9.48 This assessment has considered the effect of Cheshunt maintaining its existing market share and used projected growth in population and expenditure to support the development of new floorspace in the centre. There is potential that Cheshunt could face increasing competition from nearby centres in the wider sub-region therefore maintaining existing market share will become increasingly important.

iv) Brookfield Centre

9.49 Table 10, Appendix 8 and Plan 11 demonstrate the estimated trade draw of the Brookfield centre for comparison goods. From our analysis, it is evident that the comparison goods catchment of Brookfield extends across the whole survey area with a concentrated market share in the Broxbourne Zones 1-4. Brookfield has the greatest market share in Zone 4 (19.6%) and a market share of 10.1%, 18% and 18.2% in Zones 1, 2 and 3 respectively. The centre also has a market share between 5% and 8% in Zones 6, 11 and 12 and between 2% and 5% in all other Zones.

9.50 Table 18, Appendix 8 shows that Brookfield currently retains 8%, or £79m of comparison goods trade within the survey area. This equates to 52% of the of the centre's total turnover. Further to this we have assumed a 5% inflow from beyond the survey area boundary which in 2008 represents an additional £4.1m. On the basis of current market shares and inflow, we estimate that Brookfield currently has a comparison goods turnover of approximately £83.12m (Table 18, Appendix 8). With an existing comparison floorspace of circa 15,985 sq m net, we estimate that Brookfield has a sales density of approximately £5,200 per sq m net. Based on our experience elsewhere, we consider that the centre is performing well and to a standard we would expect from a centre of its type and in view of the comparison retail provision on offer.

9.51 In assessing capacity for future comparison goods floorspace in Brookfield, we have assumed that the efficiency with which the existing floorspace is being used will increase over time; for this we have assumed a 2% annual growth rate in existing sales per sq m. Drawing on our experience elsewhere in similar sized and centres we have assumed that new floorspace should achieve a sales density of approximately £3,500 per sq m net also growing by 2% per annum.

9.52 This assessment has considered the effect of Brookfield maintaining its existing market share and inflow and used projected growth in population and expenditure to support the development of new floorspace in the centre. In view of identified retail schemes in the pipeline outside of the Borough, there is potential that Brookfield could face additional competition from centres in the wider sub-region, therefore maintaining existing market share and inflow will become increasingly important.

Comparison Goods Floorspace Performance

9.53 Based upon our assessment it is evident from Table 15, Appendix 8, that there will be capacity to support some additional comparison goods floorspace in ***Hoddesdon*** by virtue of growth in population and available expenditure. Based on current market share, we estimate that by 2013 there will be theoretical capacity to support an additional 455 sq m net of comparison goods floorspace, increasing to 1,766 sq m net by 2023 and again to 2,239 sq m net by 2026.

9.54 There are currently no commitments for additional retail floorspace in Hoddesdon which would require an allocation of identified residual capacity. In order to translate these floorspace projections into gross floorspace requirements, it is necessary to incorporate an appropriate net:gross ration. Conventionally, a figure of 65% is assumed which would equate to a gross floorspace of circa 700 sq m gross in 2013; 2,717 sq m gross by 2023; and 3,460 sq m gross by 2026.

9.55 Based upon our assessment it is evident from Table 16, Appendix 8, that there will be capacity to support some additional comparison goods floorspace in ***Waltham Cross*** by virtue of growth in population and available expenditure. Based on current market share, we estimate that by 2013 there will be theoretical capacity to support an additional 1,894 sq m net of comparison goods floorspace, increasing to 6,880 sq m net by 2023 and again to 8,793 sq m net by 2026.

9.56 There are currently no commitments for additional retail floorspace in Waltham Cross which would require an allocation of identified residual capacity. In order to translate these floorspace projections into gross floorspace requirements, it is necessary to incorporate an appropriate net:gross ration. Conventionally, a figure of 65% is assumed which would equate to a gross floorspace of circa 2,915 sq m gross in 2013; 10,584 sq m gross by 2023; and 13,528 sq m gross by 2026.

9.57 Based upon our assessment it is evident from Table 17, Appendix 8, that there will be capacity to support some additional comparison goods floorspace in ***Cheshunt*** by virtue of growth in population and available expenditure. Based on current market share, we estimate that by 2013 there will be theoretical capacity to support just 76 sq m net of additional comparison goods floorspace which increases to 1,048 sq m net by 2023 and again to 1,340 sq m net by 2026.

9.58 There are currently no commitments for additional retail floorspace in Cheshunt which would require an allocation of identified residual capacity. In order to translate these floorspace projections into gross floorspace requirements, it is necessary to incorporate an appropriate net:gross ration. Conventionally, a figure of 65% is assumed which would equate to a gross floorspace of circa 116 sq m gross in 2013; 1,613 sq m gross by 2023; and 2,062 sq m gross by 2026.

9.59 Based upon our assessment it is evident from Table 18, Appendix 8, that there will be capacity to support some additional comparison goods floorspace in ***Brookfield*** by virtue of growth in population and available expenditure. Based on current market share, we estimate that by 2013 there will be theoretical capacity to support an additional 2,141 sq m net of comparison goods floorspace. We project that this will increase to 8,412 sq m net by 2023 and again to 10,740 sq m net by 2026.

9.60 Aside from the local plan allocation for some additional retail floorspace as part of aspirations for Greater Brookfield which are discussed later, there are currently no confirmed commitments for additional retail floorspace in Brookfield which would require an allocation of identified residual capacity. In order to translate these floorspace projections into gross floorspace requirements, it is necessary to incorporate an appropriate net:gross ration. Conventionally, a figure of 65% is assumed which would equate to a gross floorspace of circa 3,294 sq m gross in 2013; 12,941 sq m gross by 2023; and 16,523 sq m gross by 2026.

Summary

9.61 Baseline capacity projections are based on current market shares, identifying capacity for new convenience and comparison goods floorspace by virtue of population and expenditure growth. We have also assumed a 5% inflow into the survey area for Waltham Cross and Brookfield, but have not incorporated any inflow into either Hoddesdon or Cheshunt. It is our understanding that there are no firm commitments for new convenience or comparison goods floorspace although we are aware that there is likely to be some additional provision incorporated in the emerging development proposals for Greater Brookfield.

9.62 Our summary of baseline capacity projections is outlined in the following tables:

Table 6.1: Convenience Goods Baseline Capacity Projections (£m)

Centre	2013 (£m)	2018 (£m)	2023 (£m)	2026 (£m)
Hoddesdon	15.1	18.0	21.3	23.5
Waltham Cross	-2.7	-1.8	-0.7	-0.1
Cheshunt	1.4	2.4	3.5	4.3
Brookfield Centre	14.9	19.3	24.4	27.9

Table 6.2: Convenience Goods Baseline Capacity Projections (sq m net)

Centre	2013 (sq m net)	2018 (sq m net)	2023 (sq m net)	2026 (sq m net)
Hoddesdon	1,514	1,805	2,134	2,351
Waltham Cross	-268	-182	-80	-11
Cheshunt	135	236	352	433
Brookfield Centre	1,489	1,933	2,444	2,790

Table 6.3: Comparison Goods Baseline Capacity Projections (£m)

Centre	2013 (£m)	2018 (£m)	2023 (£m)	2026 (£m)
Hoddesdon	1.8	4.5	8.3	11.2
Waltham Cross	7.3	17.3	32.4	44.0
Cheshunt	0.2	2.7	4.9	6.7
Brookfield Centre	8.3	21.1	39.6	53.7

Table 6.4: Comparison Goods Baseline Capacity Projections (£m)

Centre	2013 (£m)	2018 (£m)	2023 (£m)	2026 (£m)
Hoddesdon	455	1,049	1,766	2,249
Waltham Cross	1,894	4,054	6,880	8,793
Cheshunt	76	622	1,048	1,340
Brookfield Centre	2,141	4,964	8,412	10.740

10. CONCLUSIONS

10.1 Drawing on our qualitative review of existing provision and quantitative capacity forecasts, we summarise the key findings as follows:-

Hoddesdon

10.2 In terms of the diversity of uses, the number of comparison and convenience outlets are 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 is 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.

10.3 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.

10.4 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. Given its small scale, the Tower Centre redevelopment and renovation is, however, unlikely to result in a major step change in retail offer, which would be necessary to compete with higher order centres in the sub-region. At present, Hoddesdon has no higher order comparison retailers.

10.5 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. When asked what would make you visit Hoddesdon more often, 32.8% of respondents stated more non-food shops, 22.9% stated a department store, 9.2% stated more specialist shops and 7.6% stated more independent shops. Retail demand figures, however, demonstrate low (8-10 retailers) registered requirements for space in the centre.

10.6 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 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.

10.7 Hoddesdon has a tightly defined comparison goods catchment area, restricted to a 13% market share in Zone 1, the zone in which the town centre is located. Market share diminishes steeply beyond this catchment, to 5% in Zone 2 and 2.7% in Zone 5. By 2013 we forecast capacity for an additional 455 sq m net of comparison goods floorspace based on current market share. Evidently the centre's comparison goods role will face increasing competition from competing centres such as Harlow and Hertford, although the Tower Centre should assist in maintaining market share.

10.8 Given the good range of foodstores, the market share for convenience goods is stronger with a 68% market share in Zone 1, falling to 28% in Zone 2 and 13% in Zone 5. Market share falls off considerably in the remaining survey Zones. In Zone 1, competing foodstores include Tesco, Brookfield, and Tesco, Hertford; In Zone 2, shoppers are also travelling to Tesco, Brookfield and the Tesco stores in Hertford and Cheshunt; whilst in Zone 5 the key competing foodstores are located in and around Harlow.

10.9 In terms of foodstore capacity, Hoddesdon can accommodate 1,514 sq m net of convenience goods floorspace by 2013, growing to 2,134 sq m net by 2018, based on current market share. To put these figures into context the Sainsbury's foodstore is 2,230 sq m net (convenience) and the Sainsbury's store in the Pavilions Centre, Waltham Cross is 1,532 sq m net convenience. Given the leakage of trade to Brookfield, Hertford and Harlow, there are clearly opportunities to enhance market share and support additional floorspace above capacity forecasts if the opportunity arises.

10.10 Whilst Hoddesdon can accommodate net additional floorspace, aside from the Tower Centre, there are no evident development opportunity sites which could realistically accommodate significant retail floorspace of the scale identified in forecast capacity projections. Following detailed on site surveys and discussions with the Council, there are no opportunities to expand the primary shopping area/town centre boundary.

10.11 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.

Waltham Cross

10.12 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.

10.13 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. When asked where respondents undertook most of their shopping for clothing and footwear, 2.9% stated Waltham Cross. Within Zone 4, the zone in which Waltham Cross is located, 10.5% cited the town centre – significantly higher than Hoddesdon; whilst 45.2% stated Brookfield, and 11.6% cited Harlow.

10.14 The higher order comparison 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.

10.15 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. When asked what would make you visit Waltham Cross more often, the results included more non-food stores (15.9%), more department stores (10.3%), more specialist shops (5.6%), more independent shops (4%) and more foodstores (4%). Retail demand figures, however, demonstrate low (7 retailers) registered requirements for space in the centre.

10.16 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. It is evident from the results of the household telephone survey that only 4.9% of respondents in Zone 4 visit Waltham Cross most often for pubs/clubs; 4.9% visit for restaurants; and 2.9% visit for evening entertainment in general. The main competing destinations include Enfield and Cheshunt for restaurants; Cheshunt for pubs and London West End and Enfield for other general evening entertainment.

10.17 Waltham Cross has the strongest comparison goods catchment area compared to Hoddesdon and Cheshunt, which is consistent with its qualitative profile outlined above. The centre has a 21.1% market in Zone 4, the Zone in which it is located; and a 13.1% market share in Zone 3, and a 12.4% market share in Zone 6. The level of influence also extends into Zone 2, 5, 7 and 8. The centre has the strongest market share in the DIY/Decorating category which is consistent with the presence of Homebase and Wickes in the town centre. The comparison goods catchment is restricted by Brookfield, the out of town centre.

10.18 By 2013 we forecast capacity for 1,894 sq m net of comparison goods floorspace, increasing to 6,880 sq m net by 2018 based on current market share. Evidently, the centre's comparison goods market share will be impacted upon as a result of further retail development at Brookfield given the strong role of clothing and footwear in both centres.

10.19 Given the more limited nature of foodstores in Waltham Cross, the town centre's convenience goods market share is more limited than that for non-food, and more limited than Hoddesdon. Within Zone 4, Waltham Cross has a convenience goods market share of 13% which diminishes significantly to below 4% in the remaining survey zones. In Zone 4, competing foodstores include Tesco at Brookfield (50.5%) and the Tesco Metro in Cheshunt (4%).

10.20 In terms of foodstore capacity, it is clear that the Sainsbury's foodstore in the Pavilions Shopping Centre is underperforming, and as such there is negligible capacity for additional convenience goods floorspace over the LDF period. It should be highlighted that this is based on current market share, and given the considerable trade draw of the Tesco store at Brookfield there would be opportunities to claw back trade to support additional floorspace in Waltham Cross town centre.

10.21 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. The site is bound by Wickes, the High Street and Sturlas Way (See Appendix 3c) and Park Lane. 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.

10.22 Overall, the importance of clothing and footwear, and other comparison goods categories, are currently 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 would see increased competition and as a result lose some market share. This is mainly due to Waltham Cross falling with the same catchment area as Brookfield. However, over the plan period, with out without development at Brookfield, Waltham Cross will see retail growth.

10.23 The Council should consider policy options to enhance accessibility, improve the environment and support retail development on the Sturlas Way opportunity site. The introduction of an enhanced foodstore offer may be an appropriate policy option given the inevitable loss of comparison goods market share if Brookfield is implemented.

10.24 Given the scale of the proposed Brookfield development it will be particularly difficult for Waltham Cross to maintain comparison market share, and in accordance with PPS6 the Council will be required to promote and manage change. In line with national trends discussed in Section 3, this is likely to form 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. This is discussed further below.

Cheshunt

10.25 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 smaller independent retailers.

10.26 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%). Hoddesdon does provide a clothing and footwear offer, and when asked which centre they visit most often only 4.8% cited the town centre compared to 10.8% who stated Hoddesdon, 10.4% who stated Waltham Cross, and 53.7% who stated Brookfield.

10.27 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.

10.28 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.

10.29 As you would expect, based on the qualitative profile discussed above, Cheshunt has a limited and tightly defined catchment area. Within Zone 4, the district centre has a comparison goods market share of only 4.1%, diminishing to 3.9% in Zone 3. By 2013, we forecast capacity for an additional 76 sq m net of comparison goods floorspace, growing to 622 sq m net by 2018.

10.30 Evidently, given the qualitative composition and role of the centre, as well as the absence of any significant development opportunities we do not consider there is a need for additional floorspace above this level. Given the role of Waltham Cross and Brookfield within the same zone and catchment area, Cheshunt cannot and will not compete with the higher order shopping destinations.

10.31 In terms of foodstore capacity, Cheshunt can accommodate an additional 135 sq m net of convenience goods floorspace by 2013 growing to 236 sq m net by 2018. This is based on current market share and if the opportunity arises there is the opportunity for new foodstore development to increase market share to support additional floorspace. Nevertheless, development opportunities are limited, although the Tesco is trading well and there may be the potential to extend the store at some point in the future.

10.32 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 will not compete with Waltham Cross or Brookfield. Given its very different role, Cheshunt is less unlikely to complete directly with development at Brookfield, although the Council should use the Use Classes Order to control the spread of undesirable uses such as A5 fast food take-aways. Without policy control, 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

10.33 Brookfield performs the role of an out of town centre, offering a range of mainstream multiple retailers and a major Tesco Extra foodstore. There are no local service facilities which would reflect a fully functioning town centre as defined in PPS6. It is evident from the results of the household telephone survey that 59.5% of respondents visit Brookfield 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.

10.34 The comparison goods catchment area is wider than both Hoddesdon and Waltham Cross, although it remains relatively limited given the offer of just clothing and footwear. In Zone 4, the Zone in which the shopping destination is located, it has a market share of just 19.1%. This is lower than Waltham

Cross (21.1%) in the same zone. Elsewhere, Brookfield has a market share of 18.2% in Zone 3, 18% in Zone 2 and 10.1% in Zone 1. By 2013, we forecast baseline capacity of 2,141 sq m net of comparison goods floorspace growing to 4,964 sq m net by 2023. Evidently, this is based on current market share and the leakage of comparison goods expenditure to competing higher order centres, such as Enfield and Harlow, in the wider sub-region.

10.35 The Tesco Extra foodstore at Brookfield is the largest in the borough and has a strong influence on convenience shopping patterns. Within Zones 2, 3 and 4 the foodstore has a market share of 49%, 54% and 44% respectively. Beyond this catchment, market share diminishes to less than 9%. In terms of foodstore capacity, Brookfield can accommodate an additional 1,489 sq m net of convenience goods floorspace by 2013, growing to 1,933 sq m net by 2018. Again, this is based on current market share, and it is possible for capacity to be re-directed to centres such as Cheshunt and Waltham Cross - within the same catchment area - if the opportunity arises.

10.36 Brookfield is an out of centre shopping destination and does not currently perform the role of a town centre as defined in PPS6. Nevertheless there are long term development proposals for the area and the RSS states that the local authority should define the role of the centre, in particular to determine whether the centre should develop into one with a fuller range of service provision or remain purely a retail centre. We discuss this further below and test an increase in higher order shopping provision.

Scope for New Development

10.37 It is evident from our assessment that there is considerable leakage from the catchment area to competing shopping destinations. Within Zones 1-4 (which broadly reflect the borough boundary) the three town centres and Brookfield retain 35.8% of total available comparison goods expenditure, which is less than the amount leak to the major competing centres (38.2%) as discussed in Section 4. Within the full survey area (Zones 1-12) the Broxbourne centres retain only 16.5% whilst 55.8% leaks elsewhere.

10.38 Based on the existing centres and their current market shares, our assessment has identified capacity for an additional 4,566 sq m net of comparison goods floorspace by 2013, growing to 10,689 sq m net by 2018. Aside from the development opportunity in Waltham Cross, which is relatively constrained, we have identified no further development opportunity sites within Waltham Cross, Hoddesdon or Cheshunt to meet the need arising. In practice, the realistic capacity for new town centre type development in the existing centres is likely to be very limited. Given that the Borough's existing centres at Hoddesdon and Cheshunt cannot accommodate new retail development and that Waltham Cross can only accommodate limited retail development, the additional floorspace capacity identified could be met at Brookfield.

10.39 PPS6 urges local authorities to plan positively to meet identified retail and other main town centre needs. PPS6 and PPG13 also seek to achieve sustainable shopping patterns, to reduce the need to travel unnecessarily, and to provide an effective network of town, district and local centres. Where necessary, this process involves reviewing the role of different centres, and the scope to create new centres or expand existing out-of-centre facilities. The demand from retailers to locate in the borough is not present at the current time, and capacity forecasts are reasonably limited although this is based on the current network of centres and significant leakage from the borough. This is 'unsustainable' in national policy terms.

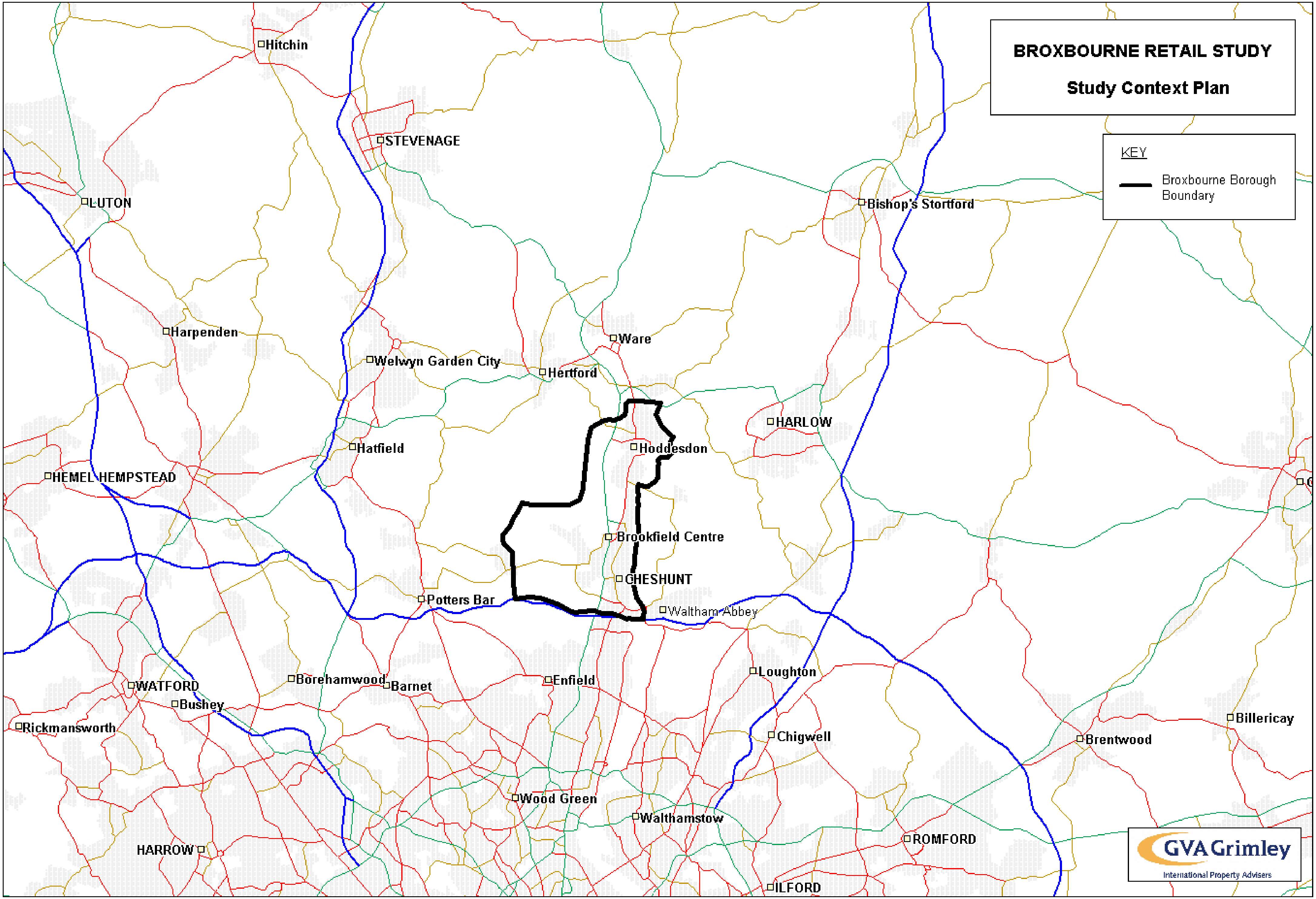
10.40 Any new retail development needs to be of a sufficient scale and critical mass to reduce the loss of trade from the borough to other centres in the sub-region, and increase the market share of the borough. It is unsustainable for shoppers from the CCA to be travelling to other centres in the sub region such as Harlow, Welwyn Garden City or Enfield for their comparison goods shopping needs. Work undertaken thus far clearly shows that whilst the existing centres of Cheshunt, Hoddesdon and Waltham Cross may see minor declines in market share as a result of any potential development at Brookfield, the borough as a whole would see a marked increase in local retail expenditure. This is due to the higher order retail offer that can be potentially delivered at Brookfield, which would entice residents of the borough and residents from the wider catchment to shop in Broxbourne.

10.41 Based on evolving policy, previous recommendations, existing retail provision, and physical constraints in the town centres Brookfield appears to be the location which can accommodate an expanding retail offer. Given reasonably limited capacity forecasts, this would need to be of a sufficient scale to claw back lost trade from competing centres. It is not the remit of this study to recommend an appropriate scale of development, however a further study has been commissioned by the Council which would consider a range of thresholds for development at Greater Brookfield and review the wider implications on retailing in the Borough.

PLANS

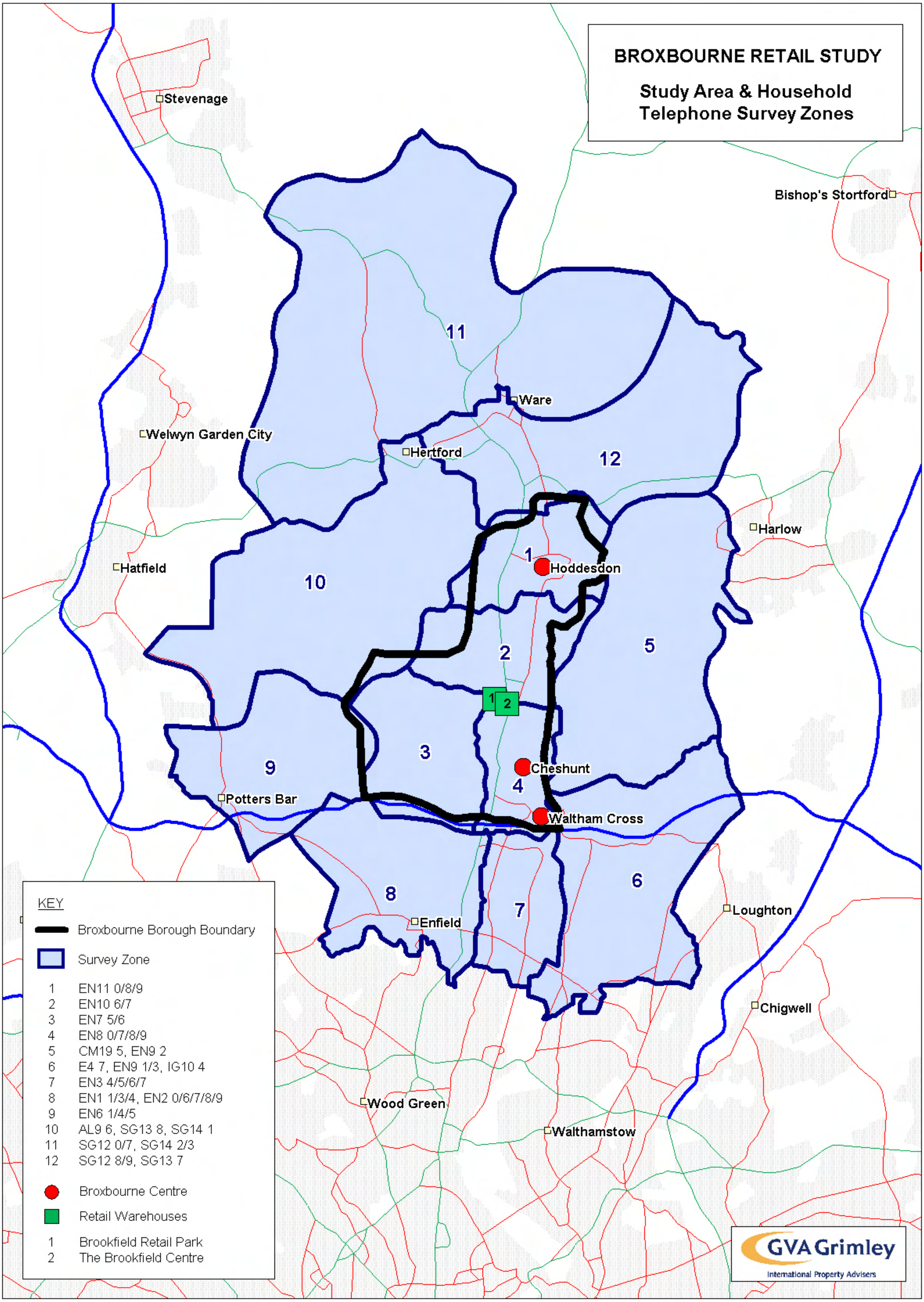
PLAN 1

STUDY CONTEXT PLAN


BROXBOURNE RETAIL STUDY
Study Context Plan
KEY
Broxbourne Borough Boundary
Hitchin
STEVENAGE
LUTON
Bishop's Stortford
Harpenden
Ware
Welwyn Garden City
Hertford
HARLOW
Hatfield
Hoddesdon
HEMEL HEMPSTEAD
Brookfield Centre
CHESHUNT
Potters Bar
Waltham Abbey
WATFORD
Borehamwood
Barnet
Enfield
Loughton
Bushey
Rickmansworth
Chigwell
Billericay
Brentwood
Wood Green
Walthamstow
HARROW
ROMFORD
ILFORD
GVA Grimley
International Property Advisers

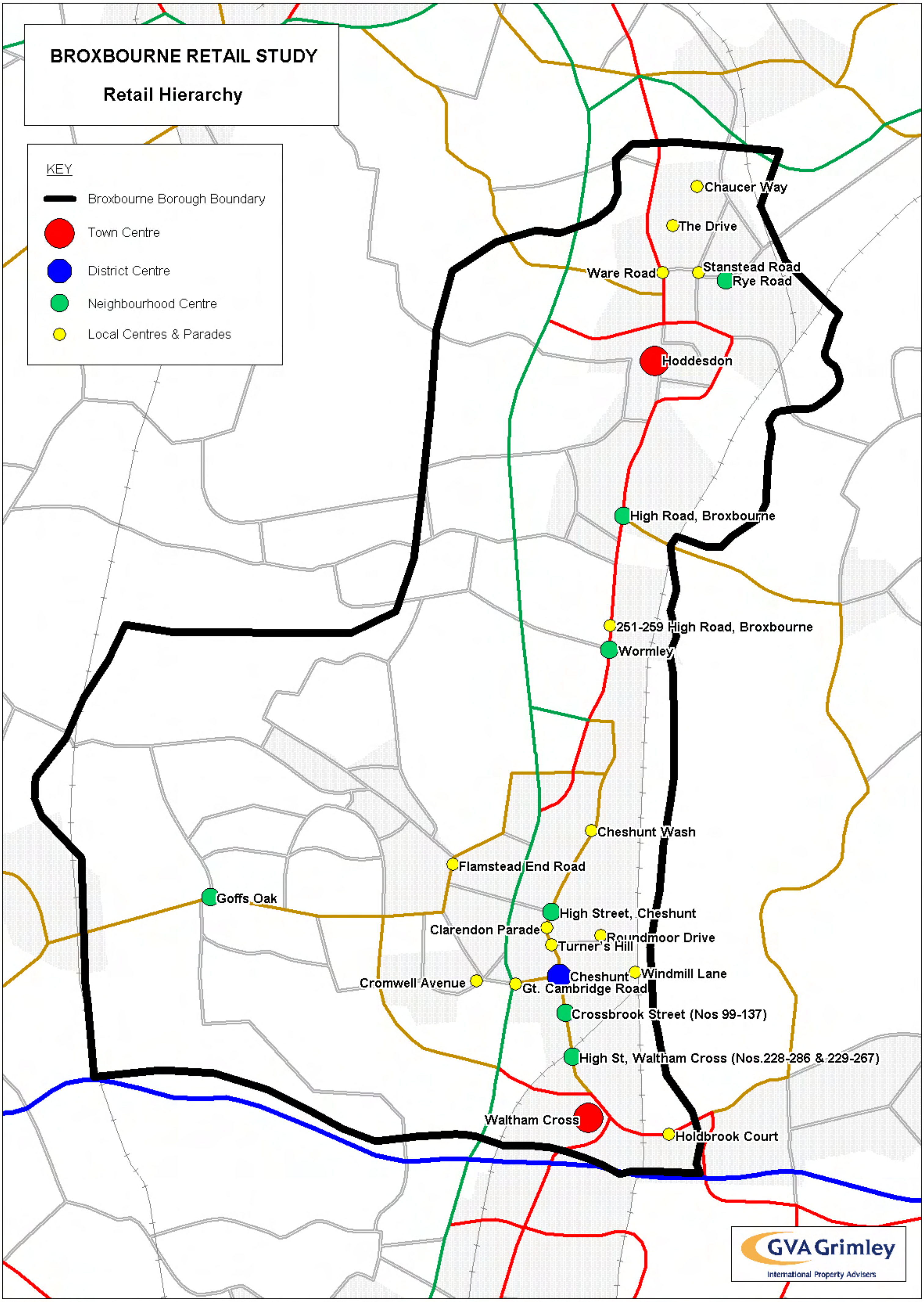
PLAN 2

STUDY AREA AND HOUSEHOLD TELEPHONE SURVEY ZONES


BROXBOURNE RETAIL STUDY
Study Area & Household Telephone Survey Zones
Stevenage
Bishop's Stortford
Welwyn Garden City
Hertford
Ware
Harlow
Hatfield
Hoddesdon
Cheshunt
Waltham Cross
Potters Bar
Enfield
Loughton
Chigwell
Wood Green
Walthamstow
1
2
3
4
5
6
7
8
9
10
11
12
KEY
Broxbourne Borough Boundary
Survey Zone
1 EN11 0/8/9
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 Brookfield Centre
GVA Grimley
International Property Advisers

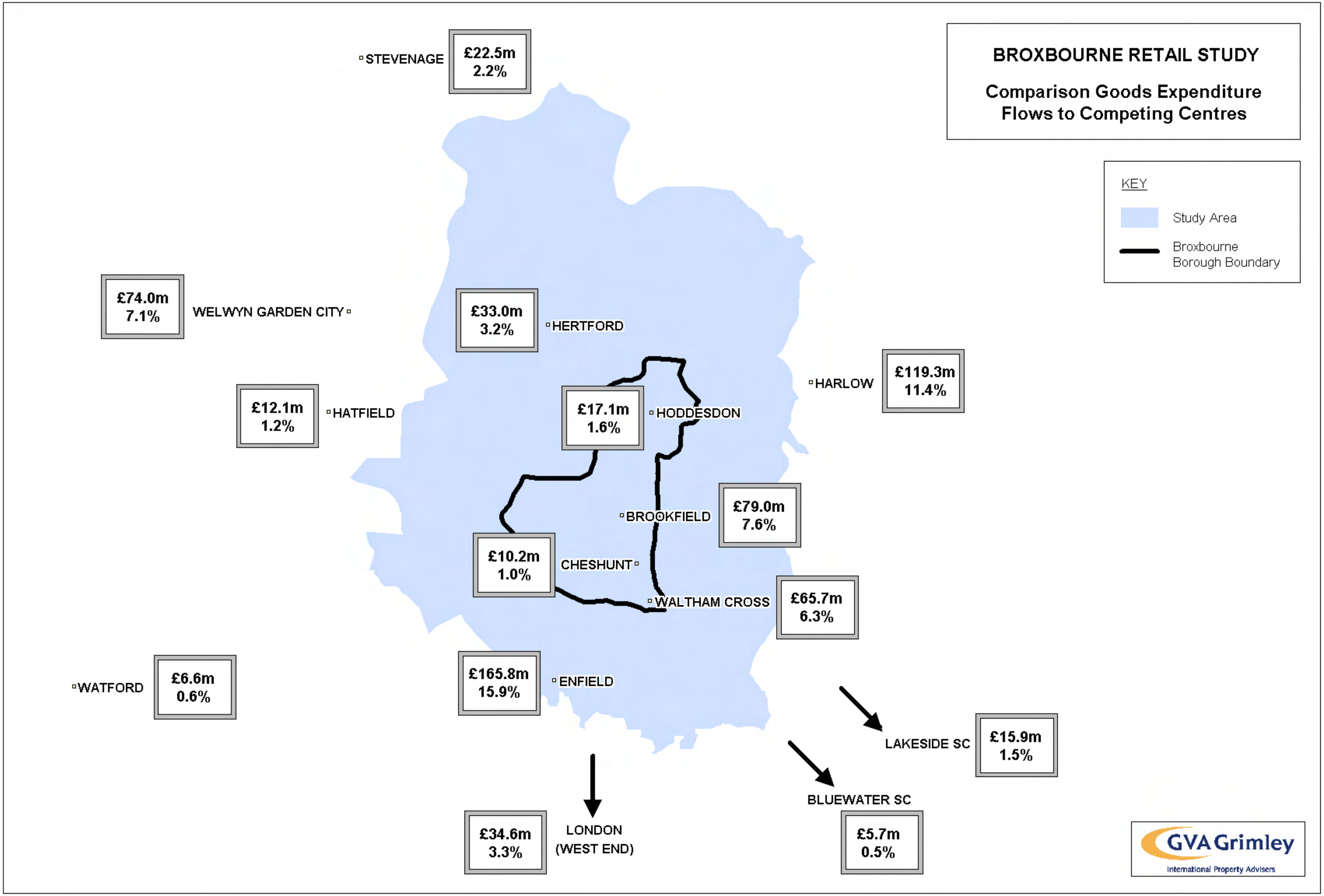
PLAN 3

BROXBOURNE BOROUGH: EXISTING RETAIL HIERARCHY


BROXBOURNE RETAIL STUDY
Retail Hierarchy
KEY
Broxbourne Borough Boundary
Town Centre
District Centre
Neighbourhood Centre
Local Centres & Parades
Chaucer Way
The Drive
Ware Road
Stanstead Road
Rye Road
Hoddesdon
High Road, Broxbourne
251-259 High Road, Broxbourne
Wormley
Cheshunt Wash
Flamstead End Road
Goffs Oak
High Street, Cheshunt
Clarendon Parade
Roundmoor Drive
Turner's Hill
Cheshunt
Windmill Lane
Cromwell Avenue
Gt. Cambridge Road
Crossbrook Street (Nos 99-137)
High St, Waltham Cross (Nos.228-286 & 229-267)
Waltham Cross
Holdbrook Court
GVA Grimley
International Property Advisers

PLAN 4

COMPARISON GOODS EXPENDITURE FLOW TO COMPETING CENTRES

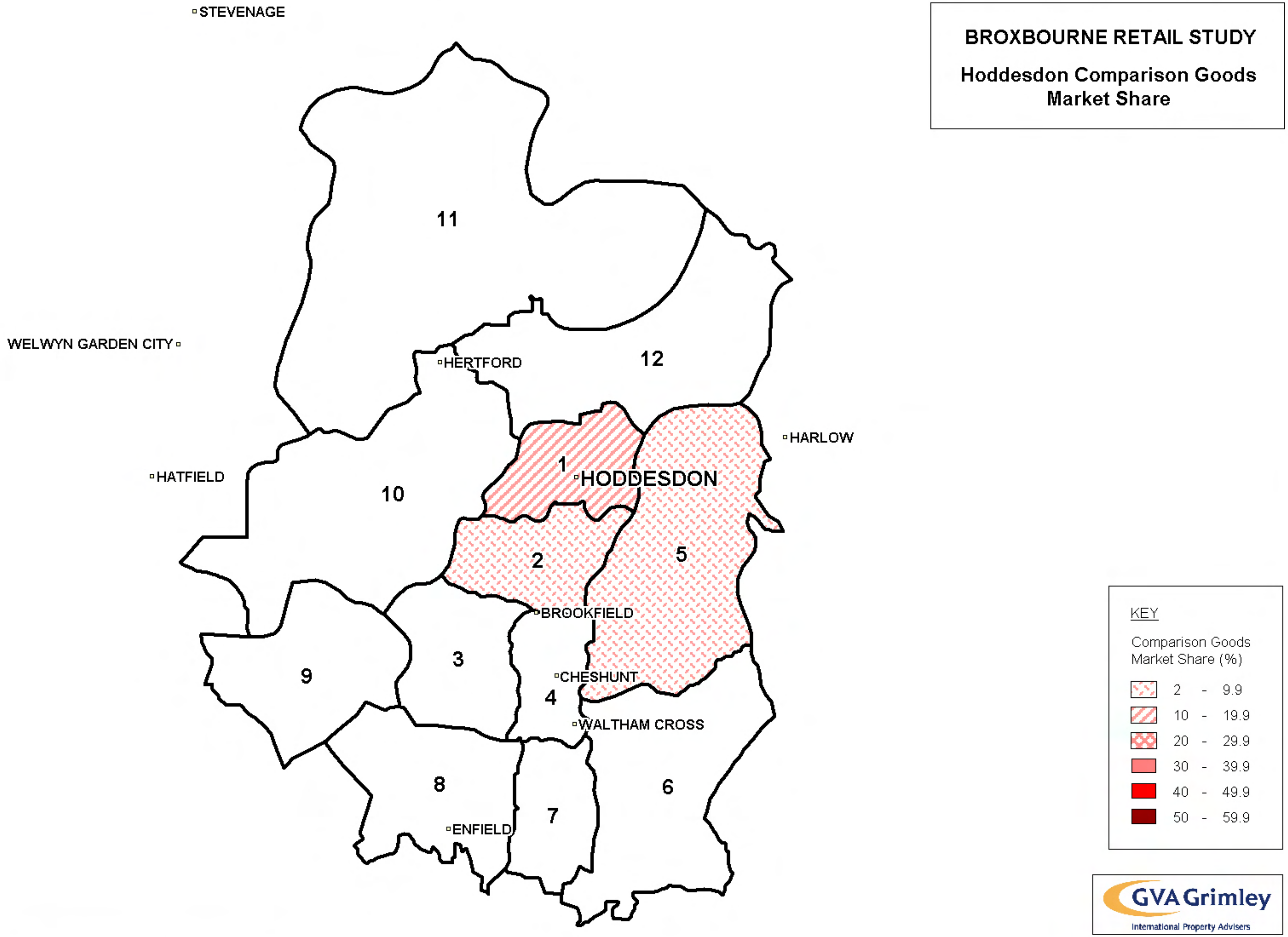

BROXBOURNE RETAIL STUDY
Comparison Goods Expenditure Flows to Competing Centres
KEY
Study Area
Broxbourne Borough Boundary
STEVENAGE
£22.5m
2.2%
£74.0m
7.1%
WELWYN GARDEN CITY
£33.0m
3.2%
HERTFORD
HARLOW
£119.3m
11.4%
£12.1m
1.2%
HATFIELD
£17.1m
1.6%
HODDESDON
BROOKFIELD
£79.0m
7.6%
£10.2m
1.0%
CHESHUNT
WALTHAM CROSS
£65.7m
6.3%
WATFORD
£6.6m
0.6%
£165.8m
15.9%
ENFIELD
LAKESIDE SC
£15.9m
1.5%
BLUEWATER SC
£5.7m
0.5%
£34.6m
3.3%
LONDON
(WEST END)
GVA Grimley
International Property Advisers

PLAN 5

HODDESDON COMPARISON GOODS MARKET SHARE

BROXBOURNE RETAIL STUDY

Hoddesdon Comparison Goods Market Share

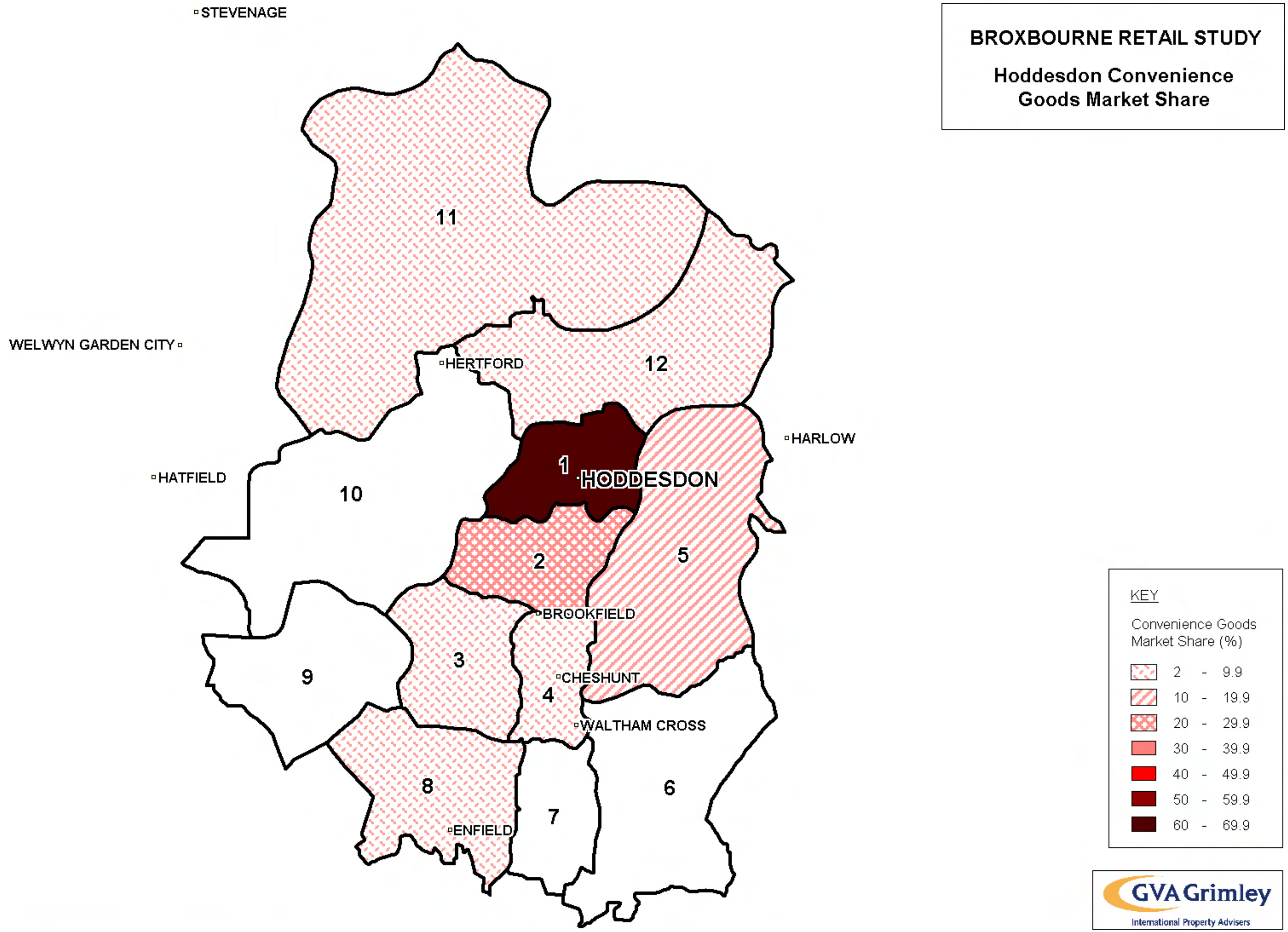


PLAN 6

HODDESDON CONVENIENCE GOODS MARKET SHARE

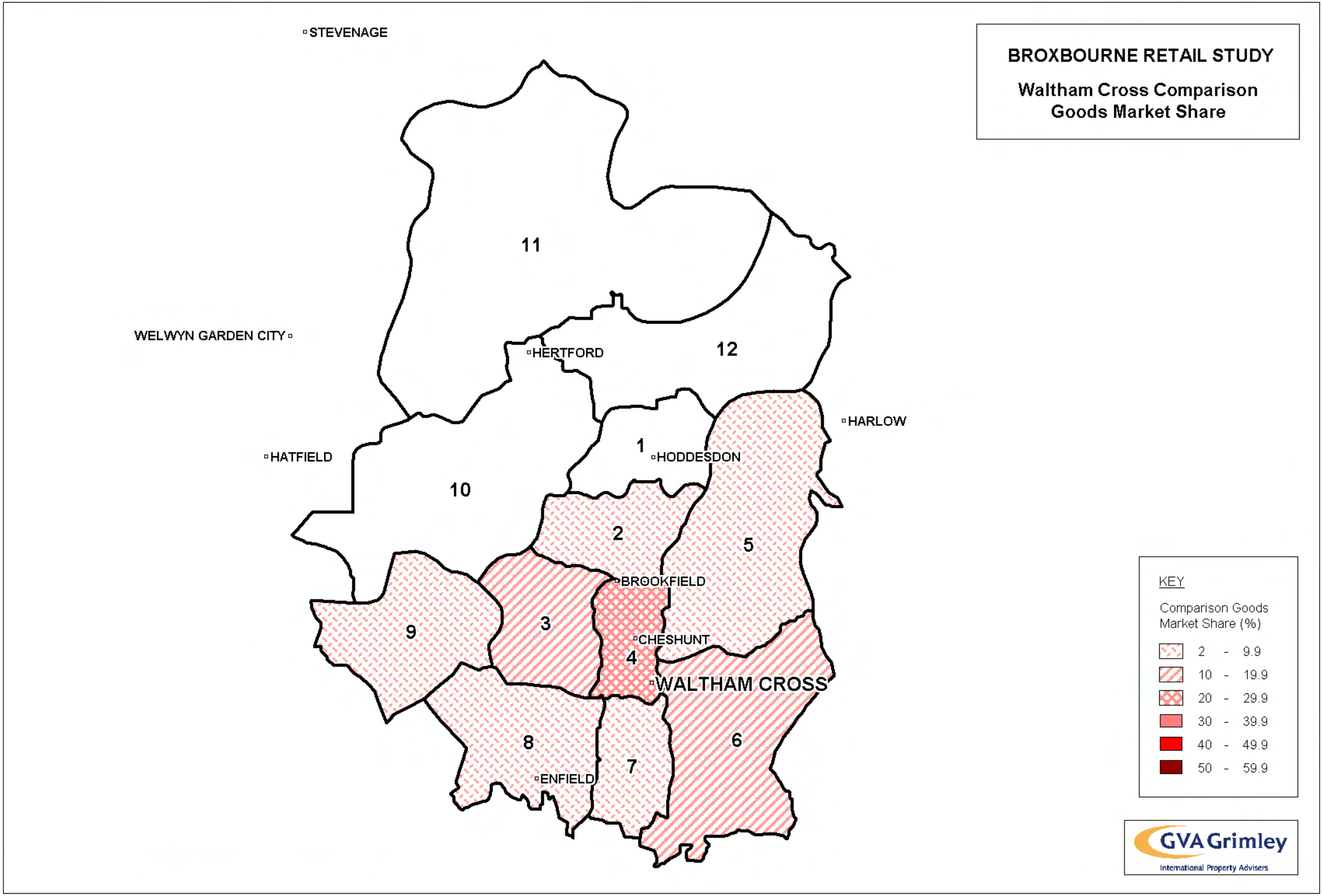
BROXBOURNE RETAIL STUDY

Hoddesdon Convenience Goods Market Share



PLAN 7

WALTHAM CROSS COMPARISON GOODS MARKET SHARE

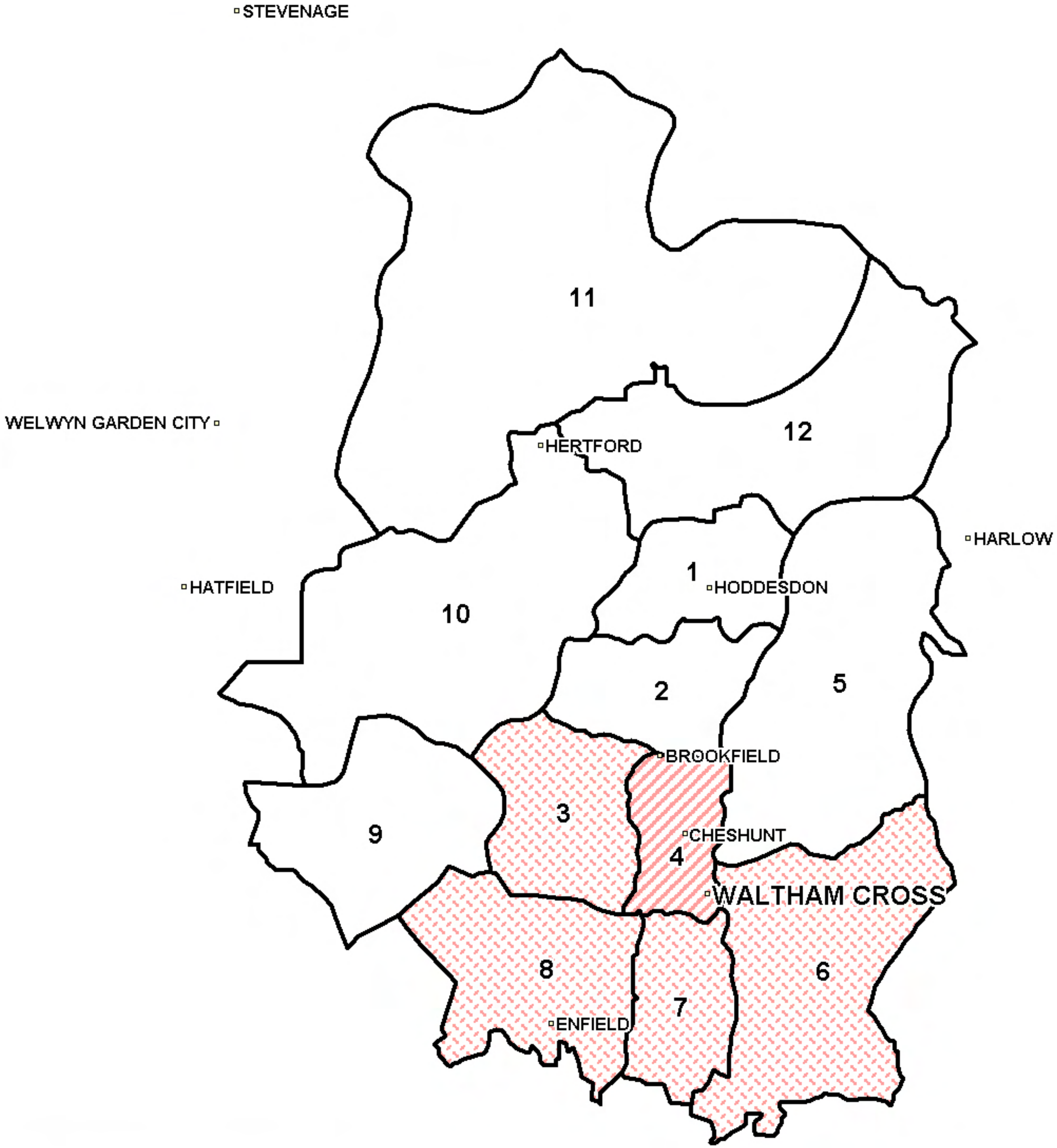

BROXBOURNE RETAIL STUDY
Waltham Cross Comparison Goods Market Share
STEVENAGE
WELWYN GARDEN CITY
HERTFORD
HATFIELD
HARLOW
HODDESDON
BROOKFIELD
CHESHUNT
WALTHAM CROSS
ENFIELD
1
2
3
4
5
6
7
8
9
10
11
12
KEY
Comparison Goods Market Share (%)
2 - 9.9
10 - 19.9
20 - 29.9
30 - 39.9
40 - 49.9
50 - 59.9
GVA Grimley
International Property Advisers

PLAN 8

WALTHAM CROSS CONVENIENCE GOODS MARKET SHARE

BROXBOURNE RETAIL STUDY

Waltham Cross Convenience Goods Market Share



KEY

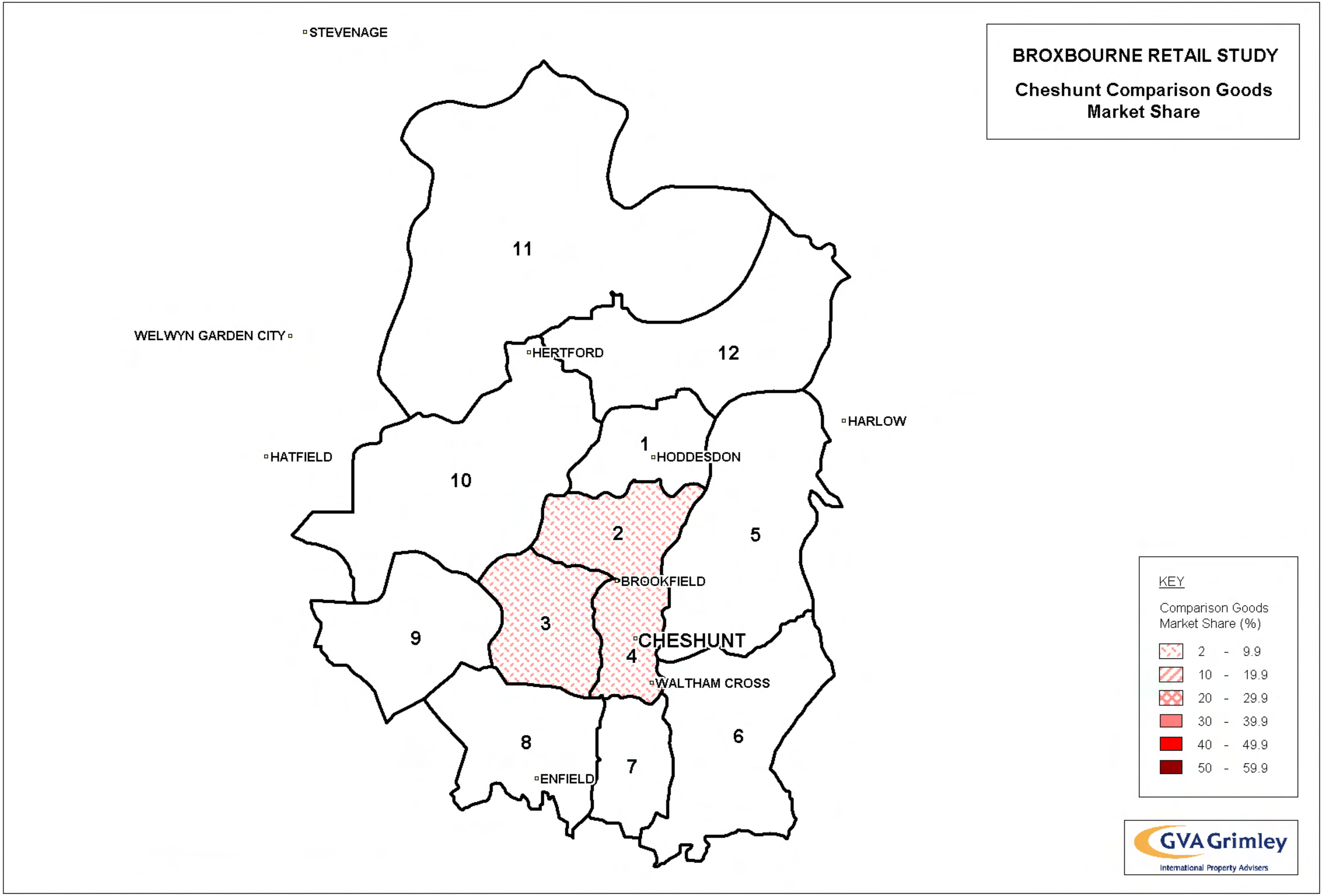
Convenience Goods Market Share (%)

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

GVA Grimley International Property Advisers

PLAN 9

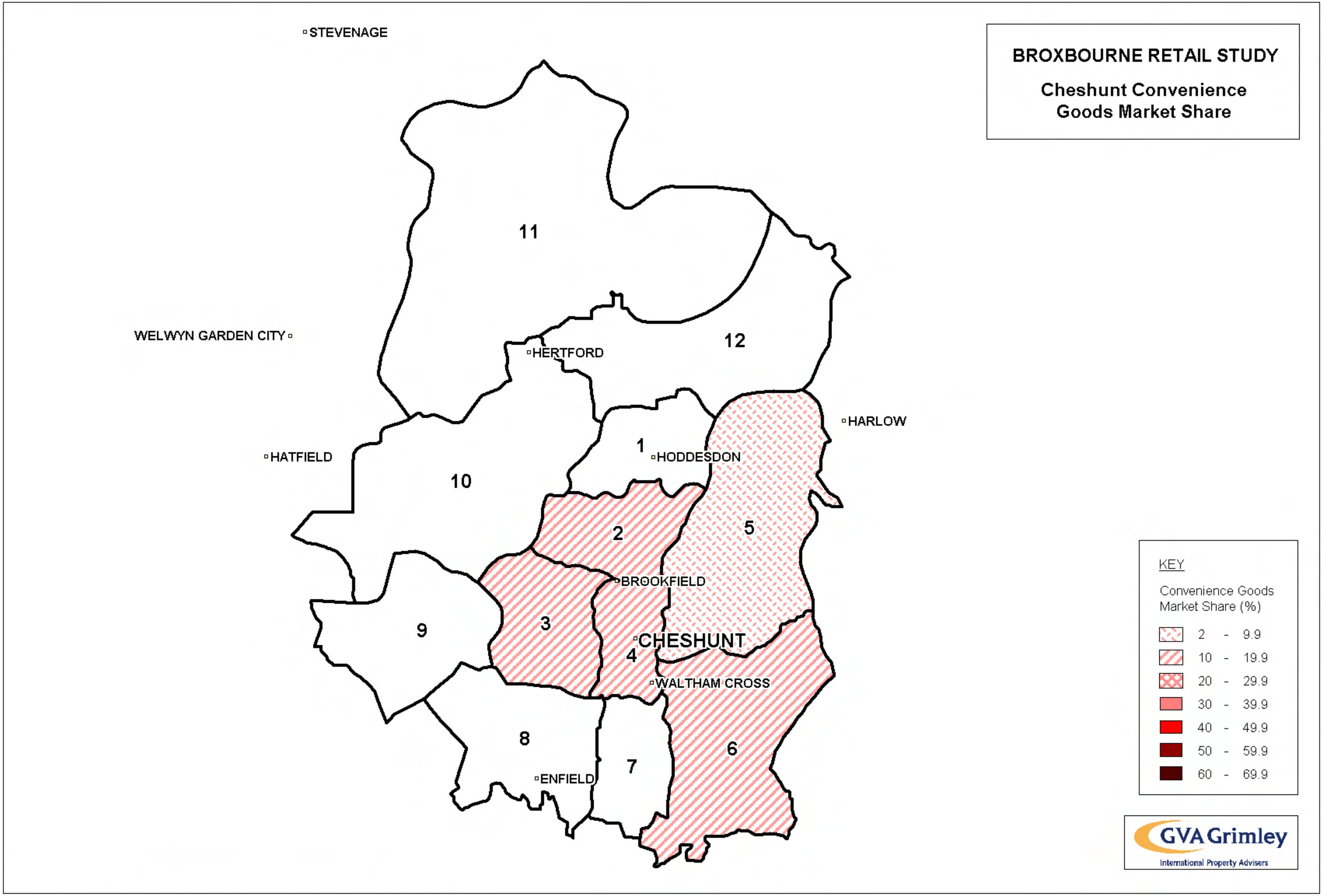
CHESHUNT COMPARISON GOODS MARKET SHARE



BROXBOURNE RETAIL STUDY
Cheshunt Comparison Goods Market Share
STEVENAGE
WELWYN GARDEN CITY
HERTFORD
HATFIELD
HARLOW
HODDESDON
BROOKFIELD
CHESHUNT
WALTHAM CROSS
ENFIELD
1
2
3
4
5
6
7
8
9
10
11
12
KEY
Comparison Goods Market Share (%)
2 - 9.9
10 - 19.9
20 - 29.9
30 - 39.9
40 - 49.9
50 - 59.9
GVA Grimley
International Property Advisers

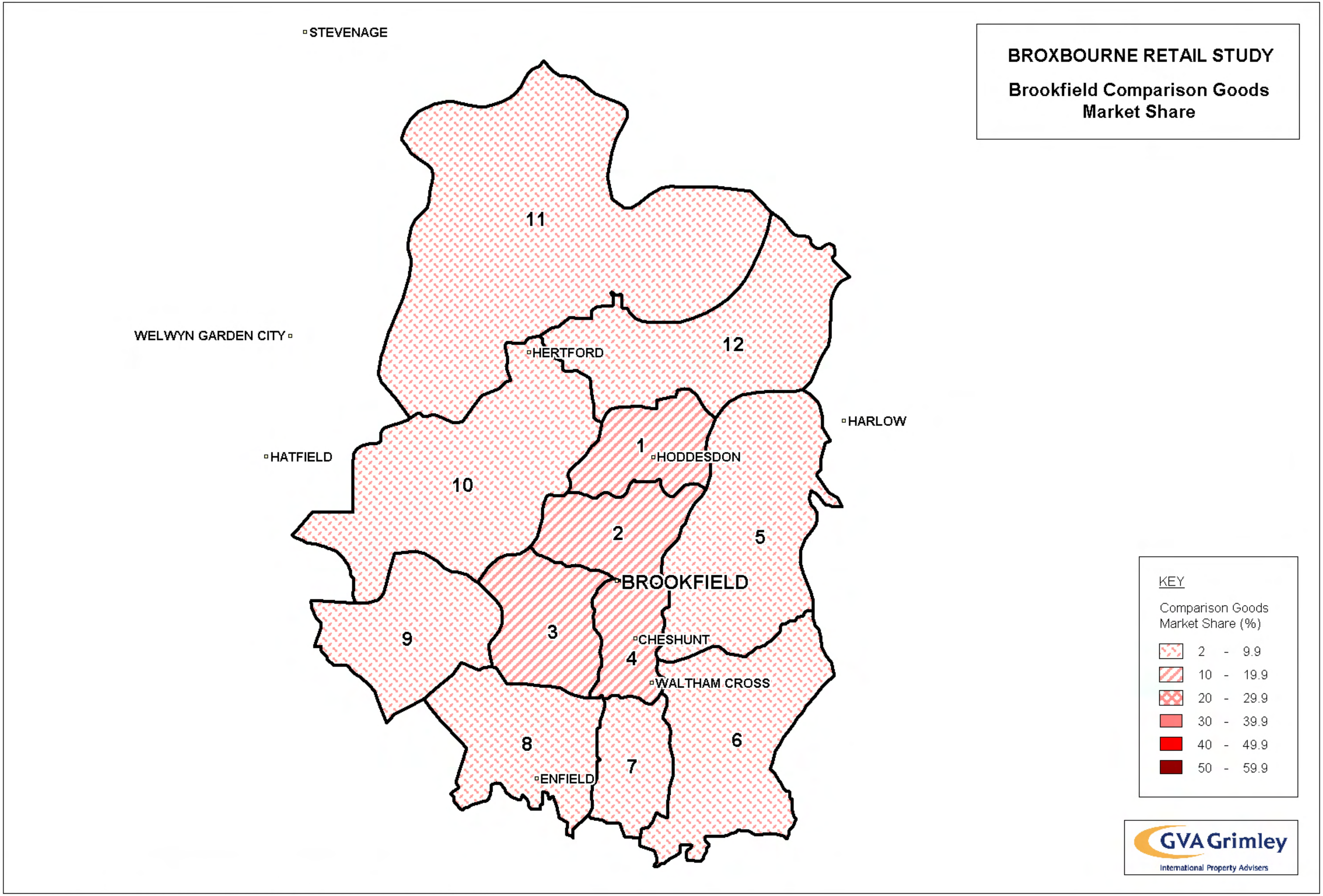
PLAN 10

CHESHUNT CONVENIENCE GOODS MARKET SHARE


BROXBOURNE RETAIL STUDY
Cheshunt Convenience Goods Market Share
STEVENAGE
WELWYN GARDEN CITY
HERTFORD
HATFIELD
HODDESDON
HARLOW
BROOKFIELD
CHESHUNT
WALTHAM CROSS
ENFIELD
1
2
3
4
5
6
7
8
9
10
11
12
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
GVA Grimley
International Property Advisers

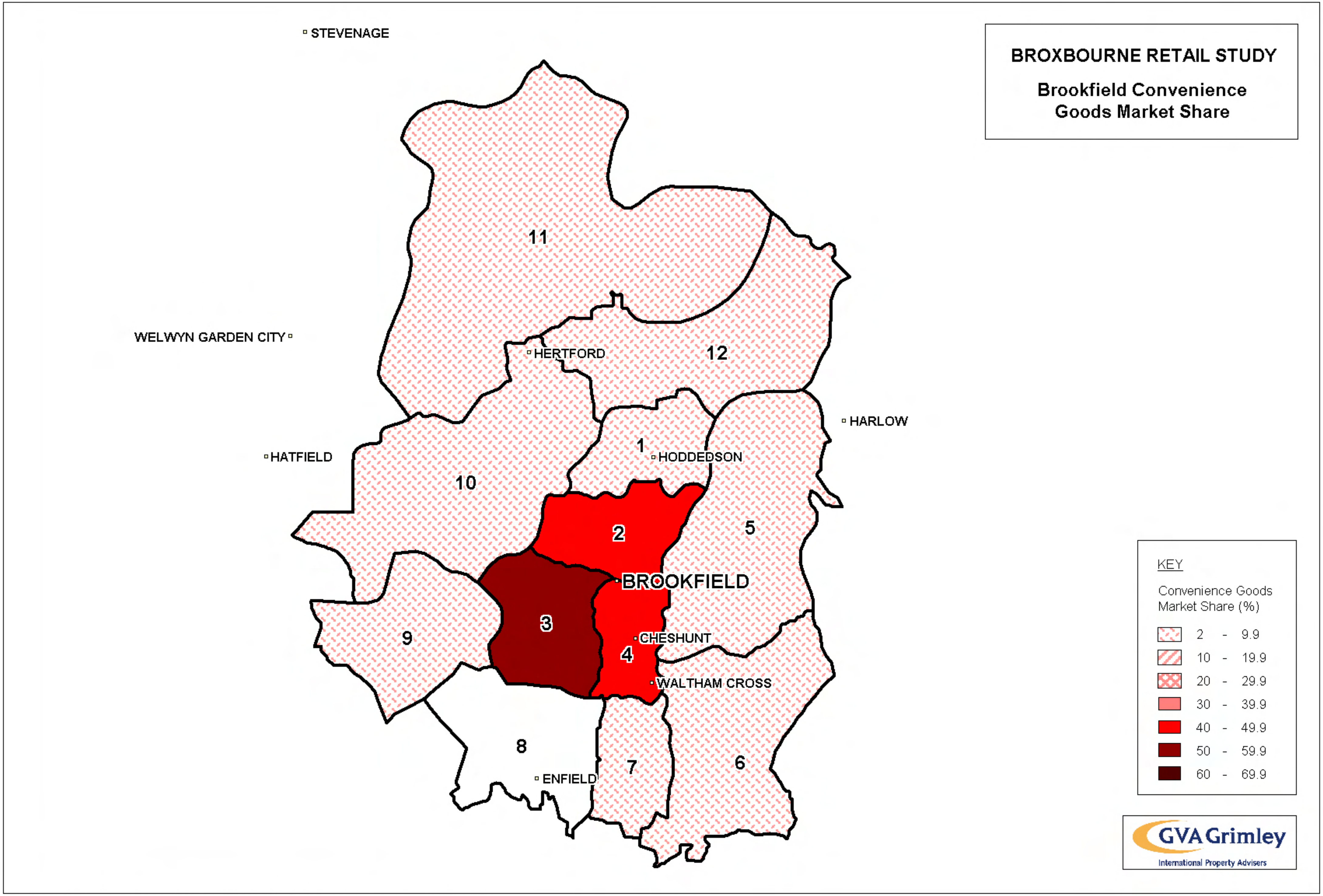
PLAN 11

BROOKFIELD COMPARISON GOODS MARKET SHARE


BROXBOURNE RETAIL STUDY
Brookfield Comparison Goods
Market Share
STEVENAGE
WELWYN GARDEN CITY
HERTFORD
HARLOW
HATFIELD
HODDESDON
BROOKFIELD
CHESHUNT
WALTHAM CROSS
ENFIELD
1
2
3
4
5
6
7
8
9
10
11
12
KEY
Comparison Goods
Market Share (%)
2 - 9.9
10 - 19.9
20 - 29.9
30 - 39.9
40 - 49.9
50 - 59.9
GVA Grimley
International Property Advisers

PLAN 12

BROOKFIELD CONVENIENCE GOODS MARKET SHARE

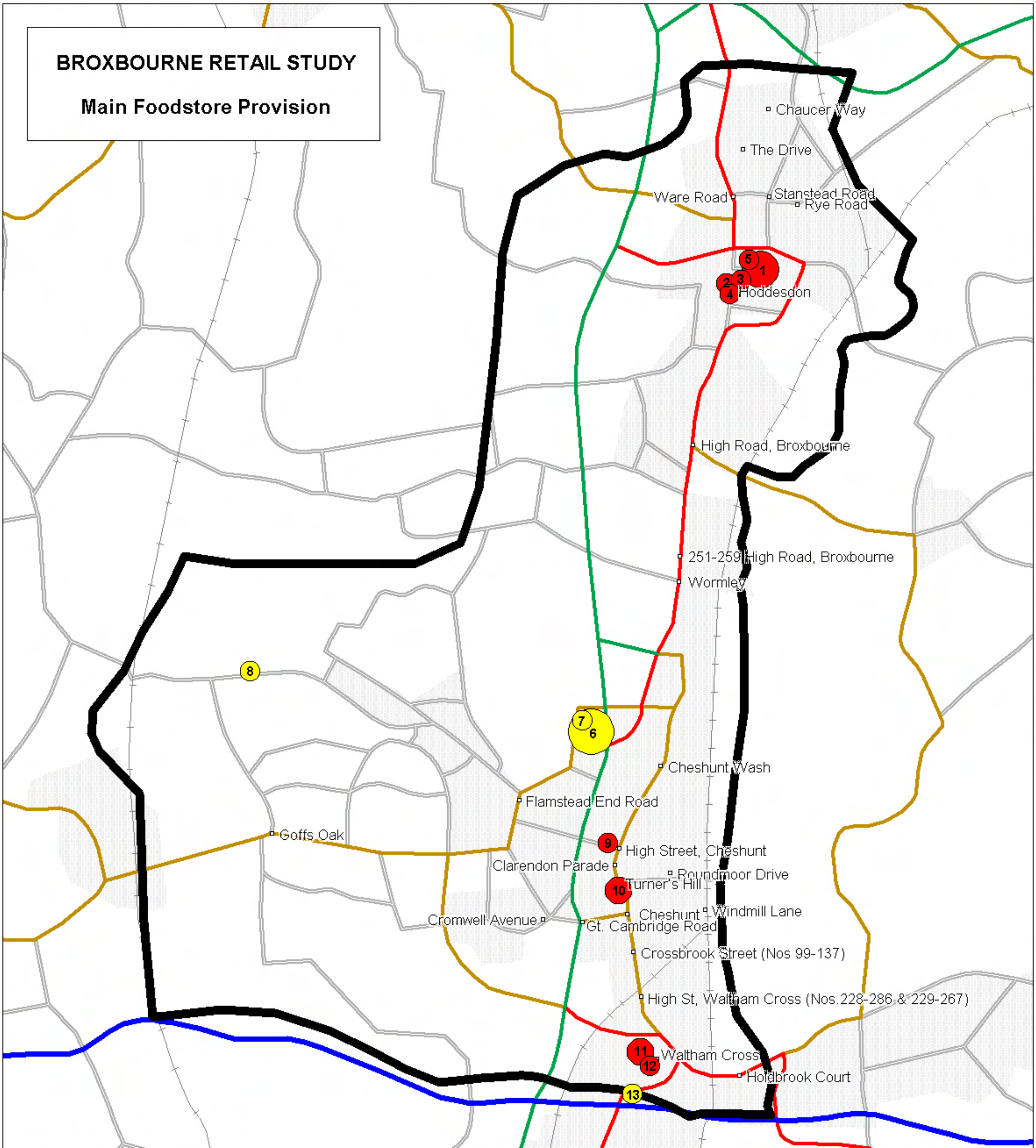

BROXBOURNE RETAIL STUDY
Brookfield Convenience Goods Market Share
STEVENAGE
WELWYN GARDEN CITY
HERTFORD
HATFIELD
HARLOW
HODDEDSON
BROOKFIELD
CHESHUNT
WALTHAM CROSS
ENFIELD
1
2
3
4
5
6
7
8
9
10
11
12
KEY
Convenience Goods Market Share (%)
2 - 9.9
10 - 19.9
20 - 29.9
30 - 39.9
40 - 49.9
50 - 59.9
60 - 69.9
GVA Grimley
International Property Advisers

PLAN 13

EXISTING FOODSTORE PROVISION

BROXBOURNE RETAIL STUDY

Main Foodstore Provision



KEY

Broxbourne Borough Boundary

Foodstore Size (net floorspace):-

- > 4,000 sqm
- 2,000 - 4,000 sqm
- 1,000 - 2,000 sqm
- <1,000 sqm

Location:-

- Town Centre
- Out-of-Centre

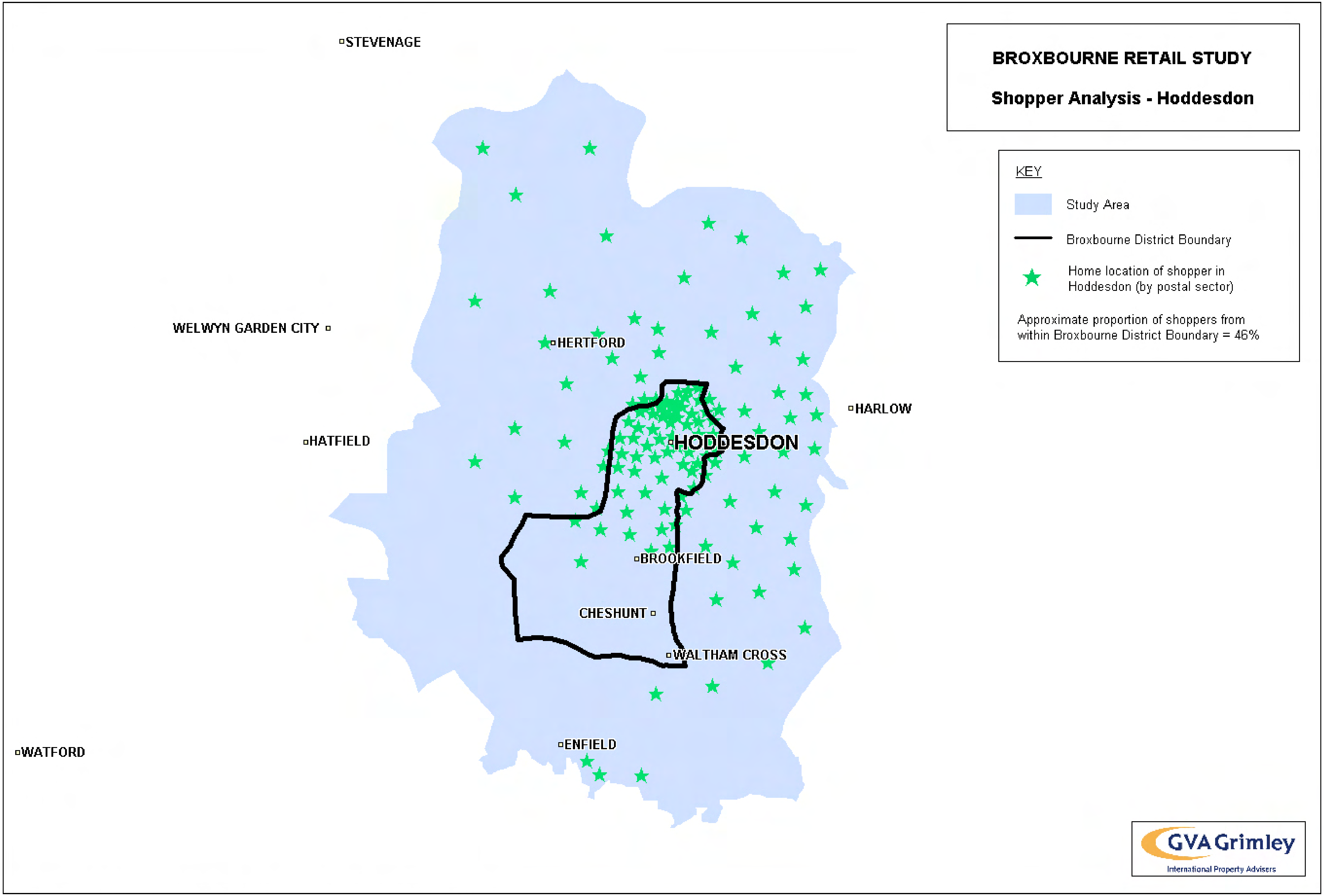
Stores:-

1. Sainbury's, Brewery Rd, Hoddesdon
2. Tesco Express, High St, Hoddesdon
3. Aldi, Fawkon Walk, Hoddesdon
4. Iceland, Brocket Rd, Hoddesdon
5. Netto, The Tower Centre, Hoddesdon
6. Tesco Extra, Brookfield Centre
7. Marks & Spencer, Brookfield Centre
8. Tesco Express, Hammond Ct, Hammondstreet
9. Somerfield, High St, Cheshunt
10. Tesco, Turners Hill, Cheshunt
11. Sainsbury's, Pavillian Centre, Waltham Cross
12. Iceland, High St, Waltham Cross
13. Tesco Express, Bullsmore Lane, Waltham Cross

GVA Grimley
International Property Advisers

PLAN 14

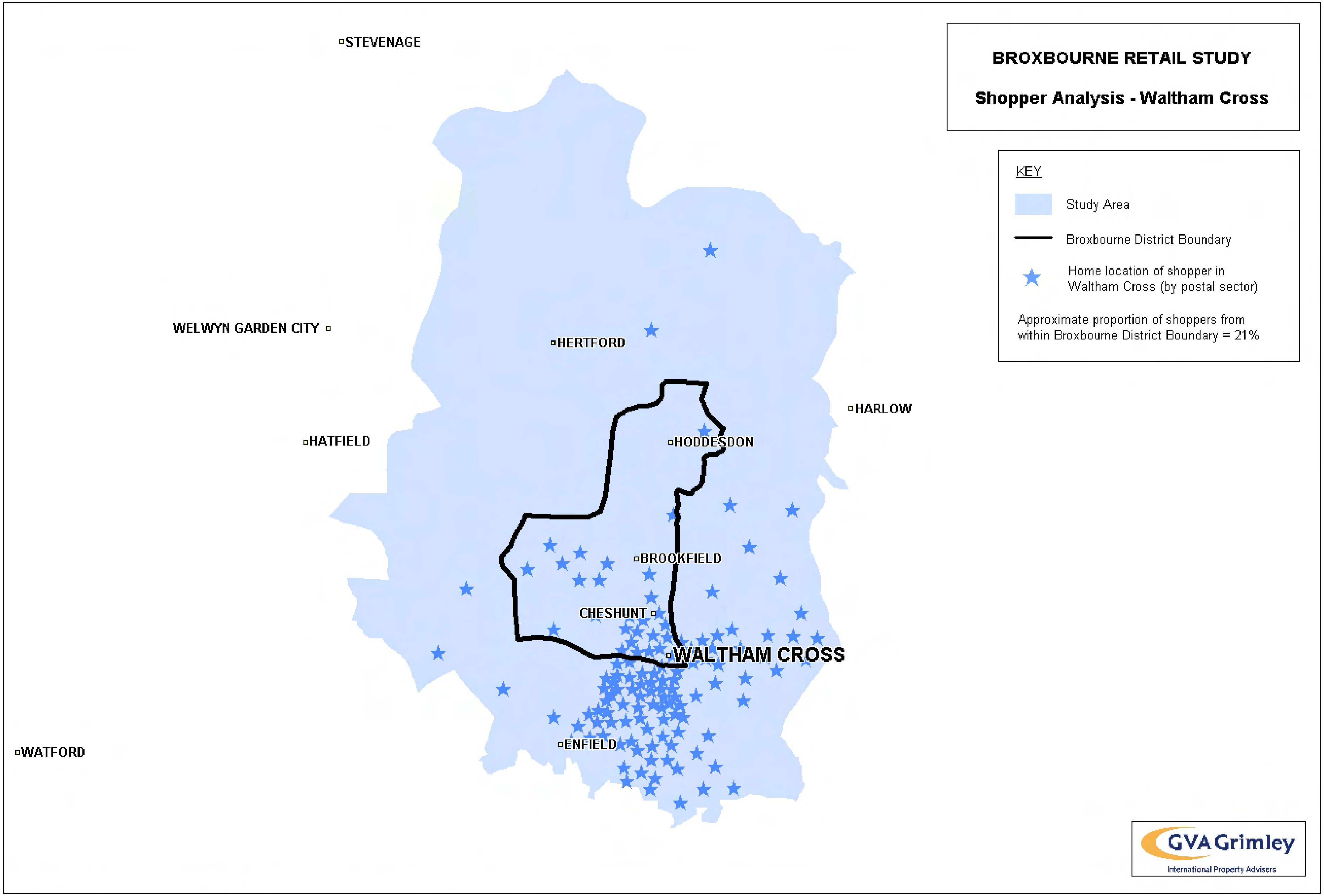
SHOPPER ORIGIN ANALYSIS: HODDESDON



Map reproduced from GBPro 200 GB (2005 edition). © Colins Bartholomew Ltd (2005)

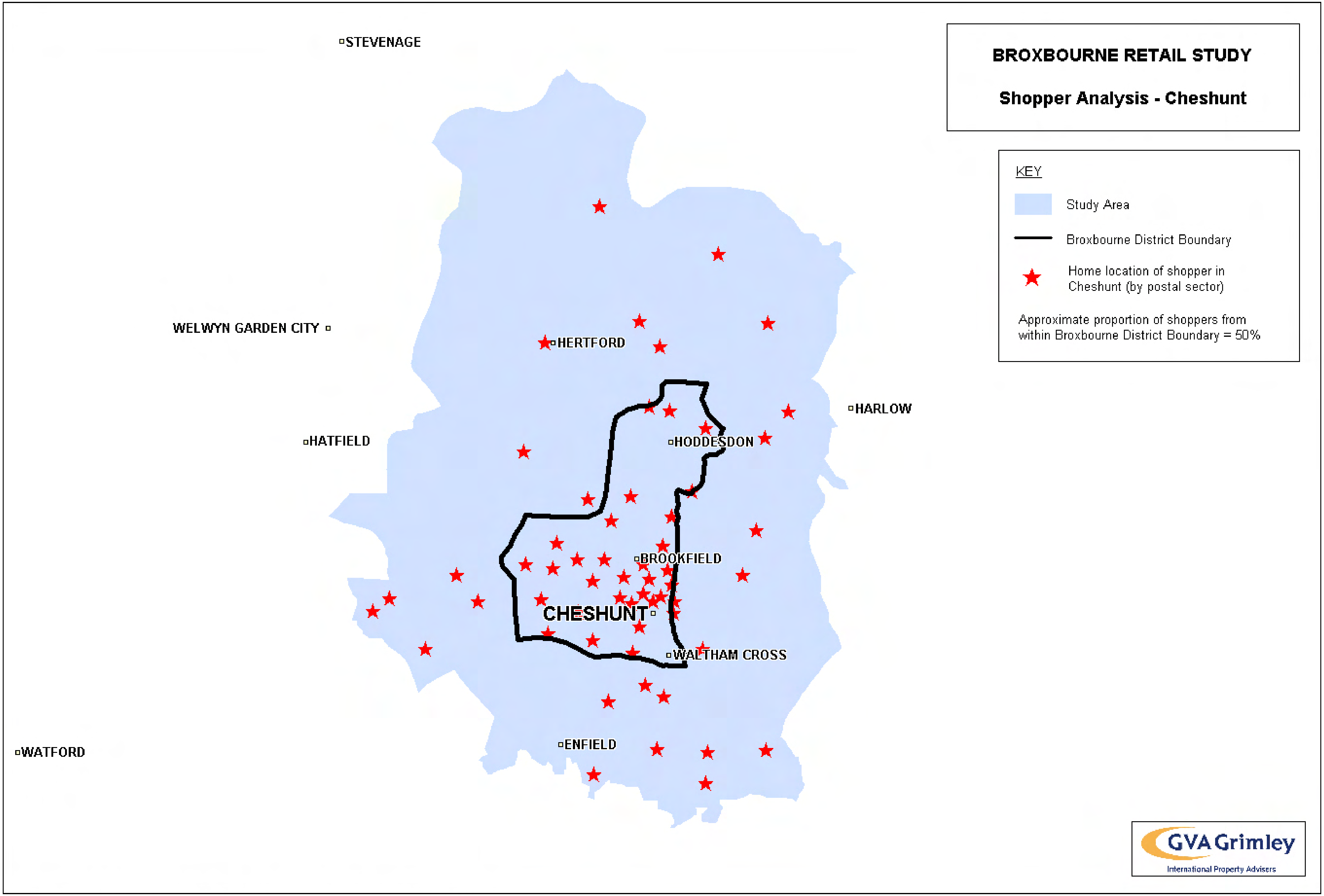
PLAN 15

SHOPPER ORIGIN ANALYSIS: WALTHAM CROSS


BROXBOURNE RETAIL STUDY
Shopper Analysis - Waltham Cross
KEY
Study Area
Broxbourne District Boundary
Home location of shopper in Waltham Cross (by postal sector)
Approximate proportion of shoppers from within Broxbourne District Boundary = 21%
STEVENAGE
WELWYN GARDEN CITY
HERTFORD
HARLOW
HATFIELD
HODDESDON
BROOKFIELD
CHESHUNT
WALTHAM CROSS
ENFIELD
WATFORD
GVA Grimley
International Property Advisers

PLAN 16

SHOPPER ORIGIN ANALYSIS: CHESHUNT



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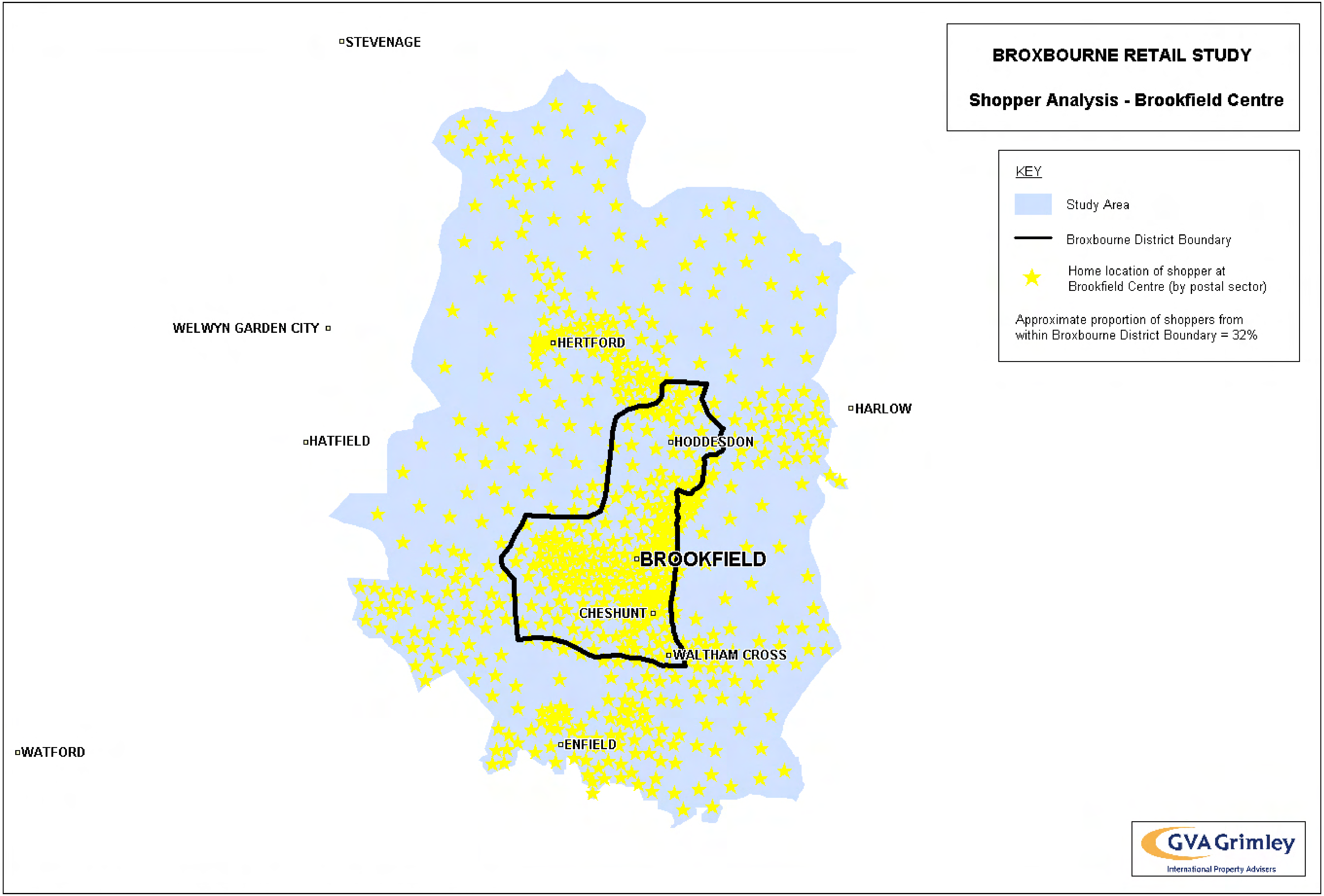
PLAN 17

SHOPPER ORIGIN ANALYSIS: BROOKFIELD CENTRE



Map reproduced from GBPro 200 GB (2005 edition). © Colins Bartholomew Ltd (2005)

APPENDICES

APPENDIX 1

COMPETING CENTRES

APPENDIX 1A

MARKET SHARE AND TRADE RETENTION

BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY 2008

TABLE 1
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 PARK, ENFIELD	COLISEUM RETAIL PARK, ENFIELD	DE MANDEVILLE RETAIL PARK, ENFIELD	MADFORD RETAIL PARK, HERTFORD	ROARING MEG RETAIL PARK, STEVENAGE	SUB-TOTAL	OTHER	TOTAL
1	0.2	1.2	35.0	0.5	3.0	1.1	2.2	0.2	0.0	6.7	0.8	0.4	0.0	0.1	0.0	**51.4**	48.6	100
2	1.0	2.0	17.3	0.6	0.9	1.1	5.6	0.2	0.3	8.3	3.1	0.2	0.3	0.3	0.0	**41.3**	58.7	100
3	0.8	11.1	6.4	1.0	0.4	4.0	2.4	0.0	0.2	10.0	6.9	1.1	0.0	0.0	0.0	**44.3**	55.7	100
4	0.0	6.2	6.1	0.3	0.4	2.0	0.4	0.3	0.0	1.3	6.8	0.8	0.0	0.0	0.0	**24.6**	75.4	100
5	0.9	1.5	50.1	0.0	0.5	4.0	2.5	0.5	0.0	4.8	1.1	0.8	0.0	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	1.1	5.3	1.5	0.3	0.3	1.0	**39.1**	60.9	100
7	0.2	38.0	1.9	0.7	0.7	0.7	3.2	0.0	0.3	0.0	12.5	3.3	0.0	0.0	0.0	**61.6**	38.4	100
8	0.9	41.2	2.0	0.4	0.1	0.3	3.5	0.0	2.0	2.6	18.1	3.7	0.0	0.0	0.0	**74.8**	25.2	100
9	0.0	7.6	0.3	3.8	0.1	0.0	4.9	2.8	1.9	21.8	2.8	0.6	0.0	0.0	0.7	**47.4**	52.6	100
10	0.3	1.8	2.3	3.2	20.4	1.2	4.0	7.1	0.2	25.7	0.6	0.2	2.4	2.4	0.5	**72.2**	27.8	100
11	0.3	0.8	15.3	3.8	13.0	0.0	2.6	14.5	0.0	14.7	0.0	0.2	0.6	0.6	2.2	**68.6**	31.4	100
12	0.5	1.3	26.4	2.0	10.7	0.4	3.3	2.9	0.9	18.2	0.3	0.0	0.6	0.6	0.0	**68.2**	31.8	100

Source: Household telephone survey / Experian Business Strategies

TABLE 2
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	COLISEUM RETAIL PARK, ENFIELD	DE MANDEVILLE RETAIL PARK, ENFIELD	MADFORD RETAIL PARK, HERTFORD	ROARING MEG RETAIL PARK, STEVENAGE	SUB-TOTAL	OTHER	TOTAL SPEND
1	156	728	21,968	310	1,880	686	1,387	156	0	4,199	502	228	0	45	0	**32,246**	30,490	62,736
2	484	1,003	8,666	317	439	567	2,810	86	137	4,158	1,534	114	164	164	0	**20,643**	29,379	50,022
3	536	7,293	4,247	664	280	2,633	1,559	0	145	6,591	4,583	717	0	0	0	**29,247**	36,744	65,991
4	0	6,190	6,065	273	393	2,026	393	273	0	1,288	6,777	806	0	0	0	**24,482**	75,174	99,656
5	408	640	21,699	0	226	1,750	1,066	199	0	2,093	486	327	0	0	0	**28,894**	14,427	43,321
6	1,238	5,150	13,613	0	0	5,786	6,562	0	0	1,167	5,861	1,695	371	371	1,078	**42,892**	66,943	109,835
7	250	51,340	2,499	978	1,005	978	4,301	0	370	0	16,945	4,472	0	0	0	**83,138**	51,929	135,068
8	1,871	87,075	4,296	942	151	714	7,413	0	4,190	5,415	38,288	7,834	0	0	0	**158,189**	53,263	211,452
9	0	4,055	159	2,022	42	0	2,623	1,513	1,035	11,638	1,503	333	0	0	354	**25,275**	28,041	53,316
10	107	582	773	1,055	6,758	405	1,319	2,358	70	8,493	184	60	782	782	149	**23,878**	9,201	33,079
11	299	827	16,689	4,180	14,234	0	2,827	15,829	0	16,129	0	252	704	704	2,362	**75,036**	34,332	109,368
12	368	935	18,637	1,397	7,549	314	2,335	2,055	619	12,822	239	0	408	408	0	**48,087**	22,438	70,525
TOTAL	**5,717**	**165,818**	**119,312**	**12,136**	**32,957**	**15,860**	**34,595**	**22,468**	**6,565**	**73,992**	**76,900**	**16,839**	**2,430**	**2,475**	**3,943**	**592,008**	**452,361**	**1,044,369**

Source: Household telephone survey / Experian Business Strategies

APPENDIX 1B

RETAILER REPRESENTATION

Competing Centres: Retailer Representation

Centre	Shopping Centres	Key Anchors	Department Stores
Bluewater	• Bluewater Shopping Centre (1999), c.144,018 sqm gross.	Next, Boots, Gap, WhSmith, Topshop	John Lewis, House of Fraser, Marks & Spencer
Enfield	• Palace Gardens (1982), c.20,902 sqm gross. • Palace Exchange (2006), c. 14,864 sqm gross.	Next, Woolworths, Topshop, Boots, Waitrose	Pearsons, Marks & Spencer,
Harlow	• Harvey Centre (1982), c.33,444 sqm gross.	Primark, Wilkinson, Woolworths, Asda, Tesco	Marks & Spencer, Bhs
Hatfield	• The Galleria Outlet Centre (1993), c. 29,915 sqm gross (TK Maxx, Reebok, Oasis, the Body Shop).	Asda, Boots, Superdrug, New Look	None
Hertford	• Bircherley Green Shopping Centre (1983).	Waitrose, Boots, New Look, Woolworths	None
Lakeside	• Lakeside Shopping Centre (1990), c. 112,595 sqm gross.	Bhs, Woolworths, Primark, Gap, H&M, Lillywhites	House of Fraser, Debenhams, Marks & Spencer,
London (West End)	• Various.	Topshop, Primark, Gap, H&M, Next, HMV	Selfridges, John Lewis, House of Fraser, Debenhams, Marks & Spencer
Stevenage	• Queensway (1959), c.12,077 sqm gross. • Westgate Centre (1988), c.6,967 • Forum Centre Phase 1 (1990), c.9,290 sqm gross • Forum Centre Phase 2 (1997), c. sqm gross.	Primark, Woolworths, Tesco Extra, TK Maxx, New Look	Marks & Spencer, Bhs
Watford	• The Harlequin Centre (1990), c.67,352 sqm gross. • Charter Place (1976), c.13,285 sqm gross.	Bhs, Wilkinson, Argos Extra, Woolworths, Sainsbury's	John Lewis, Marks & Spencer
Welwyn Garden City	• Howard Centre (1990), c. 22,296 sqm gross.	Next, Boots, Argos, Sainsbury's	John Lewis, Debenhams, Marks & Spencer

Source: Promis/EGI/Goad/GVA Grimley

APPENDIX 1C

KEY INDICATORS

Competing Centres: Key Indicators

2.1 Javelin Rank		
Centre	**Rank (2007)**	**Change in Rank position 2006**
London (West End)*	9	↑
Bluewater	28	↓
Watford	37	↑
Lakeside	71	↓
Stevenage	113	↑
Harlow	149	↑
Enfield	183	↑
Welwyn Garden City	202	↓
Waltham Cross	**479**	↓
Hertford	502	↓
Hoddesdon	**663**	↑
Brookfield	**740**	↓
Hatfield	990	↓
Cheshunt	**1304**	↑

Source: Venue Score/Javelin 2007
**Oxford Street*

2.2 Retail Floorspace	
Centre	***sq.m gross***
London (West End)	1,364,904
Watford	144,678
Bluewater	144,018
Lakeside	130,798
Harlow	92,336
Stevenage	81,674
Enfield	56,866
Hatfield	55,788
Welwyn Garden City	50,600
Hertford	46,619
Waltham Cross	**39,614**
Hoddesdon	**35,600**
Brookfield	**28,159**
Cheshunt	**19,640**

Source: Experian Goad

Competing Centres: Key Indicators

2.3 Comparison Goods Trade Draw %	
Centre	%
Enfield	15.9
Harlow	11.4
Brookfield	7.6
Welwyn Garden City	7.1
Waltham Cross	6.3
London (West End)	3.3
Hertford	3.2
Cheshunt	1.0
Stevenage	2.2
Hoddesdon	1.6
Lakeside	1.5
Hatfield	1.2
Watford	0.6
Bluewater	0.5
Source: GVA Grimley Modelling	

2.4 Comparison Goods Trade Draw £m	
Centre	**£m**
Enfield	165,818
Harlow	119,312
Brookfield	78,971
Welwyn Garden City	73,992
Waltham Cross	65,744
London (West End)	34,595
Hertford	32,957
Cheshunt	10,224
Stevenage	22,468
Hoddesdon	17,148
Lakeside	15,860
Hatfield	12,136
Watford	6,565
Bluewater	5,717
Source: GVA Grimley Modelling	

Competing Centres: Key Indicators

2.5 Comparison of Prime Retail Yields (% Change)			
Centre	**Jan 05**	**Jan 08**	**Change in rank position**
London (West End)	5.25	4.25	
Lakeside	4.75	4.75	
Bluewater	5	5	
Watford	5.5	5.25	
Enfield	7	5.75	
Harlow	6.75	5.75	
Stevenage	6.5	6.5	
Welwyn Garden City	7	7	
Hertford	8.5	8.5	
Hatfield	9	9	
Hoddesdon			
Waltham Cross			
Cheshunt			
Brookfield			
Source: Valuation Office Agency – Property Market Report			

2.6 Comparison of Prime Retail Rents (£ per sq.m)			
Centre	**2006**	**2007**	**Change in rank position**
London (West End)*	5651	5705	↑
Bluewater	4413	4467	↑
Lakeside	3875	3875	<>
Watford	3283	3337	↑
Enfield	1615	1615	<>
Stevenage	1184	1238	↑
Welwyn Garden City	1130	1184	↑
Harlow	1076	1076	<>
Hertford	592	646	↑
Hatfield	-	-	
Hoddesdon			
Waltham Cross			
Cheshunt			
Brookfield			
Source: Colliers In Town Retail Rents 2007 **Oxford Street: West*			

APPENDIX 1D

PIPELINE SCHEMES

Competing Centres

Key Town Centre Pipeline Schemes

Bluewater Shopping Centre

- There are currently no retail developments in the pipeline.

Enfield

- There are currently no retail developments in the pipeline.

Harlow

- Full planning permission has been granted for an 11,612 sqm gross (125,000 sq ft) extension to the Harvey Centre to provide new Debenhams department store and unit shops.

Hatfield

- Regeneration of Hatfield Town Centre to involve an additional 14,864 sqm net retail floorspace is being joint-led by Welwyn-Hatfield BC, English Partnerships and St Mowden Developers. Work on the scheme is anticipated to commence in April 2008.

Hertford

- A planning application proposing the redevelopment of McMullens Brewery on Hartham Lane to create a Sainsbury's foodstore with offices and commercial space was withdrawn in April 2008. The Council are currently unaware of any further proposals for the site.

Lakeside Shopping Centre

- Capitol Shopping Centres have a long-term plan to extend the shopping centre by c.23,225 sqm gross (250,000 sq ft) but the realisation of this is uncertain.

London (West End)

- Full planning permission has been granted for a major scheme on Oxford Street West. The scheme, known as Park House, will create an additional 4,000 sqm net retail floorspace and result in a block of large, well configured units. Demolition is due to begin in early 2008 with completion planned for late 2010, early 2011.

- There are also a number of potential redevelopment sites towards the eastern end of Oxford Street although uncertainty surrounding the Crossrail project is holding up any implementation.

- Crown Estate have proposed major redevelopment of the southern part of Regent Street (including the Regent Palace Hotel) to create an additional 4,300 sqm net retail floorspace and a hotel.

Stevenage • An application has been submitted for the town centre development area (NW Quadrant) which will create 18,580 sqm (200,000 sq ft) additional retail floorspace as part of the 28,520 sqm (307,000 sq ft) scheme.
Watford • There are plans for the redevelopment of the c.18,580 sqm gross (200,000 sq ft) Charter Place for retail, leisure and community uses. • There are also plans for a development at Watford Junction Station to include residential, office, community facilities, hotel and some retail floorspace. An application is yet to be submitted.
Welwyn Garden City • There are plans for a comparison-led retail extension to the north of the town centre incorporating an extension to the Howard Centre. The scheme is likely to create 9,290 sqm gross (100,000 sq ft) additional retail floorspace anchored by Marks & Spencer. • Full planning permission has been granted for a 1,950 sqm gross (21,000 sq ft) extension to the Sainsbury's store at Church Road. • Consent has also been granted for a 929 sqm gross (10,000 sq ft) extension to Waitrose on Bridge Road. • A development brief is currently being prepared in relation to 11,148 sqm gross (110,000 sq ft) scheme at the Cereal Partners / Roche sites where there is potential for a new superstore.

Source: Promis, EGi and Local Authority websites (May 2008)

APPENDIX 2

HODDESDON TOWN CENTRE HEALTHCHECK

APPENDIX 2A

KEY INDICATORS

Hoddesdon Town Centre: Key Indicators

Retail Composition by Number of Units

Retail Category	No. of Units	% of Total	UK Average (%)	Variance
Comparison	47	26.86	35.47	-8.62
Convenience	11	6.29	8.71	-2.42
Service	87	49.71	45.72	3.99
Vacant	28	16	9.92	6.08
Miscellaneous	2	1.14	0.17	0.97
TOTAL	175	100	100	-

Source: Experian Category Report (November, 2006)

Ranking of Retailer Requirements

No. of Requirements	Ranking (1st Highest)	Date
9	643	Oct O7
10	616	Oct-06
8	670	Oct-05
8	650	Oct-04
13	440	Oct-03
13	405	Oct-02

Source: Focus Property Intelligence (May 2008)

Hoddesdon Town Centre: Key Indicators

Retailer Requirements by Use Category and Floorspace

Use Category	No. of Requirements	Min. Floorspace (sqm gross)	Max. Floorspace (sqm gross)
Comparison	5	1,491	3,391
Convenience	1	74	111
Service	2	177	975
TOTAL	**8**	**1,742**	**4,477**
Source: Focus Property Intelligence (May 2008)			

Vacancies

Vacant Units	% of Total Units	UK Average (%)
28	16	9.92
Source: Experian Category Report (November, 2006)		

Vacant Floorspace (sqm)	% of Total Floorspace (Sqm)	UK Average (%)
3,586	10.07	8.08
Source: Experian Category Report (November, 2006)		

Hoddesdon Town Centre
Convenience Goods Market Share

Zone	Convenience Goods Market Share (%)
1	68
2	28
3	3
4	4
5	13
8	4
10	1
11	3
12	9

Source: Household Telephone Survey (April 2008)

Competing Foodstore
Convenience Goods Market Share

Zone	Tesco Extra, Brookfield Centre	Tesco Metro, Turners Hill, Cheshunt
1	7	1
2	45	4
3	51	11
4	44	14
5	7	0
8	1	0
10	1	0
11	3	0
12	4	1

Source: Household Telephone Survey (April 2008)

Hoddesdon Town Centre
Comparison Goods Market Share

Zone	Comparison Goods Market Share (%)
1	13
2	5.5
3	1.2
5	2.7
6	0.3
7	0.2
8	0.3
9	0.3
10	0.2
11	1.5
12	1.7

Source: Household Telephone Survey (April 2008)

Hoddesdon Town Centre
Comparison Goods Market Share by Goods Category

	Zone 1	Zone 2	Zone 3	Zone 5	Zone 11	Zone 12
Clothing / Footwear	2.1	0	1.1	3.3	1.1	2.1
Furniture / Floor Coverings / Household Textiles	10.8	1.3	0	1.4	0	2.5
DIY / Decorating	4.5	2.4	0	0	1.1	2.4
Domestic Appliances	13.9	6.1	1.3	1.2	3.4	2.5
Entertainment / Electricals	15.5	2.4	0	2.6	2.4	2.5
Personal / Luxury Goods	23.9	14.6	2.6	4.1	1.2	0

Source: Household Telephone Survey (April 2008)

APPENDIX 2B

RETAILER REQUIREMENTS

Retailer Requirements: Hoddesdon

	Name	Type	Retail Category	Min Req (sqm)	Max Req (sqm)
1	Billabong	Clothing & Accessories	Comparison	130	465
2	Bonmarché	Clothing & Accessories	Comparison	232	325
3	British Heart Foundation	Charity Shops	Comparison	60	557
4	Halfords Ltd	Car & Travel Accessories	Comparison	325	929
5	In Store	Homeware	Comparison	743	1,115
	SUB TOTAL COMPARISON			**1,491**	**3,391**
1	Greggs plc	Bakers	Convenience	74	111
	SUB TOTAL CONVENIENCE			**74**	**111**
1	Barracuda Group Limited	Public Houses	Service	139	836
2	Subway	Fast Food/Takeaway Outlets	Service	37	139
	SUB TOTAL SERVICE			**177**	**975**
	TOTAL			**1,742**	**4,478**

APPENDIX 3

WALTHAM CROSS TOWN CENTRE HEALTHCHECK

APPENDIX 3A

KEY INDICATORS

Waltham Cross Town Centre: Key Indicators

Retail Composition by Number of Units

Retail Category	No. of Units	% of Total	UK Average (%)	Variance
Comparison	75	46.3	35.47	10.82
Convenience	16	9.88	8.71	1.17
Service	69	42.59	45.72	-3.13
Vacant	2	1.23	9.92	-8.69
Miscellaneous	0	0	0.17	-0.17
Total	162	100	100	-

Source: Experian Category Report (November, 2006)

Retailer Requirements by Use of Category and Floorspace

Use Category	No. of Requirements	Min. Floorspace (sqm gross)	Max. Floorspace (sqm gross)
Comparison	5	1,737	4,283
Convenience	0	0	0
Service	2	130	232
TOTAL	**7**	**1,867**	**4,515**

Source: Focus Property Intelligence (May 2008)

Waltham Cross Town Centre: Key Indicators

Vacancies

Vacant Units	% of Total Units	UK Average (%)
2	1.23	9.92
Source: Experian Category Report (November, 2006)		

Vacant Floorspace (sqm)	% of Total Floorspace (Sqm)	UK Average (%)
334	0.84	8.08
Source: Experian Category Report (November, 2006)		

Waltham Cross Town Centre
Convenience Goods Market Share

Zone	Comparison Goods Market Share (%)
2	1
3	2
4	13
6	2
7	4
8	2

Source: Household Telephone Survey (April 2008)

Competing Foodstores
Convenience Goods Market Share

Zone	Tesco Extra, Brookfield Centre
2	45
3	51
4	44
6	2
7	4
8	1

Source: Household Telephone Survey (April 2008)

Waltham Cross Town Centre
Comparison Goods Market Share

Zone	Comparison Goods Market Share (%)
1	1.8
2	5.1
3	13.1
4	21.1
5	2.8
6	12.4
7	5
8	3.8
9	2.1
10	0.4
11	1
12	1.3

Source: Household Telephone Survey (April 2008)

Waltham Cross Town Centre
Comparison Goods Market Share by Goods Category

	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Clothing / Footwear	2.1	4.4	10.5	0	6.4	1.1	2.2	0
Furniture / Floor Coverings / Household Textiles	16.4	29.3	31.6	13.9	23.7	16.9	15.6	4.7
DIY / Decorating	24.7	61.9	61.6	8.9	39.8	6	2.2	18
Domestic Appliances	2.4	7.9	15	0	6.4	2.6	0	2.4
Entertainment / Electricals	1.2	4.1	15.8	0	4.1	0..0	0	0
Personal / Luxury Goods	1.2	9	21.7	1.4	13.3	6.3	3.7	0

Source: Household Telephone Survey (April 2008)

APPENDIX 3B

RETAILER REQUIREMENTS

Retailer Requirements: Waltham Cross

	Name	Type	Retail Category	Min Req (sqm)	Max Req (sqm)
1	The Body Shop	Cosmetics/Beauty Products	Comparison	74	186
2	Phones 4 U	Mobile Phones	Comparison	56	84
3	T K Maxx	Variety/Discount Stores	Comparison	1,394	3,716
4	Priceless	Footwear	Comparison	139	186
5	Barnardos	Charity Chops	Comparison	74	111
	SUB TOTAL COMPARISON			**1,737**	**4,283**
1	Costa Coffee	Coffee Shop	Service	93	93
2	Subway	Fast Food/Takeaway Outlets	Service	37	139
	SUB TOTAL SERVICE			**130**	**232**
	TOTAL			**1,867**	**4,515**

APPENDIX 3C

STURLAS WAY DEVELOPMENT OPPORTUNITY SITE PLAN

WALTHAM CROSS TOWN CENTRE

STURLAS WAY DEVELOPMENT OPPORTUNITY SITE

APPENDIX 4

CHESHUNT DISTRICT CENTRE HEALTHCHECK

APPENDIX 4A

KEY INDICATORS

Cheshunt District Centre: Key Indicators

Retail Composition by Number of Units

Retail Category	No. of Units	% of Total	UK Average (%)	Variance
Comparison	29	33.33	35.47	-2.14
Convenience	8	9.2	8.71	0.49
Convenience	8	9.2	8.71	0.49
Service	49	56.32	45.72	10.6
Vacant	1	1.15	9.92	-8.77
Miscellaneous	0	0	0.17	-0.17
Total	87	100	100	
Source: Experian Category Report (April, 2006)				

Vacancies

Vacant Units	% of Total Units	UK Average (%)
1	1.15	9.92
Source: Experian Category Report (April, 2006)		

Vacant Floorspace (sqm)	% of Total Floorspace (Sqm)	UK Average (%)
139	0.71	8.08
Source: Experian Category Report (April, 2006)		

Cheshunt District Centre
Covenience Goods Market Share

Zone	Convenience Goods Market Share (%)
1	1
2	12
3	11
4	21
5	7
6	14
7	1
9	1
11	1
12	1

Source: Household Telephone Survey (April 2008)

Cheshunt District Centre
Comparison Goods Market Share

Zone	Comparison Goods Market Share (%)
2	2.6
3	3.9
4	4.1
5	0.2
6	0.7
9	0.4
12	0.9

Source: Household Telephone Survey (April 2008)

Cheshunt District Centre
Comparison Goods Market Share by Goods Category

	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 9	Zone 12
Clothing / Footwear	0	0	0	0	0	0	0
Furniture / Floor Coverings / Household Textiles	0	0	3.9	0	1.3	0	1.3
DIY / Decorating	4.7	4.8	2.3	0	2.3	0	1.2
Domestic Appliances	3.7	2.6	5	0	0	0	0
Entertainment / Electricals	1.2	6.9	2.6	1.3	0	0	0
Personal / Luxury Goods	6.1	7.7	8.7	0	1.2	1.3	2.3

Source: Household Telephone Survey (April 2008)

APPENDIX 5

BROOKFIELD OUT OF TOWN CENTRE HEALTHCHECK

APPENDIX 5A

KEY INDICATORS

Brookfield Centre: Key Indicators

Retail Composition by Number of Units

Retail Category	No. of Units	% of Total	UK Average (%)	Variance
Comparison	9	56.25	35.47	20.78
Convenience	2	12.5	8.71	3.79
Service	4	25	45.72	-20.72
Vacant	1	6.25	9.92	-3.67
Miscellaneous	0	0	0.17	-0.17
TOTAL	**16**	**100**	**100**	**-**
Source: Experian Category Report (April, 2006)				

Retailer Requirements by Use Category and Floorspace

Use Category	No. of Requirements	Min. Floorspace (sqm gross)	Max. Floorspace (sqm gross)
Comparison	4	465	1,301
Convenience	0	0	0
Service	5	3,477	4,645
TOTAL	**9**	**4,041**	**5,946**
Source: Focus Property Intelligence (May 2008)			

Brookfield Centre: Key Indicators

Vacancies

Vacant Units	% of Total Units	UK Average (%)
1	6.25	9.92
Source: Experian Category Report (April, 2006)		

Vacant Floorspace (sqm)	% of Total Floorspace (Sqm)	UK Average (%)
474	1.68	8.08
Source: Experian Category Report (April, 2006)		

Brookfield Centre
Covenience Goods Market Share

Zone	Brookfield Convenience Goods Market Share (%)
1	7
2	49
3	54
4	44
5	7
6	3
7	4
8	1
9	9
10	3
11	3
12	4

Source: Household Telephone Survey (April 2008)

Competing foodstore
Covenience Goods Market Share

Zone	Sainsbury's, Brewery Road, Hoddesdon (%)
1	57
2	21
3	1
4	2
5	10
6	0
7	0
8	3
9	0
10	1
11	2
12	7

Source: Household Telephone Survey (April 2008)

Brookfield Centre
Comparison Goods Market Share

Zone	Comparison Goods Market Share (%)
1	10.1
2	18
3	18.2
4	19.1
5	4.6
6	6
7	3.3
8	2
9	4.8
10	3.7
11	5.1
12	7.9

Source: Household Telephone Survey (April 2008)

Brookfield Centre
Comparison Goods Market Share by Goods Category

	Zone											
	1	2	3	4	5	6	7	8	9	10	11	12
Clothing / Footwear	31.2	42.5	42.9	43.2	13.3	17	12.3	4.4	12.7	11.4	19	24.2
Furniture / Floor Coverings / Household Textiles	5.4	8.9	8	13.2	0	2.6	0	1.3	1.6	3.2	0	1.3
DIY / Decorating	0	2.4	1.2	0	0	1.1	0	0	0	0	0	0
Domestic Appliances	1.3	9.8	1.3	3.8	1.2	1.3	0	1.3	3.5	1.6	0	2.5
Entertainment / Electricals	1.4	9.8	5.5	7.9	2.6	1.4	1.5	1.3	1.5	1.7	0	2.5
Personal / Luxury Goods	4.5	12.2	19.2	17.4	2.7	3.6	0	1.2	2.7	0	1.2	3.5

Source: Household Telephone Survey (April 2008)

APPENDIX 5B

CHESHUNT/BROOKFIELD RETAILER REQUIRMENTS

Retailer Requirements: Cheshunt/Brookfield Centre

	Name	Type	Retail Category	Min Req (sqm)	Max Req (sqm)
1	Superdrug Stores Plc	Cosmetics/Toiletries	Comparison	186	557
2	Billabong	Clothing & Accessories	Comparison	130	465
3	The Body Shop	Cosmetics/Beauty Products	Comparison	74	186
4	T-Mobile (UK) Retail Limited	Mobile Phones	Comparison	74	93
	SUB TOTAL COMPARISON			**465**	**1,301**
1	Barracuda Group Limited	Public House	Service	465	836
2	Costa Coffee	Coffee Shop	Service	93	93
3	LA Fitness	Gym/Fitness Centre	Service	1,394	1,579
4	Liquid	Nightclub	Service	1,394	1,858
5	Venture UK PLC	Photography	Service	232	279
	SUB TOTAL SERVICE			**3,577**	**4,645**
	TOTAL			**4,041**	**5,946**

APPENDIX 6

FOODSTORE REPRESENTATION

Foodstores

Town Centre / District Centre and Out of Centre

Store (location)	*Size (sq. m net)*	*Date of Opening*	*No of Checkouts*	*% Non-food*	*Mezzanine Floor*	*Deli*	*Bakery*	*Café*	*Hot food Counter*	*Pharmacy*	*Fish Monger*	*Butcher*	*Petrol Station*
Sainsbury's, Brewery Road, Hoddesdon	2,787	2001	26	20%	X	✓	✓	✓	✓	✓	✓	✓	✓
Sainsbury's, Pavilion Centre, Waltham Cross	1,532	1973	12	0%	X	✓	X	X	X	X	X	X	X
Tesco, Brookfield Centre	8,152	1983	45	25%	X	✓	✓	✓	✓	✓	✓	✓	✓
Tesco, Turners Hill, Cheshunt	1,323	1964	12	0%	X	X	X	X	X	X	X	X	X

Source: GVA Grimley/Goad/IGD

APPENDIX 7

CAPACITY PROJECTIONS: CONVENIENCE GOODS

BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY 2008

TABLE 1
SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	2008	2013	2018	2023	2026
1	EN11 0/8/9	20,358	21,069	21,637	22,210	22,630
2	EN 10 6/7	15,367	15,893	16,332	16,749	17,041
3	EN 7 5/6	21,333	22,263	22,962	23,674	24,190
4	EN 8 0/7/8/9	33,567	34,530	35,319	36,168	36,853
5	CM 19 5, EN 9 2	13,483	13,981	14,509	14,872	15,068
6	EN 9 1/2, 1G 10 4, E4 7	34,671	35,191	35,929	36,645	37,112
7	EN 3 4/5/6/7	51,135	53,436	55,380	57,507	58,841
8	EN 2 8/9, EN1 1/3/4, EN 2 0/6/7	70,686	71,690	72,704	74,006	74,772
9	EN 6 1/4/5	15,780	15,576	15,518	15,555	15,572
10	SG 13 8, AL 9 6, SG 14 1	9,923	10,110	10,311	10,552	10,683
11	SG 14 2/3, SG 12 0/7	33,853	34,417	35,146	36,120	36,695
12	SG 13 7, SG 12 8/9	21,555	22,303	23,067	23,938	24,398
TOTAL		**341,711**	**350,459**	**358,814**	**367,996**	**373,855**

SOURCE: Experian Business Solutions, April 2008

TABLE 1A
POPULATION GROWTH RATES

2008-2013 (%)	2008-2018 (%)	2008-2023 (%)	2008-2026 (%)
3.5	6.3	9.1	11.2
3.4	6.3	9.0	10.9
4.4	7.6	11.0	13.4
2.9	5.2	7.7	9.8
3.7	7.6	10.3	11.8
1.5	3.6	5.7	7.0
4.5	8.3	12.5	15.1
1.4	2.9	4.7	5.8
-1.3	-1.7	-1.4	-1.3
1.9	3.9	6.3	7.7
1.7	3.8	6.7	8.4
3.5	7.0	11.1	13.2
2.6	5.0	7.7	9.4

BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY 2008

TABLE 2
CONVENIENCE GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2006 PRICES)

GROWTH IN PER CAPITA RETAIL EXPENDITURE:	0.70	%pa 2006-2026										
	2006		2008		2013		2018		2023		2026	
		Minus SFT at 2%		Minus SFT at 2.66%		Minus SFT at 3.57%		Minus SFT at 4%		Minus SFT at 4%		Minus SFT at 4%
ZONE												
1	1,679	1,645	1,703	1,657	1,763	1,700	1,826	1,753	1,890	1,815	1,930	1,853
2	1,778	1,742	1,803	1,755	1,867	1,800	1,933	1,856	2,002	1,922	2,044	1,962
3	1,680	1,646	1,704	1,658	1,764	1,701	1,827	1,754	1,892	1,816	1,932	1,854
4	1,678	1,644	1,702	1,656	1,762	1,699	1,825	1,752	1,889	1,814	1,929	1,852
5	1,783	1,747	1,808	1,760	1,872	1,805	1,939	1,861	2,007	1,927	2,050	1,968
6	1,780	1,744	1,805	1,757	1,869	1,802	1,935	1,858	2,004	1,924	2,046	1,965
7	1,547	1,516	1,569	1,527	1,624	1,566	1,682	1,615	1,742	1,672	1,779	1,707
8	1,702	1,668	1,726	1,680	1,787	1,723	1,851	1,777	1,916	1,840	1,957	1,879
9	1,869	1,832	1,895	1,845	1,963	1,892	2,032	1,951	2,104	2,020	2,149	2,063
10	1,820	1,784	1,846	1,796	1,911	1,843	1,979	1,900	2,049	1,967	2,092	2,009
11	1,776	1,740	1,801	1,753	1,865	1,798	1,931	1,854	2,000	1,920	2,042	1,960
12	1,765	1,730	1,790	1,742	1,853	1,787	1,919	1,842	1,987	1,908	2,029	1,948

Source: Experian Business Strategies May 2008

BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY 2008

TABLE 3
SURVEY AREA - TOTAL CONVENIENCE GOODS RETAIL EXPENDITURE FORECASTS

ZONE	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	33,739	35,819	37,920	40,306	41,937
2	26,969	28,613	30,311	32,188	33,442
3	35,376	37,871	40,266	42,989	44,854
4	55,597	58,669	61,862	65,598	68,254
5	23,729	25,241	27,003	28,661	29,653
6	60,917	63,426	66,756	70,503	72,911
7	78,083	83,703	89,427	96,158	100,469
8	118,753	123,548	129,164	136,144	140,462
9	29,112	29,477	30,274	31,423	32,123
10	17,826	18,631	19,588	20,758	21,460
11	59,346	61,892	65,154	69,337	71,930
12	37,553	39,859	42,497	45,667	47,529
TOTAL	**577,001**	**606,750**	**640,224**	**679,731**	**705,023**

Source: Tables 1 & 2

BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY 2008

HODDESDON TOWN CENTRE

TABLE 4
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	SAINSBURYS, BREWERY ROAD					TESCO EXPRESS, HIGH STREET					ALDI, FAWKON WALK					HODDESON LOCAL STORES					TOTAL				
	2008	2013	2018	2023	2026	2008	2013	2018	2023	2026	2008	2013	2018	2023	2026	2008	2013	2018	2023	2026	2008	2013	2018	2023	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%) (%)		(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	57	57	57	57	57	3	3	3	3	3	0	0	0	0	0	8	8	8	8	8	68	68	68	68	68
2	21	21	21	21	21	3	3	3	3	3	0	0	0	0	0	4	4	4	4	4	28	28	28	28	28
3	1	1	1	1	1	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1	3	3	3	3	3
4	2	2	2	2	2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	4	4	4	4	4
5	10	10	10	10	10	1	1	1	1	1	1	1	1	1	1	2	2	2	2	2	13	13	13	13	13
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	3	3	3	3	3	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	4	4	4	4	4
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	1	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1
11	2	2	2	2	2	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	3	3	3	3	3
12	7	7	7	7	7	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	9	9	9	9	9

SOURCE: Household Survey, April 2008

TABLE 5
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	SAINSBURYS, BREWERY ROAD					TESCO EXPRESS, HIGH STREET					ALDI, FAWKON WALK					HODDESON LOCAL STORES					TOTAL				
	2008	2013	2018	2023	2026	2008	2013	2018	2023	2026	2008	2013	2018	2023	2026	2008	2013	2018	2023	2026	2008	2013	2018	2023	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000) (£000)		(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	19,274	20,462	21,662	23,025	23,956	1,037	1,101	1,166	1,239	1,290	0	0	0	0	0	2,783	2,955	3,128	3,325	3,460	23,095	24,518	25,956	27,590	28,706
2	5,711	6,059	6,418	6,816	7,081	823	873	924	982	1,020	0	0	0	0	0	1,052	1,116	1,182	1,255	1,304	7,585	8,047	8,525	9,053	9,405
3	265	284	302	322	336	265	284	302	322	336	0	0	0	0	0	371	398	423	451	471	902	966	1,027	1,096	1,144
4	834	880	928	984	1,024	417	440	464	492	512	417	440	464	492	512	417	440	464	492	512	2,085	2,200	2,320	2,460	2,560
5	2,414	2,568	2,748	2,916	3,017	160	170	182	193	200	178	189	203	215	222	439	467	500	530	549	3,192	3,395	3,632	3,855	3,988
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	4,127	4,293	4,488	4,731	4,881	327	340	355	374	386	0	0	0	0	0	653	680	710	749	773	5,106	5,313	5,554	5,854	6,040
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	232	242	255	270	279	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	232	242	255	270	279
11	890	928	977	1,040	1,079	0	0	0	0	0	0	0	0	0	0	608	634	668	711	737	1,498	1,563	1,645	1,751	1,816
12	2,779	2,950	3,145	3,379	3,517	0	0	0	0	0	0	0	0	0	0	507	538	574	617	642	3,286	3,488	3,719	3,996	4,159
TOTALS	**36,526**	**38,666**	**40,923**	**43,484**	**45,171**	**3,029**	**3,208**	**3,394**	**3,603**	**3,744**	**595**	**629**	**666**	**707**	**734**	**6,831**	**7,228**	**7,649**	**8,130**	**8,447**	**46,981**	**49,731**	**52,632**	**55,924**	**58,097**

SOURCE: Tables 3 & 4

BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY 2008

WALTHAM CROSS TOWN CENTRE

TABLE 6
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	SAINSBURY'S, PAVILLION CENTRE					WALTHAM CROSS LOCAL STORES					TOTAL				
	2008	2013	2018	2023	2026	2008	2013	2018	2023	2026	2008	2013	2018	2023	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1
3	2	2	2	2	2	0	0	0	0	0	2	2	2	2	2
4	12	12	12	12	12	1	1	1	1	1	13	13	13	13	13
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	2	2	2	2	2	0	0	0	0	0	2	2	2	2	2
7	2	2	2	2	2	2	2	2	2	2	4	4	4	4	4
8	2	2	2	2	2	1	1	1	1	1	2	2	2	2	2
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: Household Survey, April 2008

TABLE 7
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	SAINSBURY'S, PAVILLION CENTRE					WALTHAM CROSS LOCAL STORES					TOTAL				
	2008	2013	2018	2023	2026	2008	2013	2018	2023	2026	2008	2013	2018	2023	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	81	86	91	97	100	81	86	91	97	100	162	172	182	193	201
3	637	682	725	774	807	0	0	0	0	0	637	682	725	774	807
4	6,588	6,952	7,331	7,773	8,088	751	792	835	886	921	7,339	7,744	8,166	8,659	9,009
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	1,097	1,142	1,202	1,269	1,312	0	0	0	0	0	1,097	1,142	1,202	1,269	1,312
7	1,640	1,758	1,878	2,019	2,110	1,171	1,256	1,341	1,442	1,507	2,811	3,013	3,219	3,462	3,617
8	1,781	1,853	1,937	2,042	2,107	653	680	710	749	773	2,434	2,533	2,648	2,791	2,879
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	163	170	179	191	198	163	170	179	191	198
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**11,824**	**12,472**	**13,163**	**13,974**	**14,525**	**2,819**	**2,983**	**3,157**	**3,364**	**3,499**	**14,643**	**15,456**	**16,320**	**17,338**	**18,024**

SOURCE: Tables 3 & 6

BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY 2008

CHESHUNT DISTRICT CENTRE

TABLE 8
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	TESCO, TURNERS HILL					CHESHUNT LOCAL STORES					TOTAL				
	2008	2013	2018	2023	2026	2008	2013	2018	2023	2026	2008	2013	2018	2023	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
2	4	4	4	4	4	1	1	1	1	1	5	5	5	5	5
3	11	11	11	11	11	3	3	3	3	3	14	14	14	14	14
4	14	14	14	14	14	1	1	1	1	1	15	15	15	15	15
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
7	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1

SOURCE: Household Survey, April 2008

TABLE 9
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	TESCO, TURNERS HILL					CHESHUNT LOCAL STORES					TOTAL				
	2008	2013	2018	2023	2026	2008	2013	2018	2023	2026	2008	2013	2018	2023	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	354	376	398	423	440	0	0	0	0	0	354	376	398	423	440
2	978	1,037	1,099	1,167	1,212	330	351	371	410	410	1,308	1,388	1,470	1,561	1,622
3	3,865	4,137	4,399	4,697	4,900	1,159	1,240	1,319	1,469	1,469	5,023	5,378	5,718	6,104	6,369
4	7,811	8,243	8,692	9,216	9,590	334	352	371	410	410	8,145	8,595	9,063	9,610	9,999
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	457	476	501	529	547	0	0	0	0	0	457	476	501	529	547
7	586	628	671	721	754	0	0	0	0	0	586	628	671	721	754
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	313	317	325	338	345	0	0	0	0	0	313	317	325	338	345
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	282	299	319	343	356	0	0	0	0	0	282	299	319	343	356
TOTALS	**14,645**	**15,513**	**16,403**	**17,433**	**18,145**	**1,823**	**1,943**	**2,061**	**2,288**	**2,288**	**16,468**	**17,456**	**18,464**	**19,629**	**20,433**

SOURCE: Tables 3 & 8

BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY 2008

BROOKFIELD CENTRE

TABLE 10
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	TESCO EXTRA					MARKS & SPENCER SIMPLY FOOD					TOTAL				
	2008	2013	2018	2023	2026	2008	2013	2018	2023	2026	2008	2013	2018	2023	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	7	7	7	7	7	0	0	0	0	0	7	7	7	7	7
2	45	45	45	45	45	5	5	5	5	5	49	49	49	49	49
3	51	51	51	51	51	3	3	3	3	3	54	54	54	54	54
4	44	44	44	44	44	0	0	0	0	0	44	44	44	44	44
5	7	7	7	7	7	0	0	0	0	0	7	7	7	7	7
6	2	2	2	2	2	1	1	1	1	1	3	3	3	3	3
7	4	4	4	4	4	0	0	0	0	0	4	4	4	4	4
8	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
9	9	9	9	9	9	1	1	1	1	1	9	9	9	9	9
10	1	1	1	1	1	2	2	2	2	2	3	3	3	3	3
11	3	3	3	3	3	0	0	0	0	0	3	3	3	3	3
12	4	4	4	4	4	0	0	0	0	0	4	4	4	4	4

SOURCE: Household Survey, April 2008

TABLE 11
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	TESCO EXTRA					MARKS & SPENCER SIMPLY FOOD					TOTAL				
	2008	2013	2018	2023	2026	2008	2013	2018	2023	2026	2008	2013	2018	2023	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	2,345	2,489	2,635	2,801	2,915	101	107	114	121	126	2,446	2,597	2,749	2,922	3,040
2	12,055	12,790	13,549	14,388	14,948	1,261	1,338	1,417	1,505	1,563	13,316	14,127	14,966	15,893	16,512
3	17,980	19,248	20,465	21,849	22,797	1,035	1,108	1,178	1,257	1,312	19,015	20,356	21,643	23,106	24,109
4	24,324	25,668	27,065	28,699	29,861	0	0	0	0	0	24,324	25,668	27,065	28,699	29,861
5	1,584	1,685	1,802	1,913	1,979	0	0	0	0	0	1,584	1,685	1,802	1,913	1,979
6	1,371	1,427	1,502	1,586	1,641	533	555	584	617	638	1,904	1,982	2,086	2,203	2,278
7	2,811	3,013	3,219	3,462	3,617	0	0	0	0	0	2,811	3,013	3,219	3,462	3,617
8	1,217	1,266	1,324	1,395	1,440	0	0	0	0	0	1,217	1,266	1,324	1,395	1,440
9	2,474	2,506	2,573	2,671	2,730	218	221	227	236	241	2,693	2,727	2,800	2,907	2,971
10	232	242	255	270	279	321	335	353	374	386	553	578	607	643	665
11	1,498	1,563	1,645	1,751	1,816	0	0	0	0	0	1,498	1,563	1,645	1,751	1,816
12	1,380	1,465	1,562	1,678	1,747	0	0	0	0	0	1,380	1,465	1,562	1,678	1,747
TOTALS	**69,272**	**73,362**	**77,597**	**82,464**	**85,770**	**3,469**	**3,664**	**3,872**	**4,109**	**4,266**	**72,741**	**77,026**	**81,469**	**86,573**	**90,036**

SOURCE: Tables 3 & 10

TABLE 12
HODDESDON TOWN CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Sainbury's, Brewery Road	2,787	80%	2,230	9,204	20,521
Tesco Express, High Street	262	100%	262	10,873	2,849
Aldi, Fawkon Walk	936	100%	936	3,660	3,426
Other	3,116	100%	3,116	2,500	7,791
SUB TOTAL	**7,101**		**6,544**	**5,285**	**34,586**

Source: IGD

TABLE 13
WALTHAM CROSS TOWN CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Sainsbury's, Pavillian Centre	1,532	100%	1,532	9,204	14,101
Other	1,614	100%	1,614	2,500	4,035
SUB TOTAL	**3,146**		**3,146**	**5,765**	**18,136**

Source: IGD

TABLE 14
CHESHUNT DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Tesco, Turners Hill	1,323	100%	1,323	10,873	14,385
Other	688	100%	688	2,500	1,720
SUB TOTAL	**2,011**		**2,011**	**8,008**	**16,105**

Source: IGD

TABLE 15
BROOKFIELD OUT-OF-TOWN CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
OUT-OF-TOWN CENTRE					
Tesco Extra	8152	60%	4,891	10,873	53,182
Marks & Spencer	836	100%	836	10,710	8,954
SUB TOTAL	**8,988**		**5,727**	**10,849**	**62,136**

Source: IGD

TABLE 16
TOTAL CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOTAL	**21,246**		**17,428**	**7,514**	**130,963**

Source: IGD

BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY 2008

TABLE 17: BROXBOURNE COUNCIL AREA: GLOBAL CAPACITY FORECASTS

		CONVENIENCE GOODS				
		2008	2013	2018	2023	2026
1.	TOTAL AVAILABLE SPEND IN ZONES 1 - 12 (£000's)	577,001	606,750	640,224	679,731	705,023
2.	ESTIMATED POTENTIAL TURNOVER OF ALL MAJOR TOWN CENTRE & OUT-OF-CENTRE CONVENIENCE GOODS FLOORSPACE IN BROXBOURNE (£000)	150,832	159,669	168,887	179,464	186,590
3.	MARKET SHARE OF BROXBOURNE CONVENIENCE GOODS FLOORSPACE FROM ZONES 1-12 (%)	26	26	26	26	26
4.	EXISTING MAJOR CONVENIENCE GOODS FLOORSPACE IN BROXBOURNE (sqm net)	17,428	17,428	17,428	17,428	17,428
5.	AVERAGE SALES DENSITY OF ALL MAJOR FLOORSPACE (£ per sqm net)	8,654	7,514	7,514	7,514	7,514
6.	DERIVED TURNOVER OF EXISTING FLOORSPACE (£000)	150,832	130,963	130,963	130,963	130,963
7.	FORECAST TURNOVER OF ALL COMMITTED FLOORSPACE (i.e. with planning permission) (£000)	0	0	0	0	0
8.	PROJECTED RESIDUAL SPENDING AFTER COMMITMENTS (£000)	0	28,706	37,924	48,502	55,627
9.	ASSUMED AVERAGE SALES DENSITY OF NEW FLOORSPACE (£/sqm net) (1)	10,000	10,000	10,000	10,000	10,000
10	**NET CAPACITY FOR NEW FLOORSPACE (sqm net)**	**0**	**2,871**	**3,792**	**4,850**	**5,563**

BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY 2008

TABLE 18: HODDESDON TOWN CENTRE: RETAIL CAPACITY ASSESSMENT

		CONVENIENCE GOODS				
		2008	2013	2018	2023	2026
1.	TOTAL AVAILABLE SPEND IN ZONES 1 - 12 (£000's)	£577,001	£606,750	£640,224	£679,731	£705,023
2.	ESTIMATED TURNOVER OF ALL HODDESDON TOWN CENTRE CONVENIENCE GOODS FLOORSPACE (£000)	£46,981	£49,731	£52,632	£55,924	£58,097
3.	MARKET SHARE OF HODDESDON TOWN CENTRE CONVENIENCE GOODS FLOORSPACE FROM ZONES 1-12 (%)	8%	8%	8%	8%	8%
4.	EXISTING CONVENIENCE GOODS FLOORSPACE IN HODDESDON TOWN CENTRE (sqm net)	6,544	6,544	6,544	6,544	6,544
5.	AVERAGE SALES DENSITY OF ALL MAJOR FLOORSPACE (£ per sqm net)	£7,179	£5,285	£5,285	£5,285	£5,285
6.	DERIVED TURNOVER OF EXISTING FLOORSPACE (£000)	£46,981	£34,586	£34,586	£34,586	£34,586
7.	FORECAST TURNOVER OF ALL COMMITTED FLOORSPACE (i.e. with planning permission) (£000)	£0	£0	£0	£0	£0
8.	PROJECTED RESIDUAL SPENDING AFTER COMMITMENTS (£000)	£0	£15,145	£18,046	£21,338	£23,510
9.	ASSUMED AVERAGE SALES DENSITY OF NEW FLOORSPACE (£/sqm net)	£10,000	£10,000	£10,000	£10,000	£10,000
10	**NET CAPACITY FOR NEW FLOORSPACE (sqm net)**	**0**	**1,514**	**1,805**	**2,134**	**2,351**

BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY 2008

TABLE 19: WALTHAM CROSS TOWN CENTRE: RETAIL CAPACITY ASSESSMENT

		CONVENIENCE GOODS				
		2008	2013	2018	2023	2026
1.	TOTAL AVAILABLE SPEND IN ZONES 1 - 12 (£000's)	£577,001	£606,750	£640,224	£679,731	£705,023
2.	ESTIMATED TURNOVER OF ALL WALTHAM CROSS TOWN CENTRE CONVENIENCE GOODS FLOORSPACE (£000)	£14,643	£15,456	£16,320	£17,338	£18,024
3.	MARKET SHARE OF WALTHAM CROSS TOWN CENTRE CONVENIENCE GOODS FLOORSPACE FROM ZONES 1-12 (%)	3%	3%	3%	3%	3%
4.	EXISTING CONVENIENCE GOODS FLOORSPACE IN WALTHAM CROSS TOWN CENTRE (sqm net)	3,146	3,146	3,146	3,146	3,146
5.	AVERAGE SALES DENSITY OF ALL MAJOR FLOORSPACE (£ per sqm net)	£4,654	£5,765	£5,765	£5,765	£5,765
6.	DERIVED TURNOVER OF EXISTING FLOORSPACE (£000)	£14,643	£18,136	£18,136	£18,136	£18,136
7.	FORECAST TURNOVER OF ALL COMMITTED FLOORSPACE (i.e. with planning permission) (£000)	£0	£0	£0	£0	£0
8.	PROJECTED RESIDUAL SPENDING AFTER COMMITMENTS (£000)	£0	-£2,680	-£1,815	-£797	-£111
9.	ASSUMED AVERAGE SALES DENSITY OF NEW FLOORSPACE (£/sqm net)	£10,000	£10,000	£10,000	£10,000	£10,000
10	**NET CAPACITY FOR NEW FLOORSPACE (sqm net)**	**0**	**-268**	**-182**	**-80**	**-11**

BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY 2008

TABLE 20: CHESHUNT DISTRICT CENTRE: RETAIL CAPACITY ASSESSMENT

		CONVENIENCE GOODS				
		2008	2013	2018	2023	2026
1.	TOTAL AVAILABLE SPEND IN ZONES 1 - 12 (£000's)	£577,001	£606,750	£640,224	£679,731	£705,023
2.	ESTIMATED TURNOVER OF ALL CHESHUNT DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE (£000)	£16,468	£17,456	£18,464	£19,629	£20,433
3.	MARKET SHARE OF CHESHUNT DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE FROM ZONES 1-12 (%)	3%	3%	3%	3%	3%
4.	EXISTING CONVENIENCE GOODS FLOORSPACE IN CHESHUNT DISTRICT CENTRE (sqm net)	2,011	2,011	2,011	2,011	2,011
5.	AVERAGE SALES DENSITY OF ALL MAJOR FLOORSPACE (£ per sqm net)	£8,188	£8,008	£8,008	£8,008	£8,008
6.	DERIVED TURNOVER OF EXISTING FLOORSPACE (£000)	£16,468	£16,105	£16,105	£16,105	£16,105
7.	FORECAST TURNOVER OF ALL COMMITTED FLOORSPACE (i.e. with planning permission) (£000)	£0	£0	£0	£0	£0
8.	PROJECTED RESIDUAL SPENDING AFTER COMMITMENTS (£000)	£0	£1,351	£2,359	£3,524	£4,328
9.	ASSUMED AVERAGE SALES DENSITY OF NEW FLOORSPACE (£/sqm net)	£10,000	£10,000	£10,000	£10,000	£10,000
10	**NET CAPACITY FOR NEW FLOORSPACE (sqm net)**	**0**	**135**	**236**	**352**	**433**

TABLE 21: BROOKFIELD OUT-OF-TOWN CENTRE: RETAIL CAPACITY ASSESSMENT

		CONVENIENCE GOODS				
		2008	2013	2018	2023	2026
1.	TOTAL AVAILABLE SPEND IN ZONES 1 - 12 (£000's)	£577,001	£606,750	£640,224	£679,731	£705,023
2.	ESTIMATED TURNOVER OF ALL BROOKFIELD OUT-OF-TOWN CENTRE CONVENIENCE GOODS FLOORSPACE (£000)	£72,741	£77,026	£81,469	£86,573	£90,036
3.	MARKET SHARE OF BROOKFIELD OUT-OF-TOWN CENTRE CENTRE CONVENIENCE GOODS FLOORSPACE FROM ZONES 1-12 (%)	13%	13%	13%	13%	13%
4.	EXISTING MAJOR CONVENIENCE GOODS FLOORSPACE IN BROOKFIELD OUT-OF-TOWN CENTRE (sqm net)	5,727	5,727	5,727	5,727	5,727
5.	AVERAGE SALES DENSITY OF ALL MAJOR FLOORSPACE (£ per sqm net)	£12,701	£10,849	£10,849	£10,849	£10,849
6.	DERIVED TURNOVER OF EXISTING FLOORSPACE (£000)	£72,741	£62,136	£62,136	£62,136	£62,136
7.	FORECAST TURNOVER OF ALL COMMITTED FLOORSPACE (i.e. with planning permission) (£000)	£0	£0	£0	£0	£0
8.	PROJECTED RESIDUAL SPENDING AFTER COMMITMENTS (£000)	£0	£14,891	£19,334	£24,437	£27,901
9.	ASSUMED AVERAGE SALES DENSITY OF NEW FLOORSPACE (£/sqm net) (1)	£10,000	£10,000	£10,000	£10,000	£10,000
10	**NET CAPACITY FOR NEW FLOORSPACE (sqm net)**	**0**	**1,489**	**1,933**	**2,444**	**2,790**

APPENDIX 8

CAPACITY PROJECTIONS: COMPARISON GOODS

BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY 2008

TABLE 1
SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	2008	2013	2018	2023	2026
1	EN11 0/8/9	20,358	21,069	21,637	22,210	22,630
2	EN 10 6/7	15,367	15,893	16,332	16,749	17,041
3	EN 7 5/6	21,333	22,263	22,962	23,674	24,190
4	EN 8 0/7/8/9	33,567	34,530	35,319	36,168	36,853
5	CM 19 5, EN 9 2	13,483	13,981	14,509	14,872	15,068
6	EN 9 1/2, 1G 10 4, E4 7	34,671	35,191	35,929	36,645	37,112
7	EN 3 4/5/6/7	51,135	53,436	55,380	57,507	58,841
8	EN 2 8/9, EN1 1/3/4, EN 2 0/6/7	70,686	71,690	72,704	74,006	74,772
9	EN 6 1/4/5	15,780	15,576	15,518	15,555	15,572
10	SG 13 8, AL 9 6, SG 14 1	9,923	10,110	10,311	10,552	10,683
11	SG 14 2/3, SG 12 0/7	33,853	34,417	35,146	36,120	36,695
12	SG 13 7, SG 12 8/9	21,555	22,303	23,067	23,938	24,398
TOTAL		**341,711**	**350,459**	**358,814**	**367,996**	**373,855**

SOURCE: Experian Business Solutions, April 2008

TABLE 1A
POPULATION GROWTH RATES

2008-2013 (%)	2008-2018 (%)	2008-2023 (%)	2008-2026 (%)
3.5	6.3	9.1	11.2
3.4	6.3	9.0	10.9
4.4	7.6	11.0	13.4
2.9	5.2	7.7	9.8
3.7	7.6	10.3	11.8
1.5	3.6	5.7	7.0
4.5	8.3	12.5	15.1
1.4	2.9	4.7	5.8
-1.3	-1.7	-1.4	-1.3
1.9	3.9	6.3	7.7
1.7	3.8	6.7	8.4
3.5	7.0	11.1	13.2
2.6	5.0	7.7	9.4

BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY 2008

TABLE 2
COMPARISON GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2006 PRICES)

GROWTH IN PER CAPITA RETAIL EXPENDITURE: 3.80 %pa 2006-2026

ZONE	2006	2006 Minus SFT at 7%	2008	2008 Minus SFT at 9%	2013	2013 Minus SFT at 11.7%	2018	2018 Minus SFT at 12.5%	2023	2023 Minus SFT at 12.5%	2026	2026 Minus SFT at 12.5%
1	3,143	2,923	3,386	3,082	4,081	3,603	4,917	4,302	5,925	5,185	6,627	5,798
2	3,320	3,088	3,577	3,255	4,310	3,806	5,194	4,545	6,259	5,476	7,000	6,125
3	3,155	2,934	3,399	3,093	4,096	3,617	4,936	4,319	5,948	5,204	6,652	5,820
4	3,028	2,816	3,263	2,969	3,931	3,471	4,737	4,145	5,708	4,995	6,384	5,586
5	3,277	3,048	3,531	3,213	4,255	3,757	5,127	4,486	6,178	5,406	6,909	6,045
6	3,231	3,005	3,481	3,168	4,195	3,704	5,055	4,423	6,091	5,330	6,812	5,961
7	2,694	2,505	2,903	2,641	3,498	3,088	4,215	3,688	5,079	4,444	5,680	4,970
8	3,051	2,837	3,287	2,991	3,961	3,498	4,773	4,177	5,752	5,033	6,433	5,629
9	3,446	3,205	3,713	3,379	4,474	3,951	5,391	4,717	6,496	5,684	7,265	6,357
10	3,400	3,162	3,663	3,334	4,414	3,898	5,319	4,654	6,410	5,608	7,168	6,272
11	3,295	3,064	3,550	3,231	4,278	3,777	5,155	4,511	6,212	5,435	6,947	6,079
12	3,337	3,103	3,595	3,272	4,332	3,826	5,221	4,568	6,291	5,505	7,036	6,156

Source: Experian Business Strategies and Expenditure Data for Broxbourne

TABLE 3
SURVEY AREA COMPARISON GOODS RETAIL EXPENDITURE FORECASTS

ZONE	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	62,736	75,916	93,093	115,148	131,215
2	50,022	60,490	74,226	91,725	104,373
3	65,991	80,524	99,171	123,207	140,796
4	99,656	119,866	146,400	180,652	205,866
5	43,321	52,524	65,086	80,391	91,093
6	109,835	130,350	158,913	195,306	221,211
7	135,068	165,034	204,233	255,553	292,437
8	211,452	250,751	303,652	372,454	420,859
9	53,316	61,534	73,203	88,420	98,995
10	33,079	39,407	47,991	59,180	67,008
11	109,368	130,008	158,529	196,321	223,058
12	70,525	85,322	105,372	131,767	150,198
TOTAL	**1,044,369**	**1,251,725**	**1,529,868**	**1,890,124**	**2,147,110**

Source: Tables 1&2

BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY 2008

TABLE 4
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Hoddesdon Town Centre 2008 (%)	2013 (%)	2018 (%)	2023 (%)	2026 (%)
1	13.0	13.0	13.0	13.0	13.0
2	5.5	5.5	5.5	5.5	5.5
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	1.5	1.5	1.5	1.5	1.5
12	1.7	1.7	1.7	1.7	1.7

TABLE 5
COMPARISON GOODS SPEND (£)

Catchment Zone	Hoddesdon Town Centre 2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	8,162	9,877	12,112	14,982	17,072
2	2,761	3,339	4,097	5,063	5,761
3	763	931	1,146	1,424	1,627
4	0	0	0	0	0
5	1,173	1,422	1,762	2,176	2,466
6	371	440	537	660	747
7	203	248	307	384	439
8	714	847	1,026	1,258	1,422
9	159	184	218	264	295
10	61	73	89	109	124
11	1,589	1,888	2,303	2,852	3,240
12	1,192	1,442	1,781	2,227	2,539
Total	17,148	20,691	25,377	31,399	35,732

Source: Tables 3 & 4

TABLE 6
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Waltham Cross Town Centre 2008 (%)	2013 (%)	2018 (%)	2023 (%)	2026 (%)
1	1.8	1.8	1.8	1.8	1.8
2	5.1	5.1	5.1	5.1	5.1
3	13.1	13.1	13.1	13.1	13.1
4	21.1	21.1	21.1	21.1	21.1
5	2.8	2.8	2.8	2.8	2.8
6	12.4	12.4	12.4	12.4	12.4
7	5.0	5.0	5.0	5.0	5.0
8	3.8	3.8	3.8	3.8	3.8
9	2.1	2.1	2.1	2.1	2.1
10	0.4	0.4	0.4	0.4	0.4
11	1.0	1.0	1.0	1.0	1.0
12	1.3	1.3	1.3	1.3	1.3

TABLE 7
COMPARISON GOODS SPEND (£)

Catchment Zone	Waltham Cross Town Centre 2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	627	1,333	931	1,151	1,312
2	2,551	3,085	3,785	4,678	5,323
3	8,633	10,534	12,974	16,118	18,419
4	21,044	25,311	30,915	38,148	43,472
5	1,218	1,476	1,829	2,260	2,560
6	13,663	16,215	19,769	24,296	27,519
7	6,716	8,206	10,155	12,707	14,541
8	8,024	9,515	11,523	14,134	15,971
9	1,103	1,273	1,514	1,829	2,048
10	140	167	203	250	284
11	1,134	1,348	1,644	2,036	2,313
12	890	1,077	1,331	1,664	1,897
Total	65,744	79,541	96,572	119,270	135,657

Source: Tables 3 & 6

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TABLE 8
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Cheshunt District Centre 2008 (%)	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	3.9	3.9	3.9	3.9	3.9
4	4.1	4.1	4.1	4.1	4.1
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 2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	627	0	931	1,151	1,312
2	1,320	1,596	1,959	2,420	2,754
3	2,550	3,111	3,831	4,760	5,440
4	4,086	4,915	6,003	7,407	8,441
5	88	107	133	164	186
6	724	859	1,048	1,288	1,458
7	0	0	0	0	0
8	0	0	0	0	0
9	195	225	268	324	362
10	0	0	0	0	0
11	0	0	0	0	0
12	633	766	946	1,183	1,348
Total	10,224	11,579	15,118	18,697	21,301

Source: Tables 3 & 8

TABLE 10
COMPARISON GOODS MARKET SHARE (%)

	Brookfield Out of Town Centre				
Catchment Zone	2008 (%)	2013 (%)	2018 (%)	2023 (%)	2026 (%)
1	10.1	10.1	10.1	10.1	10.1
2	18.0	18.0	18.0	18.0	18.0
3	18.2	18.2	18.2	18.2	18.2
4	19.6	19.6	19.6	19.6	19.6
5	4.6	4.6	4.6	4.6	4.6
6	6.0	6.0	6.0	6.0	6.0
7	3.3	3.3	3.3	3.3	3.3
8	2.0	2.0	2.0	2.0	2.0
9	4.8	4.8	4.8	4.8	4.8
10	3.7	3.7	3.7	3.7	3.7
11	5.1	5.1	5.1	5.1	5.1
12	7.9	7.9	7.9	7.9	7.9

TABLE 11
COMPARISON GOODS SPEND (£)

	Brookfield Out of Town Centre				
Catchment Zone	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2026 (£000)
1	6,343	7,676	9,412	11,642	13,267
2	9,008	10,893	13,367	16,518	18,796
3	12,027	14,675	18,074	22,454	25,660
4	19,498	23,452	28,644	35,345	40,278
5	1,999	2,424	3,004	3,710	4,204
6	6,620	7,856	9,578	11,771	13,332
7	4,450	5,437	6,729	8,420	9,635
8	4,141	4,911	5,947	7,294	8,242
9	2,543	2,935	3,492	4,218	4,722
10	1,227	1,462	1,781	2,196	2,486
11	5,538	6,583	8,027	9,940	11,294
12	5,576	6,747	8,332	10,419	11,876
Total	78,971	95,051	116,385	143,928	163,793

Source: Tables 3 & 10

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 2008 £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

TABLE 14

FUTURE SHOP FLOORSPACE CAPACITY: GLOBAL CAPACITY FORECASTS

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2	%pa '08-'26		
	COMPARISON GOODS				
	2008	2013	2018	2023	2026
Total Available Expenditure (£000)	1,044,369	1,251,725	1,529,868	1,890,124	2,147,110
Market Share from Survey Area (%)	16	16	16	16	16
Survey Area Residents Spending (£000)	172,087	206,863	253,452	313,293	356,484
Inflow ***to Waltham Cross & Brookfield Centre*** from Beyond Survey Area (5%) £000	7,617	9,189	11,208	13,853	15,761
Total Town Centre Turnover	172,087	206,863	253,452	313,293	356,484
Existing Shop Floorspace (sq m net)	51,502	51,502	51,502	51,502	51,502
Sales per sq m net £	3,341	3,689	4,073	4,497	4,772
Sales from Existing Floorspace (£000)	172,087	189,998	209,773	231,606	245,782
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	16,866	43,680	81,687	110,702
Sales per sq m net in new shops (£)	3,500	3,864	4,266	4,711	4,999
Capacity for new floorspace (sq m net)	0	4,364	10,238	17,341	22,145

Source: Tables 3, 5 & 12

TABLE 15

FUTURE SHOP FLOORSPACE CAPACITY: HODDESDON TOWN CENTRE

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2	%pa '08-'26		
	COMPARISON GOODS				
	2008	2013	2018	2023	2026
Total Available Expenditure (£000)	1,044,369	1,251,725	1,529,868	1,890,124	2,147,110
Market Share from Survey Area (%)	2	2	2	2	2
Survey Area Residents Spending (£000)	17,148	20,691	25,377	31,399	35,732
Total Town Centre Turnover	17,148	20,691	25,377	31,399	35,732
Existing Shop Floorspace (sq m net)	8,798	8,798	8,798	8,798	8,798
Sales per sq m net £	1,949	2,152	2,376	2,623	2,784
Sales from Existing Floorspace (£000)	17,148	18,933	20,903	23,079	24,492
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	1,758	4,474	8,320	11,241
Sales per sq m net in new shops (£)	3,500	3,864	4,266	4,711	4,999
Capacity for new floorspace (sq m net)	0	455	1,049	1,766	2,249

Source: Tables 3, 5 & 12

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TABLE 16

FUTURE SHOP FLOORSPACE CAPACITY: WALTHAM CROSS TOWN CENTRE

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2	%pa '08-'26		
	COMPARISON GOODS				
	2008	2013	2018	2023	2026
Total Available Expenditure (£000)	1,044,369	1,251,725	1,529,868	1,890,124	2,147,110
Market Share from Survey Area (%)	6	6	6	6	6
Survey Area Residents Spending (£000)	65,744	79,541	96,572	119,270	135,657
Inflow ***to Waltham Cross Town Centre*** from Beyond Survey Area (5%) £000	3,460	4,186	5,083	6,277	7,140
Total Town Centre Turnover	69,204	83,728	101,655	125,547	142,797
Existing Shop Floorspace (sq m net)	22,260	22,260	22,260	22,260	22,260
Sales per sq m net £	3,109	3,432	3,790	4,184	4,440
Sales from Existing Floorspace (£000)	69,204	76,407	84,359	93,140	98,841
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	7,321	17,296	32,408	43,956
Sales per sq m net in new shops (£)	3,500	3,864	4,266	4,711	4,999
Capacity for new floorspace (sq m net)	0	1,894	4,054	6,880	8,793

Source: Tables 3, 7 & 12

BROXBOURNE BOROUGH COUNCIL
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TABLE 17

FUTURE SHOP FLOORSPACE CAPACITY: CHESHUNT DISTRICT CENTRE

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2	%pa '08-'26		
	COMPARISON GOODS				
	2008	2013	2018	2023	2026
Total Available Expenditure (£000)	1,044,369	1,251,725	1,529,868	1,890,124	2,147,110
Market Share from Survey Area (%)	1	1	1	1	1
Survey Area Residents Spending (£000)	10,224	11,579	15,118	18,697	21,301
Total Town Centre Turnover	10,224	11,579	15,118	18,697	21,301
Existing Shop Floorspace (sq m net)	4,459	4,459	4,459	4,459	4,459
Sales per sq m net £	2,293	2,531	2,795	3,086	3,275
Sales from Existing Floorspace (£000)	10,224	11,288	12,462	13,760	14,602
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	292	2,655	4,937	6,700
Sales per sq m net in new shops (£)	3,500	3,864	4,266	4,711	4,999
Capacity for new floorspace (sq m net)	0	76	622	1,048	1,340

Source: Tables 3, 9 & 12

BROXBOURNE BOROUGH COUNCIL
RETAIL STUDY 2008

TABLE 18

FUTURE SHOP FLOORSPACE CAPACITY: BROOKFIELD CENTRE

GROWTH IN SALES PER SQ M	COMPARISON GOODS	2	%pa '08-'26		
	COMPARISON GOODS				
	2008	2013	2018	2023	2026
Total Available Expenditure (£000)	1,044,369	1,251,725	1,529,868	1,890,124	2,147,110
Market Share from Survey Area (%)	8	8	8	8	8
Survey Area Residents Spending (£000)	78,971	95,051	116,385	143,928	163,793
Inflow ***to Brookfield Centre*** from Beyond Survey Area (5%) £000	4,156	5,003	6,126	7,575	8,621
Total Centre Turnover	83,127	100,054	122,510	151,503	172,414
Existing Shop Floorspace (sq m net)	15,985	15,985	15,985	15,985	15,985
Sales per sq m net £	5,200	5,742	6,339	6,999	7,427
Sales from Existing Floorspace (£000)	83,127	91,779	101,332	111,879	118,727
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	8,275	21,179	39,625	53,688
Sales per sq m net in new shops (£)	3,500	3,864	4,266	4,711	4,999
Capacity for new floorspace (sq m net)	0	2,141	4,964	8,412	10,740

Source: Tables 3, 11 & 12

APPENDIX 9

HOUSEHOLD TELEPHONE INTERVIEW SURVEY RESULTS

Q01 In which shop or shopping centre do you do most of your household's main food shopping ?
Those who do not buy their main food shopping on the internet at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Tesco Extra, Brookfield Centre, Cheshunt, EN8 0TA	14.6%	174	8.1%	6	53.0%	28	62.2%	49	50.5%	60	8.0%	4	3.0%	4	4.0%	7	1.0%	2	10.9%	6	1.2%	0	3.0%	4	4.9%	4
Tesco, Ware Road, Hertford, SG14 1QA	7.5%	89	6.1%	4	3.0%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	2	1.0%	2	1.0%	1	34.5%	12	29.7%	36	37.3%	29
J Sainsbury, Brewery Road, Hoddesdon, EN11 8HF	6.9%	82	62.6%	46	20.0%	11	1.0%	1	2.0%	2	9.0%	4	0.0%	0	0.0%	0	3.9%	9	0.0%	0	1.2%	0	2.0%	2	7.8%	6
Tesco, 288 High Street, Enfield, EN3 4DP	6.7%	80	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	29.0%	52	11.8%	26	3.0%	2	0.0%	0	0.0%	0	0.0%	0
J Sainsbury, 3 Crown Road, Enfield, EN1 1AJ	6.4%	76	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	1.0%	1	13.0%	23	21.6%	49	2.0%	1	1.2%	0	0.0%	0	0.0%	0
Tesco, Sewardstone Road, Waltham Abbey, EN9 1JH	5.8%	69	0.0%	0	0.0%	0	0.0%	0	1.0%	1	4.0%	2	47.5%	59	3.0%	5	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Tesco, 5-6 West Street, Ware, SG12 9EE	3.8%	45	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	27.7%	34	12.7%	10
Tesco, Savoy Parade, Enfield, EN1 1RT	3.8%	45	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	6.0%	11	14.7%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	3.4%	40	1.0%	1	0.0%	0	1.0%	1	3.0%	4	3.0%	1	8.9%	11	4.0%	7	2.0%	4	5.0%	3	0.0%	0	5.0%	6	2.9%	2
Morrisons, Southbury Road, Enfield, EN1 1TW	3.3%	39	1.0%	1	0.0%	0	1.0%	1	4.0%	5	0.0%	0	1.0%	1	10.0%	18	5.9%	13	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco, Mutton Lane, Potters Bar	2.7%	32	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	4.0%	7	2.0%	4	33.7%	19	2.4%	1	0.0%	0	0.0%	0
Tesco, 64-66 Turners Hill, Cheshunt, EN8 8LQ	2.4%	29	1.0%	1	4.0%	2	12.2%	10	10.1%	12	0.0%	0	1.0%	1	1.0%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1
J Sainsbury, 72 Shopping Pavillion, Waltham Cross, EN8 7BZ	2.1%	25	0.0%	0	0.0%	0	2.0%	2	11.1%	13	0.0%	0	2.0%	2	2.0%	4	2.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Palace Gardens Shopping Precinct, Enfield, EN2 6SN	1.9%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	2	8.8%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Bircherley Green Shopping Centre, Hertford, SG14 1BH	1.9%	22	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.4%	7	5.0%	6	8.8%	7
J Sainsbury, 7 Sainsbury Centre, Potters Bar, EN6 1AZ	1.3%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.7%	14	2.4%	1	0.0%	0	0.0%	0
Asda, Watergardens, Harlow	1.2%	15	1.0%	1	1.0%	1	0.0%	0	1.0%	1	8.0%	4	1.0%	1	0.0%	0	1.0%	2	0.0%	0	0.0%	0	1.0%	1	4.9%	4
Tesco Express, 439 Hertford Road, Enfield, EN3 5UT	1.2%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	4	4.9%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0
J Sainsbury, Allende Avenue, Harlow	1.1%	14	1.0%	1	0.0%	0	0.0%	0	1.0%	1	17.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.9%	2
Tesco, Edinburgh Way, Harlow	1.1%	13	1.0%	1	0.0%	0	0.0%	0	0.0%	0	18.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	3.9%	3
J Sainsbury, Green Lanes,	0.9%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	3.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Winchmore Hill																										
J Sainsbury, Old Station Road, Loughton, IG10 4PL	0.8%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	5.9%	7	0.0%	0	0.0%	0	3.0%	2	0.0%	0	0.0%	0	0.0%	0
Morrisons, Salisbury Hall Gardens, Chingford	0.8%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.9%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Chase Side, London	0.8%	10	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.0%	4	2.0%	4	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Great North Way, Hatfield, AL9 5JY	0.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.3%	3	5.0%	6	0.0%	0
Morrisons, Black Fan Road, Welwyn Garden City	0.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	1	4.0%	5	1.0%	1
Marks & Spencer, Brookfield Centre, Cheshunt, EN8 0NS	0.5%	6	0.0%	0	5.0%	3	3.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.4%	1	0.0%	0	0.0%	0
Netto, The Tower Centre, Hoddesdon, EN11 8UD	0.5%	6	2.0%	1	3.0%	2	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Enfield (Local Stores)	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	2.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Somerfield, 9 High Street, Cheshunt, EN8 0BX	0.5%	6	0.0%	0	0.0%	0	0.0%	0	5.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op Supermarket, 654-674 Hertford Road, Enfield, EN3 6LZ	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	4	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Potters Bar (Local Stores)	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Netto, 49 High Street, Enfield, EN3 6SL	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	1.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Somerfield, Station Road, Chingford	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op Supermarket, 7-9 Sun Street, Waltham Abbey, EN9 1ER	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
J Sainsbury, Hall Lane, Chingford	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Monkswood Way, Stevenage	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4	0.0%	0
Iceland, 106-108 High Street, Waltham Cross, EN8 7BX	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Town Centre, Hatfield	0.3%	3	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	1.2%	0	0.0%	0	1.0%	1
Hoddesdon (Local Stores)	0.3%	3	2.0%	1	1.0%	1	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 61-65 High Street, Hoddesdon, EN11 8TH	0.2%	2	2.0%	1	1.0%	1	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Fawkon Walk, Hoddesdon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Tesco Express, Hammond Court, Waltham Cross, EN7 6PJ	0.2%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Waitrose, Bridge Road, Welwyn Garden City	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.2%	0	0.0%	0	1.0%	1
Simply Food, 140-144 Fore Street, Hertford, SG14 1AJ	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	1	0.0%	0	1.0%	1
Co-Op (East & Central), 23 Station Road, Cuffley, EN6 4HX	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	0.0%	0	0.0%	0	0.0%	0
Hertford (Local Stores)	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Co-Op Late Shop, 113-117 Upshire Road, Waltham Abbey, EN9 3PE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waltham Abbey (Local Stores)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ware (Local Stores)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Waltham Cross (Local Stores)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheshunt Wash (Local Stores)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Welwyn Garden City (Local Stores)	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0
Iceland, Brocket Road, Hoddesdon, EN11 8PE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Harlow (Local Stores)	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op (East & Central), 37 High Road, Broxbourne, EN10 7HX	0.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 3 Bullsmoor Lane, Waltham Cross, EN8 7RS	0.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broxbourne High Road (Local Stores)	0.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hatfield (Local Stores)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0
(Don't know / varies)	8.9%	105	8.1%	6	5.0%	3	9.2%	7	5.1%	6	24.0%	12	8.9%	11	11.0%	20	8.8%	20	5.0%	3	10.7%	4	9.9%	12	3.9%	3
Weighted base:		1189		73		53		79		119		48		124		178		225		56		34		122		77
Sample:		1187		99		100		98		99		100		101		100		102		101		84		101		102

Q02 How does your household normally travel to its main food shopping destination (STORE MENTIONED AT Q01)?
Those who know where they do their main food shop at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Car / van (as driver)	58.7%	648	54.3%	38	69.1%	35	77.4%	58	45.4%	53	71.8%	27	51.6%	59	50.5%	82	54.3%	113	58.8%	32	62.8%	20	70.7%	79	72.4%	54
Car / van (as passenger)	16.5%	182	21.3%	15	14.4%	7	6.5%	5	19.6%	23	15.4%	6	18.3%	21	26.4%	43	20.2%	42	12.4%	7	9.0%	3	4.3%	5	9.2%	7
Bus	6.2%	68	1.1%	1	4.1%	2	5.4%	4	5.2%	6	5.1%	2	7.5%	9	8.8%	14	11.7%	24	4.1%	2	1.3%	0	3.3%	4	0.0%	0
Motorcycle	0.2%	2	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Walk	12.4%	137	13.8%	10	5.2%	3	2.2%	2	21.6%	25	1.3%	0	14.0%	16	9.9%	16	11.7%	24	20.6%	11	20.5%	7	12.0%	13	14.3%	11
Taxi	0.6%	6	1.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.1%	1	1.0%	1
Train	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	1.1%	1	0.0%	0
Bicycle	0.3%	3	1.1%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.1%	1	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.4%	26	3.2%	2	4.1%	2	2.2%	2	3.1%	4	3.8%	1	5.4%	6	1.1%	2	1.1%	2	1.0%	1	1.3%	0	3.3%	4	1.0%	1
(Don't travel / goods delivered)	2.6%	29	3.2%	2	2.1%	1	5.4%	4	5.2%	6	2.6%	1	1.1%	1	3.3%	5	1.1%	2	1.0%	1	3.8%	1	2.2%	2	2.0%	2
Weighted base:		1105		70		51		75		117		38		114		162		207		54		32		112		74
Sample:		1102		94		97		93		97		78		93		91		94		97		78		92		98

Q03 Where do you do most of your household's small scale 'top-up' food shopping ? (i.e. to buy bread, milk, etc, on a day-to-day basis)
Those who do top-up shopping, but not on the internet at Q03

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Tesco Extra, Brookfield Centre, Cheshunt, EN8 0TA	5.5%	55	3.5%	2	19.8%	8	16.7%	11	23.5%	24	2.7%	1	0.0%	0	2.4%	4	1.1%	2	1.3%	1	1.6%	0	1.1%	1	0.0%	0
J Sainsbury, Brewery Road, Hoddesdon, EN11 8HF	5.0%	50	40.7%	26	24.7%	11	0.0%	0	0.0%	0	13.7%	5	0.0%	0	0.0%	0	2.2%	4	0.0%	0	1.6%	0	0.0%	0	6.2%	4
Enfield (Local Stores)	4.3%	43	0.0%	0	0.0%	0	1.2%	1	1.2%	1	0.0%	0	0.0%	0	15.9%	23	8.8%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Savoy Parade, Enfield, EN1 1RT	3.8%	38	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.2%	18	9.9%	20	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Tesco, Ware Road, Hertford, SG14 1QA	3.6%	36	4.7%	3	3.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.2%	4	8.0%	8	30.9%	19
Other	3.6%	36	1.2%	1	3.7%	2	7.1%	5	2.4%	2	15.1%	5	3.5%	4	0.0%	0	3.3%	7	2.7%	1	6.3%	2	5.7%	6	3.7%	2
Tesco, 5-6 West Street, Ware, SG12 9EE	3.6%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	2	23.0%	24	16.0%	10
Tesco, Sewardstone Road, Waltham Abbey, EN9 1JH	3.6%	36	0.0%	0	0.0%	0	0.0%	0	1.2%	1	2.7%	1	30.2%	32	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, 64-66 Turners Hill, Cheshunt, EN8 8LQ	3.4%	34	1.2%	1	2.5%	1	7.1%	5	25.9%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Co-Op Supermarket, 654-674 Hertford Road, Enfield, EN3 6LZ	2.9%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.1%	25	1.1%	2	1.3%	1	1.6%	0	1.1%	1	0.0%	0
J Sainsbury, 3 Crown Road, Enfield, EN1 1AJ	2.7%	27	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	1.2%	1	3.7%	5	9.9%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, 288 High Street, Enfield, EN3 4DP	2.2%	22	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	1.2%	1	7.3%	11	4.4%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Palace Gardens Shopping Precinct, Enfield, EN2 6SN	2.1%	21	0.0%	0	1.2%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.9%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0
J Sainsbury, 72 Shopping Pavillion, Waltham Cross, EN8 7BZ	2.1%	21	0.0%	0	1.2%	1	1.2%	1	14.1%	14	0.0%	0	1.2%	1	2.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Bircherley Green Shopping Centre, Hertford, SG14 1BH	2.0%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.9%	6	8.0%	8	9.9%	6
Hoddesdon (Local Stores)	1.7%	17	18.6%	12	1.2%	1	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	2.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op, Bengeo Street, Hertford	1.7%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.1%	17	0.0%	0
Tesco, Mutton Lane, Potters Bar	1.6%	16	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	2.4%	4	1.1%	2	18.7%	8	3.1%	1	0.0%	0	0.0%	0
Tesco Express, 439 Hertford Road, Enfield, EN3 5UT	1.6%	16	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	8.5%	12	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, 54 Shopping Precinct, Enfield, EN2 6SN	1.5%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	6.6%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hertford (Local Stores)	1.5%	15	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	6.3%	2	6.9%	7	6.2%	4

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Cheshunt (Local Stores)	1.3%	13	0.0%	0	4.9%	2	13.1%	9	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
J Sainsbury, 7 Sainsbury Centre, Potters Bar, EN6 1AZ	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	28.0%	12	3.1%	1	0.0%	0	0.0%	0
Tesco Express, 61-65 High Street, Hoddesdon, EN11 8TH	1.2%	12	9.3%	6	6.2%	3	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ware (Local Stores)	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	10.3%	11	0.0%	0
Somerfield, 9 High Street, Cheshunt, EN8 0BX	1.1%	11	0.0%	0	0.0%	0	0.0%	0	10.6%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 54-62 Island Centre Way, Enfield, EN3 6GS	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	7	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op (East & Central), 23 Station Road, Cuffley, EN6 4HX	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0	16.0%	7	0.0%	0	0.0%	0	0.0%	0
Co-Op Late Shop, 113-117 Upshire Road, Waltham Abbey, EN9 3PE	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0	8.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Southbury Road, Enfield, EN1 1TW	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	3.3%	7	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Waltham Abbey (Local Stores)	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0	7.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Brookfield Centre, Cheshunt, EN8 0NS	0.8%	8	1.2%	1	3.7%	2	2.4%	2	0.0%	0	0.0%	0	3.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op Supermarket, 7-9 Sun Street, Waltham Abbey, EN9 1ER	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Somerfield, Station Road, Chingford	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 3 Bullsmoor Lane, Waltham Cross, EN8 7RS	0.7%	7	0.0%	0	1.2%	1	0.0%	0	2.4%	2	0.0%	0	0.0%	0	2.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Tesco Express, Hammondstreet Road, Cheshunt	0.7%	7	0.0%	0	0.0%	0	8.3%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0
Co-Op Late Shop, 102 Lancaster Road, Enfield, EN2 0JW	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
J Sainsbury, Green Lanes, Winchmore Hill	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chingford (Local Stores)	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	6	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0
Waltham Cross (Local Stores)	0.6%	6	0.0%	0	1.2%	1	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Co-Op Late Shop, 1/13 Station Road, Chingford,	0.6%	6	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	4.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
E4 7BJ																										
Co-Op Late Shop, 136-138 Church Lane, Cheshunt, EN8 0EA	0.5%	5	0.0%	0	0.0%	0	2.4%	2	3.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Budgens, 70 Lancaster Road, Enfield, EN2 0BX	0.5%	5	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Simply Food, 140-144 Fore Street, Hertford, SG14 1AJ	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.4%	2	0.0%	0	3.7%	2
Potters Bar (Local Stores)	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	5.3%	2	0.0%	0	0.0%	0	0.0%	0
Cuffley (Local Stores)	0.4%	4	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	3	0.0%	0	0.0%	0	0.0%	0
Harlow (Local Stores)	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Hammond Court, Waltham Cross, EN7 6PJ	0.4%	4	0.0%	0	0.0%	0	6.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op Late Shop, 120A Lavender Hill, Enfield, EN2 0QU	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Welcome (East & Central), 66 Stanstead Road, Hoddesdon, EN11 0RL	0.4%	4	5.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, High Street, Loughton	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op, Fleming Crescent, Hertford	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	4	0.0%	0
Watton-at-Stone (Local Stores)	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	4	0.0%	0
Netto, The Tower Centre, Hoddesdon, EN11 8UD	0.3%	3	1.2%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	1.2%	1
Wormley (Local Stores)	0.3%	3	0.0%	0	7.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
J Sainsbury, Allende Avenue, Harlow	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Co-Op, High Street, Stanstead Abbots	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	3
Iceland, Brocket Road, Hoddesdon, EN11 8PE	0.3%	3	1.2%	1	1.2%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Tesco, Edinburgh Way, Harlow	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	2
J Sainsbury, Old Station Road, Loughton, IG10 4PL	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Watergardens, Harlow	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Budgens, Hammondstreet Road, Cheshunt	0.2%	2	0.0%	0	0.0%	0	3.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, 106-108 High Street, Waltham Cross, EN8 7BX	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Co-Op Late Shop, 3-5 Leighton Road, Enfield, EN1 1XH	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Budgens, 38/40 Windmill Hill, Enfield, EN2 7AW	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broxbourne High Road (Local Stores)	0.2%	2	0.0%	0	4.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheshunt Wash (Local Stores)	0.2%	2	0.0%	0	0.0%	0	1.2%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Welwyn Garden City (Local Stores)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	1.2%	1
Netto, 49 High Street, Enfield, EN3 6SL	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hatfield (Local Stores)	0.2%	2	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	1	0.0%	0	0.0%	0
Roydon (Local Stores)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ware Road (Local Stores)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
One Stop, 66-70 High Street, Cheshunt, EN8 0AH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op (East & Central), 37 High Road, Broxbourne, EN10 7HX	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Great North Way, Hatfield, AL9 5JY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	1	0.0%	0	0.0%	0
Goffs Oak (Local Stores)	0.1%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	12.6%	126	11.6%	7	8.6%	4	16.7%	11	5.9%	6	26.0%	9	11.6%	12	13.4%	20	17.6%	35	10.7%	4	12.5%	3	8.0%	8	8.6%	5
Weighted base:		998		64		43		68		102		35		105		146		201		41		26		105		61
Sample:		975		86		81		84		85		73		86		82		91		75		64		87		81

Broxbourne Shopping Survey for GVA Grimley

Q04 In which town centre, freestanding store or retail park do you do most of your household's shopping for clothing, footwear and other fashion goods?
Those who buy clothing, footwear & other fashion goods at Q04, but who do not have it delivered or buy abroad

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Enfield	20.6%	225	1.0%	1	0.0%	0	7.7%	6	3.2%	4	0.0%	0	6.4%	7	47.8%	77	63.3%	126	9.2%	4	0.0%	0	0.0%	0	1.1%	1
Brookfield (Marks & Spencer, Tesco Extra, Clintons, River Island, New Look, Outfit, JD Sports, Clarks, Next, Boots, Argos)	16.1%	175	28.1%	20	34.0%	17	31.9%	23	34.7%	40	12.2%	5	10.6%	12	6.7%	11	2.2%	4	11.5%	6	10.1%	3	15.8%	18	22.3%	16
Harlow	14.3%	156	39.6%	28	17.0%	8	6.6%	5	11.6%	13	57.8%	25	24.5%	28	4.4%	7	3.3%	7	1.2%	1	6.3%	2	13.7%	16	22.3%	16
Welwyn Garden City	5.0%	55	2.1%	1	4.3%	2	8.8%	6	1.1%	1	3.3%	1	0.0%	0	0.0%	0	0.0%	0	16.1%	8	25.3%	8	13.7%	16	14.9%	11
London (West End)	5.0%	55	2.1%	1	7.4%	4	2.2%	2	0.0%	0	2.2%	1	7.4%	9	8.9%	14	4.4%	9	10.3%	5	8.9%	3	3.2%	4	5.3%	4
Cheshunt	4.9%	54	3.1%	2	8.5%	4	11.0%	8	10.5%	12	1.1%	0	6.4%	7	5.6%	9	2.2%	4	1.2%	1	1.3%	0	3.2%	4	2.1%	2
Waltham Cross	2.9%	31	1.0%	1	2.1%	1	4.4%	3	10.5%	12	0.0%	0	6.4%	7	1.1%	2	2.2%	4	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Lakeside Shopping Centre, Thurrock	2.8%	31	1.0%	1	3.2%	2	8.8%	6	4.2%	5	7.8%	3	9.6%	11	1.1%	2	0.0%	0	0.0%	0	1.3%	0	0.0%	0	1.1%	1
Stevenage	2.6%	28	1.0%	1	0.0%	0	0.0%	0	1.1%	1	1.1%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2	11.4%	4	17.9%	21	0.0%	0
Other	2.2%	24	0.0%	0	2.1%	1	1.1%	1	0.0%	0	1.1%	0	5.3%	6	6.7%	11	0.0%	0	3.4%	2	3.8%	1	2.1%	2	0.0%	0
Hertford	1.6%	17	2.1%	1	1.1%	1	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.6%	2	6.3%	7	4.3%	3
Hatfield	1.5%	17	0.0%	0	1.1%	1	1.1%	1	1.1%	1	0.0%	0	0.0%	0	1.1%	2	1.1%	2	1.2%	1	5.1%	2	6.3%	7	1.1%	1
Bluewater Shopping Centre, Kent	1.2%	13	1.0%	1	3.2%	2	1.1%	1	0.0%	0	2.2%	1	1.1%	1	0.0%	0	2.2%	4	0.0%	0	1.3%	0	1.1%	1	2.1%	2
Watford	0.8%	9	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	2.2%	4	2.3%	1	0.0%	0	0.0%	0	1.1%	1
Enfield Retail Park, Enfield (Homebase, Comet, Halfords, Sportsworld, JJB Sports, Currys, Toys R Us)	0.7%	8	0.0%	0	2.1%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	2.2%	4	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Albans	0.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	9.2%	4	1.3%	0	0.0%	0	0.0%	0
Hoddesdon	0.6%	7	2.1%	1	0.0%	0	1.1%	1	0.0%	0	3.3%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	1.1%	1	2.1%	2
Romford	0.4%	4	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	3.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London Colney	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.2%	4	0.0%	0	0.0%	0	0.0%	0
Ilford	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chingford	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Madford Retail Park, Hertford (Focus, Matalan)	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1	1.1%	1	1.1%	1
Barnet	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	2	0.0%	0	0.0%	0	0.0%	0
Matalan, Brimsdown	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ponders End (Brantano, Poundstretcher)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Loughton	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ware	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Epping	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Potters Bar	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0
Brent Cross	0.1%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies / no pattern)	13.6%	148	15.6%	11	11.7%	6	12.1%	9	20.0%	23	6.7%	3	12.8%	15	12.2%	20	12.2%	24	12.6%	6	13.9%	4	12.6%	15	18.1%	13

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Weighted base:		1092		71		50		73		114		44		115		160		199		48		32		115		71
Sample:		1095		96		94		91		95		90		94		90		90		87		79		95		94

Q05 How does your household normally travel to its main clothing and footwear shopping destination (LOCATION MENTIONED AT Q04)?

Those who buy clothing, footwear & other fashion goods at Q04, but who do not have it delivered or buy abroad

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Car / van (as driver)	57.1%	539	65.4%	39	71.1%	31	75.0%	48	48.7%	45	71.4%	29	53.7%	54	51.9%	73	30.4%	53	67.1%	28	72.1%	20	73.5%	74	76.6%	44
Car / van (as passenger)	13.7%	130	21.0%	13	12.0%	5	10.0%	6	19.7%	18	10.7%	4	19.5%	20	19.0%	27	10.1%	18	10.5%	4	11.8%	3	6.0%	6	9.1%	5
Bus	12.7%	119	7.4%	4	3.6%	2	6.3%	4	11.8%	11	7.1%	3	14.6%	15	17.7%	25	24.1%	42	9.2%	4	1.5%	0	6.0%	6	6.5%	4
Motorcycle	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	8.1%	77	1.2%	1	2.4%	1	2.5%	2	13.2%	12	4.8%	2	3.7%	4	2.5%	4	25.3%	44	0.0%	0	4.4%	1	6.0%	6	1.3%	1
Taxi	0.4%	4	2.5%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0
Train	4.2%	40	2.5%	1	7.2%	3	2.5%	2	1.3%	1	0.0%	0	4.9%	5	5.1%	7	3.8%	7	9.2%	4	7.4%	2	4.8%	5	5.2%	3
Bicycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't travel / goods delivered)	0.1%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	3.5%	33	0.0%	0	3.6%	2	2.5%	2	3.9%	4	4.8%	2	2.4%	2	3.8%	5	6.3%	11	1.3%	1	2.9%	1	3.6%	4	1.3%	1
Weighted base:		944		60		44		64		92		41		100		141		174		42		28		101		58
Sample:		948		81		83		80		76		84		82		79		79		76		68		83		77

Q06 What do you like about (LOCATION MENTIONED AT Q04) ?

Those who buy clothing, footwear & other fashion goods at Q04, but who do not have it delivered or buy abroad

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Good range of chain / well known stores	47.9%	453	59.3%	36	55.4%	24	41.3%	27	46.1%	42	38.1%	15	58.5%	59	40.5%	57	41.8%	73	52.6%	22	57.4%	16	59.0%	59	39.0%	23
Close to home	30.9%	291	23.5%	14	37.3%	16	40.0%	26	31.6%	29	47.6%	19	19.5%	20	31.6%	45	45.6%	79	17.1%	7	25.0%	7	15.7%	16	23.4%	14
Good range of independent stores	21.9%	207	28.4%	17	27.7%	12	21.3%	14	28.9%	26	16.7%	7	31.7%	32	13.9%	20	13.9%	24	23.7%	10	25.0%	7	27.7%	28	18.2%	11
Good and / or free car parking	8.2%	77	8.6%	5	20.5%	9	8.8%	6	3.9%	4	6.0%	2	8.5%	9	11.4%	16	3.8%	7	6.6%	3	5.9%	2	9.6%	10	10.4%	6
Attractive environment	6.5%	62	1.2%	1	1.2%	1	1.3%	1	5.3%	5	1.2%	0	9.8%	10	3.8%	5	15.2%	26	6.6%	3	4.4%	1	7.2%	7	2.6%	2
Nothing / very little	6.0%	57	9.9%	6	3.6%	2	1.3%	1	6.6%	6	9.5%	4	6.1%	6	10.1%	14	3.8%	7	6.6%	3	4.4%	1	6.0%	6	2.6%	2
Indoor shopping malls / arcades	3.7%	35	2.5%	1	9.6%	4	5.0%	3	5.3%	5	1.2%	0	7.3%	7	1.3%	2	0.0%	0	3.9%	2	5.9%	2	7.2%	7	1.3%	1
Everything in one place	2.5%	24	2.5%	1	2.4%	1	5.0%	3	6.6%	6	1.2%	0	2.4%	2	1.3%	2	1.3%	2	2.6%	1	4.4%	1	0.0%	0	5.2%	3
Easily accessible by foot / cycle	2.5%	24	0.0%	0	1.2%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	3.8%	5	5.1%	9	6.6%	3	1.5%	0	3.6%	4	2.6%	2
Good bus service / accessible public transport	2.2%	20	2.5%	1	1.2%	1	2.5%	2	0.0%	0	0.0%	0	1.2%	1	3.8%	5	3.8%	7	3.9%	2	0.0%	0	1.2%	1	1.3%	1
Good prices	1.8%	17	0.0%	0	3.6%	2	1.3%	1	1.3%	1	0.0%	0	1.2%	1	1.3%	2	3.8%	7	1.3%	1	1.5%	0	1.2%	1	2.6%	2
Markets	1.7%	16	1.2%	1	2.4%	1	1.3%	1	0.0%	0	1.2%	0	0.0%	0	5.1%	7	2.5%	4	3.9%	2	0.0%	0	0.0%	0	0.0%	0
Close to work / en route to work	1.7%	16	0.0%	0	2.4%	1	2.5%	2	1.3%	1	1.2%	0	1.2%	1	1.3%	2	2.5%	4	1.3%	1	2.9%	1	1.2%	1	2.6%	2
Cleanliness	1.6%	15	0.0%	0	1.2%	1	1.3%	1	2.6%	2	1.2%	0	2.4%	2	1.3%	2	1.3%	2	0.0%	0	2.9%	1	3.6%	4	0.0%	0
Restaurant / cafés	1.5%	14	0.0%	0	3.6%	2	2.5%	2	0.0%	0	1.2%	0	1.2%	1	2.5%	4	0.0%	0	1.3%	1	2.9%	1	3.6%	4	1.3%	1
Other	1.5%	14	0.0%	0	1.2%	1	1.3%	1	1.3%	1	0.0%	0	1.2%	1	1.3%	2	1.3%	2	1.3%	1	1.5%	0	2.4%	2	5.2%	3
Generally convenient	1.3%	12	0.0%	0	1.2%	1	0.0%	0	3.9%	4	0.0%	0	2.4%	2	0.0%	0	2.5%	4	0.0%	0	1.5%	0	0.0%	0	1.3%	1
Small / compact	1.2%	12	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0	1.2%	1	1.3%	2	1.3%	2	1.3%	1	2.9%	1	1.2%	1	3.9%	2
Habit / familiar	1.2%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	1.2%	1	1.3%	2	3.8%	7	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Safe and secure	1.1%	11	0.0%	0	1.2%	1	1.3%	1	2.6%	2	0.0%	0	1.2%	1	0.0%	0	1.3%	2	0.0%	0	1.5%	0	2.4%	2	1.3%	1
John Lewis	0.8%	8	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	3.6%	4	3.9%	2
Marks & Spencer	0.7%	7	0.0%	0	0.0%	0	1.3%	1	1.3%	1	0.0%	0	1.2%	1	2.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The variety of stores in general	0.6%	6	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	2.4%	2	1.3%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Bigger centre	0.5%	5	1.2%	1	0.0%	0	1.3%	1	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	2.4%	2	0.0%	0
Good park & ride	0.4%	4	0.0%	0	2.4%	1	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	2
Part of an overall day out	0.4%	4	1.2%	1	2.4%	1	1.3%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Quiet / not very busy	0.4%	4	0.0%	0	0.0%	0	1.3%	1	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Easily accessible in general	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.3%	1
I prefer the size of the centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	1.5%	0	0.0%	0	1.3%	1
Particular store	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	1.5%	0	0.0%	0	0.0%	0
(Don't know)	2.8%	26	0.0%	0	1.2%	1	3.8%	2	2.6%	2	4.8%	2	2.4%	2	1.3%	2	5.1%	9	1.3%	1	4.4%	1	2.4%	2	2.6%	2
Weighted base:		944		60		44		64		92		41		100		141		174		42		28		101		58
Sample:		948		81		83		80		76		84		82		79		79		76		68		83		77

Q07 What would make you shop in or visit (LOCATION MENTIONED AT Q04) more often ?

Those who buy clothing, footwear & other fashion goods at Q04, but who do not have it delivered or buy abroad

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
More department stores	10.0%	95	11.1%	7	4.8%	2	10.0%	6	11.8%	11	10.7%	4	7.3%	7	10.1%	14	12.7%	22	7.9%	3	10.3%	3	8.4%	8	10.4%	6
More non-food stores	7.5%	71	7.4%	4	6.0%	3	10.0%	6	2.6%	2	9.5%	4	6.1%	6	10.1%	14	6.3%	11	7.9%	3	13.2%	4	10.8%	11	2.6%	2
Easier / more parking	3.7%	35	3.7%	2	3.6%	2	6.3%	4	1.3%	1	3.6%	1	3.7%	4	3.8%	5	3.8%	7	3.9%	2	2.9%	1	3.6%	4	5.2%	3
Cheaper prices	2.5%	24	1.2%	1	0.0%	0	2.5%	2	0.0%	0	1.2%	0	2.4%	2	6.3%	9	2.5%	4	1.3%	1	2.9%	1	3.6%	4	0.0%	0
More higher order / designer stores	2.5%	24	1.2%	1	2.4%	1	1.3%	1	5.3%	5	0.0%	0	0.0%	0	5.1%	7	2.5%	4	2.6%	1	2.9%	1	1.2%	1	2.6%	2
More specialist shops	2.5%	23	3.7%	2	1.2%	1	5.0%	3	2.6%	2	3.6%	1	2.4%	2	0.0%	0	3.8%	7	1.3%	1	2.9%	1	0.0%	0	5.2%	3
Other	2.5%	23	0.0%	0	4.8%	2	3.8%	2	3.9%	4	0.0%	0	0.0%	0	3.8%	5	2.5%	4	1.3%	1	2.9%	1	2.4%	2	2.6%	2
Cheaper parking	2.4%	23	2.5%	1	2.4%	1	3.8%	2	2.6%	2	1.2%	0	1.2%	1	0.0%	0	3.8%	7	1.3%	1	2.9%	1	4.8%	5	1.3%	1
More food stores	2.0%	19	3.7%	2	1.2%	1	1.3%	1	5.3%	5	1.2%	0	0.0%	0	2.5%	4	2.5%	4	1.3%	1	1.5%	0	0.0%	0	2.6%	2
More independent shops	2.0%	18	3.7%	2	1.2%	1	1.3%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	3.8%	7	0.0%	0	5.9%	2	2.4%	2	5.2%	3
Better public transport links	1.3%	13	1.2%	1	3.6%	2	2.5%	2	3.9%	4	2.4%	1	1.2%	1	0.0%	0	0.0%	0	3.9%	2	0.0%	0	1.2%	1	0.0%	0
More places to eat / drink	1.2%	12	2.5%	1	2.4%	1	1.3%	1	2.6%	2	0.0%	0	1.2%	1	0.0%	0	1.3%	2	1.3%	1	0.0%	0	1.2%	1	1.3%	1
Improve the appearance / cleanliness	0.7%	7	0.0%	0	1.2%	1	1.3%	1	0.0%	0	1.2%	0	1.2%	1	1.3%	2	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
If it were quieter / less busy	0.7%	6	2.5%	1	0.0%	0	1.3%	1	1.3%	1	0.0%	0	1.2%	1	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More leisure facilities (e.g. cinema etc.)	0.5%	5	0.0%	0	1.2%	1	0.0%	0	1.3%	1	3.6%	1	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less traffic	0.5%	4	2.5%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More services (e.g. bank, library, hairdressers etc.)	0.4%	3	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved facilities	0.3%	3	0.0%	0	0.0%	0	1.3%	1	1.3%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More security / better personal safety	0.3%	2	0.0%	0	1.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Markets	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0
Better disabled access	0.1%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing)	62.5%	590	61.7%	37	65.1%	29	51.3%	33	56.6%	52	64.3%	26	70.7%	71	60.8%	86	64.6%	113	65.8%	28	58.8%	16	60.2%	61	68.8%	40
(Don't know)	3.7%	35	6.2%	4	4.8%	2	3.8%	2	5.3%	5	4.8%	2	2.4%	2	2.5%	4	1.3%	2	6.6%	3	4.4%	1	6.0%	6	2.6%	2
Weighted base:		944		60		44		64		92		41		100		141		174		42		28		101		58
Sample:		948		81		83		80		76		84		82		79		79		76		68		83		77

Q08 Where else do you shop for your household's clothes, footwear and other fashion goods ?
Those who buy clothing, footwear & other fashion goods at Q04, and who shop elsewhere for clothes, footwear & other fashion goods at Q08, but do not have it delivered or shop abroad

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Harlow	12.3%	94	20.3%	9	25.0%	8	16.7%	9	21.3%	16	8.5%	2	15.0%	11	6.1%	7	2.9%	4	0.0%	0	7.3%	2	21.1%	18	17.5%	8
Brookfield (Marks & Spencer, Tesco Extra, Clintons, River Island, New Look, Outfit, JD Sports, Clarks, Next, Boots, Argos)	11.7%	89	20.3%	9	12.5%	4	13.6%	7	13.1%	10	15.3%	4	18.3%	13	7.6%	9	10.0%	15	6.5%	2	10.9%	2	12.7%	11	3.5%	2
London (West End)	11.3%	86	10.2%	4	9.4%	3	7.6%	4	3.3%	2	8.5%	2	6.7%	5	16.7%	20	18.6%	29	19.4%	7	9.1%	2	5.6%	5	7.0%	3
Enfield	11.0%	84	1.7%	1	7.8%	3	9.1%	5	23.0%	17	1.7%	0	8.3%	6	24.2%	29	12.9%	20	3.2%	1	1.8%	0	2.8%	2	0.0%	0
Lakeside Shopping Centre, West Thurrock	8.1%	61	8.5%	4	6.3%	2	10.6%	6	4.9%	4	20.3%	6	16.7%	12	9.1%	11	7.1%	11	3.2%	1	1.8%	0	4.2%	4	3.5%	2
Welwyn Garden City	7.3%	56	5.1%	2	7.8%	3	7.6%	4	1.6%	1	6.8%	2	0.0%	0	0.0%	0	1.4%	2	19.4%	7	23.6%	5	25.4%	22	17.5%	8
Waltham Cross	6.8%	52	0.0%	0	1.6%	1	7.6%	4	13.1%	10	5.1%	1	8.3%	6	13.6%	16	8.6%	13	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Other	4.7%	36	3.4%	1	4.7%	2	3.0%	2	3.3%	2	3.4%	1	11.7%	9	6.1%	7	4.3%	7	1.6%	1	1.8%	0	2.8%	2	5.3%	2
Stevenage	4.5%	35	6.8%	3	1.6%	1	1.5%	1	4.9%	4	1.7%	0	0.0%	0	4.5%	5	1.4%	2	4.8%	2	10.9%	2	9.9%	8	14.0%	6
Cheshunt	3.9%	30	3.4%	1	1.6%	1	10.6%	6	1.6%	1	3.4%	1	6.7%	5	0.0%	0	5.7%	9	4.8%	2	0.0%	0	2.8%	2	5.3%	2
Hertford	3.2%	25	11.9%	5	3.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	7.3%	2	12.7%	11	8.8%	4
Bluewater Shopping Centre, Kent	2.3%	18	0.0%	0	10.9%	4	4.5%	2	1.6%	1	5.1%	1	3.3%	2	0.0%	0	1.4%	2	1.6%	1	1.8%	0	1.4%	1	5.3%	2
Wood Green	2.3%	18	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	0.0%	0	0.0%	0	10.0%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hatfield	2.3%	18	3.4%	1	1.6%	1	7.6%	4	1.6%	1	0.0%	0	0.0%	0	1.5%	2	0.0%	0	3.2%	1	9.1%	2	2.8%	2	7.0%	3
Watford	2.0%	15	3.4%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	11	3.2%	1	0.0%	0	0.0%	0	1.8%	1
Romford	1.5%	12	0.0%	0	0.0%	0	0.0%	0	1.6%	1	3.4%	1	5.0%	4	3.0%	4	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hoddesdon	1.4%	11	8.5%	4	3.1%	1	0.0%	0	3.3%	2	3.4%	1	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Brent Cross	1.4%	10	0.0%	0	6.3%	2	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	4	3.2%	1	0.0%	0	1.4%	1	1.8%	1
Wood Green Shopping City, High Road, London	1.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0	5.0%	4	3.0%	4	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Albans	1.3%	10	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	4	4.8%	2	5.5%	1	1.4%	1	1.8%	1
Essex	0.7%	6	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Hemel Hempstead	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0	1.6%	1	0.0%	0	1.4%	1	1.8%	1
Cambridge	0.5%	4	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0
Loughton	0.5%	4	0.0%	0	1.6%	1	1.5%	1	0.0%	0	1.7%	0	1.7%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
London Colney	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.1%	3	0.0%	0	0.0%	0	1.8%	1
Brentwood	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0	1.5%	2	0.0%	0	1.6%	1	1.8%	0	0.0%	0	0.0%	0
Potters Bar	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	2	0.0%	0	0.0%	0	0.0%	0
Bishop's Stortford	0.3%	2	1.7%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1
Epping	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ware	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	2
De Mandeville Retail Park, Enfield (Argos, Harveys, PC World)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waltham Abbey	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Range, Brimsdown	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Luton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Barnet	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies / no pattern)	5.9%	45	5.1%	2	6.3%	2	9.1%	5	4.9%	4	10.2%	3	5.0%	4	7.6%	9	4.3%	7	8.1%	3	10.9%	2	1.4%	1	8.8%	4
Weighted base:		764		44		34		53		73		29		74		118		154		34		22		86		43
Sample:		750		59		64		66		61		59		60		66		70		62		55		71		57

Broxbourne Shopping Survey
for GVA Grimley

Q09 Where do you do most of your households shopping for furniture, floor coverings and household textiles ?
Those who buy furniture, floor coverings and household textiles at Q09 but who do not have it delivered

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Waltham Cross	16.0%	143	8.1%	4	13.9%	6	29.3%	18	30.3%	28	13.9%	5	23.7%	22	16.9%	21	15.6%	26	4.7%	2	3.2%	1	7.3%	7	5.0%	3
Harlow	11.2%	100	33.8%	19	16.5%	7	8.0%	5	7.9%	7	45.8%	16	6.6%	6	2.8%	4	1.3%	2	0.0%	0	1.6%	0	18.3%	18	26.3%	16
Enfield	10.8%	96	2.7%	1	3.8%	2	12.0%	7	1.3%	1	5.6%	2	5.3%	5	25.4%	32	24.7%	42	4.7%	2	1.6%	0	1.2%	1	1.3%	1
Welwyn Garden City	8.5%	76	6.8%	4	11.4%	5	6.7%	4	1.3%	1	5.6%	2	0.0%	0	0.0%	0	6.5%	11	28.1%	10	29.0%	7	18.3%	18	22.5%	14
Brookfield (Marks & Spencer, Tesco Extra, Clintons, River Island, New Look, Outfit, JD Sports, Clarks, Next, Boots, Argos)	3.4%	30	5.4%	3	8.9%	4	8.0%	5	13.2%	12	0.0%	0	2.6%	2	0.0%	0	1.3%	2	1.6%	1	3.2%	1	0.0%	0	1.3%	1
London (West End)	3.0%	27	0.0%	0	3.8%	2	1.3%	1	0.0%	0	0.0%	0	7.9%	7	2.8%	4	3.9%	7	3.1%	1	0.0%	0	4.9%	5	1.3%	1
Other	2.9%	26	1.4%	1	1.3%	1	2.7%	2	0.0%	0	2.8%	1	1.3%	1	4.2%	5	5.2%	9	4.7%	2	4.8%	1	2.4%	2	2.5%	2
Enfield Retail Park, Enfield (Homebase, Comet, Halfords, Sportsworld, JJB Sports, Currys, Toys R Us)	2.9%	26	0.0%	0	0.0%	0	0.0%	0	5.3%	5	0.0%	0	1.3%	1	2.8%	4	9.1%	15	1.6%	1	1.6%	0	0.0%	0	0.0%	0
Stevenage	2.9%	26	0.0%	0	1.3%	1	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	7.8%	3	11.3%	3	13.4%	13	10.0%	6
Ikea, Glover Drive, Edmonton	2.8%	25	1.4%	1	2.5%	1	2.7%	2	3.9%	4	1.4%	0	3.9%	4	4.2%	5	1.3%	2	1.6%	1	1.6%	0	3.7%	4	2.5%	2
Coliseum Retail Park, Enfield (B&Q Warehouse)	1.1%	10	0.0%	0	0.0%	0	1.3%	1	0.0%	0	1.4%	0	1.3%	1	1.4%	2	2.6%	4	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Hertford	1.0%	9	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.9%	3	4.9%	5	0.0%	0
Hoddesdon	0.9%	8	10.8%	6	1.3%	1	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2
Bluewater Shopping Centre, Kent	0.8%	7	0.0%	0	1.3%	1	1.3%	1	0.0%	0	0.0%	0	3.9%	4	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lakeside Shopping Centre, Thurrock	0.7%	6	0.0%	0	0.0%	0	0.0%	0	1.3%	1	1.4%	0	3.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Hatfield	0.6%	6	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	1.6%	1	0.0%	0	2.4%	2	0.0%	0
Cheshunt	0.6%	6	0.0%	0	0.0%	0	0.0%	0	3.9%	4	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Edmonton	0.6%	5	1.4%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	4	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0
Potters Bar	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	6.2%	2	0.0%	0	0.0%	0	0.0%	0
Roaring Meg Retail Park, Stevenage	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	3.7%	4	0.0%	0
De Mandeville Retail Park, Enfield (Argos, Harveys, PC World)	0.4%	4	0.0%	0	1.3%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Watford	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	3.1%	1	1.6%	0	0.0%	0	0.0%	0
Queensgate Centre, Edinburgh Way, Harlow	0.4%	3	4.1%	2	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Waltham Abbey	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cork Tree Retail Park, South Chingford	0.3%	3	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chingford	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ware	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.3%	1

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Homebase, Waltham Cross	0.2%	2	0.0%	0	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Matalan, Brimsdown	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ikea, Heron Way, West Thurrock	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brentwood	0.2%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Highbridge Retail Park, Waltham Abbey (Carpetright, Rosebys, Bensons, Harveys, MFI)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wickes, Waltham Cross	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Albans	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	1	0.0%	0	0.0%	0	0.0%	0
Oldings Corner Retail Park, Hatfield (Comet, Habitat, Homebase)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	1.6%	0	0.0%	0	0.0%	0
Madford Retail Park, Hertford (Focus, Matalan)	0.1%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies / no pattern)	24.7%	221	23.0%	13	25.3%	11	24.0%	14	28.9%	26	13.9%	5	30.3%	28	32.4%	41	23.4%	40	23.4%	8	24.2%	6	17.1%	17	18.8%	11
Weighted base:		893		55		42		60		92		35		93		127		170		35		25		99		60
Sample:		888		74		79		75		76		72		76		71		77		64		62		82		80

Q10 Where do you do most of your households shopping for DIY and decorating goods ?
Those who buy DIY and decorating goods at Q10 but who do not have it delivered

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Coliseum Retail Park, Enfield (B&Q Warehouse)	15.5%	159	5.6%	4	3.5%	2	10.7%	7	7.0%	7	2.5%	1	15.9%	17	36.9%	55	29.7%	60	9.6%	4	2.8%	1	1.1%	1	0.0%	0
Enfield Retail Park, Enfield (Homebase, Comet, Halfords, Sportsworld, JJB Sports, Currys, Toys R Us)	13.1%	134	1.1%	1	3.5%	2	2.4%	2	8.1%	8	3.8%	1	3.4%	4	25.0%	37	38.5%	77	2.4%	1	1.4%	0	0.0%	0	0.0%	0
Harlow	11.1%	114	38.2%	25	28.2%	13	4.8%	3	2.3%	2	45.6%	17	1.1%	1	0.0%	0	2.2%	4	0.0%	0	2.8%	1	18.2%	19	42.4%	27
Waltham Cross	9.6%	99	5.6%	4	14.1%	6	33.3%	23	32.6%	34	3.8%	1	18.2%	20	3.6%	5	1.1%	2	8.4%	4	0.0%	0	0.0%	0	0.0%	0
Homebase, Waltham Cross	7.1%	73	1.1%	1	8.2%	4	25.0%	17	20.9%	22	3.8%	1	18.2%	20	1.2%	2	0.0%	0	9.6%	4	0.0%	0	1.1%	1	2.4%	2
Enfield	6.3%	65	0.0%	0	2.4%	1	7.1%	5	3.5%	4	0.0%	0	2.3%	2	15.5%	23	12.1%	24	9.6%	4	0.0%	0	1.1%	1	0.0%	0
Hertford	6.3%	65	7.9%	5	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	1.2%	1	25.4%	7	31.8%	34	23.5%	15
Other	2.2%	22	0.0%	0	1.2%	1	1.2%	1	0.0%	0	0.0%	0	6.8%	7	3.6%	5	0.0%	0	8.4%	4	4.2%	1	2.3%	2	1.2%	1
Wickes, Waltham Cross	2.0%	20	0.0%	0	2.4%	1	3.6%	2	8.1%	8	1.3%	0	3.4%	4	1.2%	2	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Madford Retail Park, Hertford (Focus, Matalan)	1.8%	19	1.1%	1	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.8%	8	5.7%	6	4.7%	3
Stevenage	1.7%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	2	11.4%	12	5.9%	4
B&Q, The Oaks Retail Park, Howard Way, Harlow	1.3%	13	13.5%	9	0.0%	0	0.0%	0	0.0%	0	8.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Cheshunt	1.1%	11	0.0%	0	4.7%	2	4.8%	3	2.3%	2	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Hatfield	1.1%	11	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.8%	5	4.2%	1	2.3%	2	2.4%	2
Harlow Retail Park, Edinburgh Way, Harlow	1.0%	10	1.1%	1	2.4%	1	0.0%	0	1.2%	1	13.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0	1.1%	1	0.0%	0
Welwyn Garden City	0.9%	9	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	2	7.0%	2	3.4%	4	1.2%	1
Hoddesdon	0.7%	7	4.5%	3	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	2.4%	2
B&Q, Dearsley Road, Enfield	0.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Oldings Corner Retail Park, Hatfield (Comet, Habitat, Homebase)	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	2	5.6%	2	2.3%	2	0.0%	0
B&Q, Deacon Industrial Estate, Chingford	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Queensgate Centre, Edinburgh Way, Harlow	0.6%	6	5.6%	4	2.4%	1	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0
Roaring Meg Retail Park, Stevenage	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	4.5%	5	0.0%	0
Focus, Highams Park Industrial Estate, Chingford	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
De Mandeville Retail Park, Enfield (Argos, Harveys, PC World)	0.4%	5	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Loughton	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chingford	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Potters Bar	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.2%	3	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Brookfield (Marks & Spencer, Tesco Extra, Clintons, River Island, New Look, Outfit, JD Sports, Clarks, Next, Boots, Argos)	0.3%	3	0.0%	0	2.4%	1	1.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Albans	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	2	1.4%	0	0.0%	0	0.0%	0
Ware	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0	1.1%	1	1.2%	1
Ponders End (Brantano, Poundstretcher)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waltham Abbey	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Barnet	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0
Watford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Cuffley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies / no pattern)	10.9%	112	13.5%	9	16.5%	7	6.0%	4	12.8%	13	13.9%	5	10.2%	11	10.7%	16	9.9%	20	13.3%	6	8.5%	2	10.2%	11	10.6%	7
Weighted base:		1024		66		45		68		104		38		108		150		201		46		29		107		64
Sample:		1013		89		85		84		86		79		88		84		91		83		71		88		85

Q11 Where do you do most of your households shopping for domestic appliances such as washing machines, fridges cookers and kettles ?
Those who buy domestic appliances such as washing machines, fridges cookers and kettles at Q11 but who do not have it delivered

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Enfield Retail Park, Enfield (Homebase, Comet, Halfords, Sportsworld, JJB Sports, Currys, Toys R Us)	22.6%	214	2.5%	1	8.5%	4	30.3%	18	25.0%	24	2.4%	1	20.5%	20	35.4%	50	52.6%	90	9.4%	4	0.0%	0	0.0%	0	1.3%	1
Harlow	12.8%	121	45.6%	27	29.3%	13	5.3%	3	5.0%	5	53.0%	21	5.1%	5	1.3%	2	1.3%	2	0.0%	0	0.0%	0	20.7%	22	36.3%	22
Enfield	11.9%	112	1.3%	1	3.7%	2	18.4%	11	15.0%	14	1.2%	0	5.1%	5	29.1%	41	19.2%	33	7.1%	3	3.3%	1	0.0%	0	1.3%	1
Welwyn Garden City	9.5%	90	10.1%	6	15.9%	7	13.2%	8	3.8%	4	4.8%	2	2.6%	2	0.0%	0	5.1%	9	29.4%	14	34.4%	9	13.8%	15	25.0%	15
Hertford	3.1%	30	2.5%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	4	0.0%	0	0.0%	0	23.0%	6	11.5%	12	10.0%	6
Other	3.1%	29	1.3%	1	2.4%	1	1.3%	1	3.8%	4	1.2%	0	12.8%	12	2.5%	4	0.0%	0	5.9%	3	1.6%	0	1.1%	1	3.8%	2
Waltham Cross	3.0%	28	0.0%	0	2.4%	1	7.9%	5	15.0%	14	0.0%	0	5.1%	5	1.3%	2	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0
Queensgate Centre, Edinburgh Way, Harlow	2.2%	21	7.6%	4	2.4%	1	0.0%	0	1.3%	1	19.3%	8	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	4	0.0%	0
Hoddesdon	2.1%	19	13.9%	8	6.1%	3	1.3%	1	0.0%	0	1.2%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	1.6%	0	3.4%	4	2.5%	2
Stevenage	1.8%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.6%	0	13.8%	15	2.5%	2
Brookfield (Marks & Spencer, Tesco Extra, Clintons, River Island, New Look, Outfit, JD Sports, Clarks, Next, Boots, Argos)	1.8%	17	1.3%	1	9.8%	4	1.3%	1	3.8%	4	1.2%	0	1.3%	1	0.0%	0	1.3%	2	3.5%	2	1.6%	0	0.0%	0	2.5%	2
Coliseum Retail Park, Enfield (B&Q Warehouse)	1.5%	15	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	6.3%	9	2.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waltham Abbey	1.4%	13	0.0%	0	0.0%	0	0.0%	0	3.8%	4	2.4%	1	9.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hatfield	1.2%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	2	3.3%	1	4.6%	5	5.0%	3
Cork Tree Way Retail Park, Chingford	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London (West End)	1.0%	9	0.0%	0	1.2%	1	1.3%	1	0.0%	0	0.0%	0	2.6%	2	1.3%	2	1.3%	2	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Roaring Meg Retail Park, Stevenage	0.9%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.6%	0	6.9%	7	0.0%	0
Cheshunt	0.8%	8	0.0%	0	3.7%	2	2.6%	2	5.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
De Mandeville Retail Park, Enfield (Argos, Harveys, PC World)	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	2.6%	4	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Potters Bar	0.6%	6	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.6%	5	0.0%	0	0.0%	0	0.0%	0
Chingford	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	4	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Oaks Retail Park, Howard Way, Harlow	0.5%	5	2.5%	1	1.2%	1	1.3%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	3.3%	1	0.0%	0	0.0%	0
Oldings Corner Retail Park, Hatfield (Comet, Habitat, Homebase)	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	2	4.9%	1	1.1%	1	0.0%	0
Harlow Retail Park, Edinburgh Way, Harlow	0.4%	4	1.3%	1	1.2%	1	0.0%	0	1.3%	1	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Wickes, Waltham Cross	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Watford	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	1.2%	1	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Ware	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0
Chigwell	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comet, Monkswood Retail Park, Stevenage	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.6%	0	1.1%	1	0.0%	0
St Albans	0.2%	2	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0
Loughton	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ponders End (Brantano, Poundstretcher)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brentwood	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Barnet	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	2	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies / no pattern)	12.8%	121	10.1%	6	12.2%	5	11.8%	7	16.3%	16	10.8%	4	15.4%	15	12.7%	18	11.5%	20	9.4%	4	18.0%	4	14.9%	16	8.8%	5
Weighted base:		945		58		43		61		96		40		96		141		172		47		25		105		60
Sample:		948		79		82		76		80		83		78		79		78		85		61		87		80

Q12 Where do you do most of your households shopping for TV, Hi-Fi, Radio, photographic and computer equipment ?

Those who buy TV, Hi-Fi, Radio, photographic and computer equipment at Q12 but who do not have it delivered or buy abroad

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Enfield Retail Park, Enfield (Homebase, Comet, Halfords, Sportsworld, JJB Sports, Currys, Toys R Us)	19.7%	175	2.8%	1	8.5%	4	19.2%	11	17.1%	16	3.8%	1	16.4%	15	34.8%	43	46.8%	79	8.7%	3	1.7%	0	0.0%	0	1.2%	1
Harlow	13.6%	121	42.3%	22	23.2%	10	4.1%	2	3.9%	4	46.2%	17	11.0%	10	1.5%	2	2.6%	4	0.0%	0	3.4%	1	24.4%	24	39.5%	24
Enfield	12.6%	112	2.8%	1	3.7%	2	17.8%	10	13.2%	12	1.3%	0	4.1%	4	27.5%	34	24.7%	42	8.7%	3	1.7%	0	1.2%	1	2.5%	2
Welwyn Garden City	8.7%	78	12.7%	7	13.4%	6	13.7%	8	2.6%	2	5.1%	2	2.7%	2	0.0%	0	2.6%	4	23.2%	9	31.0%	7	17.1%	17	21.0%	13
Other	3.9%	35	1.4%	1	6.1%	3	1.4%	1	3.9%	4	0.0%	0	13.7%	12	4.3%	5	1.3%	2	5.8%	2	1.7%	0	3.7%	4	1.2%	1
Brookfield (Marks & Spencer, Tesco Extra, Clintons, River Island, New Look, Outfit, JD Sports, Clarks, Next, Boots, Argos)	2.7%	24	1.4%	1	9.8%	4	5.5%	3	7.9%	7	2.6%	1	1.4%	1	1.5%	2	1.3%	2	1.5%	1	1.7%	0	0.0%	0	2.5%	2
Stevenage	2.7%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	8.6%	2	18.3%	18	3.7%	2
Queensgate Centre, Edinburgh Way, Harlow	2.5%	22	5.6%	3	3.7%	2	0.0%	0	1.3%	1	16.7%	6	4.1%	4	0.0%	0	1.3%	2	0.0%	0	0.0%	0	3.7%	4	1.2%	1
Waltham Cross	2.4%	21	0.0%	0	1.2%	1	4.1%	2	15.8%	14	0.0%	0	4.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hertford	1.9%	16	1.4%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	4	0.0%	0	0.0%	0	17.2%	4	6.1%	6	2.5%	2
Hoddesdon	1.6%	14	15.5%	8	2.4%	1	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2	2.5%	2
De Mandeville Retail Park, Enfield (Argos, Harveys, PC World)	1.5%	13	0.0%	0	0.0%	0	1.4%	1	2.6%	2	1.3%	0	1.4%	1	2.9%	4	2.6%	4	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Waltham Abbey	1.5%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	2	12.3%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coliseum Retail Park, Enfield (B&Q Warehouse)	1.4%	12	0.0%	0	0.0%	0	1.4%	1	2.6%	2	0.0%	0	0.0%	0	7.2%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hatfield	1.3%	11	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	2	5.2%	1	3.7%	4	6.2%	4
Harlow Retail Park, Edinburgh Way, Harlow	1.2%	10	4.2%	2	2.4%	1	1.4%	1	1.3%	1	2.6%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	3.4%	1	1.2%	1	1.2%	1
Cheshunt	0.8%	7	0.0%	0	1.2%	1	6.9%	4	2.6%	2	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cork Tree Way Retail Park, Chingford	0.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.2%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Watford	0.8%	7	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	4	2.9%	1	0.0%	0	0.0%	0	1.2%	1
London (West End)	0.8%	7	0.0%	0	2.4%	1	2.7%	2	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0	1.2%	1
Roaring Meg Retail Park, Stevenage	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	1.7%	0	3.7%	4	0.0%	0
Chingford	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Potters Bar	0.4%	4	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.2%	3	0.0%	0	0.0%	0	0.0%	0
St Albans	0.4%	3	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	2	0.0%	0	0.0%	0	0.0%	0
Oldings Corner Retail Park, Hatfield (Comet, Habitat, Homebase)	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	2	3.4%	1	0.0%	0	0.0%	0
Ponders End (Brantano, Poundstretcher)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Loughton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ware	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Brentwood	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0	0.0%	0
Barnet	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies / no pattern)	15.1%	134	9.9%	5	19.5%	8	15.1%	9	25.0%	23	11.5%	4	11.0%	10	15.9%	20	14.3%	24	13.0%	5	19.0%	4	13.4%	13	12.3%	8
Weighted base:		888		53		43		59		92		38		89		123		170		38		24		99		61
Sample:		889		71		82		73		76		78		73		69		77		69		58		82		81

Q13 Where do you do most of your households shopping on personal / luxury goods including books, jewellery, china, glass and cosmetics ?
Those who buy personal / luxury goods including books, jewellery, china, glass and cosmetics at Q13 but who do not have it delivered or buy abroad

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Enfield	19.2%	173	0.0%	0	1.2%	1	7.7%	5	4.3%	4	1.4%	0	3.6%	4	50.0%	57	54.3%	97	6.7%	3	3.2%	1	1.2%	1	1.2%	1
Harlow	7.6%	69	22.4%	11	7.3%	3	7.7%	5	2.9%	2	47.3%	17	10.8%	11	0.0%	0	1.2%	2	0.0%	0	0.0%	0	7.2%	7	15.1%	10
Welwyn Garden City	7.2%	65	7.5%	4	6.1%	3	11.5%	7	0.0%	0	6.8%	2	1.2%	1	0.0%	0	2.5%	4	24.0%	10	22.2%	6	15.7%	16	18.6%	12
Waltham Cross	5.8%	52	0.0%	0	1.2%	1	9.0%	6	21.7%	18	1.4%	0	13.3%	13	6.3%	7	3.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hertford	5.7%	51	4.5%	2	1.2%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	34.9%	9	22.9%	23	23.3%	15
London (West End)	5.1%	46	6.0%	3	9.8%	4	3.8%	2	1.4%	1	6.8%	2	8.4%	9	1.6%	2	6.2%	11	5.3%	2	6.3%	2	3.6%	4	5.8%	4
Brookfield (Marks & Spencer, Tesco Extra, Clintons, River Island, New Look, Outfit, JD Sports, Clarks, Next, Boots, Argos)	5.0%	45	4.5%	2	12.2%	5	19.2%	12	17.4%	14	2.7%	1	3.6%	4	0.0%	0	1.2%	2	2.7%	1	0.0%	0	1.2%	1	3.5%	2
Other	3.0%	27	0.0%	0	0.0%	0	0.0%	0	7.2%	6	0.0%	0	6.0%	6	6.3%	7	1.2%	2	2.7%	1	0.0%	0	1.2%	1	4.7%	3
Hoddesdon	2.9%	26	23.9%	12	14.6%	6	2.6%	2	0.0%	0	4.1%	1	1.2%	1	0.0%	0	1.2%	2	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Lakeside Shopping Centre, West Thurrock	2.7%	24	3.0%	1	1.2%	1	6.4%	4	2.9%	2	6.8%	2	8.4%	9	1.6%	2	1.2%	2	0.0%	0	3.2%	1	0.0%	0	0.0%	0
Cheshunt	2.0%	18	0.0%	0	6.1%	3	7.7%	5	8.7%	7	0.0%	0	1.2%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	2.3%	2
Stevenage	1.4%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	3.2%	1	10.8%	11	1.2%	1
Ware	1.4%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.6%	10	4.7%	3
Hatfield	1.0%	9	1.5%	1	0.0%	0	2.6%	2	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	4.0%	2	1.6%	0	2.4%	2	0.0%	0
Potters Bar	0.9%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.0%	8	0.0%	0	0.0%	0	0.0%	0
Chingford	0.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.2%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brent Cross	0.7%	7	0.0%	0	1.2%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	3.1%	4	0.0%	0	1.3%	1	1.6%	0	0.0%	0	1.2%	1
Enfield Retail Park, Enfield (Homebase, Comet, Halfords, Sportsworld, JJB Sports, Currys, Toys R Us)	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	2.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waltham Abbey	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Watford	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	4	1.3%	1	0.0%	0	0.0%	0	1.2%	1
Bluewater Shopping Centre, Kent	0.5%	5	0.0%	0	0.0%	0	1.3%	1	0.0%	0	1.4%	0	1.2%	1	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cambridge	0.4%	4	0.0%	0	1.2%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.2%	1
Barnet	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	3	0.0%	0	0.0%	0	0.0%	0
Loughton	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London Colney	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	2	0.0%	0	0.0%	0	0.0%	0
St Albans	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0
Epping	0.2%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bishop's Stortford	0.1%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
De Mandeville Retail Park, Enfield (Argos, Harveys, PC World)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coliseum Retail Park, Enfield (B&Q Warehouse)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chelmsford	0.1%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
(Don’t know / varies / no pattern)	23.1%	208	26.9%	13	34.1%	15	17.9%	11	30.4%	25	16.2%	6	22.9%	23	28.1%	32	21.0%	38	16.0%	7	23.8%	6	21.7%	22	16.3%	11
Weighted base:		902		50		43		63		83		36		102		114		179		41		26		101		65
Sample:		905		67		82		78		69		74		83		64		81		75		63		83		86

Q14 Which of the following centres do you visit most often ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Brookfield	51.7%	626	33.3%	25	73.5%	40	75.5%	62	59.8%	73	47.1%	23	45.1%	56	33.3%	61	49.5%	113	47.1%	27	55.2%	20	64.7%	80	60.8%	47
Waltham Cross	15.2%	185	1.0%	1	1.0%	1	8.8%	7	18.6%	23	4.9%	2	26.5%	33	41.2%	75	17.5%	40	2.0%	1	0.0%	0	1.0%	1	1.0%	1
Hoddesdon	8.0%	97	55.9%	42	17.6%	10	1.0%	1	0.0%	0	18.6%	9	2.9%	4	2.0%	4	1.9%	4	0.0%	0	6.9%	2	8.8%	11	13.7%	11
Cheshunt	4.6%	55	2.9%	2	5.9%	3	9.8%	8	13.7%	17	3.9%	2	3.9%	5	2.9%	5	1.9%	4	4.9%	3	2.3%	1	2.0%	2	2.9%	2
(Never visit)	18.5%	224	4.9%	4	1.0%	1	2.9%	2	2.0%	2	21.6%	11	16.7%	21	19.6%	36	28.2%	64	46.1%	26	34.5%	12	23.5%	29	21.6%	17
(Don't know / varies)	1.9%	23	2.0%	1	1.0%	1	2.0%	2	5.9%	7	3.9%	2	4.9%	6	1.0%	2	1.0%	2	0.0%	0	1.1%	0	0.0%	0	0.0%	0
Weighted base:		1210		75		54		82		123		49		125		182		227		56		35		124		77
Sample:		1210		102		102		102		102		102		102		102		103		102		87		102		102

Q15 What is the main reason for your visit to (CENTRE MENTIONED AT Q14) ?
Those who mentioned a centre at Q14

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Clothing, footwear and other fashion goods	51.8%	499	43.2%	30	34.0%	18	28.9%	23	50.0%	57	53.9%	20	51.3%	50	55.6%	80	60.3%	97	52.7%	16	53.6%	12	64.1%	61	58.8%	35
Main food shopping	42.0%	404	57.9%	41	79.0%	42	69.1%	54	67.0%	76	31.6%	12	28.8%	28	29.6%	43	27.4%	44	43.6%	13	32.1%	7	28.2%	27	30.0%	18
Top-up food shopping	18.7%	180	24.2%	17	7.0%	4	10.3%	8	19.1%	22	22.4%	8	18.8%	18	18.5%	27	20.5%	33	18.2%	6	16.1%	4	23.1%	22	20.0%	12
Personal / luxury goods including books, jewellery, china, glass and cosmetics	8.1%	78	11.6%	8	10.0%	5	11.3%	9	5.3%	6	5.3%	2	15.0%	15	9.9%	14	2.7%	4	12.7%	4	8.9%	2	5.1%	5	6.3%	4
Furniture, floor coverings and household textiles	4.5%	44	4.2%	3	2.0%	1	1.0%	1	5.3%	6	2.6%	1	11.3%	11	2.5%	4	5.5%	9	1.8%	1	3.6%	1	5.1%	5	3.8%	2
Financial services (e.g. banks, building societies)	4.4%	43	13.7%	10	2.0%	1	3.1%	2	7.4%	8	3.9%	1	3.8%	4	4.9%	7	2.7%	4	0.0%	0	0.0%	0	0.0%	0	7.5%	5
Personal services (e.g. hair salons, chemists)	1.7%	16	5.3%	4	2.0%	1	1.0%	1	2.1%	2	3.9%	1	1.3%	1	1.2%	2	1.4%	2	0.0%	0	0.0%	0	0.0%	0	2.5%	2
TV, Hi-Fi, Radio, photographic and computer equipment	1.6%	15	4.2%	3	0.0%	0	3.1%	2	1.1%	1	0.0%	0	2.5%	2	1.2%	2	1.4%	2	1.8%	1	1.8%	0	1.3%	1	0.0%	0
Domestic appliances such as washing machines, fridges cookers and kettles	1.6%	15	4.2%	3	0.0%	0	3.1%	2	2.1%	2	2.6%	1	1.3%	1	1.2%	2	1.4%	2	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Marks & Spencer	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	2.5%	2	0.0%	0	2.7%	4	0.0%	0	5.4%	1	3.8%	4	2.5%	2
DIY and decorating goods	1.4%	13	1.1%	1	1.0%	1	0.0%	0	4.3%	5	1.3%	0	3.8%	4	1.2%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Has big stores	1.3%	13	0.0%	0	0.0%	0	2.1%	2	2.1%	2	2.6%	1	0.0%	0	0.0%	0	2.7%	4	0.0%	0	0.0%	0	1.3%	1	3.8%	2
Variety / good shops	1.1%	11	0.0%	0	0.0%	0	0.0%	0	3.2%	4	0.0%	0	2.5%	2	0.0%	0	1.4%	2	0.0%	0	3.6%	1	1.3%	1	1.3%	1
Market	1.1%	10	3.2%	2	2.0%	1	1.0%	1	0.0%	0	2.6%	1	1.3%	1	1.2%	2	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Daytime eating / drinking	1.0%	10	1.1%	1	0.0%	0	0.0%	0	2.1%	2	2.6%	1	1.3%	1	2.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Other	0.7%	7	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	1	2.6%	2	3.8%	2
Browsing / window shopping	0.5%	5	0.0%	0	0.0%	0	0.0%	0	1.1%	1	1.3%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	1.8%	0	1.3%	1	1.3%	1
Recycling	0.2%	2	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Nightime eating / drinking	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	8.4%	81	7.4%	5	6.0%	3	5.2%	4	4.3%	5	10.5%	4	5.0%	5	11.1%	16	12.3%	20	3.6%	1	12.5%	3	10.3%	10	8.8%	5
Weighted base:		963		70		53		78		113		37		98		144		161		30		23		95		60
Sample:		965		95		100		97		94		76		80		81		73		55		56		78		80

Q16 How often do you visit (CENTRE MENTIONED AT Q14) ?
Those who mentioned a centre at Q14

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Everyday	4.5%	43	13.7%	10	2.0%	1	6.2%	5	14.9%	17	1.3%	0	0.0%	0	6.2%	9	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
2 – 3 times a week	15.3%	147	32.6%	23	38.0%	20	40.2%	31	28.7%	33	14.5%	5	3.8%	4	7.4%	11	6.8%	11	5.5%	2	5.4%	1	0.0%	0	11.3%	7
Once a week	23.1%	222	30.5%	21	41.0%	22	39.2%	31	36.2%	41	17.1%	6	22.5%	22	25.9%	37	5.5%	9	27.3%	8	8.9%	2	14.1%	13	15.0%	9
Once a fortnight	14.0%	134	11.6%	8	10.0%	5	10.3%	8	8.5%	10	13.2%	5	21.3%	21	13.6%	20	15.1%	24	16.4%	5	12.5%	3	15.4%	15	18.8%	11
Once a month	19.9%	191	7.4%	5	5.0%	3	3.1%	2	9.6%	11	21.1%	8	27.5%	27	24.7%	36	26.0%	42	14.5%	4	30.4%	7	33.3%	32	25.0%	15
Once every 3 months	15.4%	149	3.2%	2	0.0%	0	1.0%	1	2.1%	2	23.7%	9	18.8%	18	11.1%	16	31.5%	51	27.3%	8	28.6%	7	26.9%	25	15.0%	9
Once every 6 months	2.7%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1	1.3%	1	2.5%	4	6.8%	11	3.6%	1	10.7%	2	3.8%	4	3.8%	2
Once a year	2.1%	21	1.1%	1	0.0%	0	0.0%	0	0.0%	0	3.9%	1	1.3%	1	2.5%	4	4.1%	7	3.6%	1	1.8%	0	2.6%	2	5.0%	3
Less often	0.9%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	1.3%	1	1.2%	2	1.4%	2	0.0%	0	0.0%	0	1.3%	1	2.5%	2
(Don't know / varies)	2.2%	21	0.0%	0	4.0%	2	0.0%	0	0.0%	0	1.3%	0	2.5%	2	4.9%	7	2.7%	4	1.8%	1	1.8%	0	1.3%	1	3.8%	2
Weighted base:		963		70		53		78		113		37		98		144		161		30		23		95		60
Sample:		965		95		100		97		94		76		80		81		73		55		56		78		80

Q17 What would make you visit (CENTRE MENTIONED AT Q14) more often ?

Those who mentioned a centre at Q14

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
More non-food stores	11.8%	114	36.8%	26	17.0%	9	8.2%	6	8.5%	10	6.6%	2	12.5%	12	16.0%	23	2.7%	4	5.5%	2	5.4%	1	11.5%	11	11.3%	7
More department stores	10.6%	102	22.1%	16	22.0%	12	7.2%	6	8.5%	10	7.9%	3	8.8%	9	11.1%	16	6.8%	11	10.9%	3	10.7%	2	11.5%	11	7.5%	5
More specialist shops	4.1%	40	9.5%	7	7.0%	4	5.2%	4	1.1%	1	2.6%	1	6.3%	6	3.7%	5	5.5%	9	0.0%	0	1.8%	0	0.0%	0	3.8%	2
Easier / more parking	3.3%	32	3.2%	2	5.0%	3	6.2%	5	1.1%	1	2.6%	1	3.8%	4	1.2%	2	0.0%	0	7.3%	2	10.7%	2	6.4%	6	6.3%	4
More independent shops	3.2%	31	6.3%	4	6.0%	3	0.0%	0	0.0%	0	1.3%	0	3.8%	4	2.5%	4	5.5%	9	1.8%	1	3.6%	1	5.1%	5	1.3%	1
Better public transport links	2.1%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1	3.8%	4	2.5%	4	4.1%	7	5.5%	2	1.8%	0	2.6%	2	1.3%	1
More higher order / designer stores	1.9%	18	3.2%	2	6.0%	3	0.0%	0	1.1%	1	0.0%	0	5.0%	5	1.2%	2	0.0%	0	3.6%	1	1.8%	0	2.6%	2	1.3%	1
More places to eat / drink	1.7%	16	0.0%	0	3.0%	2	0.0%	0	5.3%	6	0.0%	0	2.5%	2	1.2%	2	0.0%	0	3.6%	1	0.0%	0	2.6%	2	1.3%	1
More food stores	1.6%	16	1.1%	1	1.0%	1	0.0%	0	0.0%	0	2.6%	1	1.3%	1	3.7%	5	2.7%	4	0.0%	0	1.8%	0	1.3%	1	1.3%	1
Cheaper prices	1.5%	15	1.1%	1	0.0%	0	2.1%	2	3.2%	4	1.3%	0	1.3%	1	2.5%	4	1.4%	2	0.0%	0	1.8%	0	0.0%	0	1.3%	1
Other	1.0%	9	1.1%	1	3.0%	2	1.0%	1	1.1%	1	0.0%	0	1.3%	1	1.2%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	1	1.3%	1
Cheaper parking	0.8%	8	1.1%	1	1.0%	1	1.0%	1	1.1%	1	1.3%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	1.8%	0	2.6%	2	1.3%	1
Less traffic / improve traffic flow	0.8%	7	0.0%	0	2.0%	1	2.1%	2	1.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	1.3%	1	0.0%	0
More leisure facilities (e.g. cinema etc.)	0.8%	7	0.0%	0	0.0%	0	1.0%	1	2.1%	2	1.3%	0	0.0%	0	2.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Markets	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved facilities	0.4%	4	1.1%	1	0.0%	0	1.0%	1	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More services (e.g. bank, library, hairdressers etc.)	0.4%	3	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More security / better personal safety	0.4%	3	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improve / increase pedestrian areas	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	1	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Improved access	0.2%	2	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	0	1.3%	1	0.0%	0
Improved range of stores	0.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Better disabled access	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing)	64.3%	619	44.2%	31	53.0%	28	64.9%	51	67.0%	76	72.4%	27	65.0%	64	60.5%	87	78.1%	126	65.5%	20	62.5%	14	59.0%	56	66.3%	40
(Don't know)	2.5%	24	5.3%	4	5.0%	3	3.1%	2	2.1%	2	3.9%	1	2.5%	2	0.0%	0	1.4%	2	1.8%	1	5.4%	1	2.6%	2	5.0%	3
Weighted base:		963		70		53		78		113		37		98		144		161		30		23		95		60
Sample:		965		95		100		97		94		76		80		81		73		55		56		78		80

Q18 Do you also ever visit either Cheshunt, Hoddesdon or Waltham Cross?

Those who shop at Brookfield at Q14

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Yes	51.6%	323	73.5%	19	84.0%	33	71.4%	44	83.6%	61	43.8%	10	56.5%	32	58.8%	36	31.4%	35	29.2%	8	20.8%	4	31.8%	25	32.3%	15
No	47.5%	298	26.5%	7	16.0%	6	27.3%	17	16.4%	12	56.3%	13	41.3%	23	38.2%	23	68.6%	77	64.6%	17	79.2%	16	68.2%	55	67.7%	32
(Don't know)	0.9%	5	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	2.2%	1	2.9%	2	0.0%	0	6.2%	2	0.0%	0	0.0%	0	0.0%	0
Weighted base:		626		25		40		62		73		23		56		61		113		27		20		80		47
Sample:		650		34		75		77		61		48		46		34		51		48		48		66		62

Broxbourne Shopping Survey for GVA Grimley

Q19 Which centre do you visit most often ?
Those who visit either Cheshunt, Hoddesdon or Waltham Cross at Q18

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Waltham Cross	47.0%	152	12.0%	2	14.3%	5	49.1%	22	51.0%	31	28.6%	3	88.5%	28	60.0%	21	75.0%	26	28.6%	2	60.0%	2	28.6%	7	5.0%	1
Hoddesdon	30.7%	99	84.0%	16	71.4%	24	16.4%	7	11.8%	7	57.1%	6	7.7%	2	10.0%	4	12.5%	4	14.3%	1	10.0%	0	57.1%	15	85.0%	13
Cheshunt	18.8%	61	4.0%	1	12.7%	4	29.1%	13	33.3%	20	4.8%	0	3.8%	1	25.0%	9	6.2%	2	57.1%	4	20.0%	1	14.3%	4	5.0%	1
(Don't know / varies)	3.6%	11	0.0%	0	1.6%	1	5.5%	2	3.9%	2	9.5%	1	0.0%	0	5.0%	2	6.2%	2	0.0%	0	10.0%	0	0.0%	0	5.0%	1
Weighted base:		323		19		33		44		61		10		32		36		35		8		4		25		15
Sample:		342		25		63		55		51		21		26		20		16		14		10		21		20

Q20 How often do you visit (CENTRE MENTIONED AT Q19) ?
Those who mentioned a centre at Q19

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Everyday	4.7%	15	12.0%	2	1.6%	1	5.8%	2	10.2%	6	0.0%	0	3.8%	1	0.0%	0	6.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2 – 3 times a week	12.4%	39	24.0%	4	29.0%	10	13.5%	6	12.2%	7	0.0%	0	0.0%	0	10.5%	4	13.3%	4	14.3%	1	0.0%	0	4.8%	1	10.5%	2
Once a week	19.5%	61	32.0%	6	29.0%	10	13.5%	6	30.6%	18	26.3%	2	15.4%	5	31.6%	11	0.0%	0	14.3%	1	11.1%	0	4.8%	1	5.3%	1
Once a fortnight	12.4%	38	4.0%	1	14.5%	5	15.4%	6	12.2%	7	5.3%	0	23.1%	7	15.8%	5	6.7%	2	14.3%	1	11.1%	0	9.5%	2	0.0%	0
Once a month	26.5%	83	16.0%	3	19.4%	6	26.9%	11	24.5%	14	15.8%	1	42.3%	13	26.3%	9	33.3%	11	28.6%	2	22.2%	1	14.3%	4	42.1%	6
Once every 3 months	11.3%	35	4.0%	1	3.2%	1	17.3%	7	4.1%	2	36.8%	3	11.5%	4	10.5%	4	0.0%	0	14.3%	1	22.2%	1	28.6%	7	26.3%	4
Once every 6 months	6.3%	20	0.0%	0	0.0%	0	7.7%	3	2.0%	1	10.5%	1	0.0%	0	0.0%	0	26.7%	9	7.1%	1	11.1%	0	14.3%	4	5.3%	1
Once a year	3.0%	9	4.0%	1	0.0%	0	0.0%	0	0.0%	0	5.3%	0	3.8%	1	0.0%	0	6.7%	2	7.1%	1	22.2%	1	9.5%	2	5.3%	1
Less often	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.5%	2	0.0%	0
(Don’t know / varies)	3.3%	10	4.0%	1	3.2%	1	0.0%	0	4.1%	2	0.0%	0	0.0%	0	5.3%	2	6.7%	2	0.0%	0	0.0%	0	4.8%	1	5.3%	1
Weighted base:		311		19		33		42		59		9		32		34		33		8		4		25		14
Sample:		330		25		62		52		49		19		26		19		15		14		9		21		19

Q21 What would make you visit the (CENTRE MENTIONED AT Q19) more often ?

Those who mentioned a centre at Q19

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
More non-food stores	23.6%	73	56.0%	10	38.7%	13	19.2%	8	26.5%	16	5.3%	0	26.9%	9	15.8%	5	6.7%	2	14.3%	1	22.2%	1	28.6%	7	5.3%	1
More department stores	18.6%	58	28.0%	5	25.8%	8	21.2%	9	20.4%	12	10.5%	1	23.1%	7	10.5%	4	6.7%	2	14.3%	1	0.0%	0	14.3%	4	31.6%	5
Easier / more parking	7.3%	23	0.0%	0	6.5%	2	11.5%	5	4.1%	2	5.3%	0	11.5%	4	15.8%	5	0.0%	0	7.1%	1	0.0%	0	9.5%	2	5.3%	1
More independent shops	5.9%	18	4.0%	1	12.9%	4	3.8%	2	6.1%	4	0.0%	0	11.5%	4	0.0%	0	0.0%	0	7.1%	1	0.0%	0	9.5%	2	10.5%	2
More specialist shops	5.2%	16	8.0%	1	11.3%	4	5.8%	2	4.1%	2	5.3%	0	11.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	1	5.3%	1
Other	4.8%	15	0.0%	0	3.2%	1	5.8%	2	6.1%	4	0.0%	0	11.5%	4	10.5%	4	0.0%	0	7.1%	1	0.0%	0	0.0%	0	0.0%	0
More higher order / designer stores	4.8%	15	8.0%	1	3.2%	1	5.8%	2	4.1%	2	0.0%	0	7.7%	2	5.3%	2	0.0%	0	7.1%	1	11.1%	0	0.0%	0	15.8%	2
Markets	3.3%	10	0.0%	0	1.6%	1	1.9%	1	4.1%	2	5.3%	0	0.0%	0	10.5%	4	0.0%	0	7.1%	1	0.0%	0	4.8%	1	5.3%	1
Better public transport links	3.1%	10	0.0%	0	1.6%	1	1.9%	1	0.0%	0	0.0%	0	3.8%	1	5.3%	2	6.7%	2	7.1%	1	0.0%	0	9.5%	2	0.0%	0
Cheaper parking	2.6%	8	0.0%	0	3.2%	1	1.9%	1	0.0%	0	5.3%	0	0.0%	0	10.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.8%	2
More food stores	2.5%	8	4.0%	1	6.5%	2	1.9%	1	4.1%	2	0.0%	0	3.8%	1	0.0%	0	0.0%	0	7.1%	1	0.0%	0	0.0%	0	0.0%	0
More security / better personal safety	1.7%	5	0.0%	0	0.0%	0	3.8%	2	4.1%	2	0.0%	0	3.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheaper prices	0.8%	3	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	5.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More services (e.g. bank, library, hairdressers etc.)	0.3%	1	0.0%	0	3.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More leisure facilities (e.g. cinema etc.)	0.3%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More places to eat / drink	0.2%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing)	42.5%	132	32.0%	6	32.3%	11	36.5%	15	51.0%	30	79.0%	7	26.9%	9	31.6%	11	66.7%	22	35.7%	3	66.7%	2	38.1%	10	47.4%	7
(Don't know)	2.5%	8	0.0%	0	3.2%	1	1.9%	1	2.0%	1	0.0%	0	0.0%	0	0.0%	0	13.3%	4	0.0%	0	11.1%	0	0.0%	0	0.0%	0
Weighted base:		311		19		33		42		59		9		32		34		33		8		4		25		14
Sample:		330		25		62		52		49		19		26		19		15		14		9		21		19

Q22A Do you only go to (CENTRE MENTIONED AT Q14 OR Q19) on market days ?

Those who shop in Hoddesdon at either Q14 or Q19

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Yes	18.0%	35	20.5%	12	17.5%	6	40.0%	3	50.0%	4	16.1%	2	0.0%	0	0.0%	0	0.0%	0	50.0%	1	42.9%	1	14.3%	4	12.9%	3
No	82.0%	161	79.5%	46	82.5%	28	60.0%	5	50.0%	4	83.9%	13	100.0%	6	100.0%	7	100.0%	9	50.0%	1	57.1%	2	85.7%	22	87.1%	20
(Don't know)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		196		58		33		8		7		15		6		7		9		1		3		25		23
Sample:		262		78		63		10		6		31		5		4		4		2		7		21		31

Q22B Do you only go to (CENTRE MENTIONED AT Q14 OR Q19) on market days ?

Those who shop in Waltham Cross at either Q14 or Q19

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Yes	21.6%	73	25.0%	1	10.0%	1	19.4%	6	24.4%	13	0.0%	0	16.0%	10	27.8%	27	23.3%	15	0.0%	0	16.7%	0	0.0%	0	0.0%	0
No	78.1%	262	75.0%	2	90.0%	5	80.6%	23	75.6%	41	100.0%	5	82.0%	50	72.2%	69	76.7%	51	100.0%	3	83.3%	2	100.0%	8	100.0%	2
(Don't know)	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		336		3		5		29		54		5		61		96		66		3		2		8		2
Sample:		261		4		10		36		45		11		50		54		30		6		6		7		2

Q23 What town centre do you visit most often for pubs / clubs ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Enfield	9.8%	119	0.0%	0	0.0%	0	6.9%	6	1.0%	1	0.0%	0	0.0%	0	19.6%	36	32.0%	73	2.9%	2	1.1%	0	0.0%	0	2.0%	2
Hertford	9.7%	118	13.7%	10	10.8%	6	4.9%	4	2.0%	2	2.0%	1	0.0%	0	0.0%	0	1.0%	2	3.9%	2	40.2%	14	35.3%	44	41.2%	32
Other	4.7%	57	0.0%	0	2.0%	1	1.0%	1	2.0%	2	6.9%	3	2.0%	2	8.8%	16	6.8%	15	5.9%	3	4.6%	2	6.9%	8	2.0%	2
London (West End)	3.3%	41	2.0%	1	4.9%	3	2.9%	2	4.9%	6	2.0%	1	3.9%	5	3.9%	7	2.9%	7	2.0%	1	4.6%	2	3.9%	5	1.0%	1
Cheshunt	3.1%	37	1.0%	1	6.9%	4	11.8%	10	13.7%	17	1.0%	0	0.0%	0	1.0%	2	1.0%	2	2.0%	1	0.0%	0	0.0%	0	1.0%	1
Hoddesdon	2.8%	34	29.4%	22	7.8%	4	0.0%	0	1.0%	1	0.0%	0	1.0%	1	1.0%	2	1.0%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Waltham Abbey	2.3%	28	0.0%	0	0.0%	0	1.0%	1	1.0%	1	1.0%	0	20.6%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ware	2.3%	28	2.0%	1	1.0%	1	1.0%	1	1.0%	1	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	11.8%	15	9.8%	8
Harlow	1.5%	19	0.0%	0	2.0%	1	1.0%	1	1.0%	1	20.6%	10	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	3
Waltham Cross	1.2%	15	1.0%	1	0.0%	0	1.0%	1	4.9%	6	1.0%	0	1.0%	1	2.0%	4	1.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Potters Bar	1.1%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.5%	14	0.0%	0	0.0%	0	0.0%	0
Chingford	1.0%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.8%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Loughton	0.9%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.8%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cuffley	0.4%	5	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.9%	3	0.0%	0	0.0%	0	0.0%	0
Hatfield	0.3%	4	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0	3.4%	1	0.0%	0	0.0%	0
St Albans	0.3%	4	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Epping	0.3%	3	0.0%	0	0.0%	0	1.0%	1	0.0%	0	2.9%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Watford	0.2%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broxbourne	0.2%	3	0.0%	0	4.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Barnet	0.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Chigwell	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chelmsford	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stevenage	0.1%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bishop's Stortford	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t visit)	49.3%	596	41.2%	31	49.0%	26	59.8%	49	63.7%	78	54.9%	27	46.1%	58	59.8%	109	48.5%	110	45.1%	25	37.9%	13	35.3%	44	32.4%	25
(Don’t know / varies)	4.4%	53	8.8%	7	8.8%	5	3.9%	3	2.9%	4	5.9%	3	3.9%	5	1.0%	2	3.9%	9	4.9%	3	4.6%	2	6.9%	8	4.9%	4
Weighted base:		1210		75		54		82		123		49		125		182		227		56		35		124		77
Sample:		1210		102		102		102		102		102		102		102		103		102		87		102		102

Broxbourne Shopping Survey for GVA Grimley

Q24 What town centre do you visit most often for restaurants ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Enfield	15.8%	191	0.0%	0	2.9%	2	12.7%	10	12.7%	16	1.0%	0	2.9%	4	29.4%	53	45.6%	104	2.9%	2	0.0%	0	0.0%	0	0.0%	0
Hertford	11.5%	139	12.7%	10	12.7%	7	2.0%	2	5.9%	7	3.9%	2	0.0%	0	1.0%	2	1.0%	2	2.9%	2	55.2%	20	44.1%	55	42.2%	32
Hoddesdon	4.3%	52	33.3%	25	14.7%	8	3.9%	3	4.9%	6	2.9%	1	1.0%	1	0.0%	0	1.9%	4	0.0%	0	0.0%	0	0.0%	0	2.9%	2
London (West End)	4.1%	50	2.9%	2	6.9%	4	4.9%	4	5.9%	7	3.9%	2	2.0%	2	6.9%	12	1.9%	4	5.9%	3	4.6%	2	3.9%	5	2.0%	2
Other	4.0%	48	0.0%	0	2.0%	1	4.9%	4	3.9%	5	5.9%	3	5.9%	7	6.9%	12	3.9%	9	2.9%	2	2.3%	1	1.0%	1	3.9%	3
Ware	3.6%	43	7.8%	6	2.0%	1	2.0%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	2.3%	1	17.6%	22	12.7%	10
Harlow	3.2%	39	6.9%	5	4.9%	3	2.0%	2	2.9%	4	27.5%	14	2.9%	4	2.0%	4	0.0%	0	0.0%	0	0.0%	0	2.9%	4	2.0%	2
Chingford	2.6%	32	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	0	18.6%	23	2.9%	5	1.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Potters Bar	2.6%	31	0.0%	0	0.0%	0	4.9%	4	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	45.1%	25	1.1%	0	0.0%	0	0.0%	0
Cheshunt	2.5%	30	1.0%	1	2.0%	1	13.7%	11	11.8%	14	0.0%	0	0.0%	0	0.0%	0	1.0%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Waltham Abbey	2.2%	27	0.0%	0	0.0%	0	0.0%	0	2.9%	4	2.9%	1	17.6%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Loughton	1.2%	14	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	0	9.8%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waltham Cross	0.9%	11	0.0%	0	2.0%	1	0.0%	0	4.9%	6	0.0%	0	2.0%	2	1.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Winchmore Hill	0.9%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	3.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stevenage	0.8%	10	0.0%	0	2.0%	1	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	1.1%	0	3.9%	5	1.0%	1
Cuffley	0.7%	9	0.0%	0	0.0%	0	5.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	4	0.0%	0	0.0%	0	0.0%	0
Barnet	0.5%	6	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	2	1.0%	2	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Broxbourne	0.4%	5	0.0%	0	3.9%	2	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Palmers Green	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	1.0%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Hatfield	0.4%	4	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0	1.1%	0	1.0%	1	0.0%	0
Chigwell	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Albans	0.2%	3	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2	1.1%	0	0.0%	0	0.0%	0
Epping	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0
Roydon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Goffs Oak	0.2%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Nazeing	0.2%	2	0.0%	0	2.0%	1	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Welwyn Garden City	0.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Bishop's Stortford	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0
(Don’t visit)	20.1%	243	18.6%	14	21.6%	12	25.5%	21	26.5%	33	19.6%	10	17.6%	22	27.5%	50	17.5%	40	9.8%	6	16.1%	6	14.7%	18	17.6%	14
(Don’t know / varies)	15.8%	191	16.7%	13	18.6%	10	11.8%	10	13.7%	17	16.7%	8	14.7%	18	19.6%	36	19.4%	44	12.7%	7	12.6%	4	9.8%	12	15.7%	12
Weighted base:		1210		75		54		82		123		49		125		182		227		56		35		124		77
Sample:		1210		102		102		102		102		102		102		102		103		102		87		102		102

Q25 What town centre do you visit most often for evening entertainment ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
London (West End)	15.5%	188	9.8%	7	17.6%	10	23.5%	19	11.8%	14	14.7%	7	13.7%	17	12.7%	23	17.5%	40	18.6%	11	18.4%	7	16.7%	21	15.7%	12
Enfield	9.8%	119	0.0%	0	1.0%	1	7.8%	6	11.8%	14	0.0%	0	2.9%	4	19.6%	36	25.2%	57	1.0%	1	1.1%	0	0.0%	0	0.0%	0
Hertford	6.0%	73	8.8%	7	3.9%	2	2.9%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	4	2.9%	2	29.9%	11	26.5%	33	14.7%	11
Stevenage	2.3%	27	2.0%	1	0.0%	0	1.0%	1	2.0%	2	1.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.4%	1	14.7%	18	2.9%	2
Harlow	2.2%	26	5.9%	4	6.9%	4	0.0%	0	0.0%	0	15.7%	8	2.0%	2	1.0%	2	1.0%	2	0.0%	0	0.0%	0	0.0%	0	4.9%	4
Hoddesdon	1.8%	22	12.7%	10	4.9%	3	2.9%	2	1.0%	1	1.0%	0	1.0%	1	0.0%	0	1.0%	2	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Other	1.7%	21	0.0%	0	1.0%	1	2.0%	2	1.0%	1	1.0%	0	1.0%	1	2.9%	5	3.9%	9	0.0%	0	1.1%	0	0.0%	0	2.0%	2
Waltham Abbey	1.4%	17	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	11.8%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ware	1.0%	13	2.9%	2	1.0%	1	0.0%	0	1.0%	1	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	4	5.9%	5
Chingford	0.9%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.8%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Potters Bar	0.8%	10	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.7%	8	1.1%	0	0.0%	0	0.0%	0
Cheshunt	0.7%	9	1.0%	1	1.0%	1	2.0%	2	3.9%	5	1.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Hatfield	0.5%	7	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2	4.6%	2	2.0%	2	0.0%	0
Broxbourne	0.5%	6	1.0%	1	2.0%	1	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Edmonton	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waltham Cross	0.4%	5	1.0%	1	0.0%	0	1.0%	1	2.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cuffley	0.3%	4	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.9%	3	0.0%	0	0.0%	0	0.0%	0
Loughton	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Barnet	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	3	0.0%	0	0.0%	0	0.0%	0
Abroad	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cambridge	0.1%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Chigwell	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Epping	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Albans	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Chelmsford	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bishop's Stortford	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t do)	46.1%	558	44.1%	33	50.0%	27	45.1%	37	53.9%	66	55.9%	28	50.0%	63	54.9%	100	43.7%	99	45.1%	25	32.2%	11	30.4%	38	40.2%	31
(Don’t know / varies)	6.2%	75	8.8%	7	8.8%	5	8.8%	7	6.9%	8	6.9%	3	3.9%	5	4.9%	9	5.8%	13	1.0%	1	8.0%	3	3.9%	5	11.8%	9
Weighted base:		1210		75		54		82		123		49		125		182		227		56		35		124		77
Sample:		1210		102		102		102		102		102		102		102		103		102		87		102		102

Q26 Where do you go most often to visit the cinema ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Cineworld, Southbury Leisure Park, Enfield	26.7%	323	7.8%	6	17.6%	10	34.3%	28	42.2%	52	2.9%	1	18.6%	23	41.2%	75	52.4%	119	10.8%	6	1.1%	0	1.0%	1	2.0%	2
Cineworld, Queensgate Centre, Harlow	11.3%	136	40.2%	30	28.4%	15	3.9%	3	4.9%	6	40.2%	20	5.9%	7	0.0%	0	3.9%	9	0.0%	0	6.9%	2	10.8%	13	38.2%	29
Cineworld, Stevenage Leisure Park, Stevenage	6.3%	77	2.9%	2	2.0%	1	1.0%	1	2.9%	4	0.0%	0	0.0%	0	1.0%	2	1.0%	2	0.0%	0	16.1%	6	41.2%	51	10.8%	8
Odeon Cinema, The Galleria, Comet Way, Hatfield	3.9%	47	0.0%	0	2.0%	1	6.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.5%	14	36.8%	13	8.8%	11	3.9%	3
Odeon Cinema, Lee Valley Leisure Complex, Enfield	3.3%	40	0.0%	0	2.0%	1	2.9%	2	2.0%	2	0.0%	0	13.7%	17	2.0%	4	5.8%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	1.0%	12	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	4.9%	6	1.0%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2
Broxbourne Civic Hall, High Street, Broxbourne	1.0%	12	1.0%	1	2.9%	2	2.0%	2	1.0%	1	2.9%	1	1.0%	1	1.0%	2	1.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London (West End)	0.4%	4	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wyllyotts Centre, Darkes Lane, Potters Bar	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.9%	3	1.1%	0	0.0%	0	0.0%	0
Civic Hall, High Street, Hoddesdon	0.3%	3	0.0%	0	2.0%	1	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Empire, Anchor Street, Bishops Stortford	0.2%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Odeon, Great North Road, City Centre, Barnet	0.2%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Welwyn Garden City	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	1.1%	0	0.0%	0	0.0%	0
Vue, Woodside Leisure Park, Watford	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t do activity)	41.8%	506	44.1%	33	38.2%	21	46.1%	38	41.2%	51	48.0%	24	49.0%	61	51.0%	93	35.0%	79	53.9%	30	32.2%	11	32.4%	40	32.4%	25
(Don’t know / varies)	3.2%	39	2.0%	1	3.9%	2	0.0%	0	3.9%	5	4.9%	2	6.9%	9	1.0%	2	1.0%	2	1.0%	1	4.6%	2	3.9%	5	10.8%	8
Weighted base:		1210		75		54		82		123		49		125		182		227		56		35		124		77
Sample:		1210		102		102		102		102		102		102		102		103		102		87		102		102

GEN Gender of respondent.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Male	24.8%	300	29.4%	22	19.6%	11	21.6%	18	21.6%	26	24.5%	12	23.5%	29	26.5%	48	24.3%	55	29.4%	17	23.0%	8	23.5%	29	31.4%	24
Female	75.2%	910	70.6%	53	80.4%	43	78.4%	64	78.4%	96	75.5%	37	76.5%	96	73.5%	134	75.7%	172	70.6%	40	77.0%	27	76.5%	95	68.6%	53
Weighted base:		1210		75		54		82		123		49		125		182		227		56		35		124		77
Sample:		1210		102		102		102		102		102		102		102		103		102		87		102		102

AGE Could I ask how old you are ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
18 to 24	3.7%	45	6.9%	5	2.9%	2	3.9%	3	2.9%	4	2.0%	1	3.9%	5	8.8%	16	1.0%	2	0.0%	0	4.6%	2	2.9%	4	2.9%	2
25 to 34	8.0%	96	6.9%	5	6.9%	4	4.9%	4	14.7%	18	7.8%	4	7.8%	10	11.8%	21	1.0%	2	2.0%	1	6.9%	2	10.8%	13	14.7%	11
35 to 44	19.6%	238	17.6%	13	21.6%	12	24.5%	20	20.6%	25	21.6%	11	12.7%	16	14.7%	27	22.3%	51	11.8%	7	13.8%	5	23.5%	29	29.4%	23
45 to 54	19.8%	240	12.7%	10	19.6%	11	11.8%	10	15.7%	19	21.6%	11	23.5%	29	21.6%	39	21.4%	49	13.7%	8	29.9%	11	22.5%	28	21.6%	17
55 to 64	22.5%	272	30.4%	23	27.5%	15	27.5%	23	15.7%	19	16.7%	8	19.6%	25	22.5%	41	27.2%	62	29.4%	17	21.8%	8	16.7%	21	15.7%	12
65 +	25.6%	310	24.5%	19	18.6%	10	25.5%	21	28.4%	35	28.4%	14	32.4%	40	20.6%	37	27.2%	62	41.2%	23	23.0%	8	23.5%	29	14.7%	11
(Refused)	0.8%	9	1.0%	1	2.9%	2	2.0%	2	2.0%	2	2.0%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	1.0%	1
Weighted base:		1210		75		54		82		123		49		125		182		227		56		35		124		77
Sample:		1210		102		102		102		102		102		102		102		103		102		87		102		102

EMP Which of the following best describes the chief wage earner of your household's current employment situation ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Working full time	55.6%	673	52.9%	40	58.8%	32	55.9%	46	52.0%	64	60.8%	30	52.9%	66	58.8%	107	47.6%	108	40.2%	23	62.1%	22	68.6%	85	66.7%	51
Retired	31.6%	382	35.3%	27	25.5%	14	29.4%	24	28.4%	35	31.4%	15	39.2%	49	29.4%	53	35.9%	82	51.0%	29	23.0%	8	24.5%	30	20.6%	16
Working part time	7.3%	89	7.8%	6	10.8%	6	7.8%	6	9.8%	12	5.9%	3	4.9%	6	4.9%	9	9.7%	22	7.8%	4	8.0%	3	4.9%	6	6.9%	5
Unemployed	3.0%	36	1.0%	1	2.9%	2	3.9%	3	4.9%	6	1.0%	0	2.9%	4	3.9%	7	3.9%	9	0.0%	0	3.4%	1	1.0%	1	2.9%	2
A housewife	1.3%	16	1.0%	1	1.0%	1	1.0%	1	1.0%	1	0.0%	0	0.0%	0	2.9%	5	1.9%	4	0.0%	0	1.1%	0	1.0%	1	2.0%	2
A student	0.4%	5	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0	1.1%	0	0.0%	0	0.0%	0
(Refused)	0.7%	9	1.0%	1	1.0%	1	2.0%	2	2.9%	4	1.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.1%	0	0.0%	0	1.0%	1
Weighted base:		1210		75		54		82		123		49		125		182		227		56		35		124		77
Sample:		1210		102		102		102		102		102		102		102		103		102		87		102		102

CAR How many cars does your household own or have the use of ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
None	15.9%	192	13.7%	10	9.8%	5	8.8%	7	20.6%	25	8.8%	4	17.6%	22	19.6%	36	19.4%	44	21.6%	12	11.5%	4	11.8%	15	8.8%	7
One	45.5%	550	39.2%	30	37.3%	20	33.3%	27	38.2%	47	44.1%	22	45.1%	56	54.9%	100	54.4%	124	41.2%	23	43.7%	16	42.2%	52	44.1%	34
Two	27.2%	329	37.3%	28	35.3%	19	38.2%	31	33.3%	41	34.3%	17	24.5%	31	15.7%	29	17.5%	40	30.4%	17	28.7%	10	31.4%	39	35.3%	27
Three or more	10.4%	126	8.8%	7	16.7%	9	15.7%	13	4.9%	6	10.8%	5	12.7%	16	8.8%	16	8.7%	20	5.9%	3	14.9%	5	13.7%	17	10.8%	8
(Refused)	1.1%	14	1.0%	1	1.0%	1	3.9%	3	2.9%	4	2.0%	1	0.0%	0	1.0%	2	0.0%	0	1.0%	1	1.1%	0	1.0%	1	1.0%	1
Weighted base:		1210		75		54		82		123		49		125		182		227		56		35		124		77
Sample:		1210		102		102		102		102		102		102		102		103		102		87		102		102

INC Approximately what is your total household income ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
£0 - £14,999	10.6%	128	9.8%	7	9.8%	5	5.9%	5	15.7%	19	6.9%	3	16.7%	21	11.8%	21	12.6%	29	4.9%	3	8.0%	3	5.9%	7	4.9%	4
£15,000 - £19,999	3.5%	42	7.8%	6	1.0%	1	1.0%	1	1.0%	1	2.9%	1	3.9%	5	3.9%	7	2.9%	7	3.9%	2	3.4%	1	7.8%	10	1.0%	1
£20,000 - £29,999	6.3%	76	4.9%	4	3.9%	2	4.9%	4	2.0%	2	8.8%	4	3.9%	5	9.8%	18	9.7%	22	2.9%	2	6.9%	2	3.9%	5	7.8%	6
£30,000 - £39,999	6.6%	80	6.9%	5	4.9%	3	7.8%	6	9.8%	12	8.8%	4	2.0%	2	8.8%	16	5.8%	13	2.9%	2	2.3%	1	9.8%	12	3.9%	3
£40,000 - £49,999	5.6%	68	3.9%	3	6.9%	4	5.9%	5	4.9%	6	7.8%	4	4.9%	6	4.9%	9	7.8%	18	3.9%	2	6.9%	2	4.9%	6	3.9%	3
£50,000 - £59,999	4.5%	55	1.0%	1	2.9%	2	3.9%	3	4.9%	6	3.9%	2	1.0%	1	6.9%	12	4.9%	11	3.9%	2	5.7%	2	6.9%	8	4.9%	4
£60,000 - £69,999	2.7%	33	3.9%	3	2.9%	2	2.9%	2	1.0%	1	2.9%	1	1.0%	1	2.0%	4	1.9%	4	4.9%	3	4.6%	2	2.9%	4	7.8%	6
£70,000 - £79,999	1.4%	17	0.0%	0	0.0%	0	2.0%	2	1.0%	1	2.9%	1	2.0%	2	1.0%	2	0.0%	0	0.0%	0	3.4%	1	2.0%	2	6.9%	5
£80,000 - £89,999	1.3%	16	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	0	2.0%	2	0.0%	0	2.9%	7	2.0%	1	3.4%	1	1.0%	1	2.0%	2
£90,000 - £99,999	0.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	2.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2
£100,000 - £149,999	2.4%	29	1.0%	1	3.9%	2	3.9%	3	2.0%	2	2.0%	1	5.9%	7	1.0%	2	1.9%	4	2.0%	1	5.7%	2	1.0%	1	2.0%	2
£150,000+	1.0%	12	0.0%	0	2.0%	1	2.9%	2	0.0%	0	2.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	0	2.0%	2	3.9%	3
(Don't know / refused)	53.5%	648	60.8%	46	61.8%	33	58.8%	48	56.9%	70	49.0%	24	52.9%	66	50.0%	91	49.5%	113	68.6%	39	48.3%	17	51.0%	63	49.0%	38
Weighted base:		1210		75		54		82		123		49		125		182		227		56		35		124		77
Sample:		1210		102		102		102		102		102		102		102		103		102		87		102		102

ETH The following question will be used in a statistical format only, and will help us to assess diverse needs and ensure all have access to our services. What is your ethnic background ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
White (British / Irish / Other)	90.9%	1099	95.1%	72	93.1%	50	91.2%	75	90.2%	111	95.1%	47	92.2%	115	77.5%	141	92.2%	210	93.1%	53	94.3%	33	96.1%	119	97.1%	75
Black / Black British (Caribbean / African / other black)	2.8%	34	1.0%	1	2.9%	2	0.0%	0	3.9%	5	2.0%	1	2.9%	4	7.8%	14	2.9%	7	1.0%	1	0.0%	0	1.0%	1	0.0%	0
Asian / Asian British (Indian / Pakistani / Bangladeshi / Other Asian)	2.3%	28	2.0%	1	0.0%	0	1.0%	1	2.0%	2	0.0%	0	1.0%	1	7.8%	14	1.9%	4	1.0%	1	3.4%	1	1.0%	1	0.0%	0
Mixed (any mixed category)	1.0%	12	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	1.0%	1	3.9%	7	1.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chinese	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	2	0.0%	0	1.1%	0	0.0%	0	0.0%	0
(Refused)	2.7%	33	2.0%	1	2.9%	2	6.9%	6	3.9%	5	2.9%	1	2.0%	2	2.9%	5	1.0%	2	4.9%	3	1.1%	0	2.0%	2	2.9%	2
Weighted base:		1210		75		54		82		123		49		125		182		227		56		35		124		77
Sample:		1210		102		102		102		102		102		102		102		103		102		87		102		102

DIS Do you have any disabilites or long term illness which affects your daily life or the work you can do ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Yes	19.1%	231	18.6%	14	12.7%	7	24.5%	20	16.7%	20	14.7%	7	16.7%	21	28.4%	52	17.5%	40	24.5%	14	13.8%	5	14.7%	18	16.7%	13
No	79.6%	963	79.4%	60	86.3%	47	72.5%	59	80.4%	99	83.3%	41	82.4%	103	70.6%	128	82.5%	188	73.5%	41	85.1%	30	83.3%	103	82.4%	63
(Refused)	1.4%	17	2.0%	1	1.0%	1	2.9%	2	2.9%	4	2.0%	1	1.0%	1	1.0%	2	0.0%	0	2.0%	1	1.1%	0	2.0%	2	1.0%	1
Weighted base:		1210		75		54		82		123		49		125		182		227		56		35		124		77
Sample:		1210		102		102		102		102		102		102		102		103		102		87		102		102

SEG Socioeconomic Grouping:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
A	2.0%	24	2.9%	2	2.9%	2	1.0%	1	1.0%	1	0.0%	0	3.9%	5	1.0%	2	1.0%	2	2.0%	1	4.6%	2	2.0%	2	5.9%	5
B	10.0%	121	7.8%	6	18.6%	10	7.8%	6	9.8%	12	10.8%	5	10.8%	13	8.8%	16	4.9%	11	14.7%	8	19.5%	7	11.8%	15	14.7%	11
C1	31.1%	376	24.5%	19	36.3%	20	26.5%	22	24.5%	30	32.4%	16	30.4%	38	31.4%	57	34.0%	77	31.4%	18	40.2%	14	28.4%	35	40.2%	31
C2	19.9%	241	20.6%	16	13.7%	7	26.5%	22	22.5%	28	22.5%	11	18.6%	23	15.7%	29	18.4%	42	12.7%	7	17.2%	6	29.4%	36	18.6%	14
D	13.4%	162	14.7%	11	11.8%	6	9.8%	8	17.6%	22	11.8%	6	16.7%	21	19.6%	36	13.6%	31	6.9%	4	5.7%	2	8.8%	11	5.9%	5
E	17.3%	210	20.6%	16	9.8%	5	16.7%	14	14.7%	18	18.6%	9	19.6%	25	17.6%	32	22.3%	51	22.5%	13	8.0%	3	14.7%	18	8.8%	7
(Refused)	6.3%	76	8.8%	7	6.9%	4	11.8%	10	9.8%	12	3.9%	2	0.0%	0	5.9%	11	5.8%	13	9.8%	6	4.6%	2	4.9%	6	5.9%	5
Weighted base:		1210		75		54		82		123		49		125		182		227		56		35		124		77
Sample:		1210		102		102		102		102		102		102		102		103		102		87		102		102

QUOTA Zone:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
Zone 1	6.2%	75	100.0%	75	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2	4.5%	54	0.0%	0	100.0%	54	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3	6.8%	82	0.0%	0	0.0%	0	100.0%	82	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 4	10.1%	123	0.0%	0	0.0%	0	0.0%	0	100.0%	123	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 5	4.1%	49	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	49	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 6	10.3%	125	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	125	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 7	15.0%	182	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	182	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 8	18.8%	227	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	227	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 9	4.7%	56	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	56	0.0%	0	0.0%	0	0.0%	0
Zone A	2.9%	35	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	35	0.0%	0	0.0%	0
Zone B	10.2%	124	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	124	0.0%	0
Zone C	6.4%	77	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	77
Weighted base:		1210		75		54		82		123		49		125		182		227		56		35		124		77
Sample:		1210		102		102		102		102		102		102		102		103		102		87		102		102

PC Postcode Sector:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone A		Zone B		Zone C	
AL9 6	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.8%	5	0.0%	0	0.0%	0
CM19 5	2.6%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	64.7%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
E4 7	2.9%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	28.4%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN1 1	4.0%	49	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.4%	49	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN1 3	3.5%	42	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.4%	42	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN1 4	3.3%	40	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.5%	40	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN10 6	2.8%	33	0.0%	0	61.8%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN10 7	1.7%	21	0.0%	0	38.2%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN11 0	1.7%	21	27.5%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN11 8	1.9%	23	30.4%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN11 9	2.6%	32	42.2%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN2 0	2.7%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.6%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN2 6	0.5%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN2 7	1.8%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.7%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN2 8	2.7%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.6%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN2 9	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN3 4	2.5%	30	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.7%	30	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN3 5	3.2%	39	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.6%	39	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN3 6	5.6%	68	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	37.3%	68	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN3 7	3.7%	45	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.5%	45	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN6 1	1.8%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	38.2%	22	0.0%	0	0.0%	0	0.0%	0
EN6 4	1.6%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	33.3%	19	0.0%	0	0.0%	0	0.0%	0
EN6 5	1.3%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	28.4%	16	0.0%	0	0.0%	0	0.0%	0
EN7 5	2.6%	31	0.0%	0	0.0%	0	38.2%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN7 6	4.2%	51	0.0%	0	0.0%	0	61.8%	51	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN8 0	2.6%	31	0.0%	0	0.0%	0	0.0%	0	25.5%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN8 7	1.6%	19	0.0%	0	0.0%	0	0.0%	0	15.7%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN8 8	3.0%	36	0.0%	0	0.0%	0	0.0%	0	29.4%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN8 9	3.0%	36	0.0%	0	0.0%	0	0.0%	0	29.4%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN9 1	2.6%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.5%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN9 2	1.4%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	35.3%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
EN9 3	3.7%	45	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	36.3%	45	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
IG10 4	1.0%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.8%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
SG12 0	2.4%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.5%	29	0.0%	0
SG12 7	2.0%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.6%	24	0.0%	0
SG12 8	1.9%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	30.4%	23
SG12 9	1.1%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.7%	13
SG13 7	3.4%	41	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	52.9%	41
SG13 8	1.9%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	63.2%	22	0.0%	0	0.0%	0
SG14 1	0.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.0%	8	0.0%	0	0.0%	0
SG14 2	1.7%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.7%	21	0.0%	0
SG14 3	4.1%	50	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	40.2%	50	0.0%	0
Weighted base:		1210		75		54		82		123		49		125		182		227		56		35		124		77
Sample:		1210		102		102		102		102		102		102		102		103		102		87		102		102