East Herts
Retail & Town Centre Study

July 2026

prepared for

East Herts District Council

Contents

Executive Summary

The Retail Group and CPW Planning have been commissioned by East Herts District Council ('EHDC') to prepare this Retail and Town Centre Study. It provides the evidence base to assist EHDC with its work on the new Local Plan and supports the development management function of the local planning authority.

The Study is principally focused on the following centres:

- Bishop's Stortford (Principal Town Centre)
- Hertford (Secondary Town Centre)
- Buntingford (Minor Town Centre)
- Sawbridgeworth (Minor Town Centre)
- Ware (Minor Town Centre)

The Study supersedes the 2013 Retail and Town Centre Study ('2013 Study') and has been prepared in the context of significant changes and events since 2013. These include Brexit, changing economic conditions, the Covid-19 pandemic, the continued growth of online shopping, widespread retailer closures, and planning reform.

The Study has been prepared in accordance with the National Planning Policy Framework ('NPPF') (December 2024) and the *Town centres and retail* section of the Planning Practice Guidance ('PPG') (as updated on 18 September 2020).

Market Context and Trends

As section 3 highlights, it is important to look beyond retail-led town centres and towards more multi-purpose destinations in their offer, use and experience. Online shopping and other consumer trends, including changes to shopping, work and lifestyle habits, have resulted in reduced footfall and an increasing number of store closures.

The future vitality and viability of town centres in East Herts much depends on how they adapt to reduced retailer demand; stay relevant and convenient to the consumer; and become more multi-purpose. For the larger centres, addressing the retail 'over-supply' landscape, finding solutions for outdated/vacant larger-format stores (i.e. repurpose or redevelop for alternative uses) and increasing residential provision is likely to be important.

Healthchecks and Place Reviews

Section 4 of the report contains the findings of a series of healthchecks and place reviews for each of the five town centres in the Study. The research workstreams underpinning the findings and analysis include a robust and comprehensive survey of businesses in each town centre; the results of the household survey of more than 800 consumers; and a survey of stakeholders for each town, including elected members, Council officers, trade associations, civic groups and the BID in Bishop's Stortford.

Headline findings of the healthchecks and place reviews reveal that *Bishop's Stortford* is in good health, with good levels of footfall, retail performance and business optimism. Furthermore, vacant premises are being reoccupied in a timely manner, the town centre has lots of reasons for consumers to both visit and 'like it' and much of the environment across the town centre is appealing and well kept. Businesses and stakeholders would like to see North Street regenerated, Jacksons Square to be fully occupied, air quality around Hockerill Junction improved, and the Old River Lane and the Goods Yard regeneration schemes delivered, occupied and open.

Hertford on the whole is in good health and has a multitude of reasons for consumers to visit it, including an excellent night time offer, super range of independent businesses, extensive beauty services offer, attractive environment and many strong retail, leisure and cultural anchors. As a result, the town centre has a strong positive reputation by consumers as a place to visit and enjoy, as well as a place to trade with businesses.

Businesses identify many opportunities to improve the town, with parking dominating the list, although it is less of an issue for residents. The daytime consumer visit pattern is dominated by visits of a relative short duration (less than an hour) and if trips to the town centre start to be perceived as being difficult or onerous, this could affect the consumer visit propensity. On balance, the town centre is probably in reasonable health; however, a focus on maintaining and improving this through additional and visible marketing / promotion /

improved markets, ensuring visits to Hertford are kept as easy and convenient as possible (for all modes of travel), and a curated program of events will all help to secure its future.

Sawbridgeworth and *Buntingford town centres* are both clearly in good health, have good levels of footfall, low levels of vacancies, and good levels of optimism in the mind's eye of both consumers and businesses in regards their future as local convenient and convenience-based town centres.

The healthcheck of *Ware* town centre does reveal some findings of minor concern. Not only does it have the highest level of vacancies amongst all five town centres in the Study, but many of the vacant units are also in the core of the town centre and have remained empty for some time. Many businesses are reporting challenging trading conditions and are concerned about the future prospects of trading in the town centre. Furthermore, the town centre is not attracting the quality, appeal and energy of new businesses on the whole that Hertford and Bishop's Stortford are.

The one exception to this is the new mixed-use development on Amwell End, which has secured a range of good-quality contemporary food and beverage businesses, which are evidently trading well and popular with consumers, so all is far from lost for Ware town centre.

District-Wide Retail Needs and Strategy

Our retail capacity forecasts represent the 'baseline' scenario for new retail floorspace in East Herts, in which we assume that the 2026 survey-derived pattern of market shares of convenience and comparison goods expenditure, in each of the shopping destinations modelled, remains unchanged throughout the forecasting period. The forecasts, particularly beyond the next five years, should be treated with a degree of caution as they are based on various assumptions and forecasts that can and will change.

The summary table overleaf shows the capacity for convenience goods floorspace (sqm net sales area). It presents our individual capacity forecasts for convenience goods floorspace, together with our overall (i.e. combined) forecasts for the District. The forecasts indicate there will be a limited, yet decreasing, theoretical over-supply of convenience goods floorspace from 2029 onwards. This over-supply is largely driven by the survey-indicated (under) trading performance of existing convenience retail provision in Bishop's Stortford Town Centre.

Apart from Ware Town Centre, it is assessed that all the other centres in East Herts are faced with modest levels of over-supply. This is offset by the positive capacity identified for the non-central stores in East Herts (about 1,900 sqm net sales area by 2029). Yet this does not justify new 'non-central' foodstore development or extensions should proposals come forward; rather, the sequential approach should be applied. It is also to be noted that, where there is limited or no expenditure capacity to support additional convenience goods floorspace, as is the case for East Herts District as a whole, any new foodstore development or extensions will have the potential to have greater adverse impacts on existing centres/stores. This is because there is a direct correlation between capacity and impact.

Notwithstanding, the overall picture across the District is one of a limited over-supply of convenience goods floorspace; and we assess there is no quantitative need to plan or allocate sites for new convenience goods floorspace. The strategy should be focused on encouraging activity and linked-trips in the town centres to support their existing convenience retail offers, or store refurbishments, as opposed to planning for new foodstores.

Summary of capacity forecasts: convenience goods (sqm net sales area)

	2029	**2034**	**2039**	**2044**
Bishop's Stortford Town Centre	-1,350	-1,350	-1,300	-1,300
Hertford Town Centre	-300	-300	-300	-300
Buntingford Town Centre	-300	-300	-300	-300
Sawbridgeworth Town Centre	-50	-50	-50	-50
Ware Town Centre	600	600	600	600
Other Centres in East Herts (as a group)	-900	-850	-800	-750
Madford Retail Park, Hertford	-	-	-	-
Other non-central stores in East Herts (as a group)	1,900	1,900	1,900	1,950
Combined forecasts for East Herts	**-400**	**-350**	**-250**	**-150**

Source:
Tables 1-71, Appendix C.
Notes:
a) The forecasts are 'baseline' forecasts after allowing for the committed developments.
b) The forecasts are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.
c) Forecasts rounded to the nearest 50 sqm net.

The position in respect of comparison goods floorspace, as set out in the summary table below, is that there will be a limited theoretical over-supply of comparison goods floorspace in East Herts (all shopping destinations modelled as a whole) in 2029. However, in the longer term, due to stable/positive spending growth as currently forecasted by Experian, capacity for additional comparison goods floorspace is identified and will rise to about 1,800 sqm net sales area by the end of the plan period – principally due to assessed expenditure-based capacity in Bishop's Stortford Town Centre.

Considering the District-wide picture is one of over-supply in the earlier part of the forecasting period, and noting that longer term capacity forecasts should be treated with a degree of caution, we assess there is no quantitative need to plan or allocate sites for new comparison goods floorspace. This further aligns with market trends and a reduction in retailer demand. There will be scope, however, for existing vacant shop floorspace in the existing centres to accommodate any retailer demand that arises. This is most likely within the busier, more prime areas, with the secondary areas supporting a high proportion of services and/or seeing a contraction of retail space (i.e. its release for alternative uses such as residential).

Summary of capacity forecasts: comparison goods (sqm net sales area)

	2029	2034	2039	2044
Bishop's Stortford Town Centre	150	800	1,450	1,900
Hertford Town Centre	0	100	200	300
Buntingford Town Centre	0	50	50	100
Sawbridgeworth Town Centre	0	0	50	50
Ware Town Centre	0	100	200	250
Other Centres in East Herts (as a group)	0	50	50	50
Madford Retail Park, Hertford	450	500	600	650
Other non-central stores in East Herts (as a group)	-1,800	-1,700	-1,600	-1,500
Combined forecasts for East Herts	**-1,200**	**-100**	**1,000**	**1,800**

Source:
Tables 1-71, Appendix C.
Notes:
a) The forecasts are 'baseline' forecasts after allowing for the committed developments.
b) The forecasts are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.
c) Forecasts rounded to the nearest 50 sqm net.

Our retail capacity forecasts serve as a guide for future planning policies and decisions on planning applications. The forecasts should be reviewed regularly in the light of actual population and (in particular) expenditure growth, the outlook for which is subject to change given macro-economic conditions and trends.

Madford Retail Park, Hertford

For the purposes of the market share analysis and capacity assessment, we have modelled Madford Retail Park separately as a shopping destination given it has been promoted through the call-for-sites process. The retail park currently includes Matalan, Pets at Home and Wickes, in addition to Majestic Wine and Costa; and the household survey research indicates that it secures a low overall market share of catchment area expenditure on comparison goods (2.6%).

If Madford Retail Park is the subject of residential-led redevelopment in future years, requiring the closure of its existing stores, similar competing destinations in Harlow/Stevenage are well placed to capture much of its current expenditure market shares – unless an alternative site outside (preferably on the edge of) one of the District's town centres is available, suitable and viable for large format retail. No potential alternative site has been identified at this stage; and we consider there is limited prospect of the nearest town centres of Hertford and Ware attracting the expenditure 'lost' arising from the potential closure of Madford Retail Park given the nature of their respective retail offers.

Section 9 of this report sets out a recommended policy approach for assessing any future redevelopment proposals at Madford Retail Park.

Commercial Leisure Needs and Strategy

Bishop's Stortford and Hertford Town Centres are the District's principal destinations for commercial leisure facilities while the smaller town centres have a more limited offering. Overall, our analysis identifies there is scope for improvement in the District's commercial leisure offer although the potential for growth is limited by market factors, supply-side constraints and accessible competing destinations. There is understandably some 'leakage' and a degree of reliance on larger surrounding destinations such as Stevenage and Harlow for leisure-based activities (and cultural facilities, in particular Central London / West End). Notwithstanding, we consider there is no need for EHDC to allocate specific sites for new leisure provision. A more flexible approach is recommended.

Our recommended policy response to commercial leisure needs is included in section 9 of this report.

Network and Hierarchy of Centres

We recommend that the District's network and hierarchy of centres should comprise:

- Principal Town Centre: Bishop's Stortford
- Major Town Centre: Hertford
- Town Centres: Buntingford; Sawbridgeworth; and Ware
- District Centres: The Thorley Centre (Bishop's Stortford); and Bishop's Park (Bishop's Stortford)
- Local Centres: centres assessed by the Council to fulfil the role/function of a Local Centre

Suggested descriptions of each tier of centre within the hierarchy are as follows:

Tier of centre	Description
Principal Town Centre	*At the apex of the District's retail hierarchy, the centre is the principal focus for comparison and convenience goods shopping, services, leisure, and other commercial, community and cultural facilities serving residents in the town of Bishop's Stortford and visitors from a wider catchment area.*
Major Town Centre	*Sitting below the Principal Town Centre in the District's retail hierarchy, the centre provides a range of shops, services, businesses, and community and cultural facilities for residents in the town of Hertford as well as surrounding towns and villages.*
Town Centres	*Although the Town Centres are more varied in their scale/ character, they have important roles providing shops, services, businesses and community facilities to serve the needs of the towns' residents and local catchments.*
District Centres	*Centres principally serving the convenience-based retail and service needs of a hinterland which includes a few surrounding suburbs and villages.*
Local Centres	*Centres with a limited range of shops and services catering for the basic needs of their walk-in catchments and passers-by.*

Other Policy Recommendations

Other policy recommendations reflecting the updated evidence base and the provisions of the NPPF are set out in section 9 of this report.

1. Introduction

Purpose of the Study

1.1 The Retail Group and CPW Planning have been commissioned by East Herts District Council (‘EHDC’) to prepare this Retail and Town Centre Study.

1.2 The Study supersedes the 2013 Retail and Town Centre Study (‘2013 Study’) and has been prepared in the context of significant changes and events since 2013. These include Brexit, changing economic conditions, the Covid-19 pandemic, the continued growth of online shopping, widespread retailer closures, and planning reform.

1.3 The Study is based on the latest available information including primary research in the form of town centre ‘place’ reviews, business-to-business interview surveys in each of the centres, wider stakeholder engagement, and a new household survey of shopping patterns in the area. We have used the most up-to-date population and expenditure data and projections available from Experian.

1.4 The main objectives of the Study can be summarised as follows:

i. Review the national and local planning policy context relevant to the Study;

ii. Consider the key trends impacting on retail and town centres – and the implications for town centres in East Herts;

iii. Undertake town centre healthchecks and place reviews;

iv. Analyse shopping patterns (or market shares), including expenditure leakage, and other consumer behaviours based on the results of the new household survey;

v. Forecast the expenditure-based capacity for new (or surplus) retail floorspace in the area;

vi. Prepare a commercial leisure ‘needs’ assessment; and

vii. Develop a retail strategy and policy recommendations for East Herts.

1.5 The town centres in East Herts that are the principal focus of this Study are:

- Bishop’s Stortford (Principal Town Centre)
- Hertford (Secondary Town Centre)
- Buntingford (Minor Town Centre)
- Sawbridgeworth (Minor Town Centre)
- Ware (Minor Town Centre)

1.6 The Study provides the evidence base to assist EHDC with its work on the new Local Plan and supports the development management function of the local planning authority. It has been prepared in accordance with the National Planning Policy Framework (‘NPPF’) (December 2024) and the *Town centres and retail* section of the Planning Practice Guidance (‘PPG’) (as updated on 18 September 2020).

2. Planning Policy Context

2.1 This section provides an overview of the relevant national and local planning policy context pertaining to retail, leisure and other main town centre uses. We also consider the changes to the Use Classes Order ('UCO') and permitted development rights. Whilst this section focuses on the policy context for retail and town centres, there are other strategies that exist and / or form part of the background to the new Local Plan which may have a bearing on the recommendations and the delivery of the strategy made in later sections. This particularly includes the Local Cycling and Walking Infrastructure Plan (LCWIP), which defines priorities for active travel, walking and cycling which will have implications for the district's town centres in particular.

National Planning Policy Framework (NPPF)

2.2 The current NPPF was published in December 2024.

2.3 Local Planning Authorities (LPAs) should take the NPPF into account in the preparation of Local Plans. The presumption in favour of sustainable development is a key objective for both plan making and decision-taking, and the NPPF (paragraph 11) sets out the Government's view of what constitutes sustainable development.

2.4 For plan-making the NPPF states that plans should promote a sustainable pattern of development by seeking to meet the development needs of their area, align growth and infrastructure, and improve the environment. For decision-taking the onus is on LPAs to approve development proposals that accord with an up-to-date development plan without delay. Where the development plan is silent, or policies are out of-date, permission should be granted unless there is a clear reason for refusal.

2.5 Chapter 3 'Plan-making' provides guidance to LPAs on preparing their development plans. Paragraph 20 requires plans to include strategic policies that make sufficient provision for (inter alia) housing, employment, retail, leisure and other commercial development, alongside infrastructure and community facilities.

2.6 Paragraph 32 states that planning policies should be underpinned by relevant and up-to-date evidence. To ensure plans and spatial development strategies are relevant they should be reviewed at least once every five years and updated as necessary (paragraph 34).

2.7 Chapter 6 'Building a strong, competitive economy' requires planning policies to create the conditions in which businesses can invest, expand and adapt. It states that planning policies should allow each area to build on its strengths, counter any weaknesses and address the challenges of the future, including by setting out a clear economic strategy and being flexible enough to accommodate needs not anticipated in the development plan.

2.8 Chapter 7 'Ensuring the vitality of town centres' provides guidance on plan-making and decision-taking for retail and other main town centre uses. Paragraph 90 sets out criteria that LPAs should consider when preparing planning policies. These include:

- Defining a network and hierarchy of town centres;
- Defining town centre boundaries and Primary Shopping Areas;
- Retaining and enhancing existing markets and the potential to create new markets;
- Meeting anticipated needs for main town centre uses over (at least) a 10-year period by way of identifying suitable town centre sites;
- Where suitable town centre sites are not available, identifying suitable edge-of-centre or other locations subject to their connectivity and accessibility to the town centre;
- Promoting residential development in town centres.

2.9 Paragraphs 91-95 specifically set out the sequential and impact tests relevant to determining applications for new retail and other main town centres uses that are neither in an existing centre, nor in accordance with an up-to-date development plan.

2.10 Paragraph 91 states that, *Main town centre uses should be located in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered*.

2.11 Paragraph 92 adds, *When considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge of centre sites are fully explored*.

2.12 Paragraph 94 refers to the impact test. It applies to all applications for retail and leisure development (only) over a proportionate, locally set floorspace threshold (the default threshold is 2,500 sqm gross if there is no locally set threshold). This should include assessment of the impact on:

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

b) town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme).

2.13 The NPPF (paragraph 95) states that, *Where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the considerations in paragraph 94, it should be refused*.

Consultation on the Draft NPPF

2.14 Consultation on the Draft NPPF ('DNPPF') was published in December 2025 and provides an indication of the potential changes to the NPPF in the coming months. The main potential changes to retail and town centre policy (Section 8 of the DNPPF) include:

- Retaining the requirement to define town centre boundaries (Policy S2 and Policy TC1);
- Retaining support for the long-term vitality and viability of town centres, to be informed by a strategy to ensure that the full range of potential needs and opportunities are considered (Policy TC1);
- Extending the policy requirements when developing a hierarchy of centres to include consideration for areas within centres that may be particularly suitable for a greater diversity and/or intensification of use, including through residential development, and where infrastructure and public realm improvements are proposed (Policy TC1);
- Requiring a range of suitable sites in town centres to be allocated to meet identified needs over the plan period; however, before reviewing town centre boundaries to accommodate any development needs, existing vacant town centre sites and areas that are particularly suitable for intensification should be considered (Policy TC1);
- Promoting the use of design guides, design codes and masterplans to support town centre visions and the potential use of Article 4 directions to remove a permitted development right where these are justified as a means to support the vitality and viability of particular centres and maintain their character (Policy TC1);
- The introduction of three national decision-making policies that (i) promote development in town centres that support their overall vitality and viability (Policy TC2); (ii) retain the sequential test for proposals involving main town centre uses outside town centres (Policy TC3); and (iii) retain the impact test (Policy TC4); and
- Encouraging the effective use of previously developed land and the re-use of under-utilised retail sites (Policy L1).

2.15 It is to be noted that the potential changes to retail and town centre policy remove the requirement to define Primary Shopping Areas ('PSAs'), though the Annex B Glossary to the DNPPF maintains reference to PSAs.

2.16 In addition, the Consultation paper accompanying the DNPPF considers (i) the possible removal of the sequential test from policy; and (ii) the possible removal of specific reference to 'markets' on the basis *their existence is not controlled directly by planning*.

Planning Practice Guidance (PPG)

2.17 This Study draws on advice set out in the *Town centres and retail* section of the PPG, which was last updated in September 2020.

2.18 Of relevance is paragraph 004, which states that town centre strategies and the assessment of the potential for centres to accommodate a suitable range of development should focus on a limited period (such as the next five years) given the uncertainties around forecasting long-term retail trends and consumer behaviour.

2.19 The PPG provides advice to LPAs on the preparation of development plans and town centre strategies. In terms of what a town centre strategy should contain, paragraph 004 refers to:

- the realistic role, function and hierarchy of town centres over the plan period;
- the vision for the future of each town centre, including the most appropriate mix of uses;
- the ability of the town centre to accommodate the scale of assessed need for main town centre uses, and associated need for expansion, consolidation, restructuring or to enable new development or the redevelopment of under-utilised space;
- how existing land can be used more effectively;
- opportunities for improvements to the accessibility and wider quality of town centre locations;
- what complementary strategies are necessary or appropriate to enhance the town centre;
- the role that different stakeholders can play in delivering the vision;
- appropriate policies to address environmental issues facing town centres.

2.20 In circumstances where future development needs cannot be accommodated in town centre locations, the PPG (paragraph 005) states that *planning authorities should plan positively to identify the most appropriate alternative strategy for meeting the identified need for these main town centre uses, having regard to the sequential and impact tests.*

2.21 In applying the sequential test for plan-making purposes, LPAs are expected to consider the following checklist (paragraph 010):

- Has the need for main town centre uses been assessed?
- Can the identified need for main town centre uses be accommodated on town centre sites?
- If the additional main town centre uses required cannot be accommodated on town centre sites, what are the next sequentially preferable sites that they can be accommodated on?

2.22 Paragraph 006 of the PPG identifies a series of indicators that may be relevant in assessing the health of town centres, including but not limited to the diversity of uses, vacancy rates, retailer representation, pedestrian flows, and evidence of barriers to business investment.

2.23 Guidance is also provided on permitted development and change of use in town centres (paragraphs 007-008), including where it may be appropriate to use permitted development rights to support flexibility in town centres.

Changes to the Use Classes Order and permitted development rights

2.24 One of the most significant planning reforms affecting town centres in recent years is the changes to the Use Classes Order. These were introduced in September 2020 to provide a more flexible approach to 'controlling' retail, commercial, business and service uses.

2.25 The previous definition of Class A uses including A1 shops has been replaced, in part, with Class E; although previous A4/A5 uses are not covered within Class E and are defined as Sui Generis. Class E also encompasses previous B1 uses (including offices) and some, but not all, previous D1 non-residential institutions and D2 leisure uses. In addition to this, the changes have seen the introduction of Class F1 (Learning and non-residential institutions) and F2 (Local community) and the restructuring of Sui Generis uses (i.e. theatres, laundrettes, cinemas, hot food takeaways etc).

2.26 Class E therefore includes some, but not all, main town centre uses as well as some uses (e.g. creche, day nursery, medical and health services) excluded from the definition of main town centre uses. Annex 2 (Glossary) to the NPPF defines main town centre uses as:

Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities.

2.27 The changes to the Use Classes Order have implications for primary and secondary shopping frontages, which have been adopted and used by local authorities as a development management tool to protect against the loss of retail uses within frontage(s) inter alia. This is because under Class E there is less control, and changes of use between Class E uses (e.g. shops to restaurants/cafes) do not constitute development and therefore do not require planning permission.

2.28 Whilst the ability to use space more flexibly and/or co-locate two or more asset classes within the same premises is important in a fast-moving retail sector, the changes are more problematic when defining town centre boundaries and primary shopping areas for plan making purposes. In particular, the NPPF (Annex 2) defines a primary shopping area as *'where retail development is concentrated'* which fails to recognise that A1 retail is now encompassed in Class E and thus a change of use to non-retail can occur without planning permission providing it is a Class E use.

2.29 It is further to be noted that a new permitted development right was introduced in April 2021 allowing changes of use from Class E uses to residential without the need for planning permission (albeit subject to 'Prior Approval' and the need to satisfy certain criteria).

2.30 These planning reforms result in more flexibility and have implications for the degree to which local authorities can effectively manage the composition of uses in town centres, including with the primary shopping areas.

The Development Plan

2.31 The development plan of relevance to this Study comprises the East Herts District Plan 2018.

2.32 The District Plan sets out the planning framework for East Herts over the period 2011—2033. The relevant policies are considered below.

East Herts District Plan 2018

2.33 Policy DPS1 sets out the Council's strategy for housing, employment and retail growth. With regards to retail, the policy encourages an additional 7,100 sqm of convenience retail floorspace and 5,700 sqm of comparison retail floorspace in the District.

2.34 Paragraph 16.3.2 of the District Plan defines the hierarchy of town centres as follows:

- Principal Town Centre: Bishop’s Stortford
- Secondary Town Centre: Hertford
- Minor Town Centres: Buntingford, Sawbridgeworth and Ware

2.35 For Bishop’s Stortford, Policy BISH12 (Part I) states that new retail and leisure facilities will be focused within the following town centre locations:

(a) the Goods Yard, in accordance with Policy BISH7;

(b) the Old River Lane site, in accordance with Policy BISH8; and

(c) the Mill Site, in accordance with Policy BISH10.

2.36 Part II requires development proposals in Bishop’s Stortford to enhance the public realm and create connections between existing and new retail and leisure facilities, including the Rhodes Centre (South Mill Arts Centre).

2.37 With regards to Hertford (Policy HERT1 (Part II)) and Sawbridgeworth (Policy SAWB1 (Part II)), new retail floorspace will be directed to the town centres to maintain their vitality and viability. There is no such policy for Buntingford.

2.38 For Ware, Policy WARE1 (Part II) states that 600 sqm of retail floorspace will be delivered, primarily to the North and East of Ware (as set out in Policy WARE2) and within the town centre.

2.39 Policy RTC1 (Part I) promotes main town centre uses within the town centre boundaries as defined on the Policies Map where they contribute to maintaining the role and function, vitality and viability of the market town.

2.40 Part II says proposals will be assessed in line with the sequential approach.

2.41 Part III sets out the requirements for an impact assessment, concerning retail outside the Primary Shopping Area, and leisure, office and other developments outside of town centres, which are not in accordance with policies of the District Plan. The policy requires assessments to consider the impact of the proposal on existing, committed and planned public and private investment in the town centre or in the catchment area of the proposal; and the impact on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider area. It says the following thresholds will be applied:

- Over 1,500 sqm gross within the settlement boundary of Bishop’s Stortford
- Over 1,000 sqm gross within the settlement boundary of Hertford
- Over 500 sqm gross elsewhere

2.42 Part IV states a proposal which fails to satisfy the sequential approach or is likely to have an adverse impact (in line with Part III above) will be refused.

2.43 Policy RTC2 (Part I) designates Primary Shopping Areas for the Town Centres of Bishop’s Stortford, Hertford and Ware (as defined on the Policies Map), within which retail and other main town centre uses should be located.

2.44 Part II says the Primary Shopping Areas will contain both Primary Shopping Frontages (see Policy RTC3) and Secondary Shopping Frontages (see Policy RTC4).

2.45 Policy RTC3 identifies Use Class A1 as the preferred use within the Primary Shopping Frontages in Bishop’s Stortford, Hertford and Ware. The policy supports Use Classes A1, A2, A3, A4 and A5 provided they have an active frontage and there remains an adequate provision of A1 and A2 uses which support its role as a Primary Shopping Frontage.

2.46 Policy RTC4 supports proposals within the Secondary Shopping Frontages in Bishop’s Stortford, Buntingford, Hertford, Sawbridgeworth and Ware which are for development or changes of use to main town centre uses, or those that will support the vitality and viability of the frontage or town centre as a whole.

2.47 Policy RTC5 states that development or changes of use to main town centre uses within District Centres, Neighbourhood Centres and Local Parades will be supported in principle to secure their vitality and viability.

3. Market Context and Trends

3.1 It is important when assessing future retail and leisure development needs in East Herts to consider the market context and the likely effects of retail sector and consumer trends.

3.2 The retail and leisure sectors are dynamic; and the rate of change is fast paced. New concepts and formats continue to emerge to satisfy modern consumer demands, while long-term retail trends (such as the growth of online shopping and retailer failures/closures) are having significant implications for town centres.

3.3 The Covid-19 pandemic served to accelerate these trends and resulted in new shopping (and lifestyle) habits. The pandemic forced businesses to re-evaluate their space requirements – and not just in the retail sector. The pandemic also had long-lasting impacts on the leisure and hospitality sectors.

3.4 Amidst these structural changes, the future vitality and viability of East Herts' town centres much depends on how they adapt to reduced retailer demand; stay relevant and convenient to the consumer; and become more multi-purpose in their offer, use and experience. The place 'experience' is key, as emphasised by the aims of the Bishop's Stortford Business Improvement District ('BID') – to improve the profile and experience of the District's principal town centre for those who visit, live and work in the town.

3.5 Against this background, we provide an overview of the UK economy as well as the retail and leisure markets including the key consumer trends.

Economic Outlook

3.6 The UK economy experienced a significant shock arising from the Covid-19 pandemic and subsequent restrictions. The economic uncertainty led to lower investment with a decline in both employment and sales. Rising prices, inflation and a cost-of-living crisis emerged, and despite signs of improvement in 2024 and 2025, the Iran war has caused a further economic shock – with likely direct consequences for consumer spending and high streets.

3.7 It is to be noted that Experian's latest forecasts (from the Retail Planner Briefing Note 23 and outlined below[1]) do not account for the Iran war and the potential ramifications for the UK economy. Significantly, interest rates and inflation are now expected to be higher than assumed in the Experian forecasts. This section of the report should be read and understood in that context.

3.8 Following a mild technical recession in the second half of 2023, the UK economy grew at a rate of 1% in 2024 and 1.3% in 2025 according to Experian. Services output was the largest contributor to growth. The volume of retail sales rose for a second consecutive year, accelerating from 0.2% growth in 2024 to 1.3% in 2025, and rose by a strong 1.8% month-on-month in January 2026 primarily due to strong results in non-food (comparison retail) stores. However, in the three months to January 2026, growth was weaker at just 0.1% – with the growth in non-food stores being offset by contraction in foodstores and department stores.

3.9 Experian expects GDP growth to continue mildly in 2026 on the back of the Government's front-loaded spending plans announced in the 2025 Autumn Budget. Additionally, *retail sales growth is anticipated to continue to grow modestly, particularly in the comparison category which will see positive effects from rising real discretionary incomes*.

Retail and Leisure Spending

3.10 The latest expenditure forecasts from Experian's Retail Planner Briefing Note 23 (March 2026) for retail spending per capita (or per head) show:

- **Convenience goods:** The Covid-19 pandemic resulted in a substantial +7.2% increase in spend per head in 2020 as consumers, faced with lockdown restrictions, spent more on home cooking/food. Convenience goods spending has fallen in every year since, including -5.1% in

[1] Retail Planner Briefing Note 23, Experian (March 2026).

2023; -2.8% in 2024; and -1.5% in 2025. Experian forecasts a fall of -0.5% in 2026. There is expected to be negative 'growth' on a per head basis in the long term, at -0.2% per annum.

- **Comparison goods:** Experian's figures show a more mixed picture for comparison goods spending. The lockdown year of 2020 resulted in a -6.2% fall in expenditure per head before recovering in 2021 (+8.1%) and 2022 (+1.5%). However, spending fell considerably in 2023 (-9.4%) due to the cost-of-living crisis. Going forward, Experian expects growth to settle at approximately +2.5% per annum.

3.11 Of course, a proportion of this convenience and comparison goods expenditure is spent online. We consider this further below in terms of the impact of online shopping on 'bricks-and-mortar' stores and also, the implications for retail capacity modelling.

3.12 The leisure sector, meanwhile, discussed in paragraphs [3.24-3.32] below, experienced a significant fall in sales in 2020 due to the pandemic-induced lockdowns; yet sales recovered in 2021 and stood higher than pre-pandemic levels by 2022. Experian forecasts that leisure sales will increase by 1.5% in 2026, though growth is likely to ease as wage increases slow, inflation picks up and interest rates remain elevated.[2]

Retail Market and Trends

3.13 The retail sector endured a difficult pandemic, with multiple lockdowns and online competition resulting in the permanent closure of many shops and businesses. Coupled with a significant drop in lettings, this large-scale disruption led to increasing vacancies, with less affluent towns and shopping centres most severely impacted. Shopping centres were hit disproportionately hard due to their higher proportion of occupiers within fashion and hospitality – two of the sectors most affected by the pandemic – while retail parks generally prospered and have remained the most robust type of retail location. Smaller 'localised' centres also tended to be more resilient as more people worked from or close to home and/or chose to shop locally where possible.

3.14 The pandemic accelerated the growth of online shopping (i.e. non-store retail sales). According to UK figures published by ONS, online retail sales as a proportion of total retail sales peaked at above 30% in January 2021, before falling in the following months as restrictions were gradually lifted. In preparing the retail capacity forecasts for this Study, informed by Experian's estimates of online retail sales[3], we have assumed that online currently accounts for 5.4% of convenience goods expenditure and 26.1% of comparison goods expenditure (adjusted to account for the online retail sales derived from physical stores).

3.15 The impact of online shopping on business models and store viability has been clear to see over the last decade or so, with many major retailers either falling into administration (e.g. the Arcadia Group including BHS) or 'downsizing' their store portfolios to a smaller number of larger and/or more accessible locations offering wider catchments, free car parking and last-mile delivery potential. To that end, out of centre locations are continuing to attract retailers as they adapt to evolving consumer behaviours. M&S for example is pivoting from high streets to new 'flagship' out-of-centre department stores and/or M&S Food Halls.

3.16 Some retailers have closed their 'bricks-and-mortar' stores and transformed into online-only brands. Examples include Wilko, Cath Kidson, TM Lewin and Maplin (Wilko closed its Bishop's Stortford store in 2023). The trend is not limited to retail, either, with Thomas Cook (travel agent) and others also relaunching as online-only businesses.

3.17 The Local Data Company's ('LDC') UK-wide analysis in 2024[4] revealed a significant rise in store closures from 48,694 units in 2022 to 55,514 units in 2023. This represented a 14% year-on-year increase – the highest annual closures figure recorded in the last decade – with closures also exceeding new openings since 2014. The LDC reported that the retail vacancy rate stood circa 2% above pre-pandemic levels;

[2] Retail Planner Briefing Note 23 – Leisure, Experian (March 2026).
[3] Retail Planner Briefing Note 23, Experian (March 2026).
[4] FY2023 Retail and Leisure Trends Analysis, LDC, March 2024.

and above both the leisure vacancy rate (by +4.4%) and the overall vacancy rate (by +1.3%) signalling the particular challenges facing the retail sector.

3.18 The LDC report further added that units/stores vacant for more than three years are unlikely to return to the market. This, we consider, is a particular challenge for larger-format stores which, due to their size and often inflexible floorplates and limited store frontages, can be difficult to sub-divide or convert into viable propositions.

3.19 The more recent analysis published by CBRE[5] indicates a retail recovery, with the retail vacancy rate down in 2025. However, the report observes that the market will remain very polarised, with the more secondary locations continuing to face challenges. It says such locations with under-utilised space and lower footfall will continue to evolve and transition to alternative uses such as healthcare, leisure, and living, which could benefit the existing retail offering.

3.20 While many retailers are 'right-sizing' or even abandoning their store portfolios, others – notably the discounters such as Aldi, Lidl and B&M – continue to expand throughout the UK. Since the 2013 Study, Aldi has opened new foodstores in Bishop's Stortford (London Road) and Hertford (Gascoyne Way). Lidl has also invested in Bishop's Stortford (Stansted Road) while B&M occupies the former Poundland store in the Town Centre (South Street).

3.21 Smaller convenience store formats are benefitting from an increase in consumers shopping locally and more frequently. The pandemic-induced shift in work patterns affected the grab-and-go food market, which relies heavily on office workers and commuters; coinciding, at the time, with Pret and Costa making widespread closures in the UK. However, this market is recovering and both Pret and Costa, as well as Greggs, are expanding, which includes growing new formats (e.g. Pret drive-thrus and Costa concessions within Sainsbury's stores).

3.22 Service-based retail uses (i.e. financial services, travel agents) have seen a gradual contraction in store numbers in recent years, due to the continued growth of internet alternatives which provide convenient access to online banking and holiday price-comparison websites. This form of structural change has consequences for footfall and consumer spending, most notably in secondary town centres which are more dependent on such uses.

3.23 Other service sector uses, such as healthcare, health and beauty, are seeing growth on the high street. Beauty uses are increasingly fragmenting into specialist treatment businesses (e.g. nails, eyelashes, facials, Turkish barbers) – all physical uses that cannot be delivered online – and their presence is often a good indicator of regular, local resident footfall. NHS services are also entering high street locations, such as Lea Wharf Medical in Hertford Town Centre. An outpatients' centre which re-occupied the former Wilko store in Barnsley has been credited with improving access to healthcare and boosting town centre footfall[6].

Leisure Market and Trends

3.24 A strong leisure offer provides a reason to visit a centre other than to shop and can widen catchment areas. Increasingly, successful retailers are those who can create aspirational retail experiences that straddle leisure and entertainment. Leisure is therefore key; and can play a major role in extending dwell times and supporting the evening economy of the District's town centres.

3.25 Consumers have been spending more on leisure activities and experiences in recent years, albeit the sector has faced headwinds during the cost-of-living crisis. The leisure sector was also heavily impacted by the pandemic-induced closures and social distancing measures. For instance, cinemas and other indoor entertainment venues were forced to close from March 2020 and did not fully re-open until July 2021. The falling admissions led to a number of large cinema operators facing financial hardship. One of the casualties was Empire Cinemas in Bishop's Stortford Town Centre (Anchor Street), which permanently closed in 2023. A new independent cinema, Roxy Movies, has since opened. The District's other main cinema is BEAM in Hertford (mentioned further below).

[5] 2026 UK Real Estate Market Outlook, CBRE Research (January 2026).
[6] The Gurdian article: Future of the NHS, saviour of the high street? (16 April 2026).

3.26 Even before the pandemic, the leisure sector was challenged by the structural changes affecting retail businesses, with high street footfall in decline as consumers shopped online or at the most prime locations. To that end, the food and beverage (F&B) sector, which for several years has been subject to high levels of competition and discounting, and over-supply in some locations, has seen many 'casual dining' chains downsize across the UK (e.g. Carluccio's, Zizzi, Jamie's Italian, Prezzo).

3.27 Both the Carluccio's and Zizzi restaurants have closed in Bishop's Stortford Town Centre since the 2013 Study, although new 'destination' catering options have opened. These include the Mediterranean/Turkish restaurants, Skew and Pircio, in Bishop's Stortford Town Centre; and EAT17 (mentioned further below) which brings a food hall-style concept. Meanwhile, Fore Street in Hertford Town Centre provides a good line-up of F&B options and the centre's offer has been improved with the additions at Lea Wharf, following the redevelopment of Bircherley Green Shopping Centre in 2024.

3.28 There has been a shift in demand for experienced-based activities, as consumer preference grows for spending on experiences over material goods[7]. Research conducted by OpenTable revealed that 78% of millennials prefer spending their money at a spot offering them a unique experience. As such, more bars offering an additional entertainment element or competitive socialising (such as darts, table football, crazy golf and/or axe throwing) are appearing on the market. Examples include Flight Club and Boom Battle Bar, which has sites in Stevenage, Chelmsford and many more locations across the UK. Mulligans – with representation in Hemel Hempstead and Stevenage – offers a retro-gaming themed venue with crazy golf, shuffleboard, party cricket and more.

3.29 Food halls have emerged as a perfect fit for the modern consumer seeking a destination for leisure and gathering (i.e. not just for eating), embracing the need for convenience, authenticity and variety, often in big and iconic spaces. A smaller scale, local example is EAT17 in Bishop's Stortford Town Centre offering sushi, pizza, Greek, African and Caribbean food options and more. They act as social hubs and support smaller and local businesses, with 66% of consumers expressing a desire to purchase more goods from small-scale enterprises and particularly those with strong sustainability credentials[8].

3.30 Other experience-led concepts, which cater for a wider audience including groups and corporate events, include bungee towers, giant slides, and escape rooms. Ware and Bishop's Stortford both have escape room venues, although these are situated outside the respective town centres.

3.31 BEAM in Hertford Town Centre is an exemplar, Council-funded multi-arts venue that opened in 2024. It has a 547-seat theatre, 3 cinema screens, and a 140-seat studio, providing flexible spaces for exhibitions, fairs and makers' markets. The cinema experience, together with the venue's wider offering, reflects the trend of local cinemas becoming 'cultureplexes' and vibrant community hubs. These types of facilities – if they can be funded and delivered – are helping to underpin change in town centres as they pivot away from a sole reliance on retail and towards mixed-use, experiential places.

3.32 Health and fitness facilities, such as gyms and other well-being related activities, can help to attract a broader demographic into an area too. The sector has seen the growth of themed fitness venues. Examples include CrossFit (with representation in Hertford and Buntingford), Wunda Studio (a music-driven Pilates studio in Manchester) and MoreYoga (with over 40 yoga studios across London).

Summary

3.33 This section highlights the structural changes facing town centres and other retail locations across the UK. Consumer trends, including changes to shopping, work and lifestyle habits, have resulted in reduced footfall and an increasing number of store closures.

3.34 The future vitality and viability of town centres in East Herts much depends on how they adapt to reduced retailer demand; stay relevant and convenient to the consumer; and become more multi-purpose in their offer, use and experience. For the larger centres, addressing the retail 'over-supply' landscape; finding solutions for outdated/vacant larger-format stores (i.e. repurpose or redevelop for alternative uses); and increasing residential provision is likely to be important. Consideration should

[7] 2026 UK Real Estate Market Outlook, CBRE Research (January 2026).
[8] Food Halls of Europe, Cushman & Wakefield, 2024/25 Edition.

therefore be given to planning policies that enable the growth of a balanced mix of uses in appropriate locations.

4. Catchment Area and Market Share Analysis

4.1 This section describes the catchment area defined for the purpose of this Study and the shopping patterns (or market shares) indicated by the household survey conducted by NEMS Market Research in late January/February 2026. As part of this analysis we highlight the degree of expenditure retained within and 'leaked' from East Herts District.

Catchment Area

4.2 The catchment area sets the sampling framework for the new household survey, which provides a baseline picture of the 'survey-derived' market shares and turnovers of the main shopping destinations in East Herts. We have adopted the same catchment area and (6) zones as the 2013 Study. This is because:

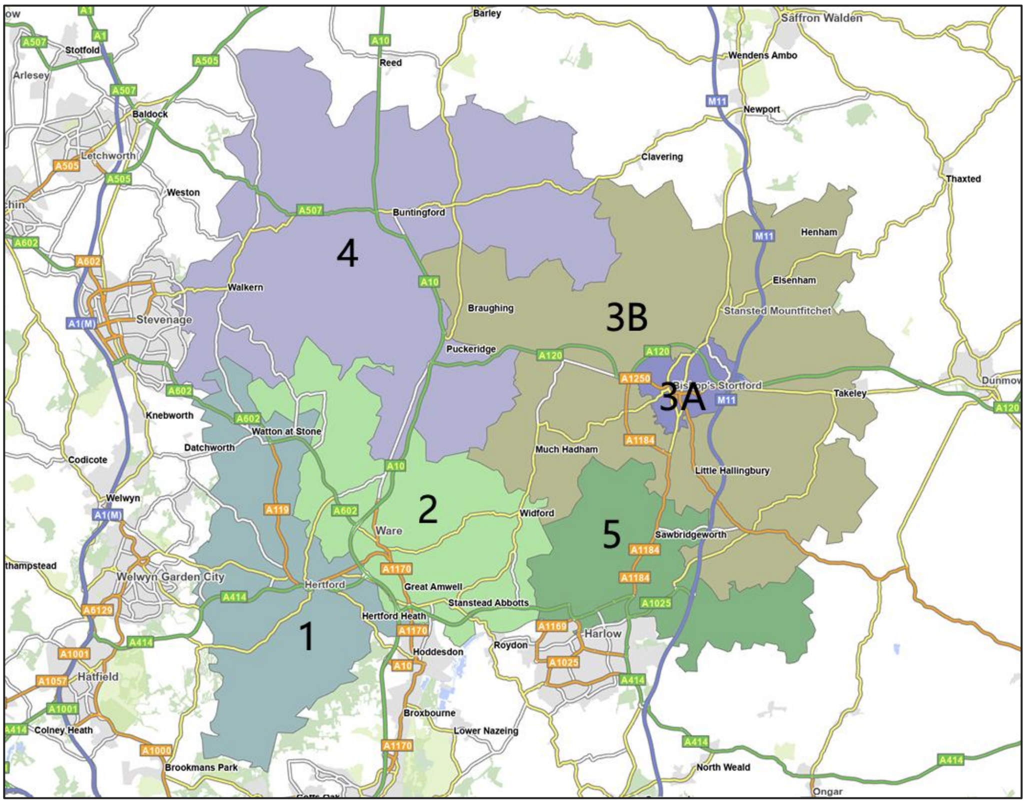
a) the previously defined catchment area and zones provide an appropriate basis on which to establish the market shares and turnovers of the District's town centres and other shopping destinations in 2026; and

b) it allows for comparative analysis of the market shares indicated by the household survey in 2013 (used for the purpose of the 2013 Study) relative to those in 2026.

4.3 This catchment area comprising 6 zones has been agreed with EHDC and is shown in Figure 4.1 below. A larger map is included at Appendix A.

4.4 The catchment area zones are based on postcode geography[9] and extend beyond the East Herts administrative boundary to reflect shopping patterns and expenditure flows.

Figure 4.1 – Map of the East Herts catchment area



[9] Refer to Table 1 at Appendix C for details of the relevant postcode sectors.

Zone 1 – Hertford	
Zone 2 – Ware	
Zone 3A - Bishop's Stortford Urban Area	
Zone 3B - Bishop's Stortford Rural Area	
Zone 4 – Buntingford	
Zone 5 - Sawbridgeworth	

4.5 More information on the new household survey is included in section 6 of this report. The household survey results are included at Appendix B.

Market Share Analysis

4.6 The 2026 household survey-derived market share (%) analysis for convenience and comparison goods shopping in the town centres and other shopping destinations is set out in the relevant Tables included at Appendix C as indicated in Figure 4.2 below.

Figure 4.2 – Shopping destinations modelled

Bishop's Stortford Town Centre
Hertford Town Centre
Buntingford Town Centre
Sawbridgeworth Town Centre
Ware Town Centre
Other Centres in East Herts (as a group)
Madford Retail Park, Hertford
Other non-central stores in East Herts (as a group)

4.7 We have modelled each of the District's main centres individually. The 'Other Centres in East Herts (as a group)' locations include the smaller designated centres of The Thorley Centre, Bishop's Park and other *district centres and parades* identified on the adopted Policies Map; and have been modelled as a group because they have relatively limited retail offers.

4.8 We have modelled Madford Retail Park separately from the other non-central stores in East Herts on the basis this site has been promoted through the call-for-sites process. The Council is keen to understand how the Retail Park is used and performs as a shopping destination.

Convenience Goods Expenditure Market Shares

4.9 The survey-derived market share (%) analysis for convenience goods shopping in Bishop's Stortford Town Centre is set out in Table 6 included at Appendix C in Table 14 for Hertford Town Centre; and in the equivalent tables for each of the other shopping destinations modelled.

4.10 Each of these tables include 'main food' and 'top-up food' shopping market shares across the 6 catchment area zones, which are then merged into a weighted average (i.e. 70% for main food and 30% for top-up food) reflecting the estimated proportion of expenditure accounted for by each type of convenience goods shopping.

4.11 The weighted average convenience goods expenditure market shares for East Herts District's town centres and other shopping destinations are set out in Figure 4.3 below on a zone-by-zone basis. This shows, for example, Bishop's Stortford Town Centre secures 1% of convenience goods expenditure available in Zone 2; 43% of expenditure in Zone 3A; 20% of expenditure in Zone 3B; etc.

Figure 4.3 – Convenience goods expenditure market shares by zone

	Zone 1	Zone 2	Zone 3A	Zone 3B	Zone 4	Zone 5	*Table no.*
Bishop's Stortford Town Centre	-	1%	**43%**	**20%**	4%	4%	*6*
Hertford Town Centre	**3%**	-	-	1%	-	2%	*14*
Buntingford Town Centre	-	-	-	1%	**19%**	-	*22*
Sawbridgeworth Town Centre	-	-	-	-	-	**3%**	*30*
Ware Town Centre	-	**47%**	-	2%	6%	-	*38*
Other Centres in East Herts	2%	2%	28%	29%	5%	3%	*46*
Madford Retail Park, Hertford	-	-	-	-	-	-	*54*
Other non-central stores in East Herts	76%	34%	19%	24%	10%	13%	*63*

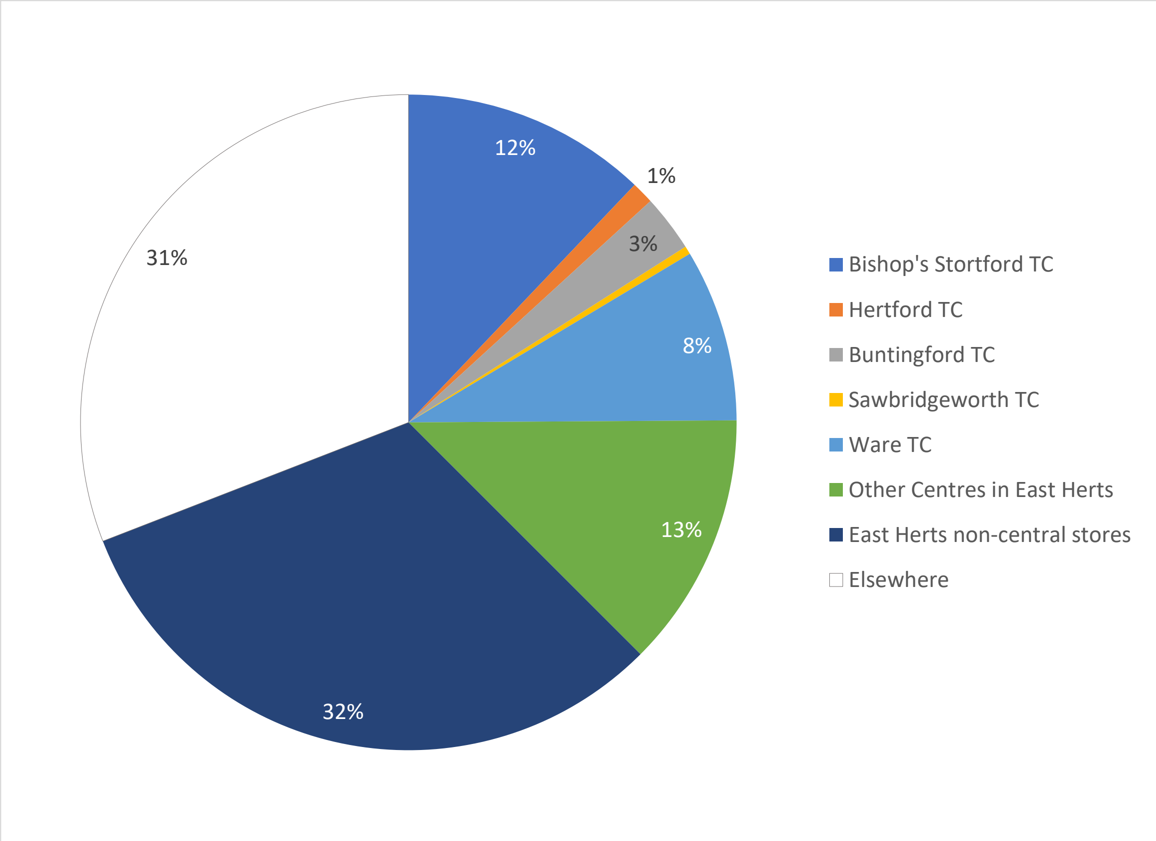
Source:
Tables at Appendix C as indicated right.
Notes:
All market shares (%) rounded up to the nearest percentage point.
Where appropriate, the market shares assessed to represent the primary catchment area of each destination are shown in bold.

4.12 From these shopping patterns, the key findings are:

- Bishop's Stortford Town Centre secures a substantial market share of convenience goods expenditure from the town's urban areas i.e. Zone 3A (43%) as well as a notable market share from its rural hinterland i.e. Zone 3B (20%). This can be attributed to the attractive foodstore line-up within the Town Centre including Sainsbury's, M&S Food and Waitrose.
- Ware Town Centre comprising a large Tesco store retains a high market share of convenience goods expenditure from its 'home' zone i.e. Zone 2 (47%). Buntingford Town Centre also secures a notable market share from its home zone i.e. Zone 4 (19%), principally due to the Co-op and Sainsbury's Local stores (and Budgens to a lesser degree).
- The convenience goods expenditure market shares secured by Hertford Town Centre are relatively low on the basis the town's main foodstore offer, aside from M&S Food, is situated outside the centre (namely Aldi, Sainsbury's and Tesco – which we have modelled as Other non-central stores in East Herts).
- Other non-central stores in East Herts – including the Hertford foodstores identified previously, Aldi and Lidl in Bishop's Stortford, Asda in Ware, and Co-op in Sawbridgeworth – are popular destinations for convenience goods shopping, securing a high market share from Zones 1 (Hertford), 2 (Ware) and 4 (Buntingford) in particular.
- Co-op in Sawbridgeworth is the town's main foodstore and is situated outside the town centre boundary as defined on the District Plan Policies Map (hence we have included this foodstore as one of the 'non-central' stores in East Herts). Sawbridgeworth Town Centre retains a relatively low market share of convenience goods expenditure from Zone 5 (Sawbridgeworth) (3%) given existing provision is limited to Morrisons Daily and a limited range of small-scale independent convenience goods shops.
- Meanwhile, Other Centres in East Herts secure substantial market shares of convenience goods expenditure from Zone 3 and 4 in particular. This reflects existing district centre foodstore provision in Bishop's Stortford (namely Tesco at Bishops Park Centre and Sainsbury's at Thorley Lane East).

4.13 Figure 4.4 below presents the overall catchment area market share analysis for East Herts District's convenience goods shops and stores. It shows the District is retaining more than two-thirds of total catchment area expenditure on convenience goods. Non-central stores in East Herts secure almost one-third (31.6%) of convenience goods sales within the catchment area. Almost the same proportion of convenience goods expenditure (30.9%) is spent elsewhere, i.e. 'leakage' to locations outside the District (as considered further below). Other Centres in East Herts secure an overall market share of 12.6%, while Bishop's Stortford Town Centre and Ware Town Centre retain 12.1% and 8.5% respectively.

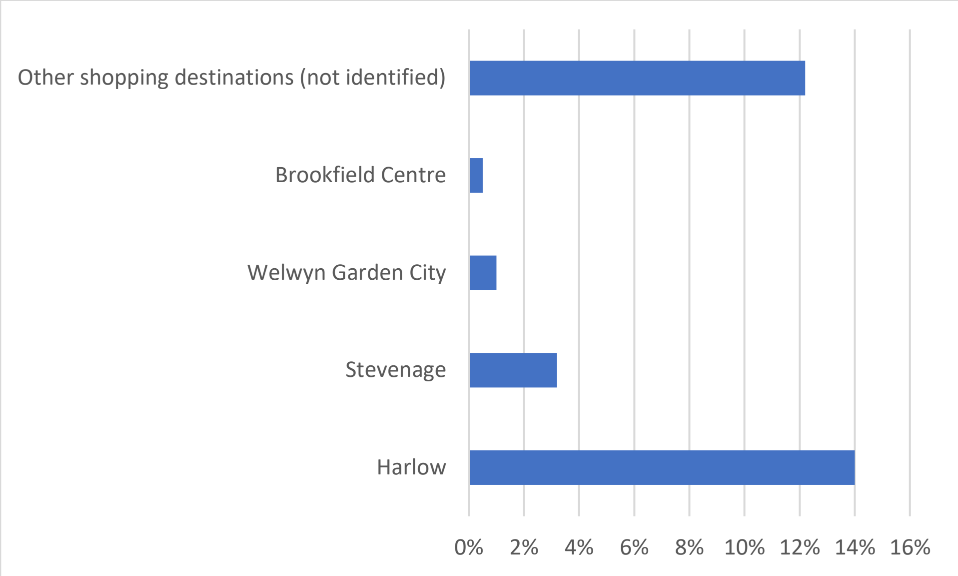
Figure 4.4 – Overall convenience goods market shares



Source: Tables 13, 21, 29, 37, 45, 53 and 71 at Appendix C.
Notes: Percentages rounded to the nearest 1%.

4.14 We have sought to establish the market shares of convenience goods expenditure 'leaked' to competing major towns and retail parks outside East Herts. These form part of the 'Elsewhere' category in the previous analysis. Accordingly, Figure 4.5 below indicates that Harlow is the dominant competing location, securing a 14% market share of catchment area expenditure on convenience goods. It is to be noted that Harlow has a full and wide ranging foodstore line-up, including multiple representation from Tesco, Asda, Sainsbury's, Aldi and Lidl.

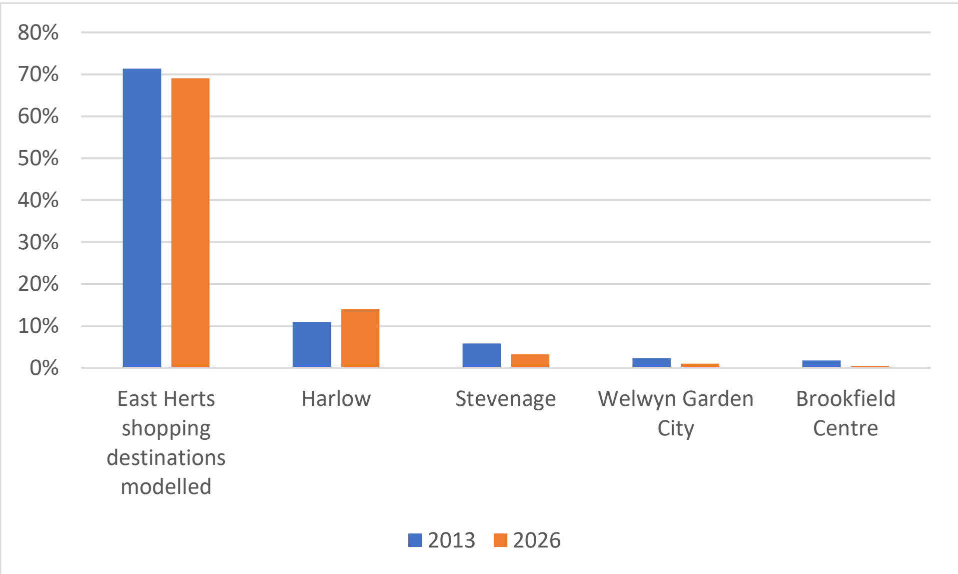
Figure 4.5 – Convenience goods market shares 'leaked' from East Herts



Source: Market shares derived from the 2026 household survey results included at Appendix B (in particular Questions 1 and 5 for convenience goods).

4.15 Figure 4.6 below shows the changes in convenience goods expenditure retention (i.e. within East Herts District) and leakage (i.e. to the main competing shopping destinations outside the District) between 2013 and 2026. The findings suggest a relatively slight (-2.3%) fall in the District's market share. Harlow has increased its catchment area market share from about 11% to 14% while Stevenage has seen a slight fall as well.

Figure 4.6 – Changes in convenience goods market shares (2013-2026)



Comparison Goods Expenditure Market Shares

4.16 The survey-derived market share (%) analysis for the various categories of comparison goods[10] shopping in Bishop's Stortford Town Centre is set out in Table 7 included at Appendix C; in Table 15 for Hertford Town Centre; and in the equivalent tables for each of the other shopping destinations modelled.

4.17 Figure 4.7 below sets out the weighted average comparison goods expenditure market shares on a zone-by-zone basis. This shows, for example, Bishop's Stortford Town Centre secures 2% of comparison goods expenditure available in Zone 2; 49% of expenditure in Zone 3A; 41% of expenditure in Zone 3B; etc.

Figure 4.7 – Comparison goods expenditure market shares by zone

	Zone 1	Zone 2	Zone 3A	Zone 3B	Zone 4	Zone 5	*Table no.*
Bishop's Stortford Town Centre	-	2%	**49%**	**41%**	8%	8%	*7*
Hertford Town Centre	**21%**	4%	-	-	2%	-	*15*
Buntingford Town Centre	-	-	2%	-	**7%**	1%	*23*
Sawbridgeworth Town Centre	-	-	-	-	-	**10%**	*31*
Ware Town Centre	2%	**19%**	-	-	4%	1%	*39*
Other Centres in East Herts	-	-	1%	2%	-	-	*47*
Madford Retail Park, Hertford	**6%**	**5%**	-	1%	2%	1%	*55*
Other non-central stores in East Herts	6%	5%	5%	3%	1%	-	*64*

Source:
Tables at Appendix C as indicated right.
Notes:
All market shares (%) rounded up to the nearest percentage point.
Where appropriate, the market shares assessed to represent the primary catchment area of each destination are shown in bold.

4.18 From these comparison goods shopping patterns, the key findings are:

- The District's Principal Town Centre, Bishop's Stortford, retains the highest market share of comparison goods expenditure from Zones 3A (49%) and 3B (41%) and limited catchment area market share beyond these zones.
- Hertford Town Centre secures a 21% market share of comparison goods expenditure from its home zone i.e. Zone 1; and Ware Town Centre (including the Tesco store) secures a 19% market share from its home zone i.e. Zone 2.
- The comparison goods expenditure market shares retained by the other Town Centres are lower, reflecting their more limited comparison goods retail offers, and are predominantly

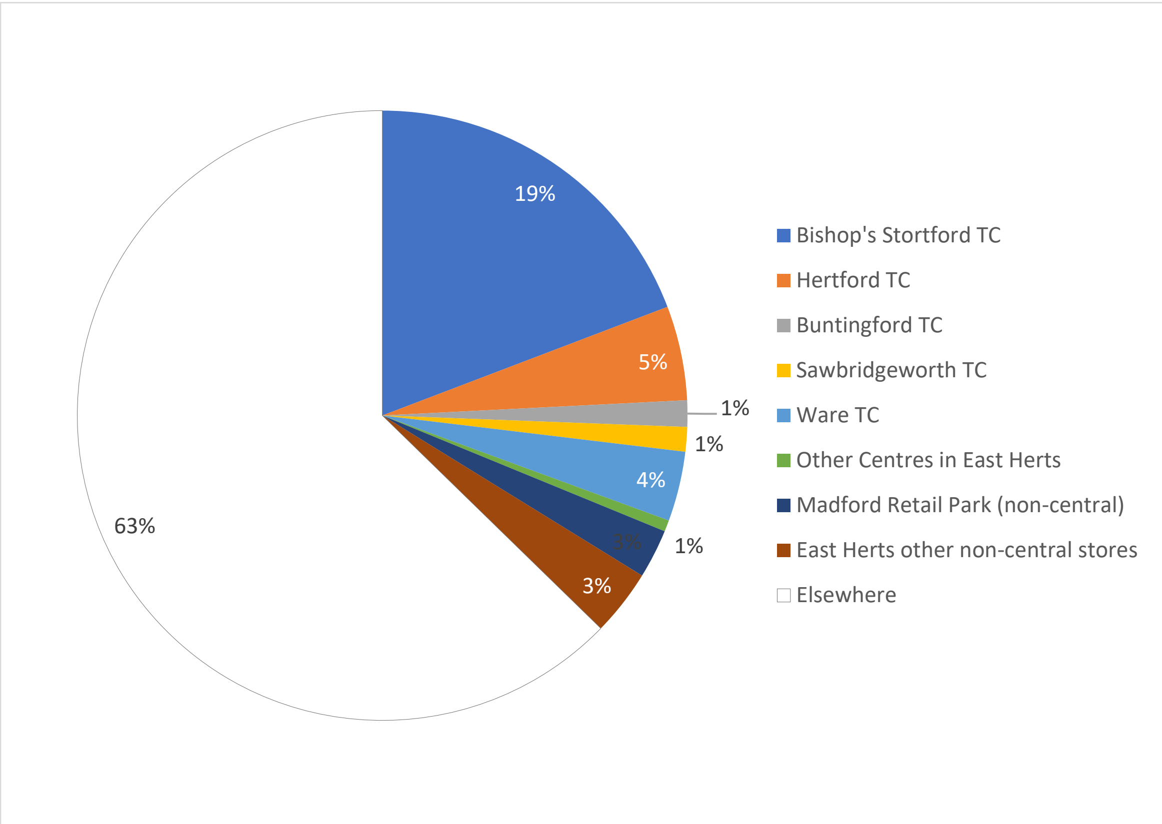
[10] The household survey comprised questions on the 8 main groups of comparison goods expenditure, including clothing and footwear; furniture and floor coverings; household textiles; household appliances; audio-visual equipment; hardware, DIY and garden products; chemist, medical and beauty goods; and all other comparison goods (e.g. books, jewellery, watches).

derived from their home zones (e.g. Sawbridgeworth Town Centre secures a market share of 10% from Zone 5 only).

- Madford Retail Park – including Matalan, Pets at Home and Wickes – principally attracts market shares of comparison goods expenditure from the Hertford and Ware zones (6% and 5% respectively).
- Meanwhile, Other non-central stores in East Herts – principally comprising edge and out of centre foodstores, The Range and Wickes in Bishop's Stortford, and garden centres – secure reasonably limited market shares of comparison goods expenditure from the catchment area.

4.19 Figure 4.8 below presents the overall catchment area market shares for East Herts District's comparison goods shops and stores in each of the town centres and other shopping destinations. The analysis shows the District retains more than a third (37.3%) of total catchment area expenditure on comparison goods, with Bishop's Stortford Town Centre being the main shopping destination in this respect (with a 19.2% market share). Each of the District's other shopping destinations are securing a market share of 5% (namely Hertford Town Centre) or lower. This includes Madford Retail Park with a 2.6% market share. The result is that some 62.7% of comparison goods expenditure available within the catchment area is being leaked to locations elsewhere.

Figure 4.8 – Overall comparison goods market shares

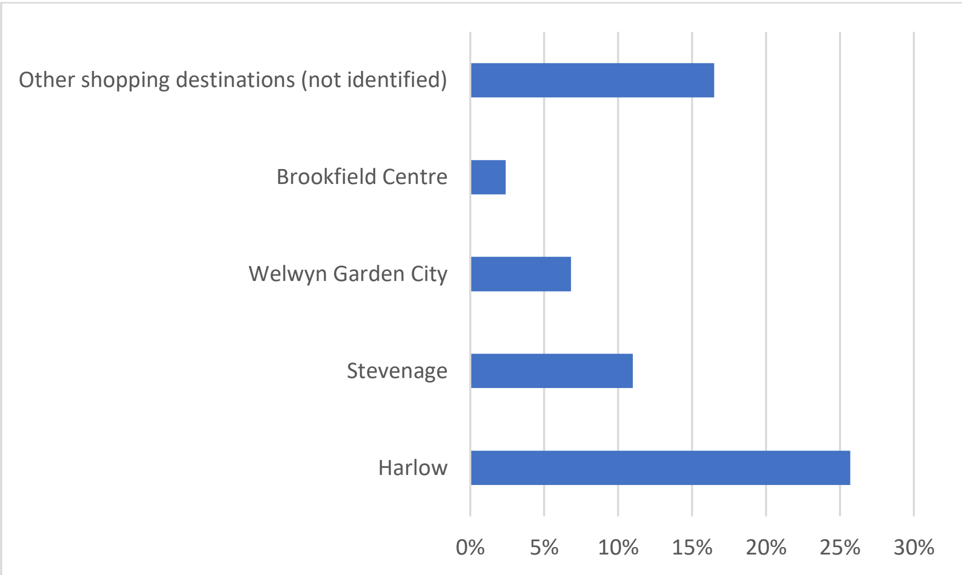


Source: Tables 13, 21, 29, 37, 45, 53 and 71 at Appendix C.
Notes: Percentages rounded to the nearest 1%.

4.20 As with the convenience goods expenditure market shares, we have considered (see Figure 4.9 below) the market shares of comparison goods expenditure 'leaked' to competing major towns and retail parks outside East Herts. These form part of the 'Elsewhere' category in the previous analysis, which accounts for 62.7% of total catchment area expenditure on comparison goods.

4.21 To that end, Harlow is the dominant competing destination for comparison goods shopping, securing about a quarter (25.7%) of total expenditure available within the catchment area. This is perhaps to be expected given its strong retail park/warehouse offering (e.g. B&M, Currys, IKEA, Next Home, Smyths Toys, Dunelm, Sports Direct) in addition to the shopping attractions in Harlow Town Centre (e.g. Primark, TK Maxx, Next, Clarks, JD Sports); and recognising its proximity and accessibility to the residents of East Herts, particularly in the southern part of the District. Stevenage is also a notable competing location for comparison goods expenditure, securing a catchment area market share of 11% while Welwyn Garden City attracts 6.8% (principally attributed to the town's John Lewis). We would point out that the 'other' shopping destinations (not identified) category includes Cambridge City Centre which has a John Lewis department store and an all-round strong comparison retail offer.

Figure 4.9 – Overall comparison goods market shares 'leaked' from East Herts

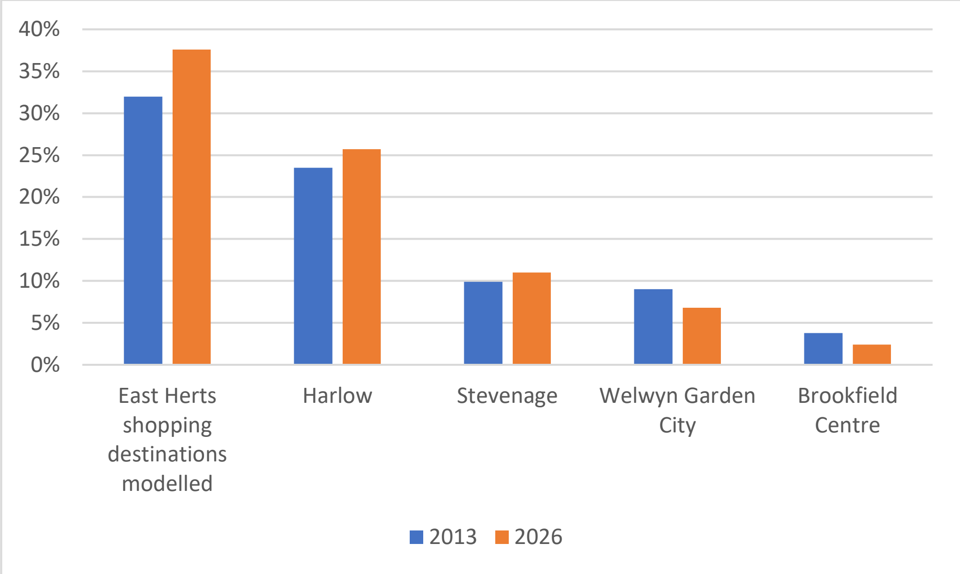


Source: Market shares derived from the 2026 household survey results included at Appendix B (in particular Questions 17-24 for comparison goods).

4.22 Figure 4.10 below shows the changes in comparison goods expenditure market shares between 2013 and 2026. Encouragingly, East Herts has seen its catchment area market share rise from 32% to 37.6% over the period. However, it is to be noted that competing locations in Harlow and Stevenage have also increased their market share, while Welwyn Garden City and Brookfield Centre have seen a fall. The increase observed for East Herts, whilst positive overall, is in our view perhaps a reflection of the 'shopping locally' trend as opposed to any notable improvement in its comparison retail offer.

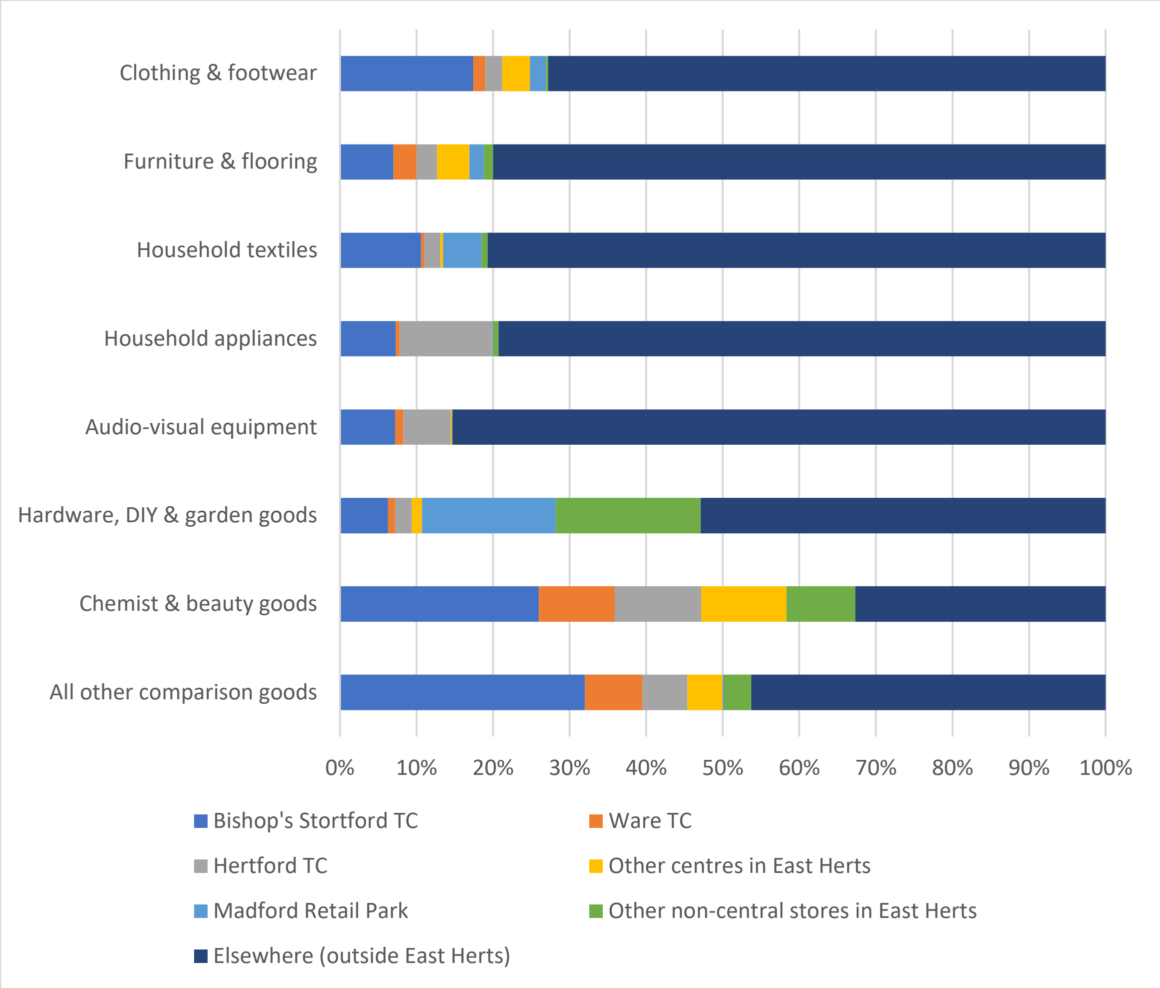
4.23 Although not presented in the analysis (Figure 4.10) below, Madford Retail Park has increased its catchment area market share from just 0.6% in 2013 to 2.6% in 2026. Despite this observation, we are of the opinion that the 2% market share increase is not material and is not a signal that Madford Retail Park has become notably more attractive as a shopping destination. The comparison retail offer is unchanged since 2013.

Figure 4.10 – Changes in comparison goods market shares (2013-2026)



4.24 An overview of the market shares by type of comparison goods (comprising the 8 identified comparison goods sub-categories) is presented in Figure 4.11 below. For the purpose of this analysis, we have focused on the District's main destinations for comparison goods shopping (i.e. we have excluded Buntingford and Sawbridgeworth Town Centres). We have further identified the market shares attracted elsewhere (including the competing shopping destinations outside East Herts District).

Figure 4.11 – Comparison goods market shares by goods category



4.25 Our analysis shows that:

- Bishop's Stortford Town Centre performs relatively well in terms of attracting catchment area expenditure on the 'all other comparison goods' sub-category (which includes personal and luxury goods) (32%) as well as chemist and beauty goods (26%). The centre also attracts notable market shares on clothing and footwear (17%) and household textiles (11%).

- Bishop's Stortford Town Centre out-performs all other shopping destinations in East Herts with respect to market shares of catchment area expenditure on 6 of the 8 comparison goods sub-categories, namely clothing and footwear; furniture and flooring; household textiles; audio-visual equipment; chemist and beauty goods; and the 'all other comparison goods' sub-category.

- Hertford Town Centre's strongest comparison goods sub-category in terms of catchment area market shares is household appliances (12%) (out-performing Bishop's Stortford Town Centre and all other shopping destinations in East Herts) followed by chemist and beauty goods (11%), which is also Ware Town Centre's strongest sub-category (10%).

- Madford Retail Park secures a relatively high market share of catchment area expenditure on hardware, DIY and garden products (18%) owing to the large Wickes store. The retail park further attracts a 5% market share on household textiles and a 2% market share on clothing and footwear.

- Competing locations outside the District – which form part of the 'Elsewhere' category in Figure 4.11 above – are largely dominant with regards to catchment area expenditure on audio-visual equipment (85%), household textiles (81%), furniture and flooring (80%), household appliances (79%) and clothing and footwear (73%). Put simply, East Herts' retail offer is not well served by these types of shops and stores.

Demographic-Based Comparison Goods Shopping Trends

4.26 Based on the market share data available, we note the following trends:

- The highest proportion of Bishop's Stortford Town Centre's market share of expenditure on clothing and footwear is derived from those aged over 55 years (15% of respondents in this age group do most of their clothing and footwear shopping in the Town Centre compared with 3% aged 35-54 and 5% aged 18-34).
- The catchment area's younger age groups i.e. 18-34 years look more towards Harlow Town Centre (13%) to fulfil their clothing and footwear shopping needs. This age group is also more likely to buy clothing and footwear from the internet (68%), compared with 61% aged 35-54 and 35% aged over 55 years.
- Shopping trends for chemist/beauty goods and personal/luxury goods follow a similar pattern, with Bishop's Stortford Town Centre more popular amongst respondents aged over 55 years and the younger, perhaps more mobile 18-54 age band looking more towards Harlow and other shopping destinations outside East Herts.
- The market share data suggests Madford Retail Park is more widely used by those aged 54 years and below, particularly for hardware, DIY and garden products, household textiles, and clothing and footwear.

5. Town Centre Healthchecks / Place Reviews

Introduction

5.1 The aim of this section is to assess the health and vitality of the District's five town centres using a variety of bespoke research workstreams. These include a survey of random businesses handed out face to face in the centres, with completed surveys being picked up later in the same day. The results of the business survey are drawn out in this section, and contained in Appendix D.

5.2 A similar survey was also undertaken with stakeholders across the towns, including elected (Town and District) members, EHDC officers, local business / trade associations, civic groups and the BID plus Jacksons Square Manager in Bishop's Stortford. In order to protect individual confidentiality, the aspirations and views of stakeholders are reported generally across the five healthcheck sections.

5.3 A survey of residents was undertaken to inform the market share and capacity assessments identified later in the report. The survey included some questions to inform these healthchecks in regards why consumers visit different centres; changes to their frequency of use of centres; and also their general satisfaction with their main choice of place to shop. The detailed findings of this research is contained in sections 4 and 7 of this report (and detailed in Appendix B); however, selected highlights have been extracted and used in this section as part of the healthchecks / place reviews.

5.4 Finally, a review of each place was undertaken from the perspective of the consumer by TRG consultants, in regards the quality of environment, ease of shopping, quality / mix / choice of offer available, ease of movement, etc. Whilst undertaking these assessments, we also noted which units were vacant on a street-by-street basis across each of the five town centres, as well as where peak footfall levels were observed during our visits.

Bishop's Stortford

Overview

5.5 Bishop's Stortford is the principal town in East Herts and is both a market town and civil parish. The town has a rich history with evidence of pre-Roman settlement, as well as being a centre of both agricultural activity and specialist manufacturing (tanneries). The town expanded greatly during the industrial revolution, given its strategic location and excellent access.

5.6 The town has a great and dynamic mix of retail, food & beverage and service businesses, including representations from several leading national multiple businesses, boosted by many excellent independent businesses.

5.7 The town centre broadly follows a north-south axis, with the core focus of commercial and retail activity (where most shops are located) being South / Potter / Market Streets. Historically, the main banks and building societies were clustered on North Street, although these have now mostly vacated the street (as is common in many high streets across the county and country).

5.8 In regard to the primary research for this project, 108 businesses took part in our business survey (including retail, catering and service businesses), seven stakeholders completed surveys and just over 280 residents completed household surveys in the Bishop's Stortford combined residential (or catchment) zones.

Accessibility & Environment

5.9 Bishop's Stortford is located at the confluence of the M11 near to Stansted Airport, and the A120 which links the A10 (just south of Buntingford) through to Colchester and beyond through to Harwich on the East Coast. As such, the town has excellent accessibility including extensive road linkages both north-south as well as east-west.

5.10 The town centre offers a wide variety of car parking options, including Jackson Square Shopping Centre (708 spaces), Northgate End Multistorey (482), Bishop's Stortford Station Car Park (401), Link Road

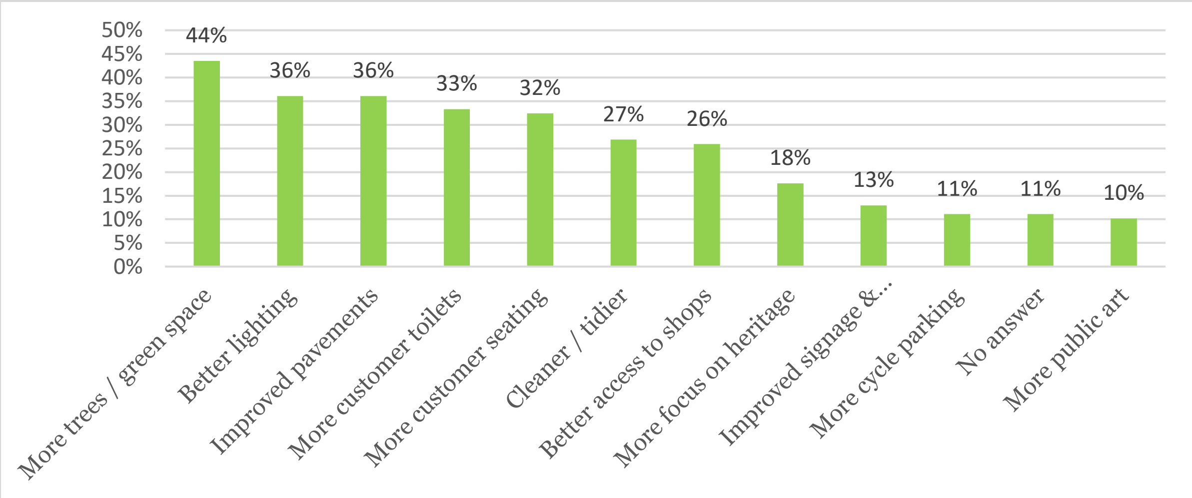
(100), Apton Road Car Park (86), Basbow Lane (71) and Crown Terrace (65). Waitrose also offers a further 180 spaces for shoppers (up to 2 hours) providing they spend at least £10.

5.11 Whilst there is secure cycle parking available at the station (up to 240 bikes) as well as in the Anchor St Car Park (50), a couple of stakeholders felt that secure parking for bicycles in the town centre is insufficient and limited in availability, and this is likely to be putting off cyclists with high value bikes from visiting and spending time in the town centre. Additionally, proposals for improvements to cycling infrastructure have been proposed as part of the Old River Lane development to the north of the town centre, including some cycle parking facilities.

5.12 The town centre benefits from a station on the Greater Anglia Main Line, including links to Stansted Airport, with circa 3m passenger journeys each year.

5.13 We understand that the Council is keen to improve the air quality and environment around the Hockerill Junction Air Quality Management Area (AQMA), given concerns about the existing air quality and in particular the high levels of nitrogen in the air caused by the amount of traffic and congestion in the area. This could be through junction improvements in this area, which could impact the way in which people travel to the town centre in the future.

5.14 Businesses told us they would like to see the following the improvements to the public realm of Bishop's Stortford Town Centre:

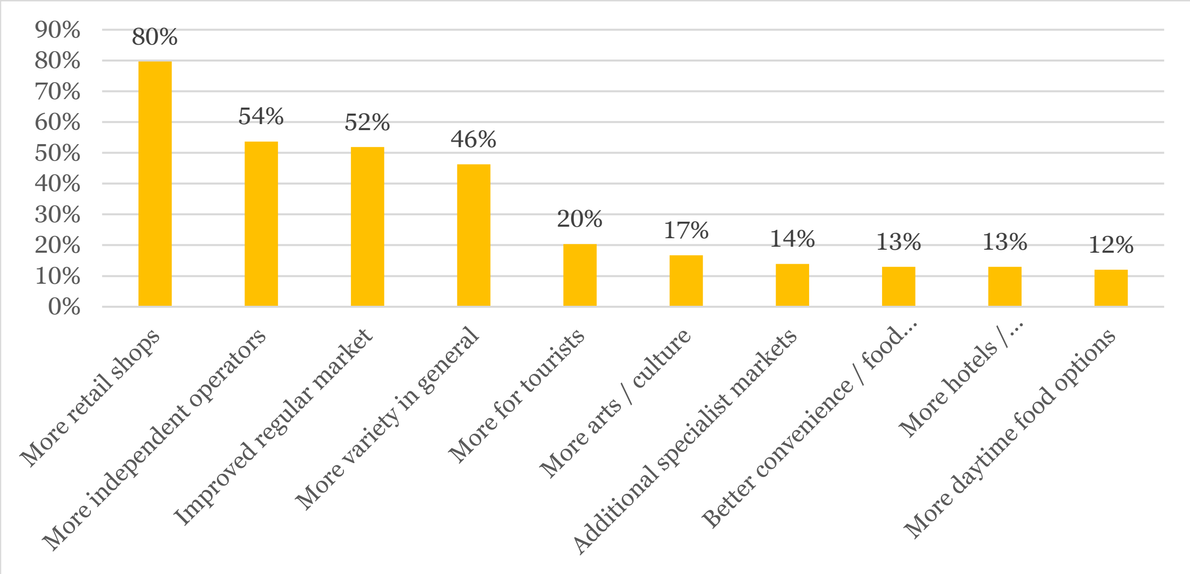


5.15 As can be seen, most improvements wanted by businesses relate to a cleaner, greener and easier to use offer and experience for shoppers.

Diversity of Uses and Retailer Representation

5.16 In the sample of 108 businesses that completed our survey, 56% were retail shops, 19% cafe / restaurant, 11% retail services and 7% financial services.

5.17 In regards improvements wanted to the mix / offer, businesses told us they want to see:



5.18 As can be seen, businesses want a better version of what there is in Bishop's Stortford at the moment, with more choice and an extended offer. They also want a more unique and memorable offer, providing more reasons for customers to visit the town centre.

5.19 The town centre offers shoppers and visitors outlets from many leading multiple operators, including Mark's & Spencer, Next, H&M, TK Maxx, New Look, Waterstones, B&M Bargains, Boots, Superdrug, Sainsburys and Waitrose.

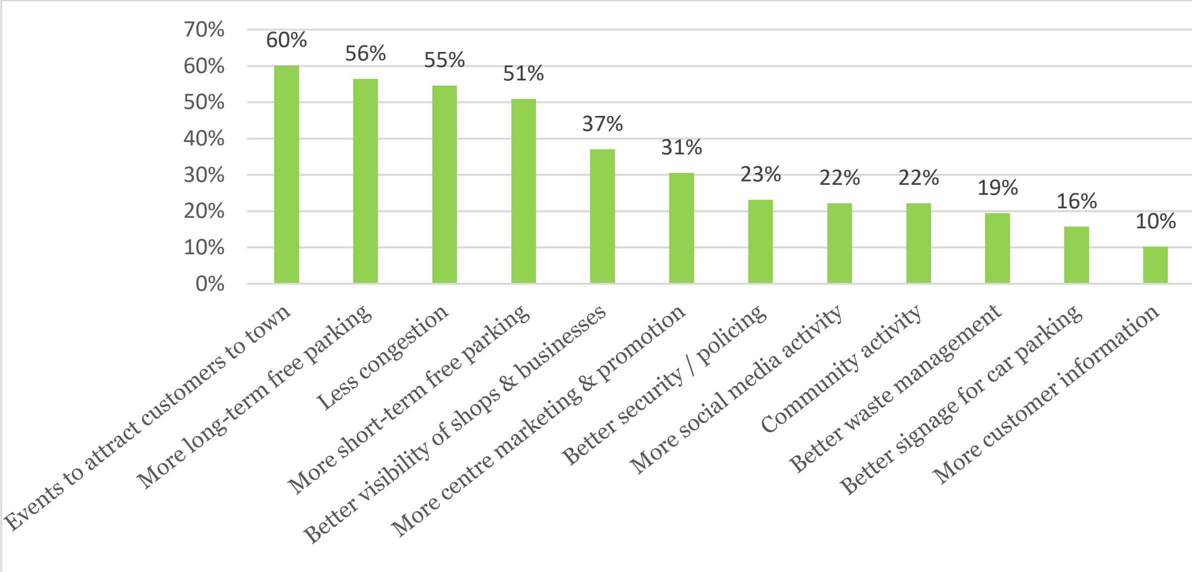
5.20 The food offer is also strong for both daytime and evening, with an innovative new wave food hall (EAT17) in the former Store 21 unit on the high street. This concept is evidently popular with consumers of all ages in Bishop's Stortford.

5.21 The main barriers for entry into Bishop's Stortford Town Centre primarily relate to the lack of small – medium sized units, as they often quickly get re-occupied, especially in the centre of town. It is likely there is demand for additional gym facilities / complementary health offers, although again the lack of affordable medium – large units is preventing this from materialising.

5.22 Since the last healthchecks were undertaken in 2013, the major changes to Bishop's Stortford retail offer included the reconfiguration of Jackson Square (including the new TK Maxx store), the proposed housing-led development of the Goods Yard and the proposed mixed use Old River Lane development.

Customer Experience

5.23 Businesses who took part in the survey were also asked their views on potential improvements to the customer experience, and the responses included:



5.24 Businesses clearly want more activities that will drive footfall; improved parking (more long term paid for parking as well as free short-term parking, as well as better signage for it); an easier to use offer; improved marketing; and better security.

5.25 We would observe also that much of the Bishop's Stortford Town Centre environment is attractive, appealing, well managed and kept. It is an enjoyable place to shop, eat and socialise. However, businesses want it to be even better.

5.26 Visible vacancies are low and mainly confined to peripheral areas of the town centre. Many vacant units have either recently become re-occupied or are currently being fitted out. Whilst there are a number of vacant units in Jackson Square Shopping Centre, these would mainly appear to be due to national multiple chain failures rather than a local trading issue.

5.27 North Street does have a number of long-term vacant units, and these are mostly as a result of either banks and building societies closing their units (as is common across the country), or multiple operated chain food and beverage failures (e.g. Giggling Squid and Franca Manca). This has the unfortunate effect of reducing awareness of and footfall past the appealing Florence Walk mini shopping arcade.

Customer Behaviour & Views

5.28 Bishop's Stortford achieves a weekly visit from 31% of the total household survey area, a larger response than any other centre. That said, 43% of the total area visit it less than once a year or not at all. The main source of regular customers are from Zones 3A and 3B. 79% of respondents in Zone 3A visit it weekly and 63% of those in Zone 3B do the same. Zones 1,2,4 and 5 have more people who visit very infrequently than those who visit regularly.

5.29 Bishop's Stortford is one of the area's dominant centres: it is the centre most visited by 95% of Zone 3A, 88% of Zone 3B, with further most visited levels of 38% and 14% for Zones 5 and 4.

5.30 Modes of travel are split into mainly two aspects to reflect geography of areas, Zone 3A is 38% car borne, and 55% walk-in. Zone 3B is 86% car borne and 9% walk-in, a further 6% use the bus.

5.31 The visit duration for Bishop's Stortford reflects its role as the major centre in the area. The two zones have slightly different duration mixes, based on their geography / distance from the town centre. The dominant stay duration is 1-2 hours, with 38% of Zone 3A and 58% of Zone 3B residents staying this long. The closer zone (3A) then has 23% staying less than 30 minutes and 21% staying 30-59 minutes.

A further 14% of Zone 3a and 18% of Zone 3B are staying for 2-3 hours, reflecting the variety of offer available in the town.

5.32 Around 36% of respondents indicated they used the town's markets, with the weekly (Thursday and or Saturday) market achieving either 81% or 74% attendance depending on the Zone (3A then 3B). The monthly farmers / craft markets also had good use numbers of 56% and 47% from both zones.

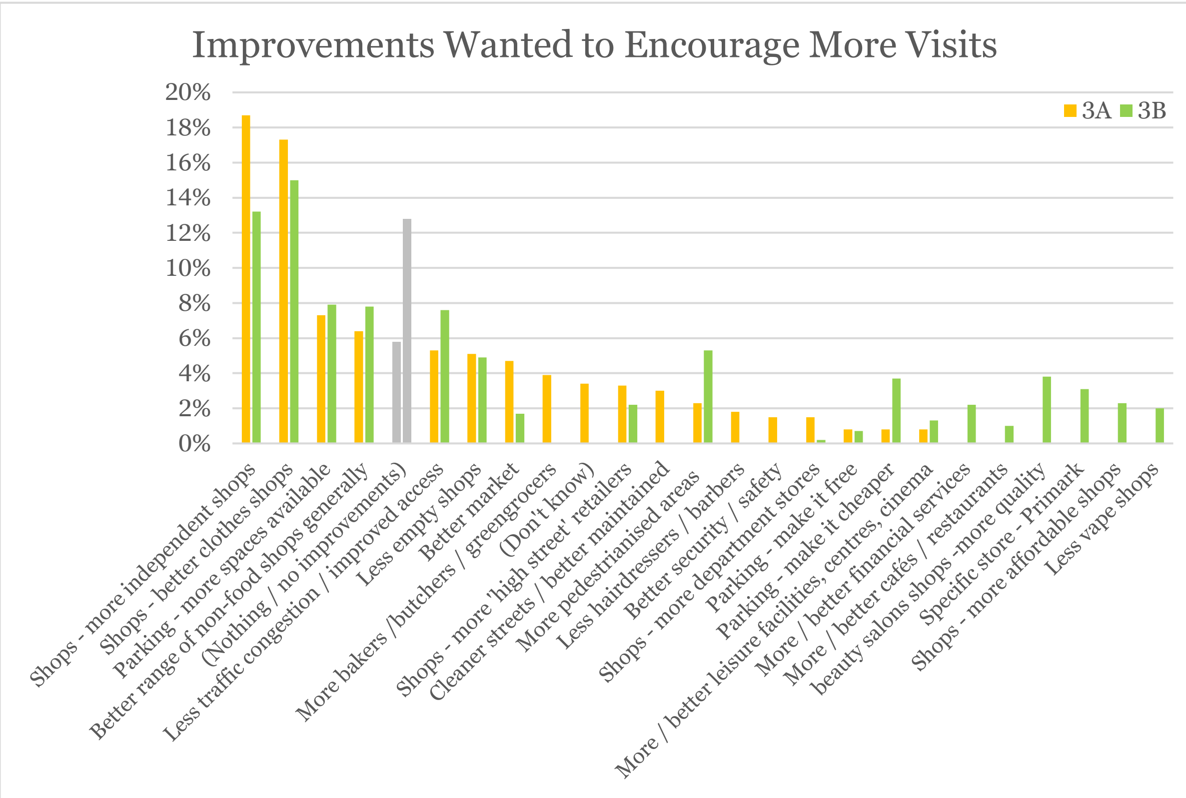
5.33 In terms of the improvements wanted to markets, these included (with Zone 3A & 3B percentages listed separately):

- More fruit and veg stalls (29% and 13%)
- More non-food stalls (14% and 18%)
- More clothing stalls (7% and 18%)
- More stalls in general (12%) - Zone 3A only
- More farmers markets (9%) - Zone 3A only
- No improvements (13% and 15%).

5.34 The main likes about the centre are that it is 'close to home' 36% in Zone A and 16% Zone B. The café / restaurant offer is popular, 14% of Zone 3A and 24% in Zone 3B. Other than the independents being mentioned by 8% of Zone 3A (2% of Zone 3B), the traditional /quaint and familiarity of centre achieved 10% from Zone 3B and 7% from Zone 3A. There are a long list of other likes, but all achieving well below 4%, if at all. Only 15% of Zone 3A and 8% of Zone 3B said 'nothing'. Convenience, environment and familiarity lead the way. On the offer side it is the food and beverage offer that respondents like.

5.35 As can be seen in the graph below, improvements wanted to the centre include both improved offer and improved facilities / environment. For brevity we have listed both the Zone 3A and Zone 3B figures beside each improvement area.

- More clothing (17% and 15%), more independent shops (19% and 13%), more non-food shops (6% and 8%), improved market (5%)
- More parking (7% and 8%), reduced traffic / improved access (5% and 8%), more pedestrianised area (5%)
- Fewer vacant units (5% and 5%), nothing (6% and 13%).



5.36 In regard to going out for a drink, the Bishop's Stortford respondents show that circa 57% to 64% (Zones 3A and 3B) go out at least once a month (combining the weekly, fortnightly and monthly responses together). In terms of where they choose to visit, this is overwhelmingly Bishop's Stortford Town Centre, 83% and 62% for Zones 3A and 3B. Outside of this, the next highest visit location is central London / West End at 4% or 8%.

5.37 The numbers that eat out at least monthly are higher at 68% and 82% for Zones 3A and 3B. The locations of choice are as per drinking, 81% and 63% choose Bishop's Stortford Town Centre, and 3% or 8% choose London / West End.

Indicators of Health & Vitality

5.38 Businesses told us that 40% were trading in line with last year in regards customer numbers, with 33% decreasing and 23% increasing. This is a reasonable result, with most businesses in line with last year's customer numbers.

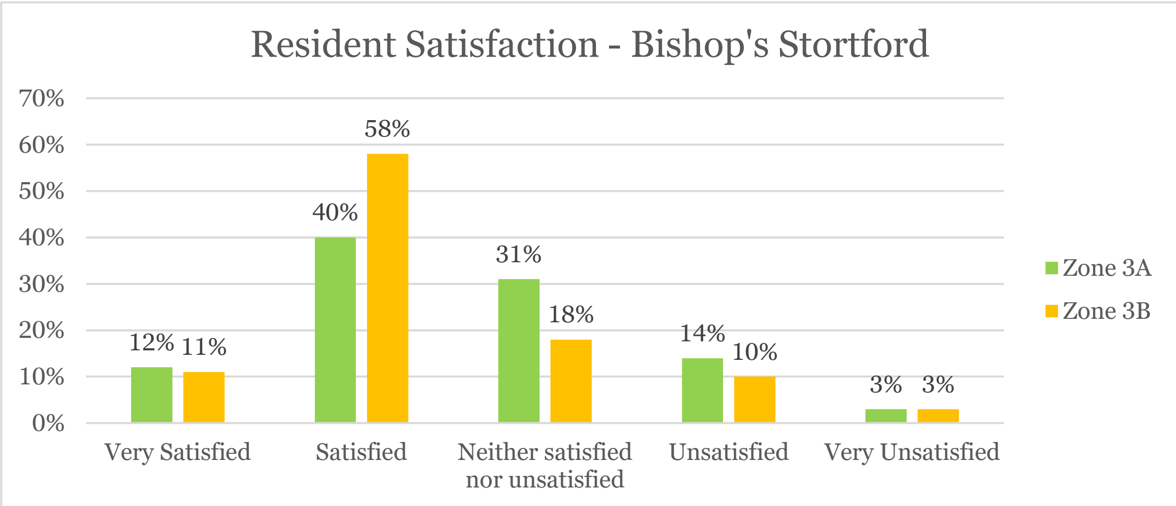
5.39 In regard to sales trend, 32% are reporting current sales as being in line with last year sales, 31% decreasing and 27% increasing. Again, a reasonable result in the current economy, being negatively affected by global pressures.

5.40 When asked how satisfied they are with Bishop's Stortford as a place to trade, 46% said they are satisfied, 36% neither satisfied / nor dissatisfied and only 20% dissatisfied. In regards future trading prospects, 48% are optimistic, 27% neither / nor and 24% pessimistic.

5.41 Encouragingly, the vast majority of businesses intend to stay in their current unit in Bishop's Stortford (83%), move to a bigger one (7%) or relocate within the town centre (5%).

5.42 Visit frequency is reasonably positive with 73% of Zone 3A and 80% of Zone 3B visiting the same as last year. Marginally more are visiting more than visiting less (14% more and 12% less in Zone 3A and 11% more with 9% less in Zone 3B).

5.43 The graph below show the satisfaction levels of residents from each zone and then a comparison of the zone responses. Residents are clearly more satisfied than dissatisfied, with the main difference being a large group 31%, in Zone 3A that are undecided.



5.44 As can be seen, most residents are satisfied with the existing offer in Bishop's Stortford, especially those in Zone 3B.

5.45 The busiest / visible 100% footfall point would appear to be at the entrance of Jackson Square, fronting Potter Street. However, the whole of Potter Street and much of South Street also contain high levels of footfall as far down to M&S / Tesco.

5.46 There are no regular statistics on the levels of footfall experienced in the centre. However it is possible to form a view based on the feedback from residents and businesses in regard to visit frequency trend and customer numbers. Residents indicate that visit frequency is typically in line with last year, with a few more visiting more than are visiting less. Two thirds of businesses say that customer numbers are even in line or increasing.

5.47 Given these findings we believe that footfall levels in the centre are good. Current marketing information for Jacksons Square Shopping Centre includes 'Bishop's Stortford sees robust footfall' and town centre footfall consistently surpasses 2.39 million during strong three-month periods.

5.48 Based on the latest occupancy information from Edozo (leading suppliers of commercial property information), Bishop's Stortford Town Centre has 303 retail and commercial units in the town centre (excluding residential and office units). Our place review identifies 22 vacant units, which therefore produces a vacancy rate of 7% for the town centre.

Identified Issues and Improvements Needed

The following table provides a SWOT analysis for Bishop's Stortford Town Centre.

Strengths	**Weaknesses**
The town centre environment is attractive and has significant heritage appeal. This aspect is 'liked' by residents	The environment of North Street has declined, with many long-term visible units blighting the offer (mostly ex-banks or food and beverage chain failures)
The convenience offer of the town centre is strong, with 2 full line supermarkets and a food hall within M&S. The improving food & beverage sector is also strong	The southern section of the town centre, as well as the approach from Hockerill into the town centre often has standing / stationery traffic and a poor-quality environment, including air quality issues as a result
Many vacant units have either recently or are currently being brought back into life	There are several large and long-term vacant units within Jackson's Square
The BID appears to be well liked by businesses and stakeholders and is doing a good job promoting the town centre and running events to attract additional footfall to the town centre	Whilst the River Stort traverses the town centre, its easily missed and often hidden from view. For sure, it is an under-utilised asset for the town centre
The recent opening of TK Maxx is a vote of approval in the town centre and is also a positive move in regards futureproofing its appeal	There is a perception amongst some businesses that town centre parking facilities are inadequate, and to lesser extent from residents as something to improve.
The town centre is trading well for many businesses, satisfaction levels are good, outlook is relatively positive	Secure bike parking facilities are limited in the town centre
Businesses are happy / content to continue trading in the town centre	There are not many aspects about the town centre that are positively rated by consumers
1-2 hour dwell time in town centre, indicates multiple reasons for visiting	The retail offer is not viewed very positively by consumers and there are lots of opportunities to improve this perception
Close to home / familiarity /environment are positive reasons for visiting	
High /frequent visit patterns from nearby areas	
Established eating out and socialising catchment and location	
Popular market with proven visitors / users	
The centre is well established and includes a wide ranging mix of nationals, independents and established hospitality offer	
Opportunities	**Threats**
The town centre has many strings to its bow, in terms of already having a number of key customer anchors and attractors, e.g. shops, restaurants,	Consumers continue to spend more of their expenditure online, in particular younger consumers

leisure offer, cultural offer, environment etc. Need to shout more about these to attract more repeat customers and appeal to the circa 40% in survey area that don't visit. Improve promotion of existing strengths, recognised differentiators	
The town centre offer already has some appeal to leisure cyclists, and undoubtedly more could be attracted to the town centre with better secure bike parking options in the heart of the town centre near to the existing food & beverage businesses on Potter and High Streets. This could support any changes to the Hockerill junction	Improving out of town and regional retail facilities in Harlow or Brookfield Shopping Centre with free plentiful car parking on site could continue to chip away at Bishop's Stortford core and loyal customer base
Improve the building blocks that underpin high satisfaction scores, e.g. facilities, offer, anchors, mixed use attractions, experiences etc	With little to actively like about the offer, residents may choose to visit elsewhere
Increase appeal of markets as destination drivers for other centre residents	Nearby competing centres already appeal to wider Bishop's Stortford catchment for multiple reasons, e.g. size and type of offer, ease (and cost of parking)
Increase the daytime and evening food and beverage offer / facilities and reasons to choose Bishop's Stortford to the proven socialisers (high eat out and drink out) in the catchment area.	The convenience / close to home / appeal loses out when compared to perceived poor facilities and public realm (in mind of businesses / consumers)
The town centre market could be more of a draw if it were bigger, had more dynamic traders, as well as more appealing, contemporary looking and better promoted in the round	Requirement to continually maintain and improve public realm as an increasingly important part of the larger centre visit experience. This also includes more shared seating, plus more external tables and chairs for eating and drinking
Increase reasons to choose to use Bishop's Stortford, including more retail, leisure, services, more events and more promotion	

Healthcheck Summary

5.49 The bespoke research undertaken for this project identifies that Bishop's Stortford is evidently in good health on many levels. Footfall levels are good / holding their own (based on business feedback), as is retailer motivation, and there are lots of previously empty units that have either already been re-occupied or are currently being fitted out and shortly about to reopen.

5.50 Consumers, businesses and stakeholders all agree the town centre is in a good place, has significant appeal and future prospects for the town centre are positive.

5.51 Furthermore, the town centre has great access, a well-maintained environment and lots of listed buildings in great condition.

5.52 As a result, the town centre has lots of reasons to visit it, including shopping, eating & drinking, work, leisure, culture and history. It has many of the key ingredients already in place to be a successful and sustainable town centre going forward.

5.53 There are a few murmurings from residents and businesses about the need to improve the experience, facilities, offer, markets, events and promotion, building on the strong existing success factors in place.

5.54 The major visible weakness in the town centre is the cluster of empty units on North Street. Although we understand the BID and other local stakeholders aspire to operate more events and markets there, accompanied with timed pedestrianisation. Both of which are likely to be beneficial for the town centre.

5.55 The challenge for Bishop's Stortford is to maintain the current positive performance and to remind customers about strengths, and then create further reasons to visit the town centre.

5.56 The town can't rest on its laurels, the best time to improve is when things are going well.

Hertford

Overview

5.57 Hertford is the county town of Hertfordshire, and it does feel like it. From the Castle, to the Museum, to the Council Offices and the new BEAM Theatre, it resonates history, heritage and quality. Its place making appeal and reputation are considerable as a result.

5.58 From its origins in the 10th century, the town has constantly been an important centre of commerce, employment, religion, culture and administration for the area. There are many listed and very well-maintained heritage buildings across the town centre (especially on Bull Plain, St Andrew Street, Fore Street and Parliament Square), creating a strong sense of history and identity throughout.

5.59 The mix and offer of the town centre has traditionally been dominated by independent businesses, and this continues to this day. Having said that, as a result of market forces over the last 10 years (increased use of internet by consumers, growing market share of out-of-town retail, the pandemic etc), the centre has evolved away from being dominated by specialist comparison goods retailers, to more of a focus these days on food & beverage (especially targeting the evening business) as well as beauty services.

Accessibility & Environment

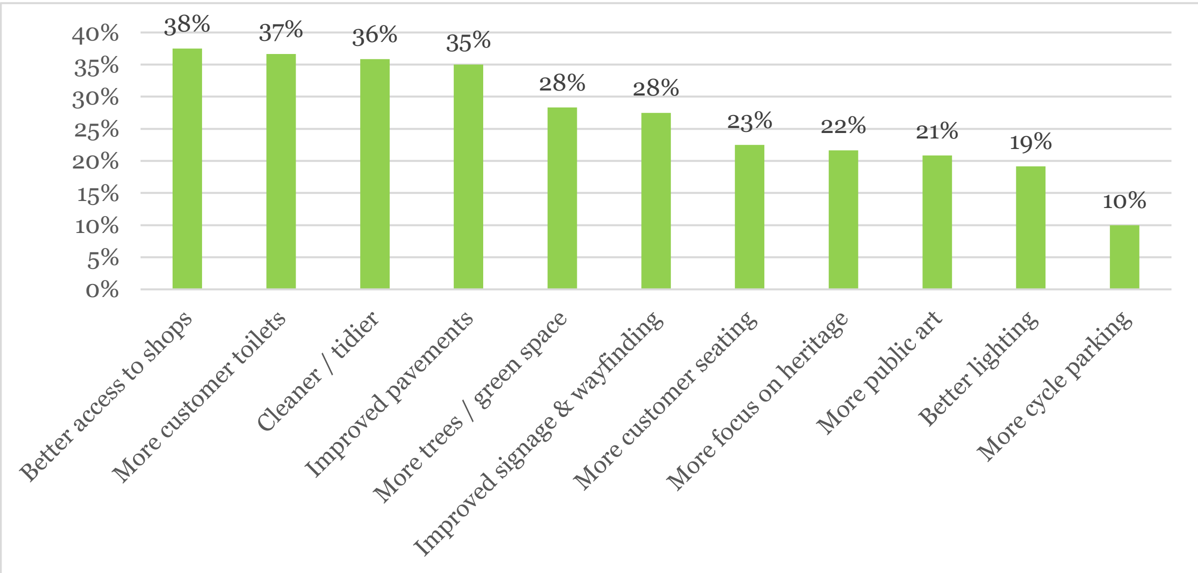
5.60 Hertford is well connected in terms of the road network, with both good east-west links via the A414 (west to Hatfield and east to Harlow) as well as north south via the A10 / A1(M) / M11.

5.61 The town centre offers a variety of short and long-term car parking options in the town centre, including Gascoyne Way (340 spaces), Hartham Lane / Common (200 combined), Hertford North Station (122 commuter spaces), St Andrew St (100), Old London Road (77) and Lea Wharf.

5.62 The town is also very well served by train, with two stations (Hertford North and Hertford East both attracting circa 1m annual passenger movements p.a. each) linking Cambridge to Central / City of London, although we note that Hertford North is a quite a long walk from the town centre.

5.63 The bus provision is also good and is served via a dedicated station in the heart of the town centre at the rear of the recently developed Lea Wharf (former Bircherley Green Centre).

5.64 In regard to improvements to the public realm of Hertford Town Centre, businesses told us they would like to see the following implemented:



5.65 As can be seen, most improvements wanted by businesses relate to better access to shops (such as easier to see windows and doors not impeded by street furniture); an improved and easier to use environment with better facilities and pavements; a greener environment for shoppers; better signage; more use of Hertford's heritage; more public art; and better lighting.

Diversity of Uses and Retailer Representation

5.66 A significant 120 businesses in Hertford Town Centre completed our survey, from circa 135 surveys handed out face to face and also available to complete online (the completion link was kindly shared with businesses across the town centre by Hertford Town Council). 36% were retail shops, 21% cafe / restaurant, 19% retail services and 10% financial services and 7% were pubs / bars.

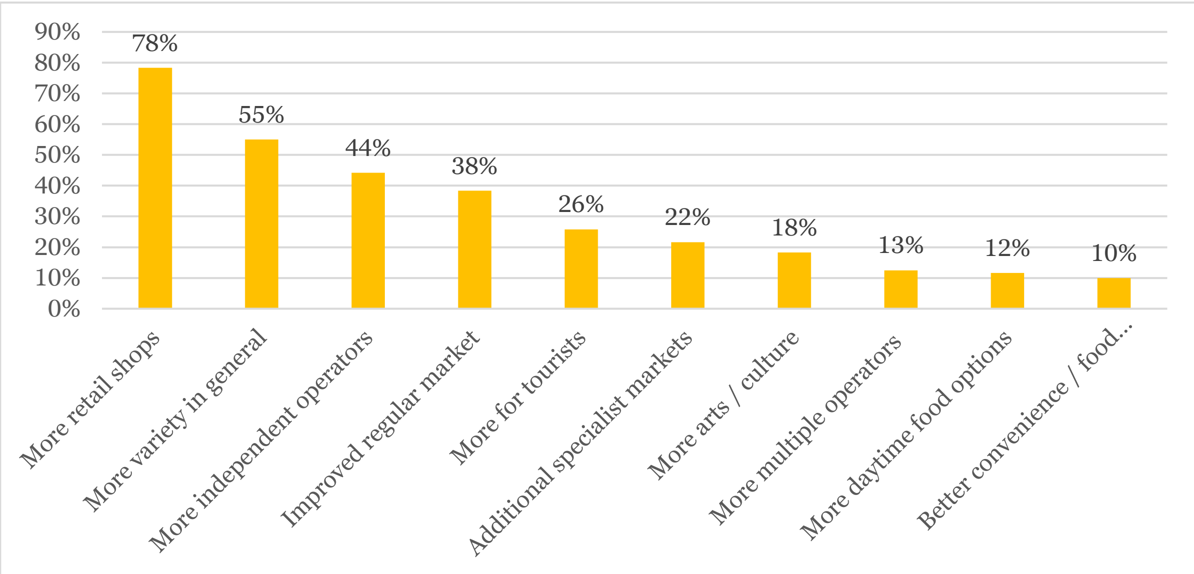
5.67 The town centre offers shoppers and visitors a fantastic choice of independent food & beverage operators, support by a strong health & beauty offer. The hairdressing / beauty aesthetics offer is especially strong, whilst the barber offer seems to be over supplied, with at least 15 units.

5.68 The daytime food and beverage offer is good in Hertford; however, the evening offer is outstanding in its range, quality and delivery from both multiple and especially independent businesses. The town rightly deserves its reputation as a great place for a great night out!

5.69 The specialist comparison goods offer has declined, although this is a widespread trend across the country due to pressures from business rates, and more recent increases in the minimum wage and National Insurance (NI).

5.70 The convenience food offer in the town centre is poor, and the town centre undoubtedly suffered through loss of the Waitrose store during the redevelopment of Bircherley Green Centre. M&S, with its small convenience store on the periphery of the town centre is the only remaining specialist multiple food business left in the town centre although there are bigger supermarkets a short walk / drive from the town centre.

5.71 In regards improvements wanted to the mix / offer, businesses told us they want to see:

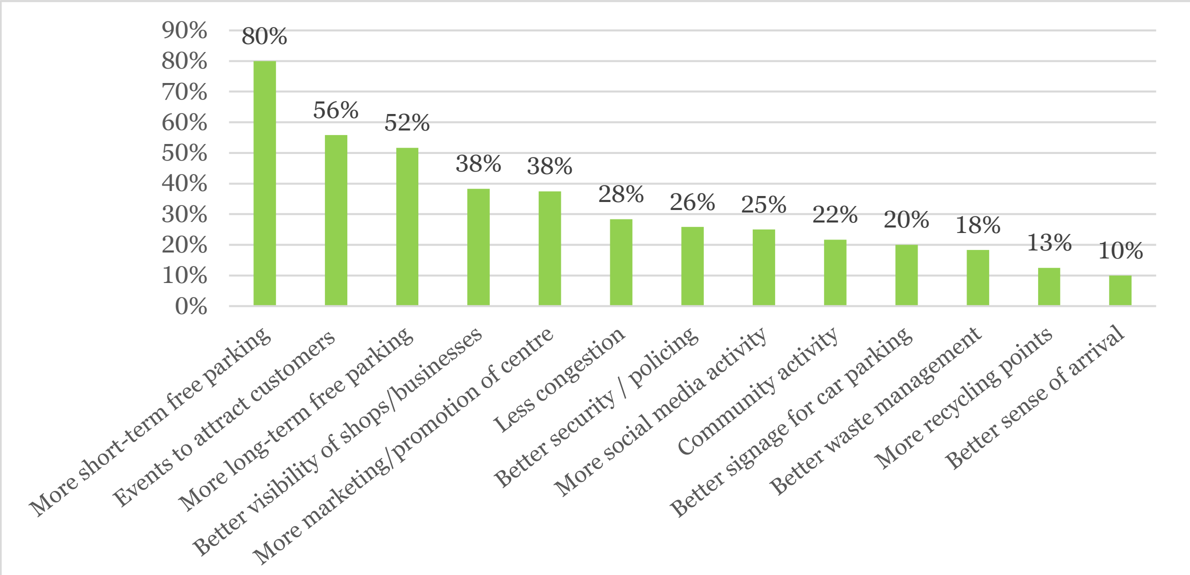


5.72 Businesses in Hertford Town Centre are strongly asking for more independent retail businesses, offering greater variety and choice, in keeping with Hertford's long-term role and reputation. They also want an improved market offer, along with more for tourists, more culture, more multiple businesses and more daytime food options / convenience food.

5.73 BID's can help improve the experience of shoppers, improve the environment in places and help improve their marketing and promotion. Hertford businesses were therefore asked whether they would be in favour of a new BID being introduced, and 51% of respondents said they needed more information to be able to provide a view and or weren't sure. 23% said no, and 14% said yes.

Customer Experience

5.74 Businesses who took part in the survey were also asked their views on potential improvements to the customer experience, and the responses included:



5.75 Businesses feel as strongly about the need for more short-term free parking as they do for more retail shops (as shown on the graph above and on previous page). They would also like to see more long-term free parking; more events and activities that drive footfall to the town centre; an easier to use offer; better marketing and promotion; a more visible offer and better experience in the round.

Customer Behaviour & Views

5.76 Hertford achieves a weekly visit from 24% of the total household survey area. That said, 42% of the total area visit it less than once a year or not at all. The main source of regular customers is from Zone 1, from which 74% visit weekly. Hertford also achieves strong visit frequency from Zone 2, with 29% visiting weekly and 24% visiting fortnightly. Zones 3A, 3B, 4, and 5 have high levels of never visit responses for Hertford.

5.77 Hertford is the most visited centre for Zone 1 residents at 95%. It also achieves 'most visited' levels of 14% (Zone2), 12% (Zone 4) and 11% (Zone 5).

5.78 Modes of travel into Hertford Town Centre are split into two main groups, car borne at 59% and walk-in at 35%.

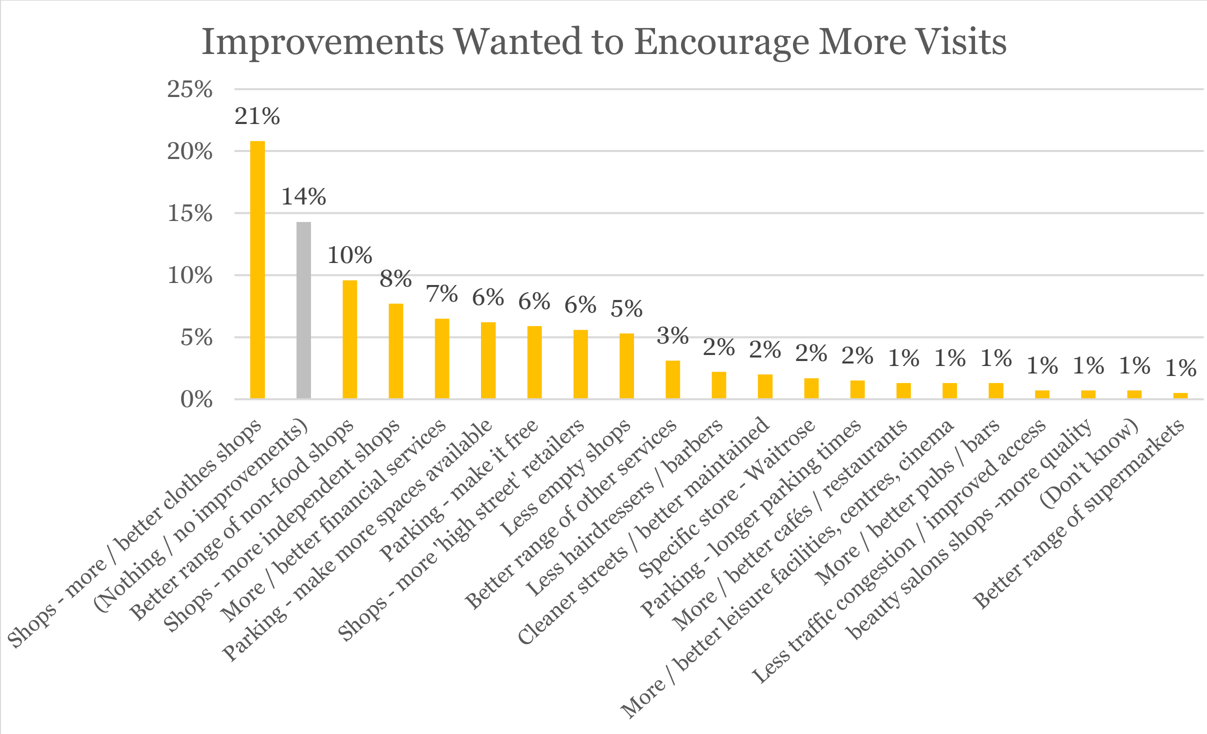
5.79 The typical most frequent visit duration into the town is for less than 30 minutes at 46%. Circa 20% of visits are for 1-2 hours, 14% are for 30 minutes to an hour, and 12% are for 2-3 hours. Hertford seems to be popular as a place to visit quickly.

5.80 Circa 36% of respondents in Zone 1 indicated they used markets in the town. The regular weekly Saturday Market is popular with its users, 92% of Zone 1 market user respondents use it. 30% of market users in Zone 1, use the monthly farmers market. Only 6% (of market users in Zone 1) use the irregular / periodic street food markets.

5.81 Given the popularity of the weekly market with its users, unsurprisingly 34% said no improvements are needed. The improvements wanted to the markets include more quality (25%), more stalls (22%) and to a lesser extent more farmers markets (6%).

5.82 The aspects that respondents indicated they liked about the centre, tended to be convenience and environment rather than choice or offer. The top like was 'close to home' (24%). 11% liked environment and 10% traditional / quaint. Only 9% mentioned café / restaurants and 6% choice of shops. 6% said nothing.

5.83 As shown in the graph below, there are lots of requirements to improve the offer with 21% wanting more clothes shops, 10% more non-food, 8% more independents, 7% more financial services and 6% more high street retailers. More parking and free parking wanted by 6% each. Nothing / 'no improvements specified' achieved 14%.



5.84 Hertford residents (Zone 1) have a propensity to go out for a drink as a leisure activity, with circa 65% going out at least monthly (combining the weekly, fortnightly and monthly respondents). In terms of typical destinations these are limited to Hertford Town Centre, 74%, Central London 8%, and Hoddesdon 5%.

5.85 There is a larger group that go out to eat, totalling 84% (weekly, fortnightly and monthly responses combined). Of destination locations, 62% go to Hertford, 12% go to Stevenage and 7% to London / West End.

Indicators of Health & Vitality

5.86 Businesses told us that 38% of them were trading in line with last year in regards customer numbers, and also the same percentage of businesses are reporting customer numbers are down. Only 22% report a rise in customer numbers. This is a result of minor concern and shows a significant minority of businesses in Hertford Town Centre are finding current trading tough.

5.87 In regard to sales trend, 38% are reporting current sales as being down on last year's sales, 34% reporting static sales, and only 21% reporting increasing sales. Again, a finding of concern.

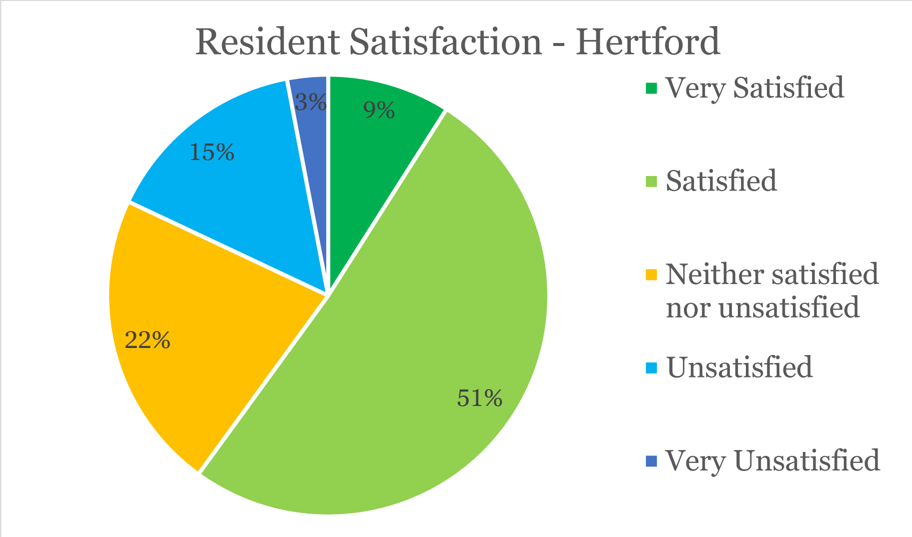
5.88 When asked how satisfied they are with Hertford as a place to do business, 41% are dissatisfied, 37% satisfied and 23% neither satisfied nor unsatisfied.

5.89 In regards future trading prospects, 44% are pessimistic, 37% optimistic and 23% neither pessimistic nor optimistic.

5.90 Encouragingly, whilst the majority of businesses intend to stay in the current unit in Hertford (85%), unfortunately 5% want to relocate away from the town centre and 5% are seeking to close their business altogether.

5.91 From the residents' perspective, Hertford is on a positive visit trend, with 80% visiting the same as last year and 15% visiting more.

5.92 As can be seen in the pie chart below, resident satisfaction levels with the centre are reasonably positive, with many more being satisfied (60%) than dissatisfied (18%), equating to satisfaction ratio from residents of 3:1. Almost a quarter of residents are undecided.



5.93 The busiest / 100% footfall point in Hertford would appear to be on Railway St between the junction of the entrance to Lea Wharf and the confluence of Maidenhead St / Bull Plain. There are no regular statistics on the levels of footfall experienced in the centre. However, it is possible to form a view based on the feedback from residents in regard to visit frequency trend and customer numbers. Residents indicate that visit frequency is typically in line with last year, with a few more visiting more that are visiting less.

5.94 Whilst there are a number of existing vacant units in the town centre, the reality is they tend to be quickly reoccupied, often by tenants as good as or even better than the previous occupants. Most of the larger units previously occupied by banks and building societies have also been re-occupied with innovative uses including a bar/restaurant, nursery and a solicitor.

5.95 Based on the latest occupancy information from Edozo (leading suppliers of commercial property information), Hertford Town Centre has 301 retail and commercial units in the town centre (excluding residential and office units). Our place review identifies 21 vacant units, which therefore produces a vacancy rate of 7% for the town centre.

Identified Issues and Improvements Needed

The following table provides a SWOT analysis for Hertford Town Centre.

Strengths	**Weaknesses**
The town centre has a fantastic, appealing and memorable public realm	Business are significantly of the opinion that the town needs more free car parking, both short and long term. However, this is much less of an issue for residents / customers
The town centre is easy to traverse as a pedestrian	Anecdotally, several businesses told us that they feel parking rules are 'overzealous and punitive', to the detriment of the experience of customers and visitors using the town centre. Having said that, we also understand that rules on blue badge parking have changed recently, and clearly some disabled customers are either not aware of, or fail to understand the new rules
Most businesses are either trading inline with last year or are above (when combined)	Many businesses are reporting challenging trading conditions in Hertford Town Centre. Significantly more businesses have reduced customers numbers and sales than those who are

	up
The town centre has a positive rate of churn, with many of the units that become empty being re-occupied relatively quickly	The town centre markets are limited for a market town with the profile and history of Hertford and look a little dated in their mix, facilities and merchandise / visual merchandising style of traders. Having said that, some residents do see them as a strength for the town centre
Town centre offer has a positive reputation for strong independent businesses, especially those selling food and beverage or beauty services	Short visit duration of up to 30 minutes dominates the usage type
Being close to home, convenient and a nice environment are 'likes' mentioned by residents. These are strong foundations to build on for a healthy town centre	Other than convenience and the environment there are limited 'likes' about the town from residents
A strong 'eat out' culture and activity among residents. This provides good foundations for a strong evening economy	Retail offer identified by businesses as being in need of improvement, particularly in regards more retail businesses, more variety, more specialist independents and better markets
The town centre has a popular weekly Saturday market	A third of residents go to other centres, for food and beverage trips, including Stevenage. It would be interesting to know their motivations why
Hertford is a popular destination for food and beverage trips, as well as tourism and leisure (including the new BEAM venue as well as the Corn Exchange)	Satisfaction ratings are ok with residents (less so from businesses), but not as good as could be, or satisfaction levels for the other study centres
Opportunities	**Threats**
Work with key partners (EHDC tourism team, town council, businesses, visitor attractions such as the Castle or BEAM) to create an extended program of events in the town centre	If M&S pull out of the town centre, this will leave no dedicated multiple operated foodstore in the town centre. Tesco and Sainsbury have large format stores nearby, but most people drive to these stores as a separate trip
More secure bike parking will help to draw more affluent cyclists into the town centre according to stakeholders. Improved signage and information about parking will go a long way to improving the customer experience.	If Hertford develops a reputation for difficult parking this could be a deterrence for consumers to visit / pop into the town centre. Better signage (physical and online) as well as PR campaign to better communicate the new parking rules and regime could also help
Procure and then deliver a markets growth strategy	A potential lack of visible improvement, could lead to continued decline in visitor numbers / appeal of centre
Expand choice, offer, facilities, experience and diversity to extend visit duration	Resident satisfaction with Hertford has high numbers of undecided, they could easily decide to go elsewhere
Improve the appeal of the town centre as an eating out location, recapture spend lost to Stevenage	Lack of focus and planned marketing / events and other footfall drivers
Increase dwell time, through offer, facilities and experience	
Target more customers that walk into the centre, building on the already established habit	
Appeal to wider catchment, need to increase this to attract even more customers to the centre	
Build on all identified strengths.	
Increase promotion of the strengths and established 'reasons to use' the centre	
Address identified issues and weaknesses,	

directly and visibly	
Promote benefits of a BID and ability to target stated improvement areas	

Healthcheck Summary

5.96 Is Hertford Town Centre healthy and vital? The bespoke research undertaken for this project suggests this is actually not a straightforward question to answer.

5.97 Starting with the positives, the town centre clearly has much to like about it and offers shoppers and visitors a multitude of reasons to visit it, including the strength and diversity of the independent businesses trading there, extensive food & beverage and beauty services offer, rich history and many well-kept listed buildings, high quality environment, plus the very good cultural, leisure and heritage offer. As a result, the town centre historically has had a positive reputation as a place to trade as well as a nice place to visit and enjoy for consumers.

5.98 The other major positives are retail units that become vacant are typically quickly reoccupied or repurposed by appealing and capable occupants, and visible footfall levels in the heart of the town centre are healthy and strong.

5.99 According to businesses, however, a significant proportion report current trading as challenging. Many also have concerns about the future trading prospects in the town centre. One of their biggest issues is the lack of short-term parking (especially free) combined with reportedly 'overzealous parking rules' and a lack of clear information about the new parking regime for disabled customers. Whilst parking is one of the resident identified areas to improve, it is less of an issue than for businesses.

5.100 For a town that attracts and relies on lots of top-up visits and quick purchases, if trips to the town centre start to be perceived as being difficult or onerous, this could affect the consumer visit propensity. Therefore, encouraging longer dwell time and promoting existing facilities can help to reduce this potential impact.

5.101 On balance the town centre probably is still healthy. However, the above negative issues are certainly of concern, and the town centre is undoubtedly in a state of flux. Businesses need more demonstration of positive investment and support, improved facilities, more visible events, promotion and more activities to generate footfall / create growth.

Ware

Overview

5.102 Ware is a parish and town in East Herts, located circa 3.5 miles / 11 mins drive to the east of Hertford. The town has a rich history and heritage dating back to pre-Roman times, with evidence of continuous settlement going back as far as 4,000 BC.

5.103 As such, the town has long been a centre of agriculture, industry, employment and commerce. It has also had a longstanding role as a staging post for travellers passing through the area, and to an extent still performs a similar role today given its excellent accessibility by road, foot, rail, bus and river.

5.104 The town centre broadly flows north west to south east, although it also extends southwards over the River Lea linking to Amwell End. The town itself is surrounded by lots of open, unspoilt and well-kept rural countryside.

5.105 In regards the primary research for this project, 42 businesses took part in our business survey, one stakeholder completed a survey and just over 126 residents completed surveys in the Zone 2 Ware residential zone.

Accessibility & Environment

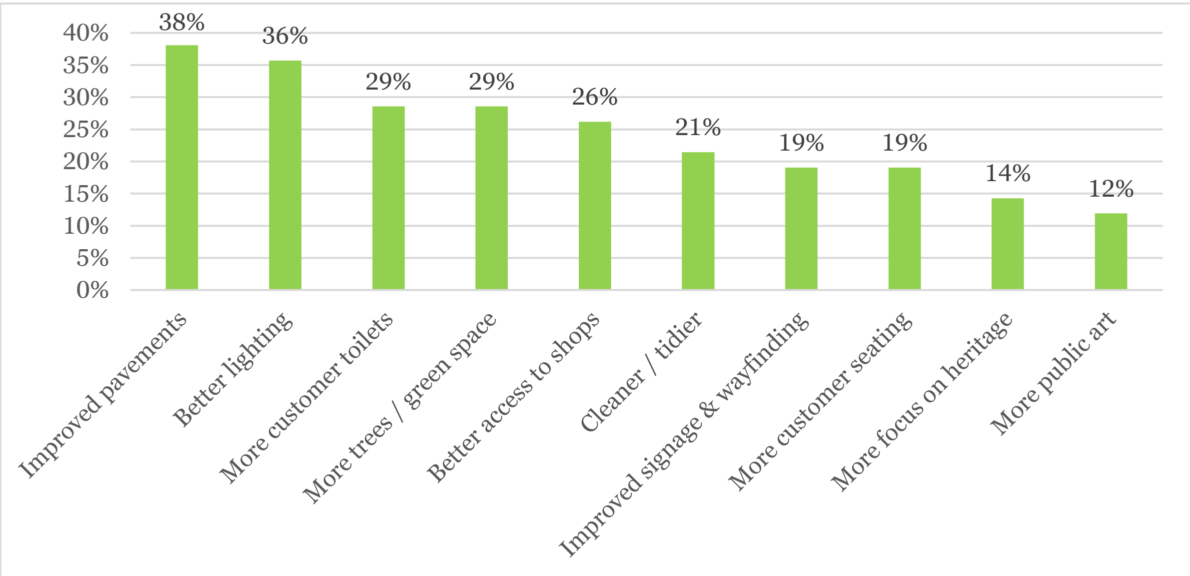
5.106 As mentioned above, Ware benefits from excellent accessibility north and south due to its adjacency to the A10, as well as relatively close proximity to the M11 and A1(M). It also had good east-west access as a result of the A414.

5.107 The town benefits from a railway station on the Hertford East section of the Greater Anglia Main Line, providing excellent links down to North London, through Tottenham and ultimately to Liverpool Street, thus providing good commuter links for local workers into London. Whilst the town doesn't have a dedicated bus station, many of the bus routes linking the town and surrounding hinterland do terminate at the rail station.

5.108 The town centre is also located on the River Lea Navigation, again providing good links into North London and beyond.

5.109 There are several car parks in the town centre, with the main ones being Kibes Lane (115 short stay spaces), Burgage Lane (76 short), Baldock Street (63 long/short combined) and Amwell End West (56 combined) and Amwell East (25 short). Furthermore, the town's main food anchor Tesco on Baldock St also has 260 spaces available for the benefit of visitors to the store and the wider town centre.

5.110 Businesses told us they would like to see the following the improvements to the public realm of Ware Town Centre:

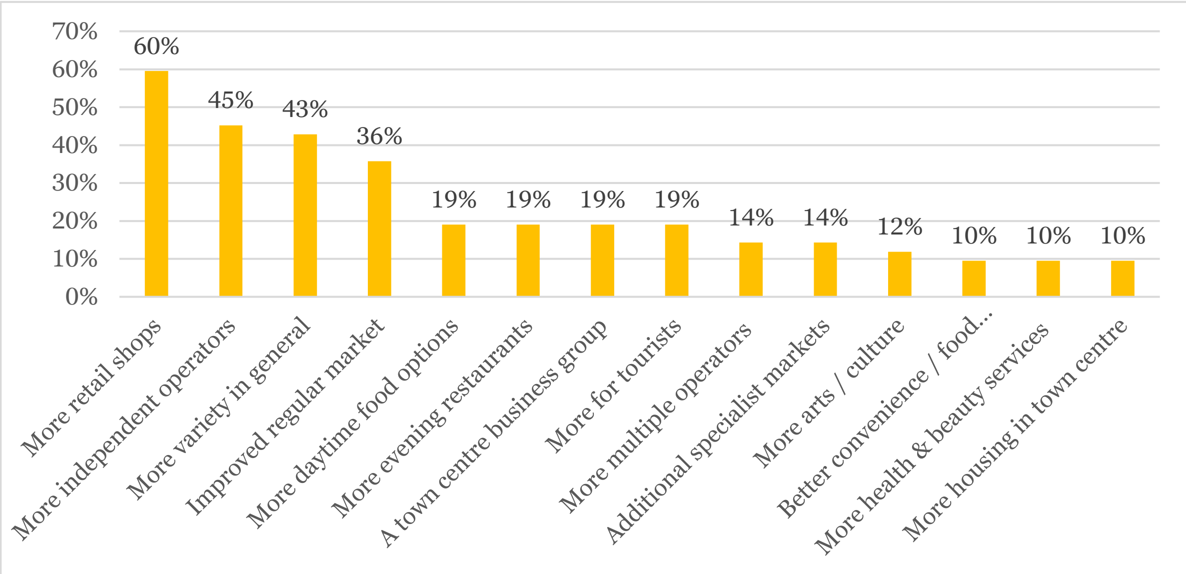


5.111 As can be seen, most improvements wanted by businesses relate to an improved environment for consumers, better facilities, easier to use offer, more greening, cleaner and improved signage / wayfinding.

Diversity of Uses and Retailer Representation

5.112 In the sample of 42 businesses that completed our survey, 29% were retail shops, 21% cafe / restaurant, 21% retail services and 14% financial services.

5.113 In regards improvements wanted to the mix / offer, businesses told us they want to see:



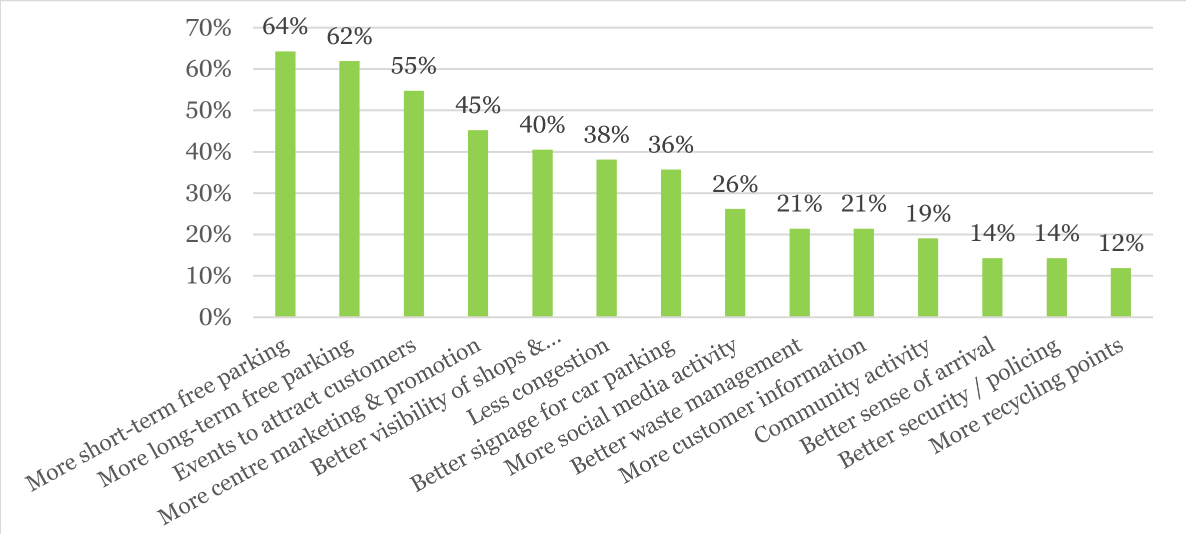
5.114 As can be seen, businesses want a better version of what is currently available in Ware, with more choice and an extended offer. In particular, they want more independents, an improved markets offer, better food & beverage offer (daytime and evening), a town centre business group plus additional varied reasons to visit the town centre.

5.115 The offer from national multiple businesses in the town centre is limited, with Tesco, Boots, Sainsbury and Card Factory dominating this offer. The independent offer is good however, with several specialist operators trading, including books, gifts, clothing, eco-refill and several beauty services specialists.

5.116 The food and beverage offer is relatively good, being dominated by some strong independent offers. The new development on Amwell End is evidently popular with its contemporary artisan bakers, pizzeria, bagel shop, craft ale tap room and coffee shop. There are also two large and popular riverside pubs on Bridge Foot.

Customer Experience

5.117 Businesses who took part in the survey were also asked their views on potential improvements to the customer experience, and the responses included:



5.118 Businesses in Ware clearly identify a lack of free car parking (short and long-term) as being a major issue in the town centre affecting the customer experience, albeit in line with other experiential issues.

5.119 Other issues include the need for more promotion and events to drive footfall (including social media), traffic, waste management / lack of recycling, the sense of arrival, lack of customer information and more security needed.

5.120 The markets offer in Ware is limited. Having two or three stalls in two locations weakens the critical mass, impact and ultimately performance of the offer. Choice is limited too within the markets, being one or two stalls max per category (fruit & veg, plants / flowers, women's clothing and so on).

5.121 Of concern in Ware is the number of large long term vacant units in the town centre. Whilst many of them are ex-banks (in common with many town centres across the country), it is worrying that they haven't been re-occupied or re-purposed (as they are in Hertford and Bishop's Stortford for example).

Customer Behaviour and Views

5.122 Ware achieves a weekly visit from 21% of the total household survey area. That said, 47% of the total area visit it less than once a year or not at all. The main source of regular customers is from Zone 2, from which 87% of respondents say they visit Ware 'weekly'. Ware does not achieve strong visit frequency from any other Zone. Zones 3A, 3B, achieve high levels of 'never visit' or 'visit less than once per year' responses for Ware (80% and 67% respectively). Ware is securing its customers from Zone 2.

5.123 Ware is the most visited centre for zone 2 residents with 80% of Zone 2 residents saying it is their most visited centre. It also achieves 'most visited' levels of 14% (zone 1), 17% (zone 4) and 14% (zone 5).

5.124 The main modes of travel into the centre are car-borne at 78% and walk-in at 17%.

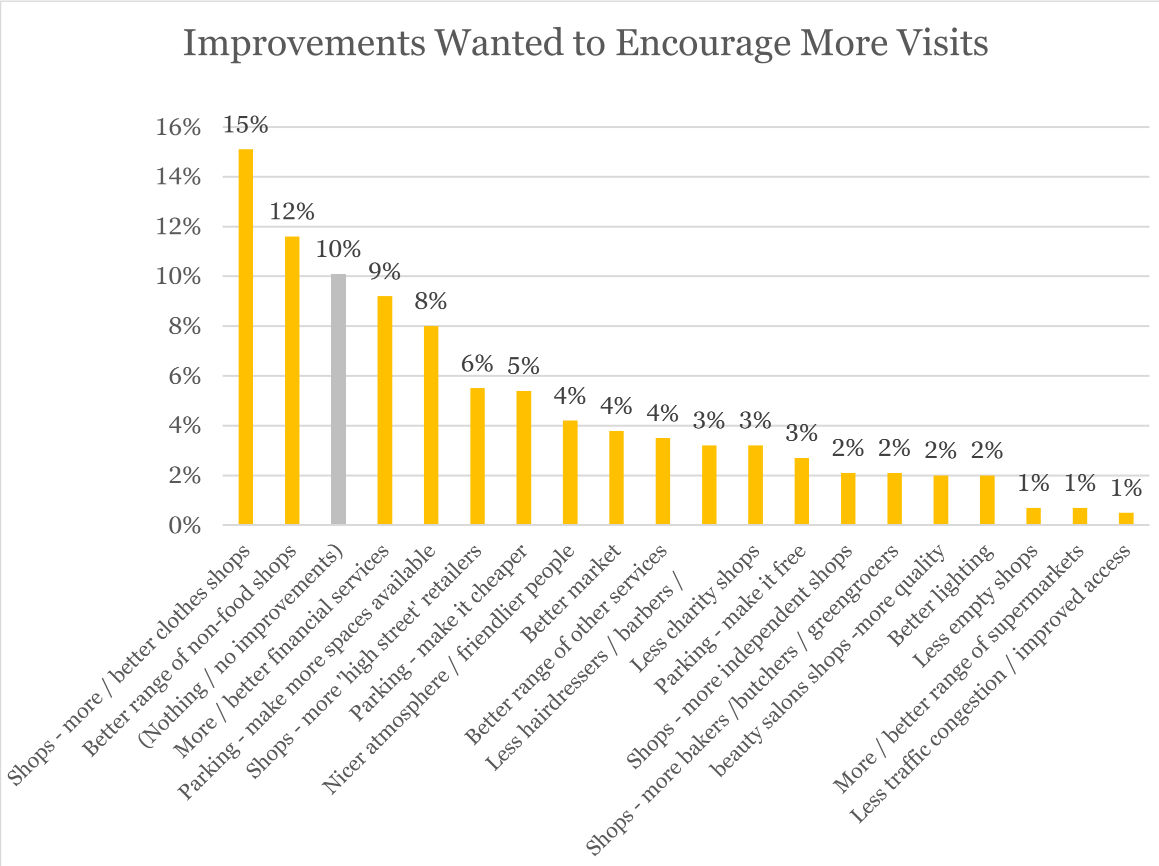
5.125 The typical, most frequent visit duration into the town is split amongst two durations. The respondents percentages are all from Zone 2. Less than 30 minutes at 34%, and also for 1-2 hours at 30%. 14% are for 30 minutes to an hour, and 13% are for 2-3 hours. We would interpret this as Ware is both used as a place to pop in, and as a place for slightly longer visits.

5.126 Circa 29% of Zone 2 respondents indicated they used markets in the town. The regular weekly Tuesday market is most popular with its users, 57% of Zone 2 market user respondents use it. 41% of Zone 2 market users use the monthly local produce / craft market. Interestingly 16% of Zone 2 market users, use the Hertford Saturday Market. These market usage figures are lower than other centres in the study area,

5.127 The improvements wanted to markets include, more fruit & veg stalls (20%), more quality (15%), more non-food stalls (11%) and more clothing stalls (19%). 21% said no improvements needed.

5.128 The main likes about the centre tended to be convenience and environment, rather than choice or offer. The top like 'close to home' (19%) followed by 'traditional / quaint' (13%). Only 7% mentioned café / restaurants and 6% choice of independent shops. 18% said nothing.

5.129 As shown below, there are few consistent requirements for improvements. 15% want more clothes shops, 12% more non-food, 6% more high street retailers and 9% more financial services. More parking is wanted by 8%. 'Nothing' achieved 10%.



5.130 71% of residents in Zone 2 (Ware and nearby villages) have a propensity to go out for a drink as a leisure activity, going out at least monthly (combining weekly, fortnightly and monthly responses). In terms of typical destinations, these are varied and include Ware (63%), Hertford (13%), Harlow (7%) and Stevenage (6%).

5.131 The number of residents that go out to eat is similar at 72% (weekly, fortnightly and monthly responses combined). Destination locations are numerous and include Ware (38%), Stevenage (23%), Bishop's Stortford (10%) and then Hertford / Harlow (both at 8%).

Indicators of Health & Vitality

5.132 Of concern is that 45% of businesses in Ware told us that customer numbers are down on last year. 26% said customer numbers were in line with last year, and 24% said they were increasing.

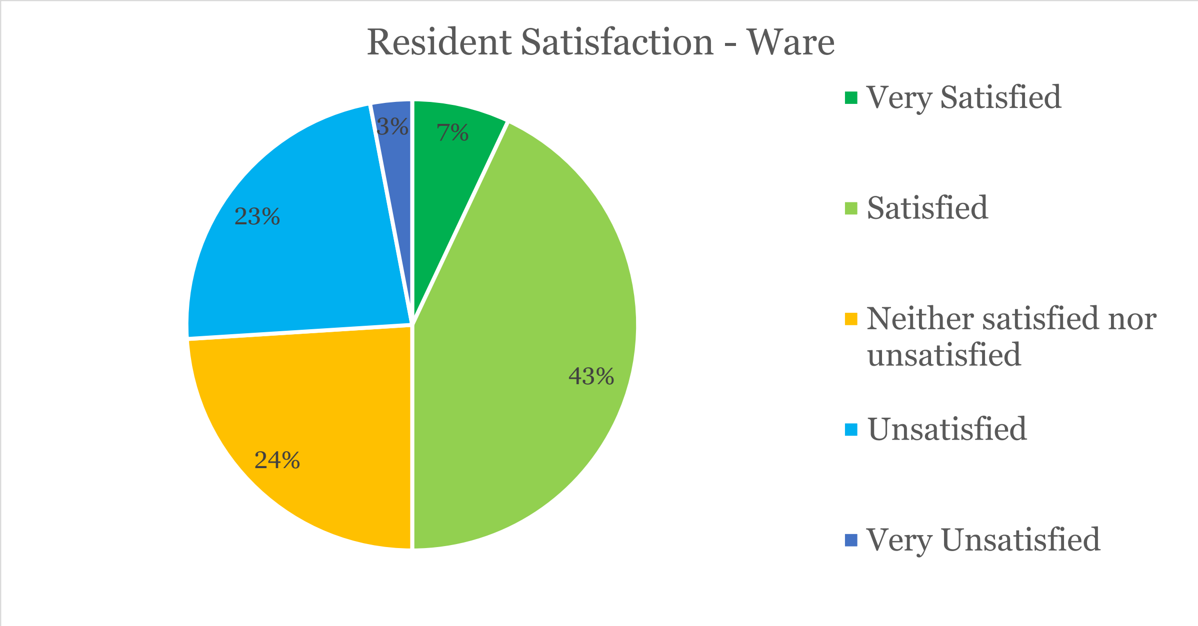
5.133 In regards sales trends, 43% said their sales were down, whereas 29% said sales were static and 24% said sales were up.

5.134 When asked how satisfied they are with Ware as a place to trade, 38% are satisfied, 26% neither / not and 31% dissatisfied.

5.135 In regards future trading prospects of trading in Ware Town Centre, 21% of businesses are optimistic, 38% neither / nor and 36% are pessimistic.

5.136 Whilst the vast majority of businesses intend to stay in their current unit in Ware (81%), 12% are looking to relocate away from the town centre.

5.137 In regards customer visit patterns, Ware is on a positive visit trend, with 71% of consumers visiting the same as last year and 19% visiting more.



5.138 As can be seen, resident satisfaction levels within Ware are the weakest across all East Herts centres, with only half being satisfied (50%) and 26% dissatisfied, a ratio of 2:1 satisfaction. Almost a quarter of residents are undecided. This is clearly an area for improvement.

5.139 The busiest/ 100% footfall point in Ware would appear to be near the southern entrance of Tesco near West St / just off High Street. No town-wide up to date or reliable footfall counts exist.

5.140 The visit information from residents and businesses is slightly contradictory. Residents indicate that visit frequency is typically in line with last year, and a reasonable group are visiting more. Almost half of businesses say that customer numbers are declining. This may indicate a longer period of decline (given that resident visits are stable year on year). Based on the contradictory views and the business pessimistic outlook we believe that footfall levels in the centre are moderate.

5.141 Based on the latest occupancy information from Edozo (leading suppliers of commercial property information), Ware Town Centre has 192 retail and commercial units in the town centre (excluding residential and office units). Our place review identifies 18 vacant units, which therefore produces a vacancy rate of 9% for the town centre.

Identified Issues and Improvements Needed

The following table provides a SWOT analysis for Ware Town Centre.

Strengths	**Weaknesses**
It is the most visited centre from the immediate catchment area	A car borne customer base, with limited other modes of access.
High and frequent visit patterns, lots of weekly visitors	Customers also choose to go elsewhere for eating
Convenience of place and environment are viewed as good	Choice / offer of town centre not particularly liked
Good for short visits and also 1-2 hour visits	Lots of improvement areas identified, including many public realm aspects and many offer

	aspects
Popular weekly and monthly markets, although they do need improving in regards more stalls, more choice and more quality	Resident satisfaction levels are lowest in study area
Eating out and drinking out are popular with residents, Ware is especially for drinks	Both customer numbers and sales are down for nearly half of businesses in the town centre
	Parking cost and availability is cited as a weakness by businesses, although it is less of an issue with residents / customers
	Lots of food and beverage visits to other centres
	Business outlook is pessimistic
	Many of the larger vacant ex-banks remain empty and unoccupied
Opportunities	**Threats**
Target the re-occupation of the many empty units in Ware. Engage with landlords and help them market the properties	Unless they see more positive news, more retailers could bring forward their plans to move away from the town centre
Work with key local stakeholders in the town centre to curate more events and activities to drive footfall	Increased use of other centres for food and beverage purposes reduces visits to town centre
Improve the market offer to attract more visits	Weak events programme leads to loss of footfall
Improve public realm to further enhance experience and convenience	Lack of attraction with new businesses for town centre
Improve customer facilities to attract and retain more customers in the town, including more seating, more tables and chairs outside food & beverage outlets, pavements and better toilets	

Healthcheck Summary

5.142 The research undertaken for this project suggests that there are some elements of concern in regards the health and vitality of Ware Town Centre.

5.143 As has been identified, many of the units that were vacant a year ago are still empty. Few of the ex-banks have been brought back into life (as they have in Hertford and Bishop's Stortford). Furthermore although the vacancy rate of 9% is not significantly high in the context of many retail centres across the country, it is the highest out of all five centres in the Study.

5.144 Furthermore, the quality and choice within the retail mix appears to declining. There are few recognisable multiple businesses trading in the town centre. Furthermore, several ex-retail units are now trading as barbers. This in itself is not necessarily a bad thing, but for a town centre of Ware's size, having over 10 men's barbers in the town centre appears to be oversaturated.

5.145 Several of the retail / commercial building frontages in the town centre are in a poorly maintained condition and need investment by their building owners, hence further reinforcing the sense of malaise about the core town centre area.

5.146 The daytime catering offer is basic, as is the specialist coffee / hot drinks sector. Similarly, many of the pubs seem to be mainstream chain multiple pubs. Again not bad in itself, but it does mean the replicated and overlapping offer is not providing consumers with many additional, unique or memorable reasons to visit the town centre.

5.147 This last point (too much repetition within the offer and not enough variety and choice) came out strongly in our research with businesses, consumers and stakeholders.

5.148 Many businesses are facing challenging performance in Ware, and many are concerned about the future prospects of trading in the town centre.

5.149 The market currently is not big enough, not contemporary or high quality enough to act as a draw to the town centre. It has good potential however to generate additional footfall for the town centre, providing it can up its size, choice and appeal.

5.150 In addition to improvements to the offer, there are aspects of experience, facilities, management of the offer, parking, marketing / promotion / events, and environment that if improved, will help to improve the vitality of the centre.

5.151 The main green shoot of optimism is the occupancy and performance of the new F&B dominated offer in Amwell End, which seems to have been embraced by the many young professionals living in Ware. This offer therefore provides an element of optimism for the future plus reinforces the need for the existing offer to 'up its game'.

Sawbridgeworth

Overview

5.152 Sawbridgeworth lies 10 miles east of the county town of Hertford, in between the towns of Bishop's Stortford to the north and Harlow to the south.

5.153 Dating back to Saxon times and recorded in the Domesday Book, Sawbridgeworth is predominantly a residential town home to around 8500 people, offering a blend of rural charm and commuter convenience. Known for its safety, excellent schools, and picturesque River Stort setting, it is popular with commuters due to its mainline railway station connection to London Liverpool Street Station.

5.154 The main retail / ‘town centre’ offer is along Bell Street which connects the busy A1184 (Bishop’s Stortford to Harlow road) to the historic Great St. Mary’s Church. The town is surrounded by countryside, as well as parkland and borders onto the River Stort.

5.155 In regards the primary research for this project, 33 businesses took part in our business survey, one stakeholder completed a survey and just over 126 residents completed surveys in the Zone 5 Sawbridgeworth residential zone.

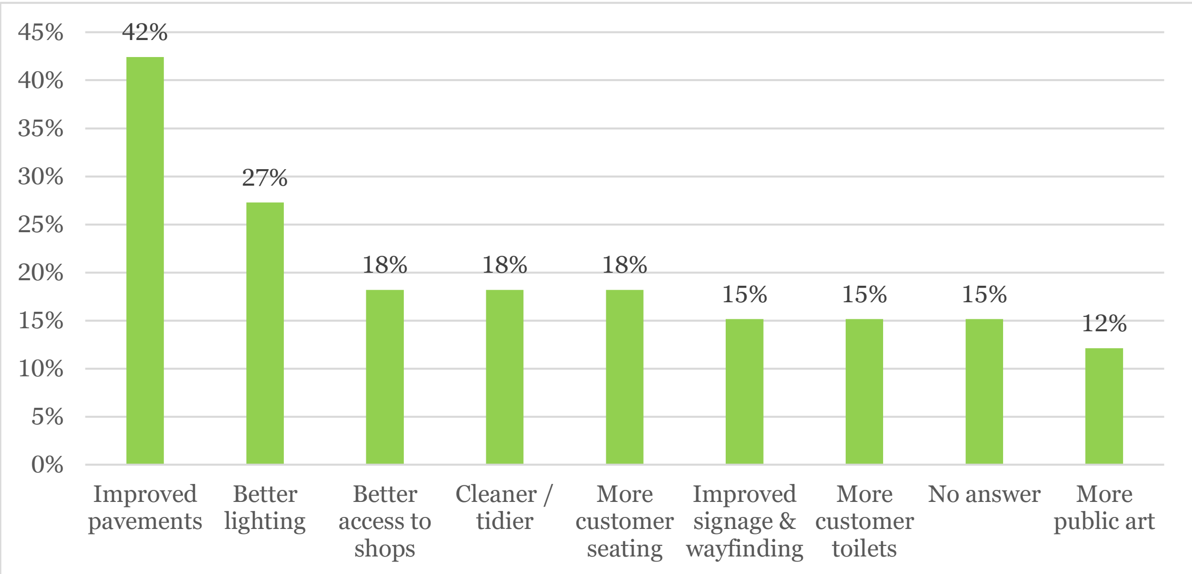
Accessibility & Environment

5.156 Sawbridgeworth benefits from good road connections. The A1184 passes through the town and provides easy access to the M11 and A414, linking Sawbridgeworth to nearby towns such as Bishop’s Stortford, Harlow and Hertford. Local bus services further support travel within the town and surrounding areas.

5.157 Sawbridgeworth benefits from strong transport links, making it a convenient location for commuters and residents alike. The town has its own railway station on the Greater Anglia Main Line, offering regular services to London Liverpool Street, Cambridge and Stansted Airport. Journey times to London are typically under an hour, making daily commuting realistic.

5.158 Bell Street also provides the main car parking facility in the town centre, operated by the Council. It offers 96 spaces, and provides easy pedestrian access into the heart of the small centre. The Co-op foodstore offers further town centre car parking, while the station also has a car park which caters for commuters rather than town centre users.

5.159 Businesses told us they would like to see the following the improvements to the public realm of Sawbridgeworth Town Centre:



5.160 As can be seen, most improvements wanted by businesses relate to an improved environment for consumers, especially better pavements and better lighting. Other 'wants' include better facilities (more seating and toilets), cleaner / tidier, an easier to use offer and improved information / way finding.

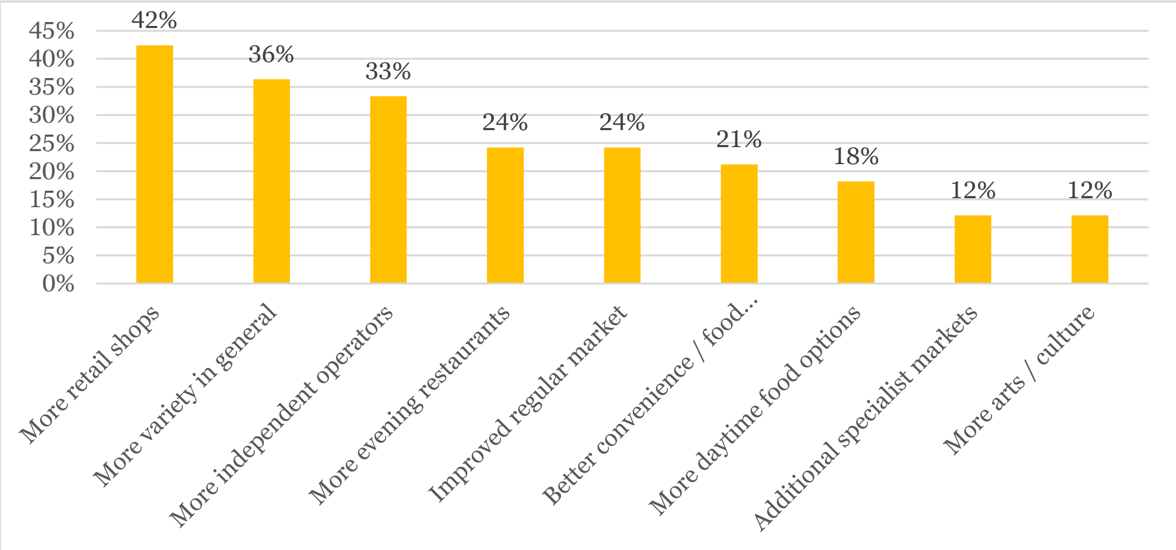
Diversity of Uses and Retailer Representation

5.161 In the sample of 33 businesses that completed our survey, 36% were retail shops, 12% cafe / restaurant, 24% retail services, 9% pub or bar and 9% financial services. The service provision and general food and beverage offer are important elements for the centre.

5.162 The town centre offer of Sawbridgeworth exists to satisfy the frequently bought convenience, retail services (especially the hair / beauty services requirements) and food & beverage needs of local residents. The town centre is evidently appealing to consumers walking to it, although the busy main car park suggests many drive also.

5.163 Whilst the foodstore provision in the core town centre area is limited, there is a busy and popular Co-op on the western periphery of the town centre boundary at the junction with London Road, as well as a mini Waitrose concession within a Shell petrol station immediately to the north of it. There is also a small Morrisons Daily convenience store on Bell Street.

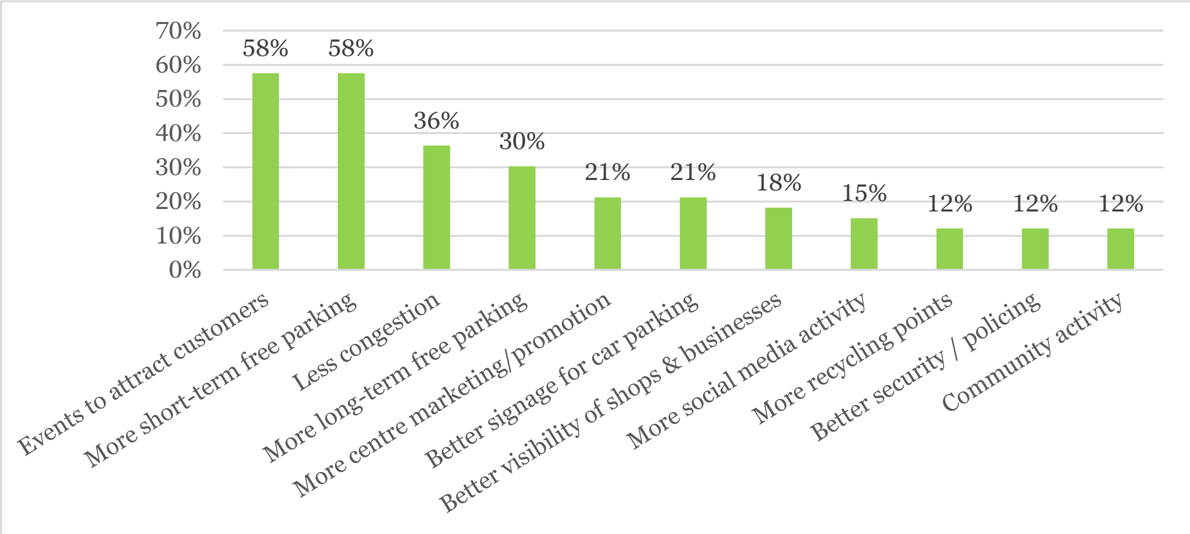
5.164 In regards improvements wanted to the mix / offer, businesses told us they want to see:



5.165 Businesses want a stronger offer, more shops, more variety, more independents. They would also like to see a better food offer, be that catering, evening and daytime offers, more convenience foods and also an improved regular market offer.

Customer Experience

5.166 Businesses who took part in the survey were also asked their views on potential improvements to the customer experience, and the responses included:



5.167 Businesses in Sawbridgeworth clearly identify short term free parking as being a major issue in the town centre affecting the customer experience. Currently up to 30 minutes is free, thereafter charging occurs, with 70 pence for an hour, and then per hour thereafter. A third of respondents also identify more longer-term free parking is needed.

5.168 That said events to drive footfall is equally important as free parking. Less congestion is wanted by just over a third, understandable given the narrow streetscape. A number of aspects were identified by around 20% of respondents, included more promotion, improved signage and improved visibility of shops.

Customer Behaviour and Views

5.169 Sawbridgeworth's main source of regular customers is from Zone 5, from which 33% visit weekly. Sawbridgeworth does not achieve strong visit frequency from any other Zone given its localised catchment. 50% of Zone 5 respondents visit Sawbridgeworth less than once per year or never.

5.170 Only 38% of respondents in Zone 5 view Sawbridgeworth as their most visited centre.

5.171 Modes of travel are split into two main areas, car borne at 70% and walk-in at 24%.

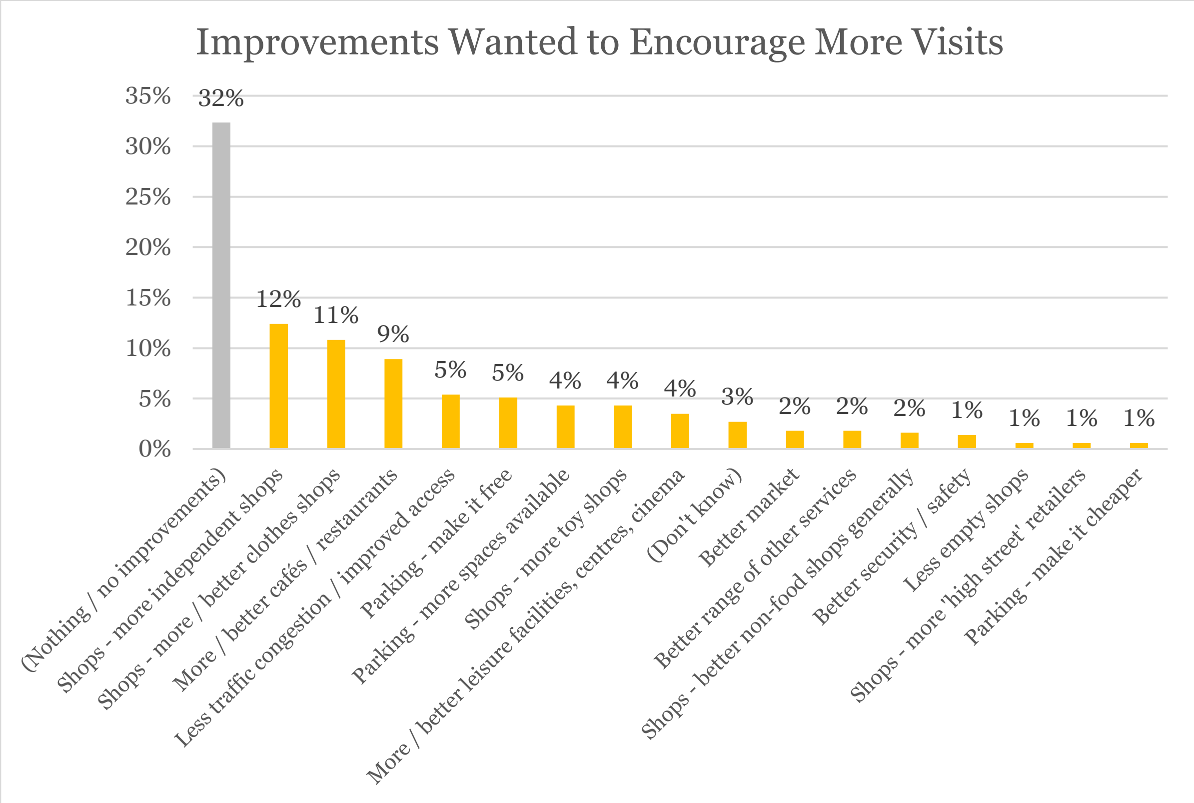
5.172 Interestingly for a small centre, the typical, most frequent visit duration into the town is for 1-2 hours at 35%. This is followed by 2-3 hours at 26%. Only 12% said they visit for less than 30 minutes, and 11% for between 30 and 59 minutes. This may reflect dominance of catering and service providers in the centre.

5.173 Circa 10% of respondents indicated they used markets in the town, a small sample base. The responses relate to visiting markets in other centres. 61% use the Bishop's Stortford Weekly Market. 28% use the Bishop's Stortford Monthly Market, and 25% use the Ware Weekly Market.

5.174 The improvements wanted to the markets visited in other centres include more fruit and veg stalls (28%), more quality (14%), more non-food stalls (17%) and more clothing stalls / more food to eat there (both at 14%).

5.175 The aspects respondents that indicated they liked about the centre, is dominated by the café / restaurant offer (20%) and 5% that like the independent shops. In terms of experience, 19% like the traditional / quaint feel and 11% like the friendly atmosphere. 8% said it was 'close to home', and 5% said nothing.

5.176 As demonstrated in the graph below, the largest aspect for improvement was 'nothing' at 32%. Of those that identified improvements, they were low level requirements. 11% want more clothes shops, 12% more independents, 9% more cafes and restaurants. 5% more free parking and 5% reduced traffic.



5.177 60% of Sawbridgeworth residents, zone 5, go out for a drink as a leisure activity at least monthly (adding weekly, fortnightly and monthly respondents). In terms of typical destinations these are varied and include Sawbridgeworth town centre at 30%, Bishop's Stortford Town Centre 20%, Harlow 23%, and Central London at 7%.

5.178 The number that go out to eat is higher at 75% (weekly, fortnightly and monthly responses combined). Destination locations are numerous and include 33% going to Harlow, 24% going to Sawbridgeworth Town Centre, 19% go to Bishop's Stortford and 7% each to Hertford and London.

Indicators of Health & Vitality

5.179 Customer numbers are holding their own for most businesses, with 55% being the same as last year. The number of businesses with increasing customer numbers is the same as those down, both being 21%. A positive result for the centre.

5.180 In regards sales trends, 42% said their sales were level on last year, and 24% said sales were up. Only 18% reported sales being down. Again given the regional and national outlook at the time of the survey, this is a strong performance.

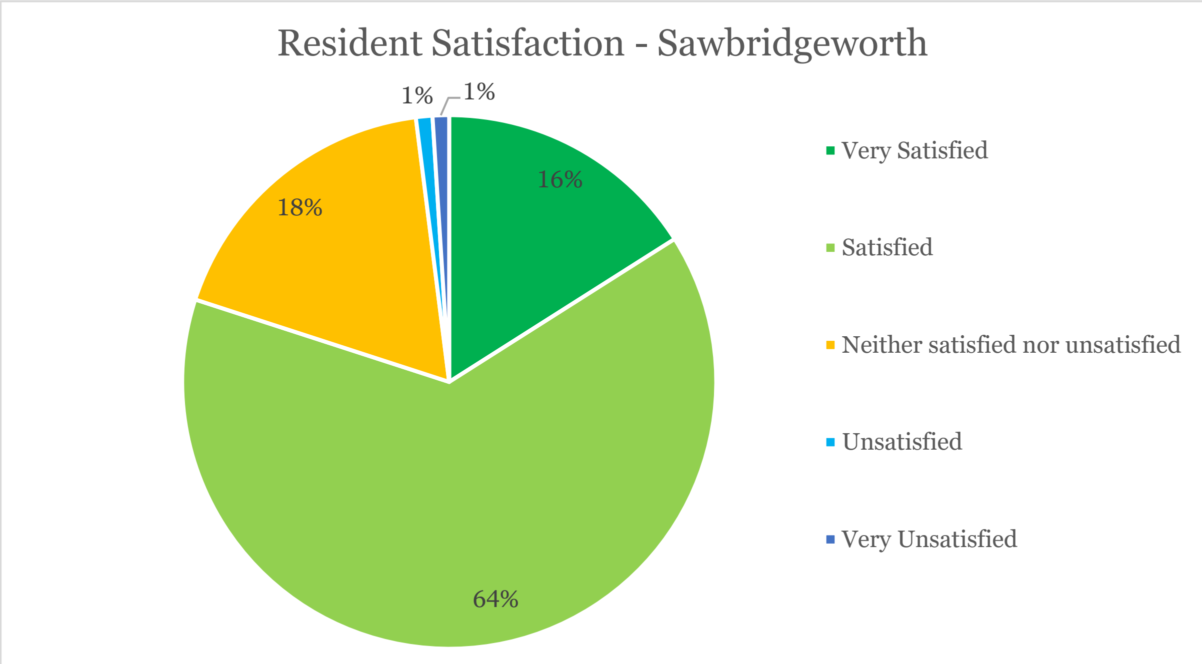
5.181 When asked how satisfied businesses are with Sawbridgeworth as a place to trade, 54% are satisfied, 36% neither / not, and only 6% dissatisfied.

5.182 In regards future trading prospects of trading in Sawbridgeworth, 48% of businesses are optimistic, 33% neither / nor and 15% are pessimistic.

5.183 The vast majority of businesses intend to stay in their current unit in Sawbridgeworth (96%), 4% want to move to larger premises in the town, only 3% want to move away.

5.184 Whilst only 58% of Zone 5 residents are visiting Sawbridgeworth as per last year, 30% are visiting it more, and 12% visiting it less, which is a positive visit trend.

5.185 Satisfaction levels with the centre are very positive, with many more being satisfied (80%) than dissatisfied (2%), which equates to a satisfaction ratio of 40:1. Only 18% of residents are undecided, which is the highest levels of satisfaction across the study area.



5.186 Footfall in Sawbridgeworth is well distributed across the length of Bell Street, from the junction with London Road across to Knight St / The Square.

5.187 Smaller centres tend not to have regular statistics on footfall levels experienced in the centre. The information from residents and businesses is consistent and indicates relatively strong footfall levels in the centre. Residents indicate that visit frequency is typically in line with last year, and a reasonable group are visiting more. Almost three quarters of businesses report customer numbers are either static or increasing. Businesses and residents are satisfied with the centre, residents particularly so.

5.188 Based on the latest occupancy information from Edozo (leading suppliers of commercial property information), Sawbridgeworth Town Centre has 62 retail and commercial units in the town centre (excluding residential and office units). Our place review identifies 3 vacant units, which therefore produces a vacancy rate of 5% for the town centre.

Identified Issues and Improvements Needed

The following table provides a SWOT analysis for Sawbridgeworth Town Centre.

Strengths	**Weaknesses**
Feel of place and environment is viewed as good	Lower than average visit frequency, low weekly visits
A reasonable walk-in customer base	Not the main centre to visit for most of immediate catchment
Popular for 1-2 hour and 2-3 hour visits	No direct local market offer, users have to go elsewhere for markets
Eating out and drinking out are popular activities for local residents, whereas Sawbridgeworth is more selected more for drinks	Mainly a car using customer, that can also choose to drive elsewhere
Users like the food and beverage offer, café & restaurants	Customers typically choose to go elsewhere for eating
Satisfaction levels from residents are highest in study area	Choice / offer of town centre not particularly liked
Businesses are positive about trading in the town	More choice and activity is needed
Businesses want to stay in the town	More free parking is being requested by

	businesses, although it's not a major factor for consumers
Trading is good for many businesses	
Opportunities	**Threats**
Encourage more customers to walk into the centre, building on the already established habit	The success of the town emphasises some of the facilities issues
Improve the frequent trips offer, more food / convenience	Experience when visiting other centres exacerbates issues in Sawbridgeworth
Add more visiting and temporary uses, potentially utilising the existing / available parking areas	Lack of visible improvements
Improve public realm and facilities for pedestrian customers	Increased congestion
Make centre feel less car oriented and encourage less non-vehicular trips	

Healthcheck Summary

5.189 Sawbridgeworth Town Centre is evidently thriving and in good health.

5.190 Whilst there are a few grumbles from businesses in the town centre about a lack of free short-term parking and the need for more events to drive footfall, the town centre is evidently attracting good levels of footfall and custom.

5.191 Other positive observations include there is only one vacant unit in the centre, and many of the shop units are well maintained internally by the occupants and also the external façade / frontages appear well maintained by the building owners.

5.192 Businesses report good levels of performance and they are optimistic about the future prospects in the town centre. Consumers are also positive about the town centre offer, indeed at the highest rates in this study out of all five town centres included.

5.193 The challenge for Sawbridgeworth Town Centre is to maintain and grow the current levels of positive trading and the goodwill this generates.

Buntingford

Overview

5.194 Buntingford is a market town and civil parish, located at the centre of a large rural area in the northern part of the District. The town has developed in a valley setting astride the River Rib and the Roman Road Ermine Street and is surrounded by open countryside. The A10 by-passes the town, connecting Ware in the south to Royston and Cambridge to the north. In addition Stevenage, Letchworth Garden City and Bishop's Stortford are all fairly equidistant surrounding centres.

5.195 Being surrounded by an extensive rural hinterland enables Buntingford to function as an important rural service centre for the outlying villages. Despite its small size, the town has an extensive range of services and facilities that serve the day-to-day needs of residents, and a vibrant local community demonstrated by the numerous clubs and societies that are active in the town.

5.196 The historic core of the town, centred on the High Street, is an attractive location which supports local independent traders and a weekly market. The town is served by two small supermarkets, but residents have to travel to larger nearby towns for comparison shopping trips. Buntingford is therefore regarded as a Minor Town Centre.

5.197 In regards the primary research for this project, 25 businesses took part in our business survey, one stakeholder completed a survey and just over 120 residents completed surveys in the Zone 4 Buntingford residential zone.

Accessibility & Environment

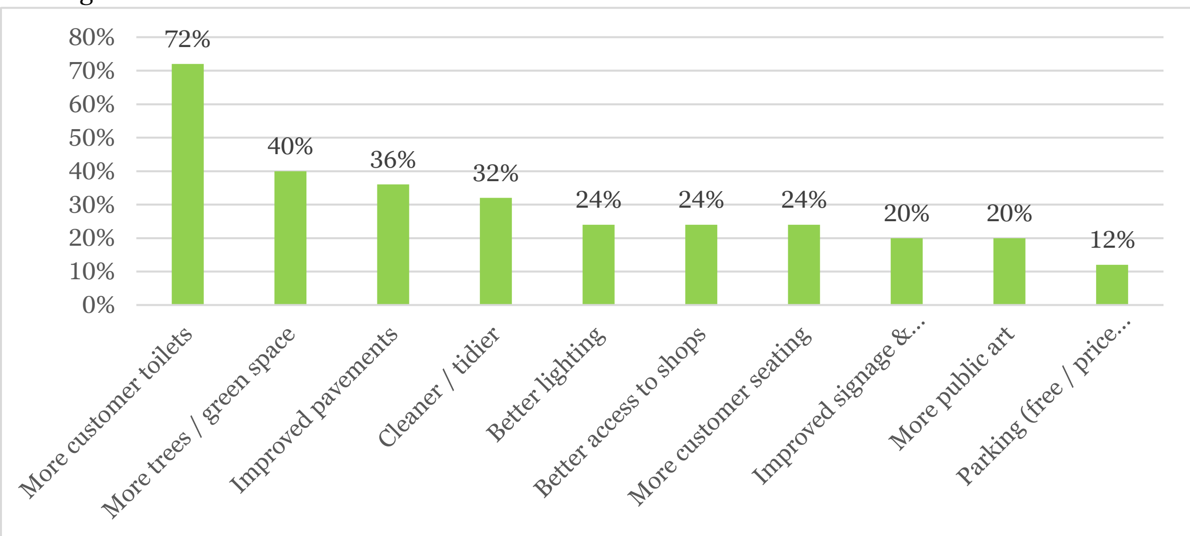
5.198 Buntingford benefits from good road connections, with easy access north and south via the A10.

5.199 Buntingford is the only town in East Herts that is not served by a railway, and bus service connections to other settlements are limited, resulting in a reliance on the private car as a means of transport to access larger nearby settlements for employment and leisure purposes. However, this relative remoteness has enabled the town to retain its market town character. It is reasonably well served by bus transport, which can be used to access the nearest stations as follows:

- Royston Station: Located about 8 miles north (approx. a 12-minute drive or a short trip on the number 18 bus)
- Hertford East Station: Located roughly 11 miles south (connected by the number 331 bus)
- Stevenage Station: Located about 11 miles west (connected by the number 37 bus).

5.200 Buntingford offers a variety of parking facilities, on street bays for short term use along its High Street area, the Council Car Park at Bowling Green Lane provides 104 spaces. The Co-op food store also has limited time free parking.

5.201 Businesses told us they would like to see the following the improvements to the public realm of Buntingford Town Centre:

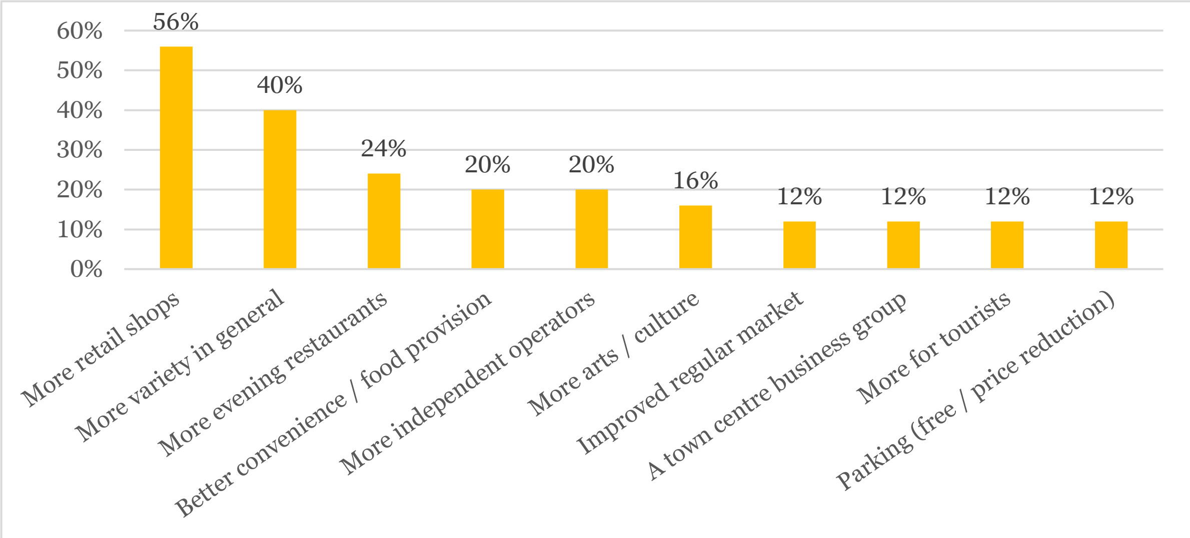


5.202 The provision of public toilets is a priority public realm improvement. More trees / green spaces, improved pavements and cleaner / tidier are also key improvement areas. Again a fairly long list that also includes better lighting, access, seating, signage and parking (again).

Diversity of Uses and Retailer Representation

5.203 In the sample of 25 businesses that completed our survey, 40% were retail shops, 28% retail services, 8% cafe / restaurant, and 8% financial services. Service provision is a key part of the centre offer.

5.204 In regards improvements wanted to the mix / offer, businesses told us they want to see:



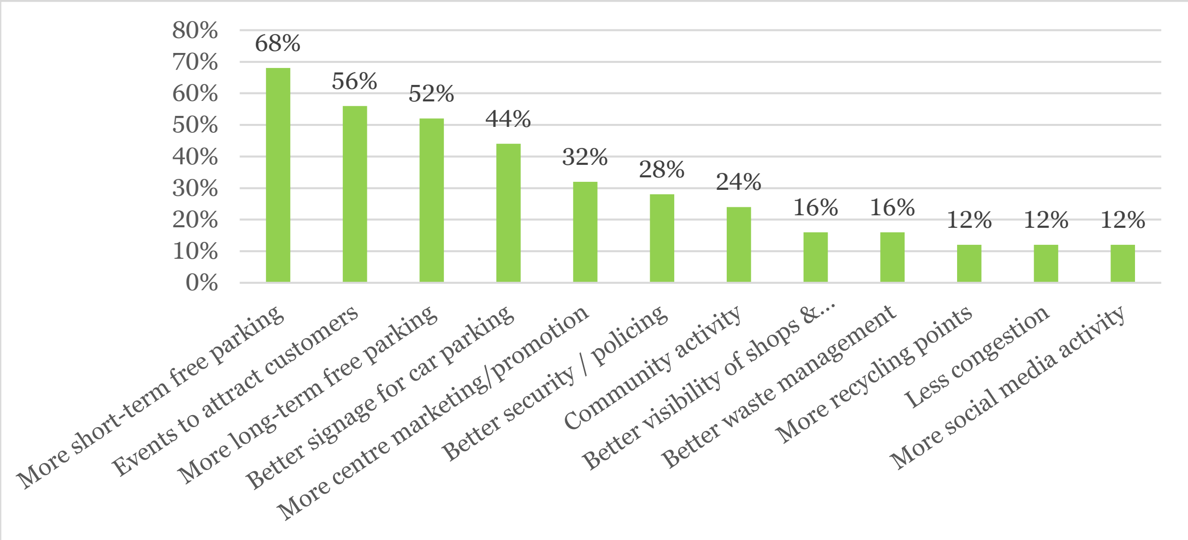
5.205 Businesses most want to see more retail shops, and more variety in general. The next set of improvements to the offer, include more evening catering, more convenience food stores and more independent businesses.

5.206 The town centre offer currently consists of a good and broad split of specialist convenience goods providers (including Sainsbury and Co-op), complemented by a few specialist comparison good (including two clothing stores), extensive range of beauty services providers and specialist personal services (osteopath, dentist, optician etc).

5.207 Both the daytime as well as evening food offer are good, including specialist providers such as two fish and chip shops, separate Indian, Chinese and Turkish operators plus three pubs serving food.

Customer Experience

5.208 Businesses who took part in the survey were also asked their views on potential improvements to the customer experience, and the responses included ...



5.209 Car parking issues dominate three of the top four responses from businesses, including more of the free short and long-term parking plus improved signage for parking.

5.210 Beyond car parking, other experience improvements businesses would like include more events and promotion to attract customers to the centre. For a small centre there is quite a list of improvements requested.

5.211 Whilst several businesses weren't open or actively trading during the day at the time of our review, only two units appeared to be actually vacant.

Customer Behaviour and Views

5.212 Buntingford's main source of regular customers is from Zone 4, from which 54% visit weekly. Buntingford does not achieve strong visit frequency from any other zone.

5.213 56% of Zone 4 residents view Buntingford as their most regular destination.

5.214 Modes of travel are split into two areas, car borne at 77% and walk-in at 20%.

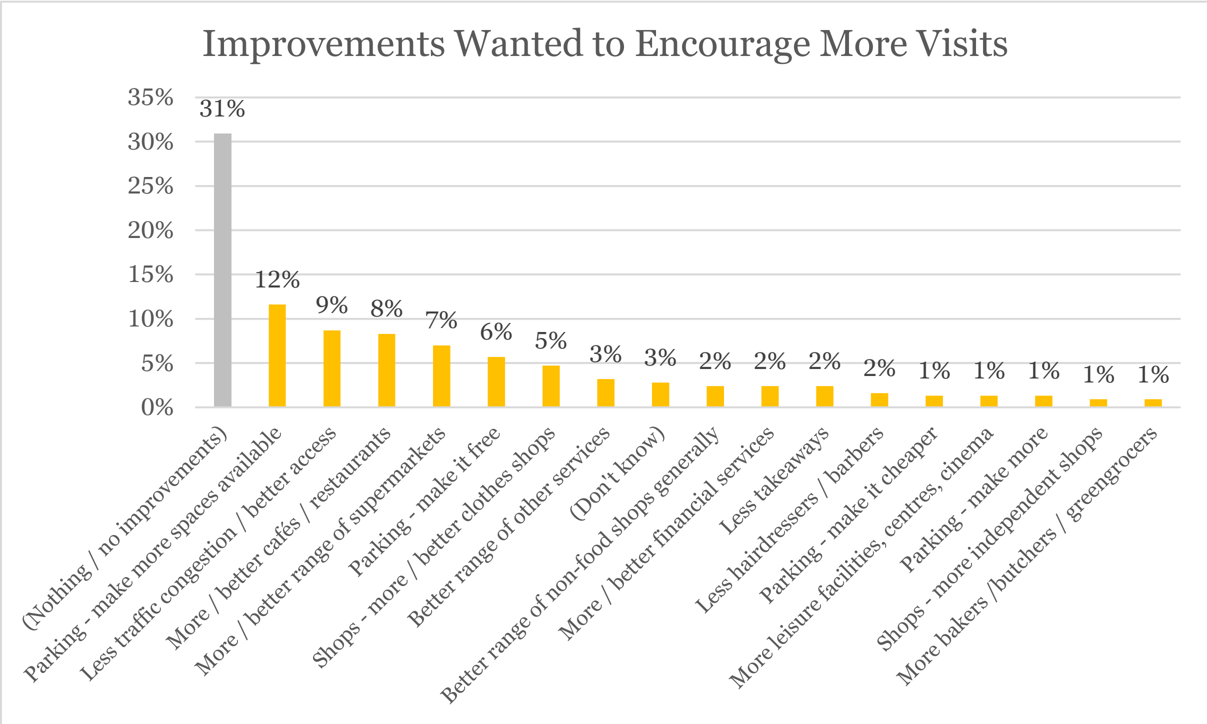
5.215 The typical, most frequent visit duration into the town is for less than 30 minutes at 39%. This is followed by visits for 1-2 hours at 23%. 17% visit for 30 minutes to an hour, and 11% are for 2-3 hours. Buntingford is primarily used as a place to 'pop in' / as a top-up shop.

5.216 Circa 29% of Zone 4 respondents indicated they used markets in the town. The regular weekly Monday Market is most popular with its users, 79% of Zone 4 market user respondents use it. 7% of the Zone 4 market users, use the Hertford Farmers Market and 6% of them use Hertford Saturday Market. The number of overall users could be improved with a better offer.

5.217 Improvements wanted to markets include lower prices (21%), more quality (15%) and more fruit and veg stalls (7%). A further 37% provided no response to this question.

5.218 The dominant 'like' about the centre is it being 'close to home'. Beyond this (all at single digit percentages) they like the café / restaurant offer (9%), independent shops (8%), affordable shops (6%) and a particular shop (6%). 6% said nothing.

5.219 As can be seen in the graph below, in terms of improvements, 31% said nothing / provided no response. Beyond this, residents want more parking (12%), free parking (6%) and reduced traffic / improved access (9%). Improvements to the offer included more cafes and restaurants (8%), along with an improved supermarket offer (7%).



5.220 59% of Buntingford residents in Zone 4 go out for a drink as a leisure activity at least monthly (adding weekly, fortnightly and monthly respondents). In terms of typical destinations these are varied and include Buntingford Town Centre (31%), Hertford Town Centre (11%), Standon (7%) and Central London (5%).

5.221 The number that go out to eat is higher at 75% (weekly, fortnightly and monthly responses combined). Destination locations are numerous and include Hertford Town Centre (21%), Buntingford Town Centre (18%), Stevenage (11%), Ware and Bishop's Stortford (both at 7%) and finally London (6%).

Indicators of Health & Vitality

5.222 40% of businesses in Buntingford report that customer numbers are same as last year, and 32% are seeing decreasing numbers, whilst 28% are increasing. This is broadly a static picture.

5.223 Unfortunately sales trends are not so level, with 40% reporting a decrease in performance, 36% on par with last year and only 16% are up. Whilst this shows business is challenging, more businesses are level or up than down.

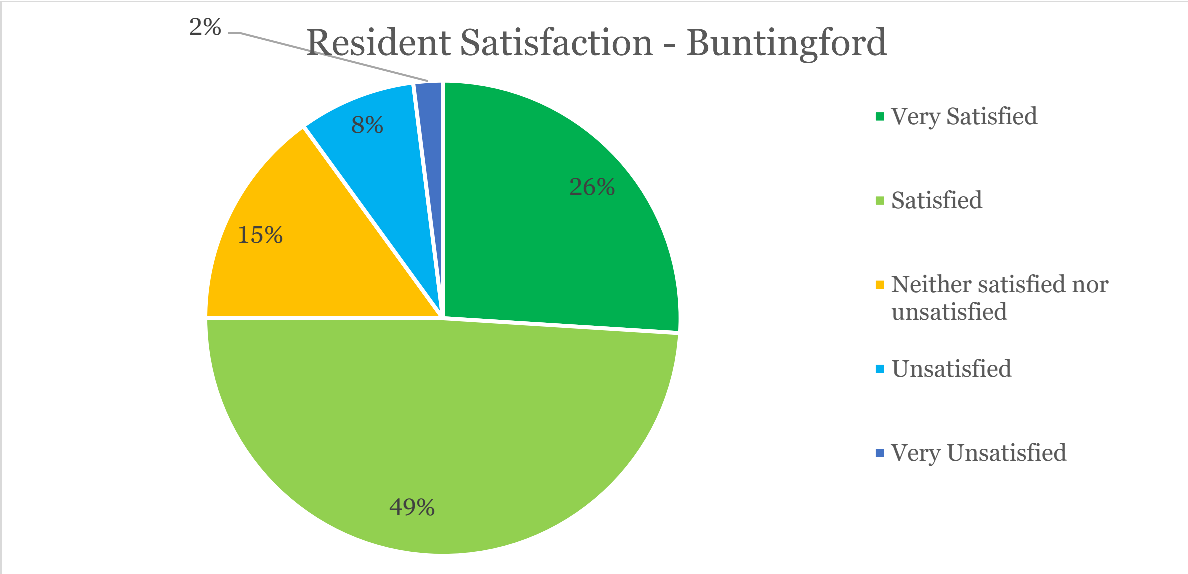
5.224 Unsurprisingly satisfaction levels mirror that of customer and sales trends. Almost a third (36%) being satisfied, a third in the middle (32%) and a third being dissatisfied 32%.

5.225 In regards to future trading prospects of trading in Buntingford, again it is a challenging outlook. Only 40% are optimistic, 36% are pessimistic (and one third of these 12% overall are very pessimistic), 20% are undecided.

5.226 Despite the challenging trading, mixed satisfaction levels and pessimistic outlook, all business that were surveyed plan to stay trading in Buntingford.

5.227 77% of those that visit Buntingford are doing so at the same frequency as last year, and 17% are visiting more, a very positive finding.

5.228 Satisfaction levels with the centre are very positive, with many more being satisfied (75%) than dissatisfied (10%), equating to a satisfaction ratio of 7:1, and only 15% of residents are undecided. Another very positive satisfaction rating, for one of the smaller centres.



5.229 Smaller centres tend not to have regular statistics on footfall levels experienced in the centre. In Buntingford the town centre has good levels of footfall distributed across the town centre, especially on the High Street from Sainsbury Local down to Jacksons Court.

5.230 Furthermore, residents indicate that visit frequency is typically in line with last year, and a reasonable group are visiting more. Businesses report customer numbers are evenly split between, static, decreasing or increasing. The business outlook is fairly cautious, although they expect to stay. Businesses and residents are satisfied with the centre, residents particularly so. The information from residents and businesses is consistent and indicates relatively stable footfall levels in the centre.

5.231 Based on the latest occupancy information from Edozo (leading suppliers of commercial property information), Buntingford Town Centre has 52 retail and commercial units in the town centre (excluding residential and office units). Our place review identifies 3 vacant units, which therefore produces a vacancy rate of 6% for the town centre.

Identified Issues and Improvements Needed

The following table provides a SWOT analysis for Buntingford Town Centre.

Strengths	**Weaknesses**
Most visited centre for over half of catchment	Customers are choosing to go elsewhere for socialising, drinks and eating (particularly eating)
Good frequent visit patterns, over 50% weekly visitors	Not many likes about the centre, appeal is convenience
Car borne and walk-in customers	Choice / offer of town centre not particularly liked
A convenient centre to use	Lots of improvement areas identified, facilities, public realm, environment and offer
Good for short visits and also 1-2 hour visits	More food and beverage is needed
Markets are popular, although consumers, businesses and stakeholders all want them improving (more stalls, more choice and more quality)	Improved supermarket offer
Eat and drink are popular with residents	Parking is identified as the dominant issue for businesses and residents, although a lower proportion of residents identified it as an issue

Satisfaction levels are among the highest in the study area	
Local and loyal resident base, using the centre for top up visits and a variety of services	
Opportunities	**Threats**
Improve the convenience of using Buntingford	Lack of perceived / visible improvements could lead to increased leakage to other centres, especially Hertford and Bishop's Stortford
Improve the markets offer (as described in strengths above)	Wider experiences of customers in other centres highlight deficiencies in Buntingford and footfall declines
Build on customer loyalty and high visit patterns	Local marketing and promotional activity fails to compete with larger centres, in and out of District
Add more visiting offers / events / themed markets / celebrations	
Improve physical realm, cleaning and customer facilities	
Introduce more greening and planting to high street	

Healthcheck Summary

5.232 Buntingford Town Centre is in a good place in regards its health & vitality. Its offer is in line with the needs of local residents, being focussed and dominated by frequently bought products and retail services.

5.233 The town is trading well, businesses, consumers and stakeholders like it and are positive about its offer and experience. Vacancies are low as a result.

5.234 The main improvements needed according to businesses are better / more parking as well as more events / better marketing of the town centre offer to drive footfall to it.

5.235 Consumers and businesses would like to see an improved markets offer, improved cleaning, environment and facilities.

District / Neighbourhood Centres and Local Parades

5.236 For this Study, we have assessed some of the centres identified Table 16.1 of the District Plan comprising *District and Neighbourhood Centres, and Local Parades* (paragraph 16.8.6) to identify the common characteristics and content for each band of centre.

5.237 The assessment has been completed as a desk-based exercise using available online information, place reviews and responses from residents to the household survey. The centres and parades selected have been chosen to give a geographic and format spread / representative sample of centres across the District.

5.238 The exercise has informed our recommendations (included in section 9 of this report) in relation to the East Herts hierarchy of centres, in particular which centre(s) should be classified as District Centres; and further enables the Council to consider whether any of the locations identified in Table 16.1 fulfil the role and function of a Local Centre; or whether they comprise *"small parades of shops of purely neighbourhood significance"* citing the abovementioned NPPF definition of town centres.

5.239 District centres generally comprise a group of shops, separate from the town centre, with at least one supermarket or superstore, together with a range of non-retail services and public facilities. Therefore, in order to reflect the important role played by the Thorley Centre in Bishop's Stortford in terms of the local provision of food shopping (from a full range store) as well as services and food & beverage, the centre is currently identified as a District Centre.

5.240 Located in the south west part of the urban area of the town, the Thorley Centre is a purpose-built centre anchored by a large Sainsburys supermarket, extensive shared parking for all businesses. The offer includes a pharmacy, newsagent, hair and beauty, a selection of takeaways, café, dental and health centres, dry cleaners / laundry services. These offers and uses combine to create an established, busy and popular district centre.

5.241 The Bishop's Park Centre located due west of the town centre close to the A120 ring road in Bishop's Stortford is similar to the Thorley Centre, in that it provides a local destination for food shopping and services. This fundamentally is a large Tesco supermarket, with associated brands including Costa Coffee, Timpson's and a filling station. There is a separate building that accommodates a dry cleaners and charity shop, plus a community hall with classes and social uses.

5.242 Neighbourhood centres and local parades support the day-to-day needs of communities, providing opportunities for local top-up shopping and access to services and social interactions. Quite often they are essential for those less able to travel to town centres or larger retail centres. It is therefore important that these local centres provide the type and range of retail and commercial uses necessary to serve and support the local community.

5.243 The District Plan identifies that, *New neighbourhood centres will be provided in strategic developments at Whittington Way (Bishop's Stortford); Birchall Garden Suburb (East of Welwyn Garden City); Gresley Park (East of Stevenage) and the Gilston Area*. We understand at the time of drafting the report that only Whittington Way (Bishop's Stortford South) has started to emerge. Although looking at Gilston Area as an example, the outline planning permission for the seven villages has been granted, and the plans clearly include the provision of new neighbourhood and community facilities. Snowley Parade is a Local Parade in Bishop's Stortford, on the north east side of the town. It offers over 12 premises, anchored by a Morrisons Daily convenience store along with a further mix of convenience and service providers. The parade is well occupied and seems to be a consistent offer compared to historic 'Streetview' images. Whilst offering more units than a Neighbourhood Centre, it lacks the scale of anchor.

5.244 Kingshill Shops, located in North Ware, is designated a Local Parade (or Neighbourhood Parade). This is identified in the 2023 Ware Neighbourhood Plan as an important out of town retail centre for employment. This 9 unit centre remains occupied and trading, with many of the long term businesses still being in situ. The centre has onsite parking and is in a densely populated area. There is no reason to change its classification.

5.245 Cromwell Road Shops on the east side of Ware, is another small Local Parade, also identified as an important out of town retail centre for employment in the Ware Neighbourhood Plan. This is a small parade of three units underneath low rise flats above. Anchored by a Premier Foods convenience shop, plus a take-away and a barbers. At the smaller end of Local Parades, and clearly unlikely to change its role offer and scale.

5.246 Hertford provides only Local Parades (Neighbourhood Parades). One is Fleming Crescent Local Parade in the west of the town, towards Welwyn. It offers a Co-op convenience store, community centre, takeaways, café, service providers, other food convenience stores, a pub and catering providers. There is available parking in this purpose built centre.

5.247 The other is The Avenue, to the north of the town, a smaller parade of shops, consisting of 6 occupied units, a café, newsagent, pharmacy, pets / vets and a hair and beauty salon.

5.248 Beyond the larger towns, there are a few Local (Neighbourhood) Parades in villages, listed as Puckeridge, Standon, Stanstead Abbotts and St Margarets, then Watton-at-Stone. Looking at Puckeridge (which is south of Buntingford) this is a pretty but small village centre offering a small convenience shop, a pub, café, pharmacy and a hair salon.

5.249 Another village local parade is in Watton-at-Stone (towards Stevenage). Here the offer is more dispersed through the village, rather than a single parade. It includes a café / farm shop, hair salon, a dentist, 2 pubs, barbers, Budgens convenience store / post office, a bakery and takeaway.

5.250 Notwithstanding the delivery of any new centres, district or parade centres in line with the building and occupancy of new housing stock / new 'villages' there is little hard evidence or reason to suggest changes to the status of the existing lower order centres. Most, if not all (where space / units are available), have a mix and offer that is in line with contemporary customer needs. There is nothing to suggest they will not continue to serve the useful purpose they already do.

6. Retail Capacity: Approach and Baseline Evidence

6.1 In this section, we outline our approach to retail capacity forecasting. We then set out the baseline assumptions and forecasts underpinning the assessment of new retail (convenience and comparison goods) floorspace capacity in East Herts over the plan period.

6.2 Our capacity forecasts distinguish between convenience goods and comparison goods, defined as follows:

- Convenience goods: *Food, alcoholic drink, tobacco products, newspapers and periodicals, non-durable household goods.*
- Comparison goods: *Clothing and footwear; household textiles and soft furnishings; Furniture and floor coverings; household appliances; audio visual equipment; hardware, DIY goods, decorating supplies; chemist and medical goods, cosmetics and beauty products; books, jewellery, watches, china, glassware and kitchen utensils, recreational, personal and luxury goods.*

Approach

6.3 Our assessment uses an Excel-based retail capacity model, applying the most up-to-date baseline evidence available including a new household survey conducted by NEMS in late January/February 2026.

6.4 Consistent with good retail planning practice, we forecast the expenditure-based capacity for new retail floorspace as follows:

- calculate the total amount of convenience and comparison goods expenditure available within each of the 6 zones comprising the catchment area, at the base and forecasting years (as defined below);
- allocate the available expenditure to the area's shopping destinations based on the results of the 2026 household survey to estimate current sales and forecast future sales in each shopping destination;
- identify any committed developments (i.e. retail floorspace with planning permission and/or under construction) and assess their likely turnover contribution to future sales; and
- compare the estimated sales in the area's shopping destinations with existing floorspace, so as to assess the current trading performance of each shopping destination and the capacity to support additional convenience and/or comparison goods floorspace (after allowing for any committed developments).

6.5 We set out below further details relating to the scope and format of the quantitative retail capacity assessment.

Catchment area

6.6 As set out in section 4 above, we have adopted the same catchment area (and zones) as the 2013 Study. The catchment area zones are based on postcode geography[11] and extend beyond the administrative boundary of EHDC to reflect shopping patterns and expenditure flows.

6.7 A map of the catchment area showing the 6 zones is included at Appendix A.

[11] Refer to Table 1 at Appendix C for details of the relevant postcode sectors.

Shopping destinations and scenarios modelled

6.8 The shopping destinations modelled are shown in Figure 6.1 below.

Figure 6.1 – Shopping destinations modelled

Bishop's Stortford Town Centre
Hertford Town Centre
Buntingford Town Centre
Sawbridgeworth Town Centre
Ware Town Centre
Other Centres in East Herts (as a group)
Madford Retail Park, Hertford
Other non-central stores in East Herts (as a group)

6.9 We assess the 'baseline' scenario for new retail floorspace in East Herts, in which we assume that the 2026 pattern of market shares of convenience and comparison goods expenditure in each of the area's shopping destinations – as indicated by the new household survey – remains unchanged throughout the forecasting period. The implicit assumption in this scenario is that any new retail floorspace (or 'lost' retail floorspace e.g. through redevelopment and/or change of use to non-retail) would not change the market shares of expenditure attracted from the catchment area. This 'constant market share' approach is widely used and accepted for strategic retail capacity forecasting.

6.10 We have not prepared capacity forecasts for convenience goods floorspace at Madford Retail Park, Hertford. This is because it lacks any notable convenience retail offer and thus does not feature in the results the household survey.

Base and forecasting years

6.11 We have used 2026 as the base year for our retail capacity forecasts. The model therefore provides estimates of current sales in each of the shopping destinations as at 2026.

6.12 As agreed with EHDC, we have prepared capacity forecasts at 2029, 2034, 2039 and 2044 (so as to cover the forthcoming plan period).

Limitations of retail capacity forecasting

6.13 It is important to note that the retail capacity forecasts serve only as a guide for future planning policies, development frameworks and/or decisions on planning applications. They are not prescriptive and the further ahead the forecasting year, the less certain the forecasts. Accordingly, EHDC should be aware that capacity forecasts beyond five years should be treated with a degree of caution, as they are based on various assumptions and forecasts that can and will change. Forecasting accuracy, even over the next five years, is also uncertain due to changing macro-economic conditions and the potential ramifications of the Iran war.

Format of the retail capacity tables

6.14 In the remainder of this section, all references to *Tables* are those comprising our up-to-date assessment of new retail floorspace capacity set out at Appendix C:

- Tables 1 to 5 show the population and expenditure forecasts for the catchment area.
- Tables 6 to 13 are the tables for Bishop's Stortford Town Centre. Tables 6 and 7 indicate the pattern of market shares of expenditure on each category of convenience and comparison goods respectively attracted from the catchment area, as indicated by the 2026 household survey. Table 8 provides an overview of the pattern of market shares for Bishop's Stortford Town Centre. Table 9 is the product of Tables 5 and 7, indicating the amounts of expenditure on each comparison goods sub-category attracted. Table 10 sets out forecast retail sales for both convenience and comparison goods, on a zone-by-zone basis and overall. Table 11 accounts for the sales capacity of existing main foodstores and other convenience goods shops in the Town Centre, and Table 12 sets out any committed retail developments and their expected sales levels (for both convenience and comparison goods). Table 13 brings together the expenditure attracted, existing floorspace and commitments to arrive at the retail capacity forecasts for Bishop's Stortford Town Centre. It also shows (in the bottom row) the overall market shares of catchment area expenditure on convenience and comparison goods attracted by the Town Centre.
- Thereafter, we have modelled Hertford Town Centre (Tables 14 to 21); Buntingford Town Centre (Tables 22 to 29); Sawbridgeworth Town Centre (Tables 30 to 37); Ware Town Centre (Tables 38 to 45); and Other Centres in East Herts (Tables 46 to 53). These tables follow the same arrangement as the tables for Bishop's Stortford Town Centre.
- Tables 54 to 62 are the tables for the 'non-central' Madford Retail Park, Hertford. These tables follow the same arrangement as the tables for Bishop's Stortford Town Centre; however, an additional table is included (Table 60) indicating 'benchmark' comparison goods sales in the existing retail warehouses.
- Tables 63 to 71 are the tables for Other non-central stores in East Herts. These tables follow the same arrangement as the tables for Madford Retail Park, Hertford.

Baseline Evidence

6.15 The principal data inputs and assumptions underpinning the new retail capacity forecasts are set out below.

Household survey of shopping patterns

6.16 As mentioned in section 4, we have designed and commissioned a new household survey of shopping patterns in the catchment area – the results of which are included at Appendix B. It covered the area shown on the map at Appendix A which was divided into the 6 catchment zones identified, consistent with the 2013 Study.

6.17 A total of 806 interviews were undertaken by NEMS in late January/February 2026, distributed across the 6 catchment zones to ensure a minimum of 100 interviews per zone. These interviews took the form of a standard telephone interview survey as well as an online self-completion format.

6.18 The survey asked questions about households' shopping habits for main food and top-up food (i.e. convenience goods) shopping. The survey also asked questions about households' shopping habits for 8 different sub-categories of comparison goods shopping (these sub-categories are closely matched with the widely recognised retail expenditure categories to ensure compatibility with the capacity model). We have combined the results of Questions 17 to 24 of the household survey to provide weighted average market shares of all comparison goods expenditure attracted to each of the shopping destinations modelled, using weights according to the amount of expenditure on each of these 8 sub-categories of comparison goods shopping. These are set out in Table 4 (bottom row) of the capacity model included at Appendix C

6.19 The household survey research therefore provides a detailed picture of where households in each of the 6 catchment zones do 'most of' their shopping for convenience goods and the 8 different categories of comparison goods. This is common practice for a survey of this nature, since it is not practical within the limitations of the sample to quantify how much households spend on convenience goods and the various categories of comparison goods, and where and how often. Shopping patterns are too dynamic and unpredictable. Accordingly, the results of the household survey do not directly indicate actual expenditure flows but are the best available data to use as a proxy for modelling retail expenditure flows from residential areas to shopping destinations.

6.20 It should be recognised, as noted previously, that such household surveys often tend to over-emphasise comparison goods shopping in larger centres and stores; and under-represent it in small centres. The main reason is because in a small sample survey, the probability of interviewing the small number of people who use small centres is much less than the probability of interviewing the much larger number of people who use larger centres. It is also sometimes the case, in our experience, that convenience goods shopping is under-represented in those larger centres which mainly function as comparison goods shopping destinations.

Catchment population

6.21 Catchment population data has been supplied in the form of the latest Experian Retail Planner data (dated January 2026) which includes current estimates and the projected future population of each catchment area zone. The result is that, for the catchment area as a whole, the population is expected to increase from 204,044 in 2026 to 217,671 by 2044 (representing an increase of about 6.7%).

Per capita expenditure

6.22 The latest Experian Retail Planner data sets out average per capita[12] expenditure on convenience and comparison goods in each catchment area zone, at the various forecasting years. These estimates and forecasts take account of differences in average per capita expenditure on convenience and comparison goods from zone to zone. The resulting estimates and forecasts of per capita expenditure on both convenience and comparison goods, including expenditure on Special Forms of Trading, are set out in the top half of Table 2 at Appendix C.

6.23 The forecast growth in per capita expenditure in Table 2 is specific to the catchment area. The use of such local growth forecasts is expected to be more reliable than relying on national forecasts. Notwithstanding, they broadly reflect UK-wide expenditure trends.

Special Forms of Trading (SFT)

6.24 We have made deductions from the per capita expenditure figures supplied by Experian to allow for expenditure via SFT. This includes online shopping, mail order and expenditure at temporary market stalls; and is therefore expenditure not made in shops and stores. Table 2 shows the growing deductions we have made.

6.25 We have applied an SFT deduction of 5.4% for convenience goods expenditure in 2026, increasing to 7.7% by 2044. Our SFT deductions for comparison goods expenditure are much greater; from 26.1% in 2026 to 32.5% by the end of the forecasting period.

6.26 These deductions are based on Experian's Retail Planner Briefing Note 23 (published March 2026). Whilst the total volume of online retail sales is greater than the percentages assumed within the model, it is necessary to recognise that, with the growth of multi-channel retailing, physical stores can function as showrooms and a source of stock for online-based sales. Therefore, not all online retail sales are 'lost' from the turnover of physical stores and our SFT deductions seek to account for this.

Total available expenditure in the catchment area

6.27 The combined effect of the forecast growth in population and per capita expenditure (after deducting expenditure on SFT) is that we expect total catchment area expenditure on convenience goods to increase by about £1.9m (approximately 0.3%) over the period 2026 to 2044; as set out in Table 3 of the model.

6.28 For comparison goods, we expect total catchment area expenditure to increase by about £367m (approximately 52%) over the period 2026 to 2044. This compares with growth in the total catchment area population of around 6.7% over the period. Thus, only a relatively small proportion of the growth

[12] The per capita expenditure data represents people of all ages whose usual place of residence is a private household. This excludes any people living in communal establishments (e.g. care homes, student halls of residence, prisons).

in catchment area expenditure on comparison goods is accounted for by forecast growth in population. This means that the comparison goods floorspace capacity forecasts are particularly insensitive to population growth assumptions, principally because:

- Any population growth is likely to be only a small proportion of total catchment area population (and its available expenditure); and
- The expenditure arising from any population growth is likely to be attracted by a number of shopping destinations (as shopping patterns vary greatly), therefore having only a small effect on capacity forecasts in any individual centre.

6.29 The comparison goods floorspace capacity forecasts are much more sensitive to the assumptions about growth in per capita expenditure, however, especially in the later part of the forecasting period. This underlines the need to review the capacity forecasts at regular intervals over that period.

Visitor expenditure

6.30 For both Bishop's Stortford and Hertford Town Centres, allowances have been made for convenience goods expenditure by visitors who live outside the catchment area (or 'inflow' expenditure). Reflecting their appeal as 'day out' destinations for cultural activities and events, we have assumed that the Town Centres are likely to attract inflow expenditure amounting to 3% (Bishop's Stortford) and 2% (Hertford) of total catchment area expenditure on convenience goods.

6.31 We have made no such allowance for the other shopping destinations modelled, given they are unlikely to secure substantial expenditure from outside the wider catchment area.

Existing shop floorspace

6.32 Information on the supply of existing shop floorspace in East Herts has been derived from several sources including the 2013 Study, Edozo Occupiers and EHDC.

Committed shop floorspace

6.33 We have included in the model any notable retail commitments in East Herts (i.e. retail development with extant planning permission). In particular:

- Land east of A10, Buntingford (application ref. 3/23/1447/OUT) as shown in Table 52 at Appendix C (i.e. identified as part of 'Other Centres in East Herts' within the capacity model). We understand the reserved matters for this local centre and the wider development have not been applied for. We have therefore made some high-level assumptions in Table 52 about the scale and type of retail floorspace likely to come forward as part of the new local centre.
- Bishop's Stortford North – western parcel (application ref. 3/19/2626/FUL) as shown in Table 52 at Appendix C (i.e. identified as part of 'Other Centres in East Herts' within the capacity model). The permission is for two local centres and we have made some high-level assumptions in Table 52 about the scale and type of retail floorspace likely to come forward within the 'western parcel' local centre. The eastern parcel has been excluded from the capacity model on the basis we understand the outline planning permission has lapsed; therefore, a new application is required for the development of the eastern parcel and its local centre.
- Bishop's Stortford South – off Whittington Way (application ref. 3/18/2253/OUT) as shown in Table 52 at Appendix C (i.e. identified as part of 'Other Centres in East Herts' within the capacity model). A reserved matters application has been submitted (application ref. 3/24/1528/REM) and this has informed the assumptions we have made in Table 52 about the scale and type of retail floorspace likely to come forward as part of the new local centre.
- Extension to Wickes, Unit 1, Madford Retail Park, Hertford (application ref. 3/25/1697/FUL) as shown in Table 61 at Appendix C (i.e. identified as part of 'Madford Retail Park, Hertford' within the capacity model).

6.34 We are aware that outline planning permission has been granted for the Harlow and Gilston Garden Town[13] (a significant part of which is located within the East Herts District). The proposals include retail floorspace; however, it is currently unclear when development is likely to come forward. The scale, format and type of retail floorspace is also unclear at this stage. The development is not therefore included as a retail commitment within our retail capacity modelling at this stage.

Growth in sales densities

6.35 We have assumed that both existing and new comparison goods floorspace will increase its sales density by approximately 2% per annum throughout the forecasting period. This allocates a proportion of the forecast growth in expenditure to existing shops and stores, before new floorspace becomes necessary.

6.36 We have made no allowance for any increase in the sales densities of convenience goods floorspace over the forecasting period.

[13] Application refs. 3/19/2124/OUT and 3/19/1045/OUT.

7. Retail Capacity: Forecasts

7.1 In this section, we set out and discuss the implications of our retail capacity forecasts for East Herts.

7.2 We have prepared individual forecasts for both convenience and comparison goods floorspace in each of the shopping destinations modelled, as shown in Figure 7.1 below, except for Madford Retail Park where we have only considered the expenditure capacity for additional comparison goods floorspace (in the absence of any notable convenience goods floorspace).

Figure 7.1 – Shopping destinations modelled

Bishop's Stortford Town Centre
Hertford Town Centre
Buntingford Town Centre
Sawbridgeworth Town Centre
Ware Town Centre
Other Centres in East Herts (as a group)
Madford Retail Park, Hertford
Other non-central stores in East Herts (as a group)

7.3 As outlined in section 6, our forecasts represent the 'baseline' scenario for new retail floorspace, in which we assume that the 2026 pattern of market shares of convenience and comparison goods expenditure (as indicated by the new household survey) remains unchanged throughout the forecasting period to 2044 – notwithstanding the potential impact of any new or replacement retail development and/or any existing shop floorspace 'lost' to alternative uses.

7.4 The capacity forecasts, particularly beyond the next five years, should be treated with a degree of caution as they are based on various assumptions and forecasts that can and will change. The uncertainty in forecasting long-term retail trends is recognised in the PPG, which states that assessments *'...may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed'* (paragraph 004). Therefore, greater weight should be placed on the capacity forecasts over the next 5-10 year period.

Convenience Goods Floorspace

7.5 Our forecasts in respect of the need for new convenience goods floorspace in East Herts are summarised in Figure 7.2 below.

7.6 Before we comment on the capacity forecasts, we would note that the forecasts are on the assumption that, where existing foodstores and other convenience goods floorspace is shown in the model to be trading above average benchmark levels, the sales density will fall to that benchmark level from 2029 onwards. In reality, however, some stores may continue to trade above (or below) average benchmark levels.

7.7 The forecasts are also on the assumption that potential new convenience goods floorspace would be delivered in the form of a new foodstore(s) trading at a 'generic' average sales density of £12,000 per sqm net. Some operators would trade above this level whilst other foodstores (and convenience goods shops) would trade below. Therefore, the format in which new convenience goods floorspace is provided will affect the amount of such floorspace that can be supported in terms of expenditure-based capacity.

Figure 7.2 – Summary of capacity forecasts: convenience goods (sqm net sales area)

	2029	**2034**	**2039**	**2044**	Table number (Appendix C)
Bishop's Stortford Town Centre	-1,350	-1,350	-1,300	-1,300	13
Hertford Town Centre	-300	-300	-300	-300	21
Buntingford Town Centre	-300	-300	-300	-300	29
Sawbridgeworth Town Centre	-50	-50	-50	-50	37
Ware Town Centre	600	600	600	600	45
Other Centres in East Herts (as a group)	-900	-850	-800	-750	53
Madford Retail Park, Hertford	-	-	-	-	-
Other non-central stores in East Herts (as a group)	1,900	1,900	1,900	1,950	71
Combined forecasts for East Herts	**-400**	**-350**	**-250**	**-150**	n/a

Source:
Tables 1-71, Appendix C (as indicated to the right).
Notes:
a) The forecasts are 'baseline' forecasts after allowing for the committed developments.
b) The forecasts are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.
c) Forecasts rounded to the nearest 50 sqm net.

7.8 Figure 7.2 shows, after allowing for commitments, there will be a limited theoretical over-supply of convenience goods floorspace in East Herts (all shopping destinations modelled as a whole) from 2029. It is assessed the amount of negative capacity is set to decrease from about -400 sqm net sales area to about -150 sqm net sales area by 2044.

7.9 Forecast levels of over-supply are greatest in Bishop's Stortford Town Centre (about -1,350 sqm net sales area by 2029). This – and the more modest levels of over-supply in the other centres (except for Ware Town Centre) – is offset by the positive capacity identified for the non-central stores in East Herts (about 1,900 sqm net sales area by 2029). Yet the overall picture across the District is one of a limited over-supply of convenience goods floorspace.

7.10 The negative capacity identified in Bishop's Stortford Town Centre is an indication that the centre's main foodstores and other convenience goods floorspace is trading below 'benchmark' levels. This is slightly surprising given the foodstore line-up includes Waitrose and M&S Food Hall, both key attractors for the Town Centre on the face of it, although they are older town centre stores and compromised to a degree by issues such as accessibility and store layout.

7.11 Meanwhile, the very modest levels of expenditure-based capacity forecasted in Ware Town Centre suggest existing convenience retail provision (which includes the Tesco store on West Street) is trading slightly above benchmark.

7.12 It is important to note that the positive capacity identified for the non-central stores in East Herts (modelled as a group) – a signal that many of these stores are likely to be over-trading – does not justify new 'non-central' foodstore development or extensions should proposals come forward; rather, the sequential approach should be applied. It is also to be noted that, where there is limited or no expenditure capacity to support additional convenience goods floorspace, as is the case for East Herts District as a whole, any new foodstore development or extensions will have the potential to have greater adverse impacts on existing centres/stores. This is because there is a direct correlation between capacity and impact.

7.13 Notwithstanding, with the combined forecasts for East Herts indicating limited over-supply (-400 sqm net sales area by 2029), we consider there is no demonstrable quantitative need to plan for additional convenience goods floorspace.

7.14 Given the evidence of under-trading in most of the main centres, particularly Bishop's Stortford Town Centre, the strategy should be focused on encouraging activity and linked-trips in those centres to support their existing convenience retail offers, or store refurbishments, as opposed to planning for new foodstores.

Comparison Goods Floorspace

7.15 Our 'baseline' capacity forecasts for comparison goods floorspace in East Herts are summarised in Figure 7.3 below.

Figure 7.3 – Summary of capacity forecasts: comparison goods (sqm net sales area)

	2029	**2034**	**2039**	**2044**	Table number (Appendix C)
Bishop's Stortford Town Centre	150	800	1,450	1,900	13
Hertford Town Centre	0	100	200	300	21
Buntingford Town Centre	0	50	50	100	29
Sawbridgeworth Town Centre	0	0	50	50	37
Ware Town Centre	0	100	200	250	45
Other Centres in East Herts (as a group)	0	50	50	50	53
Madford Retail Park, Hertford	450	500	600	650	62
Other non-central stores in East Herts (as a group)	-1,800	-1,700	-1,600	-1,500	71
Combined forecasts for East Herts	**-1,200**	**-100**	**1,000**	**1,800**	n/a

Source:
Tables 1-71, Appendix C (as indicated to the right).
Notes:
a) The forecasts are 'baseline' forecasts after allowing for the committed developments.
b) The forecasts are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.
c) Forecasts rounded to the nearest 50 sqm net.

7.16 Figure 7.3 shows that, after allowing for commitments (at Madford Retail Park) and for existing comparison goods floorspace to become more efficient by 2% per annum, there will be a limited theoretical over-supply of comparison goods floorspace in East Herts (all shopping destinations modelled as a whole) in 2029, amounting to about -1,200 sqm net sales area. However, in the longer term, due to stable/positive spending growth as currently forecasted by Experian, capacity for additional comparison goods floorspace is identified and will rise to about 1,800 sqm net sales area by the end of the plan period.

7.17 Positive capacity forecasts are most notable in Bishop's Stortford Town Centre (increasing from about 150 sqm net sales area in 2029 to about 1,900 sqm net sales area by 2044). Meanwhile, the Other non-central stores in East Herts (modelled as a group) are assessed to have negative capacity throughout the forecasting period.

7.18 Considering the District-wide picture is one of over-supply in the earlier part of the forecasting period, and noting that longer term capacity forecasts should be treated with a degree of caution, as they are based on various assumptions and forecasts than can and will change, we assess there is no quantitative need to plan or allocate sites for new comparison goods floorspace. This further aligns with market trends and a reduction in retailer demand. There will be scope, however, for existing vacant shop floorspace in the existing centres to accommodate any retailer demand that arises. This is most likely within the busier, more 'prime' areas, with the secondary areas supporting a high proportion of services and/or seeing a contraction of retail space (i.e. its release for alternative uses such as residential).

8. Commercial Leisure Needs Assessment

8.1 Leisure uses and activities are essential for successful town centres. They can play a major role in attracting visitors, extending dwell times, and supporting the evening economy.

8.2 In this section, we identify the current supply of key leisure facilities in East Herts and assess whether there are any deficiencies or 'gaps' in the existing commercial leisure offer – with a particular focus on eating and drinking out (i.e. food and beverage uses); cinema; ten-pin bowling; bingo; and gymnasiums and other indoor-based health and fitness activities. We also recognise the important role of non-commercial leisure attractions such as theatres, museums and other cultural facilities and events.

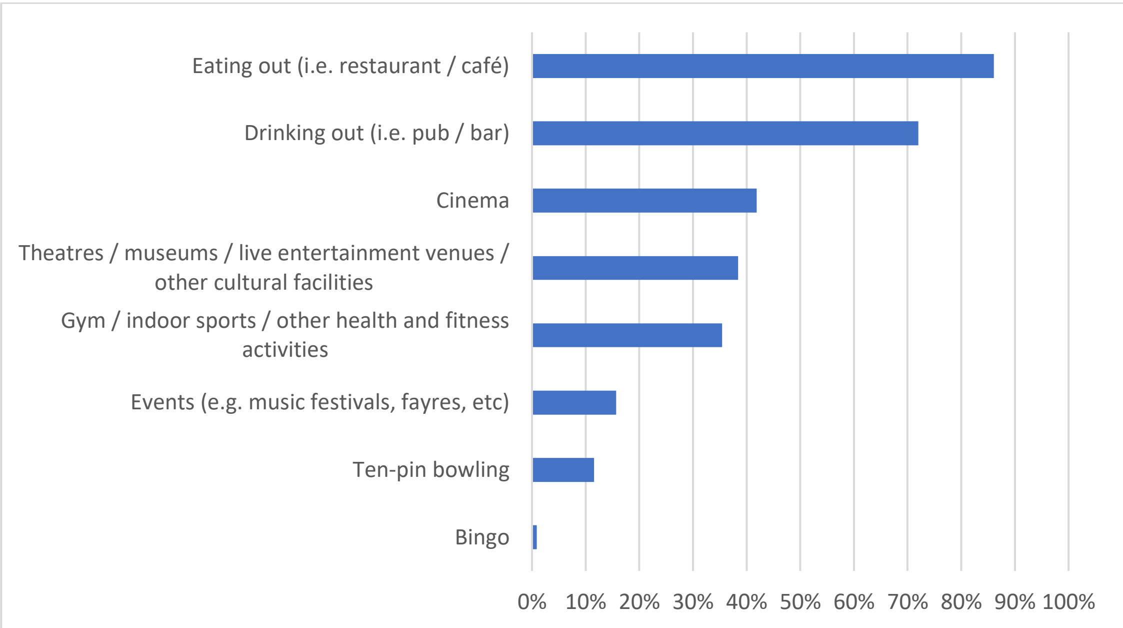
8.3 It should be noted that forecasting the need for commercial leisure provision is more problematic than for retailing. This is due to the unpredictable and highly elastic nature of leisure trips (and associated spending) in addition to a lack of reliable performance data. Consequently, there is no robust method for assessing commercial leisure needs in quantitative terms. Our review is therefore based on high-level qualitative analysis informed by the following:

- the leisure market context and trends identified in section 3;
- our town centre reviews in section 5;
- the results of the 2026 household survey (Appendix B); and
- desktop research.

Participation Levels

8.4 Figure 8.1 below shows the level of participation in different types of leisure-based activities by respondents to the household survey[14] which, as described earlier in this report, is based on a catchment area comprising 6 zones (as shown on the map included at Appendix A).

Figure 8.1 – Participation in leisure-based activities across the catchment area



Source: Question 25 of household telephone survey (Appendix B).

[14] The chart identifies the percentage of respondents who participate more than once a year in the relevant activity.

8.5 The most popular activity relates to eating out (i.e. restaurant/café) with around 86% of respondents visiting these types of facilities. Drinking out (i.e. pub/bar) is also popular and has the second highest level of participation (around 72% of respondents). The *Eating and Drinking Out* section below identifies respondents' frequency of visits to such facilities and the most popular destinations in (and outside) East Herts.

8.6 Almost 42% of the respondents visit the cinema and the *Cinema* section below examines this type of activity in more detail, including the frequency of visits and existing provision in East Herts and the surrounding area.

8.7 The next most common activities are trips to the theatre, museums, live entertainment venues and other cultural facilities (38.4%) and gyms and other indoor sports activities (35.4%). The former are not commercial leisure facilities but are clearly important and complementary attractions, with Bishop's Stortford and Hertford Town Centres in particular securing a catchment area market share of such visits.

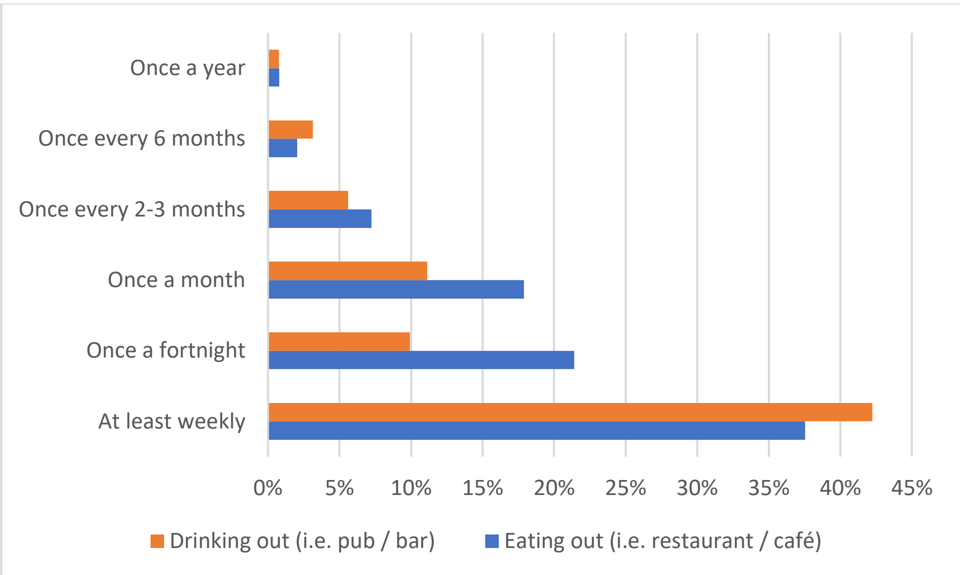
8.8 Participation in other types of leisure-based activities, namely ten-pin bowling and bingo, is much lower (around 11% and 1% respectively) as shown in Figure 8.1 above.

Eating and Drinking Out

8.9 The F&B sector includes cafes, restaurants, pubs and bars. A good quality and choice of F&B uses can help to support a centre's retail function and complement the wider offer by generating footfall, improving the consumer 'experience' and extending dwell times into the evening.

8.10 As identified in Figure 8.1 above, eating out and (to a lesser degree) drinking out comprise the most popular leisure-based activities in terms of participation levels across the catchment area; and Figure 8.2 below sets out the frequency of visits.

Figure 8.2 – Frequency of visits to restaurants/cafes and pubs/bars



Source: Question 25 of household telephone survey (Appendix B).

8.11 Respondents' propensity to visit pubs/bars (42%) and restaurants/cafes (38%) at least weekly is strong. On the face of it, such trips and associated spending should support the potential to enhance the choice of F&B uses in the District's main centres. However, while gourmet fast-food and quick-serve brands continue expanding, the level of growth will be subject to market conditions and demand amid inflationary pressures and shifting consumer habits. Competing offers in the surrounding towns and villages, including Harlow, as well as Central London / West End, as per the household survey findings, will also have implications for the potential level of growth in East Herts.

8.12 Figure 8.3 below provides a summary of F&B provision in the District's main centres.

Figure 8.3 – Overview of existing F&B provision in East Herts

Centre	Description
Bishop's Stortford Town Centre	The centre's F&B offer is established and a reason to visit, with a strong choice of bars and catering options including 'destination' Mediterranean/Turkish restaurants (such as Skew and Pircio) as well as the EAT17 food hall.
Hertford Town Centre	The centre offers a good line-up of predominantly independent F&B operators including restaurants, cafes and bars which, together with the centre's wider appeal, ensures Hertford is a popular destination for F&B trips.
Buntingford Town Centre	The centre has a limited F&B offer, which includes public houses and a small number of restaurants/cafes.
Sawbridgeworth Town Centre	The centre contains several public houses and some local independent catering options.
Ware Town Centre	The centre has a range of restaurants, cafes and bars. Aside from the Prezzo (Italian) restaurant, the offer predominantly comprises independent operators.

8.13 Respondents to the household survey were asked where they visit most often for the purpose of eating and drinking out. The market shares secured by the District's town centres for restaurants/cafés (Figure 8.4) and pubs/bars (Figure 8.5) respectively are summarised below.

8.14 Figure 8.4 indicates that Bishop's Stortford Town Centre is the catchment area's principal destination for eating out, with an overall market share of 30.6% according to the survey research, followed by Hertford Town Centre (17.7% catchment area market share). The main competing destinations are Harlow Town Centre (securing a catchment area market share of approximately 8% comparable to Ware Town Centre), Stevenage Town Centre and Central London / West End.

Figure 8.4 – Restaurant/café catchment area market share

Destination	Catchment area % market share
Bishop's Stortford Town Centre	30.6%
Hertford Town Centre	17.7%
Ware Town Centre	8.4%
Sawbridgeworth Town Centre	3.8%
Buntingford Town Centre	3.3%
Main competing destinations (outside East Herts):	
Harlow Town Centre	8.2%
Stevenage Town Centre	7.4%
Central London / West End	6.2%

Source: Question 27 of household telephone survey (Appendix B).

8.15 Figure 8.5 below reveals a similar picture for drinking out, with Bishop's Stortford Town Centre securing a total catchment area market share of 28.7% and it is therefore the principal destination for this type of activity. Hertford Town Centre is the second most popular destination and performs slightly better for drinking out (19.5%) compared with eating out (17.7%). Ware Town Centre also performs better for drinking out (12.1%). The main competing destinations are Central London / West End and Harlow Town Centre.

Figure 8.5 – Pub/bar catchment area market share

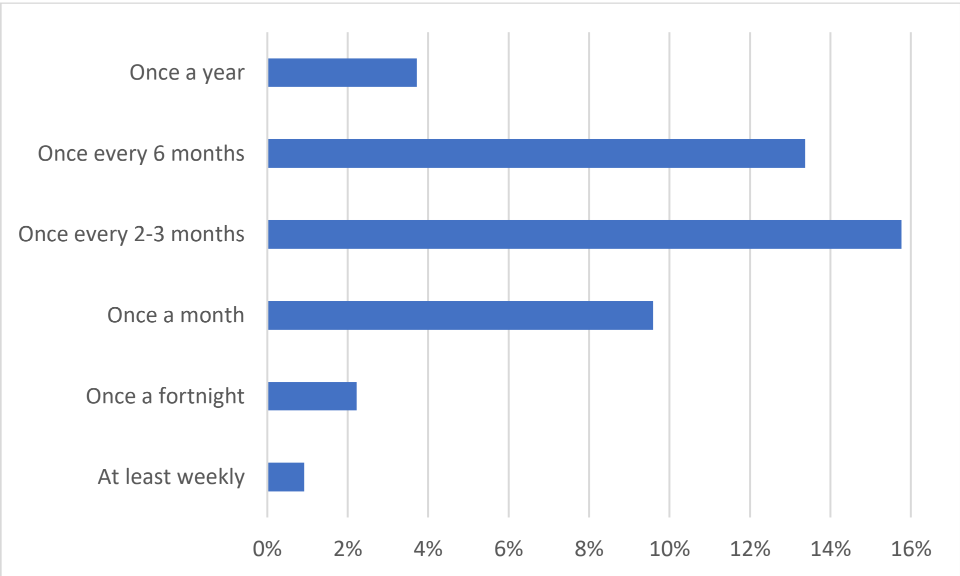
Destination	Catchment area % market share
Bishop's Stortford Town Centre	28.7%
Hertford Town Centre	19.5%
Ware Town Centre	12.1%
Buntingford Town Centre	5.0%
Sawbridgeworth Town Centre	4.6%
Main competing destinations (outside East Herts):	
Central London / West End	6.0%
Harlow Town Centre	5.2%

Source: Question 26 of household telephone survey (Appendix B).

Cinema

8.16 Figure 8.6 below reveals how often respondents to the household survey visit the cinema. Almost 16% of respondents visit once every 2-3 months, followed by about 13% once every 6 months. Although not represented in the chart below, it is also to be noted that more than half (53%) said they visit the cinema less than once a year or never. These findings suggest relatively modest levels of participation across the catchment.

Figure 8.6 – Frequency of visits to the cinema



Source: Question 25 of household telephone survey (Appendix B).

8.17 East Herts District has two main cinemas: Roxy Movies in Bishop's Stortford Town Centre and BEAM in Hertford Town Centre. The 3-screen BEAM cinema is the fourth most popular cinema destination amongst catchment area respondents, retaining a 9.5% market share, as shown in Figure 8.7 below. Roxy Movies, which has 4 cinema screens, secures a 4.1% catchment area market share.

8.18 Competing cinemas in Harlow and Stevenage are clearly attracting a significant proportion of cinemagoers from the catchment area. Each of these main competing destinations are multi-plex Cineworld cinemas (of the type and scale not currently found in East Herts) and are situated adjacent to substantial retail and F&B offers which enhance their appeal and convenience to consumers.

Figure 8.7 – Cinema catchment area market share

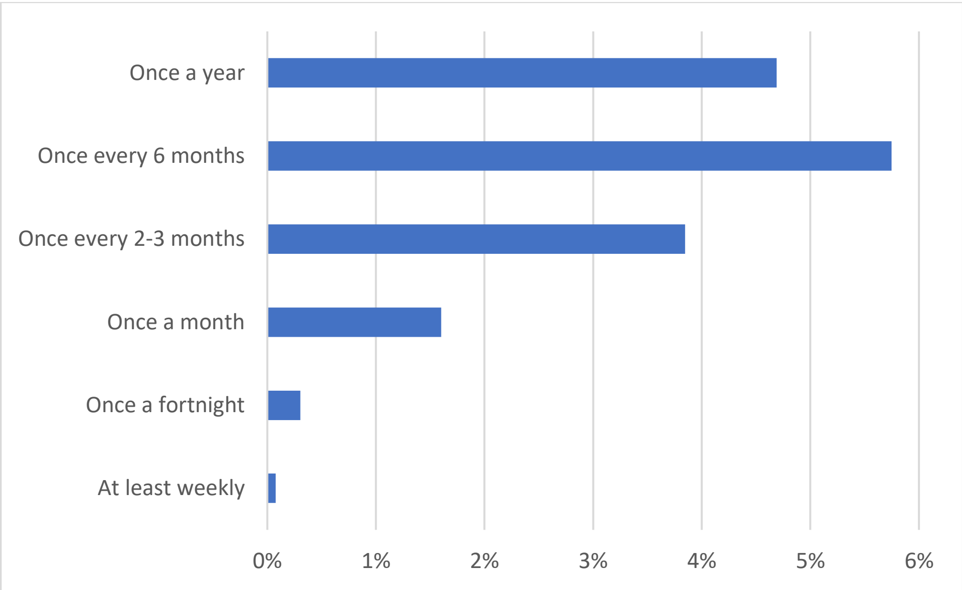
Destination	Catchment area % market share
BEAM, The Wash, Hertford Town Centre	9.5%
Roxy Movies, Anchor Street, Bishop's Stortford Town Centre	4.1%
Main competing destinations (outside East Herts): Cineworld, Stevenage Leisure Park, Stevenage Cineworld, Harvey Shopping Centre, Harlow Cineworld, The Queensgate Centre, Harlow	 26.7% 24.4% 21.5%

Source: Question 29 of household telephone survey (Appendix B).

Ten-pin bowling

8.19 Ten-pin bowling is a long-established commercial leisure activity, particularly for families and social groups. Like cinemas and other leisure operators, however, such facilities have been affected by shifting consumer habits and tend to attract occasional (or less frequent) visits as shown in Figure 8.8 below.

Figure 8.8 – Frequency of visits to ten-pin bowling



Source: Question 25 of household telephone survey (Appendix B).

8.20 Ace of Lanes in Bishop's Stortford Town Centre is the District's main ten-pin bowling facility. According to the household survey research, it secures more than a 20% catchment area market share. The main competing destination outside East Herts is Hollywood Bowl at Stevenage Leisure Park (59% catchment area market share).

Bingo

8.21 The bingo sector has been faced with falling admissions and therefore closures in the past 10-15 years, driven by the indoor smoking ban and a shift to online-based gambling and gaming.

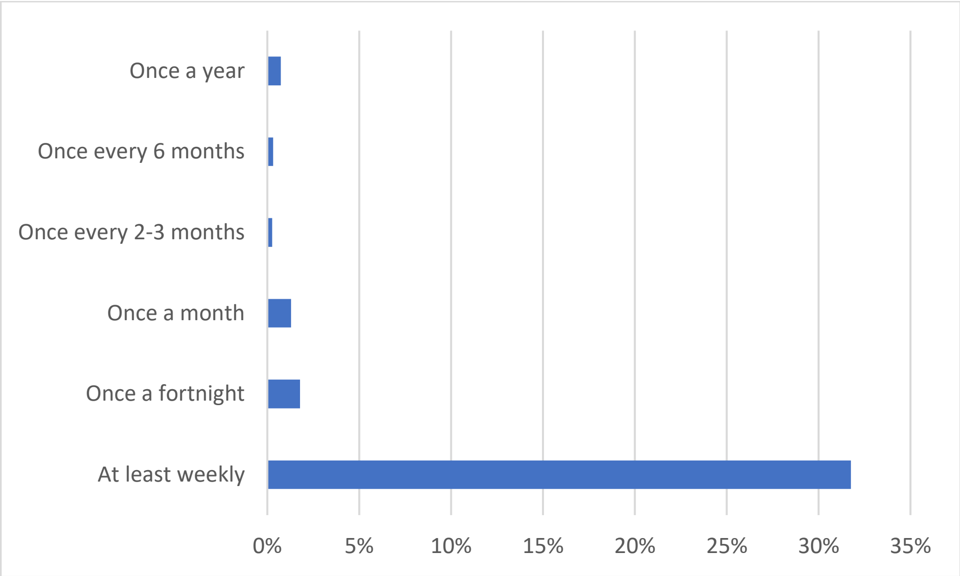
8.22 Participation rates for bingo are very low: about 87% of respondents to the household survey do not visit the bingo. Of those who do, about 9% visit the bingo less than once a year. The nearest and most popular venue is Mecca Bingo in Harlow Town Centre (which secures a 24% catchment area market share).

Gyms, indoor sports and other health and fitness activities

8.23 Gyms and other indoor sports facilities can make an important contribution towards town centre footfall and activity. The budget operators offering flexible and discounted subscriptions have experienced the most significant growth in recent years, while female-only gyms have grown in popularity, yet all operators are faced with increasing competition from 'at home' digital fitness platforms and equipment.

8.24 Whilst almost 60% of respondents to the household survey do not partake in these types of activities, Figure 8.9 below shows that around 32% visit at least weekly.

Figure 8.9 – Frequency of visits to gyms and other indoor sports/fitness



Source: Question 25 of household telephone survey (Appendix B).

8.25 Figure 8.10 below identifies some of the main public and private gyms, other indoor sports and health and fitness facilities in the District, as indicated by the household survey research, together with the catchment area market shares.

Figure 8.10 – Gyms and other indoor sports/fitness catchment area market share

Destination	Catchment area % market share
Nuffield Health Fitness & Wellbeing Gym, Madford Retail Park, Hertford	14.5%
Hartham Leisure Centre, Hartham Common, Hertford	11.8%
Grange Paddocks Leisure Centre, Rye Street, Bishop's Stortford	10.4%
Nuffield Health Fitness & Wellbeing Gym, Anchor Street, Bishop's Stortford	9.1%
Wodson Park Sports & Leisure Centre, Wadesmill Road, Ware	5.9%

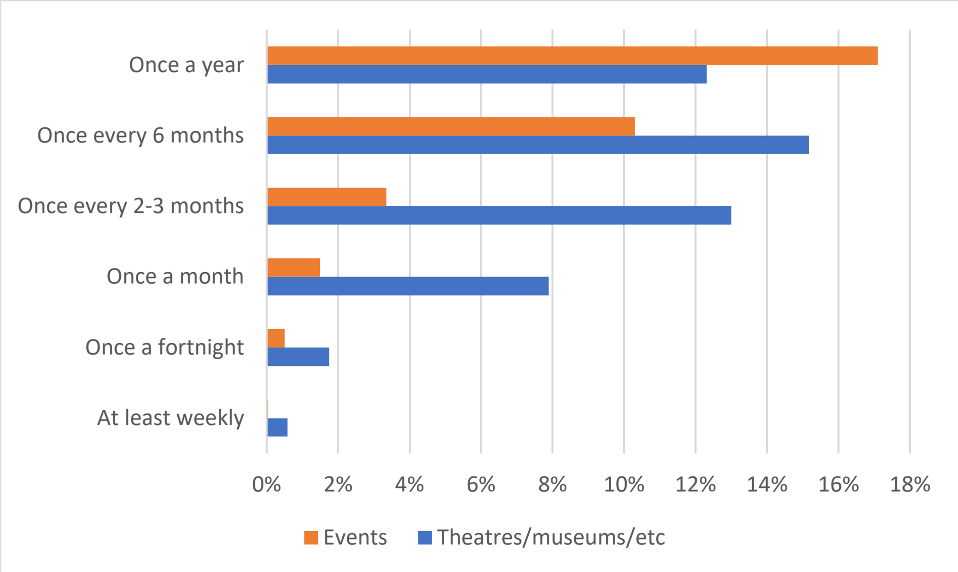
Source: Question 28 of household telephone survey (Appendix B).

Non-commercial leisure facilities

8.26 Non-commercial leisure facilities (i.e. recreational, cultural or entertainment facilities that are primarily driven by artistic expression and community enrichment rather than generating profit) have an important role supporting town centre vitality and viability. To that end, Figure 8.11 below reveals how often catchment area respondents visit the following types of attractions:

- Theatres / museums / live entertainment venues / other cultural facilities
- Events (e.g. music festivals, fayres, etc)

Figure 8.11 – Frequency of visits to non-commercial leisure facilities



Source: Question 25 of household telephone survey (Appendix B).

8.27 Figure 8.12 below identifies the non-commercial leisure facilities or attractions visited “most often” by respondents to the household survey, together with the percentage of responses.

Figure 8.12 – Main non-commercial leisure facilities

Theatres / museums / live entertainment venues / other cultural facilities	Total % responses
BEAM, The Wash, Hertford Town Centre	10.2%
Southmill Arts Centre, South Road, Bishop's Stortford	3.9%
The Little Theatre, Balfour Street, Hertford	1.3%
Hertford Town Centre	1.0%
Main 'competing' locations: Central London / West End Cambridge City Centre Gordon Craig Theatre, Stevenage Harlow Playhouse, Harlow	 67.8% 3.7% 1.3% 1.3%
Events (e.g. music festivals, fayres, etc)	**Total % responses**
Bishop's Stortford Town Centre	7.4%
Hertford Town Centre	7.4%
Town Park Sworder's Field, Bishop's Stortford	2.1%
Main 'competing' locations: Central London / West End Harlow Town Centre	 46.8% 2.9%

8.28 The most popular cultural facilities and events in East Herts are focused in Bishop's Stortford and Hertford. Key attractions include the Council-funded BEAM multi-arts venue in Hertford Town Centre and Southmill Arts Centre in Bishop's Stortford, which add variety and drive 'purpose of visits' to the towns.

Potential Improvements / Needs

8.29 The preceding analysis has considered the District's existing commercial and non-commercial leisure offer. We have used household survey research to establish levels of participation, frequency of visits, and provide a high-level indication of market share where possible.

8.30 Taking this a step further, the household survey asked respondents what additional facilities or other improvements would encourage them to do leisure activities more often in the area. Figure 8.13 below identifies the 'top 15' most cited improvements and needs.

8.31 Although almost a third of catchment area respondents answered "none" while a further 13.3% said either "don't know" or "don't do" when asked this question, the survey findings suggest there is scope for improvement and new facilities subject to market demand.

Figure 8.13 – Suggested improvements and needs to encourage more leisure activities

Suggestion	Total % responses
Better shopping facilities	18.3%
More or better restaurants/cafes	18.2%
Cinema – art house	10.1%
Cinema – multi-screen	9.0%
More or better leisure facilities / activities for families	7.4%
Swimming pool – indoor	7.3%
More or better leisure facilities / activities for teenagers	5.5%
More or better pubs/bars	4.1%
More or better leisure facilities / activities for the elderly	4.0%
More or better leisure facilities / activities for young children	3.8%
More or better cultural facilities (e.g. museums / art galleries)	3.2%
Swimming pool – outdoor	3.2%
More or better health clubs / gyms (indoor)	3.0%
More outdoor entertainment / events (including festivals)	2.4%
Improved car parking facilities	2.1%
(None)	30.3%
(Don't know / don't do)	13.3%

Source: Question 34 of household telephone survey (Appendix B).

8.32 It is interesting that one of the most common responses (about 18%) indicates that better shopping facilities would encourage respondents to do more leisure activities in the area. This suggests consumers are looking to combine their leisure activities with a day-out or a linked trip to shopping facilities; and aligns with our market context review in section 3 about the need for town centres to become more multi-purpose in their offer, use and experience.

8.33 The other most common response (also about 18%) is the need for more or better restaurants/cafes. This is followed by responses indicating that new cinema facilities would encourage respondents to do more leisure activities in the area (10.1% suggested an "art house" cinema and 9% suggested a "multi-screen" cinema).

8.34 Other notable responses included more or better leisure facilities/activities for families (7.4%) and for teenagers (5.5%), while 7.3% suggested an indoor swimming pool.

Demographic-Based Potential Improvements / Needs

- 'Better shopping facilities' is a main suggestion for respondents aged 18-34 (31%) and 35-54 (29%), whereas only about 1% of those aged over 55 years cited this as a potential improvement.
- Responses suggesting 'more or better restaurants/cafes' and 'more or better pubs/bars' follow a similar pattern, with much higher response levels amongst the 18-54 age band.
- The main 'need' identified by those aged over 55 years is a multi-screen cinema (5%) and this is also a popular suggestion by the 18-34 age group (14%) and the 35-54 age group (10%).
- Relative to the younger age groups, a higher proportion of respondents aged over 55 years (49%) suggest 'no' additional facilities or improvements would encourage them to do leisure activities more often in the area.

Summary and Accommodating Commercial Leisure Needs

8.35 The commercial leisure sector is dynamic and changes rapidly. As highlighted earlier, there is no robust method for assessing commercial leisure needs in quantitative terms owing to the unpredictable nature of leisure trips and a lack of reliable performance data.

8.36 This section has therefore reviewed East Herts District's commercial leisure needs in qualitative terms, supported by the results of the household survey and other sources of data. Having assessed the current supply of key leisure facilities in the District, including consideration for participation rates and potential improvements, in addition to competing provision outside East Herts, we set out below any deficiencies in the commercial leisure offer and advise whether any new provision should be planned for.

8.37 The household survey research has confirmed that eating out and (to a lesser degree) drinking out comprise the most popular leisure-based activities in the catchment area, with around 86% visiting restaurants/cafes more than once a year and around 72% visiting pubs/bars more than once a year. Such facilities help to extend dwell time and hours of activity into the evening, while the catchment area market share analysis indicates there is demand for more or better F&B provision, particularly amongst the younger age groups.

8.38 Bishop's Stortford Town Centre is the main destination for eating and drinking out, reflecting its relative size and strong catering offer, together with its wider shopping, leisure and cultural attractions. The Town Centre includes some 'destination' restaurants and a small but popular food hall-style offering at EAT17. Hertford Town Centre is the catchment area's next most popular destination for eating and drinking out, thanks to its good line-up of established F&B options and the recent additions at Lea Wharf. Ware Town Centre has a decent range of pubs and catering options, while the smaller town centres (Buntingford and Sawbridgeworth) have a more limited offering.

8.39 The scale of any growth in F&B provision will largely be dependent on market conditions and demand. Competing offers in the surrounding towns and villages will also serve to limit the potential for growth in East Herts.

8.40 The main cinema offer in the District is currently limited to BEAM in Hertford Town Centre and Roxy Movies in Bishop's Stortford Town Centre. The former is the most popular East Herts-based cinema destination in the catchment area, although competing cinemas in Harlow and Stevenage attract the highest proportion of cinemagoers from the catchment area (a combined market share of about 73%).

8.41 The household survey research suggests new cinema facilities (including art-house and multi-screen formats) would encourage respondents to do more leisure activities in the area. However, the cinema sector is under a degree of stress following the pandemic and the market is seeing very few openings. That said, the smaller independent cinemas like BEAM and Roxy Movies have shown that new facilities can be viable (recognising BEAM was Council-funded) in the right location and as part of the right mix of uses. Any additional cinema provision over the plan period, including permanent and 'pop-up' indoor or outdoor cinemas, should be supported in principle and considered as potentially adding to the offers and reasons to visit the District's town centres.

8.42 In terms of future needs for ten-pin bowling, we take the view that the existing main destination in Bishop's Stortford Town Centre (Ace of Lanes) is unlikely to entirely satisfy the demand for this type of activity considering the relatively high market shares attracted to Stevenage. That said, low participation rates coupled with competing provision in Stevenage, as well as Harlow, is likely to fetter any scope for additional provision.

8.43 Consumer demand for bingo facilities has fallen considerably in recent years and the survey research has indicated low participation in this type of leisure-based activity. We assess there is no need to plan for such facilities.

8.44 Existing provision and usage of gyms and other indoor sports facilities is largely dominated by facilities outside the town centres. The lack of 'in-centre' provision would suggest there is scope for additional facilities, including in the town centres of Bishop's Stortford, Hertford and Ware, where an increasing number of leisure uses (e.g. gyms, fitness studios) have come forward out of town. The challenge here is the provision of suitable premises for these larger format uses more centrally, that can meet operational requirements or preferences. Nevertheless, should proposals come forward for a new such facilities in or on the edge of the town centres, they have the potential to complement and enhance the range of uses and experiences available.

8.45 Non-commercial leisure uses and activities are an important element of the all-round leisure offer and our assessment has identified that trips to the theatre, museums, live entertainment venues and other cultural facilities (and events to a lesser degree) are common activities amongst catchment area residents. These types of facilities and experiences, especially those focused in or close to the town centres are important complementary attractions and help to support their retail and service functions.

8.46 Overall, as our analysis has identified, there is scope for improvement in the District's commercial leisure offer although the potential for growth is limited by market factors, supply-side constraints and accessible competing destinations. There is understandably some 'leakage' and a degree of reliance on larger surrounding destinations such as Stevenage and Harlow for leisure-based activities (and cultural facilities, in particular Central London / West End). Notwithstanding, we consider there is no need for EHDC to allocate specific sites for new leisure provision. A more flexible approach is recommended. Indeed, in the longer term, as the catchment area population increases and new development proposals emerge, there may be additional demand for commercial leisure facilities, in which case any such provision should be directed to the District's main centres in accordance with the sequential approach to strengthen their diversity of uses and overall vitality. Larger format uses should be encouraged in the larger town centres in particular, commensurate with the retail hierarchy and to improve their roles as a main 'evening economy' destinations. These are more likely to come forward as part of repurposing or mixed-use schemes (as opposed to new standalone formats) for commercial viability reasons.

8.47 The town centre policies of the new Local Plan should be sufficiently flexible to ensure that proposals of this nature are supported in appropriate locations and capable of contributing towards town centre vitality and viability.

9. Retail Strategy and Policy Recommendations

9.1 This section sets out the retail strategy for East Herts District based on the findings of this Study. Where appropriate, our advice includes a critical review of the relevant policies set out in the currently adopted District Plan. We consider whether these policies are fit-for-purpose, or whether any policy revisions and/or additional provisions are necessary to ensure the new Local Plan reflects the updated evidence base and is consistent with the NPPF.

District-Wide Retail Needs and Strategy

9.2 Our capacity (or needs) forecasts represent the 'baseline' scenario for new retail floorspace in East Herts, in which we assume that the 2026 survey-derived pattern of market shares of convenience and comparison goods expenditure, in each of the shopping destinations modelled, remains unchanged throughout the forecasting period.

9.3 Table 9.1 below shows our individual capacity forecasts for convenience goods floorspace, together with our overall (i.e. combined) forecasts for the District. The forecasts indicate there will be a limited, yet decreasing, theoretical over-supply of convenience goods floorspace from 2029 onwards. This over-supply is largely driven by the survey-indicated (under) trading performance of existing convenience retail provision in Bishop's Stortford Town Centre.

9.4 Apart from Ware Town Centre, it is assessed that all the other centres in East Herts are faced with modest levels of over-supply. This is offset by the positive capacity identified for the non-central stores in East Herts (about 1,900 sqm net sales area by 2029). Yet this does not justify new 'non-central' foodstore development or extensions should proposals come forward; rather, the sequential approach should be applied. It is also to be noted that, where there is limited or no expenditure capacity to support additional convenience goods floorspace, as is the case for East Herts District as a whole, any new foodstore development or extensions will have the potential to have greater adverse impacts on existing centres/stores. This is because there is a direct correlation between capacity and impact.

9.5 Notwithstanding, the overall picture across the District is one of a limited over-supply of convenience goods floorspace; and we assess **there is no quantitative need to plan or allocate sites for new convenience goods floorspace**.

9.6 With evidence of under-trading in most of the main centres, particularly Bishop's Stortford Town Centre, the strategy should be focused on encouraging activity and linked-trips in those centres to support their existing convenience retail offers, or store refurbishments, as opposed to planning for new foodstores.

Table 9.1 – Summary of capacity forecasts: convenience goods (sqm net sales area)

	2029	2034	2039	2044	Table number (Appendix C)
Bishop's Stortford Town Centre	-1,350	-1,350	-1,300	-1,300	13
Hertford Town Centre	-300	-300	-300	-300	21
Buntingford Town Centre	-300	-300	-300	-300	29
Sawbridgeworth Town Centre	-50	-50	-50	-50	37
Ware Town Centre	600	600	600	600	45
Other Centres in East Herts (as a group)	-900	-850	-800	-750	53
Madford Retail Park, Hertford	-	-	-	-	-
Other non-central stores in East Herts (as a group)	1,900	1,900	1,900	1,950	71
Combined forecasts for East Herts	**-400**	**-350**	**-250**	**-150**	n/a

Source:
Tables 1-71, Appendix C (as indicated to the right).
Notes:
a) The forecasts are 'baseline' forecasts after allowing for the committed developments.
b) The forecasts are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.
c) Forecasts rounded to the nearest 50 sqm net.

9.7 The position in respect of comparison goods floorspace, as set out in Table 9.2 below, is that there will be a limited theoretical over-supply of comparison goods floorspace in East Herts (all shopping destinations modelled as a whole) in 2029. However, in the longer term, due to stable/positive spending growth as currently forecasted by Experian, capacity for additional comparison goods floorspace is identified and will rise to about 1,800 sqm net sales area by the end of the plan period – principally due to assessed expenditure-based capacity in Bishop's Stortford Town Centre.

9.8 Considering the District-wide picture is one of over-supply in the earlier part of the forecasting period, and noting that longer term capacity forecasts should be treated with a degree of caution, as they are based on various assumptions and forecasts than can and will change, we assess **there is no quantitative need to plan or allocate sites for new comparison goods floorspace**. This further aligns with market trends and a reduction in retailer demand. There will be scope, however, for existing vacant shop floorspace in the existing centres to accommodate any retailer demand that arises. This is most likely within the busier, more prime areas, with the secondary areas supporting a high proportion of services and/or seeing a contraction of retail space (i.e. its release for alternative uses such as residential).

Table 9.2 – Summary of capacity forecasts: comparison goods (sqm net sales area)

	2029	2034	2039	2044	Table number (Appendix C)
Bishop's Stortford Town Centre	150	800	1,450	1,900	13
Hertford Town Centre	0	100	200	300	21
Buntingford Town Centre	0	50	50	100	29
Sawbridgeworth Town Centre	0	0	50	50	37
Ware Town Centre	0	100	200	250	45
Other Centres in East Herts (as a group)	0	50	50	50	53
Madford Retail Park, Hertford	450	500	600	650	62
Other non-central stores in East Herts (as a group)	-1,800	-1,700	-1,600	-1,500	71
Combined forecasts for East Herts	**-1,200**	**-100**	**1,000**	**1,800**	n/a

Source:
Tables 1-71, Appendix C (as indicated to the right).
Notes:
a) The forecasts are 'baseline' forecasts after allowing for the committed developments.
b) The forecasts are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.
c) Forecasts rounded to the nearest 50 sqm net.

9.9 Our retail capacity forecasts set out above serve as a guide for future planning policies and decisions on planning applications. The forecasts should be reviewed regularly in the light of actual population and (in particular) expenditure growth, the outlook for which is subject to change given macro-economic conditions and trends.

9.10 In addition, the PPG states that assessments '*...may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed'* (paragraph 004). Therefore, greater weight should be placed on the capacity forecasts over the next 5-10 year period.

Madford Retail Park, Hertford

9.11 Hertford's Madford Retail Park has been promoted through the call-for-sites process and the Council are therefore keen to understand how the Retail Park is used and performs as a shopping destination. The retail park currently includes Matalan, Pets at Home and Wickes, in addition to Majestic Wine and Costa.

9.12 For the purposes of the market share analysis and capacity assessment set out in this Study, we have modelled Madford Retail Park separately as a shopping destination. The household survey research indicates that it secures a low market share of total available catchment area expenditure on comparison goods (2.6%) although, reflecting the store line-up, the retail park secures a relatively high market share of catchment area expenditure on hardware, DIY and garden products (18%); as well as a 5% market share on household textiles and a 2% market share on clothing and footwear. The market share data suggests Madford Retail Park is more widely used by those aged 54 years and below.

9.13 In the event Madford Retail Park is the subject of residential-led redevelopment in future years, requiring the closure of its existing stores, we consider the most likely scenario is that a high proportion of its current market shares will be redistributed to retail parks/warehouses outside East Herts (e.g. Harlow and Stevenage) which have comparable competitive facilities. Some sub-categories of comparison goods expenditure may be retained within the District, for example the Wickes store in Bishop's Stortford (i.e. hardware, DIY and garden products) or the District's foodstores and garden centres outside Hertford and Ware. However, given the nature of their retail offers, we consider there is limited prospect of the nearest Town Centres of Hertford and Ware attracting the expenditure 'lost' arising from the potential closure of Madford Retail Park. Given the above, and emphasising the retail park's low overall market share, we consider there is little merit in modelling an alternative scenario whereby we explore the effect of adjusted market shares for Madford Retail Park following its potential redevelopment in future years, and the likely implications for shopping patterns and retail provision in the surrounding town centres. Competing like-for-like destinations in Harlow and Stevenage are well placed to capture a high proportion of any expenditure market shares lost from Madford Retail Park – unless an alternative site outside (preferably on the edge of) one of the District's town centres is available, suitable and viable for large format retail. No potential alternative site has been identified at this stage. It should also be recognised that any sites of a substantial scale and otherwise potentially suitable for large format retail, that may come forward in future years, will be subject to competing land uses i.e. residential.

9.14 We would also make the following observations:

a) There is little or no evidence of linked trips between Madford Retail Park and Hertford Town Centre (the closest centre). The potential closure/loss of the retail park to alternative use(s) in future years is therefore unlikely to have adverse consequences for the Town Centre. Indeed, residential-led redevelopment at Madford Retail Park is likely to have the opposite effect on the basis the new population should bring additional footfall and spending to support the town centre's shops and services.

b) The surface level car park serving Madford Retail Park is important to both customers and occupiers, given the 'bulky' comparison goods sold from the retail park (e.g. hardware, DIY and garden products). Redeveloping the car park (or part of it) whilst retaining the existing stores is therefore unlikely to be a viable option.

9.15 In terms of **a recommended policy approach for Madford Retail Park**, any future redevelopment proposals should be required to justify (i) the loss of existing retail uses and (ii) the scale and mix of uses proposed as part of any redevelopment. In addition:

- The sequential test shall apply in the event main town centre uses are proposed; and
- The impact test shall apply in the event retail and/or leisure development is proposed which exceeds the local floorspace impact thresholds set out in policy.

Commercial Leisure Needs and Strategy

9.16 Bishop's Stortford and Hertford Town Centres are the District's principal destination for F&B and larger format commercial leisure facilities (i.e. cinemas and ten-pin bowling). The smaller town centres have a more limited offering, focused largely on pubs/bars, although Ware Town Centre in particular has a range of restaurants/cafes.

9.17 Overall, our analysis identifies there is scope for improvement in the District's commercial leisure offer although the potential for growth is limited by market factors, supply-side constraints and accessible competing destinations. There is understandably some 'leakage' and a degree of reliance on larger surrounding destinations such as Stevenage and Harlow for leisure-based activities (and cultural facilities, in particular Central London / West End). Notwithstanding, we consider **there is no need for EHDC to allocate specific sites for new leisure provision. A more flexible approach is recommended.**

9.18 Indeed, in the longer term, as the catchment area population increases and new development proposals emerge, there may be additional demand for commercial leisure facilities, in which case any such provision should be directed to the District's main centres in accordance with the sequential approach to strengthen their diversity of uses and overall vitality. **Larger format uses should be encouraged in the larger town centres in particular**, commensurate with the retail hierarchy and to improve their roles as a main 'evening economy' destinations. These are more likely to come forward as part of repurposing or mixed-use schemes (as opposed to new standalone formats) for commercial viability reasons.

9.19 The town centre policies of the new Local Plan should be sufficiently flexible to ensure that proposals of this nature are supported in appropriate locations and capable of contributing towards town centre vitality and viability.

9.20 To that end, we would recommend **a policy approach which requires town centre development proposals to include active (non-residential) ground floor frontages. The non-residential spaces to be provided at ground floor level should be flexible and suitable for a wide range of uses** (e.g. gyms, food and beverage, workspaces, health clinics) to ensure they are future-proof and capable of contributing positively to the vitality and viability of the centre.

Network and Hierarchy of Centres

9.21 Paragraph 16.3.2 of the District Plan defines the hierarchy of town centres as follows:

- Principal Town Centre: Bishop's Stortford
- Secondary Town Centre: Hertford
- Minor Town Centres: Buntingford, Sawbridgeworth and Ware

9.22 Table 16.1 of the District Plan then sets out, *A full list of District and Neighbourhood Centres, and Local Parades* (paragraph 16.8.6) as copied below for ease of reference.

Hierarchy	**Location**
District Centre	• The Thorley Centre, Bishop's Stortford
Neighbourhood Centre	• Bishop's Park, Bishop's Stortford • Bishop's Stortford North • Birchall Garden Suburb, East of Welwyn Garden City • Gresley Park, East of Stevenage • North and East of Ware • The Gilston Area • Whittington Way at Bishop's Stortford South
Local Parade: Bishop's Stortford	• Hockerill • Havers Parade • Snowley Parade
Local Parade: Hertford	• Fleming Crescent, Sele Farm • The Avenue
Local Parade: Ware	• The Green, Kingshill • Cromwell Road • King George Road
Local Parade: Villages	• Puckeridge • Standon • Stanstead Abbotts and St Margarets • Watton-at-Stone

9.23 As an approach, the hierarchy of town centres defined under paragraph 16.3.2 of the District Plan reflects the NPPF (paragraph 90a) requirement that <u>*planning policies should*</u> define a network and hierarchy of town centres (our emphasis). Town centres are defined as:

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

9.24 However, not all the locations identified in Table 16.1 of the District Plan are likely to meet the definition of 'town centres' in the NPPF; and some have not been delivered (as considered previously in section 5).

9.25 Based on the findings of this Study, we consider:

- It remains appropriate to define Bishop's Stortford as the **Principal Town Centre** at the apex of the hierarchy, reflecting and promoting its role as the largest centre for shopping, services, leisure, other commercial, and cultural activities in the District;
- The Council could re-consider Hertford's classification as a Secondary Town Centre, i.e. consider defining as a **Major Town Centre**, on the basis the 'secondary' term does not reflect and promote the town centre's important role and function in the hierarchy;
- The Council could also consider re-classifying Buntingford, Sawbridgeworth and Ware as **Town Centres** (as opposed to Minor Town Centres) because they cannot be characterised as 'minor' centres, albeit their respective role and function is not at the same level as Hertford Town Centre.
- The Thorley Centre (Bishop's Stortford) and Bishop's Park (Bishop's Stortford), each characterised by large foodstores, should be defined as **District Centres**.
- The Council should consider whether any of the other existing centres identified in Table 16.1 of the District Plan fulfil the role and function of a **Local Centre**; or whether they comprise *"small parades of shops of purely neighbourhood significance"* citing the abovementioned NPPF definition of town centres.

9.26 Our recommended descriptions of each tier of centre within the hierarchy (see Table 9.3 below) can assist understanding the intended role and function of each centre and we would recommend that the new Local Plan includes these descriptions.

Table 9.3 – Recommended definitions of centres in the hierarchy

Tier of centre	**Description**
Principal Town Centre	*At the apex of the District's retail hierarchy, the centre is the principal focus for comparison and convenience goods shopping, services, leisure, and other commercial, community and cultural facilities serving residents in the town of Bishop's Stortford and visitors from a wider catchment area.*
Major Town Centre	*Sitting below the Principal Town Centre in the District's retail hierarchy, the centre provides a range of shops, services, businesses, and community and cultural facilities for residents in the town of Hertford as well as surrounding towns and villages.*
Town Centres	*Although the Town Centres are more varied in their scale and character, they each have an important role providing shops, services, businesses and community facilities to serve the needs of the towns' residents and local catchments.*
District Centres	*Centres with a medium to large foodstore and principally serving the convenience-based retail and service needs of a hinterland which includes a few surrounding suburbs and villages.*
Local Centres	*Centres with a limited range of shops and services catering for the basic needs of their walk-in catchments and passers-by.*

9.27 To ensure the new Local Plan approach to defining a network and hierarchy of centres is consistent with the wording used in the NPPF (paragraph 90a), the Council should consider setting out the full hierarchy – and the descriptions of each tier of centre within the hierarchy – in policy as opposed to the supporting text and a separate table.

Town Centre Boundaries

9.28 The NPPF states that planning policies should *'…define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre'* (paragraph 90b).

9.29 Annex 2 (Glossary) to the NPPF defines a primary shopping area as *'where retail development is concentrated'* and we consider this definition further below in the context of the changes to the Use Classes Order.

9.30 The extent of a centre's primary shopping area (PSA) determines whether a site or building should be considered in-centre (i.e. within the primary shopping area), edge-of-centre or out-of-centre; and is therefore key to the application of the sequential and impact tests set out in the NPPF.

9.31 Edge-of-centre is defined as:

For retail purposes, a location that is well connected to, and up to 300 metres from, the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances.

9.32 Out-of-centre is a location which is not in or on the edge of a centre.

9.33 The NPPF sets out that a 'town centre' (applying to *city centres, town centres, district centres and local centres*) is an area defined on the local authority's policies map, *'including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area'* (Annex 2).

9.34 There is no longer a national policy requirement to define primary and/or secondary shopping frontages. The PPG (paragraph 002) does state that local planning authorities may, where appropriate, wish to define frontages where their use can be justified in supporting the vitality and viability of particular centres. However, we consider that the definition and application of primary and secondary frontages is now outdated – not least since the changes to the Use Classes Order (including Class E) introduced in September 2020 – and too inflexible. In our view, frontage policies can constrain the delivery of a mix of non-retail uses and activities that, as well as helping to support retail, can add significantly to the vitality and viability of town centres in a manner that Class E generally provides for. In the East Herts context, this includes gyms and fitness studios which, as mentioned earlier in this report, are increasing in number outside of the town centres. Whilst there are issues and limitations around attracting larger format uses into town centres, removing unnecessary planning barriers (i.e. restrictive change of use policies) will only assist.

9.35 We therefore recommend that the Council's current approach to controlling retail and non-retail uses as outlined in Policy RTC3 (*'Use Classes [A1-A5] will be supported in principle provided … there remains an adequate provision of A1 and A2 uses which support its role as a Primary Shopping Frontage'*) is reconsidered for the new Local Plan. We suggest the alternative approach set out in Policy RTC4 is more pragmatic and flexible, stating *'proposals for development or changes of use to main town centre uses or those that will support the vitality and viability of the frontage or the town centre as a whole (such as employment generating or activity generating uses) will be supported in principle.'* Indeed, there is increasing emphasis at the plan-making and decision-making stages on qualitative-based assessment factors, focusing on (for example) the nature and character of a proposed use or development, including the level of activity associated with it, and its contribution to the overall health of the centre.

9.36 Meanwhile, given the replacement of the previous Class A uses (including shops) with Class E and a new permitted development right allowing changes of use from Class E uses to residential without the need for planning permission[15], the definition of a PSA (i.e. where retail development is concentrated) is more problematic. PSAs can and will increasingly include a diversity of uses beyond just shops because this is what the UCO and the wider planning reforms provide for – albeit the NPPF has not kept pace with these developments. Thus, the purpose of a PSA is now largely restricted to its critical role in the application of the sequential and impact tests.

9.37 It is in the above context we have reviewed the current town centre boundaries and made recommendations for PSAs in each centre (noting that the current District Plan does not define PSAs for Buntingford and Sawbridgeworth Town Centres). These are shown on the maps at Appendix E.

9.38 Table 9.4 below provides an overview of the changes recommended for each centre.

Table 9.4 – Proposed changes to Town Centre boundaries and PSAs

Town Centre	Suggested changes
Bishop's Stortford	No changes proposed to the current **Town Centre boundary**. Amend the current **PSA boundary** to reflect the distribution of existing retail and Class E uses. Specifically: - Exclude the Royal Mail building (102 South Street)
Hertford	Amend the current **Town Centre boundary** to reflect the distribution of main town centre uses and car parks. Specifically: - Exclude residential uses along Cowbridge (opposite Hartham Lane) No changes proposed to the current **PSA boundary**.
Ware	Amend the current **Town Centre boundary** to reflect the distribution of main town centre uses and car parks. Specifically: - Include the town centre car park on Baldock Street - Exclude residential uses to the west of 27 Church Street - Exclude residential uses to the east of 4 Star Street Amend the current **PSA boundary** to reflect the distribution of existing retail and Class E uses. Specifically: Exclude the residential uses to the east of 4 Star Street
Sawbridgeworth	Amend the current **Town Centre boundary** to reflect the distribution of main town centre uses and car parks. Specifically: - Include the Co-op foodstore (London Road) and customer/town centre car park - Include the main town centre uses between Bell Street and the Co-op customer/town centre car park - Include the areas to the south of Bell Street including the public house (White Lion), Central Surgery, town centre car parks, town council offices, and the small group of buildings (accessed from The Square) comprising main town centre uses Recommend defining a **PSA boundary** to reflect the distribution of existing retail and Class E uses within the centre.
Buntingford	Amend the current **Town Centre boundary** to reflect the distribution of main town centre uses and car parks. Specifically: - Exclude residential uses along Union Terrace - Exclude residential uses to the west of High Street - Recommend defining a **PSA boundary** to reflect the distribution of existing retail and Class E uses within the centre.

[15] Albeit subject to 'Prior Approval' and the need to satisfy certain criteria.

The Sequential and Impact Tests (including Local Floorspace Impact Thresholds)

9.39 Having considered District's network of centres and PSA boundaries, it will be important for policy to identify the requirements of the sequential and impact tests set out in the NPPF, as relevant:

- for sequential test purposes when assessing planning applications for main town centre uses which are neither in an existing centre nor in accordance with an up-to date plan (paragraph 91); and
- for impact test purposes when assessing planning applications for retail and leisure development outside town centres, which are not in accordance with an up-to-date local plan (paragraph 94).

9.40 These two tests are referenced in Policy RTC1 (Parts II-IV). The reference to the sequential test in Part II is limited to, *Proposals will be assessed in line with the sequential approach* – and we suggest the Council consider setting out further details, as per the NPPF, including the order of preference (i.e. town centres first, then in edge of centre locations, etc) (paragraph 91) and the requirement to demonstrate flexibility on issues such as format and scale (paragraph 92).

9.41 The NPPF (paragraph 94) makes it clear that the impact test only applies to retail and leisure development proposals over 2,500 sqm gross unless there is a different proportionate, locally set floorspace threshold.

9.42 Policy RTC1 (Part III) includes the District's locally set floorspace thresholds for impact assessments. The local floorspace impact thresholds set out are for proposals over 1,500 sqm gross within the settlement boundary of Bishop's Stortford; proposals over 1,000 sqm gross within the settlement boundary of Hertford; and proposals over 500 sqm gross elsewhere. The policy indicates that the requirement for an impact assessment concerns *retail outside the Primary Shopping Area, and leisure, office and other developments outside of town centres, which are not in accordance with policies of the District Plan.*

9.43 For clarity, policy should make it clear that the sequential test applies to all planning applications for <u>main town centre uses</u> *which are neither in an existing centre nor in accordance with an up-to date plan*; and the impact test applies to planning applications for <u>retail and leisure development</u> *outside town centres, which are not in accordance with an up-to-date local plan*. The impact test set out in the NPPF is not relevant to *office and other developments*.

9.44 In terms of the local floorspace impact thresholds that are appropriate for requiring an assessment of the impact of retail and leisure development proposals on the District's town centres, some local authorities are introducing a 'blanket' impact threshold of 280 sqm. This level of floorspace, at least with regards to shops, is significant for two main reasons:

a) The changes to the Use Classes Order include Class F2(a) defined *as 'Shops (mostly) selling essential goods, including food, where <u>the shop's premises do not exceed 280 square metres</u> and there is no other such facility within 1000 metres'* (our emphasis); and

b) Shops with an internal display and sales area below 280 sqm are exempt from Sunday trading restrictions (on the basis the Sunday Trading Act defines a 'large shop' as generally being over 280 sqm measured internally).

9.45 The implicit assumption is that shops below 280 sqm would probably not have a significant adverse impact, whereas shops exceeding this level of floorspace are unlikely to be a purely local facility and would be capable of drawing trade from outside their immediate local catchment with potential consequences for existing shops and stores in town centre locations.

9.46 **An impact threshold of 280 sqm (net sales area) or <u>350 sqm gross</u>**[16] can further be justified in the East Herts context given the limited or even negative capacity for additional retail floorspace in the District's town centres over the plan period. There is also a broad correlation between the capacity

[16] Gross floorspace is a more appropriate measure for determining when the impact test should be applied: 350 sqm gross assumes a gross to net (i.e. internal display and sales area) ratio of 80%.

for retail floorspace and the likely trading impacts of any new floorspace on existing floorspace; that being the lower the capacity forecasted, the higher the trading impacts are likely to be.

9.47 With regards to leisure floorspace, 350 sqm gross amounts to a notable scale of floorspace and is larger than many existing leisure uses within the District's centres. This report has further recommended that the Council's policy response to the increasing number of out-of-town leisure uses (e.g. gyms, fitness studios) should focus on promoting and supporting proposals for such facilities in more central locations; and an effective policy tool for controlling this trend is the impact test together with the sequential test. Therefore, we would recommend an impact threshold of 350 sqm gross is justified for leisure development proposals in the East Herts context.

9.48 If a 'blanket' impact threshold of 350 sqm gross is to be preferred, then policy should make it clear that impact assessments should be proportionate to the scale and nature of retail and/or leisure development proposed, as indicated by the PPG (paragraph 017) which states:

The impact test will need to be undertaken in a proportionate and locally appropriate way, drawing on existing information where possible. Ideally, applicants and local planning authorities should seek to agree the scope, key impacts for assessment, and level of detail required in advance of applications being submitted.

Glossary of Terms

Comparison goods: Clothing and footwear; household textiles and soft furnishings; Furniture and floor coverings; household appliances; audio visual equipment; hardware, DIY goods, decorating supplies; chemist and medical goods, cosmetics and beauty products; books, jewellery, watches, china, glassware and kitchen utensils, recreational, personal and luxury goods.

Convenience goods: Food, alcoholic drink, tobacco products, newspapers and periodicals, non-durable household goods.

Expenditure per capita: The amount of money spent on retail goods per head (or per person) in each catchment area zone. The data represents people of all ages whose usual place of residence is a private household. This excludes any people living in communal establishments (e.g. care homes, student halls of residence, prisons) (source: Experian).

Market share: The proportion of residents' expenditure secured by a particular shopping destination, derived from the household survey research.

Primary Shopping Area (PSA): Where retail development is concentrated (source: NPPF Annex 2).

Sales density: Turnover, per square metre of net sales area.

Special Forms of Trading (SFT): Sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies (source: Experian).

Turnover: Amount of retail sales per unit i.e. net sales area.

Use Classes Order (UCO): Derived from the Town and Country Planning (Use Classes) Order 1987 (as amended), the UCO puts land and buildings in England into various categories according to their type and purpose (source: Planning Portal).