

Table 1: Population and convenience goods expenditure per capita

| Zone | Population | | | | | Per capita expenditure (£) | | | | | | |
|--------------|------------------|------------------|------------------|------------------|------------------|----------------------------|-------|-------------|-------|-------|-------|-------|
| | 2017 | 2021 | 2026 | 2031 | 2036 | 2016 <i>inc SFT</i> | 2016 | Convenience | | | | |
| | | | | | | | | 2017 | 2021 | 2026 | 2031 | 2036 |
| 1 | 63,394 | 66,443 | 70,254 | 74,065 | 77,876 | 2,064 | 2,004 | 1,998 | 1,972 | 1,967 | 1,967 | 1,973 |
| 2 | 51,786 | 54,276 | 57,389 | 60,502 | 63,615 | 2,063 | 2,003 | 1,997 | 1,970 | 1,966 | 1,965 | 1,971 |
| 3 | 20,775 | 21,971 | 23,465 | 24,960 | 26,454 | 2,252 | 2,187 | 2,180 | 2,151 | 2,146 | 2,146 | 2,152 |
| 4 | 13,407 | 14,179 | 15,143 | 16,108 | 17,072 | 2,409 | 2,339 | 2,332 | 2,301 | 2,296 | 2,295 | 2,302 |
| 5 | 40,388 | 42,713 | 45,618 | 48,524 | 51,429 | 2,011 | 1,953 | 1,947 | 1,921 | 1,917 | 1,916 | 1,922 |
| 6 | 25,344 | 26,802 | 28,626 | 30,449 | 32,272 | 2,214 | 2,150 | 2,144 | 2,115 | 2,110 | 2,110 | 2,116 |
| 7 | 27,275 | 28,607 | 30,271 | 31,936 | 33,600 | 2,285 | 2,219 | 2,212 | 2,183 | 2,178 | 2,177 | 2,183 |
| 8 | 33,509 | 35,145 | 37,190 | 39,235 | 41,280 | 2,324 | 2,257 | 2,250 | 2,220 | 2,215 | 2,214 | 2,221 |
| 9 | 16,270 | 17,064 | 18,057 | 19,050 | 20,043 | 2,663 | 2,586 | 2,578 | 2,544 | 2,538 | 2,537 | 2,545 |
| 10 | 24,014 | 25,187 | 26,652 | 28,118 | 29,583 | 2,288 | 2,222 | 2,215 | 2,186 | 2,180 | 2,180 | 2,186 |
| 11 | 66,826 | 70,175 | 74,361 | 78,547 | 82,733 | 2,163 | 2,100 | 2,094 | 2,066 | 2,061 | 2,061 | 2,067 |
| 12 | 38,091 | 40,000 | 42,386 | 44,772 | 47,158 | 2,306 | 2,239 | 2,232 | 2,203 | 2,197 | 2,197 | 2,203 |
| 13 | 25,298 | 26,566 | 28,150 | 29,735 | 31,320 | 2,444 | 2,373 | 2,366 | 2,335 | 2,330 | 2,329 | 2,336 |
| 14 | 14,609 | 15,341 | 16,256 | 17,171 | 18,087 | 2,379 | 2,310 | 2,303 | 2,272 | 2,267 | 2,266 | 2,273 |
| 15 | 201,793 | 209,921 | 218,799 | 226,809 | 233,987 | 2,034 | 1,975 | 1,968 | 1,942 | 1,938 | 1,937 | 1,943 |
| 16 | 50,286 | 51,866 | 53,772 | 55,511 | 57,159 | 2,370 | 2,301 | 2,294 | 2,264 | 2,258 | 2,258 | 2,264 |
| 17 | 98,752 | 104,129 | 110,301 | 115,553 | 120,278 | 2,249 | 2,184 | 2,177 | 2,148 | 2,144 | 2,143 | 2,149 |
| 18 | 95,559 | 99,115 | 103,560 | 108,006 | 112,451 | 2,269 | 2,203 | 2,197 | 2,168 | 2,163 | 2,162 | 2,168 |
| 19 | 35,163 | 36,472 | 38,107 | 39,743 | 41,379 | 2,292 | 2,226 | 2,219 | 2,189 | 2,184 | 2,184 | 2,190 |
| 20 | 200,121 | 209,670 | 220,104 | 229,504 | 238,385 | 1,945 | 1,888 | 1,882 | 1,858 | 1,853 | 1,853 | 1,858 |
| 21 | 34,116 | 35,386 | 36,973 | 38,560 | 40,147 | 2,372 | 2,303 | 2,296 | 2,265 | 2,260 | 2,260 | 2,266 |
| 22 | 62,274 | 65,108 | 68,438 | 71,558 | 74,218 | 2,118 | 2,057 | 2,050 | 2,023 | 2,019 | 2,018 | 2,024 |
| Total | 1,239,050 | 1,296,134 | 1,363,874 | 1,428,415 | 1,490,527 | | | | | | | |

Notes:

- a. Zones based on the post code sectors shown on the plan at Appendix A
- b. Per capita expenditure derived from Experian MMG3 data (2018 report)
- c. 2016 Population derived from Experian MMG3 data (2018 report). Projections to 2036 are based on the figures set out in the Population Note at Appendix G.
- d. Per capita expenditure projected forward using forecast growth rates taken from Tables 1a and 1b of Experian Retail Planner Briefing Note 15
- e. Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Figure 5 of Appendix 3 to Experian Retail Planner Briefing Note 15

2016 Prices

Table 2a: Total convenience goods expenditure available

| Zone | Expenditure (£m) | | | | | Growth (£m) | | | |
|-------------------------------|------------------|---------------|---------------|---------------|---------------|-------------|--------------|--------------|--------------|
| | Convenience | | | | | Convenience | | | |
| | 2017 | 2021 | 2026 | 2031 | 2036 | 2017-2021 | 2017-2026 | 2017-2031 | 2017-2036 |
| 1 | 126.7 | 131.0 | 138.2 | 145.7 | 153.6 | 4.3 | 11.5 | 19.0 | 26.9 |
| 2 | 103.4 | 106.9 | 112.8 | 118.9 | 125.4 | 3.5 | 9.4 | 15.5 | 22.0 |
| 3 | 45.3 | 47.3 | 50.4 | 53.6 | 56.9 | 2.0 | 5.1 | 8.3 | 11.6 |
| 4 | 31.3 | 32.6 | 34.8 | 37.0 | 39.3 | 1.4 | 3.5 | 5.7 | 8.0 |
| 5 | 78.6 | 82.1 | 87.4 | 93.0 | 98.8 | 3.4 | 8.8 | 14.4 | 20.2 |
| 6 | 54.3 | 56.7 | 60.4 | 64.2 | 68.3 | 2.4 | 6.1 | 9.9 | 14.0 |
| 7 | 60.3 | 62.4 | 65.9 | 69.5 | 73.4 | 2.1 | 5.6 | 9.2 | 13.0 |
| 8 | 75.4 | 78.0 | 82.4 | 86.9 | 91.7 | 2.6 | 7.0 | 11.5 | 16.3 |
| 9 | 41.9 | 43.4 | 45.8 | 48.3 | 51.0 | 1.5 | 3.9 | 6.4 | 9.1 |
| 10 | 53.2 | 55.0 | 58.1 | 61.3 | 64.7 | 1.9 | 4.9 | 8.1 | 11.5 |
| 11 | 139.9 | 145.0 | 153.3 | 161.9 | 171.0 | 5.1 | 13.4 | 22.0 | 31.1 |
| 12 | 85.0 | 88.1 | 93.1 | 98.4 | 103.9 | 3.1 | 8.1 | 13.3 | 18.9 |
| 13 | 59.9 | 62.0 | 65.6 | 69.3 | 73.2 | 2.2 | 5.7 | 9.4 | 13.3 |
| 14 | 33.6 | 34.9 | 36.9 | 38.9 | 41.1 | 1.2 | 3.2 | 5.3 | 7.5 |
| 18 | 209.9 | 214.8 | 224.0 | 233.5 | 243.8 | 4.9 | 14.1 | 23.6 | 33.9 |
| 19 | 78.0 | 79.9 | 83.2 | 86.8 | 90.6 | 1.8 | 5.2 | 8.8 | 12.6 |
| 21 | 78.3 | 80.2 | 83.6 | 87.1 | 91.0 | 1.8 | 5.2 | 8.8 | 12.7 |
| Inner Study Area Total | 1355.1 | 1400.4 | 1475.9 | 1554.2 | 1637.6 | 45.3 | 120.8 | 199.1 | 282.5 |
| 15 | 397.2 | 407.8 | 424.0 | 439.4 | 454.7 | 10.5 | 26.8 | 42.2 | 57.4 |
| 16 | 115.4 | 117.4 | 121.4 | 125.3 | 129.4 | 2.1 | 6.1 | 10.0 | 14.1 |
| 17 | 215.0 | 223.7 | 236.4 | 247.6 | 258.5 | 8.7 | 21.4 | 32.6 | 43.5 |
| 20 | 376.7 | 389.5 | 407.9 | 425.2 | 443.0 | 12.8 | 31.2 | 48.5 | 66.2 |
| 22 | 127.7 | 131.7 | 138.1 | 144.4 | 150.2 | 4.0 | 10.5 | 16.7 | 22.5 |
| Study Area Total | 2587.1 | 2670.5 | 2803.8 | 2936.2 | 3073.4 | 83.4 | 216.8 | 349.2 | 486.3 |

Table 2b: Convenience goods expenditure split between main food shopping and top-up food shopping spend

| Zone | Expenditure (£m) | | |
|--------------|--------------------|--------------|----------------|
| | Convenience (2017) | | |
| | Main | Top-up | Total |
| 1 | 105.4 | 21.3 | 126.7 |
| 2 | 88.0 | 15.4 | 103.4 |
| 3 | 33.7 | 11.6 | 45.3 |
| 4 | 25.4 | 5.9 | 31.3 |
| 5 | 63.8 | 14.8 | 78.6 |
| 6 | 45.2 | 9.1 | 54.3 |
| 7 | 48.9 | 11.4 | 60.3 |
| 8 | 62.8 | 12.6 | 75.4 |
| 9 | 32.5 | 9.4 | 41.9 |
| 10 | 43.5 | 9.7 | 53.2 |
| 11 | 118.8 | 21.1 | 139.9 |
| 12 | 62.4 | 22.6 | 85.0 |
| 13 | 47.6 | 12.2 | 59.9 |
| 14 | 25.6 | 8.0 | 33.6 |
| 15 | 334.1 | 63.2 | 397.2 |
| 16 | 93.5 | 21.8 | 115.4 |
| 17 | 172.4 | 42.6 | 215.0 |
| 18 | 171.4 | 38.5 | 209.9 |
| 19 | 63.5 | 14.6 | 78.0 |
| 20 | 297.3 | 79.4 | 376.7 |
| 21 | 66.1 | 12.2 | 78.3 |
| 22 | 106.9 | 20.8 | 127.7 |
| Total | 2,108.7 | 478.3 | 2,587.1 |

Notes:
a. Figures derived from multiplying per capita expenditure with population within each zone using data provided at Table 1
b. Ratio of main food shopping to top-up food shopping per zone derived directly from Questions 9 and 15 of the NEMS Household Survey (December 2017)

2016 Prices

South West Metropolitan Road & Leisure Study

Table 2 Conversion game playing patterns

| Game | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | Zone 9 | Zone 10 | Zone 11 | Zone 12 | Zone 13 | Zone 14 | Zone 15 | Zone 16 | Zone 17 | Zone 18 | Zone 19 | Zone 20 | Zone 21 | Zone 22 |
|----------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Subtotal | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 1 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 2 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 3 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 4 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 5 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 6 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 7 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 8 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 9 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 10 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 11 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 12 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 13 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 14 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 15 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 16 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 17 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 18 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 19 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 20 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 21 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 22 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

A zone based on the road network

A road based on the road network

A road based on the road network

South West Metropolitan Road & Leisure Study

Table 4 - Conversion grade schedule

Table with columns for various road types and zones (Zone 1 to Zone 25) showing conversion grades. The table is organized into multiple sections, each with a 'Subtotal' row at the end of the section. Each cell contains numerical values representing conversion grades for different road types.

Notes: 1. Data based on 2011 census data. 2. Conversion grades are based on the 2011 census data.

Table 6a: Estimated 'capacity' for new convenience goods facilities in South West Hertfordshire (all five authority areas)

| Year | Benchmark Turnover (£m) ¹ | Survey Turnover (£m) ² | Inflow (£m) | Designated Centre Overtrading (£m) | Surplus Expenditure (£m) |
|-----------------------------|--------------------------------------|-----------------------------------|-------------|------------------------------------|--------------------------|
| 2017 | 1,152.9 | 1,375.7 | 36.0 | 140.3 | 118.4 |
| 2021 | 1,148.3 | 1,420.0 | 36.4 | 139.8 | 168.4 |
| 2026 | 1,149.4 | 1,491.0 | 36.8 | 139.9 | 238.5 |
| 2031 | 1,155.2 | 1,561.4 | 37.3 | 140.6 | 302.9 |
| 2036 | 1,161.0 | 1,634.3 | 37.7 | 141.3 | 369.7 |
| Study Area Market Share (%) | | 53.2 | | | |

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15 (December 2017)
2. Assumes constant market share claimed by South West Hertfordshire facilities at 53.2% from the Study Area
3. Designated Centre Overtrading is the surplus positive turnover of all stores within designated Centres within the five authority areas from Table 5
2016 Prices

Table 6b: Gross quantitative capacity for additional convenience goods floorspace in South West Hertfordshire

| Year | Surplus Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|--------------------------|--------------------------------|------------------|
| | | Min ¹ | Max ² |
| 2017 | 118.4 | 10,200 | 13,000 |
| 2021 | 168.4 | 14,600 | 18,500 |
| 2026 | 238.5 | 20,600 | 26,200 |
| 2031 | 302.9 | 26,000 | 33,000 |
| 2036 | 369.7 | 31,600 | 40,100 |

1. Average sales density assumed to be £11,605 per sq.m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2016
2. Average sales density assumed to be £9,137 per sq.m (rounded) based on the average sales density of discount operators as identified by Verdict 2016
3. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15 (December 2017)
2016 Prices

Table 6c: Extant convenience goods commitments in South West Hertfordshire

| Destination | Reference | Proposal | Net Convenience Floorspace (sq m) | Estimated Sales Density (£/sq m) | Estimated Convenience Turnover (£m) |
|--------------|---|--|--|----------------------------------|-------------------------------------|
| Hertsmere | N/A | Over 40 applications involving development to or from A classes have extant permission. However, none are sizable and most relate to changes of use of small High Street units. The extant permissions are judged largely to be neutral in floorspace terms. | 0 | 0 | 0.0 |
| Three Rivers | 16/0005/FUL, South Oxhey regeneration | The approved Development Schedule sets out the type and maximum quantity of development that can be provided across the South Oxhey redevelopment as a whole. This permits up to 5,137 sqm of flexible town centre uses (Classes A1-A5, D1, D2, B1 and Bookmakers) including a Lidl foodstore of up to 1,714 sqm. The foodstore is proposed to be delivered within Phase 3A and would therefore form part of a subsequent RM application. | Lidl store assumed 1,714 sq m gross = 1,100 sq m net x 80% convenience goods area = 880 sq m net. Remaining new floorspace is likely to be replacement convenience goods floorspace so no further allowance is made. | 4,800 | 4.2 |
| Dacorum | 4/00424/15/MOA, Jarman Park, St Albans Hill, Hemel Hempstead (revised application 4/00595/18/MFA) | The proposed development involves the erection of Class A1 retail development (to include convenience and comparison retail floorspace and ancillary cafe) and Class A3 drive thru cafe/restaurant (with ancillarytakeaway) unit together with access, car parking, service yard and associated works. | Net convenience floorspace is 1,184 sq m net and is anticipated to be occupied by Lidl. Net comparison floorspace is 7,400 sq m net. | 4,800 | 5.7 |
| Dacorum | 4/01317/14/MFA, Gossoms End, Berkhamstead | Full Planning permission (4/01317/14/MFA) has been granted for a 1,884 sq m gross Lidl store and 30 flats. The development has not been implemented, but a number of applications to discharge the planning conditions have been submitted recently, which suggests that a start on site is imminent. | Net floorspace is 1,281 sq m net x 80% convenience goods area = 1,025 sq m | 4,800 | 4.9 |
| Dacorum | 4/03157/16/MFA, Aviva site, Maylands Avenue, Hemel Hempstead | Outline planning permission (4/01132/15/MOA) has been granted for retail development (12,503 sq. metres), offices (3,004 sq. metres) and restaurants (650 sqm) at this site. The conditions attached to this permission stipulate that the net retail floor area shall not exceed 9,290 sq. metres. comprising a maximum of: • 1,414 sq. metres of convenience food goods • 7,848 sq. metres of comparison non-food goods The Council has now granted a reserved matters application (4/03157/16/MFA). This application proposes an increase in net convenience floorspace to 1,950 sqm. | 1,950 | 10,000 | 19.5 |
| Watford | 16/00076/VAR, Charter Place, Watford | Part demolition/reconfiguration/change of use of existing Charter Place Shopping Centre, demolition of 37-57 and 67-69 High Street, and part retention of 63-65, High Street. Erection of new buildings within Classes A1 (shops), A3 (restaurants) and D2 (including cinema), including provision of new covered market, together with associated plant and machinery, and ancillary facilities. Provision of new public realm. Alterations to existing pedestrian and cycle access and egress arrangements, highway alterations/ improvements and other ancillary works and operations. Variation of Condition 2 of planning permission ref. 14/00779/VAR to incorporate amendments to the ground and first floor retail units, second floor leisure unit, design of the high level glazed canopy, reorientation of the escalators and stairs within the central space and other minor amendments. | Gross floorspace additions of 10,291 sq m. We have assumed that the net:gross ratio is 70% = 7,204 sq m net. We have further assumed that 20% of this total will be dedicated to convenience goods = 1,441 sqm net. | 9,000 | 13.0 |
| St Albans | 5/2016/3386, Griffiths Way South | Outline application (access and scale sought) for mixed use development comprising Class A1 (discount foodstore), Class A1 (non food retail), D2 (gym) and Class A3/A5 (restaurant and drive-through) | 1,921 | 6,767 | 13.0 |
| Total | | | 8,029 | | 60.3 |

2016 Prices

Table 6d: Net quantitative capacity for additional convenience goods floorspace in South West Hertfordshire

| Year | Surplus Expenditure (£m) | Commitments (£m) | Residual Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|--------------------------|------------------|---------------------------|--------------------------------|------------------|
| | | | | Min ¹ | Max ² |
| 2017 | 118.4 | 60.3 | 58.2 | 5,000 | 6,400 |
| 2021 | 168.4 | 60.1 | 108.3 | 9,400 | 11,900 |
| 2026 | 238.5 | 60.1 | 178.3 | 15,400 | 19,600 |
| 2031 | 302.9 | 60.4 | 242.4 | 20,800 | 26,500 |
| 2036 | 369.7 | 60.7 | 309.0 | 26,400 | 33,600 |

1. Average sales density assumed to be £11,605 per sq.m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2016
2. 50% of residual expenditure assumed to be consumed by leading four supermarkets (£11,605 per sq m) and 50% assumed to be consumed by discount operators (£6,670 per sq m) as identified by Verdict 2016. This equates to £9,137/sq m.
3. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15 (December 2017)
2016 Prices

Table 6e: Estimated 'capacity' for new convenience goods facilities in Hertsme

| Year | Benchmark Turnover (£m) ¹ | Survey Turnover (£m) ² | Inflow (£m) | Designated Centre Overtrading (£m) | Surplus Expenditure (£m) |
|------------------------------------|---|--------------------------------------|----------------|---------------------------------------|-----------------------------|
| 2017 | 201.4 | 199.3 | 0.0 | 24.2 | -26.3 |
| 2021 | 200.6 | 205.7 | 0.0 | 24.1 | -19.0 |
| 2026 | 200.8 | 215.9 | 0.0 | 24.3 | -9.2 |
| 2031 | 201.8 | 226.1 | 0.0 | 24.5 | -0.1 |
| 2036 | 202.8 | 236.7 | 0.0 | 24.6 | 9.3 |
| Study Area Market Share (%) | | 7.7 | | | |

- Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15 (December 2017)
 - Assumes constant market share claimed by Hertsme facilities at 7.7% from the Study Area (allows for no inflow uplift)
 - Designated Centre Overtrading is the surplus positive turnover of all stores within designated Centres within Hertsme from Table 5
- 2016 Prices

Table 6f: Gross quantitative capacity for additional convenience goods floorspace in Hertsme

| Year | Surplus Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|-----------------------------|--------------------------------|------------------|
| | | Min ¹ | Max ² |
| 2017 | -26.3 | -2,300 | -2,900 |
| 2021 | -19.0 | -1,600 | -2,100 |
| 2026 | -9.2 | -800 | -1,000 |
| 2031 | -0.1 | 0 | 0 |
| 2036 | 9.3 | 800 | 1,000 |

- Average sales density assumed to be £11,605 per sq.m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2016
 - Average sales density assumed to be £9,137 per sq.m (rounded) based on the average sales density of discount operators as identified by Verdict 2016
 - Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15 (December 2017)
- 2016 Prices

Table 6g: Extant convenience goods commitments in Hertsme

| Destination | Reference | Proposal | Net Convenience Floorspace (sq m) | Estimated Sales Density (£/sq m) | Estimated Convenience Turnover (£m) |
|--------------|-----------|--|--------------------------------------|-------------------------------------|--|
| Hertsme | N/A | Over 40 applications involving development to or from A classes have extant permission. However, none are sizable and most relate to changes of use of small High Street units. The extant permissions are judged largely to be neutral in floorspace terms. | 0 | 0 | 0.0 |
| Total | | | 0 | | 0.0 |

2016 Prices

Table 6h: Net quantitative capacity for additional convenience goods floorspace in Hertsme

| Year | Surplus Expenditure (£m) | Commitments (£m) | Residual Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|-----------------------------|---------------------|------------------------------|--------------------------------|------------------|
| | | | | Min ¹ | Max ² |
| 2017 | -26.3 | 0.0 | -26.3 | -2,300 | -2,900 |
| 2021 | -19.0 | 0.0 | -19.0 | -1,600 | -2,100 |
| 2026 | -9.2 | 0.0 | -9.2 | -800 | -1,000 |
| 2031 | -0.1 | 0.0 | -0.1 | 0 | 0 |
| 2036 | 9.3 | 0.0 | 9.3 | 800 | 1,000 |

- Average sales density assumed to be £11,605 per sq.m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2016
 - 50% of residual expenditure assumed to be consumed by leading four supermarkets (£11,605 per sq m) and 50% assumed to be consumed by discount operators (£6,670 per sq m) as identified by Verdict 2016. This equates to £9,137/sq m.
 - Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15 (December 2017)
- 2016 Prices

Table 6i: Estimated 'capacity' for new convenience goods facilities in Three Rivers

| Year | Benchmark Turnover (£m) ¹ | Survey Turnover (£m) ² | Inflow (£m) | Designated Centre Overtrading (£m) | Surplus Expenditure (£m) |
|-----------------------------|--------------------------------------|-----------------------------------|-------------|------------------------------------|--------------------------|
| 2017 | 104.3 | 148.7 | 0.0 | 44.5 | -0.1 |
| 2021 | 103.9 | 153.5 | 0.0 | 44.3 | 5.3 |
| 2026 | 104.0 | 161.1 | 0.0 | 44.3 | 12.8 |
| 2031 | 104.5 | 168.8 | 0.0 | 44.6 | 19.7 |
| 2036 | 105.0 | 176.6 | 0.0 | 44.8 | 26.8 |
| Study Area Market Share (%) | | 5.7 | | | |

- Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15 (December 2017)
- Assumes constant market share claimed by Three Rivers facilities at 5.7% from the Study Area (allows for no inflow uplift)
- Designated Centre Overtrading is the surplus positive turnover of all stores within designated Centres within Three Rivers from Table 5

2016 Prices

Table 6j: Gross quantitative capacity for additional convenience goods floorspace in Three Rivers

| Year | Surplus Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|--------------------------|--------------------------------|------------------|
| | | Min ¹ | Max ² |
| 2017 | -0.1 | 0 | 0 |
| 2021 | 5.3 | 500 | 600 |
| 2026 | 12.8 | 1,100 | 1,400 |
| 2031 | 19.7 | 1,700 | 2,200 |
| 2036 | 26.8 | 2,300 | 2,900 |

- Average sales density assumed to be £11,605 per sq.m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2016
- Average sales density assumed to be £9,137 per sq.m (rounded) based on the average sales density of discount operators as identified by Verdict 2016
- Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15 (December 2017)

2016 Prices

Table 6k: Extant convenience goods commitments in Three Rivers

| Destination | Reference | Proposal | Net Convenience Floorspace (sq m) | Estimated Sales Density (£/sq m) | Estimated Convenience Turnover (£m) |
|--------------|---------------------------------------|---|--|----------------------------------|-------------------------------------|
| Three Rivers | 16/0005/FUL, South Oxhey regeneration | The approved Development Schedule sets out the type and maximum quantity of development that can be provided across the South Oxhey redevelopment as a whole. This permits up to 5,137 sqm of flexible town centre uses (Classes A1-A5, D1, D2, B1 and Bookmakers) including a Lidl foodstore of up to 1,714 sqm. The foodstore is proposed to be delivered within Phase 3A and would therefore form part of a subsequent RM application. | Lidl store assumed 1,714 sq m gross = 1,100 sq m net x 80% convenience goods area = 880 sq m net. Remaining new floorspace is likely to be replacement convenience goods floorspace so no further allowance is made. | 4,800 | 4.2 |
| Total | | | 880 | | 4.2 |

2016 Prices

Table 6l: Net quantitative capacity for additional convenience goods floorspace in Three Rivers

| Year | Surplus Expenditure (£m) | Commitments (£m) | Residual Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|--------------------------|------------------|---------------------------|--------------------------------|------------------|
| | | | | Min ¹ | Max ² |
| 2017 | -0.1 | 4.2 | -4.3 | -400 | -500 |
| 2021 | 5.3 | 4.2 | 1.1 | 100 | 100 |
| 2026 | 12.8 | 4.2 | 8.6 | 700 | 900 |
| 2031 | 19.7 | 4.2 | 15.5 | 1,300 | 1,700 |
| 2036 | 26.8 | 4.3 | 22.6 | 1,900 | 2,500 |

- Average sales density assumed to be £11,605 per sq.m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2016
- 50% of residual expenditure assumed to be consumed by leading four supermarkets (£11,605 sq m) and 50% assumed to be consumed by discount operators (£6,670 per sq m) as identified by Verdict 2016. This equates to £9,137/sq m.
- Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15 (December 2017)

2016 Prices

Table 6m: Estimated 'capacity' for new convenience goods facilities in Dacorum

| Year | Benchmark Turnover (£m) ¹ | Survey Turnover (£m) ² | Inflow (£m) | Surplus Expenditure (£m) |
|------------------------------------|--------------------------------------|-----------------------------------|-------------|--------------------------|
| 2017 | 265.3 | 389.4 | 0.0 | 124.2 |
| 2021 | 264.2 | 402.0 | 0.0 | 137.8 |
| 2026 | 264.5 | 422.1 | 0.0 | 157.6 |
| 2031 | 265.8 | 442.0 | 0.0 | 176.2 |
| 2036 | 267.1 | 462.7 | 0.0 | 195.5 |
| Study Area Market Share (%) | | 15.1 | | |

- Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15 (December 2017)
- Assumes constant market share claimed by Dacorum facilities at 15.1% from the Study Area (allows for no inflow uplift)
- Designated Centre Overtrading is the surplus positive turnover of all stores within designated Centres within Dacorum from Table 5

2016 Prices

Table 6n: Gross quantitative capacity for additional convenience goods floorspace in Dacorum

| Year | Surplus Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|--------------------------|--------------------------------|------------------|
| | | Min ¹ | Max ² |
| 2017 | 124.2 | 10,700 | 13,600 |
| 2021 | 137.8 | 11,900 | 15,100 |
| 2026 | 157.6 | 13,600 | 17,300 |
| 2031 | 176.2 | 15,200 | 19,200 |
| 2036 | 195.5 | 16,700 | 21,200 |

- Average sales density assumed to be £11,605 per sq.m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2016
- Average sales density assumed to be £9,137 per sq.m (rounded) based on the average sales density of discount operators as identified by Verdict 2016
- Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15 (December 2017)

2016 Prices

Table 6o: Extant convenience goods commitments in Dacorum

| Destination | Reference | Proposal | Net Convenience Floorspace (sq m) | Estimated Sales Density (£/sq m) | Estimated Convenience Turnover (£m) |
|--------------|---|--|--|----------------------------------|-------------------------------------|
| Dacorum | 4/00424/15/MOA, Jarman Park, St Albans Hill, Hemel Hempstead (revised application 4/00595/18/MFA) | The proposed development involves the erection of Class A1 retail development (to include convenience and comparison retail floorspace and ancillary cafe) and Class A3 drive thru café/restaurant (with ancillarytakeaway) unit together with access, car parking, service yard and associated works. | Net convenience floorspace is 1,184 sq m net and is anticipated to be occupied by Lidl. Net comparison floorspace is 7,400 sq m net. | 4,800 | 5.7 |
| Dacorum | 4/01317/14/MFA, Gossoms End, Berkhamstead | Full Planning permission (4/01317/14/MFA) has been granted for a 1,884 sq m gross Lidl store and 30 flats. The development has not been implemented, but a number of applications to discharge the planning conditions have been submitted recently, which suggests that a start on site is imminent. | Net floorspace is 1,281 sq m net x 80% convenience goods area = 1,025 sq m | 4,800 | 4.9 |
| Dacorum | 4/03157/16/MFA, Aviva site, Maylands Avenue, Hemel Hempstead | Outline planning permission (4/01132/15/MOA) has been granted for retail development (12,503 sq. metres), offices (3,004 sq. metres) and restaurants (650 sqm) at this site. The conditions attached to this permission stipulate that the net retail floor area shall not exceed 9,290 sq. metres, comprising a maximum of: <ul style="list-style-type: none"> 1,414 sq. metres of convenience food goods 7,848 sq. metres of comparison non-food goods The Council has now granted a reserved matters application (4/03157/16/MFA). This application proposes an increase in net convenience floorspace to 1,950 sqm. | 1,950 | 10,000 | 19.5 |
| Total | | | 4,159 | | 30.1 |

2016 Prices

Table 6p: Net quantitative capacity for additional convenience goods floorspace in Dacorum

| Year | Surplus Expenditure (£m) | Commitments (£m) | Residual Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|--------------------------|------------------|---------------------------|--------------------------------|------------------|
| | | | | Min ¹ | Max ² |
| 2017 | 124.2 | 30.1 | 94.1 | 8,100 | 10,300 |
| 2021 | 137.8 | 30.0 | 107.8 | 9,300 | 11,800 |
| 2026 | 157.6 | 30.0 | 127.6 | 11,000 | 14,000 |
| 2031 | 176.2 | 30.2 | 146.0 | 12,600 | 15,900 |
| 2036 | 195.5 | 30.3 | 165.2 | 14,100 | 17,900 |

- Average sales density assumed to be £11,605 per sq.m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2016
- 50% of residual expenditure assumed to be consumed by leading four supermarkets (£11,605 sq m) and 50% assumed to be consumed by discount operators (£6,670 per sq m) as identified by Verdict 2016. This equates to £9,137/sq m.
- Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15 (December 2017)

2016 Prices

Table 6q: Estimated 'capacity' for new convenience goods facilities in Watford

| Year | Benchmark Turnover (£m) ¹ | Survey Turnover (£m) ² | Inflow (£m) | Surplus Expenditure (£m) |
|------------------------------------|--------------------------------------|-----------------------------------|-------------|--------------------------|
| 2017 | 303.0 | 319.2 | 0.0 | 16.2 |
| 2021 | 301.8 | 329.5 | 0.0 | 27.7 |
| 2026 | 302.1 | 346.0 | 0.0 | 43.9 |
| 2031 | 303.6 | 362.3 | 0.0 | 58.7 |
| 2036 | 305.2 | 379.2 | 0.0 | 74.1 |
| Study Area Market Share (%) | | 12.3 | | |

- Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15 (December 2017)
- Assumes constant market share claimed by Watford facilities at 12.3% from the Study Area (allows for no inflow uplift)
- Designated Centre Overtrading is the surplus positive turnover of all stores within designated Centres within Watford from Table 5

2016 Prices

Table 6r: Gross quantitative capacity for additional convenience goods floorspace in Watford

| Year | Surplus Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|--------------------------|--------------------------------|------------------|
| | | Min ¹ | Max ² |
| 2017 | 16.2 | 1,400 | 1,800 |
| 2021 | 27.7 | 2,400 | 3,000 |
| 2026 | 43.9 | 3,800 | 4,800 |
| 2031 | 58.7 | 5,000 | 6,400 |
| 2036 | 74.1 | 6,300 | 8,000 |

- Average sales density assumed to be £11,605 per sq.m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2016
- Average sales density assumed to be £9,137 per sq.m (rounded) based on the average sales density of discount operators as identified by Verdict 2016
- Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15 (December 2017)

2016 Prices

Table 6s: Extant convenience goods commitments in Watford

| Destination | Reference | Proposal | Net Convenience Floorspace (sq m) | Estimated Sales Density (£/sq m) | Estimated Convenience Turnover (£m) |
|--------------|--------------------------------------|---|---|----------------------------------|-------------------------------------|
| Watford | 16/00076/VAR, Charter Place, Watford | Part demolition/reconfiguration/change of use of existing Charter Place Shopping Centre, demolition of 37-57 and 67-69 High Street, and part retention of 63-65, High Street. Erection of new buildings within Classes A1 (shops), A3 (restaurants) and D2 (including cinema), including provision of new covered market, together with associated plant and machinery, and ancillary facilities. Provision of new public realm. Alterations to existing pedestrian and cycle access and egress arrangements, highway alterations/improvements and other ancillary works and operations. Variation of Condition 2 of planning permission ref. 14/00779/VAR to incorporate amendments to the ground and first floor retail units, second floor leisure unit, design of the high level glazed canopy, reorientation of the escalators and stairs within the central space and other minor amendments. | Gross floorspace additions of 10,291 sq m. We have assumed that the net:gross ratio is 70% = 7,204 sq m net. We have further assumed that 20% of this total will be dedicated to convenience goods = 1,441 sqm net. | 9,000 | 13.0 |
| Total | | | 1,441 | | 13.0 |

2016 Prices

Table 6t: Net quantitative capacity for additional convenience goods floorspace in Watford

| Year | Surplus Expenditure (£m) | Commitments (£m) | Residual Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|--------------------------|------------------|---------------------------|--------------------------------|------------------|
| | | | | Min ¹ | Max ² |
| 2017 | 16.2 | 13.0 | 3.2 | 300 | 400 |
| 2021 | 27.7 | 12.9 | 14.8 | 1,300 | 1,600 |
| 2026 | 43.9 | 12.9 | 30.9 | 2,700 | 3,400 |
| 2031 | 58.7 | 13.0 | 45.7 | 3,900 | 5,000 |
| 2036 | 74.1 | 13.1 | 61.0 | 5,200 | 6,600 |

- Average sales density assumed to be £11,605 per sq.m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2016
- 50% of residual expenditure assumed to be consumed by leading four supermarkets (£11,605 sq m) and 50% assumed to be consumed by discount operators (£6,670 per sq m) as identified by Verdict 2016. This equates to £9,137/sq m.
- Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15 (December 2017)

2016 Prices

Table 6u: Estimated 'capacity' for new convenience goods facilities in St Albans

| Year | Benchmark Turnover (£m) ¹ | Survey Turnover (£m) ² | Inflow (£m) | Designated Centre Overtrading (£m) | Surplus Expenditure (£m) |
|-----------------------------|---|--------------------------------------|----------------|---------------------------------------|-----------------------------|
| 2017 | 278.9 | 319.1 | 36.0 | 71.7 | 4.5 |
| 2021 | 277.8 | 329.4 | 36.4 | 71.4 | 16.6 |
| 2026 | 278.1 | 345.8 | 36.8 | 71.5 | 33.1 |
| 2031 | 279.4 | 362.1 | 37.3 | 71.8 | 48.1 |
| 2036 | 280.8 | 379.1 | 37.7 | 72.2 | 63.7 |
| Study Area Market Share (%) | | 12.3 | | | |

- Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15 (December 2017)
- Assumes constant market share claimed by St Albans facilities at 12.3% from the Study Area
- Designated Centre Overtrading is the surplus positive turnover of all stores within designated Centres within St Albans from Table 5

2016 Prices

Table 6v: Gross quantitative capacity for additional convenience goods floorspace in St Albans

| Year | Surplus Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|-----------------------------|--------------------------------|------------------|
| | | Min ¹ | Max ² |
| 2017 | 4.5 | 400 | 500 |
| 2021 | 16.6 | 1,400 | 1,800 |
| 2026 | 33.1 | 2,900 | 3,600 |
| 2031 | 48.1 | 4,100 | 5,300 |
| 2036 | 63.7 | 5,500 | 6,900 |

- Average sales density assumed to be £11,605 per sq.m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2016
- Average sales density assumed to be £9,137 per sq.m (rounded) based on the average sales density of discount operators as identified by Verdict 2016
- Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15 (December 2017)

2016 Prices

Table 6w: Extant convenience goods commitments in St Albans

| Destination | Reference | Proposal | Net Convenience Floorspace (sq m) | Estimated Sales Density (£/sq m) | Estimated Convenience Turnover (£m) |
|---------------------|-------------|---|--------------------------------------|-------------------------------------|--|
| Griffiths Way South | 5/2016/3386 | Outline application (access and scale sought) for mixed use development comprising Class A1 (discount foodstore), Class A1 (non food retail), D2 (gym) and Class A3/A5 (restaurant and drive-through) | 1,921 | 6,767 | 13.0 |
| Total | | | 1,921 | | 13.0 |

2016 Prices

Table 6x: Net quantitative capacity for additional convenience goods floorspace in St Albans

| Year | Surplus Expenditure (£m) | Commitments (£m) | Residual Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|-----------------------------|---------------------|------------------------------|--------------------------------|------------------|
| | | | | Min ¹ | Max ² |
| 2017 | 4.5 | 13.0 | -8.5 | -700 | -900 |
| 2021 | 16.6 | 12.9 | 3.6 | 300 | 400 |
| 2026 | 33.1 | 13.0 | 20.1 | 1,700 | 2,200 |
| 2031 | 48.1 | 13.0 | 35.1 | 3,000 | 3,800 |
| 2036 | 63.7 | 13.1 | 50.6 | 4,300 | 5,500 |

- Average sales density assumed to be £11,605 per sq.m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2016
- 50% of residual expenditure assumed to be consumed by leading four supermarkets (£11,605 sq m) and 50% assumed to be consumed by discount operators (£6,670 per sq m) as identified by Verdict 2016. This equates to £9,137/sq m.
- Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 15 (December 2017)

2016 Prices

Table 7a: Population

Table with columns for Zone, 2017, 2021, 2026, 2031, and 2036. Rows list zones 1 through 22 and a Total row.

Table 7b: Comparison goods expenditure per capita

Large table with multiple columns for Comparison goods expenditure per capita (£) across years 2017, 2021, 2026, 2031, and 2036. Includes sub-headers for '2017 with SFT' and various categories like Clothes, CDs etc, Household, Recreation, Chemical, Electrical, DIY, Furniture, Total.

Notes:
a. Zones based on the post code sectors shown on the plan at Appendix A.
b. Per capita expenditure derived from Experian MMG3 data (2017 report)
c. Population derived from Experian MMG3 data (2017 report)
d. Per capita expenditure projected forward using forecast growth rates taken from Tables 1a and 1b of Experian Retail Planner Briefing Note 15
e. Expenditure excludes Special Forms of Trading in line with 'adjusted allowance' derived from Figure 5 of Appendix 3 of Experian Retail Planner Briefing Note 15

Table 8: Total comparison goods expenditure available

| Zone | Comparison goods expenditure (£m) | | | | | | | | | | Comparison goods expenditure (£m) | | | | | | | | | | Comparison goods expenditure (£m) | | | | | | | | | | Comparison goods expenditure (£m) | | | | | | | | | | Comparison goods growth (£m) | | | | | | | | | | | | | | | | | | |
|------------------------|-----------------------------------|-----------|------------|---------|------------|-------|-----------|-------|---------|---------|-----------------------------------|------------|---------|------------|-------|-----------|-------|---------|---------|-----------|-----------------------------------|---------|------------|-------|-----------|-------|---------|---------|-----------|------------|-----------------------------------|------------|-------|-----------|-------|---------|---------|-----------|------------|---------|------------------------------|-------|-----------|-------|-----------|-----------|-----------|-----------|---------|--|-----------|--|--|--|--|-----------|--|--|--|
| | 2017 | | | | | | | | | | 2021 | | | | | | | | | | 2026 | | | | | | | | | | 2031 | | | | | | | | | | 2017-2021 | | | | | 2017-2026 | | | | | 2017-2031 | | | | | 2017-2036 | | | |
| Clothes | CDs etc | Household | Recreation | Chemist | Electrical | DIY | Furniture | Total | Clothes | CDs etc | Household | Recreation | Chemist | Electrical | DIY | Furniture | Total | Clothes | CDs etc | Household | Recreation | Chemist | Electrical | DIY | Furniture | Total | Clothes | CDs etc | Household | Recreation | Chemist | Electrical | DIY | Furniture | Total | Clothes | CDs etc | Household | Recreation | Chemist | Electrical | DIY | Furniture | Total | 2017-2021 | 2017-2026 | 2017-2031 | 2017-2036 | | | | | | | | | | | |
| 1 | 58.6 | 10.7 | 54.0 | 22.1 | 7.9 | 15.2 | 11.7 | 16.2 | 196.3 | 65.8 | 12.0 | 60.5 | 24.8 | 8.9 | 17.0 | 13.1 | 18.2 | 220.2 | 80.8 | 14.7 | 74.4 | 30.4 | 10.9 | 20.9 | 16.1 | 22.4 | 270.6 | 99.1 | 18.1 | 91.5 | 37.4 | 13.4 | 25.7 | 19.8 | 27.5 | 332.5 | 122.0 | 22.2 | 112.3 | 45.9 | 16.5 | 31.5 | 24.3 | 33.8 | 408.5 | 23.9 | 74.3 | 136.1 | 212.2 | | | | | | | | | | |
| 2 | 45.3 | 8.0 | 45.0 | 18.7 | 5.9 | 12.7 | 8.9 | 12.9 | 157.4 | 50.9 | 9.0 | 50.4 | 21.0 | 6.6 | 14.3 | 10.0 | 14.5 | 176.6 | 62.5 | 11.1 | 62.0 | 25.8 | 8.1 | 17.6 | 12.2 | 17.8 | 217.0 | 76.7 | 13.6 | 76.2 | 31.7 | 10.0 | 21.6 | 15.0 | 21.8 | 266.6 | 94.3 | 16.7 | 93.5 | 38.9 | 12.2 | 26.5 | 18.5 | 26.8 | 327.6 | 19.1 | 59.5 | 109.2 | 170.1 | | | | | | | | | | |
| 3 | 21.4 | 4.4 | 20.5 | 8.8 | 3.0 | 5.9 | 5.1 | 6.8 | 75.6 | 24.2 | 5.0 | 23.2 | 10.0 | 3.4 | 6.6 | 5.7 | 7.4 | 85.5 | 30.0 | 6.2 | 28.7 | 12.4 | 4.2 | 8.3 | 7.1 | 9.2 | 106.1 | 37.2 | 7.7 | 35.7 | 15.3 | 5.2 | 10.2 | 6.8 | 11.5 | 131.6 | 46.1 | 9.5 | 44.1 | 19.0 | 6.4 | 12.7 | 10.9 | 14.2 | 163.9 | 10.0 | 30.6 | 56.0 | 87.4 | | | | | | | | | | |
| 4 | 16.4 | 3.4 | 14.9 | 6.2 | 2.0 | 4.3 | 3.9 | 4.8 | 56.0 | 18.6 | 3.8 | 16.9 | 7.0 | 2.3 | 4.8 | 4.4 | 5.5 | 63.4 | 23.0 | 4.8 | 21.0 | 8.7 | 2.9 | 6.0 | 5.5 | 6.8 | 78.6 | 28.5 | 5.9 | 26.0 | 10.8 | 3.5 | 7.5 | 6.8 | 8.4 | 97.5 | 35.4 | 7.3 | 32.2 | 13.4 | 4.4 | 9.2 | 8.4 | 10.4 | 120.7 | 7.4 | 22.7 | 41.5 | 64.8 | | | | | | | | | | |
| 5 | 35.3 | 6.4 | 34.0 | 14.0 | 4.4 | 9.9 | 6.9 | 9.5 | 120.4 | 39.9 | 7.2 | 38.5 | 15.8 | 4.9 | 11.2 | 7.8 | 10.8 | 136.2 | 49.5 | 8.9 | 47.8 | 19.6 | 6.1 | 13.9 | 9.7 | 13.4 | 169.1 | 61.3 | 11.1 | 59.3 | 24.4 | 7.6 | 17.3 | 12.0 | 16.6 | 209.6 | 76.1 | 13.7 | 73.4 | 30.2 | 9.4 | 21.4 | 14.9 | 20.6 | 259.6 | 15.9 | 48.7 | 89.2 | 139.2 | | | | | | | | | | |
| 6 | 23.6 | 4.9 | 23.0 | 10.3 | 3.5 | 6.9 | 5.7 | 7.3 | 85.1 | 26.7 | 5.5 | 26.0 | 11.6 | 4.0 | 7.8 | 6.5 | 8.2 | 96.3 | 33.1 | 6.9 | 32.3 | 14.4 | 4.9 | 9.7 | 8.1 | 10.2 | 119.6 | 40.9 | 8.5 | 40.0 | 17.9 | 6.1 | 12.0 | 10.0 | 12.7 | 148.2 | 50.8 | 10.6 | 49.5 | 22.1 | 7.6 | 14.9 | 12.4 | 15.7 | 183.6 | 11.2 | 34.4 | 63.1 | 98.5 | | | | | | | | | | |
| 7 | 28.1 | 5.6 | 27.3 | 11.5 | 3.9 | 7.6 | 6.6 | 9.2 | 99.8 | 31.6 | 6.2 | 30.7 | 12.9 | 4.3 | 8.6 | 7.4 | 10.3 | 112.0 | 38.8 | 7.7 | 37.7 | 15.8 | 5.3 | 10.5 | 9.1 | 12.7 | 137.8 | 47.6 | 9.4 | 46.4 | 19.5 | 6.6 | 12.9 | 11.2 | 15.6 | 169.4 | 58.7 | 11.6 | 57.0 | 24.9 | 8.1 | 15.9 | 13.8 | 19.2 | 208.2 | 12.2 | 37.9 | 69.6 | 108.4 | | | | | | | | | | |
| 8 | 35.4 | 7.3 | 31.8 | 14.2 | 4.1 | 10.3 | 7.9 | 11.4 | 122.4 | 39.8 | 8.2 | 35.7 | 15.9 | 4.6 | 11.6 | 8.8 | 12.8 | 137.4 | 48.9 | 10.1 | 43.9 | 19.6 | 5.6 | 14.3 | 10.9 | 15.7 | 168.9 | 60.0 | 12.4 | 54.0 | 24.1 | 6.9 | 17.5 | 13.4 | 19.3 | 207.7 | 73.9 | 15.2 | 66.4 | 29.6 | 8.5 | 21.6 | 16.4 | 23.8 | 255.4 | 15.0 | 46.5 | 85.3 | 133.0 | | | | | | | | | | |
| 9 | 21.9 | 4.8 | 20.3 | 8.4 | 2.9 | 5.9 | 5.4 | 6.1 | 75.6 | 24.6 | 5.3 | 22.7 | 9.5 | 3.2 | 6.7 | 6.1 | 6.8 | 84.9 | 30.3 | 6.6 | 28.0 | 11.6 | 4.0 | 8.2 | 7.4 | 8.4 | 104.4 | 37.2 | 8.1 | 34.4 | 14.3 | 4.9 | 10.1 | 9.2 | 10.3 | 128.4 | 45.8 | 9.9 | 42.3 | 17.6 | 6.0 | 12.4 | 11.3 | 12.7 | 157.8 | 9.3 | 28.8 | 52.7 | 82.2 | | | | | | | | | | |
| 10 | 24.4 | 4.9 | 23.3 | 11.1 | 3.4 | 7.0 | 5.9 | 7.5 | 87.6 | 27.4 | 5.5 | 26.1 | 12.5 | 3.9 | 7.9 | 6.6 | 8.4 | 98.3 | 33.7 | 6.8 | 32.1 | 15.4 | 4.7 | 9.7 | 8.1 | 10.3 | 120.9 | 41.3 | 8.4 | 39.6 | 18.9 | 5.8 | 12.0 | 10.0 | 12.7 | 148.6 | 50.9 | 10.3 | 48.6 | 23.2 | 7.2 | 14.7 | 12.2 | 15.6 | 182.7 | 10.7 | 33.3 | 61.1 | 95.1 | | | | | | | | | | |
| 11 | 59.1 | 10.9 | 58.8 | 28.7 | 7.6 | 17.1 | 11.9 | 16.5 | 208.6 | 66.4 | 12.2 | 66.1 | 30.0 | 8.6 | 19.2 | 13.3 | 18.5 | 234.4 | 81.8 | 15.1 | 81.4 | 37.0 | 10.6 | 23.6 | 18.4 | 22.8 | 288.6 | 100.5 | 18.5 | 100.3 | 45.6 | 13.0 | 28.1 | 20.3 | 28.1 | 355.3 | 123.9 | 22.8 | 123.3 | 58.0 | 16.0 | 35.8 | 24.9 | 34.6 | 437.3 | 25.8 | 80.1 | 146.8 | 228.8 | | | | | | | | | | |
| 12 | 36.5 | 7.2 | 35.5 | 17.5 | 4.9 | 11.2 | 8.1 | 10.1 | 131.0 | 41.0 | 8.0 | 39.9 | 19.7 | 5.5 | 12.6 | 9.1 | 11.3 | 147.2 | 50.5 | 9.9 | 49.2 | 24.2 | 6.7 | 15.5 | 11.2 | 13.9 | 181.3 | 62.1 | 12.2 | 60.6 | 29.9 | 8.3 | 19.2 | 13.8 | 17.2 | 223.2 | 76.6 | 15.0 | 74.5 | 36.7 | 10.2 | 23.6 | 17.0 | 21.1 | 274.7 | 16.2 | 50.3 | 92.2 | 143.7 | | | | | | | | | | |
| 13 | 28.5 | 6.0 | 26.9 | 12.0 | 4.0 | 7.8 | 6.9 | 8.7 | 100.7 | 32.0 | 6.7 | 30.2 | 13.4 | 4.4 | 8.8 | 7.8 | 9.7 | 113.1 | 39.4 | 8.3 | 37.2 | 16.6 | 5.5 | 10.8 | 9.6 | 12.0 | 139.3 | 48.4 | 10.2 | 45.8 | 20.4 | 6.7 | 13.3 | 11.8 | 14.7 | 171.5 | 59.7 | 12.6 | 56.3 | 25.1 | 8.3 | 16.4 | 14.6 | 18.1 | 211.1 | 12.5 | 38.6 | 70.8 | 110.4 | | | | | | | | | | |
| 14 | 14.6 | 3.1 | 13.9 | 7.3 | 2.2 | 4.7 | 3.7 | 4.4 | 53.7 | 16.4 | 3.5 | 15.6 | 8.2 | 2.5 | 5.2 | 4.1 | 5.0 | 60.4 | 20.1 | 4.3 | 19.2 | 10.1 | 3.1 | 6.4 | 5.1 | 6.1 | 74.4 | 24.7 | 5.3 | 23.6 | 12.4 | 3.8 | 7.9 | 6.3 | 7.5 | 91.6 | 30.5 | 6.5 | 29.1 | 15.3 | 4.7 | 9.8 | 7.7 | 9.3 | 112.7 | 6.7 | 20.6 | 37.8 | 58.9 | | | | | | | | | | |
| 15 | 99.1 | 20.1 | 93.5 | 41.4 | 13.1 | 26.4 | 23.2 | 31.7 | 348.6 | 110.0 | 22.3 | 103.8 | 46.0 | 14.6 | 29.3 | 25.8 | 35.2 | 387.0 | 133.5 | 27.1 | 126.1 | 55.8 | 17.7 | 36.6 | 31.3 | 42.7 | 469.9 | 162.0 | 32.9 | 153.4 | 67.9 | 21.5 | 43.3 | 38.1 | 51.9 | 571.2 | 197.5 | 40.0 | 196.4 | 82.6 | 26.2 | 52.7 | 46.3 | 63.1 | 694.9 | 38.3 | 121.2 | 222.5 | 346.2 | | | | | | | | | | |
| 16 | 37.1 | 7.5 | 35.0 | 15.5 | 5.0 | 10.4 | 9.0 | 11.4 | 130.9 | 41.2 | 8.4 | 38.8 | 17.2 | 5.5 | 11.6 | 10.0 | 12.7 | 145.3 | 50.0 | 10.2 | 47.2 | 20.9 | 6.7 | 14.0 | 12.1 | 15.4 | 176.4 | 60.7 | 12.4 | 57.4 | 25.4 | 8.2 | 17.1 | 14.8 | 18.7 | 214.4 | 73.9 | 15.0 | 69.7 | 30.9 | 9.9 | 20.8 | 17.9 | 22.7 | 260.9 | 14.4 | 45.5 | 83.5 | 130.0 | | | | | | | | | | |
| 17 | 39.3 | 8.1 | 35.6 | 15.5 | 5.1 | 10.2 | 9.4 | 12.0 | 135.2 | 43.6 | 9.0 | 39.6 | 17.2 | 5.6 | 11.4 | 10.5 | 13.3 | 150.1 | 50.7 | 10.4 | 46.0 | 20.0 | 6.5 | 13.2 | 12.2 | 15.4 | 174.4 | 58.9 | 12.1 | 53.6 | 23.4 | 7.6 | 15.4 | 14.2 | 18.0 | 203.3 | 69.0 | 14.2 | 62.6 | 27.3 | 8.9 | 18.0 | 16.6 | 21.0 | 237.6 | 14.9 | 39.2 | 68.1 | 102.3 | | | | | | | | | | |
| Inner Study Area Total | 624.5 | 123.1 | 593.3 | 251.7 | 89.3 | 173.7 | 140.2 | 186.1 | 2114.9 | 699.9 | 133.0 | 664.6 | 292.7 | 92.8 | 194.6 | 157.0 | 209.5 | 2144.8 | 659.7 | 168.9 | 814.0 | 353.4 | 118.6 | 253.8 | 192.6 | 255.2 | 2597.2 | 1047.2 | 205.9 | 997.7 | 459.6 | 160.6 | 292.2 | 253.6 | 312.8 | 3070.5 | 1135.0 | 258.2 | 1224.5 | 597.8 | 170.5 | 357.6 | 283.1 | 352.6 | 4456.6 | 263.6 | 612.8 | 1435.6 | 2811.8 | | | | | | | | | | |
| 15 | 190.2 | 38.3 | 147.3 | 74.0 | 21.4 | 68.3 | 42.3 | 74.4 | 654.7 | 211.7 | 42.7 | 164.0 | 82.3 | 23.8 | 74.4 | 47.1 | 62.9 | 728.8 | 250.4 | 51.7 | 198.6 | 99.7 | 28.9 | 60.2 | 57.0 | 100.4 | 822.8 | 309.3 | 62.5 | 240.1 | 120.6 | 34.9 | 109.0 | 68.9 | 121.4 | 1,066.6 | 373.5 | 75.3 | 289.3 | 145.2 | 42.1 | 131.3 | 83.0 | 146.2 | 1,285.8 | 74.1 | 228.1 | 411.9 | 631.1 | | | | | | | | | | |
| 16 | 48.3 | 11.0 | 42.7 | 29.6 | 5.9 | 21.9 | 20.9 | 14.3 | 185.6 | 53.3 | 12.2 | 47.1 | 32.6 | 6.5 | 24.2 | 13.3 | 15.8 | 204.9 | 64.2 | 14.6 | 56.7 | 39.3 | 7.8 | 29.1 | 16.0 | 19.0 | 246.8 | 77.1 | 17.6 | 68.3 | 47.4 | 9.4 | 35.1 | 19.2 | 22.9 | 297.0 | 92.9 | 21.2 | 82.1 | 56.9 | 11.3 | 42.2 | 23.1 | 27.6 | 357.4 | 19.3 | 61.2 | 111.4 | 171.7 | | | | | | | | | | |
| 17 | 90.8 | 17.7 | 84.3 | 46.6 | 12.5 | 31.9 | 20.9 | 25.6 | 330.4 | 102.5 | 20.0 | 95.1 | 52.6 | 14.1 | 36.0 | 23.6 | 28.9 | 372.8 | 126.1 | 24.6 | 117.1 | 64.8 | 17.3 | 44.3 | 29.1 | 35.6 | 459.0 | 153.7 | 30.1 | 143.1 | 79.1 | 21.2 | 54.2 | 35.5 | 43.5 | 560.4 | 187.3 | 36.6 | 173.9 | 96.2 | 25.7 | 65.8 | 43.2 | 52.9 | 681.6 | 42.4 | 128.6 | 230.0 | 351.2 | | | | | | | | | | |
| 20 | 181.2 | 34.1 | 133.2 | 59.9 | 20.6 | 61.4 | 36.1 | 69.0 | 595.5 | 203.1 | 38.2 | 149.4 | 67.2 | 23.1 | 68.9 | 40.5 | 77.4 | 667.7 | 236.0 | 44.4 | 173.6 | 78.0 | 26.8 | 80.1 | 47.1 | 89.9 | 775.9 | 274.6 | 51.8 | 202.5 | 91.0 | 31.3 | 93.4 | 54.9 | 104.9 | 904.3 | 321.5 | 60.5 | 236.4 | 106.3 | 36.5 | 109.0 | 64.1 | 122.4 | 1,056.6 | 72.2 | 180.4 | 308.8 | 461.3 | | | | | | | | | | |
| 22 | 58.0 | 12.1 | 49.5 | 24.9 | 8.6 | 16.4 | 11.5 | 14.0 | 193.1 | 64.9 | 13.6 | 55.3 | 27.9 | 7.4 | 18.3 | 12.9 | 15.7 | 216.0 | 75.4 | 15.8 | 64.3 | 32.4 | 8.6 | 21.3 | 14.9 | 18.9 | 251.1 | 87.8 | 18.4 | 75.0 | 37.8 | 10.0 | 24.9 | 17.4 | 21.3 | 292.6 | 102.7 | 21.5 | 87.6 | 44.2 | 11.6 | 29.0 | 20.4 | 24.9 | 341.9 | 22.9 | 68.0 | 99.5 | 148.8 | | | | | | | | | | |
| Total | 1,192.9 | 236.4 | 1,050.2 | 496.2 | 149.7 | 372.2 | 283.0 | 383.6 | 4,144.3 | 1,335.2 | 264.6 | 1,175.7 | 555.3 | 167.6 | 416.5 | 294.4 | 429.2 | 4,638.5 | 1,614.9 | 320.0 | 1,424.4 | 672.7 | 203.0 | 503.4 | 356.3 | 518.4 | 5,612.9 | 1,949.7 | 387.3 | 1,726.7 | 815.2 | 246.0 | 608.7 | 431.4 | 626.8 | 6,791.5 | 2,362.9 | 468.2 | 2,090.8 | 986.6 | 297.7 | 735.2 | 521.9 | 756.6 | 8,219.8 | 494.3 | 1,468.6 | 2,647.2 | 4,075.5 | | | | | | | | | | |

Notes:
a. Zones based on the post code sectors shown on the plan at Appendix A
b. Per capita expenditure derived from Experian MMG3 data (2017 report)
c. Population derived from Experian MMG3 data (2017 report)
d. Per capita expenditure projected forward using forecast growth rates taken from Tables 1a and 1b of Experian Retail Planner Briefing Note 15
e. Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Figure 5 of Appendix 3 of Experian Retail Planner Briefing Note 15
2018 Prices

South West Hertfordshire Retail & Leisure Study
Nexus Planning

Table 17: Chemist goods shopping patterns

Table with 24 columns: Destination, Total Chemist, 20 zones (Zone 1 to Zone 20), Inner Study Area, and 5 zones (Zone 15 to Zone 22). Rows include various study areas like Watford District, Hemel Hempstead, and Aylesbury. Data is presented as percentages for each zone.

Notes:
a. Zones based on post code sectors
b. Market share for 'near' and 'far' shopping derived directly from NBS Household Survey (December 2016)
c. Excludes 'non-routine' markets and internet sales

South West Hertfordshire Retail & Leisure Study
 Nexus Planning

Table 23: Furniture goods shopping patterns

| Destination | Watford DC | | Hemel Hempstead DC | | | | Stevenage DC | | | | Dunstable DC | | | | St Albans DC | | | | Inver Study Area | Zone 15 | | | | | Zone 22 | | | | |
|---|---------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|------------------|-----------------------|-----------------------|-----------------------|-----------------------|---------------|---------------|---------------|---------------|---------------|--|
| | Total Furniture (%) | Zone 1 Furniture (%) | Zone 2 Furniture (%) | Zone 3 Furniture (%) | Zone 4 Furniture (%) | Zone 5 Furniture (%) | Zone 6 Furniture (%) | Zone 7 Furniture (%) | Zone 8 Furniture (%) | Zone 9 Furniture (%) | Zone 10 Furniture (%) | Zone 11 Furniture (%) | Zone 12 Furniture (%) | Zone 13 Furniture (%) | Zone 14 Furniture (%) | Zone 15 Furniture (%) | Zone 16 Furniture (%) | Zone 17 Furniture (%) | | Zone 18 Furniture (%) | Zone 19 Furniture (%) | Zone 20 Furniture (%) | Zone 21 Furniture (%) | Furniture (%) | Furniture (%) | Furniture (%) | Furniture (%) | Furniture (%) | |
| Zone 1 Watford South | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Cole Valley Retail Park, Lower High Street, Watford | 2.7% | 2.4% | 1.4% | 12.4% | 1.6% | 1.3% | 0.0% | 1.5% | 0.6% | 5.8% | 0.0% | 4.4% | 0.0% | 1.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | |
| Waterfields Shopping Park, Waterfields Way, Watford | 1.1% | 8.1% | 7.2% | 2.0% | 2.4% | 0.0% | 0.0% | 5.9% | 0.0% | 0.0% | 1.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Watford Arches Retail Park, Lower High Street, Watford | 8.4% | 15.6% | 32.3% | 23.5% | 20.7% | 0.0% | 0.0% | 30.3% | 20.2% | 0.0% | 22.4% | 22.1% | 16.0% | 0.0% | 2.6% | 2.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Watford Town Centre | 17.9% | 64.6% | 38.3% | 42.1% | 37.1% | 24.5% | 20.6% | 22.7% | 53.4% | 40.6% | 32.7% | 10.4% | 13.7% | 10.8% | 9.3% | 16.2% | 1.5% | 2.7% | | | | | | | | | | | |
| Others, Zone 1 | 0.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Sub-total | 30.5% | 92.8% | 79.3% | 80.1% | 62.6% | 41.9% | 22.5% | 59.5% | 87.6% | 61.9% | 56.9% | 37.6% | 25.4% | 17.9% | 11.9% | 25.4% | 1.5% | 5.3% | | | | | | | | | | | |
| Zone 2 Watford North | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Asia, Odhams Industrial Estate, St Albans Road, Watford | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Garrison Village Centre | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Others, Zone 2 | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Sub-total | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Zone 3 Busley & Aldenham | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Aldenham Village Centre | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Busley Town Centre | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Coston, Harspring Lane, Busley | 0.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Others, Zone 3 | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Sub-total | 0.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Zone 4 Busley & Shenley | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Radlett Town Centre | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Shenley Village Centre | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Sub-total | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Zone 5 Borehamwood & Elstree | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Borehamwood Town Centre | 1.6% | 0.0% | 0.0% | 1.0% | 6.6% | 3.0% | 1.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Slingsby Retail Park, Slingsby Way, Borehamwood | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Tesco Extra, Chesham Road, Borehamwood | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Others, Zone 5 | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Sub-total | 2.3% | 0.0% | 0.0% | 1.0% | 6.6% | 3.0% | 1.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Zone 6 Potters Bar | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Potters Bar Town Centre | 1.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 22.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 11.2% | 0.0% | | | | | | | | | |
| South Mimms Village Centre | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Tesco Superstore, Milton Lane, Potters Bar | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Others, Zone 6 | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Sub-total | 1.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 22.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 11.2% | 0.0% | | | | | | | | | |
| Zone 7 Rickmansworth | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Croley Green Local Centre | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Rickmansworth Town Centre | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Others, Zone 7 | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Sub-total | 0.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Zone 8 Rickmansworth North & South | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Northwood Local Centre | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| South Oxley Local Centre | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Sub-total | 0.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Zone 9 Chesham & Ewelham | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Chesham Village Centre | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Ewelham Village Centre | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Stannett Village Centre | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Sub-total | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Zone 10 Knees Langley & Abbots Langley | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Abbots Langley Village Centre | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.4% | 0.0% | 0.0% | 0.0% | 3.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Knees Langley Village Centre | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Others, Zone 10 | 0.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Sub-total | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.4% | 0.0% | 0.0% | 0.0% | 3.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Zone 11 Hemel Hempstead | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Hemel Hempstead Town Centre | 1.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 4.6% | 9.1% | 12.8% | 10.8% | 1.1% | 1.9% | 1.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Aspley Mills Retail Park, London Road, Hemel Hempstead | 3.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 14.8% | 22.1% | 18.2% | 4.0% | 4.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Others, Zone 11 | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Sub-total | 4.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 4.6% | 24.0% | 35.1% | 29.0% | 5.0% | 5.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Zone 12 Hemel Hempstead North | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Growthill Local Centre | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Others, Zone 12 | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.5% | 1.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Sub-total | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 3.0% | 1.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | | | | |
| Zone 13 Berkhamstead | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Table 26a: Estimated 'capacity' for new comparison goods facilities in South West Hertfordshire (all five authority areas)

| Year | Turnover (£m) ¹ | Available Expenditure (£m) ² | Inflow (£m) | Surplus Expenditure (£m) |
|-----------------------------|-------------------------------|--|----------------|-----------------------------|
| 2017 | 2,154.7 | 2,121.3 | 33.4 | 0.0 |
| 2021 | 2,293.6 | 2,307.1 | 36.7 | 50.1 |
| 2026 | 2,564.8 | 2,791.7 | 42.9 | 269.8 |
| 2031 | 2,859.6 | 3,377.9 | 50.3 | 568.6 |
| 2036 | 3,188.3 | 4,088.3 | 58.8 | 958.8 |
| Study Area Market Share (%) | | 49.7% | | |

- Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15 (December 2017)
- Assumes reduced market share claimed by South West Hertfordshire facilities at 49.7% from the Study Area (currently 51.2%)

Table 26b: Gross quantitative capacity for additional comparison goods floorspace in South West Hertfordshire

| Year | Surplus Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|-----------------------------|--------------------------------|------------------|
| | | Min ¹ | Max ² |
| 2017 | 0.0 | 0 | 0 |
| 2021 | 50.1 | 6,300 | 8,600 |
| 2026 | 269.8 | 30,200 | 41,300 |
| 2031 | 568.6 | 57,100 | 78,000 |
| 2036 | 958.8 | 86,400 | 117,900 |

- Average sales density assumed to be £7,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved in South West Hertfordshire
- Average sales density assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved in South West Hertfordshire
- Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15 (December 2017)

2016 Prices

Table 26c: Extant comparison goods commitments in South West Hertfordshire

| Destination | Reference | Proposal | Net Convenience Floorspace (sq m) | Estimated Sales Density (£/sq m) | Estimated Comparison Turnover (£m) |
|--------------|--|--|--|-------------------------------------|---------------------------------------|
| Hertsmere | N/A | Over 40 applications involving development to or from A classes have extant permission. However, none are sizable and most relate to changes of use of small High Street units. The extant permissions are judged largely to be neutral in floorspace terms. | 0 | 0 | 0.0 |
| Three Rivers | 16/0005/FUL, South Oxhey regeneration | The approved Development Schedule sets out the type and maximum quantity of development that can be provided across the South Oxhey redevelopment as a whole. This permits up to 5,137 sqm of flexible town centre uses (Classes A1-A5, D1, D2, B1 and Bookmakers) including a Lidl foodstore of up to 1,714 sqm. After allowing for a foodstore, offices and a bookmakers, there is 2,647 sq m of space left for potential comparison goods uses. | Assumed that comparison goods might be 75% of the 2,647 sq m residual figure = 1,985 sq m. We have assumed that 50% of this figure is 'new' floorspace (i.e. not replacement) = 992 sq m. | 6,500 | 6.4 |
| Dacorum | 4/00424/15/MOA, Jarman Park, St Albans Hill, Hemel Hempstead | The proposed development involves the erection of Class A1 retail development (to include convenience and comparison retail floorspace and ancillary cafe) and Class A3 drive thru cafe/restaurant (with ancillarytakeaway) unit together with access, car parking, service yard and associated works. | Net convenience floorspace is 812 sq m net. Net comparison floorspace is 8,000 sq m net. | 6,500 | 52.0 |
| Dacorum | 4/01317/14/MFA, Gossoms End, Berkhamstead | Full Planning permission (4/01317/14/MFA) has been granted for a 1,884 sq m gross Lidl store and 30 flats. The development has not been implemented, but a number of applications to discharge the planning conditions have been submitted recently, which suggests that a start on site is imminent. | Net floorspace is 1,281 sq m net x 20% comparison goods area = 256 sq m | 4,800 | 1.2 |
| Dacorum | 4/03157/16/MFA, Aviva site, Maylands Avenue, Hemel Hempstead | Outline planning permission (4/01132/15/MOA) has been granted for retail development (12,503 sq. metres), offices (3,004 sq. metres) and restaurants (650 sqm) at this site. The conditions attached to this permission stipulate that the net retail floor area shall not exceed 9,290 sq. metres, comprising a maximum of: • 1,414 sq. metres of convenience food goods • 7,848 sq. metres of comparison non-food goods The Council has now granted a reserved matters application (4/03157/16/MFA). This application proposes an increase in net convenience floorspace to 1,950 sqm. | We have assumed that the net to gross ratio for comparison goods is 75% = 5,613 sq m net | 6,500 | 36.5 |
| Watford | 16/00076/VAR, Charter Place, Watford | Part demolition/reconfiguration/change of use of existing Charter Place Shopping Centre, demolition of 37-57 and 67-69 High Street, and part retention of 63-65, High Street. Erection of new buildings within Classes A1(shops), A3 (restaurants) and D2 (including cinema), including provision of new covered market, together with associated plant and machinery, and ancillary facilities. Provision of new public realm. Alterations to existing pedestrian and cycle access and egress arrangements, highway alterations/improvements and other ancillary works and operations. Variation of Condition 2 of planning permission ref. 14/00779/VAR to incorporate amendments to the ground and first floor retail units, second floor leisure unit, design of the high level glazed canopy, reorientation of the escalators and stairs within the central space and other minor amendments. | Gross floorspace additions of 10,291 sq m. We have assumed that the net:gross ratio is 70% = 7,204 sq m net. We have further assumed that 80% of this total will be dedicated to convenience goods = 5,763 sq m net. | 7,500 | 43.2 |
| St Albans | 5/2016/3386, Griffiths Way South | Outline application (access and scale sought) for mixed use development comprising Class A1 (discount foodstore), Class A1 (non food retail), D2 (gym) and Class A3/A5 (restaurant and drive-through) | 4,800 | 6,500 | 31.2 |
| St Albans | 5/2016/3629, Hertfordshire House Civic Close St Albans | Infill of building overhang at ground floor and partial change of use of basement and ground floor to flexible commercial use (A1/A2/A3/B1/D1). | 218 | 6,500 | 1.4 |
| St Albans | 5/2015/2212, Town Hall, St Albans | Change of use of building to accommodate new museum and gallery with ancillary cafe and retail facilities including extension of basement, first floor glazed link extensions, display of advertisement banners and lettering, replac | 200 | 6,500 | 1.3 |
| Total | | | 25,842 | | 173.3 |

Table 26d: Net quantitative capacity for additional comparison goods floorspace in South West Hertfordshire

| Year | Surplus Expenditure (£m) | Commitments (£m) | Residual Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|-----------------------------|---------------------|------------------------------|--------------------------------|------------------|
| | | | | Min ¹ | Max ² |
| 2017 | 0.0 | 173.3 | -173.3 | -23,100 | -31,500 |
| 2021 | 50.1 | 184.5 | -134.3 | -16,800 | -23,000 |
| 2026 | 269.8 | 206.1 | 63.8 | 7,100 | 9,800 |
| 2031 | 568.6 | 229.8 | 338.8 | 34,000 | 46,500 |
| 2036 | 958.8 | 256.2 | 702.6 | 63,300 | 86,400 |

- Average sales density assumed to be £7,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved in South West Hertfordshire
- Average sales density assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved in South West Hertfordshire
- Residual calculated by subtracting turnover of commitments (sourced from Table 26c) from surplus expenditure (sourced from Table 26a)
- Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15 (December 2017)

2016 Prices

Table 26e: Estimated 'capacity' for new comparison goods facilities in Hertsmere

| Year | Turnover (£m) ¹ | Available Expenditure (£m) ² | Inflow (£m) | Surplus Expenditure (£m) |
|-----------------------------|-------------------------------|--|----------------|-----------------------------|
| 2017 | 147.0 | 147.0 | 0.0 | 0.0 |
| 2021 | 156.5 | 144.8 | 0.0 | -11.7 |
| 2026 | 175.0 | 175.2 | 0.0 | 0.2 |
| 2031 | 195.1 | 212.0 | 0.0 | 16.9 |
| 2036 | 217.5 | 256.6 | 0.0 | 39.1 |
| Study Area Market Share (%) | | 3.1% | | |

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15 (December 2017)
2. Assumes reduced market share claimed by Hertsmere facilities at 3.1% from the Study Area (currently 3.5%)

Table 26f: Gross quantitative capacity for additional comparison goods floorspace in Hertsmere

| Year | Surplus Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|-----------------------------|--------------------------------|------------------|
| | | Min ¹ | Max ² |
| 2017 | 0.0 | 0 | 0 |
| 2021 | -11.7 | -1,500 | -2,000 |
| 2026 | 0.2 | 0 | 0 |
| 2031 | 16.9 | 1,700 | 2,300 |
| 2036 | 39.1 | 3,500 | 4,800 |

1. Average sales density assumed to be £7,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved in South West Hertfordshire
2. Average sales density assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved in South West Hertfordshire
3. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15 (December 2017)

2016 Prices

Table 26g: Extant comparison goods commitments in Hertsmere

| Destination | Reference | Proposal | Net Convenience Floorspace (sq m) | Estimated Sales Density (£/sq m) | Estimated Comparison Turnover (£m) |
|-------------|-----------|--|--------------------------------------|-------------------------------------|---------------------------------------|
| Hertsmere | N/A | Over 40 applications involving development to or from A classes have extant permission. However, none are sizable and most relate to changes of use of small High Street units. The extant permissions are judged largely to be neutral in floorspace terms. | 0 | 0 | 0.0 |
| Total | | | 0 | | 0.0 |

Table 26h: Net quantitative capacity for additional comparison goods floorspace in Hertsmere

| Year | Surplus Expenditure (£m) | Commitments (£m) | Residual Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|-----------------------------|---------------------|------------------------------|--------------------------------|------------------|
| | | | | Min ¹ | Max ² |
| 2017 | 0.0 | 0.0 | 0.0 | 0 | 0 |
| 2021 | -11.7 | 0.0 | -11.7 | -1,500 | -2,000 |
| 2026 | 0.2 | 0.0 | 0.2 | 0 | 0 |
| 2031 | 16.9 | 0.0 | 16.9 | 1,700 | 2,300 |
| 2036 | 39.1 | 0.0 | 39.1 | 3,500 | 4,800 |

1. Average sales density assumed to be £7,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved in South West Hertfordshire
2. Average sales density assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved in South West Hertfordshire
3. Residual calculated by subtracting turnover of commitments (sourced from Table 26g) from surplus expenditure (sourced from Table 26e)
4. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15 (December 2017)

2016 Prices

Table 26i: Estimated 'capacity' for new comparison goods facilities in Three Rivers

| Year | Turnover (£m) ¹ | Available Expenditure (£m) ² | Inflow (£m) | Surplus Expenditure (£m) |
|-----------------------------|-------------------------------|--|----------------|-----------------------------|
| 2017 | 54.3 | 54.3 | 0.0 | 0.0 |
| 2021 | 57.8 | 60.8 | 0.0 | 3.0 |
| 2026 | 64.6 | 73.6 | 0.0 | 8.9 |
| 2031 | 72.1 | 89.0 | 0.0 | 16.9 |
| 2036 | 80.4 | 107.7 | 0.0 | 27.4 |
| Study Area Market Share (%) | | 1.3% | | |

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15 (December 2017)
2. Assumes constant market share claimed by Three Rivers facilities at 1.3% from the Study Area

Table 26j: Gross quantitative capacity for additional comparison goods floorspace in Three Rivers

| Year | Surplus Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|-----------------------------|--------------------------------|------------------|
| | | Min ¹ | Max ² |
| 2017 | 0.0 | 0 | 0 |
| 2021 | 3.0 | 400 | 500 |
| 2026 | 8.9 | 1,000 | 1,400 |
| 2031 | 16.9 | 1,700 | 2,300 |
| 2036 | 27.4 | 2,500 | 3,400 |

1. Average sales density assumed to be £7,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved in South West Hertfordshire
2. Average sales density assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved in South West Hertfordshire
3. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15 (December 2017)

2016 Prices

Table 26k: Extant comparison goods commitments in Three Rivers

| Destination | Reference | Proposal | Net Convenience Floorspace (sq m) | Estimated Sales Density (£/sq m) | Estimated Comparison Turnover (£m) |
|--------------|---------------------------------------|--|---|-------------------------------------|---------------------------------------|
| Three Rivers | 16/0005/FUL, South Oxhey regeneration | The approved Development Schedule sets out the type and maximum quantity of development that can be provided across the South Oxhey redevelopment as a whole. This permits up to 5,137 sqm of flexible town centre uses (Classes A1-A5, D1, D2, B1 and Bookmakers) including a Lidl foodstore of up to 1,714 sqm. After allowing for a foodstore, offices and a bookmakers, there is 2,647 sq m of space left for potential comparison goods uses. | Assumed that comparison goods might be 75% of the 2,647 sq m residual figure = 1,985 sq m. We have assumed that 50% of this figure is 'new' floorspace (i.e. not replacement) = 992 sq m. | 6,500 | 6.4 |
| Total | | | 992 | | 6.4 |

Table 26l: Net quantitative capacity for additional comparison goods floorspace in Three Rivers

| Year | Surplus Expenditure (£m) | Commitments (£m) | Residual Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|-----------------------------|---------------------|------------------------------|--------------------------------|------------------|
| | | | | Min ¹ | Max ² |
| 2017 | 0.0 | 6.4 | -6.4 | -900 | -1,200 |
| 2021 | 3.0 | 6.9 | -3.9 | -500 | -700 |
| 2026 | 8.9 | 7.7 | 1.2 | 100 | 200 |
| 2031 | 16.9 | 8.6 | 8.4 | 800 | 1,100 |
| 2036 | 27.4 | 9.5 | 17.8 | 1,600 | 2,200 |

1. Average sales density assumed to be £7,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved in South West Hertfordshire
2. Average sales density assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved in South West Hertfordshire
3. Residual calculated by subtracting turnover of commitments (sourced from Table 26k) from surplus expenditure (sourced from Table 26i)
4. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15 (December 2017)

2016 Prices

Table 26m: Estimated 'capacity' for new comparison goods facilities in Dacorum

| Year | Turnover (£m) ¹ | Available Expenditure (£m) ² | Inflow (£m) | Surplus Expenditure (£m) |
|-----------------------------|-------------------------------|--|----------------|-----------------------------|
| 2017 | 436.4 | 436.4 | 0.0 | 0.0 |
| 2021 | 464.6 | 488.5 | 0.0 | 23.9 |
| 2026 | 519.5 | 591.1 | 0.0 | 71.6 |
| 2031 | 579.2 | 715.2 | 0.0 | 136.0 |
| 2036 | 645.8 | 865.6 | 0.0 | 219.8 |
| Study Area Market Share (%) | | 10.5% | | |

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15 (December 2017)
2. Assumes constant market share claimed by Dacorum facilities at 10.5% from the Study Area

Table 26n: Gross quantitative capacity for additional comparison goods floorspace in Dacorum

| Year | Surplus Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|-----------------------------|--------------------------------|------------------|
| | | Min ¹ | Max ² |
| 2017 | 0.0 | 0 | 0 |
| 2021 | 23.9 | 3,000 | 4,100 |
| 2026 | 71.6 | 8,000 | 10,900 |
| 2031 | 136.0 | 13,700 | 18,700 |
| 2036 | 219.8 | 19,800 | 27,000 |

1. Average sales density assumed to be £7,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved in South West Hertfordshire
2. Average sales density assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved in South West Hertfordshire
3. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15 (December 2017)
2016 Prices

Table 26o: Extant comparison goods commitments in Dacorum

| Destination | Reference | Proposal | Net Convenience Floorspace (sq m) | Estimated Sales Density (£/sq m) | Estimated Comparison Turnover (£m) |
|--------------|--|---|--|-------------------------------------|---------------------------------------|
| Dacorum | 4/00424/15/MOA, Jarman Park, St Albans Hill, Hemel Hempstead | The proposed development involves the erection of Class A1 retail development (to include convenience and comparison retail floorspace and ancillary cafe) and Class A3 drive thru café/restaurant (with ancillarytakeaway) unit together with access, car parking, service yard and associated works. | Net convenience floorspace is 812 sq m net. Net comparison floorspace is 8,000 sq m net. | 6,500 | 52.0 |
| Dacorum | 4/01317/14/MFA, Gossoms End, Berkhamstead | Full Planning permission (4/01317/14/MFA) has been granted for a 1,884 sq m gross Lidl store and 30 flats. The development has not been implemented, but a number of applications to discharge the planning conditions have been submitted recently, which suggests that a start on site is imminent. | Net floorspace is 1,281 sq m net x 20% comparison goods area = 256 sq m | 4,800 | 1.2 |
| Dacorum | 4/03157/16/MFA, Aviva site, Maylands Avenue, Hemel Hempstead | Outline planning permission (4/01132/15/MOA) has been granted for retail development (12,503 sq. metres), offices (3,004 sq. metres) and restaurants (650 sqm) at this site. The conditions attached to this permission stipulate that the net retail floor area shall not exceed 9,290 sq. metres, comprising a maximum of: • 1,414 sq. metres of convenience food goods • 7,848 sq. metres of comparison non-food goods The Council has now granted a reserved matters application (4/03157/16/MFA). This application proposes an increase in net convenience floorspace to 1,950 sqm. | We have assumed that the net to gross ratio for comparison goods is 75% = 5,613 sq m net | 6,500 | 36.5 |
| Total | | | 13,869 | | 89.7 |

Table 26p: Net quantitative capacity for additional comparison goods floorspace in Dacorum

| Year | Surplus Expenditure (£m) | Commitments (£m) | Residual Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|-----------------------------|---------------------|------------------------------|--------------------------------|------------------|
| | | | | Min ¹ | Max ² |
| 2017 | 0.0 | 89.7 | -89.7 | -12,000 | -16,300 |
| 2021 | 23.9 | 95.5 | -71.6 | -9,000 | -12,200 |
| 2026 | 71.6 | 106.8 | -35.2 | -3,900 | -5,400 |
| 2031 | 136.0 | 119.1 | 17.0 | 1,700 | 2,300 |
| 2036 | 219.8 | 132.7 | 87.1 | 7,800 | 10,700 |

1. Average sales density assumed to be £7,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved in South West Hertfordshire
2. Average sales density assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved in South West Hertfordshire
3. Residual calculated by subtracting turnover of commitments (sourced from Table 26o) from surplus expenditure (sourced from Table 26m)
4. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15 (December 2017)
2016 Prices

Table 26q: Estimated 'capacity' for new comparison goods facilities in Watford

| Year | Turnover (£m) ¹ | Available Expenditure (£m) ² | Inflow (£m) | Surplus Expenditure (£m) |
|-----------------------------|-------------------------------|--|----------------|-----------------------------|
| 2017 | 1,089.5 | 1,067.6 | 21.8 | 0.0 |
| 2021 | 1,159.7 | 1,195.0 | 24.0 | 59.2 |
| 2026 | 1,296.8 | 1,446.0 | 28.1 | 177.2 |
| 2031 | 1,445.9 | 1,749.6 | 32.8 | 336.6 |
| 2036 | 1,612.1 | 2,117.5 | 38.4 | 543.9 |
| Study Area Market Share (%) | | 25.8% | | |

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15 (December 2017)
2. Assumes constant market share claimed by Watford facilities at 25.8% from the Study Area

Table 26r: Gross quantitative capacity for additional comparison goods floorspace in Watford

| Year | Surplus Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|-----------------------------|--------------------------------|------------------|
| | | Min ¹ | Max ² |
| 2017 | 0.0 | 0 | 0 |
| 2021 | 59.2 | 7,400 | 10,100 |
| 2026 | 177.2 | 19,900 | 27,100 |
| 2031 | 336.6 | 33,800 | 46,200 |
| 2036 | 543.9 | 49,000 | 66,900 |

1. Average sales density assumed to be £7,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved in South West Hertfordshire
2. Average sales density assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved in South West Hertfordshire
3. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15 (December 2017)

2016 Prices

Table 26s: Extant comparison goods commitments in Watford

| Destination | Reference | Proposal | Net Convenience Floorspace (sq m) | Estimated Sales Density (£/sq m) | Estimated Comparison Turnover (£m) |
|--------------|--------------------------------------|---|--|-------------------------------------|---------------------------------------|
| Watford | 16/00076/VAR, Charter Place, Watford | Part demolition/reconfiguration/change of use of existing Charter Place Shopping Centre, demolition of 37-57 and 67-69 High Street, and part retention of 63-65, High Street. Erection of new buildings within Classes A1(shops), A3 (restaurants) and D2 (including cinema), including provision of new covered market, together with associated plant and machinery, and ancillary facilities. Provision of new public realm. Alterations to existing pedestrian and cycle access and egress arrangements, highway alterations/ improvements and other ancillary works and operations. Variation of Condition 2 of planning permission ref. 14/00779/VAR to incorporate amendments to the ground and first floor retail units, second floor leisure unit, design of the high level glazed canopy, reorientation of the escalators and stairs within the central space and other minor amendments. | Gross floorspace additions of 10,291 sq m. We have assumed that the net-gross ratio is 70% = 7,204 sq m net. We have further assumed that 80% of this total will be dedicated to convenience goods = 5,763 sq m net. | 7,500 | 43.2 |
| Total | | | 5,763 | | 43.2 |

Table 26t: Net quantitative capacity for additional comparison goods floorspace in Watford

| Year | Surplus Expenditure (£m) | Commitments (£m) | Residual Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|-----------------------------|---------------------|------------------------------|--------------------------------|------------------|
| | | | | Min ¹ | Max ² |
| 2017 | 0.0 | 43.2 | -43.2 | -5,800 | -7,900 |
| 2021 | 59.2 | 46.0 | 13.2 | 1,700 | 2,300 |
| 2026 | 177.2 | 51.4 | 125.8 | 14,100 | 19,200 |
| 2031 | 336.6 | 57.4 | 279.2 | 28,100 | 38,300 |
| 2036 | 543.9 | 64.0 | 480.0 | 43,300 | 59,000 |

1. Average sales density assumed to be £7,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved in South West Hertfordshire
2. Average sales density assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved in South West Hertfordshire
3. Residual calculated by subtracting turnover of commitments (sourced from Table 26s) from surplus expenditure (sourced from Table 26q)
4. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15 (December 2017)

2016 Prices

Table 26u: Estimated 'capacity' for new comparison goods facilities in St Albans

| Year | Turnover (£m) ¹ | Available Expenditure (£m) ² | Inflow (£m) | Surplus Expenditure (£m) |
|-----------------------------|-------------------------------|--|----------------|-----------------------------|
| 2017 | 427.5 | 415.9 | 11.6 | 0.0 |
| 2021 | 455.1 | 418.0 | 12.7 | -24.3 |
| 2026 | 508.9 | 505.9 | 14.9 | 11.9 |
| 2031 | 567.4 | 612.1 | 17.4 | 62.1 |
| 2036 | 632.6 | 740.8 | 20.4 | 128.6 |
| Study Area Market Share (%) | | 9.0% | | |

1. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15 (December 2017)
2. Assumes reduced market share claimed by St Albans facilities at 9.0% from the Study Area (currently 10.0%)

Table 26v: Gross quantitative capacity for additional comparison goods floorspace in St Albans

| Year | Surplus Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|-----------------------------|--------------------------------|------------------|
| | | Min ¹ | Max ² |
| 2017 | 0.0 | 0 | 0 |
| 2021 | -24.3 | -3,000 | -4,200 |
| 2026 | 11.9 | 1,300 | 1,800 |
| 2031 | 62.1 | 6,200 | 8,500 |
| 2036 | 128.6 | 11,600 | 15,800 |

1. Average sales density assumed to be £7,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved in South West Hertfordshire
2. Average sales density assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved in South West Hertfordshire
3. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15 (December 2017)

2016 Prices

Table 26w: Extant comparison goods commitments in St Albans

| Destination | Reference | Proposal | Net Convenience Floorspace (sq m) | Estimated Sales Density (£/sq m) | Estimated Comparison Turnover (£m) |
|--------------|--|---|--------------------------------------|-------------------------------------|---------------------------------------|
| St Albans | 5/2016/3386, Griffiths Way South | Outline application (access and scale sought) for mixed use development comprising Class A1 (discount foodstore), Class A1 (non food retail), D2 (gym) and Class A3/A5 (restaurant and drive-through) | 4,800 | 6,500 | 31.2 |
| St Albans | 5/2016/3629, Hertfordshire House Civic Close St Albans | Infill of building overhang at ground floor and partial change of use of basement and ground floor to flexible commercial use (A1/A2/A3/B1/D1). | 218 | 6,500 | 1.4 |
| St Albans | 5/2015/2212, Town Hall, St Albans | Change of use of building to accommodate new museum and gallery with ancillary cafe and retail facilities including extension of basement, first floor glazed link extensions, display of advertisement banners and lettering, replac | 200 | 6,500 | 1.3 |
| Total | | | 5,763 | | 33.9 |

Table 26x: Net quantitative capacity for additional comparison goods floorspace in St Albans

| Year | Surplus Expenditure (£m) | Commitments (£m) | Residual Expenditure (£m) | Floorspace Capacity (sq m net) | |
|------|-----------------------------|---------------------|------------------------------|--------------------------------|------------------|
| | | | | Min ¹ | Max ² |
| 2017 | 0.0 | 33.9 | -33.9 | -4,500 | -6,200 |
| 2021 | -24.3 | 36.1 | -60.4 | -7,600 | -10,300 |
| 2026 | 11.9 | 40.4 | -28.5 | -3,200 | -4,400 |
| 2031 | 62.1 | 45.0 | 17.1 | 1,700 | 2,300 |
| 2036 | 128.6 | 50.2 | 78.4 | 7,100 | 9,600 |

1. Average sales density assumed to be £7,500 per sq.m which Nexus Planning considers to be towards the higher end of what could be achieved in South West Hertfordshire
2. Average sales density assumed to be £5,500 per sq.m which Nexus Planning considers to be towards the lower end of what could be achieved in South West Hertfordshire
3. Residual calculated by subtracting turnover of commitments (sourced from Table 26w) from surplus expenditure (sourced from Table 26u)
4. Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 15 (December 2017)

2016 Prices