

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	2017	2021	2026	2031	2036
1	63,649	67,718	72,803	77,889	82,975	2,064	2,004	1,998	1,972	1,967	1,967	1,973
2	51,994	55,317	59,472	63,626	67,780	2,063	2,003	1,997	1,970	1,966	1,965	1,971
3	20,825	22,223	23,969	25,716	27,462	2,252	2,187	2,180	2,151	2,146	2,146	2,152
4	13,439	14,341	15,468	16,595	17,723	2,409	2,339	2,332	2,301	2,296	2,295	2,302
5	40,486	43,203	46,598	49,994	53,389	2,011	1,953	1,947	1,921	1,917	1,916	1,922
6	25,405	27,110	29,240	31,371	33,502	2,214	2,150	2,144	2,115	2,110	2,110	2,116
7	27,350	28,982	31,022	33,063	35,103	2,285	2,219	2,212	2,183	2,178	2,177	2,183
8	33,601	35,607	38,113	40,620	43,126	2,324	2,257	2,250	2,220	2,215	2,214	2,221
9	16,314	17,288	18,505	19,722	20,939	2,663	2,586	2,578	2,544	2,538	2,537	2,545
10	24,080	25,517	27,314	29,110	30,906	2,288	2,222	2,215	2,186	2,180	2,180	2,186
11	67,203	72,058	78,126	84,195	90,264	2,163	2,100	2,094	2,066	2,061	2,061	2,067
12	38,306	41,073	44,532	47,992	51,451	2,306	2,239	2,232	2,203	2,197	2,197	2,203
13	25,440	27,278	29,576	31,873	34,171	2,444	2,373	2,366	2,335	2,330	2,329	2,336
14	14,691	15,753	17,079	18,406	19,733	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	95,887	100,757	106,844	112,931	119,018	2,269	2,203	2,197	2,168	2,163	2,162	2,168
19	35,284	37,076	39,316	41,556	43,795	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	34,234	35,972	38,145	40,319	42,492	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	1,241,416	1,307,966	1,387,538	1,463,911	1,537,855							

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	127.2	133.5	143.2	153.2	163.7	6.3	16.0	26.0	36.5
2	103.8	109.0	116.9	125.0	133.6	5.2	13.1	21.2	29.8
3	45.4	47.8	51.4	55.2	59.1	2.4	6.0	9.8	13.7
4	31.3	33.0	35.5	38.1	40.8	1.7	4.2	6.8	9.5
5	78.8	83.0	89.3	95.8	102.6	4.2	10.5	17.0	23.8
6	54.5	57.3	61.7	66.2	70.9	2.9	7.3	11.7	16.4
7	60.5	63.3	67.6	72.0	76.6	2.8	7.1	11.5	16.1
8	75.6	79.0	84.4	89.9	95.8	3.5	8.8	14.4	20.2
9	42.1	44.0	47.0	50.0	53.3	1.9	4.9	8.0	11.2
10	53.3	55.8	59.6	63.5	67.6	2.4	6.2	10.1	14.2
11	140.7	148.9	161.0	173.5	186.6	8.2	20.3	32.8	45.8
12	85.5	90.5	97.9	105.4	113.4	5.0	12.4	19.9	27.9
13	60.2	63.7	68.9	74.2	79.8	3.5	8.7	14.0	19.6
14	33.8	35.8	38.7	41.7	44.9	2.0	4.9	7.9	11.0
18	210.6	218.4	231.1	244.2	258.1	7.8	20.4	33.5	47.4
19	78.3	81.2	85.9	90.7	95.9	2.9	7.6	12.5	17.6
21	78.6	81.5	86.2	91.1	96.3	2.9	7.6	12.5	17.7
Inner Study Area Total	1360.2	1425.6	1526.3	1629.8	1738.8	65.4	166.1	269.6	378.5
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	2592.2	2695.7	2854.2	3011.8	3174.5	103.5	262.1	419.7	582.3

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	105.8	21.4	127.2
2	88.3	15.5	103.8
3	33.8	11.6	45.4
4	25.4	5.9	31.3
5	64.0	14.8	78.8
6	45.3	9.1	54.5
7	49.1	11.4	60.5
8	63.0	12.6	75.6
9	32.6	9.5	42.1
10	43.6	9.7	53.3
11	119.5	21.3	140.7
12	62.7	22.8	85.5
13	47.9	12.3	60.2
14	25.7	8.1	33.8
15	334.1	63.2	397.2
16	93.5	21.8	115.4
17	172.4	42.6	215.0
18	172.0	38.6	210.6
19	63.7	14.6	78.3
20	297.3	79.4	376.7
21	66.3	12.3	78.6
22	106.9	20.8	127.7
Total	2,112.9	479.3	2,592.2

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)

South West Metropolitan Road & Leisure Study

Table 1 Conventional green shopping patterns

Road Name	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	
	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage		
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A note about the data source and methodology, including references to the South West Metropolitan Road & Leisure Study and the Department of Transport.

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	1,153.0	1,380.5	36.0	141.5	121.9
2021	1,148.4	1,435.6	36.5	141.0	182.7
2026	1,149.6	1,520.0	36.9	141.1	266.3
2031	1,155.3	1,603.9	37.4	141.8	344.2
2036	1,161.1	1,690.6	37.8	142.5	424.7
Study Area Market Share (%)		53.3			

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 53.3% 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	121.9	10,500	13,400
2021	182.7	15,800	20,100
2026	266.3	23,000	29,200
2031	344.2	29,600	37,600
2036	424.7	36,300	46,100

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	121.9	60.3	61.7	5,300	6,800
2021	182.7	60.1	122.6	10,600	13,500
2026	266.3	60.1	206.1	17,800	22,600
2031	344.2	60.4	283.8	24,400	31,000
2036	424.7	60.7	364.0	31,100	39,500

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 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 Hertsmere

Year	Benchmark Turnover (£m) ¹	Survey Turnover (£m) ²	Inflow (£m)	Designated Centre Overtrading (£m)	Surplus Expenditure (£m)
2017	201.4	199.7	0.0	24.5	-26.2
2021	200.6	207.7	0.0	24.4	-17.4
2026	200.8	219.9	0.0	24.7	-5.6
2031	201.8	232.0	0.0	24.8	5.4
2036	202.8	244.5	0.0	24.9	16.8
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 Hertsmere 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 Hertsmere from Table 5

2016 Prices

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

Year	Surplus Expenditure (£m)	Floorspace Capacity (sq m net)	
		Min ¹	Max ²
2017	-26.2	-2,300	-2,900
2021	-17.4	-1,500	-1,900
2026	-5.6	-500	-600
2031	5.4	500	600
2036	16.8	1,400	1,800

- 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 Hertsmere

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
Total			0		0.0

2016 Prices

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

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2017	-26.2	0.0	-26.2	-2,300	-2,900
2021	-17.4	0.0	-17.4	-1,500	-1,900
2026	-5.6	0.0	-5.6	-500	-600
2031	5.4	0.0	5.4	500	600
2036	16.8	0.0	16.8	1,400	1,800

- 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	149.1	0.0	44.6	0.1
2021	103.9	155.0	0.0	44.5	6.6
2026	104.0	164.1	0.0	44.5	15.6
2031	104.5	173.2	0.0	44.7	23.9
2036	105.0	182.5	0.0	45.0	32.5
Study Area Market Share (%)		5.8			

- 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	6.6	600	700
2026	15.6	1,300	1,700
2031	23.9	2,100	2,600
2036	32.5	2,800	3,500

- 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
- 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	-4.1	-400	-500
2021	6.6	4.2	2.4	200	300
2026	15.6	4.2	11.4	1,000	1,300
2031	23.9	4.2	19.7	1,700	2,100
2036	32.5	4.3	28.3	2,400	3,100

- 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	391.3	0.0	125.9
2021	264.3	406.9	0.0	142.6
2026	264.5	430.8	0.0	166.3
2031	265.9	454.6	0.0	188.7
2036	267.2	479.2	0.0	212.0
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	125.9	10,900	13,800
2021	142.6	12,300	15,700
2026	166.3	14,400	18,200
2031	188.7	16,200	20,600
2036	212.0	18,100	23,000

- 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 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: • 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	125.9	30.1	95.8	8,300	10,500
2021	142.6	30.0	112.6	9,700	12,400
2026	166.3	30.0	136.3	11,800	14,900
2031	188.7	30.2	158.6	13,600	17,300
2036	212.0	30.3	181.6	15,500	19,700

- 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	303.1	320.3	0.0	17.2
2021	301.9	333.1	0.0	31.2
2026	302.2	352.7	0.0	50.5
2031	303.7	372.2	0.0	68.5
2036	305.2	392.3	0.0	87.1
Study Area Market Share (%)		12.4		

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 Watford facilities at 12.3% from the Study Area (allows for no inflow uplift)
3. 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	17.2	1,500	1,900
2021	31.2	2,700	3,400
2026	50.5	4,400	5,500
2031	68.5	5,900	7,500
2036	87.1	7,500	9,500

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 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	17.2	13.0	4.3	400	500
2021	31.2	12.9	18.3	1,600	2,000
2026	50.5	12.9	37.6	3,300	4,100
2031	68.5	13.0	55.5	4,800	6,100
2036	87.1	13.1	74.0	6,300	8,000

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 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	320.1	36.0	72.3	4.9
2021	277.8	332.9	36.5	72.1	19.5
2026	278.1	352.5	36.9	72.1	39.2
2031	279.5	372.0	37.4	72.5	57.4
2036	280.9	392.1	37.8	72.9	76.1
Study Area Market Share (%)		12.4			

- 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	4.9	400	500
2021	19.5	1,700	2,100
2026	39.2	3,400	4,300
2031	57.4	4,900	6,300
2036	76.1	6,500	8,300

- 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	4.9	13.0	-8.1	-700	-900
2021	19.5	12.9	6.6	600	700
2026	39.2	13.0	26.2	2,300	2,900
2031	57.4	13.0	44.3	3,800	4,800
2036	76.1	13.1	63.0	5,400	6,800

- 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

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Table 7a: Population

Zone	Population			
	2017	2021	2026	2031
1	63,640	67,718	72,800	77,880
2	51,094	55,172	59,250	63,328
3	26,851	28,238	29,625	31,012
4	13,430	14,947	16,464	17,981
5	40,486	43,203	45,920	48,637
6	29,495	31,112	32,729	34,346
7	27,360	28,977	30,594	32,211
8	23,601	25,218	26,835	28,452
9	18,334	19,951	21,568	23,185
10	24,050	25,667	27,284	28,901
11	67,200	71,278	75,356	79,434
12	35,356	37,973	40,590	43,207
13	26,440	29,057	31,674	34,291
14	14,091	15,708	17,325	18,942
15	201,793	209,821	217,849	225,877
16	50,280	53,897	57,514	61,131
17	18,762	20,379	21,996	23,613
18	95,887	103,915	111,943	120,971
19	26,284	29,901	33,518	37,135
20	200,121	208,149	216,177	224,205
21	34,234	36,851	39,468	42,085
22	63,274	67,352	71,430	75,508
Total	1,020,470	1,070,808	1,121,146	1,171,484

Table 7b: Comparison goods expenditure per capita

Zone	Comparison goods expenditure per capita (£)															
	2017 with B7															
	Clothes	CDs etc	Household Appliances	Computers	Electrical	DIY	Furniture	Total	Clothes	CDs etc	Household Appliances	Computers	Electrical	DIY	Furniture	Total
1	1,096	198	999	409	147	281	278	301	3,898	395	188	851	346	176	278	1,964
2	1,038	182	1,073	424	179	289	271	292	3,586	376	195	888	361	174	249	1,743
3	1,207	260	1,156	498	189	332	289	372	4,289	1,229	213	985	434	144	283	2,440
4	1,438	297	1,326	541	179	375	342	422	4,961	1,523	263	1,113	492	152	319	2,551
5	1,095	188	989	408	147	288	290	277	3,488	373	188	843	346	176	278	1,964
6	1,091	207	1,020	476	183	321	288	337	3,540	359	193	906	405	170	272	2,007
7	1,210	239	1,177	454	167	328	285	366	4,289	1,229	213	985	434	144	283	2,440
8	1,241	286	1,114	487	143	361	276	399	4,887	1,057	219	848	420	172	268	1,825
9	1,082	343	1,481	608	208	429	389	438	6,487	1,348	292	1,245	518	177	306	3,167
10	1,102	281	1,138	544	188	340	287	380	4,289	1,229	213	985	434	144	283	2,440
11	1,098	181	1,033	469	174	302	290	281	3,853	384	183	880	400	174	283	1,964
12	1,105	200	1,005	540	149	340	290	370	4,837	989	189	933	460	177	295	2,134
13	1,041	278	1,247	566	184	322	301	401	4,676	1,128	207	1,042	479	186	309	2,244
14	1,169	248	1,113	588	179	374	299	355	4,317	996	211	948	499	182	318	2,307
15	1,108	223	982	430	192	389	416	418	4,944	1,068	201	916	390	184	296	1,894
16	1,127	267	998	490	137	312	281	334	4,332	960	219	848	488	177	283	1,964
17	1,079	211	1,000	564	140	319	249	395	4,807	919	178	864	472	178	301	2,134
18	1,217	247	1,140	600	181	335	283	389	4,282	1,229	213	985	434	144	283	2,440
19	1,098	281	1,168	517	180	348	281	380	4,688	1,098	214	995	440	142	298	2,007
20	1,082	280	781	361	121	360	212	405	3,483	395	172	888	299	103	307	1,964
21	1,081	278	1,248	574	174	362	288	412	4,683	1,131	207	1,042	488	146	300	2,244
22	1,084	292	1,021	473	174	309	277	361	3,839	392	195	874	409	178	283	1,964
Total	1,096	200	1,000	400	150	290	280	300	3,900	400	200	900	350	175	275	2,000

Notes:
 a. Zones based on the joint catchment shown on the plan in Appendix A.
 b. The 2017 expenditure is based on the Experian MIDAS data (2017 report).
 c. Population derived from Experian MIDAS data (2017 report).
 d. The 2026 expenditure is based on the Experian MIDAS data (2026 report).
 e. Expenditure includes Special Forces of Training in line with adjusted attendance shown from Figure 1 of Appendix 2 of Experian Retail Planner Briefing Note 2.

South West Hertfordshire Retail & Leisure Stud
Market Planning

Table 9: Total comparison goods expenditure analysis
Market Planning

Zone	Comparison goods expenditure (£m)											Comparison goods expenditure (£m)											Comparison goods expenditure (£m)											Comparison goods expenditure (£m)											Comparison goods expenditure (£m)										
	2017		2018			2019			2020			2021		2017		2018			2019			2020			2021		2017		2018			2019			2020			2021																	
1	58.9	15.7	54.2	22.2	8.0	15.2	11.7	16.3	187.1	87.0	12.2	81.7	25.2	9.1	17.3	13.3	19.6	224.4	83.7	15.2	77.1	31.5	11.3	21.7	16.7	23.2	280.4	104.2	19.0	85.2	39.3	14.1	27.0	20.8	29.0	348.8	130.0	25.8	119.8	48.9	17.6	33.6	25.9	36.0	455.2	27.3	83.3	152.5	238.1						

Notes:
 a. Zones based on the post code sectors shown in Appendix A.
 b. Per capita expenditure based on Experian MIDAS data (2017 report).
 c. Population derived from Experian MIDAS data (2017 report).
 d. Per capita expenditure calculated based on the total comparison goods expenditure shown in Tables 9a and 10 of the Retail & Leisure Market Plan.
 e. Expenditure excludes Special Forces of Training in line with the adjusted allowance based from Figure 7 of Appendix 1 of the Retail & Leisure Market Plan.

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Table 17: Chemist goods shopping patterns

Table with columns for Destination, Zone 1-22 Chemist (%), and In-Store Study Area. Rows include various retail zones such as Watford, Hemel Hempstead, St Albans, and Hertsmere, with detailed percentage breakdowns for each zone and a final 'Total (rounded)' row.

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

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	2,161.2	2,127.7	33.5	0.0
2021	2,300.5	2,331.3	36.8	67.6
2026	2,572.4	2,843.9	43.1	314.5
2031	2,868.1	3,466.7	50.4	649.0
2036	3,197.8	4,224.8	59.0	1,086.0
Study Area Market Share (%)		49.8%		

- 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 49.8% 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	67.6	8,500	11,600
2026	314.5	35,200	48,100
2031	649.0	65,200	89,000
2036	1,086.0	97,900	133,600

- 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	67.6	184.5	-116.9	-14,600	-20,000
2026	314.5	206.1	108.4	12,100	16,600
2031	649.0	229.8	419.2	42,100	57,500
2036	1,086.0	256.2	829.8	74,800	102,100

- 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	147.3	147.3	0.0	0.0
2021	156.8	146.1	0.0	-10.6
2026	175.3	178.3	0.0	3.0
2031	195.5	217.3	0.0	21.9
2036	217.9	264.9	0.0	46.9
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	-10.6	-1,300	-1,800
2026	3.0	300	500
2031	21.9	2,200	3,000
2036	46.9	4,200	5,800

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	-10.6	0.0	-10.6	-1,300	-1,800
2026	3.0	0.0	3.0	300	500
2031	21.9	0.0	21.9	2,200	3,000
2036	46.9	0.0	46.9	4,200	5,800

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	54.5	54.5	0.0	0.0
2021	58.0	61.4	0.0	3.4
2026	64.8	74.9	0.0	10.1
2031	72.3	91.3	0.0	19.0
2036	80.6	111.3	0.0	30.7
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	3.4	400	600
2026	10.1	1,100	1,500
2031	19.0	1,900	2,600
2036	30.7	2,800	3,800

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 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	3.4	6.9	-3.4	-400	-600
2026	10.1	7.7	2.4	300	400
2031	19.0	8.6	10.5	1,100	1,400
2036	30.7	9.5	21.2	1,900	2,600

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 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	438.4	438.4	0.0	0.0
2021	466.7	494.4	0.0	27.7
2026	521.8	603.1	0.0	81.2
2031	581.8	735.1	0.0	153.3
2036	648.7	895.9	0.0	247.2
Study Area Market Share (%)		10.6%		

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	27.7	3,500	4,700
2026	81.2	9,100	12,400
2031	153.3	15,400	21,000
2036	247.2	22,300	30,400

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 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	27.7	95.5	-67.8	-8,500	-11,600
2026	81.2	106.8	-25.6	-2,900	-3,900
2031	153.3	119.1	34.3	3,400	4,700
2036	247.2	132.7	114.5	10,300	14,100

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	1,092.2	1,070.3	21.9	0.0
2021	1,162.6	1,206.9	24.0	68.3
2026	1,300.0	1,472.3	28.1	200.3
2031	1,449.5	1,794.7	32.9	378.2
2036	1,616.1	2,187.2	38.5	609.6
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	68.3	8,600	11,700
2026	200.3	22,400	30,600
2031	378.2	38,000	51,900
2036	609.6	54,900	75,000

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 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	68.3	46.0	22.3	2,800	3,800
2026	200.3	51.4	148.9	16,700	22,800
2031	378.2	57.4	320.8	32,200	44,000
2036	609.6	64.0	545.7	49,200	67,100

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	428.8	417.2	11.6	0.0
2021	456.5	422.5	12.8	-21.3
2026	510.4	515.3	14.9	19.8
2031	569.1	628.2	17.5	76.6
2036	634.5	765.6	20.5	151.5
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	-21.3	-2,700	-3,600
2026	19.8	2,200	3,000
2031	76.6	7,700	10,500
2036	151.5	13,700	18,600

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. 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	-21.3	36.1	-57.4	-7,200	-9,800
2026	19.8	40.4	-20.5	-2,300	-3,100
2031	76.6	45.0	31.6	3,200	4,300
2036	151.5	50.2	101.4	9,100	12,500

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