

South West Hertfordshire Retail & Leisure Study

Nexus Planning

Table 1: Population (Scenario 4)

Zone	2017	2021	2026	2031	2036
1	63,649	67,718	72,803	77,889	82,975
2	51,994	55,317	59,472	63,626	67,780
3	20,825	22,223	23,969	25,716	27,462
4	13,439	14,341	15,468	16,595	17,723
5	40,486	43,203	46,598	49,994	53,389
6	25,405	27,110	29,240	31,371	33,502
7	27,350	28,982	31,022	33,063	35,103
8	33,601	35,607	38,113	40,620	43,126
9	16,314	17,288	18,505	19,722	20,939
10	24,080	25,517	27,314	29,110	30,906
11	67,203	72,058	78,126	84,195	90,264
12	38,306	41,073	44,532	47,992	51,451
13	25,440	27,278	29,576	31,873	34,171
14	14,691	15,753	17,079	18,406	19,733
15	201,793	209,921	218,799	226,809	233,987
16	50,286	51,866	53,772	55,511	57,159
17	98,752	104,129	110,301	115,553	120,278
18	95,887	100,757	106,844	112,931	119,018
19	35,284	37,076	39,316	41,556	43,795
20	200,121	209,670	220,104	229,504	238,385
21	34,234	35,972	38,145	40,319	42,492
22	62,274	65,108	68,438	71,558	74,218
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. 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.

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Table 2: Food and Drink Expenditure per Capita (£m) (Scenario 4)

Zone	2017	2021	2026	2031	2036
1	1,291	1,329	1,407	1,493	1,585
2	1,217	1,253	1,326	1,407	1,494
3	1,474	1,517	1,605	1,704	1,809
4	1,665	1,714	1,814	1,925	2,043
5	1,166	1,200	1,270	1,348	1,431
6	1,376	1,417	1,499	1,591	1,689
7	1,515	1,560	1,651	1,752	1,860
8	1,470	1,513	1,601	1,700	1,804
9	1,783	1,835	1,942	2,062	2,189
10	1,403	1,444	1,528	1,622	1,722
11	1,229	1,265	1,339	1,421	1,508
12	1,296	1,334	1,412	1,498	1,590
13	1,590	1,636	1,732	1,838	1,951
14	1,384	1,425	1,508	1,601	1,699
15	1,243	1,279	1,354	1,437	1,525
16	1,273	1,310	1,387	1,472	1,562
17	1,204	1,239	1,312	1,392	1,478
18	1,557	1,603	1,696	1,800	1,911
19	1,470	1,513	1,601	1,699	1,804
20	1,132	1,165	1,233	1,309	1,390
21	1,607	1,654	1,750	1,858	1,972
22	1,381	1,421	1,504	1,596	1,694

Notes:

a. Per capita expenditure projected forward using forecast growth rates taken from Experian Retail Planner Briefing Note 15

2016 Prices

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Table 3: Food and Drink Total Expenditure (£m) (Scenario 4)

Zone	2017	2021	2026	2031	2036
1	82.2	90.0	102.4	116.3	131.5
2	63.3	69.3	78.8	89.5	101.2
3	30.7	33.7	38.5	43.8	49.7
4	22.4	24.6	28.1	31.9	36.2
5	47.2	51.8	59.2	67.4	76.4
6	35.0	38.4	43.8	49.9	56.6
7	41.4	45.2	51.2	57.9	65.3
8	49.4	53.9	61.0	69.0	77.8
9	29.1	31.7	35.9	40.7	45.8
10	33.8	36.8	41.7	47.2	53.2
11	82.6	91.2	104.6	119.7	136.2
12	49.6	54.8	62.9	71.9	81.8
13	40.4	44.6	51.2	58.6	66.7
14	20.3	22.4	25.8	29.5	33.5
15	250.7	268.5	296.1	325.9	356.8
16	64.0	68.0	74.6	81.7	89.3
17	118.9	129.1	144.7	160.9	177.8
18	149.3	161.5	181.2	203.3	227.5
19	51.9	56.1	62.9	70.6	79.0
20	226.6	244.4	271.5	300.5	331.3
21	55.0	59.5	66.8	74.9	83.8
22	86.0	92.5	102.9	114.2	125.7
Total	1,629.9	1,768.0	1,985.9	2,225.4	2,483.1

Notes:

a. Table 1 x Table 2

2016 Prices

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Table 4: Food and Drink Market Share (%) (Scenario 4)

Destination	Watford		Hertsmere				Three Rivers				Dacorum				St.Albans				Inflow			
	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 18	Zone 19	Zone 21	Zone 15	Zone 16	Zone 17	Zone 20	Zone 22
Watford	69.6	54.3	12.6	4.0	7.3	1.5	16.5	20.6	11.6	21.6	0.8	2.7	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.0	15.5	0.0
Others Watford	0.0	2.7	0.0	3.2	0.0	0.0	0.0	0.8	0.0	1.0	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total Watford	69.6	57.1	12.6	7.2	7.3	1.5	16.5	21.4	11.6	22.6	0.8	3.5	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.0	15.5	0.0
Bushey	5.1	1.4	42.7	3.9	1.0	0.0	0.0	3.2	1.3	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	1.0	0.0
Radlett	4.0	0.7	4.0	36.0	13.7	2.3	0.0	0.0	0.0	1.3	0.0	0.0	0.0	0.0	4.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Borehamwood	0.0	0.0	0.8	5.6	34.6	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	1.0	0.0
Potters Bar	0.0	0.0	0.0	1.1	0.0	71.6	0.0	0.0	0.0	0.0	0.8	0.0	0.0	0.0	0.0	16.3	0.0	0.0	0.0	0.0	2.1	0.0
Others Hertsmere	0.0	0.7	0.8	6.9	3.0	1.5	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
Sub-total Hertsmere	9.2	2.7	48.3	53.5	52.4	75.4	0.0	3.2	1.3	2.6	0.0	0.8	0.0	0.0	4.5	16.3	0.0	0.9	0.0	0.0	4.2	0.0
Rickmansworth	4.8	0.7	0.0	0.0	0.0	0.0	47.1	2.4	25.6	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.8	0.0	0.0	0.0	0.0
Others Three Rivers	4.3	8.3	1.6	0.0	2.0	0.0	19.2	5.4	16.4	18.3	0.8	1.1	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.0	1.0	0.0
Sub-total Tree Rivers	9.1	9.0	1.6	0.0	2.0	0.0	66.3	7.8	42.0	19.3	0.8	1.1	0.0	0.0	0.8	0.0	0.0	1.8	0.0	0.0	1.0	0.0
Hemel Hempstead	0.0	0.0	1.1	0.0	0.0	0.0	0.9	0.0	2.7	13.7	56.7	39.7	9.6	3.9	5.3	0.0	0.9	0.0	3.6	0.0	0.0	0.0
Berkhamsted	0.0	0.7	0.0	0.8	0.0	0.0	0.0	0.0	1.0	12.3	1.6	10.4	66.4	20.0	0.0	0.0	0.0	0.0	19.4	5.4	0.0	3.0
Tring	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0	4.4	50.2	0.0	0.0	0.0	0.0	0.0	10.6	2.7	0.0	0.0
Others Dacorum	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	2.3	4.2	13.8	2.7	0.8	0.0	0.8	0.0	0.0	0.9	0.9	3.1	0.0	0.0
Sub-total Dacorum	0.0	2.1	1.1	0.8	0.0	0.0	0.9	0.0	6.0	30.1	73.1	52.8	81.2	74.0	6.1	0.0	0.9	0.9	34.5	11.1	0.0	3.0
St Albans	0.0	3.4	0.8	15.7	4.8	6.8	0.7	1.1	1.0	7.1	8.3	1.6	0.8	0.0	62.0	20.8	11.0	0.0	0.9	0.0	0.0	5.6
Harpenden	0.0	0.0	0.0	0.8	0.0	1.1	0.0	0.0	0.0	1.0	0.0	1.6	0.0	0.0	6.2	0.0	68.6	0.0	0.0	1.3	0.0	4.8
Others St Albans	0.8	0.7	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.0	1.9	0.8	0.0	0.0	5.9	9.0	4.1	0.0	0.0	0.0	0.0	2.8
Sub-total St Albans	0.8	4.1	0.8	16.5	4.8	7.9	1.4	1.1	1.0	8.1	10.2	4.1	0.8	0.0	74.0	29.8	83.7	0.0	0.9	1.3	0.0	13.1
Sub-total Authority Areas	88.7	75.0	64.4	78.0	66.5	84.8	85.0	33.4	61.9	82.7	84.9	62.2	81.9	74.0	85.4	46.1	84.6	4.9	35.4	12.5	20.7	16.1
Central London	4.3	11.1	19.2	7.4	10.3	2.3	8.3	13.6	11.0	4.2	12.0	13.3	3.6	9.6	9.8	8.1	5.6	4.7	4.8	5.3	6.6	3.8
Eastcote	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.6	0.0	0.0	0.0	0.0
Harrow	3.2	2.7	0.0	0.0	0.0	0.0	0.0	1.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.8	0.0	0.0	3.6	0.0
Hatch End	0.0	7.6	1.6	0.0	2.0	0.0	0.0	8.5	4.0	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	13.8	0.0	0.0	8.7	0.0
Pinner	0.0	0.0	0.8	0.0	0.0	0.0	0.7	1.6	4.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.1	0.0	0.0	1.5	0.0
Ruislip	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.8	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	15.0	0.0	0.0	0.0	0.0
Dunstable	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0	0.0	0.0	0.0	22.3	0.0	1.5
Leighton Buzzard	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	30.4	0.0	0.0
Northwood	0.8	0.7	0.0	0.0	0.0	0.0	2.6	24.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.1	0.0	0.0	0.0	0.0
Barnet	0.0	0.0	0.0	1.3	5.2	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	14.9	0.0
Stanmore	0.0	0.7	5.0	0.0	2.1	0.0	0.0	8.9	0.0	3.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	13.4	0.0
Aylesbury	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0	0.0	1.1	3.1	5.4	0.0	0.0	0.0	0.0	13.9	2.6	0.0	0.0
Hatfield	0.0	0.0	0.0	3.2	1.0	1.1	0.0	0.0	0.0	0.0	0.8	0.0	0.0	0.8	18.3	1.0	0.0	0.0	0.0	0.0	0.0	11.6
Mill Hill	0.0	0.0	0.0	0.0	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	12.7	0.0
Uxbridge	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.0	0.0	0.0	0.0	0.0
Welwyn Garden City	0.0	0.0	0.0	0.0	0.0	3.4	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	1.1	4.6	1.0	0.0	0.0	0.0	0.0	36.7
Others Outside Authority Areas	3.0	1.6	8.2	10.1	10.8	7.2	3.4	2.3	18.2	6.3	3.1	22.6	11.4	10.2	1.7	23.0	7.9	18.0	45.9	26.9	17.9	30.3
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes:

a. Market shares derived directly from NEMS household survey (November 2017 and March 2018)

South West Hertfordshire Retail & Leisure Study
Nexus Planning

Table 6: Food and Drink Expenditure @ 2021 (£m) (Scenario 4)

Destination	Watford			Hertsmere			Three Rivers			Dacorum				St.Albans			Inflow			Total			
	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 18	Zone 19	Zone 21	Zone 15	Zone 16		Zone 17	Zone 20	Zone 22
Watford	62.6	37.7	4.3	1.0	3.8	0.6	7.4	11.1	3.7	8.0	0.7	1.5	0.0	0.0	0.0	0.0	0.0	3.4	0.0	0.0	37.8	0.0	183.4
Others Watford	0.0	1.9	0.0	0.8	0.0	0.0	0.0	0.4	0.0	0.4	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.9
Sub-total Watford	62.6	39.6	4.3	1.8	3.8	0.6	7.4	11.5	3.7	8.3	0.7	1.9	0.0	0.0	0.0	0.0	0.0	3.4	0.0	0.0	37.8	0.0	187.3
Bushey	4.6	1.0	14.4	1.0	0.5	0.0	0.0	1.7	0.4	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.4	0.0	0.0	2.6	0.0	29.1
Radlett	3.6	0.5	1.3	8.9	7.1	0.9	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	7.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	30.0
Borehamwood	0.0	0.0	0.3	1.4	17.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.6	0.0	22.1
Potters Bar	0.0	0.0	0.0	0.3	0.0	27.5	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	9.1	0.0	0.0	0.0	5.1	0.0	42.5
Others Hertsmere	0.0	0.5	0.3	1.7	1.6	0.6	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	4.6
Sub-total Hertsmere	8.2	1.9	16.3	13.2	27.2	29.0	0.0	1.7	0.4	1.0	0.0	0.4	0.0	0.0	7.2	9.1	0.0	2.4	0.0	0.0	10.3	0.0	128.3
Rickmansworth	4.3	0.5	0.0	0.0	0.0	0.0	21.3	1.3	8.1	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.9	0.0	0.0	0.0	0.0	40.7
Others Three Rivers	3.9	5.8	0.5	0.0	1.1	0.0	8.7	2.9	5.2	6.8	0.7	0.6	0.0	0.0	1.3	0.0	0.0	0.0	0.0	0.0	2.6	0.0	40.0
Sub-total Three Rivers	8.2	6.2	0.5	0.0	1.1	0.0	30.0	4.2	13.3	7.1	0.7	0.6	0.0	0.0	1.3	0.0	0.0	4.9	0.0	0.0	2.6	0.0	80.7
Hemel Hempstead	0.0	0.0	0.4	0.0	0.0	0.0	0.4	0.0	0.9	5.0	51.7	21.7	4.3	0.9	8.6	0.0	0.5	0.0	2.5	0.0	0.0	0.0	96.8
Berkhamsted	0.0	0.5	0.0	0.2	0.0	0.0	0.0	0.0	0.3	4.5	1.4	5.7	29.6	4.5	0.0	0.0	0.0	13.2	6.9	0.0	2.8	69.7	
Tring	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0	2.0	11.3	0.0	0.0	0.0	0.0	7.2	3.5	0.0	0.0	25.4
Others Dacorum	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.7	1.5	12.6	1.5	0.4	0.0	1.3	0.0	0.0	2.4	0.6	4.0	0.0	0.0	25.4
Sub-total Dacorum	0.0	1.4	0.4	0.2	0.0	0.0	0.4	0.0	1.9	11.1	66.6	28.9	36.2	16.6	9.9	0.0	0.5	2.4	23.5	14.3	0.0	2.8	217.3
St Albans	0.0	2.4	0.3	3.9	2.5	2.6	0.3	0.6	0.3	2.6	7.6	0.9	0.4	0.0	100.1	11.7	6.5	0.0	0.6	0.0	5.1	148.3	
Harpenden	0.0	0.0	0.0	0.2	0.0	0.4	0.0	0.0	0.4	0.0	0.9	0.0	0.0	0.0	9.9	0.0	40.8	0.0	0.0	1.7	0.0	4.4	58.8
Others St Albans	0.7	0.5	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	1.7	0.4	0.0	0.0	9.5	5.0	2.4	0.0	0.0	0.0	0.0	2.6	23.2
Sub-total St Albans	0.7	2.9	0.3	4.1	2.5	3.0	0.6	0.3	3.0	9.3	2.2	0.4	0.0	119.5	16.7	49.8	0.0	0.6	1.7	0.0	12.1	230.2	
Sub-total Authority Areas	79.8	52.0	21.7	19.2	34.5	32.6	38.4	18.0	19.6	30.5	77.4	34.1	36.6	16.6	138.0	25.8	50.3	13.2	24.1	16.1	50.6	14.9	843.9
Central London	3.9	7.7	6.5	1.8	5.4	0.9	3.8	7.3	3.5	1.5	10.9	7.3	1.6	2.2	15.9	4.5	3.4	12.6	3.3	6.8	16.2	3.5	130.4
Eastcote	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	17.7	0.0	0.0	0.0	0.0	17.7
Harrow	2.9	1.9	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	34.4	0.0	0.0	8.8	0.0	48.9
Hatch End	0.0	5.3	0.5	0.0	1.1	0.0	0.0	4.6	1.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	37.1	0.0	0.0	21.4	0.0	71.5
Pinner	0.0	0.0	0.3	0.0	0.0	0.0	0.3	0.8	1.3	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	32.5	0.0	0.0	3.6	0.0	39.1
Ruislip	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.4	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	40.2	0.0	0.0	0.0	0.0	41.3
Dunstable	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.8	0.0	0.0	0.0	0.0	28.8	0.0	1.4	32.0
Leighton Buzzard	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	39.2	0.0	0.0	39.4
Northwood	0.7	0.5	0.0	0.0	0.0	0.0	1.2	13.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	16.5	0.0	0.0	0.0	0.0	32.1
Barnet	0.0	0.0	0.0	0.3	2.7	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	36.3	0.0	39.7
Stanmore	0.0	0.5	1.7	0.0	1.1	0.0	0.0	4.8	0.0	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	32.8	0.0	42.3
Aylesbury	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.6	1.4	1.2	0.0	0.0	0.0	0.0	9.4	3.4	0.0	0.0	0.0	16.8
Hatfield	0.0	0.0	0.0	0.8	0.5	0.4	0.0	0.0	0.0	0.0	0.4	0.0	0.0	1.3	10.3	0.6	0.0	0.0	0.0	0.0	10.7	0.0	25.0
Mill Hill	0.0	0.0	0.0	0.0	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	31.0	0.0	32.1	
Uxbridge	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	16.1	0.0	0.0	0.0	0.0	18.2
Welwyn Garden City	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	1.8	2.6	0.6	0.0	0.0	0.0	0.0	34.0	40.7
Others Outside Authority Areas	2.7	1.1	2.8	2.5	5.6	2.8	1.5	1.2	5.8	2.3	2.8	12.4	5.1	2.3	2.7	12.9	4.7	48.2	31.2	34.7	43.7	28.0	257.0
Total	90.0	69.3	33.7	24.6	51.8	38.4	45.2	53.9	31.7	36.8	91.2	54.8	44.6	22.4	161.5	56.1	59.5	268.5	68.0	129.1	244.4	92.5	1,768.0

Notes:

a. Table 3 x Table 4

2016 Prices

South West Hertfordshire Retail & Leisure Study
Nexus Planning

Table 10: Food and Drink Available Expenditure (£m) (Scenario 4)

Destination	2017	2021	2026	2031	2036
Available Expenditure					
Watford	168.2	183.4	207.5	234.2	263.2
<i>Others Watford</i>	3.6	3.9	4.5	5.1	5.7
Sub-total Watford	171.7	187.3	211.9	239.2	269.0
Bushey	26.6	29.1	33.0	37.4	42.1
Radlett	27.4	30.0	34.1	38.7	43.7
Borehamwood	20.2	22.1	25.2	28.6	32.3
Potters Bar	38.9	42.5	48.1	54.5	61.4
<i>Others Hertsmere</i>	4.2	4.6	5.3	6.0	6.8
Sub-total Hertsmere	117.3	128.3	145.7	165.1	186.2
Rickmansworth	37.4	40.7	46.0	51.9	58.4
<i>Others Three Rivers</i>	36.6	40.0	45.3	51.2	57.7
Sub-total Tree Rivers	74.0	80.7	91.3	103.2	116.1
Hemel Hempstead	88.1	96.8	110.7	126.1	143.1
Berkhamsted	63.8	69.7	78.9	89.1	100.2
Tring	23.3	25.4	28.6	32.3	36.2
<i>Others Dacorum</i>	23.3	25.4	28.9	32.7	36.8
Sub-total Dacorum	198.4	217.3	247.1	280.2	316.3
St Albans	136.8	148.3	166.8	187.6	210.2
Harpenden	54.3	58.8	66.0	74.0	82.7
<i>Others St Albans</i>	21.4	23.2	26.0	29.2	32.7
Sub-total St Albans	212.5	230.2	258.8	290.8	325.6
Total	774.0	843.9	954.8	1,078.4	1,213.1

Notes:

a. Table 5-9

Table 11: Food and Drink Benchmark Turnover (£m) (Scenario 4)

Destination	2017	2021	2026	2031	2036
Benchmark Turnover					
Watford	168.2	180.8	202.1	225.4	251.3
<i>Others Watford</i>	3.6	3.8	4.3	4.8	5.3
Sub-total Watford	171.7	184.6	206.4	230.2	256.6
Bushey	26.6	28.6	32.0	35.7	39.8
Radlett	27.4	29.5	33.0	36.8	41.0
Borehamwood	20.2	21.7	24.3	27.1	30.2
Potters Bar	38.9	41.8	46.7	52.1	58.1
<i>Others Hertsmere</i>	4.2	4.5	5.0	5.6	6.3
Sub-total Hertsmere	117.3	126.1	141.0	157.2	175.3
Rickmansworth	37.4	40.2	45.0	50.1	55.9
<i>Others Three Rivers</i>	36.6	39.4	44.0	49.1	54.7
Sub-total Tree Rivers	74.0	79.6	89.0	99.2	110.6
Hemel Hempstead	88.1	94.7	105.9	118.0	131.6
Berkhamsted	63.8	68.6	76.7	85.5	95.4
Tring	23.3	25.0	28.0	31.2	34.8
<i>Others Dacorum</i>	23.3	25.0	28.0	31.2	34.8
Sub-total Dacorum	198.4	213.3	238.5	265.9	296.5
St Albans	136.8	147.1	164.4	183.3	204.4
Harpenden	54.3	58.4	65.3	72.8	81.2
<i>Others St Albans</i>	21.4	23.0	25.7	28.6	31.9
Sub-total St Albans	212.5	228.4	255.4	284.8	317.5
Total	774.0	832.1	930.4	1,037.4	1,156.6

Notes:

a. Table 5-9

b. Turnover projected forward using forecast sales density efficiencies taken from Experian Retail Planner Briefing Note 15

Table 12: Food and Drink Surplus Expenditure (£m) (Scenario 4)

Destination	2017	2021	2026	2031	2036
Surplus Expenditure					
Watford	-	2.6	5.3	8.8	11.9
<i>Others Watford</i>	-	0.1	0.2	0.3	0.4
Sub-total Watford	-	2.7	5.5	9.1	12.3
Bushey	-	0.5	1.0	1.7	2.3
Radlett	-	0.5	1.1	1.9	2.7
Borehamwood	-	0.4	0.9	1.5	2.1
Potters Bar	-	0.7	1.4	2.4	3.3
<i>Others Hertsmere</i>	-	0.1	0.2	0.4	0.5
Sub-total Hertsmere	-	2.2	4.6	7.8	10.9
Rickmansworth	-	0.5	1.1	1.8	2.4
<i>Others Three Rivers</i>	-	0.6	1.3	2.1	3.0
Sub-total Tree Rivers	-	1.1	2.3	3.9	5.4
Hemel Hempstead	-	2.2	4.8	8.1	11.5
Berkhamsted	-	1.1	2.2	3.6	4.9
Tring	-	0.3	0.6	1.0	1.4
<i>Others Dacorum</i>	-	0.4	0.9	1.5	2.0
Sub-total Dacorum	-	4.0	8.6	14.3	19.8
St Albans	-	1.2	2.4	4.2	5.8
Harpenden	-	0.4	0.6	1.1	1.5
<i>Others St Albans</i>	-	0.2	0.4	0.6	0.8
Sub-total St Albans	-	1.8	3.4	6.0	8.0
Total	-	11.8	24.4	41.1	56.5

Notes:

a. Table 10 - Table 11

2016 Prices

South West Hertfordshire Retail & Leisure Study
Nexus Planning

Table 13: Food and Drink Floorspace Capacity (sq m) (Scenario 4)

Destination	2017	2021	2026	2031	2036
Sales Density (£ per sq m)	5,000	5,375	6,010	6,701	7,471
Surplus Expenditure					
Watford	-	491.9	885.4	1,310.9	1,599.1
<i>Others Watford</i>	-	13.8	27.0	41.2	52.3
Sub-total Watford	-	505.7	912.4	1,352.1	1,651.4
Bushey	-	88.8	165.6	247.7	306.7
Radlett	-	95.5	185.2	283.2	358.8
Borehamwood	-	79.0	151.7	227.8	285.9
Potters Bar	-	125.4	235.0	353.7	440.6
<i>Others Hertsmere</i>	-	18.0	35.5	53.9	68.6
Sub-total Hertsmere	-	406.6	773.0	1,166.4	1,460.7
Rickmansworth	-	96.2	174.9	265.6	326.9
<i>Others Three Rivers</i>	-	111.8	210.8	320.6	401.6
Sub-total Tree Rivers	-	208.0	385.6	586.2	728.4
Hemel Hempstead	-	402.5	798.6	1,209.8	1,538.6
Berkhamsted	-	196.8	365.8	539.0	653.0
Tring	-	59.5	106.5	154.3	181.7
<i>Others Dacorum</i>	-	82.6	154.2	225.3	273.7
Sub-total Dacorum	-	741.5	1,425.1	2,128.5	2,646.9
St Albans	-	231.2	399.1	631.4	771.6
Harpenden	-	69.2	107.4	170.1	195.2
<i>Others St Albans</i>	-	34.9	58.8	92.1	109.2
Sub-total St Albans	-	335.4	565.4	893.6	1,076.0
Total	-	2,197.2	4,061.5	6,126.8	7,563.4

Notes:

a. Table 12

2016 Prices