

South West Hertfordshire Retail & Leisure Study

Nexus Planning

Table 1: Population (Scenario 2)

Zone	2017	2021	2026	2031	2036
1	63,113	65,036	67,440	69,844	72,248
2	51,556	53,127	55,091	57,055	59,019
3	20,662	21,404	22,332	23,261	24,189
4	13,334	13,813	14,412	15,011	15,610
5	40,168	41,611	43,416	45,220	47,025
6	25,205	26,111	27,244	28,376	29,508
7	27,105	27,758	28,574	29,390	30,206
8	33,301	34,103	35,105	36,108	37,110
9	16,168	16,558	17,045	17,531	18,018
10	23,865	24,440	25,158	25,877	26,595
11	66,656	69,322	72,656	75,989	79,322
12	37,994	39,514	41,414	43,314	45,214
13	25,233	26,243	27,505	28,767	30,029
14	14,572	15,155	15,883	16,612	17,341
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	95,371	98,176	101,682	105,188	108,694
19	35,094	36,126	37,416	38,706	39,997
20	200,121	209,670	220,104	229,504	238,385
21	34,049	35,051	36,302	37,554	38,806
22	62,274	65,108	68,438	71,558	74,218
Total	1,236,672	1,284,242	1,340,090	1,392,739	1,442,959

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 2)

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 2)

Zone	2017	2021	2026	2031	2036
1	81.5	86.4	94.9	104.3	114.5
2	62.7	66.6	73.0	80.3	88.2
3	30.5	32.5	35.9	39.6	43.8
4	22.2	23.7	26.1	28.9	31.9
5	46.8	49.9	55.1	61.0	67.3
6	34.7	37.0	40.8	45.2	49.8
7	41.1	43.3	47.2	51.5	56.2
8	48.9	51.6	56.2	61.4	66.9
9	28.8	30.4	33.1	36.1	39.4
10	33.5	35.3	38.4	42.0	45.8
11	81.9	87.7	97.3	108.0	119.7
12	49.2	52.7	58.5	64.9	71.9
13	40.1	42.9	47.6	52.9	58.6
14	20.2	21.6	24.0	26.6	29.5
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	148.5	157.3	172.5	189.4	207.7
19	51.6	54.7	59.9	65.8	72.1
20	226.6	244.4	271.5	300.5	331.3
21	54.7	58.0	63.5	69.8	76.5
22	86.0	92.5	102.9	114.2	125.7
Total	1,623.3	1,733.9	1,913.8	2,110.6	2,320.7

Notes:

a. Table 1 x Table 2

2016 Prices

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Nexus Planning

Table 4: Food and Drink Market Share (%) (Scenario 2)

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	3.4	0.0	0.8	0.0	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 5: Food and Drink Expenditure @ 2017 (£m) (Scenario 2)

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	56.7	34.1	3.8	0.9	3.4	0.5	6.8	10.1	3.3	7.2	0.7	1.3	0.0	0.0	0.0	0.0	0.0	3.2	0.0	0.0	35.0	0.0	167.1
Others Watford	0.0	1.7	0.0	0.7	0.0	0.0	0.0	0.4	0.0	0.3	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.5
Sub-total Watford	56.7	35.8	3.8	1.6	3.4	0.5	6.8	10.5	3.3	7.6	0.7	1.7	0.0	0.0	0.0	0.0	0.0	3.2	0.0	0.0	35.0	0.0	170.6
Bushey	4.2	0.9	13.0	0.9	0.5	0.0	0.0	1.6	0.4	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.3	0.0	0.0	2.4	0.0	26.5
Radlett	3.3	0.4	1.2	8.0	6.4	0.8	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	6.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	27.2
Borehamwood	0.0	0.0	0.2	1.2	16.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.4	0.0	20.1
Potters Bar	0.0	0.0	0.0	0.2	0.0	24.8	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	8.4	0.0	0.0	0.0	0.0	0.0	4.8	0.0	38.6
Others Hertsmere	0.0	0.4	0.2	1.5	1.4	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.2
Sub-total Hertsmere	7.5	1.7	14.7	11.9	24.5	26.2	0.0	1.6	0.4	0.9	0.0	0.4	0.0	0.0	6.7	8.4	0.0	2.3	0.0	0.0	9.5	0.0	116.5
Rickmansworth	3.9	0.4	0.0	0.0	0.0	0.0	19.4	1.2	7.4	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.6	0.0	0.0	0.0	0.0	37.1
Others Three Rivers	3.5	5.2	0.5	0.0	1.0	0.0	7.9	2.7	4.7	6.1	0.7	0.5	0.0	0.0	1.2	0.0	0.0	0.0	0.0	0.0	2.4	0.0	36.3
Sub-total Three Rivers	7.4	5.7	0.5	0.0	1.0	0.0	27.2	3.8	12.1	6.5	0.7	0.5	0.0	0.0	1.2	0.0	0.0	4.6	0.0	0.0	2.4	0.0	73.5
Hemel Hempstead	0.0	0.0	0.3	0.0	0.0	0.0	0.4	0.0	0.8	4.6	46.4	19.5	3.8	0.8	7.9	0.0	0.5	0.0	2.3	0.0	0.0	0.0	87.4
Berkhamsted	0.0	0.4	0.0	0.2	0.0	0.0	0.0	0.3	4.1	1.3	5.1	26.6	4.0	0.0	0.0	0.0	0.0	12.4	6.4	0.0	2.6	0.0	63.5
Tring	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	1.8	10.1	0.0	0.0	0.0	0.0	6.8	3.2	0.0	0.0	0.0	23.2
Others Dacorum	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.7	1.4	11.3	1.3	0.3	0.0	1.2	0.0	0.0	0.0	2.3	0.6	3.6	0.0	0.0	23.1
Sub-total Dacorum	0.0	1.3	0.3	0.0	0.0	0.0	0.4	0.0	1.7	10.1	59.9	26.0	32.5	14.9	9.1	0.0	0.5	2.3	22.1	13.2	0.0	2.6	197.2
St Albans	0.0	2.2	0.2	3.5	2.2	2.4	0.3	0.5	0.3	2.4	6.8	0.8	0.3	0.0	92.0	10.7	6.0	0.0	0.6	0.0	4.8	0.0	136.0
Harpden	0.0	0.0	0.0	0.2	0.0	0.4	0.0	0.0	0.0	0.3	0.0	0.8	0.0	0.0	9.1	0.0	37.5	0.0	0.0	1.6	0.0	4.1	54.1
Others St Albans	0.7	0.4	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	1.5	0.4	0.0	0.0	8.7	4.6	2.2	0.0	0.0	0.0	2.4	0.0	21.3
Sub-total St Albans	0.7	2.6	0.2	3.7	2.2	2.7	0.6	0.5	0.3	2.7	8.4	2.0	0.3	0.0	109.9	15.4	45.8	0.0	0.6	1.6	0.0	11.3	211.4
Sub-total Authority Areas	72.3	47.1	19.6	17.3	31.1	29.4	34.9	16.4	17.8	27.7	69.5	30.6	32.9	14.9	126.9	23.8	46.3	12.3	22.7	14.8	46.9	13.9	769.1
Central London	3.5	6.9	5.9	1.6	4.8	0.8	3.4	6.7	3.2	1.4	9.8	6.6	1.4	1.9	14.6	4.2	3.1	11.8	3.1	6.3	15.0	3.2	119.3
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	16.5	0.0	0.0	0.0	0.0	16.5
Harrow	2.6	1.7	0.0	0.0	0.0	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	32.1	0.0	0.0	8.2	0.0	45.4
Hatch End	0.0	4.8	0.5	0.0	1.0	0.0	0.0	4.2	1.1	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	34.6	0.0	0.0	19.8	0.0	66.3
Pinner	0.0	0.0	0.2	0.0	0.0	0.0	0.3	0.8	1.1	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	30.3	0.0	0.0	3.3	0.0	36.5
Ruislip	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.4	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	37.5	0.0	0.0	0.0	0.0	38.5
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	1.7	0.0	0.0	0.0	0.0	26.5	0.0	1.3	29.5
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	0.2	0.0	0.0	0.0	0.0	0.0	0.0	36.2	0.0	0.0	36.3
Northwood	0.7	0.4	0.0	0.0	0.0	1.1	12.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	15.4	0.0	0.0	0.0	0.0	29.6
Barnet	0.0	0.0	0.0	0.3	2.4	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	33.7	0.0	36.7
Stanmore	0.0	0.4	1.5	0.0	1.0	0.0	0.0	4.4	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	30.4	0.0	39.0
Aylesbury	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.5	1.2	1.1	0.0	0.0	0.0	0.0	8.9	3.1	0.0	0.0	0.0	15.6
Hatfield	0.0	0.0	0.0	0.7	0.5	0.4	0.0	0.0	0.0	0.0	0.4	0.0	0.0	1.2	9.4	0.5	0.0	0.0	0.0	0.0	9.9	0.0	23.1
Mill Hill	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	28.7	0.0	29.7
Uxbridge	0.0	0.0	0.0	0.0	0.0	0.0	1.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	15.0	0.0	0.0	0.0	0.0	17.0
Welwyn Garden City	0.0	0.0	0.0	0.0	1.2	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	1.7	2.4	0.5	0.0	0.0	0.0	0.0	31.6	0.0	37.7
Others Outside Authority Areas	2.4	1.0	2.5	2.2	5.1	2.5	1.4	1.1	5.3	2.1	2.5	11.1	4.6	2.1	2.5	11.8	4.3	45.0	29.4	32.0	40.5	26.1	237.6
Total	81.5	62.8	30.4	22.2	46.8	34.7	41.1	48.9	28.8	33.5	81.9	49.2	40.1	20.2	148.5	51.6	54.7	250.7	64.0	118.9	226.6	86.0	1,623.3

Notes:

a. Table 3 x Table 4

2016 Prices

South West Hertfordshire Retail & Leisure Study
Nexus Planning

Table 6: Food and Drink Expenditure @ 2021 (£m) (Scenario 2)

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	60.1	36.2	4.1	0.9	3.6	0.6	7.1	10.6	3.5	7.6	0.7	1.4	0.0	0.0	0.0	0.0	0.0	3.4	0.0	0.0	37.8	0.0	177.7	
Others Watford	0.0	1.8	0.0	0.8	0.0	0.0	0.0	0.4	0.0	0.3	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.8	
Sub-total Watford	60.1	38.0	4.1	1.7	3.6	0.6	7.1	11.0	3.5	8.0	0.7	1.8	0.0	0.0	0.0	0.0	0.0	3.4	0.0	0.0	37.8	0.0	181.5	
Bushey	4.4	0.9	13.9	0.9	0.5	0.0	0.0	1.6	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	28.2	
Radlett	3.5	0.4	1.3	8.5	6.9	0.8	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	7.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	29.0	
Borehamwood	0.0	0.0	0.3	1.3	17.3	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	2.6	0.0	21.4	
Potters Bar	0.0	0.0	0.0	0.3	0.0	26.5	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	8.9	0.0	0.0	0.0	0.0	0.0	5.1	0.0	41.2	
Others Hertsmere	0.0	0.5	0.2	1.6	1.5	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	4.4	
Sub-total Hertsmere	7.9	1.8	15.7	12.7	26.2	27.9	0.0	1.6	0.4	0.9	0.0	0.4	0.0	0.0	7.1	8.9	0.0	2.4	0.0	0.0	10.3	0.0	124.2	
Rickmansworth	4.2	0.5	0.0	0.0	0.0	0.0	20.4	1.2	7.8	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.9	0.0	0.0	0.0	0.0	39.2	
Others Three Rivers	3.7	5.5	0.5	0.0	1.0	0.0	8.3	2.8	5.0	6.5	0.7	0.6	0.0	0.0	1.3	0.0	0.0	0.0	0.0	0.0	2.6	0.0	38.5	
Sub-total Three Rivers	7.9	6.0	0.5	0.0	1.0	0.0	28.7	4.0	12.8	6.8	0.7	0.6	0.0	0.0	1.3	0.0	0.0	4.9	0.0	0.0	2.6	0.0	77.7	
Hemel Hempstead	0.0	0.0	0.3	0.0	0.0	0.0	0.4	0.0	0.8	4.8	49.7	20.9	4.1	0.8	8.4	0.0	0.5	0.0	2.5	0.0	0.0	0.0	93.3	
Berkhamsted	0.0	0.5	0.0	0.2	0.0	0.0	0.0	0.3	4.3	1.4	5.5	28.5	4.3	0.0	0.0	0.0	0.0	13.2	6.9	0.0	2.8	0.0	67.9	
Tring	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	1.9	10.8	0.0	0.0	0.0	0.0	7.2	3.5	0.0	0.0	24.8	
Others Dacorum	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.7	1.5	12.1	1.4	0.3	0.0	1.3	0.0	0.0	2.4	0.6	4.0	0.0	0.0	24.8	
Sub-total Dacorum	0.0	1.4	0.3	0.2	0.0	0.0	0.4	0.0	1.8	10.6	64.1	27.8	34.8	16.0	9.7	0.0	0.5	2.4	23.5	14.3	0.0	2.8	0.0	210.7
St Albans	0.0	2.3	0.3	3.7	2.4	2.5	0.3	0.6	0.3	2.5	7.3	0.9	0.3	0.0	97.5	11.4	6.4	0.0	0.6	0.0	0.0	5.1	144.3	
Harpenden	0.0	0.0	0.0	0.2	0.0	0.4	0.0	0.0	0.0	0.3	0.0	0.9	0.0	0.0	9.7	0.0	39.8	0.0	0.0	1.7	0.0	4.4	57.4	
Others St Albans	0.7	0.5	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	1.6	0.4	0.0	0.0	9.2	4.9	2.4	0.0	0.0	0.0	0.0	2.6	22.6	
Sub-total St Albans	0.7	2.7	0.3	3.9	2.4	2.9	0.6	0.3	2.9	8.9	2.1	0.3	0.0	116.4	16.3	48.5	0.0	0.6	1.7	0.0	12.1	0.0	224.3	
Sub-total Authority Areas	76.6	49.9	20.9	18.5	33.2	31.4	36.8	17.2	18.8	29.2	74.4	32.8	35.2	16.0	134.4	25.2	49.0	13.2	24.1	16.1	50.6	14.9	818.4	
Central London	3.7	7.4	6.2	1.7	5.2	0.9	3.6	7.0	3.3	1.5	10.5	7.0	1.5	2.1	15.5	4.4	3.3	12.6	3.3	6.8	16.2	3.5	127.2	
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	2.8	1.8	0.0	0.0	0.0	0.0	0.0	0.8	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	48.7	
Hatch End	0.0	5.1	0.5	0.0	1.0	0.0	0.0	4.4	1.2	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	71.0	
Pinner	0.0	0.0	0.3	0.0	0.0	0.0	0.3	0.8	1.2	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	32.5	0.0	0.0	3.6	0.0	39.0	
Ruislip	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.4	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	40.2	0.0	0.0	0.0	0.0	41.2	
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	0.2	0.0	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	1.1	12.7	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	31.4	
Barnet	0.0	0.0	0.0	0.3	2.6	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	36.3	0.0	39.6	
Stanmore	0.0	0.4	1.6	0.0	1.0	0.0	0.0	4.6	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	41.9	
Aylesbury	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.6	1.3	1.2	0.0	0.0	0.0	0.0	9.4	3.4	0.0	0.0	16.6	
Hatfield	0.0	0.0	0.0	0.8	0.5	0.4	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	1.3	10.0	0.6	0.0	0.0	0.0	10.7	0.0	24.6	
Mill Hill	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	31.0	0.0	32.0	
Uxbridge	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	16.1	0.0	0.0	0.0	0.0	18.1	
Welwyn Garden City	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	1.8	2.5	0.6	0.0	0.0	0.0	0.0	34.0	40.5	
Others Outside Authority Areas	2.6	1.1	2.7	2.4	5.4	2.7	1.5	1.2	5.5	2.2	2.7	11.9	4.9	2.2	2.6	12.5	4.6	48.2	31.2	34.7	43.7	28.0	254.6	
Total	86.4	66.6	32.5	23.7	49.9	37.0	43.3	51.6	30.4	35.3	87.7	52.7	42.9	21.6	157.4	54.7	58.0	268.5	68.0	129.1	244.4	92.5	1,733.9	

Notes:

a. Table 3 x Table 4

2016 Prices

Table 7: Food and Drink Expenditure @ 2026 (£m) (Scenario 2)

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	66.0	39.7	4.5	1.0	4.0	0.6	7.8	11.6	3.8	8.3	0.8	1.6	0.0	0.0	0.0	0.0	0.0	3.8	0.0	0.0	42.0	0.0	195.4	
<i>Others Watford</i>	0.0	2.0	0.0	0.8	0.0	0.0	0.0	0.5	0.0	0.4	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.1	
Sub-total Watford	66.0	41.7	4.5	1.9	4.0	0.6	7.8	12.0	3.8	8.7	0.8	2.0	0.0	0.0	0.0	0.0	0.0	3.8	0.0	0.0	42.0	0.0	199.6	
Bushey	4.9	1.0	15.3	1.0	0.6	0.0	0.0	1.8	0.4	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.7	0.0	0.0	2.8	0.0	31.1	
Radlett	3.8	0.5	1.4	9.4	7.6	0.9	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	7.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	31.9
Borehamwood	0.0	0.0	0.3	1.5	19.1	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	2.8	0.0	23.7	
Potters Bar	0.0	0.0	0.0	0.3	0.0	29.2	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	9.7	0.0	0.0	0.0	0.0	0.0	5.7	0.0	45.4	
<i>Others Hertsmere</i>	0.0	0.5	0.3	1.8	1.7	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	4.9	
Sub-total Hertsmere	8.7	2.0	17.3	14.0	28.9	30.8	0.0	1.8	0.4	1.0	0.0	0.5	0.0	0.0	7.7	9.7	0.0	2.7	0.0	0.0	11.4	0.0	137.0	
Rickmansworth	4.6	0.5	0.0	0.0	0.0	0.0	22.2	1.3	8.5	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.4	0.0	0.0	0.0	0.0	42.8	
<i>Others Three Rivers</i>	4.1	6.1	0.6	0.0	1.1	0.0	9.0	3.1	5.4	7.0	0.8	0.6	0.0	0.0	1.4	0.0	0.0	0.0	0.0	0.0	2.8	0.0	42.1	
Sub-total Three Rivers	8.6	6.6	0.6	0.0	1.1	0.0	31.3	4.4	13.9	7.4	0.8	0.6	0.0	0.0	1.4	0.0	0.0	5.4	0.0	0.0	2.8	0.0	84.9	
Hemel Hempstead	0.0	0.0	0.4	0.0	0.0	0.0	0.4	0.0	0.9	5.3	55.1	23.2	4.5	0.9	9.2	0.0	0.6	0.0	2.7	0.0	0.0	0.0	103.3	
Berkhamsted	0.0	0.5	0.0	0.2	0.0	0.0	0.0	0.0	0.3	4.7	1.5	6.1	31.6	4.8	0.0	0.0	0.0	14.5	7.8	0.0	3.1	0.0	75.1	
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	2.1	12.0	0.0	0.0	0.0	7.9	3.9	0.0	0.0	0.0	27.5	
<i>Others Dacorum</i>	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.8	1.6	13.4	1.6	0.4	0.0	1.4	0.0	0.0	2.7	0.7	4.4	0.0	0.0	27.4	
Sub-total Dacorum	0.0	1.5	0.4	0.2	0.0	0.0	0.4	0.0	2.0	11.6	71.1	30.8	38.6	17.7	10.6	0.0	0.6	2.7	25.7	16.1	0.0	3.1	233.2	
St Albans	0.0	2.5	0.3	4.1	2.6	2.8	0.3	0.6	0.3	2.7	8.1	0.9	0.4	0.0	106.9	12.5	7.0	0.0	0.7	0.0	0.0	5.7	158.5	
Harpenden	0.0	0.0	0.0	0.2	0.0	0.5	0.0	0.0	0.0	0.4	0.0	0.9	0.0	0.0	10.6	0.0	43.6	0.0	0.0	1.9	0.0	4.9	63.1	
<i>Others St Albans</i>	0.8	0.5	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	1.8	0.5	0.0	0.0	10.1	5.4	2.6	0.0	0.0	0.0	2.9	0.0	24.8	
Sub-total St Albans	0.8	3.0	0.3	4.3	2.6	3.2	0.6	0.3	3.1	9.9	2.4	0.4	0.0	127.6	17.8	53.2	0.0	0.7	1.9	0.0	13.5	0.0	246.3	
Sub-total Authority Areas	84.1	54.8	23.1	20.4	36.7	34.7	40.1	18.8	20.5	31.8	82.6	36.4	39.0	17.7	147.4	27.6	53.7	14.6	26.4	18.0	56.2	16.6	901.0	
Central London	4.1	8.1	6.9	1.9	5.7	0.9	3.9	7.7	3.6	1.6	11.7	7.8	1.7	2.3	17.0	4.9	3.6	13.9	3.6	7.7	18.0	3.9	140.3	
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	19.5	0.0	0.0	0.0	0.0	19.5	
Harrow	3.0	2.0	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	37.9	0.0	0.0	9.8	0.0	53.7	
Hatch End	0.0	5.6	0.6	0.0	1.1	0.0	0.0	4.8	1.3	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	40.9	0.0	0.0	23.7	0.0	78.4	
Pinner	0.0	0.0	0.3	0.0	0.0	0.0	0.3	0.9	1.3	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	35.8	0.0	0.0	4.0	0.0	43.0	
Ruislip	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.5	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	44.3	0.0	0.0	0.0	0.0	45.5	
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	2.0	0.0	0.0	0.0	0.0	32.3	0.0	1.5	35.8	
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	44.0	0.0	0.0	44.2	
Northwood	0.8	0.5	0.0	0.0	0.0	0.0	1.2	13.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	18.2	0.0	0.0	0.0	0.0	34.5	
Barnet	0.0	0.0	0.0	0.3	2.8	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	40.3	0.0	44.0	
Stanmore	0.0	0.5	1.8	0.0	1.2	0.0	0.0	5.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	36.4	0.0	46.4	
Aylesbury	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.6	1.5	1.3	0.0	0.0	0.0	10.4	3.8	0.0	0.0	0.0	18.3	
Hatfield	0.0	0.0	0.0	0.8	0.6	0.5	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	1.4	11.0	0.6	0.0	0.0	0.0	11.9	0.0	27.2	
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	0.0	34.4	0.0	35.6	
Uxbridge	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	17.8	0.0	0.0	0.0	0.0	20.0	
Welwyn Garden City	0.0	0.0	0.0	0.0	0.0	1.4	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	2.0	2.8	0.6	0.0	0.0	0.0	0.0	37.8	44.9	
<i>Others Outside Authority Areas</i>	2.8	1.2	2.9	2.6	6.0	3.0	1.6	1.3	6.0	2.4	3.0	13.2	5.4	2.4	2.9	13.8	5.0	53.2	34.2	38.9	48.6	31.2	281.7	
Total	94.9	73.0	35.8	26.1	55.1	40.8	47.2	56.2	33.1	38.4	97.3	58.5	47.6	24.0	172.5	59.9	63.6	296.1	74.6	144.7	271.5	102.9	1,913.9	

Notes:

a. Table 3 x Table 4

2016 Prices

Table 8: Food and Drink Expenditure @ 2031 (£m) (Scenario 2)

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	72.6	43.6	5.0	1.2	4.4	0.7	8.5	12.6	4.2	9.1	0.9	1.8	0.0	0.0	0.0	0.0	0.0	4.2	0.0	0.0	46.4	0.0	215.0	
Others Watford	0.0	2.2	0.0	0.9	0.0	0.0	0.0	0.5	0.0	0.4	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.5	
Sub-total Watford	72.6	45.8	5.0	2.1	4.4	0.7	8.5	13.1	4.2	9.5	0.9	2.3	0.0	0.0	0.0	0.0	0.0	4.2	0.0	0.0	46.4	0.0	219.6	
Bushey	5.4	1.1	16.9	1.1	0.6	0.0	0.0	1.9	0.5	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.0	0.0	0.0	3.2	0.0	34.3	
Radlett	4.2	0.5	1.6	10.4	8.4	1.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	8.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	35.2
Borehamwood	0.0	0.0	0.3	1.6	21.1	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	3.2	0.0	26.2	
Potters Bar	0.0	0.0	0.0	0.3	0.0	32.3	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	10.7	0.0	0.0	0.0	0.0	0.0	6.3	0.0	50.2	
Others Hertsmere	0.0	0.6	0.3	2.0	1.8	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	5.4	
Sub-total Hertsmere	9.6	2.2	19.1	15.5	32.0	34.1	0.0	1.9	0.5	1.1	0.0	0.5	0.0	0.0	8.5	10.7	0.0	3.0	0.0	0.0	12.6	0.0	151.2	
Rickmansworth	5.0	0.6	0.0	0.0	0.0	0.0	24.3	1.5	9.2	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.9	0.0	0.0	0.0	0.0	46.9	
Others Three Rivers	4.5	6.7	0.6	0.0	1.2	0.0	9.9	3.3	5.9	7.7	0.9	0.7	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	3.2	0.0	46.1	
Sub-total Three Rivers	9.5	7.2	0.6	0.0	1.2	0.0	34.1	4.8	15.2	8.1	0.9	0.7	0.0	0.0	1.5	0.0	0.0	5.9	0.0	0.0	3.2	0.0	93.0	
Hemel Hempstead	0.0	0.0	0.4	0.0	0.0	0.0	0.5	0.0	1.0	5.7	61.2	25.7	5.0	1.0	10.1	0.0	0.6	3.0	0.0	0.0	0.0	0.0	114.3	
Berkhamsted	0.0	0.6	0.0	0.2	0.0	0.0	0.0	0.3	5.1	1.7	6.7	35.1	5.3	0.0	0.0	0.0	0.0	15.9	8.6	0.0	3.4	0.0	83.1	
Tring	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0	2.3	13.3	0.0	0.0	0.0	8.7	4.3	0.0	0.0	0.0	30.4	
Others Dacorum	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.8	1.8	14.9	1.8	4.4	0.0	1.5	0.0	0.0	3.0	0.7	4.9	0.0	0.0	0.0	30.3	
Sub-total Dacorum	0.0	1.7	0.4	0.2	0.0	0.0	0.5	0.0	2.2	12.6	78.9	34.2	42.9	19.7	11.6	0.0	0.6	3.0	28.2	17.9	0.0	3.4	0.0	258.1
St Albans	0.0	2.8	0.3	4.5	2.9	3.1	0.4	0.7	0.3	3.0	9.0	1.1	0.4	0.0	117.4	13.7	7.7	0.0	0.7	0.0	0.0	6.4	174.2	
Harpden	0.0	0.0	0.0	0.2	0.0	0.5	0.0	0.0	0.0	0.4	0.0	1.1	0.0	0.0	11.7	0.0	47.9	0.0	0.0	2.2	0.0	5.4	69.3	
Others St Albans	0.9	0.6	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	2.0	0.5	0.0	0.0	11.1	5.9	2.8	0.0	0.0	0.0	0.0	3.2	27.3	
Sub-total St Albans	0.9	3.3	0.3	4.8	2.9	3.6	0.7	0.3	3.4	11.0	2.6	0.4	0.0	0.0	140.1	19.6	58.4	0.0	0.7	2.2	0.0	15.0	270.9	
Sub-total Authority Areas	92.5	60.2	25.5	22.5	40.5	38.3	43.8	20.5	22.4	34.7	91.7	40.4	43.3	19.7	161.8	30.3	59.0	16.0	28.9	20.0	62.2	18.4	992.7	
Central London	4.5	8.9	7.6	2.1	6.3	1.0	4.3	8.4	4.0	1.8	13.0	8.6	1.9	2.6	18.6	5.3	3.9	15.3	3.9	8.5	19.9	4.3	154.7	
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	21.5	0.0	0.0	0.0	0.0	21.5	
Harrow	3.4	2.2	0.0	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	41.8	0.0	0.0	10.9	0.0	59.1	
Hatch End	0.0	6.1	0.6	0.0	1.2	0.0	0.0	5.2	1.4	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	45.0	0.0	0.0	26.3	0.0	86.3	
Pinner	0.0	0.0	0.3	0.0	0.0	0.0	0.4	1.0	1.4	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	39.4	0.0	0.0	4.4	0.0	47.3	
Ruislip	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.5	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	48.8	0.0	0.0	0.0	0.0	50.0	
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	2.1	0.0	0.0	0.0	0.0	35.9	0.0	1.7	39.8	
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	0.2	0.0	0.0	0.0	0.0	0.0	0.0	48.9	0.0	0.0	49.1	
Northwood	0.9	0.6	0.0	0.0	0.0	0.0	1.3	15.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	20.0	0.0	0.0	0.0	0.0	37.8	
Barnet	0.0	0.0	0.0	0.4	3.1	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	44.6	0.0	48.6	
Stanmore	0.0	0.5	2.0	0.0	1.3	0.0	0.0	5.5	0.0	1.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	40.3	0.0	51.2	
Aylesbury	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.7	1.6	1.4	0.0	0.0	0.0	0.0	0.0	11.4	4.2	0.0	0.0	20.2	
Hatfield	0.0	0.0	0.0	0.9	0.6	0.5	0.0	0.0	0.0	0.0	0.5	0.0	0.0	1.5	12.0	0.7	0.0	0.0	0.0	0.0	13.2	0.0	30.0	
Mill Hill	0.0	0.0	0.0	0.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	38.1	0.0	39.4	
Uxbridge	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	19.5	0.0	0.0	0.0	0.0	21.9	
Welwyn Garden City	0.0	0.0	0.0	0.0	0.0	1.5	0.0	0.5	0.0	0.0	0.0	0.0	0.0	2.1	3.0	0.7	0.0	0.0	0.0	0.0	0.0	41.9	49.8	
Others Outside Authority Areas	3.1	1.3	3.3	2.9	6.6	3.3	1.7	1.4	6.6	2.7	3.4	14.7	6.0	2.7	3.1	15.1	5.5	58.5	37.5	43.3	53.8	34.6	311.0	
Total	104.3	80.3	39.6	28.9	61.0	45.2	51.5	61.4	36.2	42.0	108.0	64.9	52.9	26.6	189.4	65.8	69.8	325.9	81.7	160.9	300.5	114.2	2,110.7	

Notes:

a. Table 3 x Table 4

2016 Prices

Table 9: Food and Drink Expenditure @ 2036 (£m) (Scenario 2)

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	79.7	47.9	5.5	1.3	4.9	0.8	9.2	13.8	4.6	9.9	1.0	1.9	0.0	0.0	0.0	0.0	0.0	4.5	0.0	0.0	51.2	0.0	236.1	
Others Watford	0.0	2.4	0.0	1.0	0.0	0.0	0.0	0.5	0.0	0.5	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.0	
Sub-total Watford	79.7	50.3	5.5	2.3	4.9	0.8	9.2	14.3	4.6	10.3	1.0	2.5	0.0	0.0	0.0	0.0	0.0	4.5	0.0	0.0	51.2	0.0	241.1	
Bushey	5.9	1.2	18.7	1.3	0.7	0.0	0.0	2.1	0.5	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2	0.0	0.0	3.5	0.0	37.7	
Radlett	4.6	0.6	1.7	11.5	9.2	1.1	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	9.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	38.7
Borehamwood	0.0	0.0	0.4	1.8	23.3	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	3.5	0.0	28.9	
Potters Bar	0.0	0.0	0.0	0.3	0.0	35.7	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	11.7	0.0	0.0	0.0	0.0	0.0	7.0	0.0	55.3	
Others Hertsmere	0.0	0.6	0.3	2.2	2.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.0	
Sub-total Hertsmere	10.5	2.4	21.1	17.1	35.3	37.6	0.0	2.1	0.5	1.2	0.0	0.6	0.0	0.0	9.3	11.7	0.0	3.2	0.0	0.0	13.9	0.0	166.6	
Rickmansworth	5.5	0.6	0.0	0.0	0.0	0.0	26.5	1.6	10.1	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.5	0.0	0.0	0.0	0.0	51.2	
Others Three Rivers	4.9	7.3	0.7	0.0	1.4	0.0	10.8	3.6	6.5	8.4	1.0	0.8	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	3.5	0.0	50.5	
Sub-total Tree Rivers	10.4	7.9	0.7	0.0	1.4	0.0	37.2	5.2	16.6	8.8	1.0	0.8	0.0	0.0	1.7	0.0	0.0	6.5	0.0	0.0	3.5	0.0	101.7	
Hemel Hempstead	0.0	0.0	0.5	0.0	0.0	0.0	0.5	0.0	1.1	6.3	67.8	28.5	5.6	1.1	11.1	0.0	0.7	0.0	3.2	0.0	0.0	0.0	126.4	
Berkhamsted	0.0	0.6	0.0	0.3	0.0	0.0	0.0	0.0	0.4	5.6	1.9	7.5	38.9	5.9	0.0	0.0	0.0	0.0	17.3	9.5	0.0	3.8	91.7	
Tring	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.3	0.0	2.6	14.8	0.0	0.0	0.0	0.0	9.5	4.8	0.0	0.0	33.5	
Others Dacorum	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.9	1.9	16.5	1.9	0.5	0.0	1.7	0.0	0.0	3.2	0.8	5.5	0.0	0.0	33.5	
Sub-total Dacorum	0.0	1.8	0.5	0.0	0.0	0.0	0.5	0.0	2.4	13.8	87.5	37.9	47.5	21.8	12.8	0.0	0.7	3.2	30.8	19.8	0.0	3.8	285.1	
St Albans	0.0	3.0	0.4	5.0	3.2	3.4	0.4	0.7	0.4	3.3	10.0	1.2	0.5	0.0	128.8	15.0	8.4	0.0	0.8	0.0	0.0	7.0	191.3	
Harpenden	0.0	0.0	0.0	0.3	0.0	0.6	0.0	0.0	0.0	0.5	0.0	1.2	0.0	0.0	12.8	0.0	52.5	0.0	0.0	2.4	0.0	6.0	76.1	
Others St Albans	0.9	0.6	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	2.2	0.6	0.0	0.0	12.2	6.5	3.1	0.0	0.0	0.0	3.5	30.0		
Sub-total St Albans	0.9	3.6	0.4	5.3	3.2	3.9	0.8	0.7	0.4	3.7	12.2	2.9	0.5	0.0	153.7	21.5	64.0	0.0	0.8	2.4	0.0	16.5	297.4	
Sub-total Authority Areas	101.5	66.1	28.2	24.9	44.7	42.3	47.8	22.4	24.4	37.9	101.6	44.7	48.0	21.8	177.5	33.2	64.7	17.5	31.6	22.1	68.6	20.3	1,091.9	
Central London	4.9	9.8	8.4	2.3	6.9	1.2	4.7	9.1	4.3	1.9	14.4	9.6	2.1	2.8	20.4	5.8	4.3	16.7	4.3	9.4	21.9	4.8	170.2	
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	23.6	0.0	0.0	0.0	0.0	23.6	
Harrow	3.7	2.4	0.0	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	45.7	0.0	0.0	12.0	0.0	64.9	
Hatch End	0.0	6.7	0.7	0.0	1.4	0.0	0.0	5.7	1.6	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	49.3	0.0	0.0	29.0	0.0	94.7	
Pinner	0.0	0.0	0.4	0.0	0.0	0.0	0.4	1.0	1.6	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	43.2	0.0	0.0	4.9	0.0	51.9	
Ruislip	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.5	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	53.4	0.0	0.0	0.0	0.0	54.8	
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	2.4	0.0	0.0	0.0	0.0	39.7	0.0	1.9	43.9	
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	0.2	0.0	0.0	0.0	0.0	0.0	0.0	54.0	0.0	0.0	54.3	
Northwood	0.9	0.6	0.0	0.0	0.0	0.0	1.4	16.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	21.9	0.0	0.0	0.0	0.0	41.4	
Barnet	0.0	0.0	0.0	0.4	3.5	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	49.2	0.0	53.6	
Stanmore	0.0	0.6	2.2	0.0	1.4	0.0	0.0	6.0	0.0	1.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	44.4	0.0	56.4	
Aylesbury	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.8	1.8	1.6	0.0	0.0	0.0	0.0	12.4	4.7	0.0	0.0	0.0	22.2	
Hatfield	0.0	0.0	0.0	1.0	0.7	0.6	0.0	0.0	0.0	0.0	0.6	0.0	0.0	1.7	13.2	0.7	0.0	0.0	0.0	0.0	14.5	0.0	33.0	
Mill Hill	0.0	0.0	0.0	0.0	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	42.0	0.0	43.4	
Uxbridge	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	21.4	0.0	0.0	0.0	0.0	24.0	
Welwyn Garden City	0.0	0.0	0.0	0.0	0.0	1.7	0.0	0.5	0.0	0.0	0.0	0.0	0.0	2.4	3.3	0.7	0.0	0.0	0.0	0.0	46.2	0.0	54.8	
Others Outside Authority Areas	3.4	1.4	3.6	3.2	7.3	3.6	1.9	1.5	7.2	2.9	3.7	16.3	6.7	3.0	3.5	16.6	6.0	64.1	41.0	47.8	59.3	38.1	342.0	
Total	114.5	88.2	43.7	31.9	67.3	49.8	56.2	66.9	39.4	45.8	119.7	71.9	58.6	29.5	207.7	72.2	76.5	356.8	89.3	177.8	331.3	125.8	2,320.8	

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 2)

Destination	2017	2021	2026	2031	2036
Available Expenditure					
Watford	167.1	177.7	195.4	215.0	236.1
<i>Others Watford</i>	3.5	3.8	4.1	4.5	5.0
Sub-total Watford	170.6	181.5	199.6	219.6	241.1
Bushey	26.5	28.2	31.1	34.3	37.7
Radlett	27.2	29.0	31.9	35.2	38.7
Borehamwood	20.1	21.4	23.7	26.2	28.9
Potters Bar	38.6	41.2	45.4	50.2	55.3
<i>Others Hertsmere</i>	4.2	4.4	4.9	5.4	6.0
Sub-total Hertsmere	116.5	124.2	137.0	151.2	166.6
Rickmansworth	37.1	39.2	42.8	46.9	51.2
<i>Others Three Rivers</i>	36.3	38.5	42.1	46.1	50.5
Sub-total Tree Rivers	73.5	77.7	84.9	93.0	101.7
Hemel Hempstead	87.4	93.3	103.3	114.3	126.4
Berkhamsted	63.5	67.9	75.1	83.1	91.7
Tring	23.2	24.8	27.5	30.4	33.5
<i>Others Dacorum</i>	23.1	24.8	27.4	30.3	33.5
Sub-total Dacorum	197.2	210.7	233.2	258.1	285.1
St Albans	136.0	144.3	158.5	174.2	191.3
Harpenden	54.1	57.4	63.1	69.3	76.1
<i>Others St Albans</i>	21.3	22.6	24.8	27.3	30.0
Sub-total St Albans	211.4	224.3	246.3	270.9	297.4
Total	769.1	818.4	901.0	992.7	1,091.9

Notes:

a. Table 5-9

Table 11: Food and Drink Benchmark Turnover (£m) (Scenario 2)

Destination	2017	2021	2026	2031	2036
Benchmark Turnover					
Watford	167.1	179.6	200.8	223.9	249.6
<i>Others Watford</i>	3.5	3.8	4.3	4.7	5.3
Sub-total Watford	170.6	183.4	205.1	228.6	254.9
Bushey	26.5	28.4	31.8	35.5	39.5
Radlett	27.2	29.3	32.7	36.5	40.7
Borehamwood	20.1	21.6	24.1	26.9	30.0
Potters Bar	38.6	41.5	46.4	51.8	57.7
<i>Others Hertsmere</i>	4.2	4.5	5.0	5.6	6.2
Sub-total Hertsmere	116.5	125.3	140.1	156.2	174.1
Rickmansworth	37.1	39.9	44.6	49.8	55.5
<i>Others Three Rivers</i>	36.3	39.1	43.7	48.7	54.3
Sub-total Tree Rivers	73.5	79.0	88.3	98.5	109.8
Hemel Hempstead	87.4	93.9	105.0	117.1	130.6
Berkhamsted	63.5	68.2	76.3	85.1	94.8
Tring	23.2	24.9	27.9	31.1	34.6
<i>Others Dacorum</i>	23.1	24.9	27.8	31.0	34.6
Sub-total Dacorum	197.2	211.9	237.0	264.2	294.6
St Albans	136.0	146.2	163.5	182.3	203.3
Harpenden	54.1	58.1	65.0	72.5	80.8
<i>Others St Albans</i>	21.3	22.8	25.5	28.5	31.8
Sub-total St Albans	211.4	227.2	254.1	283.3	315.8
Total	769.1	826.8	924.5	1,030.8	1,149.2

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 2)

Destination	2017	2021	2026	2031	2036
Surplus Expenditure					
Watford	-	-1.9	-5.4	-8.9	-13.5
<i>Others Watford</i>	-	0.0	-0.1	-0.2	-0.3
Sub-total Watford	-	-1.9	-5.5	-9.1	-13.8
Bushey	-	-0.2	-0.7	-1.2	-1.8
Radlett	-	-0.3	-0.8	-1.3	-2.0
Borehamwood	-	-0.1	-0.4	-0.7	-1.1
Potters Bar	-	-0.3	-1.0	-1.6	-2.4
<i>Others Hertsmere</i>	-	0.0	-0.1	-0.2	-0.3
Sub-total Hertsmere	-	-1.1	-3.1	-5.0	-7.5
Rickmansworth	-	-0.7	-1.8	-2.9	-4.3
<i>Others Three Rivers</i>	-	-0.6	-1.6	-2.6	-3.8
Sub-total Tree Rivers	-	-1.3	-3.4	-5.5	-8.1
Hemel Hempstead	-	-0.6	-1.8	-2.8	-4.2
Berkhamsted	-	-0.4	-1.2	-2.0	-3.2
Tring	-	-0.1	-0.4	-0.7	-1.1
<i>Others Dacorum</i>	-	-0.1	-0.4	-0.7	-1.1
Sub-total Dacorum	-	-1.2	-3.8	-6.1	-9.5
St Albans	-	-1.9	-5.1	-8.1	-12.0
Harpenden	-	-0.7	-1.9	-3.1	-4.7
<i>Others St Albans</i>	-	-0.3	-0.7	-1.2	-1.8
Sub-total St Albans	-	-2.9	-7.7	-12.4	-18.4
Total	-	-8.3	-23.5	-38.0	-57.4

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 2)

Destination	2017	2021	2026	2031	2036
Sales Density (£ per sq m)	5,000	5,375	6,010	6,701	7,471
Surplus Expenditure					
Watford	-	-344.3	-894.7	-1,325.6	-1,807.1
<i>Others Watford</i>	-	-8.9	-21.2	-30.3	-40.0
Sub-total Watford	-	-353.2	-915.9	-1,355.9	-1,847.2
Bushey	-	-46.2	-121.8	-178.0	-243.2
Radlett	-	-57.2	-139.8	-198.2	-263.1
Borehamwood	-	-27.1	-74.2	-106.7	-146.3
Potters Bar	-	-62.0	-163.9	-237.0	-322.6
<i>Others Hertsmere</i>	-	-7.2	-18.0	-25.3	-33.8
Sub-total Hertsmere	-	-199.7	-517.6	-745.2	-1,009.0
Rickmansworth	-	-124.9	-295.6	-431.2	-573.3
<i>Others Three Rivers</i>	-	-111.8	-265.2	-384.3	-509.1
Sub-total Tree Rivers	-	-236.6	-560.8	-815.5	-1,082.4
Hemel Hempstead	-	-112.0	-296.6	-412.2	-557.0
Berkhamsted	-	-67.6	-196.9	-294.4	-423.7
Tring	-	-22.6	-68.3	-104.6	-152.8
<i>Others Dacorum</i>	-	-19.6	-63.5	-97.1	-142.9
Sub-total Dacorum	-	-221.8	-625.3	-908.3	-1,276.4
St Albans	-	-351.8	-841.9	-1,206.6	-1,603.1
Harpenden	-	-132.8	-322.6	-466.8	-627.6
<i>Others St Albans</i>	-	-49.7	-121.3	-174.7	-235.4
Sub-total St Albans	-	-534.3	-1,285.8	-1,848.1	-2,466.2
Total	-	-1,545.6	-3,905.3	-5,673.1	-7,681.2

Notes:

a. Table 12

2016 Prices