RECAP

The Retail Capacity forecasting Model

Project:	**Dacorum Retail Study Update**	Number:	143668
Client:	Dacorum Borough Council		
Date of Latest Revision:	23-Mar-09	File:	Dacorum RECAP Model 2008 (Eastern Growth)

Retail Locations Modelled:	Hemel Hempstead Town Centre
	Non-central shopping in Hemel Hempstead
	Berkhamsted
	Tring (including Tesco)

Scenarios Modelled:	1	Baseline - Market Shares indicated by the Household Interview Survey 2008 remain unchanged.
	2	Increase in market shares of convenience and comparison goods expenditure attracted to Hemel Hempstead Town Centre from 2016 due to Waterside Square; and reductions in market shares of convenience goods expenditure attracted to Non-central main foodstores. Increase in comparison goods expenditure attracted to non-central retail warehouses due to committed Jarman Park development.

Notes:

Catchment Area Population and Expenditure

Table: **1**

CATCHMENT AREA POPULATION FORECASTS **Eastern Expansion of Hemel Hempstead**

Zone	Postcodes	Base Year	Forecasting Years			
		2008	2011	2016	2021	2031
1	HP1-1, HP2-4, HP2-5, HP2-7, HP3-8, HP3-9	59,945	62,556	69,133	75,711	88,865
2	HP3-0, WD4-8, WD4-9, WD5-0	28,402	28,902	29,022	29,233	29,617
3	HP1-2, HP1-3, HP2-6	24,619	25,145	25,543	25,942	26,738
4	AL3-7, AL3-8	9,269	9,403	9,487	9,631	9,893
5	HP4-1, HP4-2, HP4-3	22,574	22,890	23,343	23,796	24,701
6	HP5-1, HP5-2, HP5-3	24,665	24,838	24,622	24,622	24,530
7	HP23-4, HP23-5, HP23-6	17,671	17,822	17,997	18,172	18,522
8	HP22-5, HP22-6	19,408	19,587	19,708	19,905	20,266
TOTAL		206,553	211,143	218,855	227,012	243,132

Sources:

Pitney Bowes Mapinfo Ltd - Anysite Report, 6th August 2008.
Dacorum Borough Council for above-trend forecasts.

Notes:

Based on Mapinfo population forecasts to 2016 extrapolated by trend projection to 2031; with above-trend growth added based on RSS housing growth trajectory for Scenario 1 - Eastern Expansion.

Table: **2**

PER CAPITA EXPENDITURE

Per Capita Expenditure in (year):	2005	Price Basis (Year):	2005
Including Special Forms of Trading:			
Convenience Goods (£):	1,703.00	Comparison Goods (£):	3,334.00

GROWTH IN PER CAPITA RETAIL EXPENDITURE:

Convenience Goods:	3.45	% 2005 to	2007	0.00	% pa 2008 to 2009	1.00	% pa	2010 to	2031
Comparison Goods:	11.74	% 2005 to	2007	0.00	% pa 2008 to 2009	3.90	% pa	2010 to	2031

PER CAPITA EXPENDITURE IN	Convenience Goods (£)					Comparison Goods (£)				
	2008	2011	2016	2021	2031	2008	2011	2016	2021	2031
(Including SFT)	1,761.75	1,797.16	1,888.84	1,985.19	2,192.88	3,725.41	4,021.66	4,869.49	5,896.05	8,644.03
Deduction for SFT (%)	4.0	5.0	6.0	7.0	8.0	7.0	12.0	13.0	14.0	15.0
Excluding SFT	**1,691.28**	**1,707.31**	**1,775.51**	**1,846.22**	**2,017.45**	**3,464.63**	**3,539.06**	**4,236.45**	**5,070.60**	**7,347.43**

COMPARISON GOODS PER CAPITA EXPENDITURE BY GOODS TYPE

Per Capita Comparison Goods Expenditure in 2005

	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden prdcts	Chemists, medcl & beauty goods	All other comprsn gds	Total comprsn gds
Including SFT (£)	788	323	114	102	445	271	424	867	3,334

Per Capita Comparison Goods Expenditure in 2008

	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden prdcts	Chemists, medcl & beauty goods	All other comprsn gds	Total comprsn gds
Including SFT	880.51	360.92	127.38	113.97	497.24	302.82	473.78	968.79	3,725.41
Deduction for SFT (%)	8.1	4.4	10.1	7.1	12.2	5.8	2.0	6.7	7.0
Excluding SFT (£)	809.19	345.04	114.52	105.88	436.58	285.25	464.30	903.88	3,464.63

Sources:

MapInfo Anysite Report, 16/10/2008. MapInfo/Oxford Economic Forecasting Information Brief 08/2.
DTZ estimates for SFT based on 'UK e-retail 2008', Verdict Research Limited.

Notes:

Growth 2005 to 2007 is the actual national average growth. No growth is assumed during 2008 and 2009 owing to the current economic recession. Growth projections 2010 to 2026 apply the 1998 to 2007 average annual trend to the projected 2009 expenditure (convenience goods); and the ultra-long term average annual trend 1964 to 2007 to the projected 2009 expenditure (comparison goods).

Table: **3**

CATCHMENT AREA EXPENDITURE FORECASTS

Catchment Zone	TOTAL RETAIL EXPENDITURE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (£000)	2011 (£000)	2016 (£000)	2021 £0	2031 (£000)	2008 (£000)	2011 (£000)	2016 (£000)	2021 £0	2031 (£000)
1	101,384	106,802	122,746	139,780	179,281	207,687	221,389	292,879	383,900	652,929
2	48,036	49,345	51,529	53,971	59,751	98,403	102,286	122,950	148,231	217,609
3	41,638	42,930	45,352	47,895	53,943	85,296	88,990	108,212	131,541	196,455
4	15,677	16,054	16,844	17,780	19,958	32,114	33,278	40,191	48,833	72,685
5	38,179	39,080	41,446	43,933	49,833	78,211	81,009	98,892	120,660	181,489
6	41,716	42,406	43,717	45,458	49,488	85,455	87,903	104,310	124,849	180,231
7	29,887	30,428	31,954	33,550	37,367	61,224	63,073	76,243	92,143	136,089
8	32,824	33,441	34,992	36,749	40,887	67,242	69,320	83,492	100,930	148,906
TOTALS	349,340	360,486	388,579	419,116	490,507	715,630	747,248	927,169	1,151,088	1,786,394

Sources: RECAP Tables 1 and 2

Table: **4**

CATCHMENT AREA COMPARISON GOODS EXPENDITURE BY GOODS TYPE IN 2008

Catchment Zone	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden prdcts (£000)	Chemists, medcl & beauty goods (£000)	All other comprsn gds (£000)	Total comprsn gds (£000)
1	48,507	20,683	6,865	6,347	26,171	17,099	27,833	54,183	207,687
2	22,983	9,800	3,253	3,007	12,400	8,102	13,187	25,672	98,403
3	19,921	8,495	2,819	2,607	10,748	7,023	11,431	22,253	85,296
4	7,500	3,198	1,061	981	4,047	2,644	4,304	8,378	32,114
5	18,267	7,789	2,585	2,390	9,855	6,439	10,481	20,404	78,211
6	19,959	8,510	2,825	2,612	10,768	7,036	11,452	22,294	85,455
7	14,299	6,097	2,024	1,871	7,715	5,041	8,205	15,972	61,224
8	15,705	6,697	2,223	2,055	8,473	5,536	9,011	17,542	67,242
TOTALS	167,141	71,269	23,654	21,870	90,177	58,920	95,903	186,699	715,630

Sources: RECAP Tables 1 and 2

Scenario 1

Hemel Hempstead Town Centre

Table: **5**

CONVENIENCE GOODS MARKET SHARES IN 2008

2008 Allocations to

Hemel Hempstead Town Centre
Indicated by Household Interview Survey

Zones	Main Food	Top-up convenience	**WEIGHTED AVERAGE**
	Q1	Q4	
	Expenditure weighting		
	75	25	100
	(%)	(%)	(%)
1	19.0	16.3	18.3
2	5.3	4.0	5.0
3	32.5	11.9	27.4
4	2.0	2.0	2.0
5	3.3	1.3	2.8
6	0.7	1.3	0.9
7	2.4	-	1.8
8	-	0.8	0.2

Sources: Household Interview Survey.
Expenditure weighting by DTZ.

Table: **6**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2008

2008 Allocations to
Hemel Hempstead Town Centre
Indicated by Household Interview Survey

Zones	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	**WEIGHTED AVERAGE**
	Q5	Q6	Q7	Q8	Q9	Q10	Q11	Q12	
	Expenditure weighting								
	880.51	360.92	127.38	113.97	497.24	302.82	473.78	968.79	3,725.41
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	55.4	17.9	35.1	23.6	22.2	38.2	69.1	62.6	47.9
2	21.0	9.5	10.8	9.5	9.7	22.0	16.8	19.6	16.9
3	64.4	28.7	45.3	34.1	30.9	45.2	77.6	68.4	56.0
4	20.7	5.9	8.1	3.8	2.7	5.8	6.3	15.3	11.5
5	36.1	13.6	21.2	24.8	28.4	26.7	4.1	9.7	20.3
6	38.2	12.3	16.1	12.3	16.5	10.6	2.0	17.6	19.0
7	24.3	7.6	16.8	8.7	7.3	7.1	8.3	15.3	13.9
8	5.4	-	3.7	-	-	-	-	2.5	2.1

Sources: Household Interview Survey.
RECAP Table 2 for expenditure weights.

Table: **7**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Hemel Hempstead Town Centre**

Baseline - Market Shares indicated by the Household Interview Survey 2008 remain unchanged.

Market shares correction factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2031 (%)	2008 (%)	2011 (%)	2016 (%)	2021	2031 (%)
1	18	18	18	18	18	48	48	48	48	48
2	5	5	5	5	5	17	17	17	17	17
3	27	27	27	27	27	56	56	56	56	56
4	2	2	2	2	2	11	11	11	11	11
5	3	3	3	3	3	20	20	20	20	20
6	1	1	1	1	1	19	19	19	19	19
7	2	2	2	2	2	14	14	14	14	14
8	0	0	0	0	0	2	2	2	2	2

Sources: RECAP Model.
DTZ for market share corrections.

Table: **8**

COMPARISON GOODS SALES BY GOODS TYPE IN 2008

Catchment Zones	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
	2008 Sales in **Hemel Hempstead Town Centre** By Comparison Goods Type.							
1	26,873	3,702	2,410	1,498	5,810	6,532	19,232	33,919
2	4,826	931	351	286	1,203	1,782	2,215	5,032
3	12,829	2,438	1,277	889	3,321	3,174	8,870	15,221
4	1,553	189	86	37	109	153	271	1,282
5	6,594	1,059	548	593	2,799	1,719	430	1,979
6	7,624	1,047	455	321	1,777	746	229	3,924
7	3,475	463	340	163	563	358	681	2,444
8	848	0	82	0	0	0	0	439
TOTALS	64,622	9,829	5,549	3,787	15,582	14,465	31,929	64,238
MARKET SHARES	39%	14%	23%	17%	17%	25%	33%	34%

Sources: RECAP Model.

Table: **9**

FORECAST RETAIL SALES

Scenario: 1 Location: **Hemel Hempstead Town Centre**

Baseline - Market Shares indicated by the Household Interview Survey 2008 remain unchanged.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE CONVENIENCE GOODS 2008 (£000)	2011 (£000)	2016 (£000)	2021 £0	2031 (£000)	COMPARISON GOODS 2008 (£000)	2011 (£000)	2016 (£000)	2021 £0	2031 (£000)
1	18,249	19,224	22,094	25,160	32,271	99,690	106,267	140,582	184,272	313,406
2	2,402	2,467	2,576	2,699	2,988	16,728	17,389	20,902	25,199	36,994
3	11,242	11,591	12,245	12,932	14,565	47,766	49,834	60,599	73,663	110,015
4	314	321	337	356	399	3,533	3,661	4,421	5,372	7,995
5	1,145	1,172	1,243	1,318	1,495	15,642	16,202	19,778	24,132	36,298
6	417	424	437	455	495	16,236	16,702	19,819	23,721	34,244
7	598	609	639	671	747	8,571	8,830	10,674	12,900	19,052
8	0	0	0	0	0	1,345	1,386	1,670	2,019	2,978
TOTALS	34,367	35,809	39,572	43,590	52,959	209,511	220,270	278,444	351,278	560,982

Sources: RECAP Model.

Table: 10

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2008

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Asda - Hillfield Road, Hemel Hempstead. HP2 4AA	1,974	75	1,481	14,410	21,334
Iceland - Hillfield Road, Hemel Hempstead. HP2 4AB	720	94	677	5,291	3,581
Marks & Spencer - 237 Marlowes, Hemel Hempstead. HP1 1BL	984	92	905	12,013	10,875
Other food convenience goods stores in Hemel Hempstead Town Centre	1,268	95	1,204	5,000	6,021
ALL STORES	4,946		4,267	9,799	41,811

Sources: IGD and Goad

Table: 11

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
ALL STORES	-		-	#DIV/0!	-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
ALL STORES AND SCHEMES	-		-	#DIV/0!	-

Sources: DTZ, based on Verdict Research and Retail Rankings.

Table: **12**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Hemel Hempstead Town Centre**

Baseline - Market Shares indicated by the Household Interview Survey 2008 remain unchanged.

Growth in sales per sq m from shop floorspace existing in 2008 Comparison Goods: 1.50 % pa 2011 to 2031

	CONVENIENCE GOODS					COMPARISON GOODS				
	2008	2011	2016	2021	2031	2008	2011	2016	2021	2031
Residents' Spending £000	34,367	35,809	39,572	43,590	52,959	209,511	220,270	278,444	351,278	560,982
Plus visitors' spending (%)										
Total spending (£000)	34,367	35,809	39,572	43,590	52,959	209,511	220,270	278,444	351,278	560,982
Existing shop floorspace (sq m net)	4,267	4,267	4,267	4,267	4,267	40,184	40,184	40,184	40,184	40,184
Sales per sq m net (£)	8,055	9,799	9,799	9,799	9,799	5,214	5,214	5,617	6,051	7,022
Sales from extg flrspce (£000)	34,367	41,811	41,811	41,811	41,811	209,511	209,511	225,703	243,146	282,181
Available spending to support new shops (£000)	0	(6,002)	(2,238)	1,779	11,148	0	10,759	52,741	108,132	278,801
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	(6,002)	(2,238)	1,779	11,148	0	10,759	52,741	108,132	278,801
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	5,000	5,228	5,632	6,068	7,042
Capacity for new shop flrspc (sq m net)	**0**	**(500)**	**(187)**	**148**	**929**	**0**	**2,058**	**9,364**	**17,821**	**39,592**

Market Share of Catchment Area Expenditure	9.8%	9.9%	10.2%	10.4%	10.8%	29.3%	29.5%	30.0%	30.5%	31.4%

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 1

Non-central shopping in Hemel Hempstead

Table: **13**

CONVENIENCE GOODS MARKET SHARES IN 2008

2008 Allocations to **Non-central shopping in Hemel Hempstead** Indicated by Household Interview Survey			
Zones	Main Food Q1	Top-up convenience Q4	**WEIGHTED AVERAGE**
	Expenditure weighting		
	75	25	100
	(%)	(%)	(%)
1	72.3	33.0	62.5
2	44.4	11.9	36.3
3	57.6	42.4	53.8
4	24.0	7.0	19.8
5	8.0	1.3	6.3
6	-	-	0.0
7	2.4	-	1.8
8	0.8	-	0.6

Sources: Household Interview Survey.
Expenditure weighting by DTZ.

Table: **14**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2008

	2008 Allocations to **Non-central shopping in Hemel Hempstead** Indicated by Household Interview Survey								
	Clothing & footwear Q5	Furniture/ florcvrgs etc Q6	Household Textiles Q7	Household Appliances Q8	Audio-visual equipment Q9	Hardware, DIY, garden products Q10	Chemists, medcl & beauty goods Q11	All other comparison gds Q12	**WEIGHTED AVERAGE**
Zones	Expenditure weighting								
	880.51	360.92	127.38	113.97	497.24	302.82	473.78	968.79	3,725.41
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	4.8	22.2	30.2	55.1	50.6	53.6	16.5	5.9	20.7
2	1.4	8.6	20.8	24.6	23.4	34.6	6.3	3.7	10.3
3	3.7	16.0	22.7	49.2	43.1	51.1	6.3	7.7	17.4
4	-	4.4	3.5	12.7	10.7	9.3	4.2	4.2	4.7
5	0.8	8.7	12.7	27.3	23.3	29.8	-	0.9	8.1
6	0.8	8.5	8.5	11.5	9.1	8.3	-	1.7	4.0
7	0.9	1.1	5.0	9.7	9.4	10.6	-	2.4	3.5
8	-	1.1	1.9	-	1.0	-	-	-	0.3

Sources: Household Interview Survey.
RECAP Table 2 for expenditure weights.

Table: **15**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Non-central shopping in Hemel Hempstead**

Baseline - Market Shares indicated by the Household Interview Survey 2008 remain unchanged.

Market shares correction factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2031 (%)	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2031 (%)
1	62	62	62	62	62	21	21	21	21	21
2	36	36	36	36	36	10	10	10	10	10
3	54	54	54	54	54	17	17	17	17	17
4	20	20	20	20	20	5	5	5	5	5
5	6	6	6	6	6	8	8	8	8	8
6	0	0	0	0	0	4	4	4	4	4
7	2	2	2	2	2	4	4	4	4	4
8	1	1	1	1	1	0	0	0	0	0

Sources: RECAP Model.
DTZ for market share corrections.

Table: **16**

COMPARISON GOODS SALES BY GOODS TYPE IN 2008

Catchment Zones	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
	2008 Sales in **Non-central shopping in Hemel Hempstead** By Comparison Goods Type.							
1	2,328	4,592	2,073	3,497	13,242	9,165	4,592	3,197
2	322	843	677	740	2,902	2,803	831	950
3	737	1,359	640	1,283	4,632	3,589	720	1,713
4	0	141	37	125	433	246	181	352
5	146	678	328	653	2,296	1,919	0	184
6	160	723	240	300	980	584	0	379
7	129	67	101	181	725	534	0	383
8	0	74	42	0	85	0	0	0
TOTALS	3,822	8,476	4,139	6,779	25,296	18,840	6,324	7,158
MARKET SHARES	2%	12%	17%	31%	28%	32%	7%	4%

Sources: RECAP Model.

Table: **17**

FORECAST RETAIL SALES

Scenario: 1 Location: **Non-central shopping in Hemel Hempstead**

Baseline - Market Shares indicated by the Household Interview Survey 2008 remain unchanged.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (£000)	2011 (£000)	2016 (£000)	2021 £0	2031 (£000)	2008 (£000)	2011 (£000)	2016 (£000)	2021 £0	2031 (£000)
1	62,858	66,217	76,103	86,663	111,154	43,614	46,492	61,505	80,619	137,115
2	17,293	17,764	18,550	19,430	21,510	9,840	10,229	12,295	14,823	21,761
3	22,484	23,182	24,490	25,863	29,129	14,500	15,128	18,396	22,362	33,397
4	3,135	3,211	3,369	3,556	3,992	1,606	1,664	2,010	2,442	3,634
5	2,291	2,345	2,487	2,636	2,990	6,257	6,481	7,911	9,653	14,519
6	0	0	0	0	0	3,418	3,516	4,172	4,994	7,209
7	598	609	639	671	747	2,449	2,523	3,050	3,686	5,444
8	328	334	350	367	409	0	0	0	0	0
TOTALS	108,987	113,662	125,988	139,187	169,931	81,685	86,032	109,339	138,578	223,080

Sources: RECAP Model.

Table: **18**

SALES CAPACITY OF EXISTING

MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2008

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Co-op (East & Central) - 53-54 Long Chaulden, HP1 2HX	140	85	119	5,910	703
J Sainsbury - London Road, Apsley Mill, HP3 9QZ	4,637	74	3,431	9,423	32,334
J Sainsbury - Shenley Road, Woodhall Farm Estate, HP2 7QH	1,758	85	1,494	9,423	14,081
Tesco - Jarman Way, St Albans Road, HP2 4JS	4,361	64	2,791	13,033	36,376
Tesco Express - 33-35 Stoneycroft, HP1 2QF	187	95	178	13,033	2,315
Tesco Express - 6 Henry Wells Square, Grove Hill, HP2 6BJ	232	95	220	13,033	2,872
Welcome (Co-Op) - 46-48 Queens Street, Adeyfield, HP2 4EW	288	85	245	5,910	1,447
Welcome (Co-Op) - 22 Stoneycroft, Warners End, HP1 2QE	187	85	159	5,910	939
Costcutter (Rossgate)	192	95	182	4,000	730
Co-Op - Long Caulden	175	85	149	5,910	879
ALL STORES	12,157		8,969	10,333	92,676

Sources: IGD, DTZ, Verdict Research, VOA 2005 Prices

Table: **19**

SALES CAPACITY OF EXISTING RETAIL WAREHOUSES & MAIN FOODSTORES*

Net to gross ratio: 85 % (unless otherwise indicated)	Date of sales densities:			2006
Store	Gross Flrspce (sq m)	Net Flrspce (sq m)	Sales Density 2006 (£per sqm net)	Sales 2006 (£000)
Comet - Unit 2 Apsley Mills Retail Park, HP3 9QN	2,075	1,764	7,842	13,831
Pets at Home - 251, London Road, HP3 9SE	n/a	1,013	2,669	2,703
Wickes - London Road, HP3 9SR (1)	n/a	1,644	2,424	3,985
Argos Extra - Unit 4, Apsley Mills Retail Park, HP3 9QN (2)	929	n/a	n/a	12,890
Staples – Unit, A 251, London Road, HP3 9SE (3)	n/a	619	1,968	1,218
Carpetright - Apsley Mills Retail Park, HP3 9QN	n/a	923	1,369	1,263
Halfords - Unit B 251, London Road, HP3 9SE (4)	n/a	682	2,521	1,719
Homebase - Apsley Mills Retail Park, HP3 9QN	n/a	5,640	1,460	8,235
Currys superstore Apsley Mills Retail Park, HP3 9QN	1,308	1,112	7,390	8,216
Dunelm Mill - London Road, HP3 9SR	n/a	3,110	2,558	7,956
MFI - Cupids Green, Redbourn Road, HP2 7BA	n/a	1,463	3,456	5,056
B&Q - Retail Limited, Two Waters Road, HP3 9BX (5)	n/a	2,098	2,028	4,255
Allied Carpets - London Road, HP3 9SE	n/a	1,013	1,292	1,308
J Sainsbury - London Road, Apsley Mill, HP3 9QZ	n/a	1,206	7,253	8,744
Tesco - Jarman Way, St Albans Road, HP2 4JS	n/a	1,570	9,014	14,152
J Sainsbury - Shenley Road, Woodhall Farm Estate, HP2 7QH	n/a	264	7,253	1,913
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TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns	4,312	24,119	**4,040**	97,445

Sources: VOA Rating List. 'Retail Rankings', Mintel, with VAT added for compatibility with expenditure.
DTZ. Verdict Research.

Notes:
* Comparison goods floorspace in main foodstores
(1) Wickes net sales are is 2135 sq m net, but 23% excluded to allow for trade (ie non-retail) sales.
(2) Measurement of Argos' net sales area is open to interpretation so in this case we have applied an average sales per outlet of £12.89m in 2005 prices.
(3) Staples net sales area is 1,032 sq m net, but 40% excluded as non-retail.
(4) Halfords net sales area is 1,136 sq m net, but 40% excluded as non-retail (car parts and accessories).
(5) B& Q is 2,725 sq m net, but 23% excluded to allow for trade (ie non-retail) sales.

Table: **20**

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
None currently committed			-		-
ALL STORES	-		-	#DIV/0!	-

COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Retail Warehouses at Jarman Park	6,700	85	5,695	3,000	17,085
ALL STORES AND SCHEMES	6,700		**5,695**	3,000	**17,085**

Sources: DTZ, based on Verdict Research and Retail Rankings.

Table: **21**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Non-central shopping in Hemel Hempstead**

Baseline - Market Shares indicated by the Household Interview Survey 2008 remain unchanged.

Growth in sales per sq m from shop floorspace existing in 2008 Comparison Goods: 1.50 % pa to 2031

	CONVENIENCE GOODS					COMPARISON GOODS				
	2008	2011	2016	2021	2031	2008	2011	2016	2021	2031
Residents' Spending £000	108,987	113,662	125,988	139,187	169,931	81,685	86,032	109,339	138,578	223,080
Plus visitors' spending (%)										
Total spending (£000)	108,987	113,662	125,988	139,187	169,931	81,685	86,032	109,339	138,578	223,080
Existing shop floorspace (sq m net)	8,969	8,969	8,969	8,969	8,969	24,119	24,119	24,119	24,119	24,119
Sales per sq m net (£)	12,152	10,333	10,333	10,333	10,333	3,387	4,352	4,689	5,051	5,862
Sales from extg flrspce (£000)	108,987	92,676	92,676	92,676	92,676	81,685	104,975	113,088	121,828	141,387
Available spending to support new shops (£000)	0	20,986	33,311	46,510	77,255	0	(18,943)	(3,750)	16,750	81,693
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	17,085	18,405	19,828	23,011
Net available spending for new shops (£000)	0	20,986	33,311	46,510	77,255	0	(36,028)	(22,155)	(3,078)	58,682
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	3,500	3,660	3,943	4,247	4,929
Capacity for new shop flrspc (sq m net)	**0**	**1,749**	**2,776**	**3,876**	**6,438**	**0**	**(9,844)**	**(5,619)**	**(725)**	**11,905**

Market Share of Catchment Area Expenditure	31.2%	31.5%	32.4%	33.2%	34.6%	11.4%	11.5%	11.8%	12.0%	12.5%

Sources: RECAP Model. DTZ estimates.

Notes:

Scenario 1

Berkhamsted

Table: **22**

CONVENIENCE GOODS MARKET SHARES IN 2008

2008	Allocations to		
Berkhamsted			
Indicated by Household Interview Survey			
Zones	Main Food	Top-up convenience	**WEIGHTED AVERAGE**
	Q1	Q4	
	Expenditure weighting		
	75	25	100
	(%)	(%)	(%)
1	1.7	0.7	1.5
2	3.3	1.3	2.8
3	4.0	1.3	3.3
4	2.0	1.0	1.8
5	66.0	54.7	63.2
6	1.3	0.7	1.2
7	12.7	0.8	9.7
8	2.4	-	1.8

Sources: Household Interview Survey.
Expenditure weighting by DTZ.

Table: **23**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2008

	2008 Allocations to **Berkhamsted** Indicated by Household Interview Survey								
	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	**WEIGHTED AVERAGE**
	Q5	Q6	Q7	Q8	Q9	Q10	Q11	Q12	
Zones	Expenditure weighting								
	880.51	360.92	127.38	113.97	497.24	302.82	473.78	968.79	3,725.41
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	-	0.5	0.4	-	-	0.4	1.1	0.5	0.4
2	1.4	-	-	-	-	0.8	1.4	1.9	1.1
3	1.5	1.1	-	-	-	0.7	4.9	4.3	2.3
4	-	-	-	-	-	-	-	-	0.0
5	12.3	14.6	11.9	3.3	1.7	30.5	88.4	52.2	32.4
6	0.8	-	-	-	-	-	0.7	0.8	0.5
7	0.9	-	1.0	-	-	3.5	6.7	10.6	4.1
8	1.8	1.1	1.9	-	-	0.9	1.6	-	0.9

Sources: Household Interview Survey.
RECAP Table 2 for expenditure weights.

Table: **24**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Berkhamsted**

Baseline - Market Shares indicated by the Household Interview Survey 2008 remain unchanged.

Market shares correction factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2031 (%)	2008 (%)	2011 (%)	2016 (%)	2021	2031 (%)
1	1	1	1	1	1	0	0	0	0	0
2	3	3	3	3	3	1	1	1	1	1
3	3	3	3	3	3	2	2	2	2	2
4	2	2	2	2	2	0	0	0	0	0
5	63	63	63	63	63	32	32	32	32	32
6	1	1	1	1	1	0	0	0	0	0
7	10	10	10	10	10	4	4	4	4	4
8	2	2	2	2	2	1	1	1	1	1

Sources: RECAP Model.
DTZ for market share corrections.

Table: **25**

COMPARISON GOODS SALES BY GOODS TYPE IN 2008

Catchment Zones	2008 Sales in **Berkhamsted** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	103	27	0	0	68	306	271
2	322	0	0	0	0	65	185	488
3	299	93	0	0	0	49	560	957
4	0	0	0	0	0	0	0	0
5	2,247	1,137	308	79	168	1,964	9,265	10,651
6	160	0	0	0	0	0	80	178
7	129	0	20	0	0	176	550	1,693
8	283	74	42	0	0	50	144	0
TOTALS	3,438	1,408	398	79	168	2,373	11,090	14,238
MARKET SHARES	2%	2%	2%	0%	0%	4%	12%	8%

Sources: RECAP Model.

Table: **26**

FORECAST RETAIL SALES

Scenario: 1 Location: **Berkhamsted**

Baseline - Market Shares indicated by the Household Interview Survey 2008 remain unchanged.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE CONVENIENCE GOODS 2008 (£000)	2011 (£000)	2016 (£000)	2021 £0	2031 (£000)	COMPARISON GOODS 2008 (£000)	2011 (£000)	2016 (£000)	2021 £0	2031 (£000)
1	1,014	1,068	1,227	1,398	1,793	0	0	0	0	0
2	1,441	1,480	1,546	1,619	1,793	984	1,023	1,230	1,482	2,176
3	1,249	1,288	1,361	1,437	1,618	1,706	1,780	2,164	2,631	3,929
4	314	321	337	356	399	0	0	0	0	0
5	24,053	24,621	26,111	27,678	31,395	25,027	25,923	31,645	38,611	58,076
6	417	424	437	455	495	0	0	0	0	0
7	2,989	3,043	3,195	3,355	3,737	2,449	2,523	3,050	3,686	5,444
8	656	669	700	735	818	672	693	835	1,009	1,489
TOTALS	32,133	32,914	34,914	37,032	42,047	30,839	31,942	38,924	47,419	71,114

Sources: RECAP Model.

Table: **27**

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2008

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Welcome (Co-Op) - 211 High Street, Berkhamsted. HP4 1AD	130	95	124	5,910	730
Tesco Metro - 160 High Street, Berkhamsted. HP4 3AP	1,270	50	635	13,033	8,276
Waitrose - St Johns Well Lane, Berkhamsted. HP4 1HS	2,975	86	2,559	11,827	30,259
Other food convenience goods stores in Berkhamsted Town Centre	569	95	541	4,500	2,432
ALL STORES	4,944		3,858	10,809	41,698

Sources: IGD, DTZ, Verdict Research, VOA

Table: **28**

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
None committed.					
ALL STORES	-		-	#DIV/0!	-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
None committed.					
ALL STORES AND SCHEMES	-		-	#DIV/0!	-

Sources: DTZ, based on Verdict Research and Retail Rankings.

Table: **29**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Berkhamsted**

Baseline - Market Shares indicated by the Household Interview Survey 2008 remain unchanged.

Growth in sales per sq m from shop floorspace existing in 2008 Comparison Goods: 1.50 % pa 2011 to 2031

	CONVENIENCE GOODS					COMPARISON GOODS				
	2008	2011	2016	2021	2031	2008	2011	2016	2021	2031
Residents' Spending £000	32,133	32,914	34,914	37,032	42,047	30,839	31,942	38,924	47,419	71,114
Plus visitors' spending (%)		-	-	-	-		-	-	-	-
Total spending (£000)	32,133	32,914	34,914	37,032	42,047	30,839	31,942	38,924	47,419	71,114
Existing shop floorspace (sq m net)	3,858	3,858	3,858	3,858	3,858	7,870	7,870	7,870	7,870	7,870
Sales per sq m net (£)	8,330	10,809	10,809	10,809	10,809	3,918	3,918	4,221	4,547	5,277
Sales from extg flrspce (£000)	32,133	41,698	41,698	41,698	41,698	30,839	30,839	33,222	35,790	41,535
Available spending to support new shops (£000)	0	(8,784)	(6,784)	(4,666)	349	0	1,103	5,702	11,630	29,579
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	(8,784)	(6,784)	(4,666)	349	0	1,103	5,702	11,630	29,579
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	4,500	4,706	5,069	5,461	6,338
Capacity for new shop flrspc (sq m net)	**0**	**(732)**	**(565)**	**(389)**	**29**	**0**	**234**	**1,125**	**2,130**	**4,667**

Market Share of Catchment Area Expenditure	9.2%	9.1%	9.0%	8.8%	8.6%	4.3%	4.3%	4.2%	4.1%	4.0%

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 1

Tring (including Tesco)

Table: **30**

CONVENIENCE GOODS MARKET SHARES IN 2008

2008	Allocations to		
Tring (including Tesco)			
Indicated by Household Interview Survey			
Zones	Main Food	Top-up convenience	**WEIGHTED AVERAGE**
	Q1	Q4	
	Expenditure weighting		
	75	25	100
	(%)	(%)	(%)
1	0.3	0.3	0.3
2	-	1.3	0.3
3	-	-	0.0
4	-	-	0.0
5	15.3	4.0	12.5
6	0.7	-	0.5
7	61.9	65.1	62.7
8	4.0	8.0	5.0

Sources: Household Interview Survey.
Expenditure weighting by DTZ.

Table: **31**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2008

	2008 Allocations to **Tring (including Tesco)** Indicated by Household Interview Survey								
	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	**WEIGHTED AVERAGE**
	Q5	Q6	Q7	Q8	Q9	Q10	Q11	Q12	
Zones	Expenditure weighting								
	880.51	360.92	127.38	113.97	497.24	302.82	473.78	968.79	3,725.41
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	-	-	0.4	-	-	-	0.4	0.5	0.2
2	-	-	-	-	-	-	-	-	0.0
3	-	-	-	-	-	-	-	-	0.0
4	-	-	-	-	-	-	-	-	0.0
5	-	-	-	-	0.9	1.5	0.7	-	0.3
6	-	-	0.8	-	-	0.8	-	-	0.1
7	5.4	5.4	4.0	17.5	25.0	23.9	62.5	22.4	21.5
8	-	-	-	1.0	4.0	0.9	0.8	-	0.7

Sources: Household Interview Survey.
RECAP Table 2 for expenditure weights.

Table: **32**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Tring (including Tesco)**

Baseline - Market Shares indicated by the Household Interview Survey 2008 remain unchanged.

Market shares correction factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2031 (%)	2008 (%)	2011 (%)	2016 (%)	2021	2031 (%)
1	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	12	12	12	12	12	0	0	0	0	0
6	1	1	1	1	1	0	0	0	0	0
7	63	63	63	63	63	22	22	22	22	22
8	5	5	5	5	5	1	1	1	1	1

Sources: RECAP Model.
DTZ for market share corrections.

Table: **33**

COMPARISON GOODS SALES BY GOODS TYPE IN 2008

Catchment Zones	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
	2008 Sales in **Tring (including Tesco)** By Comparison Goods Type.							
1	0	0	27	0	0	0	111	271
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0
5	0	0	0	0	89	97	73	0
6	0	0	23	0	0	56	0	0
7	772	329	81	327	1,929	1,205	5,128	3,578
8	0	0	0	21	339	50	72	0
TOTALS	772	329	131	348	2,356	1,407	5,385	3,849
MARKET SHARES	0%	0%	1%	2%	3%	2%	6%	2%

Sources: RECAP Model.

Table: **34**

FORECAST RETAIL SALES

Scenario: 1 Location: **Tring (including Tesco)**

Baseline - Market Shares indicated by the Household Interview Survey 2008 remain unchanged.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE CONVENIENCE GOODS 2008 (£000)	2011 (£000)	2016 (£000)	2021 £0	2031 (£000)	COMPARISON GOODS 2008 (£000)	2011 (£000)	2016 (£000)	2021 £0	2031 (£000)
1	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	4,581	4,690	4,973	5,272	5,980	0	0	0	0	0
6	417	424	437	455	495	0	0	0	0	0
7	18,829	19,169	20,131	21,136	23,541	13,469	13,876	16,774	20,271	29,940
8	1,641	1,672	1,750	1,837	2,044	672	693	835	1,009	1,489
TOTALS	25,468	25,955	27,291	28,700	32,061	14,142	14,569	17,608	21,281	31,429

Sources: RECAP Model.

Table: 35

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2008

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
M&S - Frazier House, Dolphin Square, TRING. HP23 5BN	660	67	442	12,013	5,312
Tesco - London Road, TRING. HP23 6HA	1,624	85	1,380	13,033	17,991
Other food convenience goods stores in Tring	598	95	568	4,000	2,272
ALL STORES	2,882		2,391	10,698	25,575

Sources: IGD and Goad. Dacorum BC for M&S.

Table: 36

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
None committed			-		-
ALL STORES	-		-	#DIV/0!	-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
None committed			-		-
ALL STORES AND SCHEMES	-		-	#DIV/0!	-

Sources: DTZ, based on Verdict Research and Retail Rankings.

Table: **37**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Tring (including Tesco)**

Baseline - Market Shares indicated by the Household Interview Survey 2008 remain unchanged.

Growth in sales per sq m from shop floorspace existing in 2008 Comparison Goods: 1.50 % pa 2011 to 2031

	CONVENIENCE GOODS					COMPARISON GOODS				
	2008	2011	2016	2021	2031	2008	2011	2016	2021	2031
Residents' Spending £000	25,468	25,955	27,291	28,700	32,061	14,142	14,569	17,608	21,281	31,429
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	25,468	25,955	27,291	28,700	32,061	14,142	14,569	17,608	21,281	31,429
Existing shop floorspace (sq m net)	2,391	2,391	2,391	2,391	2,391	3,147	3,147	3,147	3,147	3,147
Sales per sq m net (£)	10,653	10,698	10,698	10,698	10,698	4,493	4,493	4,841	5,215	6,052
Sales from extg flrspce (£000)	25,468	25,575	25,575	25,575	25,575	14,142	14,142	15,235	16,412	19,047
Available spending to support new shops (£000)	0	380	1,716	3,125	6,485	0	428	2,374	4,869	12,382
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	380	1,716	3,125	6,485	0	428	2,374	4,869	12,382
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	4,500	4,706	5,069	5,461	6,338
Capacity for new shop flrspc (sq m net)	**0**	**32**	**143**	**260**	**540**	**0**	**91**	**468**	**892**	**1,954**

Market Share of Catchment Area Expenditure	7.3%	7.2%	7.0%	6.8%	6.5%	2.0%	1.9%	1.9%	1.8%	1.8%

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 2

Hemel Hempstead Town Centre

Table: 38

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 2 Location: **Hemel Hempstead Town Centre**

Increase in market shares of convenience and comparison goods expenditure attracted to Hemel Hempstead Town Centre from 2016 due to Waterside Square; and reductions in market shares of convenience goods expenditure attracted to Non-central main foodstores. Increase in comparison goods expenditure attracted to non-central retail warehouses due to committed Jarman Park development.

Market shares adjustment factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2031 (%)	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	18	18	41	41	41	48	48	50	50	50
2	5	5	19	19	19	17	17	18	18	18
3	27	27	48	48	48	56	56	58	58	58
4	2	2	8	8	8	11	11	11	11	11
5	3	3	5	5	5	20	20	21	21	21
6	1	1	1	1	1	19	19	20	20	20
7	2	2	2	2	2	14	14	14	14	14
8	0	0	0	0	0	2	2	2	2	2

Sources: RECAP Model.
DTZ for market share adjustments.

Table: 39

FORECAST RETAIL SALES

Scenario: 2 Location: **Hemel Hempstead Town Centre**

Increase in market shares of convenience and comparison goods expenditure attracted to Hemel Hempstead Town Centre from 2016 due to Waterside Square; and reductions in market shares of convenience goods expenditure attracted to Non-central main foodstores. Increase in comparison goods expenditure attracted to non-central retail warehouses due to committed Jarman Park development.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2031 (£000)	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2031 (£000)
1	18,249	19,224	50,326	57,310	73,505	99,690	106,267	146,439	191,950	326,465
2	2,402	2,467	9,790	10,255	11,353	16,728	17,389	22,131	26,682	39,170
3	11,242	11,591	21,769	22,989	25,892	47,766	49,834	62,763	76,294	113,944
4	314	321	1,348	1,422	1,597	3,533	3,661	4,421	5,372	7,995
5	1,145	1,172	2,072	2,197	2,492	15,642	16,202	20,767	25,339	38,113
6	417	424	437	455	495	16,236	16,702	20,862	24,970	36,046
7	598	609	639	671	747	8,571	8,830	10,674	12,900	19,052
8	0	0	0	0	0	1,345	1,386	1,670	2,019	2,978
TOTALS	34,367	35,809	86,381	95,298	116,081	209,511	220,270	289,727	365,524	583,763

Sources: RECAP Model.

Table: **40**

FORECAST RETAIL CAPACITY

Scenario: 2 Location: **Hemel Hempstead Town Centre**

Increase in market shares of convenience and comparison goods expenditure attracted to Hemel Hempstead Town Centre from 2016 due to Waterside Square; and reductions in market shares of convenience goods expenditure attracted to Non-central main foodstores. Increase in comparison goods expenditure attracted to non-central retail warehouses due to committed Jarman Park development.

Growth in sales per sq m from shop floorspace existing in 2008 Comparison Goods: 1.50 % pa 2011 to 2031

	CONVENIENCE GOODS					COMPARISON GOODS				
	2008	2011	2016	2021	2031	2008	2011	2016	2021	2031
Residents' Spending £000	34,367	35,809	86,381	95,298	116,081	209,511	220,270	289,727	365,524	583,763
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	34,367	35,809	86,381	95,298	116,081	209,511	220,270	289,727	365,524	583,763
Existing shop floorspace (sq m net)	4,267	4,267	4,267	4,267	4,267	40,184	40,184	40,184	40,184	40,184
Sales per sq m net (£)	8,055	9,799	9,799	9,799	9,799	5,214	5,214	5,617	6,051	7,022
Sales from extg flrspce (£000)	34,367	41,811	41,811	41,811	41,811	209,511	209,511	225,703	243,146	282,181
Available spending to support new shops (£000)	0	(6,002)	44,571	53,488	74,270	0	10,759	64,024	122,378	301,582
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	(6,002)	44,571	53,488	74,270	0	10,759	64,024	122,378	301,582
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	5,000	5,228	5,632	6,068	7,042
Capacity for new shop flrspc (sq m net)	**0**	**(500)**	**3,714**	**4,457**	**6,189**	**0**	**2,058**	**11,367**	**20,169**	**42,827**

Market Share of Catchment Area Expenditure	9.8%	9.9%	22.2%	22.7%	23.7%	29.3%	29.5%	31.2%	31.8%	32.7%

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 2

Non-central shopping in Hemel Hempstead

Table: **41**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 2 Location: **Non-central shopping in Hemel Hempstead**

Increase in market shares of convenience and comparison goods expenditure attracted to Hemel Hempstead Town Centre from 2016 due to Waterside Square; and reductions in market shares of convenience goods expenditure attracted to Non-central main foodstores. Increase in comparison goods expenditure attracted to non-central retail warehouses due to committed Jarman Park development.

Market shares adjustment factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2031 (%)	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	62	62	48	48	48	21	23	23	23	23
2	36	36	26	26	26	10	11	11	11	11
3	54	54	38	38	38	17	19	19	19	19
4	20	20	15	15	15	5	5	5	5	5
5	6	6	5	5	5	8	8	8	8	8
6	0	0	0	0	0	4	4	4	4	4
7	2	2	2	2	2	4	4	4	4	4
8	1	1	1	1	1	0	0	0	0	0

Sources: RECAP Model.
DTZ for market share adjustments.

Table: **42**

FORECAST RETAIL SALES

Scenario: 2 Location: **Non-central shopping in Hemel Hempstead**

Increase in market shares of convenience and comparison goods expenditure attracted to Hemel Hempstead Town Centre from 2016 due to Waterside Square; and reductions in market shares of convenience goods expenditure attracted to Non-central main foodstores. Increase in comparison goods expenditure attracted to non-central retail warehouses due to committed Jarman Park development.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2031 (£000)	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2031 (£000)
1	62,858	66,217	58,918	67,094	86,055	43,614	50,920	67,362	88,297	150,174
2	17,293	17,764	13,397	14,033	15,535	9,840	11,251	13,525	16,305	23,937
3	22,484	23,182	17,234	18,200	20,498	14,500	16,908	20,560	24,993	37,327
4	3,135	3,211	2,527	2,667	2,994	1,606	1,664	2,010	2,442	3,634
5	2,291	2,345	2,072	2,197	2,492	6,257	6,481	7,911	9,653	14,519
6	0	0	0	0	0	3,418	3,516	4,172	4,994	7,209
7	598	609	639	671	747	2,449	2,523	3,050	3,686	5,444
8	328	334	350	367	409	0	0	0	0	0
TOTALS	108,987	113,662	95,137	105,229	128,730	81,685	93,263	118,590	150,369	242,243

Sources: RECAP Model.

Table: **43**

FORECAST RETAIL CAPACITY

Scenario: 2 Location: **Non-central shopping in Hemel Hempstead**

Increase in market shares of convenience and comparison goods expenditure attracted to Hemel Hempstead Town Centre from 2016 due to Waterside Square; and reductions in market shares of convenience goods expenditure attracted to Non-central main foodstores. Increase in comparison goods expenditure attracted to non-central retail warehouses due to committed Jarman Park development.

Growth in sales per sq m from shop floorspace existing in 2008 Comparison Goods: 1.50 % pa to 2031

	CONVENIENCE GOODS					COMPARISON GOODS				
	2008	2011	2016	2021	2031	2008	2011	2016	2021	2031
Residents' Spending £000	108,987	113,662	95,137	105,229	128,730	81,685	93,263	118,590	150,369	242,243
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	108,987	113,662	95,137	105,229	128,730	81,685	93,263	118,590	150,369	242,243
Existing shop floorspace (sq m net)	8,969	8,969	8,969	8,969	8,969	24,119	24,119	24,119	24,119	24,119
Sales per sq m net (£)	12,152	10,333	10,333	10,333	10,333	3,387	4,352	4,689	5,051	5,862
Sales from extg flrspce (£000)	108,987	92,676	92,676	92,676	92,676	81,685	104,975	113,088	121,828	141,387
Available spending to support new shops (£000)	0	20,986	2,461	12,553	36,054	0	(11,713)	5,501	28,541	100,857
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	17,085	18,405	19,828	23,011
Net available spending for new shops (£000)	0	20,986	2,461	12,553	36,054	0	(28,798)	(12,904)	8,713	77,846
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	3,500	3,660	3,943	4,247	4,929
Capacity for new shop flrspc (sq m net)	**0**	**1,749**	**205**	**1,046**	**3,004**	**0**	**(7,869)**	**(3,273)**	**2,051**	**15,792**

Market Share of Catchment Area Expenditure	31.2%	31.5%	24.5%	25.1%	26.2%	11.4%	12.5%	12.8%	13.1%	13.6%

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 2

Berkhamsted

Table: **44**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 2 Location: **Berkhamsted**

Increase in market shares of convenience and comparison goods expenditure attracted to Hemel Hempstead Town Centre from 2016 due to Waterside Square; and reductions in market shares of convenience goods expenditure attracted to Non-central main foodstores. Increase in comparison goods expenditure attracted to non-central retail warehouses due to committed Jarman Park development.

Market shares adjustment factors:		
Convenience Goods:	100	% of survey indicated figures
Comparison Goods:	100	% of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2031 (%)	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	1	1	1	1	1	0	0	0	0	0
2	3	3	3	3	3	1	1	1	1	1
3	3	3	3	3	3	2	2	2	2	2
4	2	2	2	2	2	0	0	0	0	0
5	63	63	63	63	63	32	32	32	32	32
6	1	1	1	1	1	0	0	0	0	0
7	10	10	10	10	10	4	4	4	4	4
8	2	2	2	2	2	1	1	1	1	1

Sources: RECAP Model.
DTZ for market share adjustments.

Table: **45**

FORECAST RETAIL SALES

Scenario: 2 Location: **Berkhamsted**

Increase in market shares of convenience and comparison goods expenditure attracted to Hemel Hempstead Town Centre from 2016 due to Waterside Square; and reductions in market shares of convenience goods expenditure attracted to Non-central main foodstores. Increase in comparison goods expenditure attracted to non-central retail warehouses due to committed Jarman Park development.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2031 (£000)	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2031 (£000)
1	1,014	1,068	1,227	1,398	1,793	0	0	0	0	0
2	1,441	1,480	1,546	1,619	1,793	984	1,023	1,230	1,482	2,176
3	1,249	1,288	1,361	1,437	1,618	1,706	1,780	2,164	2,631	3,929
4	314	321	337	356	399	0	0	0	0	0
5	24,053	24,621	26,111	27,678	31,395	25,027	25,923	31,645	38,611	58,076
6	417	424	437	455	495	0	0	0	0	0
7	2,989	3,043	3,195	3,355	3,737	2,449	2,523	3,050	3,686	5,444
8	656	669	700	735	818	672	693	835	1,009	1,489
TOTALS	32,133	32,914	34,914	37,032	42,047	30,839	31,942	38,924	47,419	71,114

Sources: RECAP Model.

Table: **46**

FORECAST RETAIL CAPACITY

Scenario: 2 Location: **Berkhamsted**

Increase in market shares of convenience and comparison goods expenditure attracted to Hemel Hempstead Town Centre from 2016 due to Waterside Square; and reductions in market shares of convenience goods expenditure attracted to Non-central main foodstores. Increase in comparison goods expenditure attracted to non-central retail warehouses due to committed Jarman Park development.

Growth in sales per sq m from shop floorspace existing in 2008 Comparison Goods: 1.50 % pa 2011 to 2031

	CONVENIENCE GOODS					COMPARISON GOODS				
	2008	2011	2016	2021	2031	2008	2011	2016	2021	2031
Residents' Spending £000	32,133	32,914	34,914	37,032	42,047	30,839	31,942	38,924	47,419	71,114
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	32,133	32,914	34,914	37,032	42,047	30,839	31,942	38,924	47,419	71,114
Existing shop floorspace (sq m net)	3,858	3,858	3,858	3,858	3,858	7,870	7,870	7,870	7,870	7,870
Sales per sq m net (£)	8,330	10,809	10,809	10,809	10,809	3,918	3,918	4,221	4,547	5,277
Sales from extg flrspce (£000)	32,133	41,698	41,698	41,698	41,698	30,839	30,839	33,222	35,790	41,535
Available spending to support new shops (£000)	0	(8,784)	(6,784)	(4,666)	349	0	1,103	5,702	11,630	29,579
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	(8,784)	(6,784)	(4,666)	349	0	1,103	5,702	11,630	29,579
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	4,500	4,706	5,069	5,461	6,338
Capacity for new shop flrspc (sq m net)	**0**	**(732)**	**(565)**	**(389)**	**29**	**0**	**234**	**1,125**	**2,130**	**4,667**
Market Share of Catchment Area Expenditure	9.2%	9.1%	9.0%	8.8%	8.6%	4.3%	4.3%	4.2%	4.1%	4.0%

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 2

Tring (including Tesco)

Table: **47**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 2 Location: **Tring (including Tesco)**

Increase in market shares of convenience and comparison goods expenditure attracted to Hemel Hempstead Town Centre from 2016 due to Waterside Square; and reductions in market shares of convenience goods expenditure attracted to Non-central main foodstores. Increase in comparison goods expenditure attracted to non-central retail warehouses due to committed Jarman Park development.

Market shares adjustment factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2031 (%)	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	12	12	12	12	12	0	0	0	0	0
6	1	1	1	1	1	0	0	0	0	0
7	63	63	63	63	63	22	22	22	22	22
8	5	5	5	5	5	1	1	1	1	1

Sources: RECAP Model.
DTZ for market share adjustments.

Table: **48**

FORECAST RETAIL SALES

Scenario: 2 Location: **Tring (including Tesco)**

Increase in market shares of convenience and comparison goods expenditure attracted to Hemel Hempstead Town Centre from 2016 due to Waterside Square; and reductions in market shares of convenience goods expenditure attracted to Non-central main foodstores. Increase in comparison goods expenditure attracted to non-central retail warehouses due to committed Jarman Park development.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2031 (£000)	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2031 (£000)
1	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	4,581	4,690	4,973	5,272	5,980	0	0	0	0	0
6	417	424	437	455	495	0	0	0	0	0
7	18,829	19,169	20,131	21,136	23,541	13,469	13,876	16,774	20,271	29,940
8	1,641	1,672	1,750	1,837	2,044	672	693	835	1,009	1,489
TOTALS	25,468	25,955	27,291	28,700	32,061	14,142	14,569	17,608	21,281	31,429

Sources: RECAP Model.

Table: 49

FORECAST RETAIL CAPACITY

Scenario: 2 Location: **Tring (including Tesco)**

Increase in market shares of convenience and comparison goods expenditure attracted to Hemel Hempstead Town Centre from 2016 due to Waterside Square; and reductions in market shares of convenience goods expenditure attracted to Non-central main foodstores. Increase in comparison goods expenditure attracted to non-central retail warehouses due to committed Jarman Park development.

Growth in sales per sq m from shop floorspace existing in 2008 Comparison Goods: 1.50 % pa 2011 to 2031

	CONVENIENCE GOODS					COMPARISON GOODS				
	2008	2011	2016	2021	2031	2008	2011	2016	2021	2031
Residents' Spending £000	25,468	25,955	27,291	28,700	32,061	14,142	14,569	17,608	21,281	31,429
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	25,468	25,955	27,291	28,700	32,061	14,142	14,569	17,608	21,281	31,429
Existing shop floorspace (sq m net)	2,391	2,391	2,391	2,391	2,391	3,147	3,147	3,147	3,147	3,147
Sales per sq m net (£)	10,653	10,698	10,698	10,698	10,698	4,493	4,493	4,841	5,215	6,052
Sales from extg flrspce (£000)	25,468	25,575	25,575	25,575	25,575	14,142	14,142	15,235	16,412	19,047
Available spending to support new shops (£000)	0	380	1,716	3,125	6,485	0	428	2,374	4,869	12,382
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	380	1,716	3,125	6,485	0	428	2,374	4,869	12,382
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	4,500	4,706	5,069	5,461	6,338
Capacity for new shop flrspc (sq m net)	**0**	**32**	**143**	**260**	**540**	**0**	**91**	**468**	**892**	**1,954**

Market Share of Catchment Area Expenditure	7.3%	7.2%	7.0%	6.8%	6.5%	2.0%	1.9%	1.9%	1.8%	1.8%

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Total Market Shares

Table: **50**

TOTAL MARKET SHARES BY COMPARISON GOODS TYPE IN 2008

SHOPPING LOCATION	COMPARISON GOODS TYPE							
	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY & garden goods	Chemists, medical & beauty goods	All other comparison goods
Hemel Hempstead Town Centre	39%	14%	23%	17%	17%	25%	33%	34%
Non-central shopping in Hemel Hempstead	2%	12%	17%	31%	28%	32%	7%	4%
Hemel Hempstead Total	**41%**	**26%**	**41%**	**48%**	**45%**	**57%**	**40%**	**38%**
Berkhamsted	2%	2%	2%	0%	0%	4%	12%	8%
Tring (including Tesco)	0%	0%	1%	2%	3%	2%	6%	2%
TOTALS DACORUM	**43%**	**28%**	**43%**	**50%**	**48%**	**63%**	**57%**	**48%**

Sources: RECAP Model

Table: **51**
Scenario: **1**

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: Hemel Hempstead

Catchment Zones	Town Centre and Non-Central Foodstores and Retail Warehouses									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2031 (%)	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2031 (%)
1	80	80	80	80	80	69	69	69	69	69
2	41	41	41	41	41	27	27	27	27	27
3	81	81	81	81	81	73	73	73	73	73
4	22	22	22	22	22	16	16	16	16	16
5	9	9	9	9	9	28	28	28	28	28
6	1	1	1	1	1	23	23	23	23	23
7	4	4	4	4	4	18	18	18	18	18
8	1	1	1	1	1	2	2	2	2	2

Sources: RECAP Model

Table: **52**
Scenario: **2**

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: Hemel Hempstead

Catchment Zones	Town Centre and Non-Central Foodstores and Retail Warehouses									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2031 (%)	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2031 (%)
1	80	80	89	89	89	69	71	73	73	73
2	41	41	45	45	45	27	28	29	29	29
3	81	81	86	86	86	73	75	77	77	77
4	22	22	23	23	23	16	16	16	16	16
5	9	9	10	10	10	28	28	29	29	29
6	1	1	1	1	1	23	23	24	24	24
7	4	4	4	4	4	18	18	18	18	18
8	1	1	1	1	1	2	2	2	2	2

Sources: RECAP Model

Table: **53**
Scenario: **2**

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: The Three Towns in Dacorum

Catchment Zones	Town Centre									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2031 (%)	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2031 (%)
1	81	81	90	90	90	69	71	73	73	73
2	44	44	48	48	48	28	29	30	30	30
3	84	84	89	89	89	75	77	79	79	79
4	24	24	25	25	25	16	16	16	16	16
5	84	84	85	85	85	60	60	61	61	61
6	3	3	3	3	3	23	23	24	24	24
7	77	77	77	77	77	44	44	44	44	44
8	8	8	8	8	8	4	4	4	4	4

Sources: RECAP Model

Table **54**

SUMMARY OF MARKET SHARES BY SHOPPING DESTINATION

Convenience Goods 2008

Catchment Zone	Hemel Hempstead Town Centre (%)	Hemel Hempstead Non-central (%)	Berkhamsted (%)	Tring (including Tesco) (%)	Local Shops in Dacorum (%)	Out of Borough (%)
1	18	62	1	0	7	12
2	5	36	3	0	8	48
3	27	54	3	0	9	7
4	2	20	2	0	6	70
5	3	6	63	12	5	11
6	1	0	1	1	0	97
7	2	2	10	63	5	18
8	0	1	2	5	4	88

Source: Dacorum Household Interview Survey 2008

Notes:

Table **55**

SUMMARY OF MARKET SHARES BY SHOPPING DESTINATION

Comparison Goods 2008

Catchment Zone	Hemel Hempstead Town Centre (%)	Hemel Hempstead Non-central (%)	Berkhamsted (%)	Tring (including Tesco) (%)	Local Shops in Dacorum & Out of Borough * (%)
1	48	21	0	0	31
2	17	10	1	0	72
3	56	17	2	0	25
4	11	5	0	0	84
5	20	8	32	0	40
6	19	4	0	0	77
7	14	4	4	22	56
8	2	0	1	1	96

Source: Dacorum Household Interview Survey 2008

Notes: * The results of the Household Interview Survey show insignificant comparison goods shopping in local shops, so the great majority of this is out of Borough shopping.

Table **56**

SUMMARY OF MARKET SHARES BY SHOPPING DESTINATION

Convenience Goods 2016 **Scenario 2**

Catchment Zone	Hemel Hempstead Town Centre (%)	Hemel Hempstead Non-central (%)	Berkhamsted (%)	Tring (including Tesco) (%)	Local Shops in Dacorum (%)	Out of Borough (%)
1	41	48	1	0	7	3
2	19	26	3	0	8	44
3	48	38	3	0	9	2
4	8	15	2	0	6	69
5	5	5	63	12	5	10
6	1	0	1	1	0	97
7	2	2	10	63	5	18
8	0	1	2	5	4	88

Source: Dacorum Household Interview Survey 2008
Notes:

Table **57**

SUMMARY OF MARKET SHARES BY SHOPPING DESTINATION

Comparison Goods 2016 **Scenario 2**

Catchment Zone	Hemel Hempstead Town Centre (%)	Hemel Hempstead Non-central (%)	Berkhamsted (%)	Tring (including Tesco) (%)	Local Shops in Dacorum & Out of Borough * (%)
1	50	23	0	0	27
2	18	11	1	0	70
3	58	19	2	0	21
4	11	5	0	0	84
5	21	8	32	0	39
6	20	4	0	0	76
7	14	4	4	22	56
8	2	0	1	1	96

Source: Dacorum Household Interview Survey 2008
Notes: * The results of the Household Interview Survey show insignificant comparison goods shopping in local shops, so the great majority of this is out of Borough shopping.