

Appendix F | Centre Boundaries

Appendix F – Centre Boundaries

The NPPF (2012) provides definitions of 'Primary Shopping Area' and 'Primary' and 'Secondary' Frontages in the glossary at Annex 2. The following definitions should be read in conjunction with Section 9 (H) of this Retail Study. It is noted however that the updated NPPF published in July 2018 has removed the requirement to designate Primary Frontages and Secondary Frontages. Notwithstanding, references to Primary Frontages and Secondary Frontages have not been removed from the conclusions of the Study as this was a point of detailed discussion with the five local authorities. While the revised NPPF may not require the designation of Primary Frontages and Secondary Frontages, they may still represent a valid reference point for future policy making.

Primary Shopping Area – A defined area where retail development is concentrated (generally comprising the Primary and Secondary Frontages which are adjoining and closely related to the Primary Shopping Frontage).

Primary Frontages – Likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods.

Secondary Frontages – Secondary Frontages provide greater opportunities for a diversity of uses.

We have defined each of these three categories for the larger centres within South West Hertfordshire, where there are clear distinctions between each category.

For some smaller centres though, it is not as easy to distinguish between Primary and Secondary Frontages. It can also be less desirable to do so in the context of the evolving role of town centres and the reduced reliance on a core of exclusively Class A1 retail uses to draw visitors to town centres. This is reflected in the general trends, described in Section 2 of this report, which shows that the ratio of A uses is changing with an inclination towards leisure services such as bars, cafes and restaurants, as well as other entertainment establishments.

In a number of smaller centres, we have therefore recommended that no Primary or Secondary Frontages be defined so that there is a greater level of flexibility of units within the Primary Shopping Area, thus strengthening the vitality and viability of the town centre. For example, Primary and Secondary Frontage designations are often restrictive to a certain proportion of Class A1 use, which could limit potential non-A1 occupiers that would otherwise positively impact on the draw of the town centre.

In order to ensure the centre's ability to adapt to future changes, it is advised that the current retail policies are replaced with more flexible wording. For example, each assessed centre could benefit from a policy that aims to retain a certain threshold A1 uses in the Primary Shopping Area, yet allows, as an exception, other town centre uses (as defined by the NPPF) where these would not have a significant adverse impact on the role and function of the centre in question assessed against a set list of criteria. In our experience, this is a policy approach that is increasingly being adopted by Local Planning Authorities for their respective town centres.

Our recommendations, and justifications, are described in the table which follows and are shown on the plans which accompany this appendix.

The mapping base used by Nexus differs to those of each local authority. For the avoidance of doubt when comparing existing and proposed boundaries, please refer to the schedule below where all proposed changes are listed.

Centre	Changes proposed to Town Centre, Primary Shopping Area and Primary and Secondary Shopping Frontages	Justification
Dacorum Borough Council		
Hemel Hempstead	<p>A separate Town Centre Boundary is proposed for Hemel Hempstead and Hemel Hempstead Old Town.</p> <p>It is proposed that Hemel Hempstead will have its own Town Centre Boundary.</p> <p>We propose that both centres should have their own Primary Shopping Areas as identified in Appendix F.</p>	<p>It is considered that Hemel Hempstead and Hemel Hempstead Old Town have separate functions and the best policy approach is to classify them as two separate centres. Hemel Hempstead Old Town has a different role to Hemel Hempstead, offering speciality shopping such as antique and gift shops, whilst also providing a strong food and drink offer. As outlined in Figure 9.7 (Suggested Retail Hierarchy for Larger Centres in South- West Hertfordshire) of this Retail and Leisure Study, Hemel Old Town is proposed as a district centre.</p> <p>Hemel Hempstead's Town Centre Boundary will extend up to the Forum and the Police Station on the west side of Marlowes and up to and including Carey Baptist Church on the east side of the Marlowes. This area is predominantly occupied by town centre uses. Past this point, the string of shops to the east of the Marlowes function separately to the main town centre and act as an extension to Hemel Old Town.</p> <p>The Primary Shopping Area is the area where the main retail uses are concentrated.</p>

Centre	Changes proposed to Town Centre, Primary Shopping Area and Primary and Secondary Shopping Frontages	Justification
	<p>Proposals include removing the residential development south of Selden Hill and residential development west of Leighton Buzzard Road from the Town Centre Boundary.</p> <p>A Primary Shopping Area has been proposed which extends up to Coombe Street to the west of Marlowes and 89 Marlowes to the east. This includes the defined Primary and Secondary Frontages. Primary and Secondary Shopping Frontages are not proposed within Hemel Hempstead Old Town.</p> <p>The District Centre Boundary for Hemel Hempstead Old Town is proposed to extend to 1-22A Marlowes and 60 Queensway.</p>	<p>These units are separated by the main road and do not function as part of the town centre.</p> <p>The exclusion of Primary and Secondary Frontages allows for flexibility within the proposed Primary Shopping Area.</p> <p>The inclusion of these units allows for the consolidation of Hemel Hempstead Old Town's retail offer. The prime retail offer for Hemel Hempstead Old Town is located along the High Street.</p>
Berkhamsted	<p>No change to the Primary and Secondary Frontage is proposed as shown in the Dacorum Site Allocations DPD (2017).</p> <p>A Primary Shopping Area has been created focusing on the High Street including the Primary and Secondary Frontages.</p>	<p>The Primary Shopping Area is the area where the main retail uses are concentrated.</p>

Centre	Changes proposed to Town Centre, Primary Shopping Area and Primary and Secondary Shopping Frontages	Justification
Tring	<p>The Town Centre Boundary has not changed from the adopted Local Plan.</p> <p>A Primary Shopping Area has been created to include the main High Street, Frogmore Street and Dolphin Square.</p>	<p>The Primary Shopping Area is the area where the main retail uses are concentrated.</p>
Hertsmere Borough Council		
Borehamwood	<p>No change to the existing Town Centre Boundary, but the addition of a Primary Shopping Area.</p> <p>The Primary Shopping Area includes Shenley Road, Borehamwood Shopping Park and Reel Cinema/Gala Bingo, but does not include the Tesco Extra, the railway station or buildings on the eastern side of Theobald Street, which are all on the edge of the Town Centre Boundary.</p> <p>While Shenley Road and Borehamwood Retail Park function quite differently, both are important aspects of the Town Centre. The central part of Shenley Road and the Shopping Park are both proposed as Primary Shopping Frontage.</p> <p>Primary and Secondary Frontages have been proposed for units within the Primary Shopping Area</p>	<p>The Primary Shopping Area is the area where the main retail uses are concentrated.</p> <p>Tesco Extra has been excluded from the Primary Shopping Area as the majority of trips are carried out by car and may not lead to linked trips into the Town Centre due to the Tesco being disconnected from Shenley Road.</p> <p>Both Shenley Road and the Borehamwood Retail Park include a high proportion of A1 use class units that contribute significantly to the footfall of the town centre. Due to its central location and car park provision, shoppers who park at the Retail Park are more likely to carry out linked trips within the town centre, particularly compared with Tesco Extra.</p> <p>Primary and Secondary Frontages have been included within the Primary Shopping Area. Primary Frontages have been proposed for the core areas of footfall generation,</p>

Centre	Changes proposed to Town Centre, Primary Shopping Area and Primary and Secondary Shopping Frontages	Justification
	<p>with frontage to Shenley Road and within the Borehamwood Retail Park.</p>	<p>while Secondary Frontages have been proposed along Shenley Road towards the east and west edges of the Primary Shopping Area.</p> <p>Community facilities including the Borehamwood Library and All Saints Church on Shenley Road have been included within the Primary Shopping Frontage as they represent important footfall generators and are considered to be main town centre uses.</p>
<p>Potters Bar Darkes Lane</p>	<p>Minor amendments to the adopted Local District Centre Boundary, and addition of a Primary Shopping Area.</p> <p>We propose the removal of non-retail buildings to the west of Darkes Lane from the Town Centre Boundary, and the introduction of a Primary Shopping Area which incorporates the two main groupings of shops north and south of the railway line.</p> <p>Primary and Secondary Frontages are not proposed</p>	<p>The addition of a Primary Shopping Area, where the main retail uses are concentrated, allows for flexibility within the town centre.</p> <p>The removal of non-retail buildings is proposed to consolidate the town centre and provide a focus on main town centre uses. The majority of these building are residential and do not contribute to the town centre. The Manor Road Car Park has also been excluded for this reason.</p> <p>To allow flexibility within the proposed Primary Shopping Area.</p> <p>Hertsmere Borough Council will be considering the appropriateness of designating Primary and/ or Secondary Frontages for Potters Bar Darkes Lane in the new Local Plan as its preparation progresses.</p>

Centre	Changes proposed to Town Centre, Primary Shopping Area and Primary and Secondary Shopping Frontages	Justification
Potters Bar High Street	<p>No change to the existing District Centre Boundary, but the addition of a Primary Shopping Area is proposed.</p> <p>The proposed Primary Shopping Area will include all units with frontage to High Street, but excludes the Tesco Superstore.</p>	<p>Primary and Secondary Frontages are not proposed to allow flexibility within the proposed Primary Shopping Area where the main retail uses are concentrated.</p> <p>The units fronting Potters Bar High Street generate a high level of footfall and include the main retail uses within the Town Centre. The Tesco Superstore has been excluded from the Primary Frontage as the majority of trips are carried out by car and may not lead to linked trips into the town centre.</p> <p>Hertsmere Borough Council will be considering the appropriateness of designating Primary and/ or Secondary Frontages for Potters Bar High Street in the new Local Plan as its preparation progresses.</p>
Radlett	<p>No change to the existing District Centre Boundary, but the addition of a Primary Shopping Area is proposed.</p> <p>Introduction of a Primary Shopping Area that incorporates the retail units within the District Centre Boundary facing onto Watling Street. Primary and Secondary Frontages are not proposed.</p>	<p>The addition of a Primary Shopping Area, where the main retail uses are concentrated, allows for flexibility within the town centre.</p> <p>Hertsmere Borough Council will be considering the appropriateness of designating Primary and/ or Secondary Frontages for Radlett in the new Local Plan as its preparation progresses.</p>

Centre	Changes proposed to Town Centre, Primary Shopping Area and Primary and Secondary Shopping Frontages	Justification
Bushey	<p>No change to the existing District Centre Boundary, but the addition of a Primary Shopping Area.</p> <p>Primary and Secondary Frontages are not proposed</p>	<p>A Primary Shopping Area has been added, and incorporates all retail units with frontage to High Street.</p> <p>To allow flexibility within the proposed Primary Shopping Area.</p> <p>Hertsmere Borough Council will be considering the appropriateness of designating Primary and/ or Secondary Frontages for Bushey in the new Local Plan as its preparation progresses.</p>
Bushey Heath	<p>No change to the existing District Centre Boundary, but the addition of a Primary Shopping Area.</p> <p>Primary and Secondary Frontages are not proposed.</p>	<p>Bushey Heath District Centre is already fairly compact. The Primary Shopping Area has been introduced to cover all retail units with frontage to the High Street within the District Centre Boundary.</p> <p>To allow flexibility within the proposed Primary Shopping Area.</p> <p>Hertsmere Borough Council will be considering the appropriateness of designating Primary and/ or Secondary Frontages for Bushey Heath in the new Local Plan as its preparation progresses.</p>
Three Rivers District Council		
Rickmansworth	Proposals include the creation of a Town Centre Boundary and Primary Shopping Area.	

Centre	Changes proposed to Town Centre, Primary Shopping Area and Primary and Secondary Shopping Frontages	Justification
	<p>The proposed Primary Shopping Area incorporates all retail units with frontage onto High Street, and Church Street.</p> <p>Primary Frontages are proposed for all units within the Primary Shopping Area that have frontage to High Street and Church Street. Secondary Frontages are proposed for units within the Primary Shopping Area with frontage to Station Road.</p>	<p>The Primary Shopping Area has been created based on Primary and Secondary Frontages from the adopted Policies Map.</p> <p>The units fronting the High Street and Church Street generate a high level of footfall and include the main retail uses within the Town Centre. The units fronting Station Road include a more diverse retail offer, primarily made up of service units.</p>
South Oxhey	<p>The proposed Town Centre Boundary includes the existing retail square of South Oxhey, and units with frontage to Station Approach. The proposed Primary Shopping Area incorporates all units making up the South Oxhey retail square.</p> <p>Proposals include the creation of a Town Centre Boundary and Primary Shopping Area. Primary and Secondary Frontages not proposed.</p>	<p>The Primary Shopping Area includes Station Approach. Although this area is currently under construction, Three Rivers plan to designate the proposed 19 retail units as either Primary or Secondary Frontages in the new Local Plan. It should be noted that the composition of South Oxhey's Primary Shopping Area may change in the future as the redevelopment of South Oxhey nears to completion.</p> <p>Three Rivers District Council will be considering designating Primary and Secondary Frontages for South Oxhey as the new Local Plan progresses.</p>
Abbots Langley	<p>Proposals include the creation of a Town Centre Boundary and Primary Shopping Area.</p> <p>Primary and Secondary Frontages are not proposed.</p>	<p>Due to the size and compactness of Abbots Langley, the proposed Primary Shopping Area is the same as the proposed District Centre Boundary.</p> <p>Three Rivers District Council will be considering designating Primary and Secondary Frontages for Abbots Langley as the new Local Plan progresses.</p>

Centre	Changes proposed to Town Centre, Primary Shopping Area and Primary and Secondary Shopping Frontages	Justification
Chorleywood	<p>Proposals include the creation of a Town Centre Boundary and Primary Shopping Area.</p> <p>The proposed Town Centre Boundary incorporates all adopted Primary and Secondary Frontages as identified in the adopted Policies Map.</p> <p>The proposed Primary Shopping Area incorporates all units with frontage to Lower Road and Whitelands Avenue.</p> <p>Primary and Secondary Frontages are not identified.</p>	<p>The proposed Primary Shopping Area reflects the main retail uses within the town centre.</p> <p>Three Rivers District Council will be considering designating Primary and Secondary Frontages for Chorleywood as the new Local Plan progresses.</p>
St Albans City and District Council		
St Albans	Proposals include the creation of a Primary Shopping Area including Primary and Secondary Frontages.	

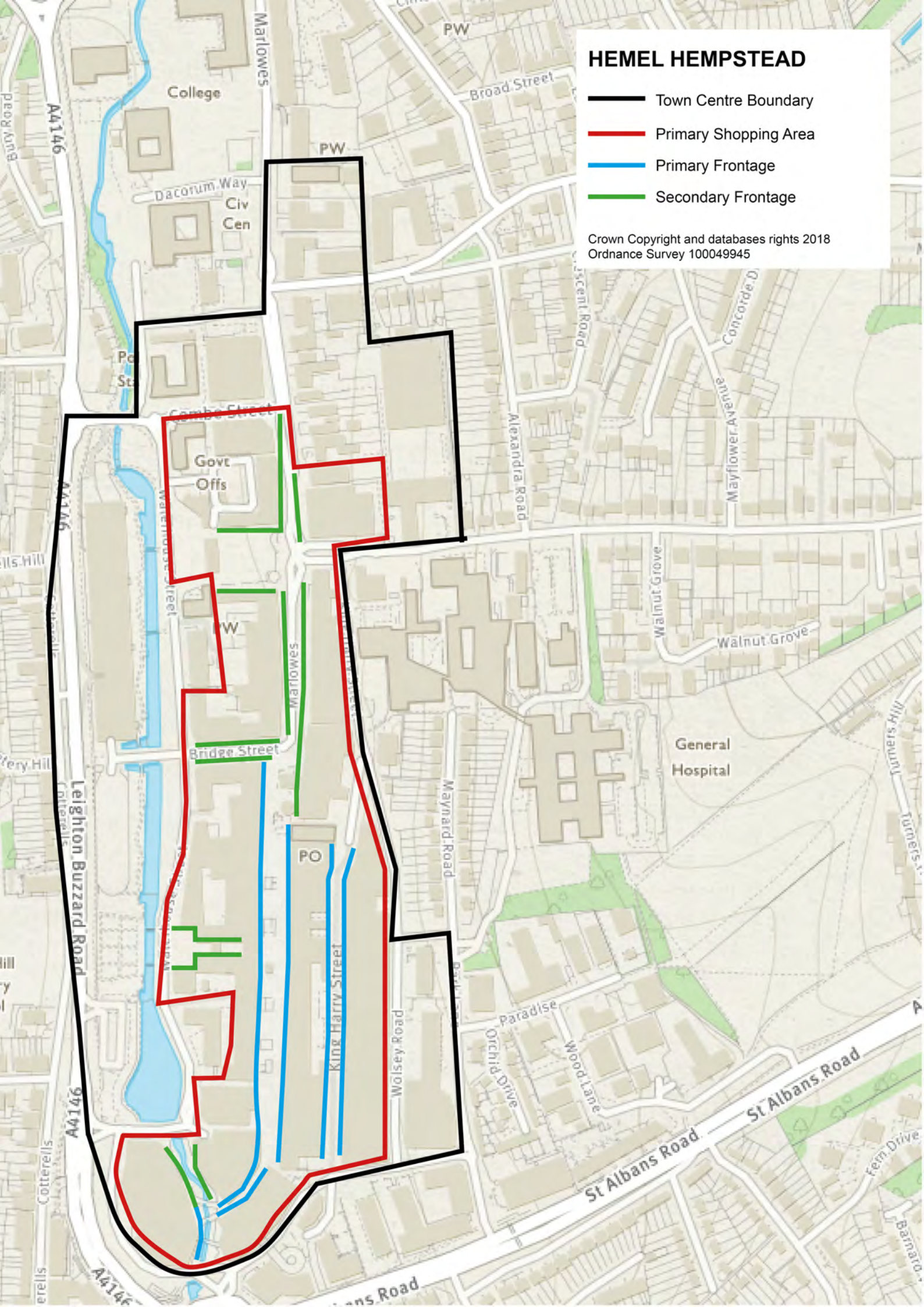
Centre	Changes proposed to Town Centre, Primary Shopping Area and Primary and Secondary Shopping Frontages	Justification
	<p>Primary and Secondary Frontages and the Town Centre Boundary are as identified in the emerging Local Plan.</p>	
Harpenden	<p>Proposals include the creation of a Primary Shopping Area including Primary and Secondary Frontages</p> <p>Primary and Secondary Frontages and the Town Centre Boundary are as identified in the emerging Local Plan.</p>	
Watford Borough Council		
Watford	<p>Proposals include the contraction of the Town Centre Boundary to the north to include the leisure centre and Council offices.</p> <p>We propose to include a Primary Shopping Area encompassing the Intu redevelopment, Market Place and the High Street.</p> <p>The shopping frontage between Clarendon Road and Exchange Road is proposed to change from Primary Frontage to Secondary Frontage.</p>	<p>The facilities to the north of Rickmansworth Road (including the Leisure centre, Colosseum and Watford Library) create a lot of footfall and play an important role in the town centre, encouraging linked trips.</p> <p>The proposed Primary Shopping Area includes all Primary and Secondary Frontages as identified in the adopted Policies Map. Although units to the north of the junction of High Street and Clarendon Road offer a Secondary Frontage role (predominantly made up of food/ drink/ service units), these units still attract a fair amount of footfall and offer an important contribution to the town centre (particularly night time economy) and therefore should form part of the Primary Shopping Area.</p> <p>This area of the High Street appears separate from the High Street, south of Clarendon Road with a high presence of service units. It is therefore considered to be more reflective of Secondary Frontage. This will allow for greater flexibility of uses in the area.</p>

Centre	Changes proposed to Town Centre, Primary Shopping Area and Primary and Secondary Shopping Frontages	Justification
	<p>Queens Road north of Beecham Grove is not included within the Town Centre Boundary nor is the section of Market Street beyond Exchange Road.</p>	<p>The units to the north of Queens Road appear separate from the town centre, in particular due to the separation of the fly over. Similarly, the string of shops to the west of Exchange Road along Market Street, provide an offer more akin with a local parade of shops. These units are not easily accessible from the town centre due to the busy A Road running from north west to south east (Exchange Road).</p>
<p>Watford St Albans Road</p>	<p>A District Centre Boundary has been created as well as a Primary Shopping Area which covers a similar area to the existing Watford North Shopping Centre but includes additional units to the north.</p> <p>Primary and Secondary Frontages are not proposed.</p> <p>The large floorplate units to the south (the Range, TK Max and Office Outlet) are not included.</p> <p>The Local Centres to the north of the centre remain the same.</p>	<p>The proposed Primary Shopping Area incorporates the prime retail pitch along St Albans Road.</p> <p>To allow flexibility within the proposed Primary Shopping Area.</p> <p>These units are allocated as part of the Watford Junction Development Site.</p>

HEMEL HEMPSTEAD

-  Town Centre Boundary
-  Primary Shopping Area
-  Primary Frontage
-  Secondary Frontage

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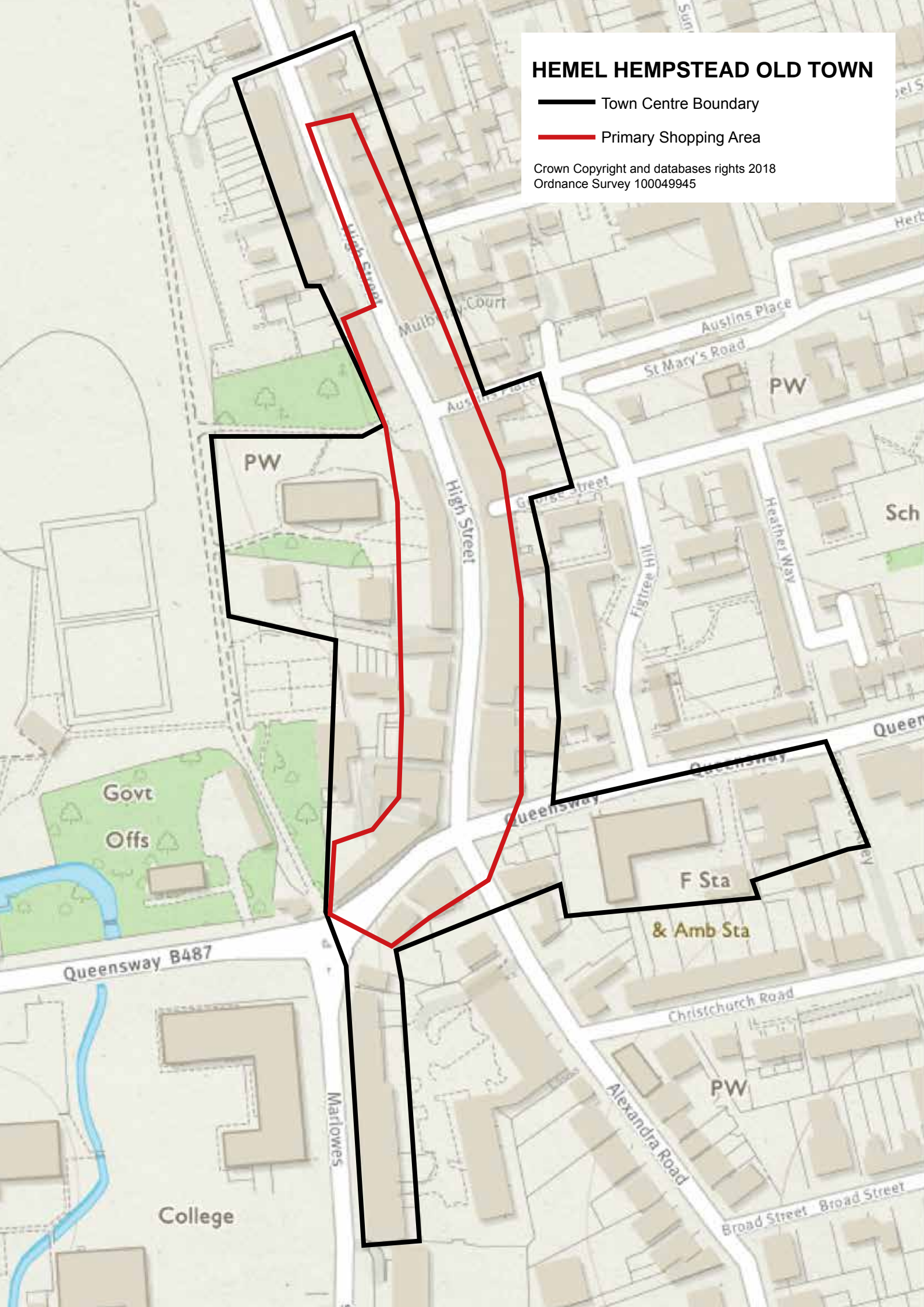


HEMEL HEMPSTEAD OLD TOWN

— Town Centre Boundary

— Primary Shopping Area

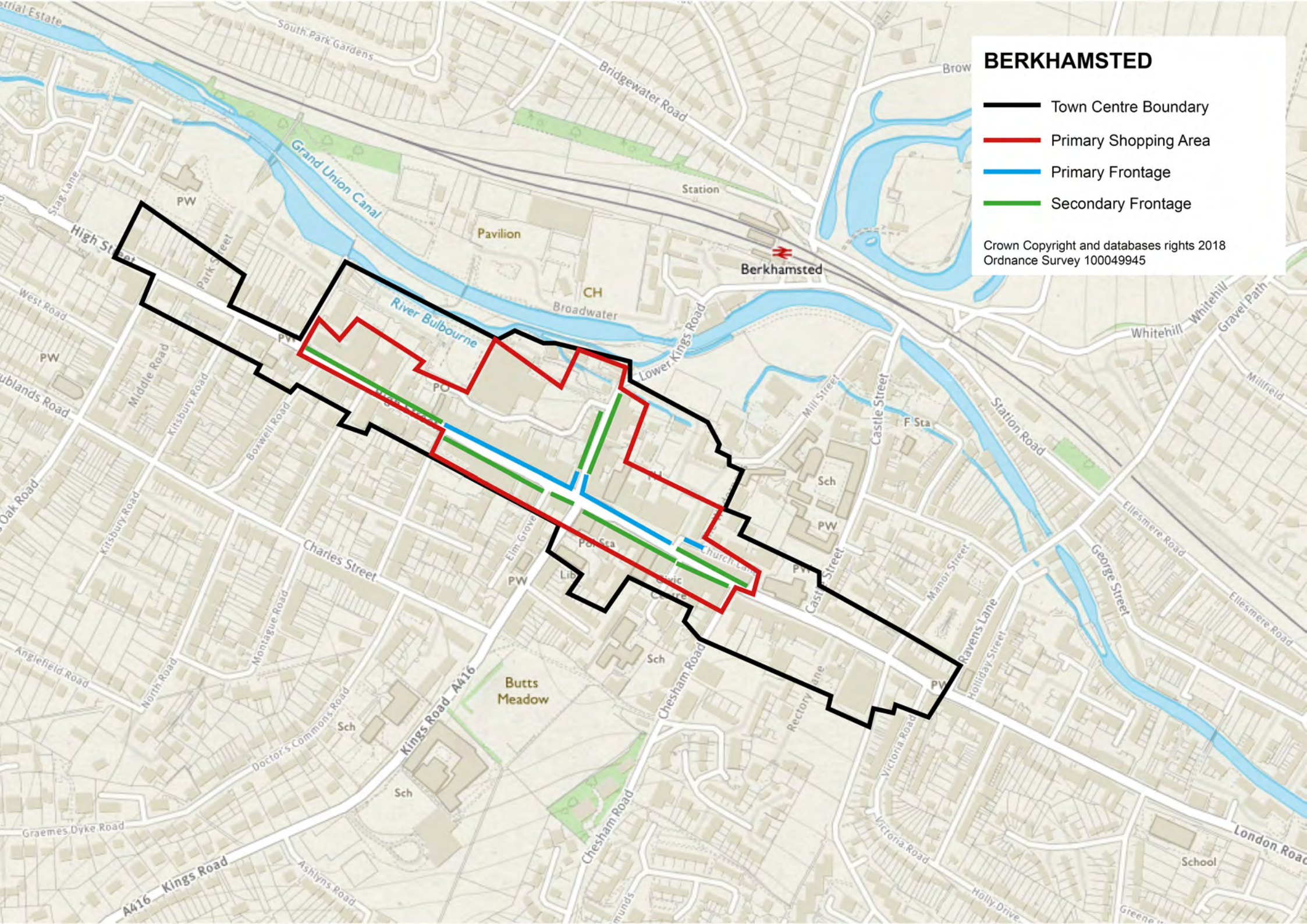
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BERKHAMSTED

-  Town Centre Boundary
-  Primary Shopping Area
-  Primary Frontage
-  Secondary Frontage

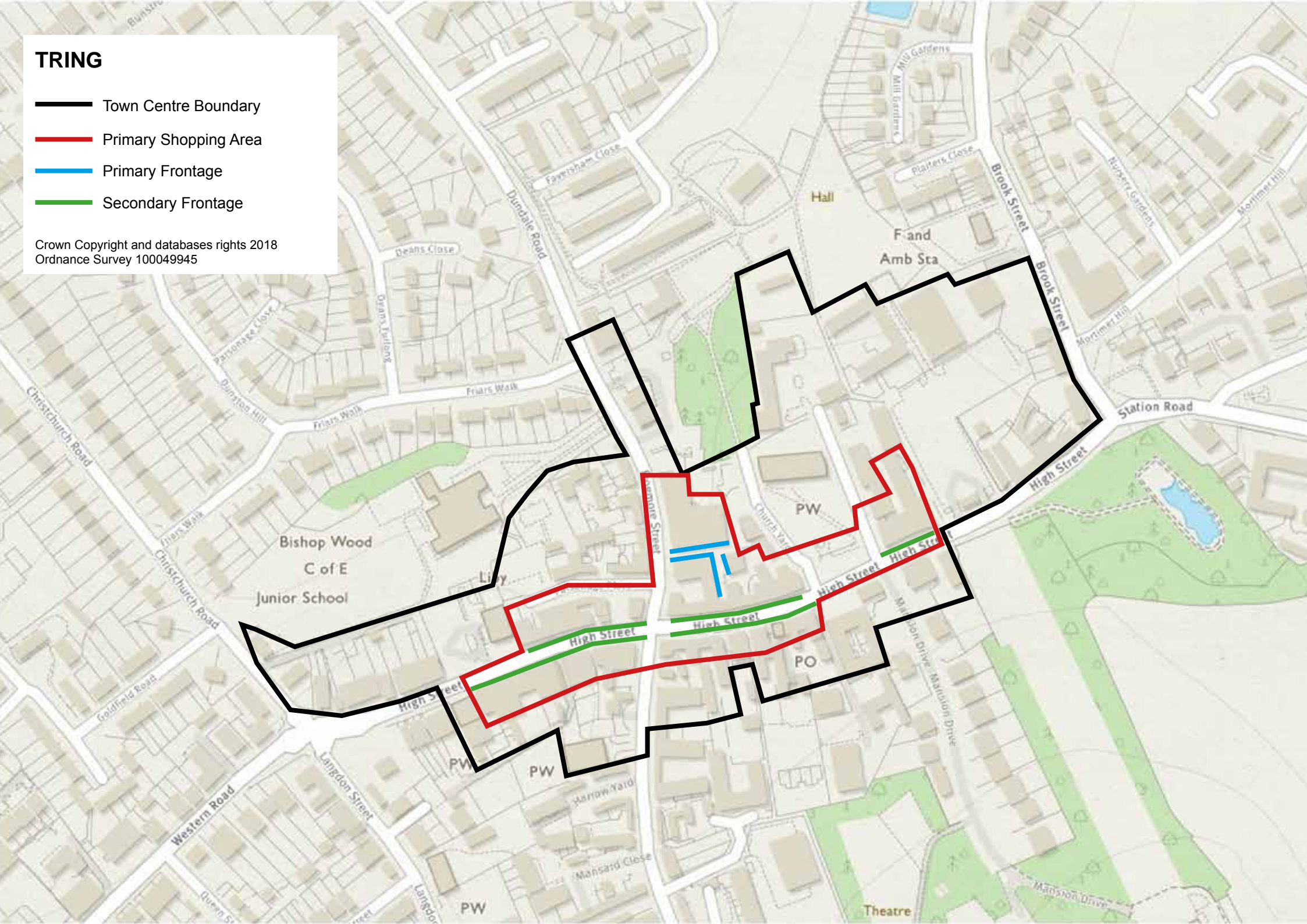
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TRING

-  Town Centre Boundary
-  Primary Shopping Area
-  Primary Frontage
-  Secondary Frontage

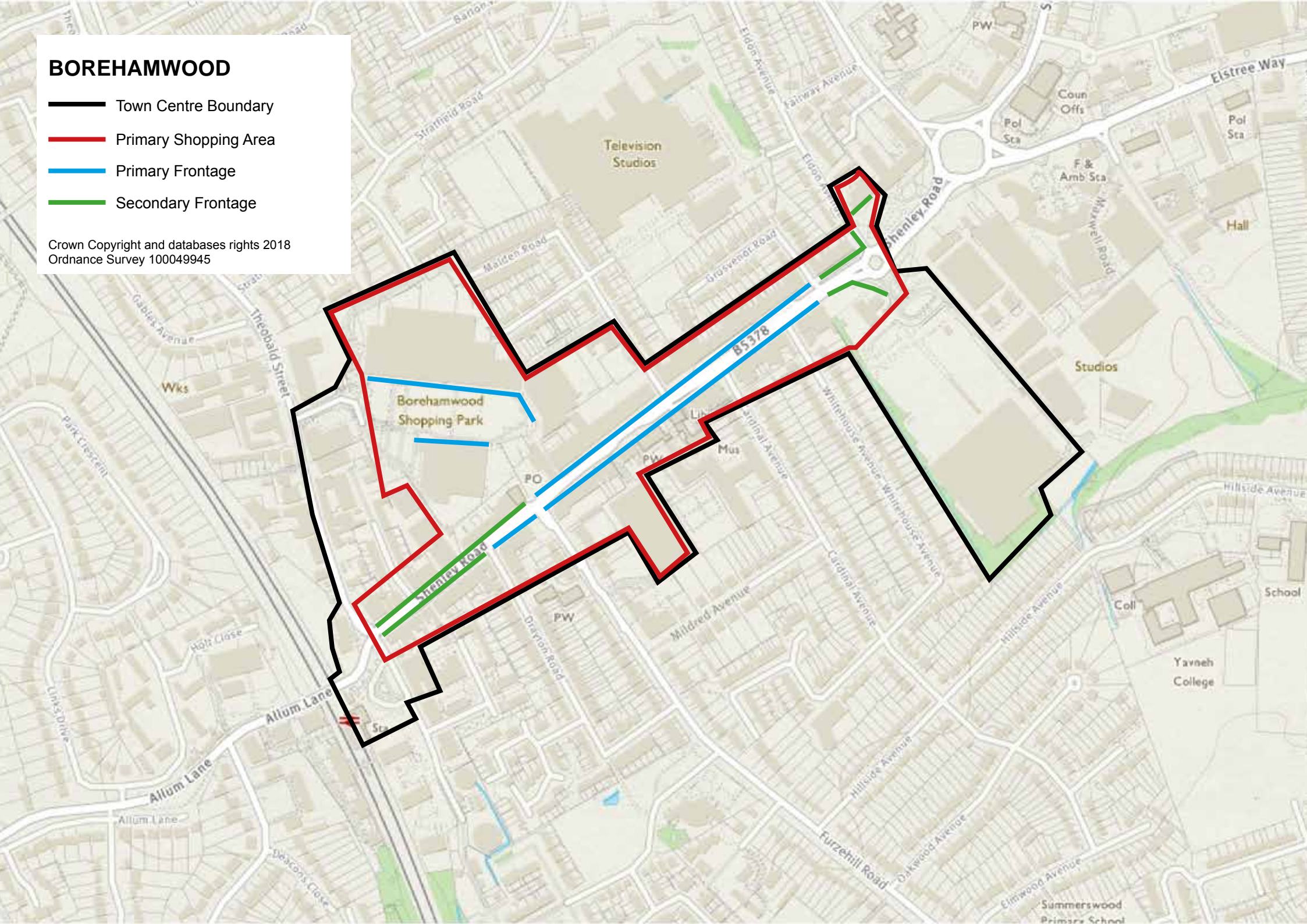
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BOREHAMWOOD

-  Town Centre Boundary
-  Primary Shopping Area
-  Primary Frontage
-  Secondary Frontage

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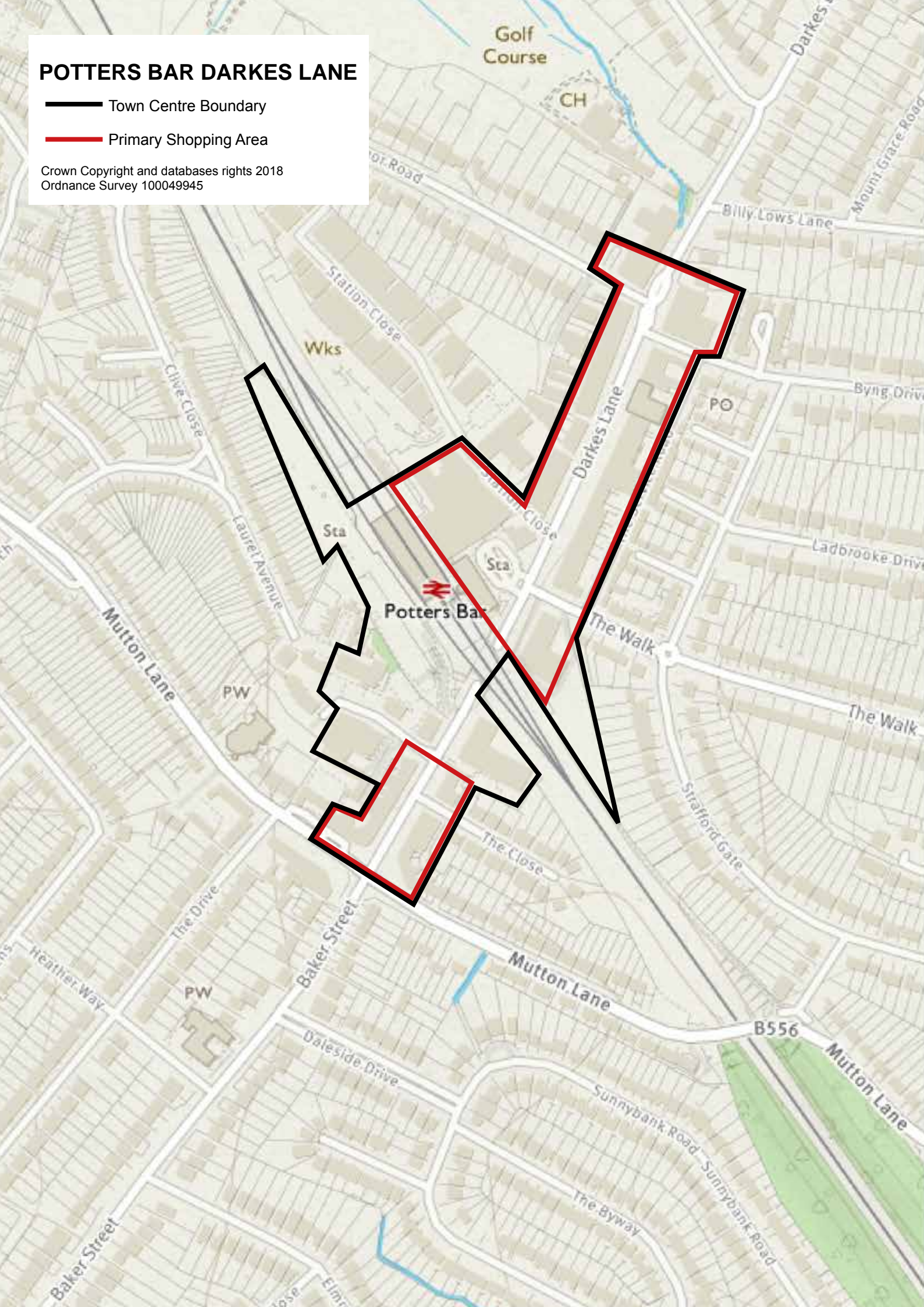


POTTERS BAR DARKES LANE

— Town Centre Boundary

— Primary Shopping Area

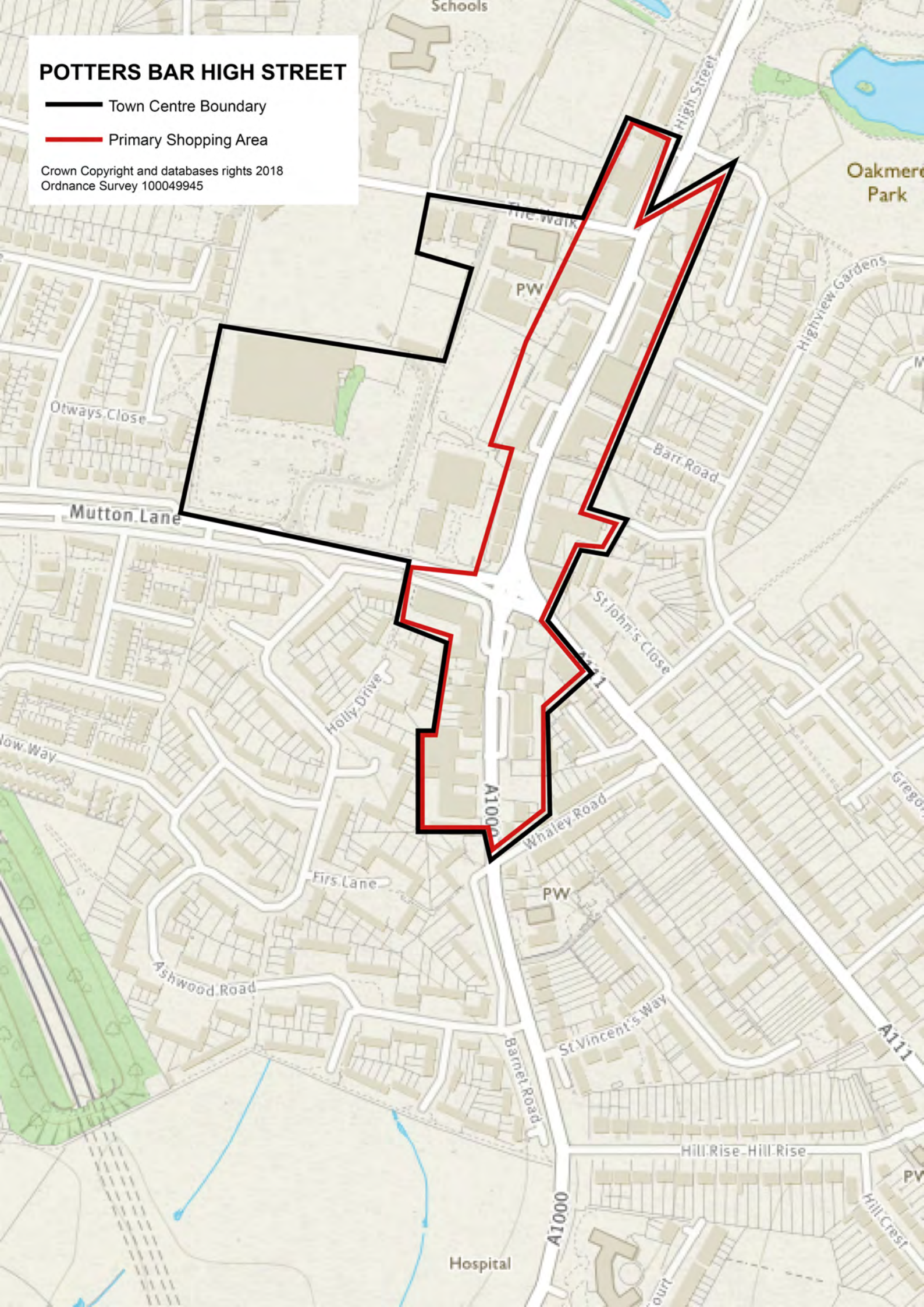
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POTTERS BAR HIGH STREET

- Town Centre Boundary
- Primary Shopping Area

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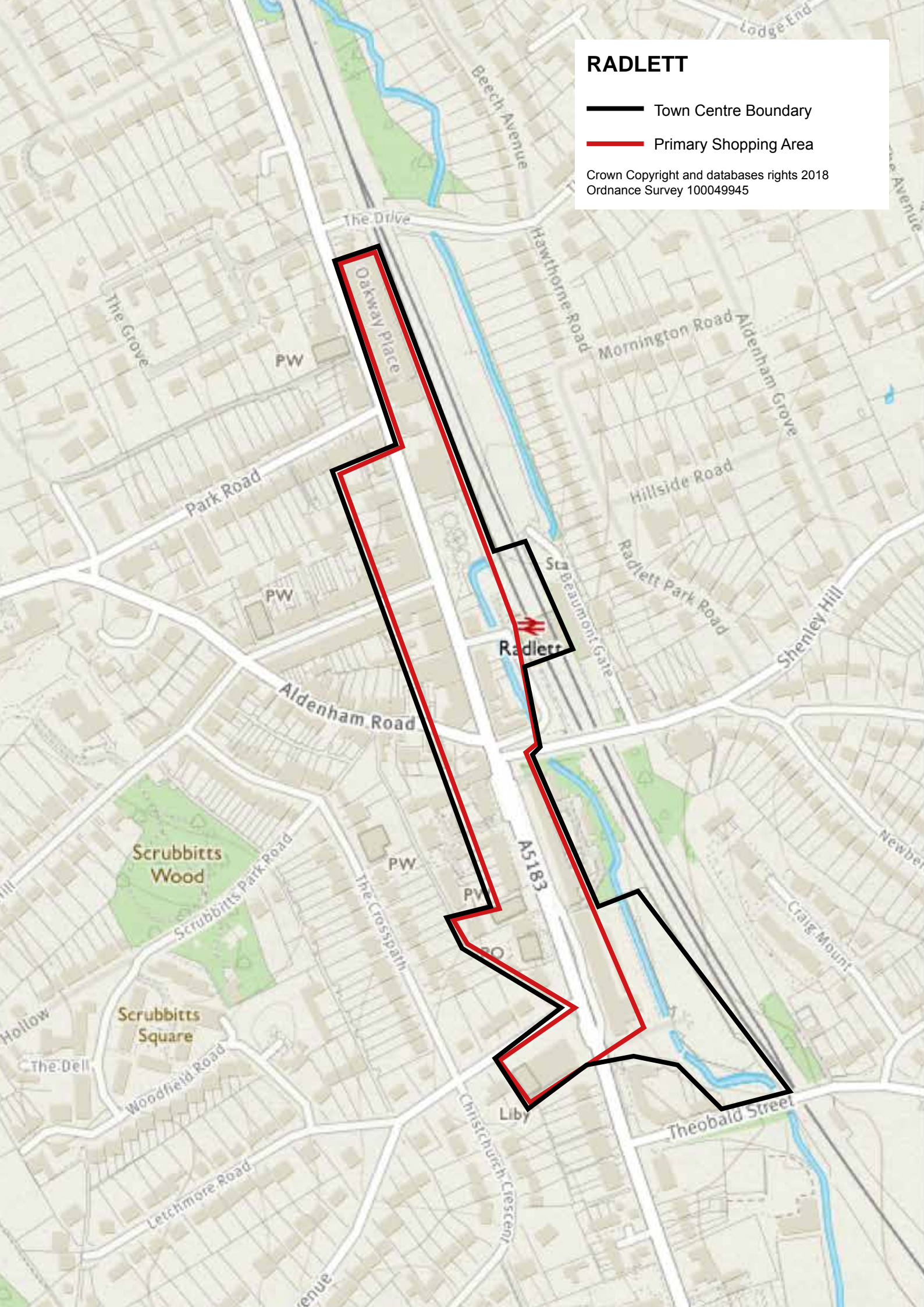


RADLETT



— Town Centre Boundary

— Primary Shopping Area

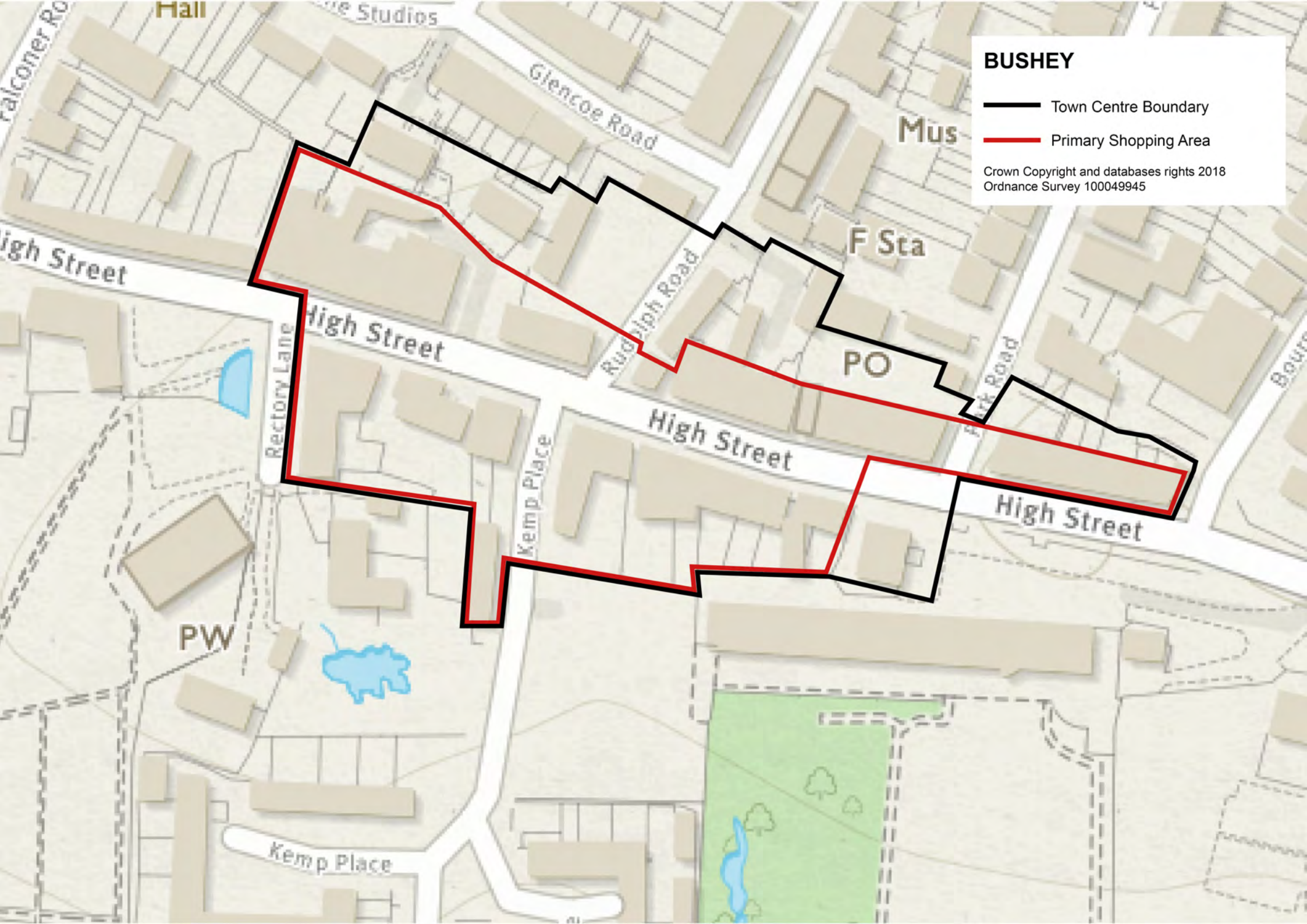
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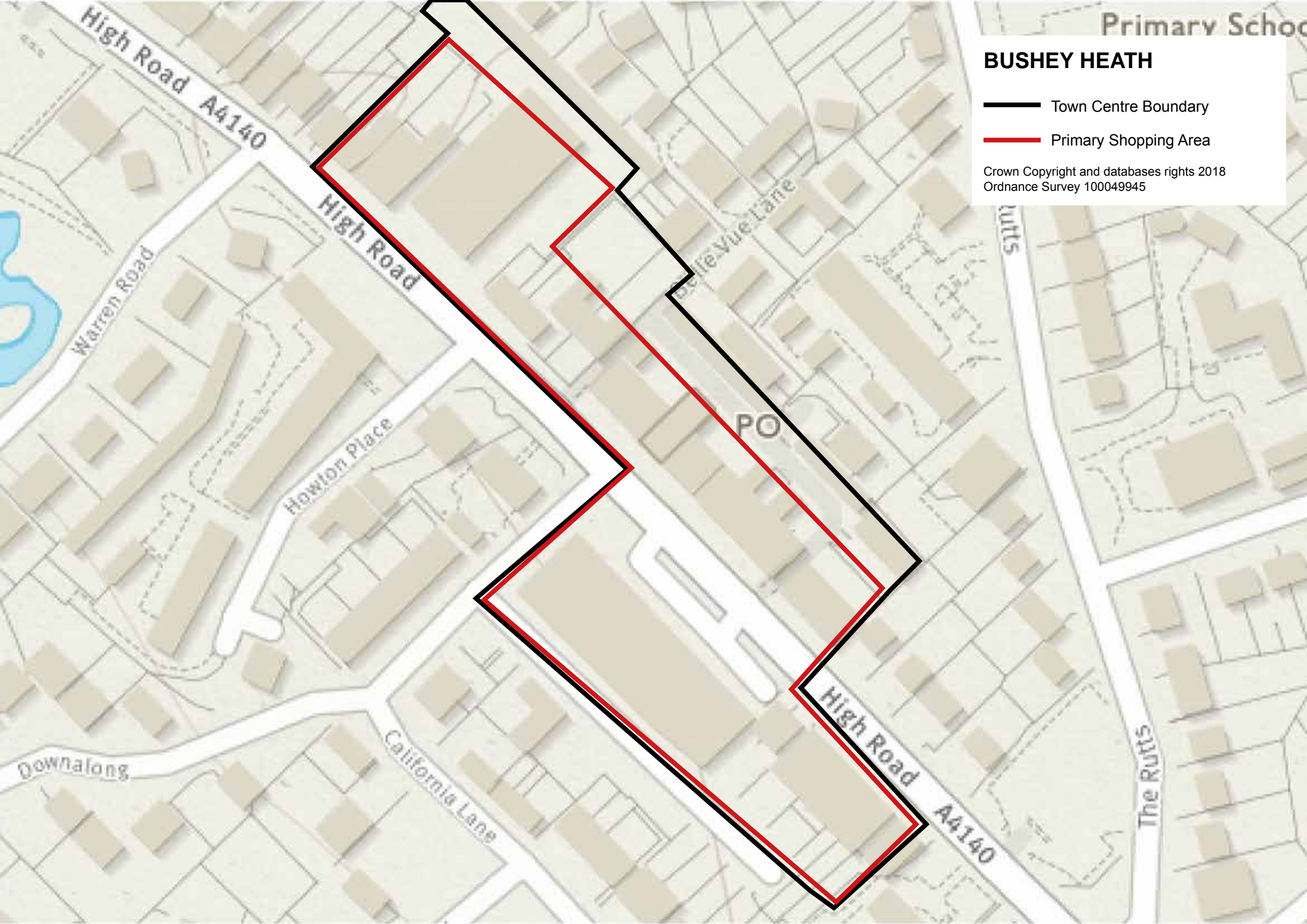


BUSHEY

-  Town Centre Boundary
-  Primary Shopping Area



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Primary School

BUSHEY HEATH

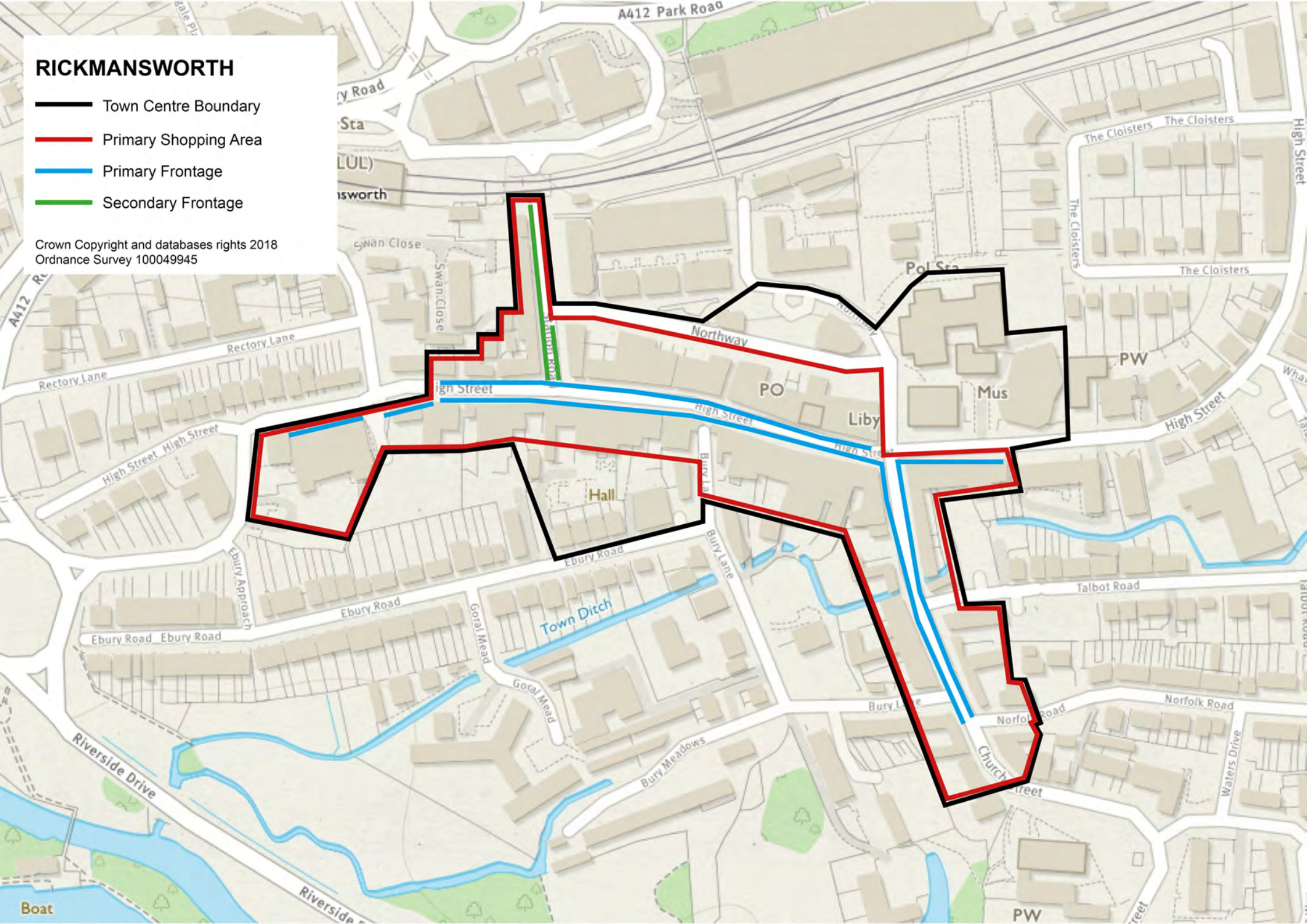
-  Town Centre Boundary
-  Primary Shopping Area

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RICKMANSWORTH

-  Town Centre Boundary
-  Primary Shopping Area
-  Primary Frontage
-  Secondary Frontage

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SOUTH OXHEY

— Town Centre Boundary

— Primary Shopping Area

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brook School

Warren Dell
Primary School

PW
Liby

Carpenders
Park
Sta

PO

PO

Hall


Poi Sca

Pond

PW

ABBOTS LANGLEY



 Town Centre Boundary

 Primary Shopping Area

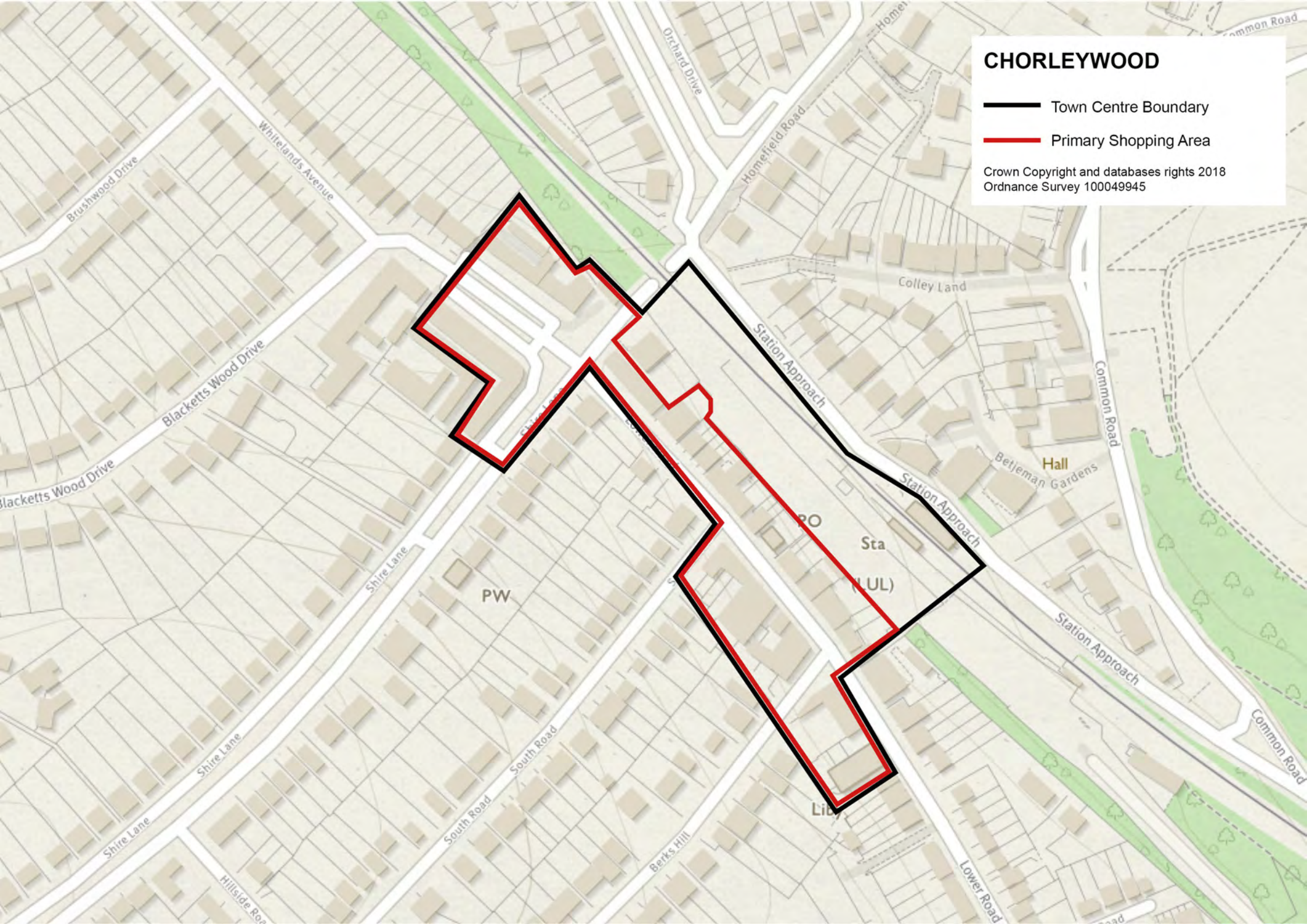
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CHORLEYWOOD

-  Town Centre Boundary
-  Primary Shopping Area

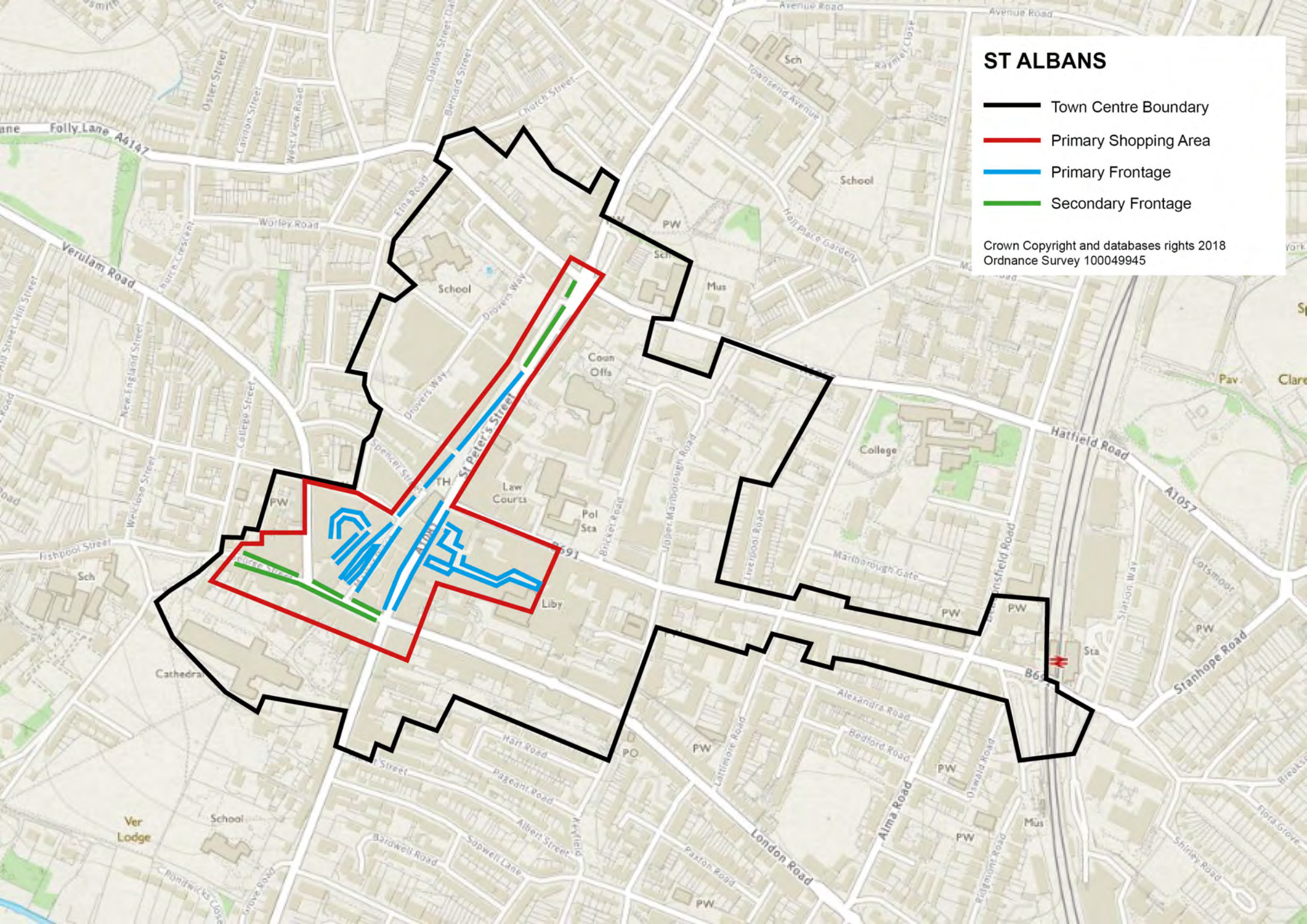
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ST ALBANS

-  Town Centre Boundary
-  Primary Shopping Area
-  Primary Frontage
-  Secondary Frontage

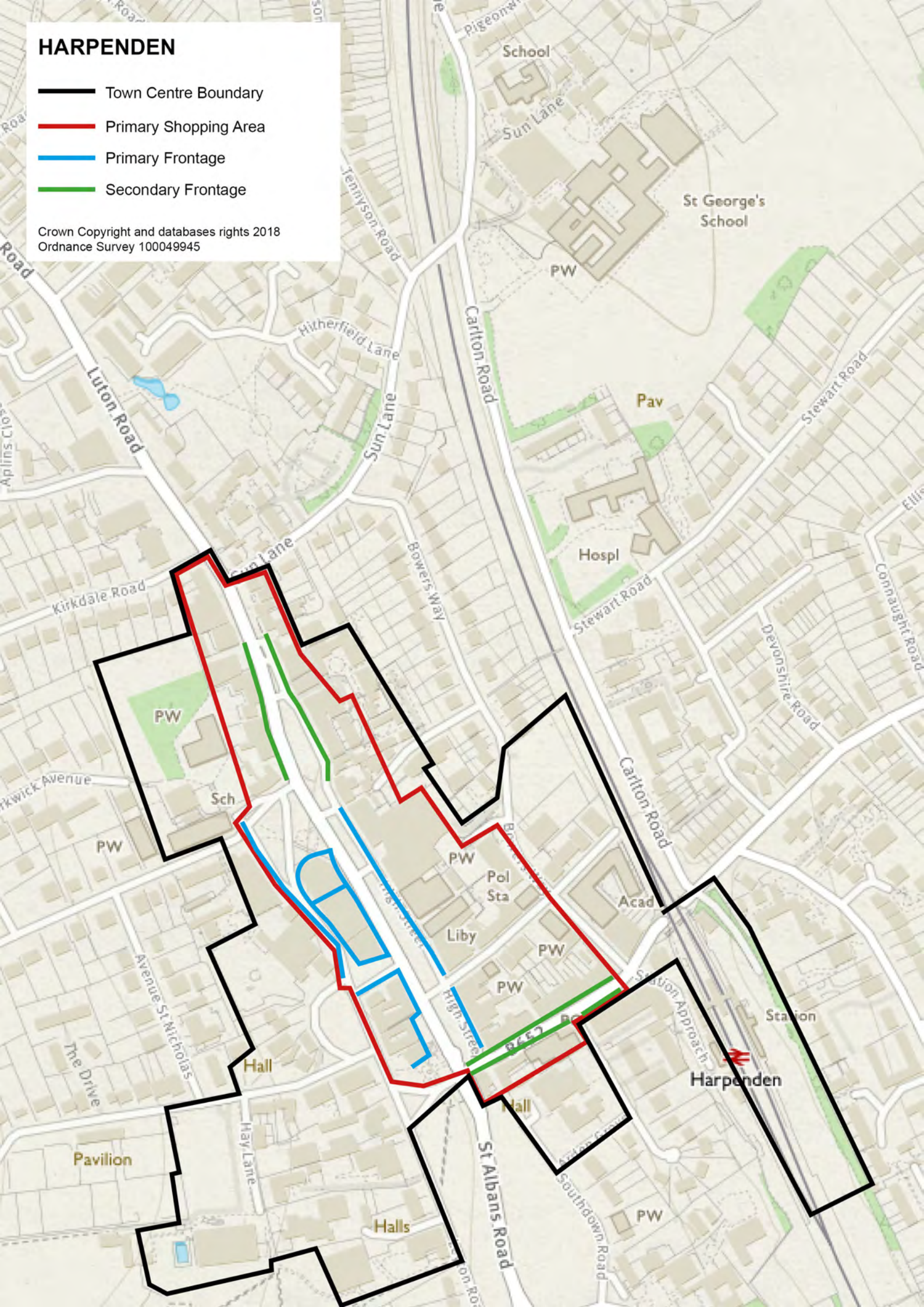
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HARPENDEN

- Town Centre Boundary
- Primary Shopping Area
- Primary Frontage
- Secondary Frontage

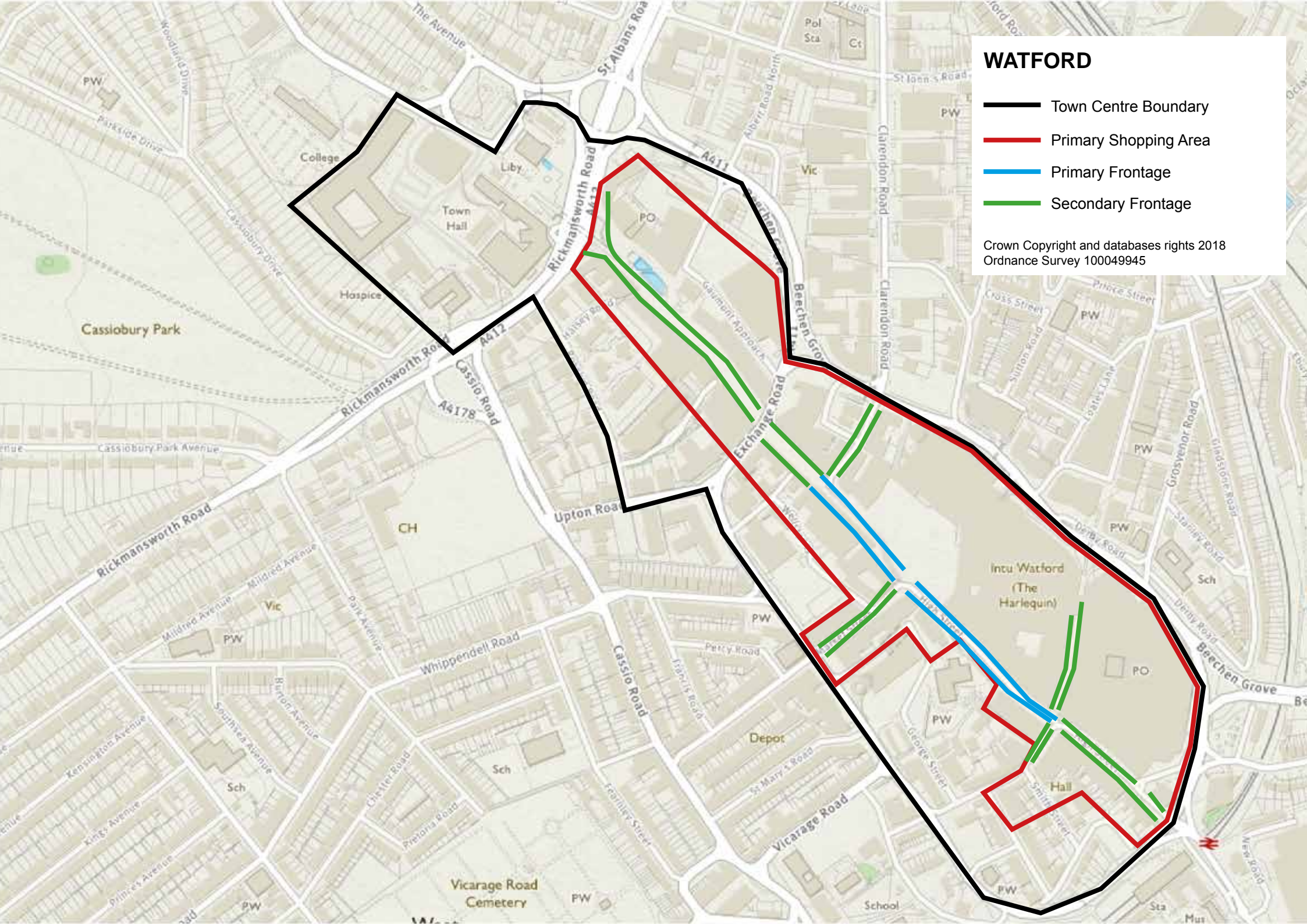
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WATFORD

-  Town Centre Boundary
-  Primary Shopping Area
-  Primary Frontage
-  Secondary Frontage

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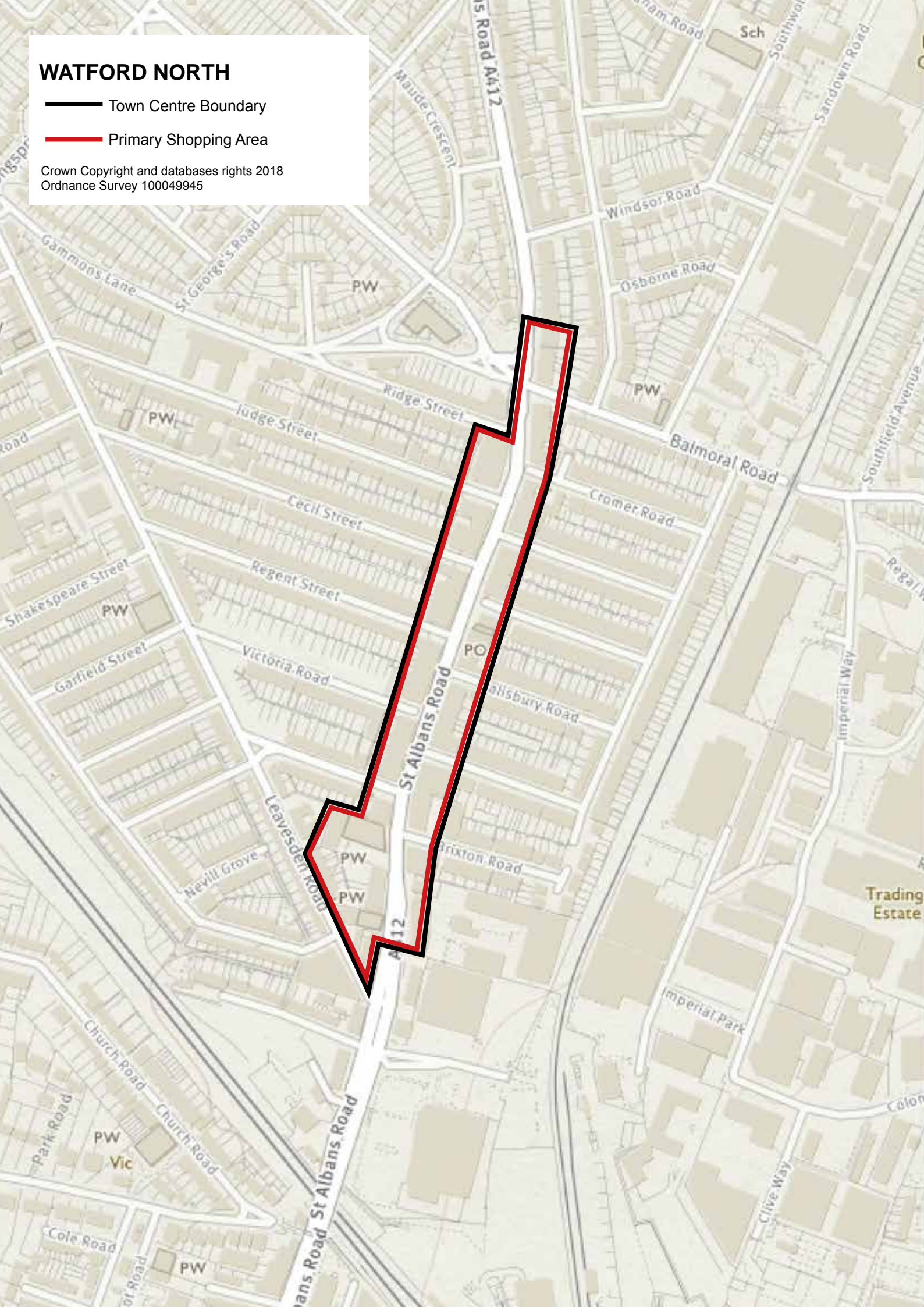


WATFORD NORTH

— Town Centre Boundary

— Primary Shopping Area

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Appendix G | Population Forecast Calculations

APPENDIX G – POPULATION NOTE

Introduction

To assess how housing potential housing growth may affect retail provision and growth in the future and how this could be accommodated in the new local plans for each of the respective South West Herts local authorities several scenarios have been considered as part of this study.

- Scenario 1: Based on the housing need figures identified for each respective local authority in the South West Hertfordshire Strategic Housing Need Assessment (2016). The methodology followed in this assessment is based on the relevant Planning Practice Guidance.
- Scenarios 2, 3, and 4: Calculated using the Government's proposed methodology to calculate housing need for local plans as set out in 'Planning for the right homes in the right places' consultation paper (2017) and the draft revised 'National Planning Policy Framework consultation proposals' paper (2018). Scenario 2 relates to the proposed methodology for local plans that have been adopted in the last five years. Scenarios 3 and 4 relate to the proposed methodology for local plans that are more than five years old.

Scenario 1	Based on the housing need figures identified for each respective local authority in the South West Hertfordshire Strategic Housing Need Assessment (2016). This scenario is intended to reflect the most up to date published objectively assessed housing need in the South West Hertfordshire area.
Scenario 2	These housing numbers are taken from the adopted Local Plan for each respective local authority plus an additional 40% added to this figure ¹ .
Scenario 3	These housing need projections are for the first ten years of the proposed new local plan periods for each respective local authority starting from 2016. Based on the 2016 ONS housing projections ² , the figures are taken from 2016-2017 to 2025-2026 ³ with an additional 40% added. They reflect the proposed growth for plans that are older than five years and can be interpreted as a high growth scenario in the short term.
Scenario 4	The figures are for the period 2016 to 2036 ⁴ and include an additional 40% added onto the projected housing need figures reflecting the proposed methodology for plans that are older than five years and can be interpreted as a high growth scenario. This scenario is intended to support an assessment for the entire plan period for each respective local authority. They are based on the 2016 ONS housing projections and reflect the Government's proposed methodology to calculate housing need. The duration of the new local plan for each respective local authority in this study may vary. Therefore, these projections should be considered indicative, particularly given their long term nature.

¹ The housing need figure for St Albans District and City Council is based upon recent average housing completions rather than figures set out in the local plan as the St Albans City and District local plan is older than adopted local plans for the other respective local authorities in this study.

² <https://www.gov.uk/government/statistical-data-sets/live-tables-on-household-projections>

³ The housing numbers for year are taken to be from April 1st to March 31st reflecting the existing approach to housing figure calculations. The ONS figures are set out to cover the period Jan 1st to Dec 31st therefore, the total housing need projection figure is inclusive of 2016 and 2026.

⁴Housing need projections figures are inclusive of 2016 and 2036.

Methodology

In order to utilise these figures, we must align a) the likely geographic spread of these dwellings, and b) the likely phasing of the dwellings with our Study Area (shown at Appendix A), before then applying them to the capacity assessments (Appendix E).

In terms of phasing, the Councils have suggested an even split over the period 2016-2036. For example, it is forecast under Scenario 1 that in Watford Borough there will be an average of 577 new dwellings per annum for the Plan period. In practice, this would differ between years, but for the purposes of our forecasting we have applied the figure of 577 dwellings to each year.

In terms of the geographic spread, none of the Councils are yet able to accurately forecast where their housing growth will be attributed i.e. between the Study Zones (see Appendix A). Accordingly, we have assumed that growth is proportioned on a pro-rata split between the existing population in each Zone. For example, using the Watford Borough example of 577 new dwellings per annum for Scenario 1, we know that Zone 1 currently accommodates 55% of the Borough's population, whilst Zone 2 accommodates the remaining 45%. We therefore attribute the new housing growth in proportion i.e. 318 dwellings per annum in Zone 1 and 259 dwellings per annum in Zone 2.

Once the Councils progress their Plans to a stage where there is more detail about the likely phasing and geography of meeting their housing need, this assessment can be undertaken again. For the purposes of the current assessment though, we consider that these assumptions are a robust basis for assessment.

Building on the above, we are then able to apportion the proposed population by Zone and by year. We adopt an average household size of 2.4 (2011 Census for the Inner Study Area) for the purposes of our calculations under each scenario. 'Base population' is taken from Experian MMG3 reports for each Zone.

We set out the resultant population growth forecasts under each Scenario below. The figures set out under these four scenarios are then utilised to form the basis for Table 1 under each Scenario at Appendix E.

Note that the population projections for Zones falling outside the Inner Study Area (i.e. Zones 15, 16, 17, 20 and 22) are projected forwards on the basis of Experian MMG3 estimates.

Scenario 1

	Zone	Location	LPA Dwellings PA	Existing Popn Split	Zone Dwellings PA	Persons Per H'Hold	New Population PA
Watford	1	Zone 1 Watford South	577	55.0%	318	2.4	762
	2	Zone 2 Watford North		45.0%	259	2.4	623
Hertsmere	3	Zone 3 Bushey & Aldenham	599	20.8%	125	2.4	299
	4	Zone 4 Radlett & Shenley		13.4%	80	2.4	193
	5	Zone 5 Borehamwood & Elstree		40.4%	242	2.4	581
	6	Zone 6 Potters Bar		25.4%	152	2.4	365
Three Rivers	7	Zone 7 Rickmansworth	514	27.0%	139	2.4	333
	8	Zone 8 Batchworth Heath & South Oxhey		33.2%	170	2.4	409
	9	Zone 9 Chorleywood & Sarratt		16.1%	83	2.4	199
	10	Zone 10 Kings Langley & Abbots Langley		23.8%	122	2.4	293
Dacorum	11	Zone 11 Hemel Hempstead	756	46.1%	349	2.4	837
	12	Zone 12 Hemel Hempstead Fringe		26.3%	199	2.4	477
	13	Zone 13 Berkhamsted		17.5%	132	2.4	317
	14	Zone 14 Tring		10.1%	76	2.4	183
St Albans	18	Zone 18 St Albans	639	58.0%	370	2.4	889
	19	Zone 19 London Colney Fringe		21.3%	136	2.4	327
	21	Zone 21 Harpenden		20.7%	132	2.4	317
Total					3,085		7,404

Scenario 2

	Zone	Location	LPA Dwellings PA	Existing Popn Split	Zone Dwellings PA	Persons Per H'Hold	New Population PA
Watford	1	Zone 1 Watford South	364	55.0%	200	2.4	481
	2	Zone 2 Watford North		45.0%	164	2.4	393
Hertsmere	3	Zone 3 Bushey & Aldenham	372	20.8%	77	2.4	186
	4	Zone 4 Radlett & Shenley		13.4%	50	2.4	120
	5	Zone 5 Borehamwood & Elstree		40.4%	150	2.4	361
	6	Zone 6 Potters Bar		25.4%	94	2.4	226
Three Rivers	7	Zone 7 Rickmansworth	252	27.0%	68	2.4	163
	8	Zone 8 Batchworth Heath & South Oxhey		33.2%	84	2.4	201
	9	Zone 9 Chorleywood & Sarratt		16.1%	41	2.4	97
	10	Zone 10 Kings Langley & Abbots Langley		23.8%	60	2.4	144
Dacorum	11	Zone 11 Hemel Hempstead	602	46.1%	278	2.4	667
	12	Zone 12 Hemel Hempstead Fringe		26.3%	158	2.4	380
	13	Zone 13 Berkhamsted		17.5%	105	2.4	252
	14	Zone 14 Tring		10.1%	61	2.4	146
St Albans	18	Zone 18 St Albans	504	58.0%	292	2.4	701
	19	Zone 19 London Colney Fringe		21.3%	108	2.4	258
	21	Zone 21 Harpenden		20.7%	104	2.4	250
Total					2,094		5,026

Scenario 3

	Zone	Location	LPA Dwellings PA	Existing Popn Split	Zone Dwellings PA	Persons Per H'Hold	New Population PA
Watford	1	Zone 1 Watford South	840	55.0%	462	2.4	1,110
	2	Zone 2 Watford North		45.0%	378	2.4	906
Hertsmere	3	Zone 3 Bushey & Aldenham	700	20.8%	146	2.4	349
	4	Zone 4 Radlett & Shenley		13.4%	94	2.4	225
	5	Zone 5 Borehamwood & Elstree		40.4%	283	2.4	679
	6	Zone 6 Potters Bar		25.4%	178	2.4	426
Three Rivers	7	Zone 7 Rickmansworth	560	27.0%	151	2.4	363
	8	Zone 8 Batchworth Heath & South Oxhey		33.2%	186	2.4	446
	9	Zone 9 Chorleywood & Sarratt		16.1%	90	2.4	216
	10	Zone 10 Kings Langley & Abbots Langley		23.8%	133	2.4	319
Dacorum	11	Zone 11 Hemel Hempstead	980	46.1%	452	2.4	1,085
	12	Zone 12 Hemel Hempstead Fringe		26.3%	258	2.4	619
	13	Zone 13 Berkhamsted		17.5%	171	2.4	411
	14	Zone 14 Tring		10.1%	99	2.4	237
St Albans	18	Zone 18 St Albans	980	58.0%	568	2.4	1,363
	19	Zone 19 London Colney Fringe		21.3%	209	2.4	502
	21	Zone 21 Harpenden		20.7%	203	2.4	487
Total					4,060		9,744

Scenario 4

	Zone	Location	LPA Dwellings PA	Existing Popn Split	Zone Dwellings PA	Persons Per H'Hold	New Population PA
Watford	1	Zone 1 Watford South	770	55.0%	424	2.4	1,017
	2	Zone 2 Watford North		45.0%	346	2.4	831
Hertsmere	3	Zone 3 Bushey & Aldenham	700	20.8%	146	2.4	349
	4	Zone 4 Radlett & Shenley		13.4%	94	2.4	225
	5	Zone 5 Borehamwood & Elstree		40.4%	283	2.4	679
	6	Zone 6 Potters Bar		25.4%	178	2.4	426
Three Rivers	7	Zone 7 Rickmansworth	630	27.0%	170	2.4	408
	8	Zone 8 Batchworth Heath & South Oxhey		33.2%	209	2.4	501
	9	Zone 9 Chorleywood & Sarratt		16.1%	101	2.4	243
	10	Zone 10 Kings Langley & Abbots Langley		23.8%	150	2.4	359
Dacorum	11	Zone 11 Hemel Hempstead	1,096	46.1%	506	2.4	1,214
	12	Zone 12 Hemel Hempstead Fringe		26.3%	288	2.4	692
	13	Zone 13 Berkhamsted		17.5%	191	2.4	459
	14	Zone 14 Tring		10.1%	111	2.4	265
St Albans	18	Zone 18 St Albans	875	58.0%	507	2.4	1,217
	19	Zone 19 London Colney Fringe		21.3%	187	2.4	448
	21	Zone 21 Harpenden		20.7%	181	2.4	435
Total					4,071		9,770

Appendix H | Leisure Capacity Tables – Low Growth Scenario

South West Hertfordshire Retail & Leisure Study

Nexus Planning

Table 1: Population (Scenario 4)

Zone	2017	2021	2026	2031	2036
1	63,649	67,718	72,803	77,889	82,975
2	51,994	55,317	59,472	63,626	67,780
3	20,825	22,223	23,969	25,716	27,462
4	13,439	14,341	15,468	16,595	17,723
5	40,486	43,203	46,598	49,994	53,389
6	25,405	27,110	29,240	31,371	33,502
7	27,350	28,982	31,022	33,063	35,103
8	33,601	35,607	38,113	40,620	43,126
9	16,314	17,288	18,505	19,722	20,939
10	24,080	25,517	27,314	29,110	30,906
11	67,203	72,058	78,126	84,195	90,264
12	38,306	41,073	44,532	47,992	51,451
13	25,440	27,278	29,576	31,873	34,171
14	14,691	15,753	17,079	18,406	19,733
15	201,793	209,921	218,799	226,809	233,987
16	50,286	51,866	53,772	55,511	57,159
17	98,752	104,129	110,301	115,553	120,278
18	95,887	100,757	106,844	112,931	119,018
19	35,284	37,076	39,316	41,556	43,795
20	200,121	209,670	220,104	229,504	238,385
21	34,234	35,972	38,145	40,319	42,492
22	62,274	65,108	68,438	71,558	74,218
Total	1,241,416	1,307,966	1,387,538	1,463,911	1,537,855

Notes:

a. Zones based on the post code sectors shown on the plan at Appendix A

b. 2016 Population derived from Experian MMG3 data (2018 report). Projections to 2036 are based on the figures set out in the Population Note at Appendix G.

South West Hertfordshire Retail & Leisure Study

Nexus Planning

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

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

Notes:

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

2016 Prices

South West Hertfordshire Retail & Leisure Study

Nexus Planning

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

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

Notes:

a. Table 1 x Table 2

2016 Prices

South West Hertfordshire Retail & Leisure Study
Nexus Planning

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

Destination	Watford		Hertsmere				Three Rivers				Dacorum				St.Albans				Inflow			
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 18	Zone 19	Zone 21	Zone 15	Zone 16	Zone 17	Zone 20	Zone 22
Watford	69.6	54.3	12.6	4.0	7.3	1.5	16.5	20.6	11.6	21.6	0.8	2.7	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.0	15.5	0.0
Others Watford	0.0	2.7	0.0	3.2	0.0	0.0	0.0	0.8	0.0	1.0	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total Watford	69.6	57.1	12.6	7.2	7.3	1.5	16.5	21.4	11.6	22.6	0.8	3.5	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.0	15.5	0.0
Bushey	5.1	1.4	42.7	3.9	1.0	0.0	0.0	3.2	1.3	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	1.0	0.0
Radlett	4.0	0.7	4.0	36.0	13.7	2.3	0.0	0.0	0.0	1.3	0.0	0.0	0.0	0.0	4.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Borehamwood	0.0	0.0	0.8	5.6	34.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0
Potters Bar	0.0	0.0	0.0	1.1	0.0	71.6	0.0	0.0	0.0	0.0	0.8	0.0	0.0	0.0	0.0	16.3	0.0	0.0	0.0	0.0	2.1	0.0
Others Hertsmere	0.0	0.7	0.8	6.9	3.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total Hertsmere	9.2	2.7	48.3	53.5	52.4	75.4	0.0	3.2	1.3	2.6	0.0	0.8	0.0	0.0	4.5	16.3	0.0	0.9	0.0	0.0	4.2	0.0
Rickmansworth	4.8	0.7	0.0	0.0	0.0	0.0	47.1	2.4	25.6	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.8	0.0	0.0	0.0	0.0
Others Three Rivers	4.3	8.3	1.6	0.0	2.0	0.0	19.2	5.4	16.4	18.3	0.8	1.1	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.0	1.0	0.0
Sub-total Tree Rivers	9.1	9.0	1.6	0.0	2.0	0.0	66.3	7.8	42.0	19.3	0.8	1.1	0.0	0.0	0.8	0.0	0.0	1.8	0.0	0.0	1.0	0.0
Hemel Hempstead	0.0	0.0	1.1	0.0	0.0	0.0	0.9	0.0	2.7	13.7	56.7	39.7	9.6	3.9	5.3	0.0	0.9	0.0	3.6	0.0	0.0	0.0
Berkhamsted	0.0	0.7	0.0	0.8	0.0	0.0	0.0	0.0	1.0	12.3	1.6	10.4	66.4	20.0	0.0	0.0	0.0	0.0	19.4	5.4	0.0	3.0
Tring	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0	4.4	50.2	0.0	0.0	0.0	0.0	0.0	10.6	2.7	0.0	0.0
Others Dacorum	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	2.3	4.2	13.8	2.7	0.8	0.0	0.8	0.0	0.0	0.9	0.9	3.1	0.0	0.0
Sub-total Dacorum	0.0	2.1	1.1	0.8	0.0	0.0	0.9	0.0	6.0	30.1	73.1	52.8	81.2	74.0	6.1	0.0	0.9	0.9	34.5	11.1	0.0	3.0
St Albans	0.0	3.4	0.8	15.7	4.8	6.8	0.7	1.1	1.0	7.1	8.3	1.6	0.8	0.0	62.0	20.8	11.0	0.0	0.9	0.0	0.0	5.6
Harpenden	0.0	0.0	0.0	0.8	0.0	1.1	0.0	0.0	0.0	1.0	0.0	1.6	0.0	0.0	6.2	0.0	68.6	0.0	0.0	1.3	0.0	4.8
Others St Albans	0.8	0.7	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.0	1.9	0.8	0.0	0.0	5.9	9.0	4.1	0.0	0.0	0.0	0.0	2.8
Sub-total St Albans	0.8	4.1	0.8	16.5	4.8	7.9	1.4	1.1	1.0	8.1	10.2	4.1	0.8	0.0	74.0	29.8	83.7	0.0	0.9	1.3	0.0	13.1
Sub-total Authority Areas	88.7	75.0	64.4	78.0	66.5	84.8	85.0	33.4	61.9	82.7	84.9	62.2	81.9	74.0	85.4	46.1	84.6	4.9	35.4	12.5	20.7	16.1
Central London	4.3	11.1	19.2	7.4	10.3	2.3	8.3	13.6	11.0	4.2	12.0	13.3	3.6	9.6	9.8	8.1	5.6	4.7	4.8	5.3	6.6	3.8
Eastcote	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.6	0.0	0.0	0.0	0.0
Harrow	3.2	2.7	0.0	0.0	0.0	0.0	0.0	1.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.8	0.0	0.0	3.6	0.0
Hatch End	0.0	7.6	1.6	0.0	2.0	0.0	0.0	8.5	4.0	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	13.8	0.0	0.0	8.7	0.0
Pinner	0.0	0.0	0.8	0.0	0.0	0.0	0.7	1.6	4.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.1	0.0	0.0	1.5	0.0
Ruislip	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.8	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	15.0	0.0	0.0	0.0	0.0
Dunstable	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0	0.0	0.0	0.0	22.3	0.0	1.5
Leighton Buzzard	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.0	30.4	0.0	0.0
Northwood	0.8	0.7	0.0	0.0	0.0	0.0	2.6	24.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.1	0.0	0.0	0.0	0.0
Barnet	0.0	0.0	0.0	1.3	5.2	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	14.9	0.0
Stanmore	0.0	0.7	5.0	0.0	2.1	0.0	0.0	8.9	0.0	3.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	13.4	0.0
Aylesbury	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0	0.0	1.1	3.1	5.4	0.0	0.0	0.0	0.0	13.9	2.6	0.0	0.0
Hatfield	0.0	0.0	0.0	3.2	1.0	1.1	0.0	0.0	0.0	0.0	0.8	0.0	0.0	0.8	18.3	1.0	0.0	0.0	0.0	0.0	0.0	11.6
Mill Hill	0.0	0.0	0.0	0.0	2.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.7	0.0
Uxbridge	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.0	0.0	0.0	0.0	0.0
Welwyn Garden City	0.0	0.0	0.0	0.0	0.0	3.4	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	1.1	4.6	1.0	0.0	0.0	0.0	0.0	36.7
Others Outside Authority Areas	3.0	1.6	8.2	10.1	10.8	7.2	3.4	2.3	18.2	6.3	3.1	22.6	11.4	10.2	1.7	23.0	7.9	18.0	45.9	26.9	17.9	30.3
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes:

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

South West Hertfordshire Retail & Leisure Study
Nexus Planning

Table 5: Food and Drink Expenditure @ 2017 (£m) (Scenario 4)

Destination	Watford		Hertsmere				Three Rivers				Dacorum				St.Albans			Inflow			Total		
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 18	Zone 19	Zone 21	Zone 15	Zone 16	Zone 17		Zone 20	Zone 22
Watford	57.2	34.4	3.9	0.9	3.4	0.5	6.8	10.2	3.4	7.3	0.7	1.3	0.0	0.0	0.0	0.0	0.0	3.2	0.0	0.0	35.0	0.0	168.2
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	3.6
Sub-total Watford	57.2	36.1	3.9	1.6	3.4	0.5	6.8	10.5	3.4	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	171.7
Bushey	4.2	0.9	13.1	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	26.6
Radlett	3.3	0.4	1.2	8.1	6.5	0.8	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	6.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	27.4
Borehamwood	0.0	0.0	0.2	1.2	16.3	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	2.4	0.0	20.2
Potters Bar	0.0	0.0	0.0	0.2	0.0	25.0	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	38.9
Others Hertsmere	0.0	0.4	0.2	1.6	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	14.8	12.0	24.7	26.4	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	117.3
Rickmansworth	4.0	0.4	0.0	0.0	0.0	0.0	19.5	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	37.4
Others Three Rivers	3.5	5.3	0.5	0.0	1.0	0.0	7.9	2.7	4.8	6.2	0.7	0.5	0.0	0.0	1.2	0.0	0.0	0.0	0.0	0.0	2.4	0.0	36.6
Sub-total Three Rivers	7.5	5.7	0.5	0.0	1.0	0.0	27.5	3.9	12.2	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	74.0
Hemel Hempstead	0.0	0.0	0.3	0.0	0.0	0.0	0.4	0.0	0.8	4.6	46.8	19.7	3.9	0.8	8.0	0.0	0.5	0.0	2.3	0.0	0.0	0.0	88.1
Berkhamsted	0.0	0.4	0.0	0.2	0.0	0.0	0.0	0.0	0.3	4.1	1.3	5.2	26.8	4.1	0.0	0.0	0.0	12.4	6.4	0.0	2.6	0.0	63.8
Tring	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	1.8	10.2	0.0	0.0	0.0	6.8	3.2	0.0	0.0	0.0	23.3
Others Dacorum	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.7	1.4	11.4	1.3	0.3	0.0	1.2	0.0	0.0	2.3	0.6	3.6	0.0	0.0	23.3
Sub-total Dacorum	0.0	1.3	0.3	0.2	0.0	0.0	0.4	0.0	1.7	10.2	60.4	26.2	32.8	15.1	9.2	0.0	0.5	2.3	22.1	13.2	0.0	2.6	198.4
St Albans	0.0	2.2	0.2	3.5	2.3	2.4	0.3	0.5	0.3	2.4	6.9	0.8	0.3	0.0	92.5	10.8	6.0	0.6	0.0	0.0	4.8	0.0	136.8
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	9.2	0.0	37.7	0.0	0.0	1.6	0.0	4.1	54.3
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	21.4
Sub-total St Albans	0.7	2.6	0.2	3.7	2.3	2.8	0.6	0.5	0.3	2.7	8.4	2.0	0.3	0.0	110.5	15.4	46.0	0.6	1.6	0.0	11.3	0.0	212.5
Sub-total Authority Areas	72.9	47.5	19.8	17.5	31.4	29.7	35.3	16.5	18.0	27.9	70.1	30.9	33.1	15.1	127.6	23.9	46.5	12.3	22.7	14.8	46.9	13.9	774.0
Central London	3.5	7.0	5.9	1.6	4.9	0.8	3.4	6.7	3.2	1.4	9.9	6.6	1.5	2.0	14.7	4.2	3.1	11.8	3.1	6.3	15.0	3.2	119.9
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	45.5
Hatch End	0.0	4.8	0.5	0.0	1.0	0.0	0.0	4.2	1.2	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	66.4
Pinner	0.0	0.0	0.2	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	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	0.0	0.2	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	0.0	1.1	12.1	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	29.7
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	36.8
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	39.1
Aylesbury	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.5	1.3	1.1	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	0.0	0.4	0.0	0.0	1.2	9.5	0.5	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	0.0	1.9	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	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	37.7
Others Outside Authority Areas	2.5	1.0	2.5	2.3	5.1	2.5	1.4	1.1	5.3	2.1	2.6	11.2	4.6	2.1	2.5	11.9	4.3	45.0	29.4	32.0	40.5	26.1	238.1
Total	82.2	63.3	30.7	22.4	47.2	35.0	41.4	49.4	29.1	33.8	82.6	49.6	40.4	20.3	149.3	51.9	55.0	250.7	64.0	118.9	226.6	86.0	1,629.9

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 4)

Destination	Watford		Hertsmere				Three Rivers				Dacorum				St Albans			Inflow			Total		
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 18	Zone 19	Zone 21	Zone 15	Zone 16	Zone 17		Zone 20	Zone 22
Watford	62.6	37.7	4.3	1.0	3.8	0.6	7.4	11.1	3.7	8.0	0.7	1.5	0.0	0.0	0.0	0.0	0.0	3.4	0.0	0.0	37.8	0.0	183.4
Others Watford	0.0	1.9	0.0	0.8	0.0	0.0	0.0	0.4	0.0	0.4	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.9
Sub-total Watford	62.6	39.6	4.3	1.8	3.8	0.6	7.4	11.5	3.7	8.3	0.7	1.9	0.0	0.0	0.0	0.0	0.0	3.4	0.0	0.0	37.8	0.0	187.3
Bushey	4.6	1.0	14.4	1.0	0.5	0.0	0.0	1.7	0.4	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.4	0.0	0.0	2.6	0.0	29.1
Radlett	3.6	0.5	1.3	8.9	7.1	0.9	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	7.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	30.0
Borehamwood	0.0	0.0	0.3	1.4	17.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.6	0.0	22.1
Potters Bar	0.0	0.0	0.0	0.3	0.0	27.5	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	9.1	0.0	0.0	0.0	0.0	5.1	0.0	42.5
Others Hertsmere	0.0	0.5	0.3	1.7	1.6	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.6
Sub-total Hertsmere	8.2	1.9	16.3	13.2	27.2	29.0	0.0	1.7	0.4	1.0	0.0	0.4	0.0	0.0	7.2	9.1	0.0	2.4	0.0	0.0	10.3	0.0	128.3
Rickmansworth	4.3	0.5	0.0	0.0	0.0	0.0	21.3	1.3	8.1	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.9	0.0	0.0	0.0	0.0	40.7
Others Three Rivers	3.9	5.8	0.5	0.0	1.1	0.0	8.7	2.9	5.2	6.8	0.7	0.6	0.0	0.0	1.3	0.0	0.0	0.0	0.0	0.0	2.6	0.0	40.0
Sub-total Three Rivers	8.2	6.2	0.5	0.0	1.1	0.0	30.0	4.2	13.3	7.1	0.7	0.6	0.0	0.0	1.3	0.0	0.0	4.9	0.0	0.0	2.6	0.0	80.7
Hemel Hempstead	0.0	0.0	0.4	0.0	0.0	0.0	0.4	0.0	0.9	5.0	51.7	21.7	4.3	0.9	8.6	0.0	0.5	0.0	2.5	0.0	0.0	0.0	96.8
Berkhamsted	0.0	0.5	0.0	0.2	0.0	0.0	0.0	0.3	4.5	1.4	5.7	29.6	4.5	0.0	0.0	0.0	0.0	13.2	6.9	0.0	2.8	0.0	69.7
Tring	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0	2.0	11.3	0.0	0.0	0.0	0.0	7.2	3.5	0.0	0.0	25.4
Others Dacorum	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.7	1.5	12.6	1.5	0.4	0.0	1.3	0.0	0.0	2.4	0.6	4.0	0.0	0.0	25.4
Sub-total Dacorum	0.0	1.4	0.4	0.2	0.0	0.0	0.4	0.0	1.9	11.1	66.6	28.9	36.2	16.6	9.9	0.0	0.5	2.4	23.5	14.3	0.0	2.8	217.3
St Albans	0.0	2.4	0.3	3.9	2.5	2.6	0.3	0.6	0.3	2.6	7.6	0.9	0.4	0.0	100.1	11.7	6.5	0.0	0.6	0.0	5.1	0.0	148.3
Harpden	0.0	0.0	0.0	0.2	0.0	0.4	0.0	0.0	0.4	0.0	0.9	0.0	0.0	0.0	9.9	0.0	40.8	0.0	0.0	1.7	0.0	4.4	58.8
Others St Albans	0.7	0.5	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	1.7	0.4	0.0	0.0	9.5	5.0	2.4	0.0	0.0	0.0	2.6	0.0	23.2
Sub-total St Albans	0.7	2.9	0.3	4.1	2.5	3.0	0.6	0.3	3.0	9.3	2.2	0.4	0.0	119.5	16.7	49.8	0.0	0.6	1.7	0.0	12.1	0.0	230.2
Sub-total Authority Areas	79.8	52.0	21.7	19.2	34.5	32.6	38.4	18.0	19.6	30.5	77.4	34.1	36.6	16.6	138.0	25.8	50.3	13.2	24.1	16.1	50.6	14.9	843.9
Central London	3.9	7.7	6.5	1.8	5.4	0.9	3.8	7.3	3.5	1.5	10.9	7.3	1.6	2.2	15.9	4.5	3.4	12.6	3.3	6.8	16.2	3.5	130.4
Eastcote	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	17.7	0.0	0.0	0.0	0.0	17.7
Harrow	2.9	1.9	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	34.4	0.0	0.0	8.8	0.0	48.9
Hatch End	0.0	5.3	0.5	0.0	1.1	0.0	0.0	4.6	1.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	37.1	0.0	0.0	21.4	0.0	71.5
Pinner	0.0	0.0	0.3	0.0	0.0	0.0	0.3	0.8	1.3	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	32.5	0.0	0.0	3.6	0.0	39.1
Ruislip	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.4	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	40.2	0.0	0.0	0.0	0.0	41.3
Dunstable	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.8	0.0	0.0	0.0	0.0	28.8	0.0	1.4	32.0
Leighton Buzzard	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	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	1.2	13.2	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	32.1
Barnet	0.0	0.0	0.0	0.3	2.7	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	36.3	0.0	39.7
Stanmore	0.0	0.5	1.7	0.0	1.1	0.0	0.0	4.8	0.0	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	32.8	0.0	42.3
Aylesbury	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.6	1.4	1.2	0.0	0.0	0.0	0.0	9.4	3.4	0.0	0.0	0.0	16.8
Hatfield	0.0	0.0	0.0	0.8	0.5	0.4	0.0	0.0	0.0	0.0	0.4	0.0	0.0	1.3	10.3	0.6	0.0	0.0	0.0	0.0	10.7	0.0	25.0
Mill Hill	0.0	0.0	0.0	0.0	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	31.0	0.0	0.0	32.1
Uxbridge	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	16.1	0.0	0.0	0.0	0.0	18.2
Welwyn Garden City	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	1.8	2.6	0.6	0.0	0.0	0.0	0.0	34.0	40.7
Others Outside Authority Areas	2.7	1.1	2.8	2.5	5.6	2.8	1.5	1.2	5.8	2.3	2.8	12.4	5.1	2.3	2.7	12.9	4.7	48.2	31.2	34.7	43.7	28.0	257.0
Total	90.0	69.3	33.7	24.6	51.8	38.4	45.2	53.9	31.7	36.8	91.2	54.8	44.6	22.4	161.5	56.1	59.5	268.5	68.0	129.1	244.4	92.5	1,768.0

Notes:

a. Table 3 x Table 4

2016 Prices

South West Hertfordshire Retail & Leisure Study
Nexus Planning

Table 7: Food and Drink Expenditure @ 2026 (£m) (Scenario 4)

Destination	Watford		Hertsmere				Three Rivers				Dacorum				St.Albans			Inflow			Total		
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 18	Zone 19	Zone 21	Zone 15	Zone 16	Zone 17		Zone 20	Zone 22
Watford	71.3	42.8	4.9	1.1	4.3	0.7	8.4	12.5	4.2	9.0	0.8	1.7	0.0	0.0	0.0	0.0	0.0	3.8	0.0	0.0	42.0	0.0	207.5
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	71.3	45.0	4.9	2.0	4.3	0.7	8.4	13.0	4.2	9.4	0.8	2.2	0.0	0.0	0.0	0.0	0.0	3.8	0.0	0.0	42.0	0.0	211.9
Bushey	5.3	1.1	16.4	1.1	0.6	0.0	0.0	1.9	0.5	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	33.0
Radlett	4.1	0.5	1.5	10.1	8.1	1.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	8.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	34.1
Borehamwood	0.0	0.0	0.3	1.6	20.5	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	2.8	0.0	25.2
Potters Bar	0.0	0.0	0.0	0.3	0.0	31.4	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	10.2	0.0	0.0	0.0	0.0	0.0	5.7	0.0	48.1
Others Hertsmere	0.0	0.5	0.3	1.9	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	5.3
Sub-total Hertsmere	9.4	2.1	18.6	15.0	31.0	33.1	0.0	1.9	0.5	1.1	0.0	0.5	0.0	0.0	8.1	10.2	0.0	2.7	0.0	0.0	11.4	0.0	145.7
Rickmansworth	4.9	0.5	0.0	0.0	0.0	0.0	24.1	1.4	9.2	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	46.0
Others Three Rivers	4.4	6.6	0.6	0.0	1.2	0.0	9.8	3.3	5.9	7.6	0.8	0.7	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	2.8	0.0	45.3
Sub-total Three Rivers	9.3	7.1	0.6	0.0	1.2	0.0	33.9	4.8	15.1	8.1	0.8	0.7	0.0	0.0	1.5	0.0	0.0	5.4	0.0	0.0	2.8	0.0	91.3
Hemel Hempstead	0.0	0.0	0.4	0.0	0.0	0.0	0.5	0.0	1.0	5.7	59.3	24.9	4.9	1.0	9.7	0.0	0.6	0.0	2.7	0.0	0.0	0.0	110.7
Berkhamsted	0.0	0.5	0.0	0.2	0.0	0.0	0.0	0.3	5.1	1.7	6.5	34.0	5.2	0.0	0.0	0.0	0.0	14.5	7.8	0.0	3.1	78.9	
Tring	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0	2.3	12.9	0.0	0.0	0.0	0.0	7.9	3.9	0.0	0.0	28.6	
Others Dacorum	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.8	1.7	14.4	1.7	0.4	0.0	1.5	0.0	0.0	2.7	0.7	4.4	0.0	0.0	0.0	28.9
Sub-total Dacorum	0.0	1.6	0.4	0.0	0.0	0.0	0.5	0.0	2.1	12.6	76.5	33.2	41.6	19.1	11.1	0.0	0.6	2.7	25.7	16.1	0.0	3.1	247.1
St Albans	0.0	2.7	0.3	4.4	2.8	3.0	0.4	0.7	0.3	3.0	8.7	1.0	0.4	0.0	112.3	13.1	7.3	0.0	0.7	0.0	0.0	5.7	166.8
Harpden	0.0	0.0	0.0	0.2	0.0	0.5	0.0	0.0	0.4	0.0	0.0	1.0	0.0	0.0	11.2	0.0	45.8	0.0	0.0	1.9	0.0	4.9	66.0
Others St Albans	0.8	0.5	0.0	0.0	0.0	0.0	0.3	0.0	0.0	1.9	0.5	0.0	0.0	10.6	5.6	2.7	0.0	0.0	0.0	0.0	2.9	0.0	26.0
Sub-total St Albans	0.8	3.3	0.3	4.6	2.8	3.5	0.7	0.3	3.4	10.7	2.6	0.4	0.0	134.1	18.7	55.9	0.0	0.7	1.9	0.0	13.5	0.0	258.8
Sub-total Authority Areas	90.8	59.1	24.8	21.9	39.3	37.2	43.6	20.4	22.2	34.5	88.8	39.1	42.0	19.1	154.8	29.0	56.5	14.6	26.4	18.0	56.2	16.6	954.8
Central London	4.4	8.7	7.4	2.1	6.1	1.0	4.3	8.3	4.0	1.7	12.6	8.4	1.8	2.5	17.8	5.1	3.8	13.9	3.6	7.7	18.0	3.9	146.9
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	3.3	2.1	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	37.9	0.0	0.0	9.8	0.0	54.2
Hatch End	0.0	6.0	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	40.9	0.0	0.0	23.7	0.0	79.5
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	35.8	0.0	0.0	4.0	0.0	43.3
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	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	2.1	0.0	0.0	0.0	0.0	32.3	0.0	1.5	35.9
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	44.0	0.0	0.0	44.2
Northwood	0.8	0.5	0.0	0.0	0.0	0.0	1.3	15.0	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	35.9
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	40.3	0.0	44.2
Stanmore	0.0	0.5	1.9	0.0	1.2	0.0	0.0	5.4	0.0	1.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	36.4	0.0	47.2
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	10.4	3.8	0.0	0.0	0.0	18.7
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	11.5	0.6	0.0	0.0	0.0	0.0	11.9	0.0	28.0
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	34.4	0.0	35.6
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	17.8	0.0	0.0	0.0	0.0	20.1
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	2.9	0.6	0.0	0.0	0.0	0.0	37.8	0.0	45.3
Others Outside Authority Areas	3.1	1.3	3.2	2.8	6.4	3.2	1.7	1.4	6.6	2.6	3.2	14.2	5.8	2.6	3.0	14.5	5.3	53.2	34.2	38.9	48.6	31.2	287.0
Total	102.4	78.9	38.5	28.1	59.2	43.8	51.2	61.0	35.9	41.7	104.6	62.9	51.2	25.8	181.2	62.9	66.8	296.1	74.6	144.7	271.5	102.9	1,985.9

Notes:

a. Table 3 x Table 4

2016 Prices

South West Hertfordshire Retail & Leisure Study
Nexus Planning

Table 8: Food and Drink Expenditure @ 2031 (£m) (Scenario 4)

Destination	Watford		Hertsmere				Three Rivers				Dacorum				St Albans			Inflow			Total			
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 18	Zone 19	Zone 21	Zone 15	Zone 16	Zone 17		Zone 20	Zone 22	
Watford	80.9	48.7	5.5	1.3	4.9	0.8	9.5	14.2	4.7	10.2	1.0	1.9	0.0	0.0	0.0	0.0	0.0	4.2	0.0	0.0	46.4	0.0	234.2	
Others Watford	0.0	2.5	0.0	1.0	0.0	0.0	0.0	0.6	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	5.1	
Sub-total Watford	80.9	51.1	5.5	2.3	4.9	0.8	9.5	14.7	4.7	10.7	1.0	2.5	0.0	0.0	0.0	0.0	0.0	4.2	0.0	0.0	46.4	0.0	239.2	
Bushey	6.0	1.2	18.7	1.3	0.7	0.0	0.0	2.2	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	37.4	
Radlett	4.7	0.6	1.7	11.5	9.3	1.1	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	9.1	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	3.2	0.0	28.6	
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	11.5	0.0	0.0	0.0	0.0	0.0	6.3	0.0	54.5	
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	10.7	2.4	21.2	17.1	35.3	37.6	0.0	2.2	0.5	1.2	0.0	0.6	0.0	0.0	9.1	11.5	0.0	3.0	0.0	0.0	12.6	0.0	165.1	
Rickmansworth	5.6	0.6	0.0	0.0	0.0	0.0	27.3	1.6	10.4	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.9	0.0	0.0	0.0	0.0	51.9	
Others Three Rivers	5.0	7.5	0.7	0.0	1.4	0.0	11.1	3.8	6.7	8.7	1.0	0.8	0.0	0.0	1.6	0.0	0.0	0.0	0.0	0.0	3.2	0.0	51.2	
Sub-total Three Rivers	10.6	8.1	0.7	0.0	1.4	0.0	38.4	5.4	17.1	9.1	1.0	0.8	0.0	0.0	1.6	0.0	0.0	5.9	0.0	0.0	3.2	0.0	103.2	
Hemel Hempstead	0.0	0.0	0.5	0.0	0.0	0.0	0.5	0.0	1.1	6.5	67.8	28.5	5.6	1.1	10.8	0.0	0.7	0.0	3.0	0.0	0.0	0.0	126.1	
Berkhamsted	0.0	0.6	0.0	0.3	0.0	0.0	0.0	0.4	5.8	1.9	7.5	38.9	5.9	0.0	0.0	0.0	0.0	15.9	8.6	0.0	3.4	0.0	89.1	
Tring	0.0	0.6	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	8.7	4.3	0.0	0.0	0.0	32.3	
Others Dacorum	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.9	2.0	16.5	1.9	0.5	0.0	1.6	0.0	0.0	3.0	0.7	4.9	0.0	0.0	0.0	32.7	
Sub-total Dacorum	0.0	1.8	0.5	0.0	0.0	0.0	0.5	0.0	2.4	14.2	87.5	37.9	47.5	21.8	12.5	0.0	0.7	3.0	28.2	17.9	0.0	3.4	0.0	280.2
St Albans	0.0	3.1	0.4	5.0	3.2	3.4	0.4	0.7	0.4	3.4	10.0	1.2	0.5	0.0	126.0	14.7	8.2	0.0	0.7	0.0	0.0	6.4	187.6	
Harpden	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	12.5	0.0	51.4	0.0	0.0	2.2	0.0	5.4	74.0	
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	11.9	6.3	3.1	0.0	0.0	0.0	0.0	3.2	29.2	
Sub-total St Albans	0.9	3.7	0.4	5.3	3.2	3.9	0.8	0.7	0.4	3.8	12.2	2.9	0.5	0.0	150.5	21.0	62.7	0.0	0.7	2.2	0.0	15.0	290.8	
Sub-total Authority Areas	103.1	67.2	28.2	24.9	44.8	42.4	49.3	23.1	25.2	39.1	101.6	44.7	48.0	21.8	173.7	32.5	63.4	16.0	28.9	20.0	62.2	18.4	1,078.4	
Central London	5.0	9.9	8.4	2.4	7.0	1.2	4.8	9.4	4.5	2.0	14.4	9.6	2.1	2.8	20.0	5.7	4.2	15.3	3.9	8.5	19.9	4.3	165.2	
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	21.5	0.0	0.0	0.0	0.0	21.5	
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	41.8	0.0	0.0	10.9	0.0	59.9	
Hatch End	0.0	6.8	0.7	0.0	1.4	0.0	0.0	5.9	1.6	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	88.1	
Pinner	0.0	0.0	0.4	0.0	0.0	0.0	0.4	1.1	1.6	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	39.4	0.0	0.0	4.4	0.0	47.8	
Ruislip	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.6	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	48.8	0.0	0.0	0.0	0.0	50.2	
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	2.3	0.0	0.0	0.0	0.0	35.9	0.0	1.7	39.9	
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	0.0	0.2	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	1.5	17.0	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	40.0	
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	44.6	0.0	49.1	
Stanmore	0.0	0.6	2.2	0.0	1.4	0.0	0.0	6.2	0.0	1.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	40.3	0.0	52.5	
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	11.4	4.2	0.0	0.0	0.0	20.7	
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	1.6	12.9	0.7	0.0	0.0	0.0	0.0	13.2	0.0	31.3	
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	38.1	0.0	39.5	
Uxbridge	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.7	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	22.2	
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	2.3	3.2	0.7	0.0	0.0	0.0	0.0	0.0	41.9	50.4	
Others Outside Authority Areas	3.5	1.4	3.6	3.2	7.3	3.6	2.0	1.6	7.4	3.0	3.7	16.3	6.7	3.0	3.4	16.2	5.9	58.5	37.5	43.3	53.8	34.6	319.4	
Total	116.3	89.5	43.8	31.9	67.4	49.9	57.9	69.0	40.7	47.2	119.7	71.9	58.6	29.5	203.3	70.6	74.9	325.9	81.7	160.9	300.5	114.2	2,225.4	

Notes:

a. Table 3 x Table 4

2016 Prices

South West Hertfordshire Retail & Leisure Study
Nexus Planning

Table 9: Food and Drink Expenditure @ 2036 (£m) (Scenario 4)

Destination	Watford		Hertsmere				Three Rivers				Dacorum				St.Albans			Inflow			Total		
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 18	Zone 19	Zone 21	Zone 15	Zone 16	Zone 17		Zone 20	Zone 22
Watford	91.5	55.0	6.3	1.4	5.5	0.9	10.7	16.0	5.3	11.5	1.1	2.2	0.0	0.0	0.0	0.0	0.0	4.5	0.0	0.0	51.2	0.0	263.2
Others Watford	0.0	2.8	0.0	1.2	0.0	0.0	0.0	0.6	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	5.7
Sub-total Watford	91.5	57.8	6.3	2.6	5.5	0.9	10.7	16.6	5.3	12.0	1.1	2.8	0.0	0.0	0.0	0.0	0.0	4.5	0.0	0.0	51.2	0.0	269.0
Bushey	6.7	1.4	21.2	1.4	0.8	0.0	0.0	2.5	0.6	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2	0.0	0.0	3.5	0.0	42.1
Radlett	5.3	0.7	2.0	13.0	10.5	1.3	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.0	10.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	43.7
Borehamwood	0.0	0.0	0.4	2.0	26.4	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	3.5	0.0	32.3
Potters Bar	0.0	0.0	0.0	0.4	0.0	40.5	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0	12.9	0.0	0.0	0.0	0.0	0.0	7.0	0.0	61.4
Others Hertsmere	0.0	0.7	0.4	2.5	2.3	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.8
Sub-total Hertsmere	12.0	2.7	24.0	19.4	40.0	42.7	0.0	2.5	0.6	1.4	0.0	0.7	0.0	0.0	10.2	12.9	0.0	3.2	0.0	0.0	13.9	0.0	186.2
Rickmansworth	6.3	0.7	0.0	0.0	0.0	0.0	30.8	1.8	11.7	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	58.4
Others Three Rivers	5.7	8.4	0.8	0.0	1.6	0.0	12.5	4.2	7.5	9.8	1.1	0.9	0.0	0.0	1.8	0.0	0.0	0.0	0.0	0.0	3.5	0.0	57.7
Sub-total Three Rivers	12.0	9.1	0.8	0.0	1.6	0.0	43.3	6.1	19.2	10.3	1.1	0.9	0.0	0.0	1.8	0.0	0.0	6.5	0.0	0.0	3.5	0.0	116.1
Hemel Hempstead	0.0	0.0	0.5	0.0	0.0	0.0	0.6	0.0	1.2	7.3	77.2	32.5	6.4	1.3	12.1	0.0	0.8	0.0	3.2	0.0	0.0	0.0	143.1
Berkhamsted	0.0	0.7	0.0	0.3	0.0	0.0	0.0	0.4	6.5	2.2	8.5	44.3	6.7	0.0	0.0	0.0	0.0	17.3	9.5	0.0	3.8	100.2	
Tring	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.0	3.0	16.8	0.0	0.0	0.0	0.0	9.5	4.8	0.0	0.0	36.2	
Others Dacorum	0.0	0.7	0.0	0.0	0.0	0.0	0.0	1.1	2.2	18.8	2.2	0.5	0.0	1.8	0.0	0.0	3.2	0.8	5.5	0.0	0.0	0.0	36.8
Sub-total Dacorum	0.0	2.1	0.5	0.0	0.0	0.0	0.6	0.0	2.7	16.0	99.5	43.2	54.1	24.8	14.0	0.0	0.8	3.2	30.8	19.8	0.0	3.8	316.3
St Albans	0.0	3.5	0.4	5.7	3.6	3.8	0.5	0.8	0.4	3.8	11.4	1.3	0.5	0.0	141.0	16.4	9.2	0.0	0.8	0.0	7.0	210.2	
Harpden	0.0	0.0	0.0	0.3	0.0	0.6	0.0	0.0	0.0	0.5	0.0	1.3	0.0	0.0	14.0	0.0	57.5	0.0	0.0	2.4	0.0	6.0	82.7
Others St Albans	1.1	0.7	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	2.5	0.7	0.0	0.0	13.3	7.1	3.4	0.0	0.0	0.0	3.5	32.7	
Sub-total St Albans	1.1	4.2	0.4	6.0	3.6	4.5	0.9	0.8	0.4	4.3	13.9	3.3	0.5	0.0	168.3	23.5	70.1	0.0	0.8	2.4	0.0	16.5	325.6
Sub-total Authority Areas	116.6	75.9	32.0	28.2	50.8	48.0	55.5	26.0	28.3	44.0	115.6	50.9	54.6	24.8	194.3	36.4	70.9	17.5	31.6	22.1	68.6	20.3	1,213.1
Central London	5.7	11.2	9.6	2.7	7.9	1.3	5.4	10.6	5.0	2.2	16.4	10.9	2.4	3.2	22.4	6.4	4.7	16.7	4.3	9.4	21.9	4.8	185.1
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	4.2	2.7	0.0	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	45.7	0.0	0.0	12.0	0.0	65.9
Hatch End	0.0	7.7	0.8	0.0	1.6	0.0	0.0	6.6	1.8	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	49.3	0.0	0.0	29.0	0.0	97.2
Pinner	0.0	0.0	0.4	0.0	0.0	0.0	0.5	1.2	1.8	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	52.5
Ruislip	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.6	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	55.0
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	2.6	0.0	0.0	0.0	0.0	39.7	0.0	1.9	44.1
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	0.3	0.0	0.0	0.0	0.0	0.0	0.0	54.0	0.0	0.0	54.3
Northwood	1.1	0.7	0.0	0.0	0.0	0.0	1.7	19.1	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	44.5
Barnet	0.0	0.0	0.0	0.5	3.9	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	54.2
Stanmore	0.0	0.7	2.5	0.0	1.6	0.0	0.0	6.9	0.0	2.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	44.4	0.0	58.2
Aylesbury	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.9	2.1	1.8	0.0	0.0	0.0	12.4	4.7	0.0	0.0	0.0	22.9
Hatfield	0.0	0.0	0.0	1.2	0.8	0.6	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	1.8	14.5	0.8	0.0	0.0	0.0	14.5	0.0	34.9
Mill Hill	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	0.0	0.0	0.0	0.0	0.0	0.0	42.0	0.0	43.6
Uxbridge	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.0	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	24.4
Welwyn Garden City	0.0	0.0	0.0	0.0	0.0	1.9	0.0	0.6	0.0	0.0	0.0	0.0	0.0	2.6	3.6	0.8	0.0	0.0	0.0	0.0	46.2	0.0	55.7
Others Outside Authority Areas	3.9	1.6	4.1	3.7	8.3	4.1	2.2	1.8	8.4	3.4	4.2	18.5	7.6	3.4	3.8	18.1	6.6	64.1	41.0	47.8	59.3	38.1	353.9
Total	131.5	101.3	49.7	36.2	76.4	56.6	65.3	77.8	45.8	53.2	136.2	81.8	66.7	33.5	227.5	79.0	83.8	356.8	89.3	177.8	331.3	125.8	2,483.2

Notes:

a. Table 3 x Table 4

2016 Prices

South West Hertfordshire Retail & Leisure Study
Nexus Planning

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

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

Notes:

a. Table 5-9

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

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

Notes:

a. Table 5-9

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

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

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

Notes:

a. Table 10 - Table 11

2016 Prices

South West Hertfordshire Retail & Leisure Study
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Table 13: Food and Drink Floorspace Capacity (sq m) (Scenario 4)

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

Notes:

a. Table 12

2016 Prices

Appendix H | Leisure Capacity Tables – High Growth Scenario

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.

South West Hertfordshire Retail & Leisure Study

Nexus Planning

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

South West Hertfordshire Retail & Leisure Study

Nexus Planning

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

South West Hertfordshire Retail & Leisure Study
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	0.0	3.4	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	1.1	4.6	1.0	0.0	0.0	0.0	0.0	36.7
Others Outside Authority Areas	3.0	1.6	8.2	10.1	10.8	7.2	3.4	2.3	18.2	6.3	3.1	22.6	11.4	10.2	1.7	23.0	7.9	18.0	45.9	26.9	17.9	30.3
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes:

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

South West Hertfordshire Retail & Leisure Study
Nexus Planning

Table 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	0.0	0.3	4.1	1.3	5.1	26.6	4.0	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	0.0	0.9	0.0	1.8	10.1	0.0	0.0	0.0	0.0	6.8	3.2	0.0	0.0	23.2
Others Dacorum	0.0	0.4	0.0	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	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	0.6	0.0	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	0.6	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	0.0	0.2	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	0.0	1.1	12.0	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	0.0	0.3	0.0	0.0	0.5	1.2	1.1	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	0.0	0.4	0.0	0.0	1.2	9.4	0.5	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	0.0	1.9	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	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	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	
Harpden	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	9.4	3.4	0.0	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

South West Hertfordshire Retail & Leisure Study
Nexus Planning

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
Others Watford	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	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
Others Hertsmere	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
Others Three Rivers	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
Others Dacorum	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
Harpden	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
Others St Albans	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
Others Outside Authority Areas	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

South West Hertfordshire Retail & Leisure Study
Nexus Planning

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	0.0	3.0	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	80.1	
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	0.0	8.7	4.3	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	0.4	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	0.0	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	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	6.4	0.0	174.2	
Harpden	0.0	0.0	0.0	0.2	0.0	0.5	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	0.0	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	3.2	0.0	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	140.1	19.6	58.4	0.0	0.7	2.2	0.0	15.0	0.0	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	11.4	4.2	0.0	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	41.9	0.0	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

South West Hertfordshire Retail & Leisure Study
Nexus Planning

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 Three 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	0.4	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	0.0	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	9.5	4.8	0.0	0.0	0.0	33.5	
Others Dacorum	0.0	0.6	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	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	0.0	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	0.8	0.0	0.0	7.0	0.0	191.3	
Harpden	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	0.0	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	0.0	0.2	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

Appendix I | Planning Policy Commentary

Plan	Extant Town Centre Policies	Recommendation
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**Dacorum Borough
Council**

Local Plan (2004)	<p>POLICY 43 SHOPPING AREAS IN LOCAL CENTRES</p> <p>Each local centre contains a shopping area (see table below).</p> <p>In shopping areas with less than 8 shops, permission will not be granted for a change of use involving the loss of a shop use at street level. In larger shopping areas, the loss of a shop use will not be permitted at street level unless:</p> <p>(a) at least 60% of the total frontage remains in shop use, and an appropriate range of local shops remains;</p> <p>(b) the alternative use is appropriate to the commercial functioning of the area; and</p> <p>(c) non-retail uses are dispersed throughout the area.</p>	<p>The principle of this policy is supported by NPPF paragraph 23 (bullet points 1 and 3) which give local authorities support for pursuing policies to support town centre vitality and viability, and to set policies which make clear which uses will be permitted in designated centres.</p> <p>In practice though, this policy is considered too precise for modern centres, which increasingly accommodate a range of town centre uses which might not be 'shops' (e.g. estate agents or cafes). We would recommend broadening the frontage target to 'town centre uses'. In that context though, the Council may choose to increase the figure above 60%.</p> <p>By relating only to 'street level', the Policy accords with NPPF guidance on recognising the importance of residential development in the vitality of centres (usually on upper floors).</p>
Local Plan (2004)	POLICY 44 SHOPPING DEVELOPMENT OUTSIDE EXISTING CENTRES	Policy 38 has been deleted, and so the cross-referral parts of this policy are outdated.

Plan	Extant Town Centre Policies	Recommendation
	<p>Shopping proposals outside defined centres will be required to demonstrate that a sequential approach to site selection has been followed in accordance with Policy 38 and that there is a need for the development in relation to:</p> <p>(a) the quantitative requirement for additional floorspace; and</p> <p>(b) the qualitative need for the facility.</p> <p>In the case of all major shopping schemes a trade capacity and impact study may be required from an applicant to assist the Council's assessment of the proposal.</p> <p>Shopping development will only be permitted outside existing centres if it meets these tests and it:</p> <p>(i) does not result in an over provision of floorspace likely to damage the main shopping hierarchy in Dacorum or adjoining Districts;</p> <p>(ii) would not seriously affect the vitality or viability of nearby town or local centres;</p> <p>(iii) would not prejudice future investment in existing centres;</p> <p>(iv) provides a necessary extension of the range and diversity of outlets available to shoppers;</p> <p>(v) is easily and safely accessible by a choice of means of transport, including passenger transport, as well as by cyclists, pedestrians and people with disabilities;</p> <p>(vi) would help reduce the need to travel.</p>	<p>The broad wording of the policy is also out-dated as it is prefaced on a requirement to demonstrate 'need'. This wording derives from a previous planning regime. The modern tests are assessment for impact and compliance with the sequential test.</p> <p>The second part of the policy is largely compliant with modern retail policy guidance as it relates to the impact test. We would recommend deleting criteria (i) as it duplicates elements of (ii) below. We would suggest replacing 'seriously affect' with 'result in significant adverse impact' under criteria (ii) in order to match the wording of the NPPF (Paragraph 27). Criteria (iii) should be expanded to relate to the impact on 'existing, committed and planned public and private investment', also in keeping with NPPF (Paragraph 26). Criteria (iv) might better relate to 'meeting local consumer choice' in line with the wording of the NPPF (Paragraph 26).</p>
Local Plan (2004)	POLICY 45 SCATTERED LOCAL SHOPS	This is a local policy which should still carry weight.

Plan	Extant Town Centre Policies	Recommendation
	<p>The loss of individual local shops outside town centres and local centres to alternative uses will not be permitted unless:</p> <p>(a) there is another shop similar in use available for customers within convenient walking distance, or, in the absence of such an alternative, all reasonable attempts to sell or let the premises for shop purposes have failed; and</p> <p>(b) the alternative use complements the function and character of the area.</p> <p>Additional small local shops may be permitted in exceptional circumstances where there is a proven need.</p>	<p>The Council may wish to consider whether balancing the need for residential development is referenced as a potential exception clause in future policy wording.</p> <p>The final sentence should be amended to omit there being requirement to demonstrate a 'need', and instead refer to the requirement to demonstrate that there would be no significant adverse impact.</p>
Local Plan (2004)	<p>POLICY 46 GARDEN CENTRES</p> <p>Each proposal for a garden centre will be assessed according to the:</p> <p>(a) location of the site; (b) size of the site; (c) nature of the use; (d) amount of building; (e) traffic generation; (f) adequacy of the access; (g) parking requirement; and (h) quality of the landscaping.</p> <p>In terms of general location, a garden centre will be acceptable within a settlement where shopping is appropriate. Elsewhere in a settlement or at its edge with the countryside a garden centre may be permitted if; (i) the use is</p>	<p>This is a local policy which can still carry weight.</p>

Plan	Extant Town Centre Policies	Recommendation
	<p>not intrusive; and (ii) it significantly enhances the appearance of the land. In the open countryside of the Green Belt and the Rural Area a garden centre will not be permitted except as a reuse of redundant buildings. No addition to these buildings will be permitted unless the development is very small in scale and has no detrimental effect on the character and the appearance of the countryside. An incremental increase in the amount of building will not be accepted.</p>	
Local Plan (2004)	<p>POLICY 47 AMUSEMENT CENTRES</p> <p>Each proposal for an amusement centre will be assessed in relation to:</p> <ul style="list-style-type: none"> (a) the nature of the use; (b) potential noise and disturbance to residents; (c) appearance; and (d) the location of the premises. <p>Locations outside town centres and local centres will not be accepted, nor will locations within main shopping frontages (see Policy 42).</p>	<p>The policy is partially out-dated as Policy 42 has been deleted. If the Council chooses to preserve a policy on amusement centres, the reference to 'main shopping frontages' should be updated to 'primary frontage' where they exist, or 'primary shopping area' where they do not. We would also suggest that the Council defines precisely what is meant by an amusement centre given the rise of gaming arcades, soft-play centres, trampoline parks etc., alongside more traditional amusement arcades.</p>
Local Plan (2004)	<p>POLICY 48 WINDOW DISPLAYS</p> <p>Planning permission for non-shop uses at street level in shopping areas will normally be subject to a condition requiring the provision and retention of a "shop" window display.</p>	<p>This is a local policy which can still carry weight. We would recommend replacing 'shopping areas' with either 'primary shopping area' or 'town centre boundary', depending on how widely protection is required.</p>

Plan	Extant Town Centre Policies	Recommendation																																
Core Strategy (2013)	<p>POLICY CS16: Shops and Commerce</p> <p>The main retail hierarchy of town centres and local centres (listed in Table 5) will be strengthened by encouraging appropriate new retail development and retaining sufficient existing shops in these centres.</p> <p>New retail development will be assessed in terms of its location, scale and impact. It will be permitted if it accords with the retail hierarchy and conforms to the sequential approach. Most retail development will be directed to the town and local centres.</p> <p>Opportunities will be given to provide capacity for the following amounts of floorspace if there is demand:</p> <table border="1" data-bbox="622 818 1352 997"> <thead> <tr> <th rowspan="2">Town Centre</th> <th colspan="3">Square Metres (net)</th> <th rowspan="2"></th> </tr> <tr> <th>Comparison</th> <th>Convenience</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>Hemel Hempstead</td> <td>15,500</td> <td></td> <td></td> <td>2009-2021</td> </tr> <tr> <td></td> <td>32,000</td> <td></td> <td></td> <td>2022-2031</td> </tr> <tr> <td></td> <td>47,500</td> <td>6,000</td> <td>53,500</td> <td>Total</td> </tr> <tr> <td>Berkhamsted</td> <td>6,000</td> <td>1,000</td> <td>7,000</td> <td rowspan="2">Total</td> </tr> <tr> <td>Tring</td> <td>2,500</td> <td>750</td> <td>3,250</td> </tr> </tbody> </table> <p>New retail floorspace will only be permitted outside of defined centres if the proposal complies with the sequential approach and demonstrates a positive overall outcome in terms of the impact assessment.</p> <p>Hemel Hempstead will be the main destination for comparison goods shopping, leisure, entertainment and civic and cultural activities. Other centres will provide core shopping facilities and services for their local communities.</p> <p>Development proposals that promote a diverse evening economy in the town</p>	Town Centre	Square Metres (net)				Comparison	Convenience	Total	Hemel Hempstead	15,500			2009-2021		32,000			2022-2031		47,500	6,000	53,500	Total	Berkhamsted	6,000	1,000	7,000	Total	Tring	2,500	750	3,250	<p>References to the retail hierarchy and capacity figures will need updating in line with the recommendations of our report.</p> <p>The phrase "...and demonstrates a positive overall outcome in terms of the impact assessment" implies that new retail development outside defined town centre would only be permissible if there was a positive impact. Whilst aspirational, this sets the bar too high in terms of NPPF guidance which instead requires that there is no 'significant adverse impact' on the range of factors set out in its Paragraph 26. The policy should be re-worded accordingly.</p>
Town Centre	Square Metres (net)																																	
	Comparison	Convenience	Total																															
Hemel Hempstead	15,500			2009-2021																														
	32,000			2022-2031																														
	47,500	6,000	53,500	Total																														
Berkhamsted	6,000	1,000	7,000	Total																														
Tring	2,500	750	3,250																															

Plan	Extant Town Centre Policies	Recommendation
	centres will be supported provided that their social and environmental impacts are controlled.	
Site Allocations (2017)	<p>POLICY SA7: Shopping Areas in Town Centres</p> <p>Each town centre contains a key shopping area which comprises:</p> <ul style="list-style-type: none"> (a) Primary frontage; and (b) Secondary frontage as shown on the Policies Map. <p>Within the key shopping area, all new development should provide an active frontage at ground floor level, contribute to the vibrancy of the centre and promote the objectives of the relevant Place Strategy.</p> <p>In Hemel Hempstead town centre, development should comply with Policy CS33 and support the strategy for each character zone set out in the Town Centre Master Plan.</p> <p>Within primary frontages, the following uses will be permitted at ground floor level:</p> <ul style="list-style-type: none"> (a) A1 (shops); (b) A3 (restaurants and cafes); and (c) D2 (assembly and leisure). <p>Within secondary frontages, the following uses will be permitted at ground floor level:</p>	<p>Reference to a 'key shopping area' should be updated to 'primary shopping area' to conform to NPPF guidance.</p>

Plan	Extant Town Centre Policies	Recommendation
	(a) A1 (shops); (b) A2 (financial and professional services); (c) A3 (restaurants and cafes); (d) A4 (drinking establishments); (e) A5 (hot food takeaways); (f) D1 (non-residential institutions); and (g) D2 (assembly and leisure).	

Hertsmere Borough

Core Strategy (2013)	<p>Policy CS27 Town centre strategy</p> <p>Development within the designated town, district or neighbourhood centres of Borehamwood, Potters Bar, Bushey and Radlett will be permitted provided that it maintains their primary retail function and wider role as a focus for business, leisure, cultural and other appropriate town centre uses (as defined within the NPPF). Retail activity elsewhere should be focused within local centres and parades, which will be expected to retain a core of local shopping facilities and accommodate any new retail development, commensurate to their position within the town, district and neighbourhood centre hierarchy. Proposals for main town centre uses will be considered in accordance with national planning policy set out in the NPPF, including the application of the sequential test and impact assessment as appropriate.</p>	Complies with the NPPF. No suggested changes.
Core Strategy (2013)	<p>Policy CS28 Strengthening town centres</p> <p>The retail function and vitality of designated centres will be reinforced through the designation of primary and secondary shopping frontages in</p>	If our boundary recommendations in Appendix F are accepted, then this policy will need updating to reflect the range of centres considered, as well as the primary and secondary frontages applied to

Plan	Extant Town Centre Policies	Recommendation
	<p>Borehamwood and Potters Bar. There will be a focus on (A1) retail uses within the primary frontages and scope for a wider range of activities in secondary frontages, with an emphasis on a mix of (A1) retail, (A2) financial and professional services and (A3) dining-in establishments. An appropriate proportion of other uses will also be permitted in secondary frontages, including (A4) pubs and bars and (A5) take away uses, together with other appropriate arts, leisure and entertainment uses. Around the periphery of both secondary frontages and local parades, the Council will identify where any opportunities exist for residential accommodation to replace long-term vacant commercial units.</p> <p>Details of frontages and uses will be set out in the Site Allocations and Development Management DPD along with any planned measures for the Council to use compulsory purchase and other powers to address the long term neglect and abandonment of vacant commercial and other property within town centres.</p> <p>Proposals for rural diversification will be supported where they do not conflict with other policies although to protect the role of town centres, further retail development at Battlers Green Farm or further afield at the Willows Farm, will not be sought.</p>	<p>specific centres. We note that Hertsmere will be considering this matter further during the evolution of their Local Plan.</p>
Core Strategy (2013)	<p>Policy CS29 Retail and commercial development in Shenley</p> <p>Small scale retail and commercial development in Shenley should be restricted to suitable sites within existing commercial areas. Locations will be identified in the Site Allocations and Development Management DPD, based on those defined in the Shenley Parish Plan:</p>	<p>This is a local policy which remains compliant.</p>

Plan	Extant Town Centre Policies	Recommendation
	<p>i) along London Road in the south east of the village; and ii) at Andrew Close and the nearby junction between London Road and Porters Park Drive (excluding the reserve school site).</p> <p>Retail and commercial development in identified locations in Shenley should be of a size and scale which primarily serves the local community rather than drawing in large numbers of visitors from further afield.</p>	
Core Strategy (2013)	<p>Policy CS30 Safe and attractive evening economy</p> <p>The Council wishes to promote a range of uses in town centres that cater for the whole community, creating a balanced evening economy including entertainment and late night retailing as well as the provision of a range of eating and drinking establishments. The quantity, type and location of A3, A4, A5 and other evening or late night uses will be controlled, having regard to other Local Plan and Development Plan Document policies, together with the aims and objectives of the Hertsmere Crime and Disorder Reduction Partnership Plan, including the need to reduce anti-social behaviour, crime and the fear of crime.</p> <p>Where new A3, A4 and A5 uses are permitted, financial contributions will be sought for related town centre improvements including additional CCTV, improved lighting and improved signage for CCTV and Alcohol Free Zones. In relation to those areas where concentrations of drinking establishments, night clubs or other evening or late night uses have caused existing anti-social problems, there will be a presumption against further consents for such uses.</p>	Complies with the NPPF. No suggested changes.

Plan	Extant Town Centre Policies	Recommendation												
<p>Site Allocations and Development Management Policies Plan (2016)</p>	<p>Policy SADM42 - Town and District Centres</p> <p>The boundaries of town and district centres are shown on the Policies Map i.e:</p> <ul style="list-style-type: none"> • Borehamwood Town Centre • Potters Bar Darkes Lane Local Town Centre • Potters Bar High Street District Centre • Radlett Watling Street District Centre • Bushey High Street District Centre • Bushey Heath High Road District Centre <p>The Council will support proposals to improve the facilities, functions and environment of these centres whenever appropriate. Specific proposals are identified on the Policies Map as follows:</p> <table border="1" data-bbox="638 903 1442 1342"> <thead> <tr> <th>Ref.</th> <th>Address</th> <th>Proposal</th> <th>Planning requirements</th> </tr> </thead> <tbody> <tr> <td>TC1</td> <td>29-59 Shenley Road and 61-71 Shenley Road, Borehamwood</td> <td>Mix of town centre uses</td> <td>Active frontages on ground floor fronting Shenley Road, consistent with the range of uses sought in secondary frontages in Policy CS28 and Policy SADM44. Upper floor(s) may be residential and/or office. Design should respect the existing pattern of development along Shenley Road. A general building height of 3 storeys is appropriate. New retail and commercial units should be serviced from the rear. Car parking should also be provided at the rear.</td> </tr> <tr> <td>TC2</td> <td>Radlett Service Station/Regency House, Former Fire Station and Burrell & Co</td> <td>Mix of town centre uses</td> <td>Retail/commercial uses on ground floor fronting Watling Street. Community uses required on part of the site to replace former community use, subject to the provisions of Core Strategy Policy CS19 Key Community Facilities. Upper floor(s) may be residential and/or office. Comprehensive redevelopment is preferred, though the site could come forward in stages. Building should not exceed two storeys fronting Watling Street, though it may be possible to utilise roof voids and/or basement space. Design should respect the character and enhance the setting of the adjacent Conservation Area. Consistent and co-ordinated design required across the whole site. Flood risk assessment required. Noise mitigation measures required for residential (and any other noise sensitive) use.</td> </tr> </tbody> </table>	Ref.	Address	Proposal	Planning requirements	TC1	29-59 Shenley Road and 61-71 Shenley Road, Borehamwood	Mix of town centre uses	Active frontages on ground floor fronting Shenley Road, consistent with the range of uses sought in secondary frontages in Policy CS28 and Policy SADM44. Upper floor(s) may be residential and/or office. Design should respect the existing pattern of development along Shenley Road. A general building height of 3 storeys is appropriate. New retail and commercial units should be serviced from the rear. Car parking should also be provided at the rear.	TC2	Radlett Service Station/Regency House, Former Fire Station and Burrell & Co	Mix of town centre uses	Retail/commercial uses on ground floor fronting Watling Street. Community uses required on part of the site to replace former community use, subject to the provisions of Core Strategy Policy CS19 Key Community Facilities. Upper floor(s) may be residential and/or office. Comprehensive redevelopment is preferred, though the site could come forward in stages. Building should not exceed two storeys fronting Watling Street, though it may be possible to utilise roof voids and/or basement space. Design should respect the character and enhance the setting of the adjacent Conservation Area. Consistent and co-ordinated design required across the whole site. Flood risk assessment required. Noise mitigation measures required for residential (and any other noise sensitive) use.	<p>The retail hierarchy will need amending in line with the recommendations of our report in Section 9.</p> <p>We consider that the local impact thresholds are appropriate given the health-check work we have undertaken.</p>
Ref.	Address	Proposal	Planning requirements											
TC1	29-59 Shenley Road and 61-71 Shenley Road, Borehamwood	Mix of town centre uses	Active frontages on ground floor fronting Shenley Road, consistent with the range of uses sought in secondary frontages in Policy CS28 and Policy SADM44. Upper floor(s) may be residential and/or office. Design should respect the existing pattern of development along Shenley Road. A general building height of 3 storeys is appropriate. New retail and commercial units should be serviced from the rear. Car parking should also be provided at the rear.											
TC2	Radlett Service Station/Regency House, Former Fire Station and Burrell & Co	Mix of town centre uses	Retail/commercial uses on ground floor fronting Watling Street. Community uses required on part of the site to replace former community use, subject to the provisions of Core Strategy Policy CS19 Key Community Facilities. Upper floor(s) may be residential and/or office. Comprehensive redevelopment is preferred, though the site could come forward in stages. Building should not exceed two storeys fronting Watling Street, though it may be possible to utilise roof voids and/or basement space. Design should respect the character and enhance the setting of the adjacent Conservation Area. Consistent and co-ordinated design required across the whole site. Flood risk assessment required. Noise mitigation measures required for residential (and any other noise sensitive) use.											

Plan	Extant Town Centre Policies	Recommendation
	<p>New development must also accord with Policy CS27 in the Core Strategy, including the need for impact assessments. In particular the Council will require the submission of an impact assessment for retail, office and leisure proposals in excess of:</p> <ul style="list-style-type: none"> a) 2,500 square metres on the edge of Borehamwood Town Centre; b) 1,000 square metres elsewhere in Borehamwood; and c) 500 square metres on the edge of a Local Town Centre, or District Centre or anywhere else in the Borough. 	
<p>Site Allocations and Development Management Policies Plan (2016)</p>	<p>Policy SADM43 - Primary Frontages</p> <p>In the primary shopping frontages (defined on the Policies Map) the Council will seek to ensure that class A1 (retail shops) predominate in ground floor units. A development proposal which reduces the combined proportion of class A1 and A2 retail uses at ground floor level below 70% within that centre's primary frontage will not be permitted.</p> <p>Changes of use which will result in any loss of class A1 (retail shops), or A2 (financial and professional services) uses will only be permitted where it can be demonstrated that:</p> <ul style="list-style-type: none"> (i) the development proposal supports the overall retail function of the primary frontage and, in the case of class A3 uses within key shopping areas, does not lead to an over-concentration of such units within the primary frontage; and (ii) the site has been effectively marketed for class A1 and/or A2 uses. 	<p>We provide justification for considering omitting primary and secondary frontages from a number of smaller centres in our introduction to Appendix F. If our recommendation was adopted, then the Council could replace 'primary shopping frontages' with 'primary shopping area', and adapt this policy accordingly.</p> <p>Our survey work found that there was a limited evening economy in Borehamwood in particular., The Council should consider, therefore, whether maintaining a 5% restriction on A4 and A5 establishments on the primary frontage is suitable. The policy is absolute at the moment, and it may be helpful to add a marketing clause for long-term vacant units, or wording around exceptional circumstances to provide for any site specific cases</p>

Plan	Extant Town Centre Policies	Recommendation
	<p>Proposals for class A4 (drinking establishments) and A5 (hot food takeaways) uses will not be permitted if the combined proportion of these two types of uses exceeds 5% within primary frontages in Borehamwood, Radlett and Potters Bar; or exceeds 10% within primary frontages in Bushey Village and Bushey Heath.</p> <p>Development proposals for betting shops and pay-day loan shops will not be permitted if they result in an over-concentration of these uses within any primary frontage. Development proposals for uses with a non-active frontage at ground floor level will also not be permitted in primary frontages.</p>	to be made.
Site Allocations and Development Management Policies Plan (2016)	<p>Policy SADM44 - Secondary Frontages</p> <p>In the secondary shopping frontages (defined on the Policies Map) the Council will seek to maintain and encourage class A1 (retail shops), A2 (financial and professional services) and A3 (restaurants and cafes) uses in ground floor units.</p> <p>Changes of use which result in any loss of class A1 (retail shops), A2 (financial and professional services), or A3 (restaurants and cafes) uses will only be permitted where it can be demonstrated that the development proposal does not undermine the overall retail character of the secondary frontage.</p> <p>Proposals for other main town centre uses, including A4 (drinking establishments), A5 (hot food takeaway) and D2 (assembly and leisure) will be permitted where they would not harm the vitality or viability of the frontage and the centre generally, and would not lead to an over-concentration of such uses. New uses will be expected to maintain an active frontage at street level.</p>	Complies with the NPPF. No suggested changes.

Plan	Extant Town Centre Policies	Recommendation
	<p>Development proposals will not be permitted if they will result in an over-concentration of betting shops and pay-day loan shops within any secondary frontage.</p>	
<p>Site Allocations and Development Management Policies Plan (2016)</p>	<p>Policy SADM45 - Smaller Centres, Parades and Individual Shops</p> <p>The Council will, as far as possible, protect class A1 shops within the following designated areas: Local Centres, Key Neighbourhood Parades, Neighbourhood Centres, Neighbourhood Parades, and Individual Shops.</p> <p>Where consent is required, however, proposals that would result in the loss of a shop will be permitted provided:</p> <ul style="list-style-type: none"> (i) in the case of a Neighbourhood Centre, local residents would still have access to a range and choice of essential shops within reasonable walking distance; (ii) in the case of a Neighbourhood Parade, there is more than one class A1 use remaining unless there is clear evidence to demonstrate that there is no demand for the continued class A1 use and the unit has been marketed effectively for such use; (iii) in the case of Individual Shops, there is clear evidence to demonstrate that there is no demand for the continued class A1 use and the unit has been marketed effectively for such use. 	<p>Complies with the NPPF. No suggested changes.</p>

Plan	Extant Town Centre Policies	Recommendation
<p>Site Allocations and Development Management Policies Plan (2016)</p>	<p>Policy SADM46 - Controlling Non-Retail Uses</p> <p>Applications for non-A1 retail uses within the Borough's key shopping areas (defined in Table 3 Shopping Hierarchy) will be permitted where it can be demonstrated that:</p> <ul style="list-style-type: none"> (i) the nature of the use would not have a significant detrimental impact on the functioning of the centre, parade or frontage and the local area generally; (ii) the concentration or clustering of such uses would not have a significant detrimental impact on the functioning of the centre, parade or frontage and the local area generally; (iii) the proposal would not result in unacceptable levels of noise, odours, traffic, parking demand, general disturbance or disorder and nuisance; and (iv) the proposal would not have an unacceptable negative impact on the retail image of the area in which it is located. <p>Outside of key shopping areas, applications for non-A1 retail uses will be permitted provided that the proposal would not result in unacceptable levels of noise, odour, traffic, parking demand, general disturbance, or disorder and nuisance.</p> <p>Where the proposal is for a hot food takeaway (use class A5), and the premises would be clearly visible from any entrance or access point to a secondary school, it must be demonstrated that the proposed use would not undermine any existing or proposed healthy eating policy at that school.</p>	<p>Complies with the NPPF. No suggested changes.</p>

Plan	Extant Town Centre Policies	Recommendation
<p>Site Allocations and Development Management Policies Plan (2016)</p>	<p>Policy SADM47 - Night-time and Evening Uses</p> <p>Applications for evening economy uses, including entertainment, late night retailing and eating and drinking establishments will be permitted where:</p> <ul style="list-style-type: none"> (i) the proposal supports the creation of a balanced evening economy; (ii) the likely effects of the proposal, whether individually or cumulatively, would not result in unacceptable impacts in terms of noise, traffic, parking, signage and lighting, general disturbance or problems of disorder and nuisance; (iii) the design of the development is acceptable, as it relates to public safety, crime prevention and the reduction of anti-social behaviour; (iv) arrangements are agreed for mitigating pollution, including noise, odours and emissions; (v) the proposal incorporates access arrangements for people of all ages and abilities; (vi) adequate levels of parking and public transport would be available during the hours of operation; and (vii) the day-time use would not detract from the character and amenity of the surrounding shops and services (i.e. by providing a blank frontage due to closure during the day rather than maintaining an active street frontage). 	<p>Complies with the NPPF. No suggested changes.</p>

Plan	Extant Town Centre Policies	Recommendation
<p>Site Allocations and Development Management Policies Plan (2016)</p>	<p>Policy SADM48 - Opportunities for Residential Use</p> <p>The change of use to residential accommodation of ground floor premises will be permitted if:</p> <ul style="list-style-type: none"> (i) the unit is long term vacant; (ii) there is clear evidence to demonstrate that there is no demand for continued retail or commercial use; (iii) the unit has been marketed effectively for such use; (iv) the site is either outside any designated Key Shopping Area (ref. Table 3: Shopping Hierarchy) or at the outer periphery of a designated Secondary Frontage and would not create or perpetuate a break in the active frontage; (v) local residents would still have access to a range and choice of essential shops and services within the centre or parade, or within reasonable walking distance; (vi) in the case of neighbourhood centres and parades and individual shops it is not the last remaining A1 use; (vii) the use of the unit for residential purposes is consistent with the function and character of the area; (viii) the design of the new frontage is of a high standard which both meets the needs of future occupiers and is sensitive to the appearance of nearby shop 	<p>Key Shopping Areas were introduced by the Council in order to bring some Permitted Development applications within planning control. Table 3 in SADM identifies Key Shopping Areas and Paragraph 7.12 explains their importance. We have reviewed these and would endorse the approach adopted.</p>

Plan	Extant Town Centre Policies	Recommendation
	<p>fronts; and</p> <p>(ix) high quality self-contained residential accommodation with a high standard of amenity for occupiers would be provided, consistent with other policies and standards relating to housing and design.</p>	
<p>Site Allocations and Development Management Policies Plan (2016)</p>	<p>Policy SADM49 - Shop Fronts</p> <p>Permission will be granted for well-designed shop fronts which respect the street scene and follow the guidance set out in the Planning and Design Guide SPD.</p>	<p>Complies with the NPPF.</p> <p>Our work has highlighted instances of poor shop frontages in Potters Bar, Radlett, Bushey and Bushey Heath. Cross-reference to the SPD is therefore welcome.</p>

Three Rivers District

<p>Core Strategy (2011)</p>	<p>CP7 Town Centres and Shopping</p> <p>Where there is an identified need for new town centre development, Town and District centres will be the focus for this development. Retail development will specifically be directed to within the Primary Frontages of these centres.</p> <p>Proposals for new town centre and shopping development will be considered taking into account:</p> <p>a) The location of the proposed development with preference given to centrally located and accessible areas, served by a range of transport modes including public transport</p> <p>b) The impact of development on the viability and vitality of existing centres</p>	<p>This policy is out-dated in a number of aspects:</p> <p>The first line explains that there should be an identified 'need' for town centre development. Demonstrating a need is not necessary under NPPF 'town centres first' approach.</p>
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Plan	Extant Town Centre Policies	Recommendation
	<p>and local shops</p> <p>c) The appropriateness of the type and scale of development in relation to the centre and its role, function, character and catchment area.</p> <p>The hierarchy of retail centres and their established character and diversity will be maintained through:</p> <p>d) Protecting and enhancing the vitality and viability of the retail cores of the town and district centres by generally resisting the loss of Class A1 retail uses particularly within their Primary Frontages</p> <p>e) Promoting uses which are complementary to the Primary Frontages, normally within adjoining Secondary Frontages</p> <p>f) Taking account of the contribution of non-retail uses to the vitality and viability of centres, having regard to market conditions and impacts on local amenity</p> <p>g) Protecting and enhancing existing Local Centres and other local shops which cater for local day-to-day needs</p> <p>h) Resisting any future out-of-town retailing that would adversely affect existing centres.</p> <p>Projected increases in expenditure and population will be accommodated and should be spread between all centres so that each becomes increasingly self-sufficient in the provision for day-to-day needs, so reducing the need to travel.</p>	<p>The phrase 'new town centre and shopping development' would ideally be replaced with 'main town centre uses' in order to comply with NPPF phraseology.</p> <p>Criterion h) should be updated to explain that out-of-centre development would only be permitted whereby the sequential test was passed, and it was demonstrated that there was no significant adverse impact on designated centres.</p> <p>The floorspace capacity forecasts will be updated in line with the recommendations of our report.</p> <p>We consider that criterion k) is likely to be too prohibitive. The Council should determine any application on its own merits, and within the framework set down in NPPF Paragraphs 26-27.</p>

Plan	Extant Town Centre Policies	Recommendation
	<p>This means providing additional comparison (non-food) floorspace, equating to a net gain of around 2,000 square metres by 2021. The target provision over forthcoming five-year periods will be broadly as follows:</p> <p>i) 1050 square metres by 2016 j) 950 square metres between 2016- 2021.</p> <p>These targets will be reviewed regularly and amended in light of new evidence in relation to forecast expenditure and population. Proposals that would result in provision over and above these targets will be considered on their merits taking into account their appropriateness in scale and function to the relevant centre.</p> <p>With regard to convenience (food) shopping:</p> <p>k) Proposals for any major convenience (food) floorspace (over 1,000 sq metres) over the Plan period will generally be resisted</p> <p>l) Smaller scale local convenience stores coming forward will be considered on their merits taking into account the criteria listed above.</p>	
<p>Site Allocations Local Development Document (2014)</p>	<p>POLICY SA4: RETAIL ALLOCATIONS</p> <p>Retail development will be acceptable in principle within the identified shopping hierarchy of centres:</p> <ul style="list-style-type: none"> • The Town Centre at Rickmansworth • The District Centres at South Oxhey, Abbots Langley and Chorleywood 	<p>The policy is broadly NPPF compliant. However, reference to there being a requirement to demonstrate 'need' should be omitted from the out-of-centre component. Instead, this should be replaced by a requirement to conform to the sequential and impact tests.</p>

Plan	Extant Town Centre Policies	Recommendation
	<ul style="list-style-type: none"> • The Local Centres at Croxley Green (Watford Road and New Road) and Mill End (Moneyhill Parade) • The Local Shops (local shopping parades, groups and individual shops across settlements within the District). <p>Shop fronts and displays should be appropriate to the character and function of the area.</p> <p>Within identified Primary Frontages, the loss of class A1 retail uses will generally be resisted.</p> <p>Within the identified Secondary Frontages, the retention of retail will be encouraged. Uses complementary to the Primary Frontages will be encouraged.</p> <p>Identified Local Centres and Local Shops will be protected and enhanced where they are catering for local day-to-day needs. The retention of retail uses will be encouraged. Uses complementary to the Local Centre and Local Shops will be encouraged.</p> <p>Applications for new retail development outside the identified centres will only be considered if the applicant has established that there is a need for the development and that there is no suitable and viable site likely to become available within or on the edge of the existing centres that could satisfactorily accommodate the development.</p> <p>In all locations proposals for new retail development, involving gains and/or losses, will be considered taking into account its accessibility, its impact on existing centres and appropriateness of the type and scale of development. New shopping facilities will be encouraged where they are supported by up to</p>	

Plan	Extant Town Centre Policies	Recommendation				
	<p>date evidence of need, where they contribute to the vitality and viability and general economic well-being of the area and where they do not impact detrimentally on existing centres.</p>					
St Albans District						
<p>Local Plan (1994)</p>	<div style="border: 1px solid black; padding: 10px;"> <p style="text-align: center;">POLICY 51 SHOPPING AND SERVICE USES, OVERALL STRATEGY</p> <p>The Council's overall strategy towards shopping and service uses is based on the following points:</p> <p>(i) Existing Centres. The Council will seek to maintain and enhance the vitality and viability of existing centres. Limited additional shopping development may be permitted where consistent with Policies 52-55. This includes the possibility of a department store in St. Albans City Centre (see Policy 52). The scale and nature of shopping proposals shall not detract from the character of conservation areas and will reflect the following hierarchy:</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; vertical-align: top;"> <p>a) Minor Sub-Regional Centre St. Albans City Centre</p> </td> <td style="width: 50%; vertical-align: top;"> <p>b) Minor District Centre Harpenden Town Centre</p> </td> </tr> <tr> <td style="vertical-align: top;"> <p>c) Neighbourhood Centres NC.1 Southdown (Harpenden) NC.2 Redbourn NC.3 Wheathampstead NC.4 Verulam Estate (St. Albans) NC.5 Fleetville (St. Albans) NC.6 The Quadrant, Marshalswick (St. Albans) NC.7 London Colney</p> </td> <td style="vertical-align: top;"> <p>d) Local shopping facilities (including local centres and village shops) see Policy 55;</p> </td> </tr> </table> <p>Continued on page 90</p> </div>	<p>a) Minor Sub-Regional Centre St. Albans City Centre</p>	<p>b) Minor District Centre Harpenden Town Centre</p>	<p>c) Neighbourhood Centres NC.1 Southdown (Harpenden) NC.2 Redbourn NC.3 Wheathampstead NC.4 Verulam Estate (St. Albans) NC.5 Fleetville (St. Albans) NC.6 The Quadrant, Marshalswick (St. Albans) NC.7 London Colney</p>	<p>d) Local shopping facilities (including local centres and village shops) see Policy 55;</p>	<p>Given the age of the policy, we assume that a new policy will be constructed in the emerging Local Plan. The hierarchy approach remains valid. Reference to a desire to attract a new department store is likely to have passed with time, though could remain an objective.</p>
<p>a) Minor Sub-Regional Centre St. Albans City Centre</p>	<p>b) Minor District Centre Harpenden Town Centre</p>					
<p>c) Neighbourhood Centres NC.1 Southdown (Harpenden) NC.2 Redbourn NC.3 Wheathampstead NC.4 Verulam Estate (St. Albans) NC.5 Fleetville (St. Albans) NC.6 The Quadrant, Marshalswick (St. Albans) NC.7 London Colney</p>	<p>d) Local shopping facilities (including local centres and village shops) see Policy 55;</p>					

Plan	Extant Town Centre Policies	Recommendation
	<div data-bbox="640 323 1041 738" style="border: 1px solid black; padding: 10px;"> <p style="text-align: center;">POLICY 51 (Cont.)</p> <p>(ii) <u>Service uses</u> will be permitted in existing centres as long as proposals do not detract from the shopping role of these centres (<i>see Policy 57</i>);</p> <p>(iii) <u>Major retail development outside existing town centres.</u> Policy 58 proposes retail warehousing on the gas works site and a supermarket in Hatfield Road, St. Albans and states that out-of-town shopping may be permitted at Barnet Road, London Colney. Any other schemes will be permitted only if the criteria in Policy 58 are complied with.</p> </div>	

Plan	Extant Town Centre Policies	Recommendation																																																															
Local Plan (1994)	<p style="text-align: center;">POLICY 52 SHOPPING DEVELOPMENT IN ST. ALBANS CITY CENTRE</p> <p>Within the St. Albans City Centre Inset Map area, shopping proposals will be assessed against Policy 46 (car parking) and the following points:</p> <p>(i) Major new shopping development (over 1,500 sq. metres gross) will generally be refused apart from the proposed retail warehousing at the gas works site (see Policy 58). However, an exception to this policy may be made if the proposed redevelopment would result in significant improvement to the quality of shopping in the City Centre, including a department store on an environmentally suitable site. Land at the Civic Centre may become available for such redevelopment (see Policy 116, site 2E);</p> <p>(ii) Small scale retail development (under 1,500 sq. metres)</p> <p>a) Proposed sites. Small scale retail development (or service uses where consistent with Policy 57) will generally be permitted on the sites listed below and shown on the Inset Map:</p> <table border="1" data-bbox="689 619 1317 917"> <thead> <tr> <th>REF.</th> <th>LOCATION</th> <th>DETAILED GUIDANCE</th> </tr> </thead> <tbody> <tr> <td>S.1</td> <td>10-28 Catherine Street</td> <td>Policy 115, site 1B</td> </tr> <tr> <td>S.2</td> <td>Drovers Way (rear of 61-77 St. Peters St)</td> <td>Policy 116, site 2A</td> </tr> <tr> <td>S.3</td> <td>Drovers Way (rear of 25-47 St. Peters St)</td> <td>Policy 116, site 2B</td> </tr> <tr> <td>S.4</td> <td>15 Victoria Street (former Queensway)</td> <td>Policy 116, site 2D</td> </tr> <tr> <td>S.5</td> <td>1B-3B London Road</td> <td>Policy 118, site 4A</td> </tr> <tr> <td>S.6</td> <td>Coupers, 21/23 London Road</td> <td>Policy 118, site 4B</td> </tr> <tr> <td>S.7</td> <td>Godfrey Davis, 29 London Road</td> <td>Policy 118, site 4C</td> </tr> <tr> <td>S.8</td> <td>61-63 Lattimore Road & 80, 80A Victoria St</td> <td>Policy 120, site 6A</td> </tr> <tr> <td>S.9</td> <td>1-3 Victoria Parade, Victoria Street</td> <td>Policy 120, site 6B</td> </tr> <tr> <td>S.10</td> <td>100 & 118 London Road (frontage of Marlboro Motors)</td> <td>Policy 121, site 7A</td> </tr> <tr> <td>S.11</td> <td>113-117 London Road & 1-6 Francis Court</td> <td>Policy 121, site 7D</td> </tr> <tr> <td>S.12</td> <td>Drovers Way (rear of 61-67 St. Peters Street)</td> <td>Policy 116, site 2F</td> </tr> </tbody> </table> <p>b) Within defined frontages, Small scale retail development will generally be permitted within the frontages listed below and shown on the Inset Map:</p> <p>Primary Shopping Frontages</p> <table border="1" data-bbox="689 986 1019 1284"> <tbody> <tr> <td>PSF 1</td> <td>3-37 Chequer Street</td> </tr> <tr> <td>PSF 2</td> <td>2A-38 Chequer Street</td> </tr> <tr> <td>PSF 3</td> <td>Christopher Place (inner courtyard only)</td> </tr> <tr> <td>PSF 4</td> <td>3-21 French Row</td> </tr> <tr> <td>PSF 5</td> <td>1-13 George Street</td> </tr> <tr> <td>PSF 6</td> <td>18-28 George Street</td> </tr> <tr> <td>PSF 7</td> <td>The Maltings</td> </tr> <tr> <td>PSF 8</td> <td>1-37 Market Place</td> </tr> <tr> <td>PSF 9</td> <td>6-38 Market Place</td> </tr> <tr> <td>PSF 10</td> <td>1-57 St. Peters Street</td> </tr> <tr> <td>PSF 11</td> <td>2-20 High Street</td> </tr> <tr> <td>PSF 12</td> <td>3-33 High Street</td> </tr> </tbody> </table> <p>Continued on page 92</p>	REF.	LOCATION	DETAILED GUIDANCE	S.1	10-28 Catherine Street	Policy 115, site 1B	S.2	Drovers Way (rear of 61-77 St. Peters St)	Policy 116, site 2A	S.3	Drovers Way (rear of 25-47 St. Peters St)	Policy 116, site 2B	S.4	15 Victoria Street (former Queensway)	Policy 116, site 2D	S.5	1B-3B London Road	Policy 118, site 4A	S.6	Coupers, 21/23 London Road	Policy 118, site 4B	S.7	Godfrey Davis, 29 London Road	Policy 118, site 4C	S.8	61-63 Lattimore Road & 80, 80A Victoria St	Policy 120, site 6A	S.9	1-3 Victoria Parade, Victoria Street	Policy 120, site 6B	S.10	100 & 118 London Road (frontage of Marlboro Motors)	Policy 121, site 7A	S.11	113-117 London Road & 1-6 Francis Court	Policy 121, site 7D	S.12	Drovers Way (rear of 61-67 St. Peters Street)	Policy 116, site 2F	PSF 1	3-37 Chequer Street	PSF 2	2A-38 Chequer Street	PSF 3	Christopher Place (inner courtyard only)	PSF 4	3-21 French Row	PSF 5	1-13 George Street	PSF 6	18-28 George Street	PSF 7	The Maltings	PSF 8	1-37 Market Place	PSF 9	6-38 Market Place	PSF 10	1-57 St. Peters Street	PSF 11	2-20 High Street	PSF 12	3-33 High Street	<p>Re-constructed policy in the new Local Plan should refer to the terminology of the NPPF, particularly with regard to Paragraphs 26 and 27. Reference should be made to a town centred first approach, with development outside town centres only being acceptable where it can be demonstrated that the sequential test is passed and that there exist no significant adverse impacts.</p> <p>The Council could consider introducing distinct town centre policies for St Albans and Harpenden. Each has its own specific character and challenges, summarised in our health-checks and at Section 9 of the main report.</p>
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Plan	Extant Town Centre Policies	Recommendation
Watford Borough		
Core Strategy (2013)	<p>Policy TLC 1 Retail and Commercial Leisure Development</p> <p>Watford town centre will remain the main focus for; comparison goods shopping within the primary shopping area, leisure, entertainment, civic and cultural activities. Development proposals within the town centre which have the principle of “family friendliness” at their heart will be encouraged.</p> <p>Whilst it is expected that most of the additional floor space identified in Table 3 will be delivered on sites within the primary shopping area it is accepted that some of the floor space will be delivered at other SPAs such as at Watford Junction SPA, the Lower High Street SPA, Western Gateway SPA and the Health Campus SPA, subject to the proposals being of an appropriate scale of development and to there being no significant adverse impact on the vitality and viability of the town centre or planned investment at Charter Place.</p> <p>The retail capacity forecast figures set out in Table 3 provide broad guidance only and will be updated from time to time, subject to the provisions of national policy in terms of the sequential test and impact assessment.</p> <p>New leisure and cultural facilities will be acceptable in principle within the town centre. Facilities may also be acceptable at identified edge of centre locations and the Watford Junction SPA subject to there being no significant adverse impact on the vitality and viability of the town centre or planned investment at Charter Place.</p> <p>To maintain and enhance existing social and cultural venues in the town centre that provide all formal and informal cultural and leisure activities: the loss of an</p>	Complies with the NPPF. No suggested changes.

Plan	Extant Town Centre Policies	Recommendation
	<p>existing facility will be resisted unless it can be demonstrated that the facility is no longer needed, or it can be established that the services provided by the facility can be served in an alternative location or manner that is equally accessible by the community.</p> <p>Development in and around the town centre will need to contribute towards improving town centre accessibility and reducing the impact of the ring road.</p> <p>Proposals for new retail floorspace outside the town centre will only be permitted in accordance with the impact and sequential test approach set out in SS1.</p>	
Core Strategy (2013)	<p>Policy TLC 2 Neighbourhood Centres</p> <p>To promote the sustainability of neighbourhood centres, where appropriate, new residential development will be required to make a positive contribution to each neighbourhood, enhancing local character and improving the range and accessibility of local facilities. The following principles will be applied to determine the appropriate scale of development for a particular neighbourhood:</p> <ul style="list-style-type: none"> • For residential proposals within or adjacent to a neighbourhood centre, slightly higher residential densities will be allowed, to enhance the viability and integration of the centre, and to reflect its accessibility. • All proposals will be considered as part of a design-led approach appropriate to each centre, reflecting the character and scale of each centre. The council will encourage its partners to support the network of 	Complies with the NPPF. No suggested changes.

Plan	Extant Town Centre Policies	Recommendation
	<p>centres in planning and delivering their own service provision, and seek improved public transport provision and provision for walking and cycling, as well as sufficient short-term parking provision.</p> <p>Where opportunities exist to strengthen and enhance existing neighbourhood centres, development should contribute to meeting the future needs of the local community. Details of facilities needed to support new development in the Watford Junction and Western Gateway SPAs can be found in Chapter 5.</p> <p>The vitality of neighbourhood centres will be protected and where possible enhanced; this will be achieved in the following ways:</p> <ul style="list-style-type: none"> • through encouraging a range of local facilities in the neighbourhood centres; • to control the balance of A1 and other uses through development management policies; and • through working with partners to manage issues around derelict and vacant properties. <p>Where opportunities arise to strengthen the existing neighbourhood centre network through the provision of enhanced convenience floor space proposals, which can be demonstrated do not threaten the vitality and viability of existing retail facilities, these will be encouraged.</p>	
Core Strategy (2013)	<p>Policy SS 1 Spatial Strategy (Extract)</p> <p>Retail, Leisure and Culture Retail, leisure and cultural facilities to support Watford's regional role will be focused in the town centre with an appropriate</p>	<p>The capacity figures will need to be updated in line with our study.</p>

Plan	Extant Town Centre Policies	Recommendation
	<p>level of additional facilities in the Special Policy Areas (as defined in the Special Policy Area policies) and in neighbourhood centres.</p> <p>Within the next 5 years the council seeks delivery of a net additional 10,000 sqm comparison floorspace within the town centre at Charter Place, and a 2,500 sqm (net convenience floorspace) supermarket at Ascot Road within SPA6 Western Gateway.</p> <p>New retail floor space of all types in excess of 1,000 sqm (and in excess of 2,500 sqm net convenience floorspace in SPA6) and extensions to existing stores in excess of 200 sqm will only be permitted outside the primary shopping area of the town centre if:</p> <p>a. (other than in relation to proposals set out in the policies for SPA2, SPA4 and SPA6) the proposal complies with the sequential test and</p> <p>b. (in relation to all proposals) it does not have a significant adverse impact on the vitality and viability of the town centre or the planned Charter Place investment in the town centre.</p>	<p>We support the local thresholds for Watford Town Centre. The Council may also wish to consider specific guidance for Watford North.</p>

Appendix J | Local & Neighbourhood Centre Assessment

APPENDIX J – LOCAL AND NEIGHBOURHOOD CENTRE ASSESSMENT

Dacorum Borough

Centre	Current Designation	No. of Units ¹	Composition / Notable Stores / Services	Recommended Designation
Woodhall Farm	Local Centre (District)	5	Consists of small grocery store, pharmacy, takeaway, dry cleaners and a Sainsbury's Superstore which accounts for 0.29% market share for main food shopping, and 0.45% market share for top-up shopping across the Study Area. Two medical centres and a primary school are located adjacent to the core retail area.	Local Centre
Adeyfield	Local Centre (Neighbourhood)	25	Grouping of shops including convenience store, shops, cafes pharmacy, and services. Also includes a community centre.	Local Centre
Apsley	Local Centre (Neighbourhood)	35	Comprises a High Street set up with a range of shops, services and community facilities. When considered in conjunction with the various retail warehousing and retail parks adjacent, including Sainsbury's, Wickes, and Dunelm, the centre provides a function more complex than a Local Centre.	Local Centre
Bennetts End	Local Centre (Neighbourhood)	20	Grouping of shops including convenience store, pharmacy, takeaways and cafes, and other services. The Bennetts End Community centre is also adjacent.	Local Centre
Boxmoor	Local Centre (Neighbourhood)	15	A range of mostly small, independent retail units and services.	Neighbourhood Centre

¹ Estimated based on Policy 43 of Dacorum Borough Local Plan 1991-2011 and desktop review

Centre	Current Designation	No. of Units ¹	Composition / Notable Stores / Services	Recommended Designation
Bovingdon	Local Centre (Neighbourhood)	24	Range of small retail units including Costcutter and Co-operative food stores. Permission has been granted for a Tesco Express	Local Centre
Maylands	Local Centre (Neighbourhood)	24	Rapidly growing area, with numerous extant planning permissions and development occurring. Range of shops and services will be provided.	Local Centre
Chaulden	Local Centre (Neighbourhood)	9	Small local independent retailers anchored by Co-Operative Food store.	Neighbourhood Centre
Gadebridge	Local Centre (Neighbourhood)	7	Small local independent retailers anchored by Nisa Local.	Neighbourhood Centre
Grovehill	Local Centre (Neighbourhood)	12	Small local independent retailers anchored by Tesco Express and including post office, pharmacy and medical centre.	Neighbourhood Centre
Highfield (Bellgate)	Local Centre (Neighbourhood)	10	Small strip of shops including Tesco Express and Co-operative Food store.	Neighbourhood Centre
Highfield (The Heights)	Local Centre (Neighbourhood)	6	Small local independent retailers anchored by Co-Operative Food store.	Neighbourhood Centre
Kings Langley	Local Centre (Neighbourhood)	24	High street arrangement with a range of convenience and comparison retail units as well as retail and leisure services including restaurants, cafes and servicing the wider local area.	Local Centre
Leverstock Green	Local Centre (Neighbourhood)	7	Small strip of shops including SPAR supermarket, pub and bakery.	Neighbourhood Centre
Markyate	Local Centre (Neighbourhood)	12	Series of small local shops and services including restaurants and pubs.	Neighbourhood Centre
Miswell Lane	Local Centre (Neighbourhood)	14	Small local independent retailers, located nearby to Tring and therefore functioning as a secondary neighbourhood focussed centre.	Neighbourhood Centre
Nash Mills	Local Centre (Neighbourhood)	5	Small local independent retailers anchored by Tesco Express.	Neighbourhood Centre
Northchurch	Local Centre (Neighbourhood)	5	Small neighbourhood centre comprising Tesco Express and leisure services.	Neighbourhood Centre

Centre	Current Designation	No. of Units ¹	Composition / Notable Stores / Services	Recommended Designation
Warners End	Local Centre (Neighbourhood)	10	Small shopping area anchored by Tesco Express and comprising a series of small shops and services.	Neighbourhood Centre

Hertsmere Borough

Centre	Current Designation	No. of Units ²	Composition / Notable Stores / Services	Recommended Designation
Leeming Road (Borehamwood)	Local Centre	40	Local shopping facility anchored by Cooperative Foods store and providing a range of convenience and comparison goods shops, retail services and leisure services.	Local Centre
Manor Way (Borehamwood)	Key Neighbourhood Parade	20	Local shopping strip including convenience supermarket and comparison goods stores, and retail and leisure services. A community centre is located within Ripon Park.	Local Centre
Harcourt Road (Bushey)	Key Neighbourhood Parade	9	Small strip of shops including Tesco Express and Londis and other small services.	Neighbourhood Centre
Bushey Hall Road (Bushey)	Key Neighbourhood Parade	11	Small parade of mostly independent retailers including post office, café, takeaway, and minor retail services.	Neighbourhood Centre
Cranborne Parade (Potters Bar)	Key Neighbourhood Parade	10	Small parade of shops including Tesco Express, takeaway, betting shop, tattoo parlour.	Neighbourhood Centre
Elstree Village Centre	Neighbourhood Centre	9	Small convenience store, pharmacy, newsagent and restaurant.	Neighbourhood Centre
Andrew Close (Shenley)	Neighbourhood Centre	6	Tesco Express, real estate agents, takeaway and pharmacy.	Neighbourhood Centre
Croxdale Road	Neighbourhood Parade	7	Small local independent retailers.	Neighbourhood Centre
Hartforde Road	Neighbourhood Parade	8	Small parade of mostly convenience stores including McColl's and bakery.	Neighbourhood Centre
Howard Drive	Neighbourhood Parade	10	Small local retail units including McColl's convenience store and local pharmacy.	Neighbourhood Centre
Rossington Avenue	Neighbourhood Parade	6	Small stores of neighbourhood significance including convenience store.	Neighbourhood Centre
Aldenham Road	Neighbourhood Parade	3	Small parade of three independent retailers serving neighbourhood.	Neighbourhood Centre

² Estimate based on Hertsmere Borough Council's Policies Map Local Plan 2012-2027 document and desktop review

Centre	Current Designation	No. of Units ²	Composition / Notable Stores / Services	Recommended Designation
Bournehall Avenue	Neighbourhood Parade	2	Costcutters and hairdressing salon.	Neighbourhood Centre
Bushey Mill Lane	Neighbourhood Parade	10	Small set of local independent retailers including takeaway, convenience store, and retail services.	Neighbourhood Centre
Park Avenue	Neighbourhood Parade	3	Small independent supermarket and restaurant.	Neighbourhood Centre
High Street North (1 & 2) Potters Bar	Neighbourhood Parade	20	Consists of three separate parades of shops just north of the Potters Bar providing a range of services for the local area.	Neighbourhood Centre
Battlers Green Drive	Neighbourhood Parade	5	Small local shops including small Costcutter convenience store, post office, café and restaurant.	Neighbourhood Centre

Three Rivers District

Centre	Current Designation	No. of Units ³	Composition / Notable Stores / Services	Recommended Designation
Croxley Green (Watford Road)	Local Centre	25	Centre offering a variety of convenience, comparison and services units serving the local area. Includes multiple small scale independent supermarkets.	Local Centre
Croxley Green (New Road)	Local Centre	19	Centre consisting 19 units and offering a variety of convenience and comparison units as well as retail and leisure services serving the local area. Anchored by a Co-operative Food store.	Local Centre
Mill End (Money Hill Parade)	Local Centre	37	Centre consisting of two parades of shops offering a variety of convenience and comparison goods, leisure services and retail services, servicing the local area. Main convenience store is a Welcome Rickmansworth/Co-operative Food supermarket.	Local Centre
2-8 Chalfont Road, Maple Cross	Local Centre	3	Three units including McColl's and independent takeaway.	Neighbourhood Centre
57-63 High Street, Bedmond	Other Local Shops	3	Two small independent convenience goods stores and motor garage.	Neighbourhood Centre
61-65 Station Road, Kings Langley	Other Local Shops	4	Small local independent retailers.	Neighbourhood Centre
15 Bridge Road and 5 Old Mill Road, Hunton Bridge	Other Local Shops	5	Small local independent retailers and pub serving neighbourhood.	Neighbourhood Centre
17-22 School Mead, Abbots Langley	Other Local Shops	6	Small convenience store, local takeaways and minor retail services.	Neighbourhood Centre
5-7a and Sherwood News, College Road, Abbots Langley	Other Local Shops	2	Small local independent convenience store.	Neighbourhood Centre
1-14 Katherine Place, Abbots Langley	Other Local Shops	7	Small shopping facility with car parking consisting of predominantly independent retailers and anchored by Tesco Express.	Neighbourhood Centre

³ Estimate based on list provided by Three Rivers District Council and desktop review

Centre	Current Designation	No. of Units ³	Composition / Notable Stores / Services	Recommended Designation
Sarratt Post Office, The Green, Sarratt	Other Local Shops	1	Small Londis convenience store including post office.	Individual shop
41-55 and 295-309 Baldwins Lane, Croxley Green	Other Local Shops	6	Small parade of predominantly independent retailers and Londis convenience store.	Neighbourhood Centre
193-197 Watford Road, Croxley Green	Other Local Shops	5	Small set of shops including tattoo parlour, antique store and Co-op Food supermarket.	Neighbourhood Centre
4-12 Scots Hill, 1-3 The Green and 1-4 New Parade, Croxley Green	Other Local Shops	8	Set of shops including convenience store, local services, takeaways and a public house.	Neighbourhood Centre
1-11 Tudor Parade, Mill End / Berry Lane, Mill End	Other Local Shops	7	Small parade of shops including convenience stores, pharmacy and takeaway.	Neighbourhood Centre
68-82 Church Lane, Mill End	Other Local Shops	8	Small parade of shops including convenience stores, pharmacy and takeaway.	Neighbourhood Centre
2-28 Main Avenue, Moor Park	Other Local Shops	8	Small parade of shops including convenience stores, pharmacy and post office.	Neighbourhood Centre
10-24 Hallowes Crescent, South Oxhey	Other Local Shops	8	Small parade of shops including convenience stores, pharmacy and post office.	Neighbourhood Centre
305-317 Prestwick Road, South Oxhey	Other Local Shops	6	Small parade of shops including convenience stores, pharmacy and tattoo parlour.	Neighbourhood Centre
1-18 The Parade, Delta Gain, Carpenders Park	Other Local Shops	9	Small parade of local shops including Co-op store, pharmacy, real estate agent, post office and takeaway.	Neighbourhood Centre
18-48 Little Oxhey Lane, South Oxhey	Other Local Shops	7	Small parade of shops including small convenience stores, takeaways, pharmacy, café and betting shop.	Neighbourhood Centre
46-52 Heronsgate Road, Heronsgate	Other Local Shops	4	Small retailers including independent travel agent and beauty spa.	Neighbourhood Centre

Centre	Current Designation	No. of Units ³	Composition / Notable Stores / Services	Recommended Designation
2-4 Station Approach, Chorleywood	Other Local Shops	3	Small local independent retailers including upholstery store, a vacant unit, and Sky Vision.	Neighbourhood Centre
Wyatts House and Shell Filling Station, Rickmansworth Road, Chorleywood	Other Local Shops	3	Shell filling station including convenience store and estate agents.	Neighbourhood Centre

St Albans District

Centre	Current Designation ⁴	No. of Units	Composition / Notable Stores / Services	Recommended Designation
Southdown	Neighbourhood Centre	30	Small centre providing a range of convenience and comparison goods shops, retail services and leisure services providing for the local community. Major food store is a Co-operative Food supermarket.	Local Centre
Redbourn	Neighbourhood Centre	20	High Street arrangement comprising local convenience and comparison goods stores as well as some local services, anchored by a Co-operative Food supermarket.	Local Centre
Wheathampstead	Neighbourhood Centre	23	High Street arrangement comprising local convenience and comparison goods stores as well as some local services, anchored by a Tesco Express.	Local Centre
Fleetville	Neighbourhood Centre	40	Centre providing for the local area including convenience goods stores, comparison retailers, retail services, leisure services and financial and business services. The centre includes a large Morrison's store at the edge of the centre.	Local Centre
Verulam Estate	Neighbourhood Centre	2	Waitrose store and chemist with separated car park and located adjacent to a school. The Waitrose which accounts for 0.87% market share for main food shopping, and 0.45 market share for top-up shopping across the Study Area.	Local Centre
The Quadrant Marshalswick	Neighbourhood Centre	33	A shopping facility including off road car parking and providing a comprehensive offer of convenience and comparison goods and a range of services. Anchored by Sainsbury's Local and Budgens.	Local Centre

⁴ Estimated based on St Albans District Local Plan Review 1994 and desktop review

Centre	Current Designation ⁴	No. of Units	Composition / Notable Stores / Services	Recommended Designation
London Colney	Neighbourhood Centre	24	Centre providing for the local area including convenience goods stores, comparison retailers, retail services, leisure services and financial and business services. Anchored by Co-op Food supermarket.	Local Centre
8-26 High Oaks, St Albans	Local Centre	8	Parade of shops offering mostly basic convenience goods and small scale services.	Neighbourhood Centre
34-41A Abbey Avenue, St Albans	Local Centre	5	Small parade of shops including convenience store and basic services.	Neighbourhood Centre
23-39A Vesta Avenue, St Albans	Local Centre	9	Parade of shops including convenience store and basic retail and leisure services.	Neighbourhood Centre
28-38 Abbots Avenue West, St Albans	Local Centre	5	Small parade of shops including a convenience store and hairdresser.	Neighbourhood Centre
St Brelades Place, St Albans	Local Centre	8	Small, contained shopping centre with off road parking anchored by Tesco Express and offering a cycle shop, leisure services and some health and beauty units.	Neighbourhood Centre
2-36 Beech Road, St Albans	Local Centre	12	Shopping parade featuring a Shell filling station, Tesco Express, takeaways and a pharmacy.	Neighbourhood Centre
19-23 & 40-42 Sandridge Road, St Albans	Local Centre	1	Small convenience store.	Individual Shops
15-23 Central Drive, St Albans	Local Centre	5	Small parade of shops including photographer studio, newsagents, café and hairdresser.	Neighbourhood Centre
38-52 Newhouse Park, St Albans	Local Centre	8	Small shopping facility with off street parking and offering basic convenience goods and services.	Neighbourhood Centre
399-421 & 444 Hatfield Road, St Albans	Local Centre	12	Strip of shops offering a range of local services	Neighbourhood Centre
211-217 and 243-249 Camp Road, St Albans	Local Centre	2	Two small retail units in residential area	Individual Shops

Centre	Current Designation ⁴	No. of Units	Composition / Notable Stores / Services	Recommended Designation
191-205 Cell Barnes Lane, St Albans	Local Centre	6	Shopping strip anchored by Co-operative Food supermarket and providing a range of basic services.	Neighbourhood Centre
Highfield Local Centre	Local centre	7	Local centre developed since Local Plan 1994 was adopted. Consists convenience store and basic local services.	Neighbourhood Centre
381-397 Luton Road, Harpenden	Local Centre	4	Small parade offering a convenience store and post office, dental practice and other store.	Neighbourhood Centre
95-105 Luton Road, Harpenden	Local Centre	3	Very small parade offering convenience store, beauty salon and restaurant.	Neighbourhood Centre
50-54 Westfield Road, Harpenden	Local Centre	3	Small set of shops with limited convenience goods offer.	Neighbourhood Centre
121-125 & 138-146 Lower Luton Road, Harpenden	Local Centre	4	Small shopping parade featuring Co-operative food store and takeaways.	Neighbourhood Centre
103-107 Station Road, Harpenden	Local Centre	4	Small shopping parade featuring convenience store, veterinarian and other retail units.	Neighbourhood Centre
1-5 Shenley Lane, London Colney	Local Centre	3	Centre consists of three units including two separated restaurants and one vacancy	Individual Shops
81-97 Old Watford Road, Bricket Wood	Local Centre	6	Small shopping parade offering convenience store, hair dresser, bicycle store, cleaning store and two restaurants	Neighbourhood Centre
95-127 Oakwood Road, Bricket Wood	Local Centre	9	Small shopping parade offering convenience store and local services	Neighbourhood Centre
19-27 Blackboy Wood, Bricket Wood	Local Centre	2	Small parade offering a convenience store and restaurant	Neighbourhood Centre
2A Tippendell Lane; 301—305, 337 & 192-204 Watford Road, Chiswell Green	Local Centre	9	Small parades of shops offering a range of shops and services	Neighbourhood Centre
2-30 How Wood	Local Centre	13	Small parades of shops offering a range of shops and services	Neighbourhood Centre

Centre	Current Designation ⁴	No. of Units	Composition / Notable Stores / Services	Recommended Designation
69-71, 68-76 & land south of 84 Park Street; 1-2 Park Street Lane, Park Street	Local Centre	5	Small parade of shops offering limited services	Neighbourhood Centre
15 & 8-16 High Street, Colney Heath	Local Centre	6	Small set of shops offering local services	Neighbourhood Centre

Watford Borough

Centre	Current Designation ⁵	No. of Units	Composition / Notable Stores / Services	Recommended Designation
Garston Park Parade	Neighbourhood Centre	20	Shopping parade providing a comprehensive offer of convenience and comparison retailers, as well as basic retail, leisure and financial and business services. The centre is anchored by a Londis convenience store.	Local Centre
Goodwood Parade	Neighbourhood Centre	18	Set of two shopping parades providing a range of convenience goods stores (including Nisa local), and a range of local services.	Local Centre
Longspring	Neighbourhood Centre	16	Located at the northern end of St Albans Road, and is comprised predominantly of an independent convenience store, as well as a number of takeaway stores and restaurants and retail services.	Local Centre
Station Area – Langley Road/St Alban's Road	Neighbourhood Centre	28	Series of shops located near to Watford Junction Station and at the southern edge of St Albans Road. Retail offer includes multiple small convenience outlets, takeaways and restaurants and some retail services.	Local Centre
Buckingham Road	Neighbourhood Centre	30	Strip of shops along St Albans Road comprising convenience shops, comparison goods units and a range of services.	Local Centre
Bushey Arches	Neighbourhood Centre	12	Small set of shops with a high level of vacancies, and comparison goods shops, and basic services including tattoo parlour, and takeaways.	Neighbourhood Centre

⁵ Estimated based on Watford Local Plan (Core Strategy) 2006-31 and desktop review

Centre	Current Designation ⁵	No. of Units	Composition / Notable Stores / Services	Recommended Designation
Vicarage Road	Neighbourhood Centre	20	High Street and Mall arrangement comprised of predominantly hot food takeaways, cafes and retail services. Also includes a Londis convenience store.	Local Centre
Whippendell Road East	Neighbourhood Centre	15	Shopping parade offering basic convenience and services and anchored by a Tesco Express with off street car park.	Local Centre
The Brow	Local Shops	8	Parade of shops subject to planning permission (ref: 16/01029) involving demolition and reprovision of 8 units. The proposed units are similar in size and nature to the existing and would provide for the immediate area.	Neighbourhood Centre
Euston Avenue	Local Shops	4	Small set of shops currently comprised of a small convenience store, a barber, and two vacant units.	Neighbourhood Centre
Leavesden Road	Local Shops	7	A series of disconnected shops along Leavesden Road, comprising several convenience stores, and some basic retail and leisure services.	Individual Shops
Langley Way	Local Shops	8	Small set of shops providing basic local services including convenience store, café, pharmacy and hot food takeaway.	Neighbourhood Centre
Orbital Crescent	Local Shops	7	Small set of shops including two convenience stores, a number of vacancies, and an upholsterer.	Neighbourhood Centre
The Gossamers	Local Shops	10	Small local independent retailers anchored by Co-Operative Food.	Neighbourhood Centre
Tolpits Lane	Local Shops	5	Small strip of retail units including convenience store, pharmacy and takeaway.	Neighbourhood Centre

Centre	Current Designation ⁵	No. of Units	Composition / Notable Stores / Services	Recommended Designation
Tudor Avenue	Local Shops	12	Small set of shops including public house, local convenience store, small comparisons store and basic services.	Neighbourhood Centre
Villiers Road	Local Shops	5	Road junction providing basic shopping facilities including public house, bakery and barber.	Neighbourhood Centre
Horseshoe Lane	Local Shops	3	Small set of shops at major intersection including local convenience store.	Neighbourhood Centre
Whippendell Road/Ascot Road	Local Shops	7	Small shopping parade offering a newsagents, café, hot food takeaway and betting store, and anchored by a Budgens grocery store.	Neighbourhood Centre
St Johns Road	Local Shops	9	Basic shops and services including small convenience store and two public houses.	Neighbourhood Centre
St James Road	Local Shops	2	Two small stores including convenience store.	Individual Shops
Harwoods/Hagden Lane	Local Shops	3	Small, disconnected local shops.	Individual Shops
Haines Way	Local Shops	2	Two units including Costcutter convenience store and local post office.	Individual Shops
Watford Fields	Local Shops	1	Small convenience store.	Individual Shop
North Approach	Local Shops	3	Small parade of shops including small convenience store, hair dresser, café, pharmacy and other services.	Neighbourhood Centre
Eastbury Road	Local Shops	4	Small local independent retailers including small grocery shops, dental clinic and dry cleaners.	Neighbourhood Centre