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Planning. Design. Economics.

Retail Needs Study Update 2012

Welwyn Hatfield Borough Council

13 August 2012

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1.0 Introduction

Objectives

- 1.1 Nathaniel Lichfield & Partners (NLP) was commissioned by Welwyn Hatfield Borough Council to prepare a retail needs assessment in 2007. The 2007 assessment included:
- 1 An audit of the existing retail facilities within the Borough
 - 2 A quantitative assessment of the need for new retail facilities within the Welwyn Hatfield Borough up to 2021.
- 1.2 NLP provided an update on the retail capacity assessment in November 2010, based on updated information on population, expenditure and turnover levels.
- 1.3 This report provides a further update on the retail capacity assessment for the borough based on the latest available information as above. This update report should be read alongside the 2007 Retail Assessment and 2010 Update Report.
- 1.4 The Council's previous retail study (2007) provided projections up to 2021. The Retail Study Update (2010) was published to provide updated projections for the period up to 2021 and then onwards until 2026. This 2012 Update has been prepared to provide more up to date projections rolled forward to 2029, taking into account more recent available population and expenditure data

National Planning Policy Framework (NPPF)

- 1.5 The Government consulted on its draft NPPD over the summer of 2011. Once adopted, the NPPF will replace the provisions of PPS4 'Planning for Sustainable Economic Growth' (2009) and other national policy. When adopted the Council will have to have regard to the NPPF.

2.0 Quantitative Scope for Retail Floorspace

Introduction

2.1 This section assesses the quantitative scope for new retail floorspace in Welwyn Hatfield Borough up to 2029. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping.

2.2 All monetary values expressed in this assessment are at 2010 prices unless stated otherwise. The previous 2010 Update was based on 2009 prices and the 2007 Study was based on 2005 prices. Therefore the expenditure and turnover figures in this report are not directly comparable with the figures in these previous reports.

2.3 The 2010 Update Study provided projections from 2007-2011, 2016 and 2021. The projections in this report have been rolled forward and figures are provided for 2014, 2019, 2024 and 2029.

Methodology and Data

2.4 The quantitative analysis is based on the study area as defined in the 2007 Study. The study area has been divided into nine zones for more detailed analysis. The study area within this report replicates the area adopted in the 2007 Study, and used within the 2010 Update.

2.5 The study area is shown in Appendix 1. The extent of the study area is based on postcode boundaries and the proximity of major competing shopping destinations i.e. shopping facilities within the study area expected attract a significant proportion of their trade from residents within the study area.

2.6 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2010 have been obtained.

2.7 Experian's EBS national expenditure information has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

2.8 Experian's average annual growth forecast for the period 2014 to 2029 is 0.55% for convenience goods and 3% for comparison goods. We believe the Experian's EBS growth forecast rates reflect the current economic circumstances and provide an appropriate growth rate for planning purposes. In

the long term it is more difficult to forecast year on year changes in expenditure. Experian's ultra long trend line projection for comparison goods (5.9%) is more optimistic than Experian growth forecasts. We believe long term growth is unlikely to be as high as the long term trend growth rate (5.9% per annum). However as a sensitivity analysis, we have provided high expenditure growth projections (4.45% per annum) based on the mid-point growth rate between Experian's growth forecast (3% per annum) and the higher trend line projection (5.9% per annum).

- 2.9 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors, but primarily information gathered within the household survey undertaken in 2007, with amendments to reflect changes since 2007.
- 2.10 The total turnover of identified shops within Welwyn Hatfield Borough is estimated based on penetration rates. The turnover estimate for convenience floorspace is then compared to average benchmark or average sales floorspace densities derived from Verdict Research's market report on UK Food and Grocery Retailers 2010, which provides an indication of how food stores are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail floorspace.

Population and Spending

- 2.11 The 2010 update was based on East of England population projections (December 2009). These projections are in the process of being reviewed. The house completion numbers upon which these population projections were based are likely to change. Adjustments have been made to the population projections based on the likely reduction in house completions in each authority area.

Existing Retail Floorspace

- 2.12 Convenience goods retail sales floorspace within Welwyn Hatfield Borough is 22,735 sq m net as set out in Table 1 in Appendix 1. This floorspace figure excludes comparison sales floorspace within food stores (6,069 sq m net).
- 2.13 Comparison goods retail sales floorspace within Welwyn Hatfield Borough is estimated as 78,444 sq m net as shown in Table 1 in Appendix 2, which includes comparison sales within food stores.

Existing Spending Patterns

Convenience Shopping

- 2.14 The results of the 2007 household shopper survey have been used to estimate existing shopping patterns within the study area. The estimates of market

share or penetration within each study area zone are shown in Table 5 in Appendix 1, with NLP adjustments to reflect changes since 2007.

- 2.15 Table 6 indicates that the level of convenience goods expenditure attracted to shops/stores in Welwyn Hatfield Borough in 2011 is estimated to be £219.79 million as shown in Appendix 1. Welwyn Hatfield Borough's market share of total convenience expenditure in the study area as a whole is estimated to be about 33% (£219.79 million of £663.19 million). However expenditure retention in the core zones (1 and 2) is relatively high, at 97% and 88% respectively.
- 2.16 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores listed in Table 1 in Appendix 1, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.
- 2.17 Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 1 in Appendix 1, for consistency with the use of goods based expenditure figures.
- 2.18 Average sales densities are not widely available for small convenience shops, particularly independent retailers. An average sales density of £4,200 per sqm has been adopted for small convenience shops in the Borough. The total benchmark turnover of existing convenience sales floorspace within Welwyn Hatfield Borough is £219.11 million at 2011.
- 2.19 The assessment of shopping patterns suggests that convenience goods expenditure available to facilities in Welwyn Hatfield Borough in 2011 is £219.79 million. These figures suggest that collectively convenience retail facilities in Welwyn Hatfield Borough are trading slightly above average.
- 2.20 By way of comparison, the 2011 projected available expenditure within the 2005 NLP study was about £208 million at 2009 prices. The difference (£219.79 million rather than £208 million) is predominantly explained by inflation and the price bases adopted (2009 and 2010 prices).

Comparison Shopping

- 2.21 The estimated comparison goods expenditure available to facilities within Welwyn Hatfield is £365.79 million in 2011, as shown in Table 4 in Appendix 2. This is expected to increase to £712.34 million in 2028 (Table 8 Appendix 2).
- 2.22 Welwyn Hatfield Borough's market share of total comparison goods expenditure generated within the study area is about 31%. This market share reflects the significant outflow of comparison expenditure and the retail hierarchy and the catchment areas of competing centres, e.g. Stevenage.

- 2.23 As indicated above, the current level of comparison expenditure attracted to facilities in Welwyn Hatfield Borough is £365.79 million. Based on this expenditure estimate, the average sales density for existing comparison sales floorspace (78,444 sq m net) is £4,663 per sq m net. Mintel's Retail Rankings provides company average sales density information for a selection of national retailers. This data suggests a national average sales density for national comparison retailers around £5,000 per sq m net. Based on our recent experience across the country, average sales densities for comparison floorspace can range from £2,000 to £8,000 per sq m net. The higher end of this range is usually only achieved by very successful shopping centres, which reflects the higher proportion of quality multiple retailers.
- 2.24 Comparison shopping facilities within Welwyn Hatfield Borough appear to be trading satisfactorily, but there is no evidence of over-trading in 2011.

Quantitative Capacity for Convenience Floorspace

- 2.25 The level of available convenience goods expenditure in 2014, 2019, 2024 and 2029 is shown at Tables 7 to 10 in Appendix 1.
- 2.26 The total level of convenience goods expenditure available for shops in Welwyn Hatfield Borough between 2011 and 2029 is summarised in Table 11 in Appendix 1. This table takes into account the population and expenditure projections shown in Tables 2 to 3. The benchmark turnover of existing convenience floorspace has been subtracted from the estimates of available expenditure to provide surplus expenditure estimates, as shown at the foot of Table 11 in Appendix 1.
- 2.27 Convenience expenditure attracted to shopping facilities in Welwyn Hatfield Borough is expected to increase from £219.79 million in 2011 to £228.28 million in 2019 and to £249.49 million in 2029.
- 2.28 The floorspace projections in Table 11 are based on constant markets shares, which is considered appropriate for plan making and allocation purposes. Table 11 assumes that the benchmark turnover of convenience floorspace will not increase through growth in turnover efficiency.
- 2.29 Within the Borough, future expenditure growth result in a surplus of expenditure of £0.68million in 2011 rising to £30.38 million in 2029.
- 2.30 These longer term surplus expenditure projections have been converted into potential new floorspace estimates at the foot of Table 11. Surplus expenditure in converted into floorspace estimates based on the current average sales density figure and therefore reflects the current mix of food stores and small shops in the Borough. An average sales density of £12,000 per sq m net for large food store floorspace and £4,200 per sq m net for local shops.
- 2.31 Surplus expenditure at 2019 could support 1,846 sq m sales floorspace (2,637 sq m gross), or 4,182 sq m net (5,975 sq m gross) by 2029, as shown in Table 11, Appendix 1.

Quantitative Capacity for Comparison Floorspace

- 2.32 Available comparison goods expenditure has been projected forward to 2014, 2019, 2024 and 2029 in Tables 5A to 8B in Appendix 2, and summarised in Tables 9A and 9B. Available comparison expenditure is expected to increase from £365.79 million in 2011 to £433.40 million in 2019 and to £596.33 million in 2029. Based on the high expenditure growth scenario, expenditure projections are £471.32 million in 2019 and to £745.80 million in 2029.
- 2.33 Future available expenditure is compared with the projected turnover of existing and proposed comparison retail facilities within the Borough in order to provide estimates of surplus expenditure, as shown in Tables 9A and 9B. These tables assume that the existing turnover of comparison floorspace will not increase between 2011 and 2013 due to the recession and limited projected expenditure growth. In the longer term existing floorspace within the Borough is expected to increase its benchmark turnover in real terms. A growth rate of 1.7% per annum is adopted. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.
- 2.34 Proposed floorspace commitments in Hatfield will absorb population and expenditure growth up to 2019, but continued growth will result in a comparison expenditure surplus at 2024 of +£31.21 million increasing to +£77.40 million in 2029. Surplus comparison expenditure has been converted into comparison floorspace projections at the foot of Table 9A in Appendix 2. These figures take into account retail development proposals in Hatfield town centre. Surplus expenditure at 2024 could support 5,674 sq m sales floorspace (7,452 sq m gross), or 12,718 sq m net (16,693 sq m gross) by 2029.
- 2.35 If the high expenditure growth scenario is achieved then the floorspace projections would be much higher i.e. 20,745 sq m sales floorspace (27,237 sq m gross) by 2024, or 37,298 sq m net (48,962 sq m gross) by 2029.
- 2.36 We believe the lower Experian recommended forecast growth figures are more reliable and robust.

3.0 Conclusions and Recommendations

3.1 This report provides an updated Borough wide needs assessment for retail uses in Welwyn Hatfield Borough. It provides a guide to the shopping needs of the Borough up to 2014, 2019, 2024 and 2029. The principal conclusions of the analysis contained within this study are summarised below.

3.2 Convenience goods floorspace projections have risen since the 2010 Update. This increase is primarily attributable to the reduction in benchmark turnovers because some food store company average sales densities are lower.

3.3 Comparison goods projections are lower than previously projected due to the ongoing effects of the recession.

Meeting Shopping Needs in the Borough

3.4 The floorspace projections shown in this report provide broad guidance and should be used as an indicator when assessing major retail proposals. Applicants proposing retail developments should base their supporting retail impact assessment on the approach adopted in this study, updated as necessary.

3.5 Meeting the projections between 2011 and 2019 remains the priority. The projections should not be considered to be maximum or minimum limits or targets, particularly when used to guide development control decisions. However, the projections provide a broad quantum of floorspace likely to be required and the potential phasing of development, which will assist in identifying development allocations.

3.6 Floorspace projections should not inhibit competition between retailers when located within centres, subject to the consideration of scale and impact. However, for out-of-centre proposal the impact of the proposal will need to be carefully regardless of whether it is within or exceeds the floorspace projections.

3.7 Long term forecasts up to 2024 and 2029 may be more susceptible to change, due to unforeseen circumstances. Projected surplus expenditure beyond 2019 is attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review. The implications of major retail development within and surrounding the Borough should also be monitored and the effects proposals may have on the demand for additional development in Welwyn Hatfield Borough should be considered carefully.

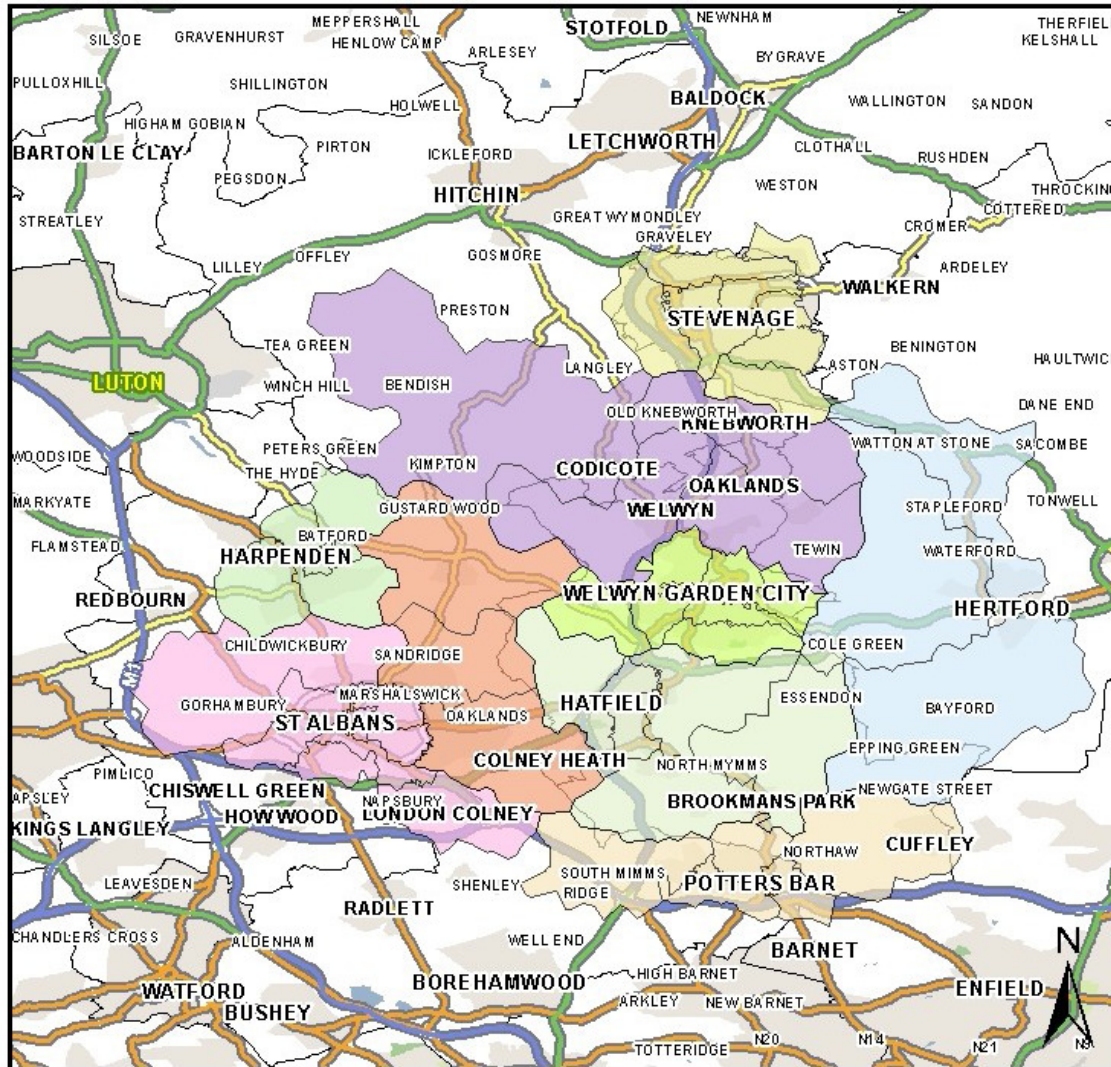
Convenience Goods Development

- 3.8 The quantitative capacity analysis indicates that in the short to medium term up to 2019, there is scope for up to approximately 2,600 sq m gross convenience floorspace. In the long term this may rise to about 6,000 sq m gross up to 2029.
- 3.9 Much of the capacity identified up to 2019 relates to local facilities within neighbourhood centres. If the capacity identified for these neighbourhood centres is provided by large food store development then the projection will be much lower because the expected sales density will be higher (12,000 per sq m net rather than £4,200 per sq m net). The revised projection for 2019 would be less than 1,100 sq m gross, increasing to 3,600 sq m gross by 2029.
- 3.10 Given the limited capacity forecast up to 2019 for large food store development, there is no need to identify additional sites in the LDF for large food store development in the short to medium term.

Comparison Goods Development

- 3.11 The baseline growth quantitative capacity indicates that there could be scope for about an additional 17,000 sq m gross floorspace in the Borough as a whole, up to 2029. This floorspace figure is over and above the development proposals in Hatfield Town Centre. This capacity arises in the latter half of the plan period after 2019.
- 3.12 The priorities for comparison development should continue to be the implementation of the development of the Hatfield town centre development and additional development in Welwyn Garden City town centre (about 5,000 sq m gross).
- 3.13 Any major comparison retail proposals outside the main centres will be required to demonstrate compliance with the sequential approach to site selection and that the proposal will not have an unacceptable impact on existing centres. Development will also need to be consistent in terms of scale and nature to the role of that centre and the catchment area the centre serves.
- 3.14 If comparison expenditure growth is stronger than expected by Experian, then the floorspace projection could be much higher (about 49,000 sq m gross by 2029). At this stage the council should seek to accommodate the baseline growth projections, but future expenditure growth will need to be monitored in the future.

Appendix 1 Convenience Goods Capacity



Welwyn Hatfield Study Area Map

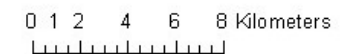
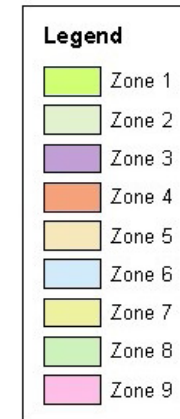


Table 1: Convenience Floorspace and Benchmark Turnover (2010 prices)

Town	Store	Net Sales Floorspace Sq M	Convenience % Sales Floorspace	Convenience Floorspace Sq M Net	Turnover Density £ per Sq M	Total Convenience Turnover £M
Welwyn Garden City	Sainsbury's, Church Road (replaced and extended)	3,200	70%	2,240	£12,599	£28.22
	Waitrose, Bridge Road	2,300	90%	2,070	£11,475	£23.75
	Marks and Spencer, Howard Centre	943	100%	943	£10,826	£10.21
	Iceland, Fretherne Road	500	95%	475	£6,697	£3.18
	Welwyn other convenience shops	900	100%	900	£4,200	£3.78
	Morrisons, Black Fan Road	2,926	85%	2,487	£12,400	£30.84
	Welwyn Garden City Total		10,769		9,115	
Hatfield	Asda, Town Centre	4,146	60%	2,488	£14,187	£35.29
	Iceland, Town Centre	530	95%	504	£6,697	£3.37
	Hatfield other convenience shops	735	100%	735	£4,200	£3.09
	Aldi, Hatfield	780	70%	546	£6,148	£3.36
	Tesco, Great North Way, Oldings Corner	5,889	60%	3,533	£12,432	£43.93
Hatfield Total		12,080		7,806		£89.03
Large Neighbourhood Centres	Co-op, Roe Green Centre, Roe Green	202	100%	202	£7,279	£1.47
	One Stop, High View	251	100%	251	£4,136	£1.04
	Lidl, Moors Walk	790	85%	672	£3,030	£2.03
	Co-op, Hall Grove	154	100%	154	£7,279	£1.12
	Co-op, Cole Green Lane, Woodhall	449	95%	427	£7,279	£3.10
	Alldays, Cole Green Lane, Woodhall	148	100%	148	£4,200	£0.62
	Other Large Neighbourhood Centres	784	100%	784	£4,200	£3.29
Large Neighbourhood Centres Total		2,778		2,637		£12.68
Small Neighbourhood Centres	Co-op, Homestead Road, Birchwood	193	100%	193	£7,279	£1.40
	One Stop, Peatree Lane, Peatree	134	100%	134	£4,200	£0.56
	Other Small Neighbourhood Centres	1,600	100%	1,600	£4,200	£6.72
Small Neighbourhood Centres Total		1,927		1,927		£8.69
Large/Small Village Centres	Co-op, Station Road, Cuffley	142	100%	142	£7,279	£1.03
	Tesco Express, Cuffley	193	100%	193	£12,432	£2.40
	Tesco Express, High Street, Welwyn	175	100%	175	£12,432	£2.18
	Alldays, Bradmore Green, Brookmans Park	140	100%	140	£4,200	£0.59
	Other Village Centres	600	100%	600	£4,200	£2.52
Village Centres Total		1,250		1,250		£8.72
GRAND TOTAL		28,804		22,735	£9,638	£219.11
				Comparison Sales Floorspace in Food Stores Sq M Net		6,069

Sources: IGD Food Store Directory
Experian Goad
Verdict Report on Grocery Retailers 2011

Table 2 : Population Projections

Zone Area	2001	2011	2014	2019	2024	2029
1 - Welwyn Garden City	43,750	48,156	48,332	48,786	49,510	50,261
2 - Hatfield	36,945	40,666	40,814	41,198	41,809	42,443
3 - Welwyn North	23,811	25,763	25,890	26,139	26,476	26,839
4 - St Albans (Rural)	25,906	27,049	26,890	26,601	26,296	25,991
5 - Potters Bar	28,093	29,733	30,166	30,936	31,785	32,716
6 - Hertford	21,180	22,540	22,925	23,547	24,206	24,956
7 - Stevenage (Urban)	76,917	77,206	77,899	79,283	80,937	82,668
8 - Harpenden	24,233	25,303	25,154	24,884	24,599	24,313
9 - St Albans (Urban)	56,891	59,404	59,055	58,420	57,750	57,081
	337,726	355,819	357,124	359,795	363,368	367,267

Sources:

Experian Population Census 2001

Chelmer East of England Population Projections Scenario 2 December 2009

WHBC dwelling number reductions

Table 3: Convenience Goods Expenditure Per Capita (2010 Prices)

Expenditure Per Capita	2011	2014	2019	2024	2029
1 - Welwyn Garden City	£1,799	£1,788	£1,825	£1,867	£1,909
2 - Hatfield	£1,631	£1,621	£1,654	£1,693	£1,731
3 - Welwyn North	£2,171	£2,158	£2,201	£2,253	£2,303
4 - St Albans (Rural)	£1,941	£1,929	£1,968	£2,014	£2,059
5 - Potters Bar	£2,062	£2,049	£2,091	£2,140	£2,188
6 - Hertford	£1,874	£1,862	£1,900	£1,945	£1,988
7 - Stevenage (Urban)	£1,755	£1,744	£1,779	£1,821	£1,861
8 - Harpenden	£1,962	£1,950	£1,989	£2,036	£2,081
9 - St Albans (Urban)	£1,904	£1,892	£1,930	£1,975	£2,019

Sources:

Experian local estimates for 2010 convenience goods expenditure per capita

(Excluding special forms of trading)

Experian Business Strategies - recommended forecast growth rates

Table 4: Total Available Convenience Goods Expenditure (£M - 2010 Prices)

Zone	2011	2014	2019	2024	2029
1 - Welwyn Garden City	£86.63	£86.58	£89.67	£93.65	£97.87
2 - Hatfield	£66.33	£66.28	£68.65	£71.70	£74.93
3 - Welwyn North	£55.93	£56.25	£59.12	£62.45	£65.96
4 - St Albans (Rural)	£52.50	£52.35	£53.81	£55.43	£57.04
5 - Potters Bar	£61.31	£61.56	£64.46	£67.83	£71.42
6 - Hertford	£42.24	£42.59	£44.98	£47.63	£50.49
7 - Stevenage (Urban)	£135.50	£135.44	£140.50	£146.73	£153.23
8 - Harpenden	£49.64	£49.50	£50.88	£52.41	£53.93
9 - St Albans (Urban)	£113.10	£112.75	£115.90	£119.40	£122.86
Total	£663.19	£663.29	£687.96	£717.23	£747.73

Sources:

Table 2 and Table 3

Table 5: Base Year 2011 Convenience Shopping Penetration Rates

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Welwyn Garden City	56%	9%	31%	4%	4%	11%	1%	1%	1%
Hatfield	25%	66%	12%	22%	2%	6%	1%	7%	7%
Local shopping Welwyn/Hatfield	16%	13%	17%	1%	5%	0%	0%	0%	0%
Welwyn Hatfield Sub-Total	97%	88%	60%	27%	11%	17%	2%	8%	8%
St Albans	1%	7%	1%	54%	11%	0%	0%	2%	80%
Stevenage	1%	1%	26%	0%	1%	10%	89%	1%	0%
Potters Bar	0%	3%	0%	0%	64%	1%	0%	0%	0%
Watford	0%	0%	0%	1%	0%	0%	0%	0%	1%
Luton	0%	0%	2%	0%	0%	0%	0%	3%	0%
Hertford	0%	0%	0%	0%	0%	61%	0%	0%	0%
Harpenden	0%	0%	4%	7%	0%	0%	0%	81%	1%
Other Outflow	1%	1%	7%	11%	13%	11%	9%	5%	10%
Other Sub-Total	3%	12%	40%	73%	89%	83%	98%	92%	92%
Market Share Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source:

Market shares based on NEMS household survey 2007 with NLP adjustments to reflect changes since 2007

Table 6: Convenience Expenditure 2011 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total Expend
Expenditure 2011	£86.63	£66.33	£55.93	£52.50	£61.31	£42.24	£135.50	£49.64	£113.10	£663.19
Welwyn Garden City	£48.51	£5.97	£17.34	£2.10	£2.45	£4.65	£1.35	£0.50	£1.13	£84.00
Hatfield	£21.66	£43.78	£6.71	£11.55	£1.23	£2.53	£1.35	£3.48	£7.92	£100.20
Local shopping facilities	£13.86	£8.62	£9.51	£0.53	£3.07	£0.00	£0.00	£0.00	£0.00	£35.58
Welwyn Hatfield Sub-Total	£84.03	£58.37	£33.56	£14.18	£6.74	£7.18	£2.71	£3.97	£9.05	£219.79
St Albans	£0.87	£4.64	£0.56	£28.35	£6.74	£0.00	£0.00	£0.99	£90.48	£132.64
Stevenage	£0.87	£0.66	£14.54	£0.00	£0.61	£4.22	£120.59	£0.50	£0.00	£142.00
Potters Bar	£0.00	£1.99	£0.00	£0.00	£39.24	£0.42	£0.00	£0.00	£0.00	£41.65
Watford	£0.00	£0.00	£0.00	£0.53	£0.00	£0.00	£0.00	£0.00	£1.13	£1.66
Luton	£0.00	£0.00	£1.12	£0.00	£0.00	£0.00	£0.00	£1.49	£0.00	£2.61
Hertford	£0.00	£0.00	£0.00	£0.00	£0.00	£25.77	£0.00	£0.00	£0.00	£25.77
Harpenden	£0.00	£0.00	£2.24	£3.68	£0.00	£0.00	£0.00	£40.21	£1.13	£47.26
Other outflow	£0.87	£0.66	£3.92	£5.78	£7.97	£4.65	£12.19	£2.48	£11.31	£49.82
Other Sub-Total	£2.60	£7.96	£22.37	£38.33	£54.56	£35.06	£132.79	£45.67	£104.06	£443.40
TOTAL	£86.63	£66.33	£55.93	£52.50	£61.31	£42.24	£135.50	£49.64	£113.10	£663.19

Source: Table 4 and 5

Table 7: Convenience Expenditure 2014 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total Expend
Expenditure 2014	£86.58	£66.28	£56.25	£52.35	£61.56	£42.59	£135.44	£49.50	£112.75	£663.29
Welwyn Garden City	£48.48	£5.97	£17.44	£2.09	£2.46	£4.68	£1.35	£0.49	£1.13	£84.10
Hatfield	£21.64	£43.74	£6.75	£11.52	£1.23	£2.56	£1.35	£3.46	£7.89	£100.15
Local shopping facilities	£13.85	£8.62	£9.56	£0.52	£3.08	£0.00	£0.00	£0.00	£0.00	£35.63
Welwyn Hatfield Sub-Total	£83.98	£58.33	£33.75	£14.13	£6.77	£7.24	£2.71	£3.96	£9.02	£219.89
St Albans	£0.87	£4.64	£0.56	£28.27	£6.77	£0.00	£0.00	£0.99	£90.20	£132.30
Stevenage	£0.87	£0.66	£14.62	£0.00	£0.62	£4.26	£120.54	£0.49	£0.00	£142.06
Potters Bar	£0.00	£1.99	£0.00	£0.00	£39.40	£0.43	£0.00	£0.00	£0.00	£41.81
Watford	£0.00	£0.00	£0.00	£0.52	£0.00	£0.00	£0.00	£0.00	£1.13	£1.65
Luton	£0.00	£0.00	£1.12	£0.00	£0.00	£0.00	£0.00	£1.48	£0.00	£2.61
Hertford	£0.00	£0.00	£0.00	£0.00	£0.00	£25.98	£0.00	£0.00	£0.00	£25.98
Harpenden	£0.00	£0.00	£2.25	£3.66	£0.00	£0.00	£0.00	£40.09	£1.13	£47.13
Other outflow	£0.87	£0.66	£3.94	£5.76	£8.00	£4.68	£12.19	£2.47	£11.28	£49.85
Other Sub-Total	£2.60	£7.95	£22.50	£38.21	£54.79	£35.35	£132.73	£45.54	£103.73	£443.40
TOTAL	£86.58	£66.28	£56.25	£52.35	£61.56	£42.59	£135.44	£49.50	£112.75	£663.29

Table 8: Convenience Expenditure 2019 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total Expend
Expenditure 2019	£89.67	£68.65	£59.12	£53.81	£64.46	£44.98	£140.50	£50.88	£115.90	£687.96
Welwyn Garden City	£50.21	£6.18	£18.33	£2.15	£2.58	£4.95	£1.41	£0.51	£1.16	£87.47
Hatfield	£22.42	£45.31	£7.09	£11.84	£1.29	£2.70	£1.41	£3.56	£8.11	£103.72
Local shopping facilities	£14.35	£8.92	£10.05	£0.54	£3.22	£0.00	£0.00	£0.00	£0.00	£37.08
Welwyn Hatfield Sub-Total	£86.98	£60.41	£35.47	£14.53	£7.09	£7.65	£2.81	£4.07	£9.27	£228.28
St Albans	£0.90	£4.81	£0.59	£29.06	£7.09	£0.00	£0.00	£1.02	£92.72	£136.18
Stevenage	£0.90	£0.69	£15.37	£0.00	£0.64	£4.50	£125.05	£0.51	£0.00	£147.65
Potters Bar	£0.00	£2.06	£0.00	£0.00	£41.25	£0.45	£0.00	£0.00	£0.00	£43.76
Watford	£0.00	£0.00	£0.00	£0.54	£0.00	£0.00	£0.00	£0.00	£1.16	£1.70
Luton	£0.00	£0.00	£1.18	£0.00	£0.00	£0.00	£0.00	£1.53	£0.00	£2.71
Hertford	£0.00	£0.00	£0.00	£0.00	£0.00	£27.44	£0.00	£0.00	£0.00	£27.44
Harpenden	£0.00	£0.00	£2.36	£3.77	£0.00	£0.00	£0.00	£41.21	£1.16	£48.50
Other outflow	£0.90	£0.69	£4.14	£5.92	£8.38	£4.95	£12.65	£2.54	£11.59	£51.75
Other Sub-Total	£2.69	£8.24	£23.65	£39.28	£57.37	£37.33	£137.69	£46.81	£106.63	£459.68
TOTAL	£89.67	£68.65	£59.12	£53.81	£64.46	£44.98	£140.50	£50.88	£115.90	£687.96

Table 9: Convenience Expenditure 2024 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total Expend
Expenditure 2024	£93.65	£71.70	£62.45	£55.43	£67.83	£47.63	£146.73	£52.41	£119.40	£717.23
Welwyn Garden City	£52.44	£6.45	£19.36	£2.22	£2.71	£5.24	£1.47	£0.52	£1.19	£91.61
Hatfield	£23.41	£47.32	£7.49	£12.19	£1.36	£2.86	£1.47	£3.67	£8.36	£108.13
Local shopping facilities	£14.98	£9.32	£10.62	£0.55	£3.39	£0.00	£0.00	£0.00	£0.00	£38.87
Welwyn Hatfield Sub-Total	£90.84	£63.09	£37.47	£14.97	£7.46	£8.10	£2.93	£4.19	£9.55	£238.61
St Albans	£0.94	£5.02	£0.62	£29.93	£7.46	£0.00	£0.00	£1.05	£95.52	£140.54
Stevenage	£0.94	£0.72	£16.24	£0.00	£0.68	£4.76	£130.59	£0.52	£0.00	£154.45
Potters Bar	£0.00	£2.15	£0.00	£0.00	£43.41	£0.48	£0.00	£0.00	£0.00	£46.04
Watford	£0.00	£0.00	£0.00	£0.55	£0.00	£0.00	£0.00	£0.00	£1.19	£1.75
Luton	£0.00	£0.00	£1.25	£0.00	£0.00	£0.00	£0.00	£1.57	£0.00	£2.82
Hertford	£0.00	£0.00	£0.00	£0.00	£0.00	£29.05	£0.00	£0.00	£0.00	£29.05
Harpenden	£0.00	£0.00	£2.50	£3.88	£0.00	£0.00	£0.00	£42.46	£1.19	£50.03
Other outflow	£0.94	£0.72	£4.37	£6.10	£8.82	£5.24	£13.21	£2.62	£11.94	£53.95
Other Sub-Total	£2.81	£8.60	£24.98	£40.46	£60.37	£39.53	£143.80	£48.22	£109.85	£478.62
TOTAL	£93.65	£71.70	£62.45	£55.43	£67.83	£47.63	£146.73	£52.41	£119.40	£717.23

Table 10: Convenience Expenditure 2029 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total Expend
Expenditure 2029	£97.87	£74.93	£65.96	£57.04	£71.42	£50.49	£153.23	£53.93	£122.86	£747.73
Welwyn Garden City	£54.81	£6.74	£20.45	£2.28	£2.86	£5.55	£1.53	£0.54	£1.23	£95.99
Hatfield	£24.47	£49.45	£7.92	£12.55	£1.43	£3.03	£1.53	£3.78	£8.60	£112.75
Local shopping facilities	£15.66	£9.74	£11.21	£0.57	£3.57	£0.00	£0.00	£0.00	£0.00	£40.75
Welwyn Hatfield Sub-Total	£94.93	£65.93	£39.58	£15.40	£7.86	£8.58	£3.06	£4.31	£9.83	£249.49
St Albans	£0.98	£5.24	£0.66	£30.80	£7.86	£0.00	£0.00	£1.08	£98.29	£144.91
Stevenage	£0.98	£0.75	£17.15	£0.00	£0.71	£5.05	£136.37	£0.54	£0.00	£161.55
Potters Bar	£0.00	£2.25	£0.00	£0.00	£45.71	£0.50	£0.00	£0.00	£0.00	£48.46
Watford	£0.00	£0.00	£0.00	£0.57	£0.00	£0.00	£0.00	£0.00	£1.23	£1.80
Luton	£0.00	£0.00	£1.32	£0.00	£0.00	£0.00	£0.00	£1.62	£0.00	£2.94
Hertford	£0.00	£0.00	£0.00	£0.00	£0.00	£30.80	£0.00	£0.00	£0.00	£30.80
Harpenden	£0.00	£0.00	£2.64	£3.99	£0.00	£0.00	£0.00	£43.69	£1.23	£51.55
Other outflow	£0.98	£0.75	£4.62	£6.27	£9.28	£5.55	£13.79	£2.70	£12.29	£56.23
Other Sub-Total	£2.94	£8.99	£26.38	£41.64	£63.57	£41.91	£150.16	£49.62	£113.03	£498.24
TOTAL	£97.87	£74.93	£65.96	£57.04	£71.42	£50.49	£153.23	£53.93	£122.86	£747.73

Table 11: Convenience Floorspace Projections (£Million)

Town	2011	2014	2019	2024	2029
Available Expenditure in District					
Welwyn Garden City	£84.00	£84.10	£87.47	£91.61	£95.99
Hatfield	£100.20	£100.15	£103.72	£108.13	£112.75
Neighbourhood/Village Centres	£35.58	£35.63	£37.08	£38.87	£40.75
Total	£219.79	£219.89	£228.28	£238.61	£249.49
Benchmark Turnover of Existing Facilities					
Welwyn Garden City	£99.99	£99.99	£99.99	£99.99	£99.99
Hatfield	£89.03	£89.03	£89.03	£89.03	£89.03
Neighbourhood/Village Centres	£30.09	£30.09	£30.09	£30.09	£30.09
Total	£219.11	£219.11	£219.11	£219.11	£219.11
Surplus Expenditure					
Welwyn Garden City	-£15.99	-£15.89	-£12.52	-£8.38	-£4.00
Hatfield	£11.17	£11.12	£14.69	£19.10	£23.72
Neighbourhood/Village Centres	£5.49	£5.54	£6.99	£8.78	£10.66
Total	£0.68	£0.78	£9.17	£19.50	£30.38
Turnover Density for New Floorspace £ per Sq M					
Welwyn Garden City	£12,000	£12,000	£12,000	£12,000	£12,000
Hatfield	£12,000	£12,000	£12,000	£12,000	£12,000
Neighbourhood/Village Centres	£4,200	£4,200	£4,200	£4,200	£4,200
Sales Floorspace (Sq m Net)					
Welwyn Garden City	-1,332	-1,324	-1,043	-698	-333
Hatfield	931	927	1,224	1,592	1,976
Neighbourhood/Village Centres	1,308	1,319	1,665	2,090	2,539
Total	907	922	1,846	2,983	4,182
Gross Floorspace (Sq M Gross)					
Welwyn Garden City	-1,903	-1,891	-1,490	-997	-476
Hatfield	1,330	1,324	1,749	2,274	2,824
Neighbourhood/Village Centres	1,868	1,885	2,378	2,985	3,627
Total	1,295	1,318	2,637	4,262	5,975

Sources: Tables 1, 6 to 10

Appendix 2 Comparison Goods Capacity

Table 1 - Comparison Floorspace in Town Centres and Food Stores

Town Centre	Net Sales Floorspace Sq M
Welwyn Garden City	
Town centre comparison shops	13,500
John Lewis department store	20,000
Marks & Spencer	2,500
Debenhams Desire	2,400
Sainsbury's, Church Road (as replaced and extended)	960
Waitrose, Bridge Road	230
Total Town Centre	39,590
Hatfield Town Centre	
Town centre comparison shops	4,065
Asda, Town Centre	1,658
Total Town Centre	5,723
Local Centres	
Large neighbourhood centre comparison shops	1,681
Small neighbourhood centre comparison shops	1,400
Large village centre comparison shops	1,877
Small village centre comparison shops	266
Total Local Centres	5,224
Hatfield Galleria comparison shops	14,000
Out of Centre	
Comet, Comet Way	1,167
Habitat, Comet Way*	2,490
Homebase, Comet Way*	3,939
B&Q, Swallowfields	3,516
Morrisons, Black Fan Road	439
Tesco, Great North Way, Oldings Corner	2,356
Total Out of Centre	13,907
GRAND TOTAL	78,444

* Including estimate for Mezzanine

Table 2A: Comparison Goods Expenditure Per Capita (2010 Prices) - Baseline Growth

Expenditure Per Capita	2011	2014	2019	2024	2029
1 - Welwyn Garden City	£2,641	£2,750	£3,170	£3,674	£4,260
2 - Hatfield	£2,447	£2,547	£2,936	£3,404	£3,946
3 - Welwyn North	£3,520	£3,665	£4,225	£4,898	£5,678
4 - St Albans (Rural)	£3,178	£3,308	£3,813	£4,421	£5,125
5 - Potters Bar	£3,253	£3,387	£3,905	£4,526	£5,247
6 - Hertford	£2,938	£3,059	£3,526	£4,087	£4,738
7 - Stevenage (Urban)	£2,574	£2,680	£3,089	£3,581	£4,152
8 - Harpenden	£3,280	£3,415	£3,936	£4,563	£5,290
9 - St Albans (Urban)	£3,041	£3,166	£3,649	£4,231	£4,905

Sources:

Experian local estimates for 2010 comparison goods expenditure per capita

(Excluding special forms of trading)

Experian Business Strategies - recommended forecast growth rates

Table 2B: Comparison Goods Expenditure Per Capita (2010 Prices) - High Growth

Expenditure Per Capita	2011	2014	2019	2024	2029
1 - Welwyn Garden City	£2,641	£2,789	£3,447	£4,285	£5,327
2 - Hatfield	£2,447	£2,583	£3,193	£3,970	£4,935
3 - Welwyn North	£3,520	£3,717	£4,594	£5,712	£7,101
4 - St Albans (Rural)	£3,178	£3,355	£4,147	£5,156	£6,409
5 - Potters Bar	£3,253	£3,435	£4,246	£5,279	£6,563
6 - Hertford	£2,938	£3,102	£3,834	£4,767	£5,926
7 - Stevenage (Urban)	£2,574	£2,718	£3,360	£4,177	£5,192
8 - Harpenden	£3,280	£3,463	£4,280	£5,321	£6,616
9 - St Albans (Urban)	£3,041	£3,211	£3,969	£4,934	£6,134

Sources:

Experian local estimates for 2010 comparison goods expenditure per capita

(Excluding special forms of trading)

Experian Business Strategies - recommended forecast growth rates up to 2013

Mid-point between Experina forecasts and ultra long term growth rate after 2013

Table 3A: Total Comparison Goods Expenditure (£M - 2010 Prices) - Baseline Growth

Zone	2011	2014	2019	2024	2029
1 - Welwyn Garden City	£127.18	£132.90	£154.63	£181.92	£214.10
2 - Hatfield	£99.51	£103.97	£120.97	£142.31	£167.48
3 - Welwyn North	£90.68	£94.89	£110.43	£129.67	£152.38
4 - St Albans (Rural)	£85.96	£88.96	£101.44	£116.25	£133.20
5 - Potters Bar	£96.72	£102.18	£120.79	£143.87	£171.67
6 - Hertford	£66.22	£70.12	£83.02	£98.93	£118.25
7 - Stevenage (Urban)	£198.73	£208.78	£244.93	£289.86	£343.22
8 - Harpenden	£82.99	£85.89	£97.94	£112.24	£128.61
9 - St Albans (Urban)	£180.65	£186.97	£213.20	£244.32	£279.95
Total	£1,028.65	£1,074.67	£1,247.35	£1,459.38	£1,708.85

Sources:

Table 2A

Table 3B: Total Comparison Goods Expenditure (£M - 2010 Prices) - High Growth

Zone	2011	2014	2019	2024	2029
1 - Welwyn Garden City	£127.18	£134.78	£168.16	£212.16	£267.76
2 - Hatfield	£99.51	£105.43	£131.55	£165.97	£209.46
3 - Welwyn North	£90.68	£96.23	£120.09	£151.22	£190.58
4 - St Albans (Rural)	£85.96	£90.21	£110.31	£135.57	£166.59
5 - Potters Bar	£96.72	£103.62	£131.36	£167.79	£214.70
6 - Hertford	£66.22	£71.11	£90.28	£115.38	£147.89
7 - Stevenage (Urban)	£198.73	£211.72	£266.36	£338.05	£429.25
8 - Harpenden	£82.99	£87.10	£106.51	£130.90	£160.85
9 - St Albans (Urban)	£180.65	£189.60	£231.85	£284.94	£350.13
Total	£1,028.65	£1,089.80	£1,356.49	£1,701.98	£2,137.20

Sources:

Table 2B

Table 4: Comparison Shopping Penetration Rates and Available Expenditure 2011

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expenditure
Expenditure 2011	£127.18	£99.51	£90.68	£85.96	£96.72	£66.22	£198.73	£82.99	£180.65	n/a	£1,028.65
Market Share											
Welwyn Garden City town centre	60%	24%	32%	14%	16%	20%	5%	21%	6%	10%	
Hatfield town centre	7%	21%	1%	5%	4%	1%	0%	1%	1%	0%	
Neighbourhood/Village Centres	1%	4%	3%	1%	2%	4%	0%	2%	2%	0%	
Hatfield Galleria	3%	7%	3%	3%	2%	0%	1%	2%	1%	40%	
Out-of-centre stores	9%	8%	3%	4%	5%	1%	0%	0%	0%	10%	
Welwyn Hatfield Sub-Total	80%	64%	42%	27%	29%	26%	6%	26%	10%	n/a	
St Albans	3%	10%	3%	47%	4%	1%	1%	17%	62%	n/a	
Potters Bar	0%	1%	0%	0%	17%	0%	0%	0%	0%	n/a	
Watford	1%	2%	0%	5%	3%	0%	1%	4%	9%	n/a	
Luton	0%	1%	4%	4%	0%	0%	1%	19%	1%	n/a	
London Colney	0%	4%	1%	7%	11%	1%	1%	2%	7%	n/a	
Stevenage	10%	10%	30%	2%	2%	17%	81%	2%	1%	n/a	
Other outflow	6%	8%	20%	8%	34%	55%	9%	30%	10%	n/a	
Other Sub-Total	20%	36%	58%	73%	71%	74%	94%	74%	90%	n/a	
TOTAL MARKET SHARE	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a	
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow Expend.	Total £M
Turnover £M											
Welwyn Garden City town centre	£76.31	£23.88	£29.02	£12.03	£15.48	£13.24	£9.94	£17.43	£10.84	£23.13	£231.30
Hatfield town centre	£8.90	£20.90	£0.91	£4.30	£3.87	£0.66	£0.00	£0.83	£1.81	£0.00	£42.17
Neighbourhood/Village Centres	£1.27	£3.98	£2.72	£0.86	£1.93	£2.65	£0.00	£1.66	£3.61	£0.00	£18.69
Hatfield Galleria	£3.82	£6.97	£2.72	£2.58	£1.93	£0.00	£1.99	£1.66	£1.81	£15.65	£39.11
Out-of-centre stores	£11.45	£7.96	£2.72	£3.44	£4.84	£0.66	£0.00	£0.00	£0.00	£3.45	£34.52
Welwyn Hatfield Sub-Total	£101.75	£63.69	£38.09	£23.21	£28.05	£17.22	£11.92	£21.58	£18.06	£42.23	£365.79
St Albans	£3.82	£9.95	£2.72	£40.40	£3.87	£0.66	£1.99	£14.11	£112.00	n/a	£189.52
Potters Bar	£0.00	£1.00	£0.00	£0.00	£16.44	£0.00	£0.00	£0.00	£0.00	n/a	£17.44
Watford	£1.27	£1.99	£0.00	£4.30	£2.90	£0.00	£1.99	£3.32	£16.26	n/a	£32.03
Luton	£0.00	£1.00	£3.63	£3.44	£0.00	£0.00	£1.99	£15.77	£1.81	n/a	£27.62
London Colney	£0.00	£3.98	£0.91	£6.02	£10.64	£0.66	£1.99	£1.66	£12.65	n/a	£38.50
Stevenage	£12.72	£9.95	£27.21	£1.72	£1.93	£11.26	£160.97	£1.66	£1.81	n/a	£229.22
Other outflow	£7.63	£7.96	£18.14	£6.88	£32.88	£36.42	£17.89	£24.90	£18.06	n/a	£170.76
Other Sub-Total	£25.44	£35.82	£52.60	£62.75	£68.67	£49.00	£186.81	£61.42	£162.58	n/a	£705.09
TOTAL TURNOVER	£127.18	£99.51	£90.68	£85.96	£96.72	£66.22	£198.73	£82.99	£180.65	£42.23	£1,070.88

Sources:

NEMS Household and Street Surveys 2007 and NLP adjustments

Table 5A: Comparison Shopping Penetration Rates and Available Expenditure 2014 (baseline growth)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expenditure
Expenditure 2014	£132.90	£103.97	£94.89	£88.96	£102.18	£70.12	£208.78	£85.89	£186.97	n/a	£1,074.67
Market Share											
Welwyn Garden City town centre	60%	24%	32%	14%	16%	20%	5%	21%	6%	10%	
Hatfield town centre	7%	21%	1%	5%	4%	1%	0%	1%	1%	0%	
Neighbourhood/Village Centres	1%	4%	3%	1%	2%	4%	0%	2%	2%	0%	
Hatfield Galleria	3%	7%	3%	3%	2%	0%	1%	2%	1%	40%	
Out-of-centre stores	9%	8%	3%	4%	5%	1%	0%	0%	0%	10%	
Welwyn Hatfield Sub-Total	80%	64%	42%	27%	29%	26%	6%	26%	10%	n/a	
St Albans	3%	10%	3%	47%	4%	1%	1%	17%	62%	n/a	
Potters Bar	0%	1%	0%	0%	17%	0%	0%	0%	0%	n/a	
Watford	1%	2%	0%	5%	3%	0%	1%	4%	9%	n/a	
Luton	0%	1%	4%	4%	0%	0%	1%	19%	1%	n/a	
London Colney	0%	4%	1%	7%	11%	1%	1%	2%	7%	n/a	
Stevenage	10%	10%	30%	2%	2%	17%	81%	2%	1%	n/a	
Other outflow	6%	8%	20%	8%	34%	55%	9%	30%	10%	n/a	
Other Sub-Total	20%	36%	58%	73%	71%	74%	94%	74%	90%	n/a	
TOTAL MARKET SHARE	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a	
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow Expend.	Total £M
Turnover £M											
Welwyn Garden City town centre	£79.74	£24.95	£30.36	£12.45	£16.35	£14.02	£10.44	£18.04	£11.22	£24.18	£241.76
Hatfield town centre	£9.30	£21.83	£0.95	£4.45	£4.09	£0.70	£0.00	£0.86	£1.87	£0.00	£44.05
Neighbourhood/Village Centres	£1.33	£4.16	£2.85	£0.89	£2.04	£2.80	£0.00	£1.72	£3.74	£0.00	£19.53
Hatfield Galleria	£3.99	£7.28	£2.85	£2.67	£2.04	£0.00	£2.09	£1.72	£1.87	£16.33	£40.83
Out-of-centre stores	£11.96	£8.32	£2.85	£3.56	£5.11	£0.70	£0.00	£0.00	£0.00	£3.61	£36.10
Welwyn Hatfield Sub-Total	£106.32	£66.54	£39.85	£24.02	£29.63	£18.23	£12.53	£22.33	£18.70	£44.12	£382.28
St Albans	£3.99	£10.40	£2.85	£41.81	£4.09	£0.70	£2.09	£14.60	£115.92	n/a	£196.44
Potters Bar	£0.00	£1.04	£0.00	£0.00	£17.37	£0.00	£0.00	£0.00	£0.00	n/a	£18.41
Watford	£1.33	£2.08	£0.00	£4.45	£3.07	£0.00	£2.09	£3.44	£16.83	n/a	£33.27
Luton	£0.00	£1.04	£3.80	£3.56	£0.00	£0.00	£2.09	£16.32	£1.87	n/a	£28.67
London Colney	£0.00	£4.16	£0.95	£6.23	£11.24	£0.70	£2.09	£1.72	£13.09	n/a	£40.17
Stevenage	£13.29	£10.40	£28.47	£1.78	£2.04	£11.92	£169.11	£1.72	£1.87	n/a	£240.60
Other outflow	£7.97	£8.32	£18.98	£7.12	£34.74	£38.57	£18.79	£25.77	£18.70	n/a	£178.95
Other Sub-Total	£26.58	£37.43	£55.04	£64.94	£72.55	£51.89	£196.25	£63.56	£168.27	n/a	£736.51
TOTAL TURNOVER	£132.90	£103.97	£94.89	£88.96	£102.18	£70.12	£208.78	£85.89	£186.97	£44.12	£1,118.79

Table 5B: Comparison Shopping Penetration Rates and Available Expenditure 2014 (high growth)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expenditure
Expenditure 2014	£134.78	£105.43	£96.23	£90.21	£103.62	£71.11	£211.72	£87.10	£189.60	n/a	£1,089.80
Market Share											
Welwyn Garden City town centre	60%	24%	32%	14%	16%	20%	5%	21%	6%	10%	
Hatfield town centre	7%	21%	1%	5%	4%	1%	0%	1%	1%	0%	
Neighbourhood/Village Centres	1%	4%	3%	1%	2%	4%	0%	2%	2%	0%	
Hatfield Galleria	3%	7%	3%	3%	2%	0%	1%	2%	1%	40%	
Out-of-centre stores	9%	8%	3%	4%	5%	1%	0%	0%	0%	10%	
Welwyn Hatfield Sub-Total	80%	64%	42%	27%	29%	26%	6%	26%	10%	n/a	
St Albans	3%	10%	3%	47%	4%	1%	1%	17%	62%	n/a	
Potters Bar	0%	1%	0%	0%	17%	0%	0%	0%	0%	n/a	
Watford	1%	2%	0%	5%	3%	0%	1%	4%	9%	n/a	
Luton	0%	1%	4%	4%	0%	0%	1%	19%	1%	n/a	
London Colney	0%	4%	1%	7%	11%	1%	1%	2%	7%	n/a	
Stevenage	10%	10%	30%	2%	2%	17%	81%	2%	1%	n/a	
Other outflow	6%	8%	20%	8%	34%	55%	9%	30%	10%	n/a	
Other Sub-Total	20%	36%	58%	73%	71%	74%	94%	74%	90%	n/a	
TOTAL MARKET SHARE	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a	
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow Expend.	Total £M
Turnover £M											
Welwyn Garden City town centre	£80.87	£25.30	£30.79	£12.63	£16.58	£14.22	£10.59	£18.29	£11.38	£24.52	£245.16
Hatfield town centre	£9.43	£22.14	£0.96	£4.51	£4.14	£0.71	£0.00	£0.87	£1.90	£0.00	£44.67
Neighbourhood/Village Centres	£1.35	£4.22	£2.89	£0.90	£2.07	£2.84	£0.00	£1.74	£3.79	£0.00	£19.80
Hatfield Galleria	£4.04	£7.38	£2.89	£2.71	£2.07	£0.00	£2.12	£1.74	£1.90	£16.56	£41.41
Out-of-centre stores	£12.13	£8.43	£2.89	£3.61	£5.18	£0.71	£0.00	£0.00	£0.00	£3.66	£36.61
Welwyn Hatfield Sub-Total	£107.82	£67.48	£40.41	£24.36	£30.05	£18.49	£12.70	£22.65	£18.96	£44.74	£387.66
St Albans	£4.04	£10.54	£2.89	£42.40	£4.14	£0.71	£2.12	£14.81	£117.55	n/a	£199.21
Potters Bar	£0.00	£1.05	£0.00	£0.00	£17.62	£0.00	£0.00	£0.00	£0.00	n/a	£18.67
Watford	£1.35	£2.11	£0.00	£4.51	£3.11	£0.00	£2.12	£3.48	£17.06	n/a	£33.74
Luton	£0.00	£1.05	£3.85	£3.61	£0.00	£0.00	£2.12	£16.55	£1.90	n/a	£29.07
London Colney	£0.00	£4.22	£0.96	£6.31	£11.40	£0.71	£2.12	£1.74	£13.27	n/a	£40.74
Stevenage	£13.48	£10.54	£28.87	£1.80	£2.07	£12.09	£171.49	£1.74	£1.90	n/a	£243.98
Other outflow	£8.09	£8.43	£19.25	£7.22	£35.23	£39.11	£19.05	£26.13	£18.96	n/a	£181.47
Other Sub-Total	£26.96	£37.96	£55.81	£65.85	£73.57	£52.62	£199.02	£64.46	£170.64	n/a	£746.88
TOTAL TURNOVER	£134.78	£105.43	£96.23	£90.21	£103.62	£71.11	£211.72	£87.10	£189.60	£44.74	£1,134.54

Table 6A: Comparison Shopping Penetration Rates and Available Expenditure 2019 (baseline growth)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expenditure
Expenditure 2019	£154.63	£120.97	£110.43	£101.44	£120.79	£83.02	£244.93	£97.94	£213.20	n/a	£1,247.35
Market Share											
Welwyn Garden City town centre	57%	22%	30%	13%	15%	19%	3%	21%	6%	10%	
Hatfield town centre	9%	27%	2%	7%	6%	2%	0%	1%	1%	0%	
Neighbourhood/Village Centres	1%	4%	3%	1%	2%	4%	0%	2%	2%	0%	
Hatfield Galleria	3%	5%	3%	3%	2%	0%	1%	2%	1%	40%	
Out-of-centre stores	8%	6%	3%	4%	5%	1%	0%	0%	0%	10%	
Welwyn Hatfield Sub-Total	78%	64%	41%	28%	30%	26%	4%	26%	10%	n/a	
St Albans	2%	9%	3%	43%	4%	1%	1%	17%	61%	n/a	
Potters Bar	0%	1%	0%	0%	15%	0%	0%	0%	0%	n/a	
Watford	1%	2%	0%	5%	3%	0%	1%	4%	9%	n/a	
Luton	0%	1%	4%	4%	0%	0%	1%	19%	1%	n/a	
London Colney	0%	4%	1%	7%	11%	1%	1%	2%	7%	n/a	
Stevenage	13%	12%	34%	5%	4%	20%	90%	3%	2%	n/a	
Other outflow	6%	7%	17%	8%	33%	52%	2%	29%	10%	n/a	
Other Sub-Total	22%	36%	59%	72%	70%	74%	96%	74%	90%	n/a	
TOTAL MARKET SHARE	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a	
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow Expend.	Total £M
Turnover £M											
Welwyn Garden City town centre	£88.14	£26.61	£33.13	£13.19	£18.12	£15.77	£7.35	£20.57	£12.79	£26.19	£261.86
Hatfield town centre	£13.92	£32.66	£2.21	£7.10	£7.25	£1.66	£0.00	£0.98	£2.13	£0.00	£67.91
Neighbourhood/Village Centres	£1.55	£4.84	£3.31	£1.01	£2.42	£3.32	£0.00	£1.96	£4.26	£0.00	£22.67
Hatfield Galleria	£4.64	£6.05	£3.31	£3.04	£2.42	£0.00	£2.45	£1.96	£2.13	£17.33	£43.33
Out-of-centre stores	£12.37	£7.26	£3.31	£4.06	£6.04	£0.83	£0.00	£0.00	£0.00	£3.76	£37.63
Welwyn Hatfield Sub-Total	£120.61	£77.42	£45.28	£28.40	£36.24	£21.59	£9.80	£25.47	£21.32	£47.28	£433.40
St Albans	£3.09	£10.89	£3.31	£43.62	£4.83	£0.83	£2.45	£16.65	£130.05	n/a	£215.72
Potters Bar	£0.00	£1.21	£0.00	£0.00	£18.12	£0.00	£0.00	£0.00	£0.00	n/a	£19.33
Watford	£1.55	£2.42	£0.00	£5.07	£3.62	£0.00	£2.45	£3.92	£19.19	n/a	£38.22
Luton	£0.00	£1.21	£4.42	£4.06	£0.00	£0.00	£2.45	£18.61	£2.13	n/a	£32.87
London Colney	£0.00	£4.84	£1.10	£7.10	£13.29	£0.83	£2.45	£1.96	£14.92	n/a	£46.49
Stevenage	£20.10	£14.52	£37.55	£5.07	£4.83	£16.60	£220.44	£2.94	£4.26	n/a	£326.31
Other outflow	£9.28	£8.47	£18.77	£8.12	£39.86	£43.17	£4.90	£28.40	£21.32	n/a	£182.29
Other Sub-Total	£34.02	£43.55	£65.15	£73.04	£84.55	£61.43	£235.13	£72.48	£191.88	n/a	£861.23
TOTAL TURNOVER	£154.63	£120.97	£110.43	£101.44	£120.79	£83.02	£244.93	£97.94	£213.20	£47.28	£1,294.63

Table 6B: Comparison Shopping Penetration Rates and Available Expenditure 2019 (high growth)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expenditure
Expenditure 2019	£168.16	£131.55	£120.09	£110.31	£131.36	£90.28	£266.36	£106.51	£231.85	n/a	£1,356.49
Market Share											
Welwyn Garden City town centre	57%	22%	30%	13%	15%	19%	3%	21%	6%	10%	
Hatfield town centre	9%	27%	2%	7%	6%	2%	0%	1%	1%	0%	
Neighbourhood/Village Centres	1%	4%	3%	1%	2%	4%	0%	2%	2%	0%	
Hatfield Galleria	3%	5%	3%	3%	2%	0%	1%	2%	1%	40%	
Out-of-centre stores	8%	6%	3%	4%	5%	1%	0%	0%	0%	10%	
Welwyn Hatfield Sub-Total	78%	64%	41%	28%	30%	26%	4%	26%	10%	n/a	
St Albans	2%	9%	3%	43%	4%	1%	1%	17%	61%	n/a	
Potters Bar	0%	1%	0%	0%	15%	0%	0%	0%	0%	n/a	
Watford	1%	2%	0%	5%	3%	0%	1%	4%	9%	n/a	
Luton	0%	1%	4%	4%	0%	0%	1%	19%	1%	n/a	
London Colney	0%	4%	1%	7%	11%	1%	1%	2%	7%	n/a	
Stevenage	13%	12%	34%	5%	4%	20%	90%	3%	2%	n/a	
Other outflow	6%	7%	17%	8%	33%	52%	2%	29%	10%	n/a	
Other Sub-Total	22%	36%	59%	72%	70%	74%	96%	74%	90%	n/a	
TOTAL MARKET SHARE	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a	
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow Expend.	Total £M
Turnover £M											
Welwyn Garden City town centre	£95.85	£28.94	£36.03	£14.34	£19.70	£17.15	£7.99	£22.37	£13.91	£28.48	£284.77
Hatfield town centre	£15.13	£35.52	£2.40	£7.72	£7.88	£1.81	£0.00	£1.07	£2.32	£0.00	£73.85
Neighbourhood/Village Centres	£1.68	£5.26	£3.60	£1.10	£2.63	£3.61	£0.00	£2.13	£4.64	£0.00	£24.66
Hatfield Galleria	£5.04	£6.58	£3.60	£3.31	£2.63	£0.00	£2.66	£2.13	£2.32	£18.85	£47.12
Out-of-centre stores	£13.45	£7.89	£3.60	£4.41	£6.57	£0.90	£0.00	£0.00	£0.00	£4.09	£40.92
Welwyn Hatfield Sub-Total	£131.17	£84.19	£49.24	£30.89	£39.41	£23.47	£10.65	£27.69	£23.19	£51.42	£471.32
St Albans	£3.36	£11.84	£3.60	£47.43	£5.25	£0.90	£2.66	£18.11	£141.43	n/a	£234.60
Potters Bar	£0.00	£1.32	£0.00	£0.00	£19.70	£0.00	£0.00	£0.00	£0.00	n/a	£21.02
Watford	£1.68	£2.63	£0.00	£5.52	£3.94	£0.00	£2.66	£4.26	£20.87	n/a	£41.56
Luton	£0.00	£1.32	£4.80	£4.41	£0.00	£0.00	£2.66	£20.24	£2.32	n/a	£35.75
London Colney	£0.00	£5.26	£1.20	£7.72	£14.45	£0.90	£2.66	£2.13	£16.23	n/a	£50.56
Stevenage	£21.86	£15.79	£40.83	£5.52	£5.25	£18.06	£239.72	£3.20	£4.64	n/a	£354.86
Other outflow	£10.09	£9.21	£20.42	£8.83	£43.35	£46.95	£5.33	£30.89	£23.19	n/a	£198.24
Other Sub-Total	£37.00	£47.36	£70.85	£79.43	£91.95	£66.81	£255.71	£78.82	£208.67	n/a	£936.59
TOTAL TURNOVER	£168.16	£131.55	£120.09	£110.31	£131.36	£90.28	£266.36	£106.51	£231.85	£51.42	£1,407.91

Table 7A: Comparison Shopping Penetration Rates and Available Expenditure 2024 (baseline growth)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expenditure
Expenditure 2024	£181.92	£142.31	£129.67	£116.25	£143.87	£98.93	£289.86	£112.24	£244.32	n/a	£1,459.38
Market Share											
Welwyn Garden City town centre	57%	22%	30%	13%	15%	19%	3%	21%	6%	10%	
Hatfield town centre	9%	27%	2%	7%	6%	2%	0%	1%	1%	0%	
Neighbourhood/Village Centres	1%	4%	3%	1%	2%	4%	0%	2%	2%	0%	
Hatfield Galleria	3%	5%	3%	3%	2%	0%	1%	2%	1%	40%	
Out-of-centre stores	8%	6%	3%	4%	5%	1%	0%	0%	0%	10%	
Welwyn Hatfield Sub-Total	78%	64%	41%	28%	30%	26%	4%	26%	10%	n/a	
St Albans	2%	9%	3%	43%	4%	1%	1%	17%	61%	n/a	
Potters Bar	0%	1%	0%	0%	15%	0%	0%	0%	0%	n/a	
Watford	1%	2%	0%	5%	3%	0%	1%	4%	9%	n/a	
Luton	0%	1%	4%	4%	0%	0%	1%	19%	1%	n/a	
London Colney	0%	4%	1%	7%	11%	1%	1%	2%	7%	n/a	
Stevenage	13%	12%	34%	5%	4%	20%	90%	3%	2%	n/a	
Other outflow	6%	7%	17%	8%	33%	52%	2%	29%	10%	n/a	
Other Sub-Total	22%	36%	59%	72%	70%	74%	96%	74%	90%	n/a	
TOTAL MARKET SHARE	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a	
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow Expend.	Total £M
Turnover £M											
Welwyn Garden City town centre	£103.70	£31.31	£38.90	£15.11	£21.58	£18.80	£8.70	£23.57	£14.66	£30.70	£307.02
Hatfield town centre	£16.37	£38.42	£2.59	£8.14	£8.63	£1.98	£0.00	£1.12	£2.44	£0.00	£79.71
Neighbourhood/Village Centres	£1.82	£5.69	£3.89	£1.16	£2.88	£3.96	£0.00	£2.24	£4.89	£0.00	£26.53
Hatfield Galleria	£5.46	£7.12	£3.89	£3.49	£2.88	£0.00	£2.90	£2.24	£2.44	£20.28	£50.69
Out-of-centre stores	£14.55	£8.54	£3.89	£4.65	£7.19	£0.99	£0.00	£0.00	£0.00	£4.42	£44.24
Welwyn Hatfield Sub-Total	£141.90	£91.08	£53.16	£32.55	£43.16	£25.72	£11.59	£29.18	£24.43	£55.40	£508.19
St Albans	£3.64	£12.81	£3.89	£49.99	£5.75	£0.99	£2.90	£19.08	£149.04	n/a	£248.08
Potters Bar	£0.00	£1.42	£0.00	£0.00	£21.58	£0.00	£0.00	£0.00	£0.00	n/a	£23.00
Watford	£1.82	£2.85	£0.00	£5.81	£4.32	£0.00	£2.90	£4.49	£21.99	n/a	£44.17
Luton	£0.00	£1.42	£5.19	£4.65	£0.00	£0.00	£2.90	£21.33	£2.44	n/a	£37.93
London Colney	£0.00	£5.69	£1.30	£8.14	£15.83	£0.99	£2.90	£2.24	£17.10	n/a	£54.19
Stevenage	£23.65	£17.08	£44.09	£5.81	£5.75	£19.79	£260.88	£3.37	£4.89	n/a	£385.30
Other outflow	£10.92	£9.96	£22.04	£9.30	£47.48	£51.45	£5.80	£32.55	£24.43	n/a	£213.92
Other Sub-Total	£40.02	£51.23	£76.50	£83.70	£100.71	£73.21	£278.27	£83.06	£219.89	n/a	£1,006.60
TOTAL TURNOVER	£181.92	£142.31	£129.67	£116.25	£143.87	£98.93	£289.86	£112.24	£244.32	£55.40	£1,514.79

Table 7B: Comparison Shopping Penetration Rates and Available Expenditure 2024 (high growth)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expenditure
Expenditure 2024	£212.16	£165.97	£151.22	£135.57	£167.79	£115.38	£338.05	£130.90	£284.94	n/a	£1,701.98
Market Share											
Welwyn Garden City town centre	57%	22%	30%	13%	15%	19%	3%	21%	6%	10%	
Hatfield town centre	9%	27%	2%	7%	6%	2%	0%	1%	1%	0%	
Neighbourhood/Village Centres	1%	4%	3%	1%	2%	4%	0%	2%	2%	0%	
Hatfield Galleria	3%	5%	3%	3%	2%	0%	1%	2%	1%	40%	
Out-of-centre stores	8%	6%	3%	4%	5%	1%	0%	0%	0%	10%	
Welwyn Hatfield Sub-Total	78%	64%	41%	28%	30%	26%	4%	26%	10%	n/a	
St Albans	2%	9%	3%	43%	4%	1%	1%	17%	61%	n/a	
Potters Bar	0%	1%	0%	0%	15%	0%	0%	0%	0%	n/a	
Watford	1%	2%	0%	5%	3%	0%	1%	4%	9%	n/a	
Luton	0%	1%	4%	4%	0%	0%	1%	19%	1%	n/a	
London Colney	0%	4%	1%	7%	11%	1%	1%	2%	7%	n/a	
Stevenage	13%	12%	34%	5%	4%	20%	90%	3%	2%	n/a	
Other outflow	6%	7%	17%	8%	33%	52%	2%	29%	10%	n/a	
Other Sub-Total	22%	36%	59%	72%	70%	74%	96%	74%	90%	n/a	
TOTAL MARKET SHARE	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a	
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow Expend.	Total £M
Turnover £M											
Welwyn Garden City town centre	£120.93	£36.51	£45.37	£17.62	£25.17	£21.92	£10.14	£27.49	£17.10	£35.81	£358.06
Hatfield town centre	£19.09	£44.81	£3.02	£9.49	£10.07	£2.31	£0.00	£1.31	£2.85	£0.00	£92.95
Neighbourhood/Village Centres	£2.12	£6.64	£4.54	£1.36	£3.36	£4.62	£0.00	£2.62	£5.70	£0.00	£30.94
Hatfield Galleria	£6.36	£8.30	£4.54	£4.07	£3.36	£0.00	£3.38	£2.62	£2.85	£23.65	£59.12
Out-of-centre stores	£16.97	£9.96	£4.54	£5.42	£8.39	£1.15	£0.00	£0.00	£0.00	£5.16	£51.59
Welwyn Hatfield Sub-Total	£165.49	£106.22	£62.00	£37.96	£50.34	£30.00	£13.52	£34.03	£28.49	£64.61	£592.67
St Albans	£4.24	£14.94	£4.54	£58.29	£6.71	£1.15	£3.38	£22.25	£173.81	n/a	£289.32
Potters Bar	£0.00	£1.66	£0.00	£0.00	£25.17	£0.00	£0.00	£0.00	£0.00	n/a	£26.83
Watford	£2.12	£3.32	£0.00	£6.78	£5.03	£0.00	£3.38	£5.24	£25.64	n/a	£51.51
Luton	£0.00	£1.66	£6.05	£5.42	£0.00	£0.00	£3.38	£24.87	£2.85	n/a	£44.23
London Colney	£0.00	£6.64	£1.51	£9.49	£18.46	£1.15	£3.38	£2.62	£19.95	n/a	£63.20
Stevenage	£27.58	£19.92	£51.42	£6.78	£6.71	£23.08	£304.24	£3.93	£5.70	n/a	£449.35
Other outflow	£12.73	£11.62	£25.71	£10.85	£55.37	£60.00	£6.76	£37.96	£28.49	n/a	£249.48
Other Sub-Total	£46.68	£59.75	£89.22	£97.61	£117.45	£85.38	£324.52	£96.86	£256.44	n/a	£1,173.92
TOTAL TURNOVER	£212.16	£165.97	£151.22	£135.57	£167.79	£115.38	£338.05	£130.90	£284.94	£64.61	£1,766.59

Table 8A: Comparison Shopping Penetration Rates and Available Expenditure 2028 (baseline growth)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expenditure
Expenditure 2028	£214.10	£167.48	£152.38	£133.20	£171.67	£118.25	£343.22	£128.61	£279.95	n/a	£1,708.85
Market Share											
Welwyn Garden City town centre	57%	22%	30%	13%	15%	19%	3%	21%	6%	10%	
Hatfield town centre	9%	27%	2%	7%	6%	2%	0%	1%	1%	0%	
Neighbourhood/Village Centres	1%	4%	3%	1%	2%	4%	0%	2%	2%	0%	
Hatfield Galleria	3%	5%	3%	3%	2%	0%	1%	2%	1%	40%	
Out-of-centre stores	8%	6%	3%	4%	5%	1%	0%	0%	0%	10%	
Welwyn Hatfield Sub-Total	78%	64%	41%	28%	30%	26%	4%	26%	10%	n/a	
St Albans	2%	9%	3%	43%	4%	1%	1%	17%	61%	n/a	
Potters Bar	0%	1%	0%	0%	15%	0%	0%	0%	0%	n/a	
Watford	1%	2%	0%	5%	3%	0%	1%	4%	9%	n/a	
Luton	0%	1%	4%	4%	0%	0%	1%	19%	1%	n/a	
London Colney	0%	4%	1%	7%	11%	1%	1%	2%	7%	n/a	
Stevenage	13%	12%	34%	5%	4%	20%	90%	3%	2%	n/a	
Other outflow	6%	7%	17%	8%	33%	52%	2%	29%	10%	n/a	
Other Sub-Total	22%	36%	59%	72%	70%	74%	96%	74%	90%	n/a	
TOTAL MARKET SHARE	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a	
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow Expend.	Total £M
Turnover £M											
Welwyn Garden City town centre	£122.04	£36.85	£45.71	£17.32	£25.75	£22.47	£10.30	£27.01	£16.80	£36.03	£360.26
Hatfield town centre	£19.27	£45.22	£3.05	£9.32	£10.30	£2.36	£0.00	£1.29	£2.80	£0.00	£93.61
Neighbourhood/Village Centres	£2.14	£6.70	£4.57	£1.33	£3.43	£4.73	£0.00	£2.57	£5.60	£0.00	£31.08
Hatfield Galleria	£6.42	£8.37	£4.57	£4.00	£3.43	£0.00	£3.43	£2.57	£2.80	£23.73	£59.34
Out-of-centre stores	£17.13	£10.05	£4.57	£5.33	£8.58	£1.18	£0.00	£0.00	£0.00	£5.20	£52.05
Welwyn Hatfield Sub-Total	£167.00	£107.19	£62.48	£37.30	£51.50	£30.74	£13.73	£33.44	£28.00	£64.96	£596.33
St Albans	£4.28	£15.07	£4.57	£57.28	£6.87	£1.18	£3.43	£21.86	£170.77	n/a	£285.32
Potters Bar	£0.00	£1.67	£0.00	£0.00	£25.75	£0.00	£0.00	£0.00	£0.00	n/a	£27.43
Watford	£2.14	£3.35	£0.00	£6.66	£5.15	£0.00	£3.43	£5.14	£25.20	n/a	£51.07
Luton	£0.00	£1.67	£6.10	£5.33	£0.00	£0.00	£3.43	£24.44	£2.80	n/a	£43.77
London Colney	£0.00	£6.70	£1.52	£9.32	£18.88	£1.18	£3.43	£2.57	£19.60	n/a	£63.21
Stevenage	£27.83	£20.10	£51.81	£6.66	£6.87	£23.65	£308.89	£3.86	£5.60	n/a	£455.27
Other outflow	£12.85	£11.72	£25.90	£10.66	£56.65	£61.49	£6.86	£37.30	£28.00	n/a	£251.43
Other Sub-Total	£47.10	£60.29	£89.90	£95.90	£120.17	£87.50	£329.49	£95.17	£251.96	n/a	£1,177.49
TOTAL TURNOVER	£214.10	£167.48	£152.38	£133.20	£171.67	£118.25	£343.22	£128.61	£279.95	£64.96	£1,773.82

Table 8B: Comparison Shopping Penetration Rates and Available Expenditure 2028 (high growth)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expenditure
Expenditure 2028	£267.76	£209.46	£190.58	£166.59	£214.70	£147.89	£429.25	£160.85	£350.13	n/a	£2,137.20
Market Share											
Welwyn Garden City town centre	57%	22%	30%	13%	15%	19%	3%	21%	6%	10%	
Hatfield town centre	9%	27%	2%	7%	6%	2%	0%	1%	1%	0%	
Neighbourhood/Village Centres	1%	4%	3%	1%	2%	4%	0%	2%	2%	0%	
Hatfield Galleria	3%	5%	3%	3%	2%	0%	1%	2%	1%	40%	
Out-of-centre stores	8%	6%	3%	4%	5%	1%	0%	0%	0%	10%	
Welwyn Hatfield Sub-Total	78%	64%	41%	28%	30%	26%	4%	26%	10%	n/a	
St Albans	2%	9%	3%	43%	4%	1%	1%	17%	61%	n/a	
Potters Bar	0%	1%	0%	0%	15%	0%	0%	0%	0%	n/a	
Watford	1%	2%	0%	5%	3%	0%	1%	4%	9%	n/a	
Luton	0%	1%	4%	4%	0%	0%	1%	19%	1%	n/a	
London Colney	0%	4%	1%	7%	11%	1%	1%	2%	7%	n/a	
Stevenage	13%	12%	34%	5%	4%	20%	90%	3%	2%	n/a	
Other outflow	6%	7%	17%	8%	33%	52%	2%	29%	10%	n/a	
Other Sub-Total	22%	36%	59%	72%	70%	74%	96%	74%	90%	n/a	
TOTAL MARKET SHARE	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a	
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow Expend.	Total £M
Turnover £M											
Welwyn Garden City town centre	£152.62	£46.08	£57.17	£21.66	£32.21	£28.10	£12.88	£33.78	£21.01	£45.06	£450.56
Hatfield town centre	£24.10	£56.56	£3.81	£11.66	£12.88	£2.96	£0.00	£1.61	£3.50	£0.00	£117.08
Neighbourhood/Village Centres	£2.68	£8.38	£5.72	£1.67	£4.29	£5.92	£0.00	£3.22	£7.00	£0.00	£38.87
Hatfield Galleria	£8.03	£10.47	£5.72	£5.00	£4.29	£0.00	£4.29	£3.22	£3.50	£29.68	£74.21
Out-of-centre stores	£21.42	£12.57	£5.72	£6.66	£10.74	£1.48	£0.00	£0.00	£0.00	£6.51	£65.09
Welwyn Hatfield Sub-Total	£208.85	£134.06	£78.14	£46.64	£64.41	£38.45	£17.17	£41.82	£35.01	£81.25	£745.80
St Albans	£5.36	£18.85	£5.72	£71.63	£8.59	£1.48	£4.29	£27.34	£213.58	n/a	£356.84
Potters Bar	£0.00	£2.09	£0.00	£0.00	£32.21	£0.00	£0.00	£0.00	£0.00	n/a	£34.30
Watford	£2.68	£4.19	£0.00	£8.33	£6.44	£0.00	£4.29	£6.43	£31.51	n/a	£63.87
Luton	£0.00	£2.09	£7.62	£6.66	£0.00	£0.00	£4.29	£30.56	£3.50	n/a	£54.74
London Colney	£0.00	£8.38	£1.91	£11.66	£23.62	£1.48	£4.29	£3.22	£24.51	n/a	£79.06
Stevenage	£34.81	£25.14	£64.80	£8.33	£8.59	£29.58	£386.32	£4.83	£7.00	n/a	£569.39
Other outflow	£16.07	£14.66	£32.40	£13.33	£70.85	£76.90	£8.58	£46.65	£35.01	n/a	£314.45
Other Sub-Total	£58.91	£75.41	£112.44	£119.94	£150.29	£109.44	£412.08	£119.03	£315.11	n/a	£1,472.64
TOTAL TURNOVER	£267.76	£209.46	£190.58	£166.59	£214.70	£147.89	£429.25	£160.85	£350.13	£81.25	£2,218.44

Table 9A: Summary of Comparison Expenditure/Floorspace Projections (baseline growth)

Centre	2011	2014	2019	2024	2029
Available Expenditure					
Welwyn Garden City town centre	£231.30	£241.76	£261.86	£307.02	£360.26
Hatfield town centre	£42.17	£44.05	£67.91	£79.71	£93.61
Neighbourhood/Village Centres	£18.69	£19.53	£22.67	£26.53	£31.08
Hatfield Galleria	£39.11	£40.83	£43.33	£50.69	£59.34
Out-of-centre stores	£34.52	£36.10	£37.63	£44.24	£52.05
Total	£365.79	£382.28	£433.40	£508.19	£596.33
Benchmark Turnover of Existing Floorspace					
Welwyn Garden City town centre	£231.30	£235.23	£255.92	£278.42	£302.91
Hatfield town centre	£42.17	£59.69	£80.37	£87.43	£95.12
Neighbourhood/Village Centres	£18.69	£19.01	£20.68	£22.50	£24.47
Hatfield Galleria	£39.11	£39.78	£43.28	£47.08	£51.22
Out-of-centre stores	£34.52	£35.10	£38.19	£41.55	£45.20
Total	£365.79	£388.81	£438.43	£476.98	£518.93
Surplus Expenditure					
Welwyn Garden City town centre	n/a	£6.53	£5.94	£28.60	£57.35
Hatfield town centre	n/a	-£15.64	-£12.46	-£7.73	-£1.51
Neighbourhood/Village Centres	n/a	£0.52	£1.99	£4.03	£6.60
Hatfield Galleria	n/a	£1.05	£0.05	£3.61	£8.11
Out-of-centre stores	n/a	£1.00	-£0.56	£2.69	£6.85
Total	n/a	-£6.53	-£5.03	£31.21	£77.40
Sales Density for New Floorspace					
Welwyn Garden City town centre	£5,200	£5,288	£5,753	£6,259	£6,810
Hatfield town centre	£5,200	£5,470	£5,951	£6,474	£7,043
Neighbourhood/Village Centres	£4,200	£4,418	£4,806	£5,229	£5,689
Hatfield Galleria	£3,600	£3,787	£4,120	£4,482	£4,876
Out-of-centre stores	£3,100	£3,153	£3,430	£3,732	£4,060
Sales Floorspace (Sq M Net)					
Welwyn Garden City town centre	n/a	1,234	1,032	4,570	8,422
Hatfield town centre	n/a	-2,859	-2,094	-1,194	-214
Neighbourhood/Village Centres	n/a	119	415	772	1,161
Hatfield Galleria	n/a	278	13	805	1,664
Out-of-centre stores	n/a	318	-163	721	1,686
Total	n/a	-910	-796	5,674	12,718
Gross Floorspace (Sq M Gross)					
Welwyn Garden City town centre	n/a	1,646	1,376	6,093	11,229
Hatfield town centre	n/a	-3,812	-2,791	-1,591	-286
Neighbourhood/Village Centres	n/a	158	553	1,029	1,548
Hatfield Galleria	n/a	371	18	1,073	2,218
Out-of-centre stores	n/a	374	-191	849	1,984
Total	n/a	-1,263	-1,035	7,452	16,693

Table 9B: Summary of Comparison Expenditure/Floorspace Projections (high growth)

Centre	2011	2014	2019	2024	2029
Available Expenditure					
Welwyn Garden City town centre	£231.30	£245.16	£284.77	£358.06	£450.56
Hatfield town centre	£42.17	£44.67	£73.85	£92.95	£117.08
Neighbourhood/Village Centres	£18.69	£19.80	£24.66	£30.94	£38.87
Hatfield Galleria	£39.11	£41.41	£47.12	£59.12	£74.21
Out-of-centre stores	£34.52	£36.61	£40.92	£51.59	£65.09
Total	£365.79	£387.66	£471.32	£592.67	£745.80
Benchmark Turnover of Existing Floorspace					
Welwyn Garden City town centre	£231.30	£235.23	£255.92	£278.42	£302.91
Hatfield town centre	£42.17	£59.69	£80.37	£87.43	£95.12
Neighbourhood/Village Centres	£18.69	£19.01	£20.68	£22.50	£24.47
Hatfield Galleria	£39.11	£39.78	£43.28	£47.08	£51.22
Out-of-centre stores	£34.52	£35.10	£38.19	£41.55	£45.20
Total	£365.79	£388.81	£438.43	£476.98	£518.93
Surplus Expenditure					
Welwyn Garden City town centre	n/a	£9.93	£28.85	£79.64	£147.65
Hatfield town centre	n/a	-£15.02	-£6.52	£5.52	£21.96
Neighbourhood/Village Centres	n/a	£0.80	£3.98	£8.44	£14.39
Hatfield Galleria	n/a	£1.63	£3.85	£12.03	£22.99
Out-of-centre stores	n/a	£1.51	£2.74	£10.05	£19.89
Total	n/a	-£1.15	£32.89	£115.69	£226.88
Sales Density for New Floorspace					
Welwyn Garden City town centre	£5,200	£5,288	£5,753	£6,259	£6,810
Hatfield town centre	£5,200	£5,288	£5,753	£6,259	£6,810
Neighbourhood/Village Centres	£4,200	£4,271	£4,647	£5,056	£5,500
Hatfield Galleria	£3,600	£3,661	£3,983	£4,333	£4,715
Out-of-centre stores	£3,100	£3,153	£3,430	£3,732	£4,060
Sales Floorspace (Sq M Net)					
Welwyn Garden City town centre	n/a	1,878	5,014	12,723	21,682
Hatfield town centre	n/a	-2,840	-1,133	882	3,224
Neighbourhood/Village Centres	n/a	187	856	1,670	2,617
Hatfield Galleria	n/a	445	966	2,777	4,876
Out-of-centre stores	n/a	479	797	2,692	4,900
Total	n/a	149	6,501	20,745	37,298
Gross Floorspace (Sq M Gross)					
Welwyn Garden City town centre	n/a	2,504	6,686	16,964	28,910
Hatfield town centre	n/a	-3,786	-1,510	1,176	4,299
Neighbourhood/Village Centres	n/a	249	1,141	2,227	3,489
Hatfield Galleria	n/a	593	1,287	3,703	6,501
Out-of-centre stores	n/a	564	938	3,167	5,764
Total	n/a	123	8,543	27,237	48,962