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Planning Design Economics

Retail Needs Assessment Update 2010

Welwyn Hatfield Borough Council

November 2010

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Contents

1.0 Introduction

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:

- an audit of the existing retail facilities within the Borough; and
- a quantitative assessment of the need for new retail facilities within the Welwyn Hatfield Borough up to 2021.

1.2 This report provides an update of the retail capacity assessment based on the latest available information, e.g. population, expenditure and turnover levels. This update report should be read alongside the 2007 retail study.

1.3 Section 2 of this report summarises recent relevant changes to the retail capacity assessment and outlines retail trends. Section 3 sets out the updated retail capacity assessment. Section 4 provides the recommendations and conclusions.

2.0 # Recent Changes and Trends

The Need for the Study Update

2.1 The Council's previous retail study (2007) provided projections up to 2021 and these figures now need to be updated and rolled forward. The aim of this report is to provide projections for the period up to 2021 and then 2026. The 2007 study did not foresee the current economic recession and the expenditure growth projections adopted in 2007 may no longer be robust.

2.2 Central government guidance in PPS6 has been replaced by PPS4 and this will have implications for plan making and development control decisions.

PPS4 'Planning for Sustainable Growth' (2009)

2.3 The 2005 study was based on the guidance set out in PPS6: Planning for Town Centres published in March 2005. This guidance has now been superseded by PPS4 'Planning for Sustainable Growth'. The publication of this document follows the Department of Communities and Local Government publication of a Consultation Document on proposed changes to PPS6 Planning for Town Centres on 10 July 2008 and the publication a further consultation paper on a new PPS4: Planning for Prosperous Economies on 5 May 2009.

2.4 PPS4 was published by the Department for Communities and Local Government on 29 December 2009. It sets out the Government's policies for economic development, and replaces PPG4, PPG5, PPS6 and parts of PPS7 and PPG13. As such it provides a more succinct statement of economic development policy including town centre and retail policy, in both urban and rural areas. Additional good practice guidance on need, impact and the sequential approach for retail and town centre uses is provided in the accompanying Practice Guide.

2.5 PPS4 places retail and town centre development in a wider context as *"economic development"* that contributes to the Government's overarching objective of "*sustainable economic growth*".

Key Changes

2.6 PPS4:

- removes the 'need' test for the determination of planning applications. In future applications will be determined on the basis of compliance with the sequential approach and a revised 'impact' assessment, some of which will apply to all forms of economic development, whilst others will be specific to town centre and retail uses; and

- excludes any specific proposals for a 'competition test'. The Government response to the final Competition Commission recommendations will be issued separately.

2.7 There are a number of changes in the wording of policies which clarify the Government's approach and support for town centres, as summarised below.

Plan Making Policies

2.8 As in PPS6 there is considerable emphasis on the plan led approach and the need to base regional and local policies on a robust evidence base. PPS4 clearly sets out what is required of planning authorities.

2.9 The 'need' assessment remains part of the required inputs for plan making, and specifically qualitative need requires a consideration of the provision and distribution of services, and whether there is a need to increase competition and retail mix. Local planning authorities are required to:

1. identify deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day needs;
2. give additional weight to qualitative deficiencies in deprived areas. This could include promoting centres to a higher level of the retail hierarchy or designating new centres, where appropriate. However, the needs of deprived areas should only be given preference when considered against alternative sites with similar location characteristics, and any benefits in respect of regeneration or employment, should only be material considerations in the site selection process;
3. set flexible policies for their centres to respond to changing economic circumstances;
4. encourage residential or office uses above ground floor town centre uses within centres, ensuring housing in out-of-centre developments is not, in itself, used to justify additional floorspace in such locations;
5. consider setting thresholds for the scale of edge-of-centre and out-of-centre development which should be the subject of an impact assessment and specify the areas where this will apply;
6. plan to promote competitive town centres and provide consumer choice and ensure a diverse range of uses are provided throughout a centre;
7. ensure that the scale of any sites identified for development and the level of travel they generate, is in keeping with the role and function of that centre;
8. support shops and services in local centres and villages; and
9. identify sites in, or failing that, on the edge-of-centre, capable of accommodating larger format developments where there is a need for such development.

Development Management Policies

2.10 Applications for retail and town centre uses will be assessed against PPS4 policies and the key sequential and impact tests. The latter will consist of two sets of assessments, one applying to all forms of economic development, and the other specifically applying to town centre uses. The policy also allows for local authorities to define any locally important impacts on centres which should be tested.

2.11 The requirement is to focus on the impacts during the first five years after implementation of a proposal. This includes consideration of the cumulative impact of the development with recent permissions and developments. PPS4 also requires the assessment to be proportionate to the scale of development proposed and encourages local planning authorities to discuss and agree the type and level of information required within an impact assessment before submission.

2.12 In terms of the sequential approach, the policy requirements are largely unchanged, with sites required to be assessed for their availability, suitability and viability. However PPS4 makes it clear that where an applicant has not demonstrated compliance with the sequential approach, then planning applications for main town centre uses that are not in an existing centre and not in accordance with an up to date development plan, should be refused.

2.13 Similarly if a proposal is likely to lead to a significant adverse impact, whether on its own or cumulatively, it should also be refused. Where there is no significant adverse impact the local planning authority is required to determine an application taking account of the positive and negative impacts of the proposal and any other material considerations.

The Economic Downturn

2.14 The economic downturn is having a significant impact on the retail and leisure sectors. A number of national operators have failed, leaving major voids within centres and retail parks (e.g. Woolworths, MFI, Land of Leather, Borders and Zavvi). Many town centre development schemes have been delayed and the demand for traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth.

2.15 The most recent Government expenditure data available (2009) only partially reflects this downturn. Projecting expenditure levels within this study update does not assume a continuation of recent past trends (i.e. significant expenditure growth), particularly in the short term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the LDF period. This study takes a long term view for the LDF period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency will also need to be carefully considered. We believe the study should take a balanced approach.

Retail Trends

2.16 A revised assessment of the need for retail facilities in Welwyn Hatfield Borough is set out in Section 3.0 of this report. This section provides an overview of national tends within the retail sector.

Expenditure Growth

2.17 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However, the current economic downturn is expected to lead to limited growth in the short term.

2.18 In the past expenditure growth has fuelled the growth in retail floorspace, including major out-of-centre development particularly in the 1980s and 1990s. The economic downturn suggests that recent rates of growth during the past few years are unlikely to be achieved in the short term, but the underlying trend over the medium and long terms is expected to lead to a need for further retail floorspace. We anticipate these national trends will be mirrored in Welwyn Hatfield.

New Forms of Retailing

2.19 New forms of retailing have emerged in recent years as an alternative to more traditional shopping facilities. Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. Trends within this sector may well have implications for retailing within Welwyn Hatfield. Trends within this sector will have implications for retailing. It will be necessary to carefully monitor the growth within this sector particularly in the long term and the effect that it may have on diverting expenditure that might otherwise be spent in shops.

2.20 On-line shopping has experienced rapid growth but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector, but Experian's projections suggest this growth will level off by 2016.

2.21 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

2.22 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers also responded to stricter planning controls by changing their trading formats. Some major food operators have introduced smaller store formats capable of being accommodated within town centres, such as the Tesco Metro, Sainsbury Central/Local store and Marks and Spencer's Simply Foods formats. Food operators have also entered the local convenience store market, for example Tesco Express store and convenience stores linked with petrol filling stations. The entrance of European discount food operators such as Aldi and Lidl has also been rapid.

2.23 Food store operators have also implemented a programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have attempted to increase the sale of non-food products within their food stores, including clothing and electrical goods.

2.24 Comparison retailers have also responded to recent market conditions. The bulky goods retail warehouse sector has rationalised and there have been a number of mergers. For example there are fewer DIY operators, following the acquisition of Do It All, Great Mills and Wickes by Focus DIY. B&Q and Homebase developed very large 'category killer' retail warehouses (some exceeding 10,000 sq m gross), but more recently have scaled down or closed their stores. This may be due to the current downturn in the housing market, which has been historically linked to the success of DIY store operators.

2.25 Other traditional high street retailers have sought out-of-centre stores, for example Boots, Next, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the country. Sports clothing retail warehouses including JJB Sports and Decathlon have also expanded out-of-centre. Asda have opened comparison only Asda Living stores on retail parks.

2.26 The economic downturn has had, and is likely to continue to have, an impact on the retail sector, e.g. Woolworth, Borders and MFI are notable victims. The effects of the recession may have an impact on shop vacancy levels in the Borough. The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods are particularly weak at present.

2.27 Within town centres, some high street multiple comparison retailers changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq m/2,150 sq ft) with an increasing polarisation of activity into the larger regional and sub-regional centres. Operator demand for space has decreased significantly during the recession in most centres, and of those national multiples looking for space many prefer to locate in larger centres.

3.0 Quantitative Scope for Retail Floorspace

Introduction

3.1 This section assesses the quantitative scope for new retail floorspace in Welwyn Hatfield Borough up to 2026. It sets outs the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping.

3.2 All monetary values expressed in this analysis are at 2009 prices unless stated otherwise. The previous 2007 NLP study was based on 2005 prices, therefore the expenditure and turnover figures in this report are not directly comparable with the figures in the 2007 study.

3.3 The 2007 study provided projections from 2007 to 2011, 2016 and 2021. The projections in this report have been rolled forward and figures are provided for 2013, 2016, 2021 and 2026.

Methodology and Data

3.4 The quantitative analysis is based on the study area defined in the 2007 NLP Study. The study area has been divided into none zones for more detailed analysis. The study area used within this update replicates the area adopted in the 2007 Study.

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

3.6 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 latest local consumer expenditure estimates for comparison and convenience goods for the study area zones have been obtained.

3.7 Experian Business Strategies (EBS) national expenditure information has been used to forecast expenditure within the study area in the short term (2009 to 2012). These forecasts show more limited growth due to the effects of the recession. Experian's projections are based on an economic 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 disaggregated consumer spending volumes, prices and values. The model incorporates assumptions about income and price elasticities.

3.8 For longer term projections Experian's ultra long term growth rate has been adopted (i.e. 0.5% for convenience goods and 4.7% for comparison) to project between 2012 to 2016 and beyond. We believe the Experian lower EBS growth rates reflect the current economic downturn and provide an appropriate growth rate for the shorter term. In the longer term it is more difficult to forecast year on year changes in expenditure, and in our view, past trend line growth rates provide the most appropriate average growth rate and the potential post recession recovery.

3.9 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.

3.10 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

3.11 The study area population for 2001 to 2026 is set out in Table 2 in Appendix 2, based on Chelmer East of England Population Projections Scenario 2 December 2009.

3.12 The levels of available spending are derived by combining the population in Table 2 and per capita spending figures in Table 3. For both convenience and comparison spending, a reduction has been made for special forms of trading such as mail order, e-tail (non-retail businesses) and vending machines.

3.13 Table 3 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2026. Comparison forecasts of per capita spending are shown in Table 3 in Appendix 3.

3.14 Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and E-tailing. This Experian information suggests that non-store retail sales in 2009 is:

- 6.4% of convenience goods expenditure; and
- 10.0% of comparison goods expenditure.

3.15 Experian predicts that these figures will increase in the future. Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace.

3.16 As a consequence of growth in population and per capita spending, convenience goods spending of residents within the study area is forecast to increase by 12% from £628.62 million in 2010 to £704.68 million in 2026, as shown in Table 4 in Appendix 2.

3.17 Comparison goods spending is forecast to more than double between 2010 and 2026, increasing from £978.65 million to £2,015.41 million, as shown in Table 4 in Appendix 3. This growth is dependent on a return to previous growth trends (i.e. an average growth of 4.7% per annum) after 2011. These figures relate to real growth and exclude inflation.

Existing Retail Floorspace

3.18 Convenience goods retail sales floorspace within Welwyn Hatfield Borough is 22,735 sq m net as set out in Table 1 in Appendix 2. This floorspace figure excludes comparison sales floorspace within food stores (6,069 sq m net).

3.19 Comparison goods retail sales floorspace within Welwyn Hatfield Borough is estimated as 78,444 sq m net as shown in Table 1 in Appendix 3, which includes comparison sales within food stores.

Existing Spending Patterns 2010

Convenience Shopping

3.20 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 2, with NLP adjustments to reflect changes since 2007.

3.21 Table 6 indicates that the level of convenience goods expenditure attracted to shops/stores in Welwyn Hatfield Borough in 2010 is estimated to be £208.33 million as shown in Appendix 2. Welwyn Hatfield Borough's market share of total convenience expenditure in the study area as a whole is estimated to be about 33% (£208.33 million of £628.62 million). However expenditure retention in the core zones (1 and 2) is relatively high, at 97% and 88% respectively.

3.22 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 2, 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.

3.23 Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 1 in Appendix 2, for consistency with the use of goods based expenditure figures.

3.24 Average sales densities are not widely available for small convenience shops, particularly independent retailers. An average sales density of £4,000 per sq m has been adopted for small convenience shops in the Borough. The total benchmark turnover of existing convenience sales floorspace within Welwyn Hatfield Borough is £227.08 million at 2010.

3.25 The assessment of shopping patterns suggests that convenience goods expenditure available to facilities in Welwyn Hatfield Borough in 2010 is £208.33 million. These figures suggest that collectively convenience retail facilities in Welwyn Hatfield Borough are trading slightly below average. These figures take into account the now under construction redevelopment/expansion of the Sainsbury's store in Welwyn Garden City.

3.26 By way of comparison, the 2011 projected available expenditure within the 2005 NLP study was about £195 million at 2005 prices. The difference (£208.33 million rather than £195 million) is predominantly explained by inflation and the price bases adopted (2005 and 2009 prices).

Comparison Shopping

3.27 The estimated comparison goods expenditure available to facilities within Welwyn Hatfield is £349.09 million in 2010, as shown in Table 5 in Appendix 3. This is expected to increase to £704.01 million in 2026.

3.28 Welwyn Hatfield Borough's market share of total comparison goods expenditure generated within the study area is 35.7%. This market share reflects the significant outflow of comparison expenditure and the retail hierarchy and the catchment areas of competing centres, e.g. Stevenage.

3.29 As indicated the current level of comparison expenditure attracted to facilities in Welwyn Hatfield Borough is £349.09 million. Based on this expenditure estimate, the average sales density for existing comparison sales floorspace (78,444 sq m net) is £4,450 per sq m net. Mintel's Retail Rankings 2010 provides company average sales density information for a selection of national retailers. This data suggests a notional average sales density for national comparison retailers of just over £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. The analysis of existing comparison shopping patterns in 2010 suggests the following average sales density figures for each town.

Table 3.1: Defined Centres Average Sales Densities

Town	Average Sales Density 2010 £ per sq m net
Welwyn Garden City town centre	£5,557
Hatfield town centre	£7,148
Neighbourhood/village centres	£3,390
Hatfield Galleria	£2,675
Out-of-centre stores	£2,374
Welwyn Hatfield Borough Average	**£4,450**

3.30 Table 3.1 indicates that trading densities amongst comparison facilities in the Borough vary significantly, but the average sales density figures should be viewed in the context of the type of floorspace. Comparison sales floorspace in Hatfield is trading at a higher sales density because the average includes comparison sales floorspace within the Asda store, which accounts for a significant proportion (29%) of all comparison sales floorspace in the town centre. Neighbourhood centres have a lower sales density, because sales floorspace is predominantly small independent shops. Out of centre stores trade at the lowest density. Retail warehouses on average trade at a lower density than high street shops.

3.31 Comparison shopping facilities within Welwyn Hatfield Borough appear to be trading satisfactorily, but there is no evidence of over-trading in 2010.

Quantitative Capacity for Convenience Floorspace

3.32 The level of available convenience goods expenditure in 2013, 2016, 2021 and 2026 is shown at Tables 7 to 10 in Appendix 2.

3.33 The total level of convenience goods expenditure available for shops in Welwyn Hatfield Borough between 2010 and 2026 is summarised in Table 11 in Appendix 2. This table takes into account the population and expenditure projections shown in Table 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 2.

3.34 Convenience expenditure attracted to shopping facilities in Welwyn Hatfield Borough is expected to increase from £208.33 million in 2010 to £215.05 million in 2016, and to £234.69 million in 2026.

3.35 The floorspace projections in Table 11 are based on constant markets shares, which is considered appropriate for plan making and allocation purposes. However, if food store proposals emerge it will be necessary to consider how these may affect shopping patterns and expenditure retention, and whether the proposal would have an adverse impact on town centres. Table 11 assumes that the benchmark turnover of convenience floorspace will not increase through growth in turnover efficiency.

3.36 Within the Borough, future expenditure growth will reduce the expenditure deficit from -£18.76 million in 2010 to -12.04 million in 2016. A small deficit is envisaged in 2021 (-£2.75 million) increasing to a surplus of +£7.60 million in 2026. As indicated earlier these figures take into account the expanded Sainsbury’s store in Welwyn town centre.

3.37 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 £11,000 per sq m net for large food store floorspace and £4,000 per sq m net for local shops.

Quantitative Capacity for Comparison Floorspace

3.38 Available comparison goods expenditure has been projected forward to 2013, 2016, 2021 and 2026 in Tables 6 to 9 in Appendix 3, and summarised in Table 10. Available comparison expenditure is expected to increase from £349.09 million in 2010 to £424.82 million in 2016 and to £704.01 million in 2026.

3.39 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 Table 10. Table 10 assumes that the existing turnover of comparison floorspace will not increase between 2010 and 2012 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 2% per annum is adopted, which we believe is realistic if an expenditure growth rate of 4.7% per annum is achieved. 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.

3.40 Population and expenditure growth will result in a comparison expenditure surplus at 2016 of +£15.28 million increasing to +£204.79 million in 2026. Surplus comparison expenditure has been converted into comparison floorspace projections at the foot of Table 10 in Appendix 3. These figures take into account retail development proposals in Hatfield town centre. Surplus expenditure at 2016 could support 3,246 sq m net of sales floorspace (4,279 sq m gross), or 34,665 sq m net (45,528 sq m gross) by 2026, as shown in Table 10.

4.0 Conclusions and Recommendations

4.1 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 2013, 2016, 2021 and 2026. The principal conclusions of the analysis contained within this study are summarised below.

Changes Since 2007

4.2 Expenditure projections for convenience goods within the 2007 Study remain broadly unchanged despite the effects of the recession. Allowing for the expanded Sainsbury store in Welwyn town centre, there remains a projected convenience expenditure deficit up and beyond 2016.

4.3 Expenditure for comparison goods is much lower than previously projected due to the effects of the recession and deflation. Comparison floorspace projections to 2016 are now lower (3,246 sq m net compared with 11,655 sq m net). This decrease is due to lower forecast growth in expenditure per capita.

Meeting Shopping Needs in the Borough

4.4 Future planning policy and site allocations should seek, in line with PPS4, to identify opportunities to accommodate growth, within 5 year periods.

4.5 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 need and impact assessment on the approach adopted in this study, updated as necessary.

4.6 Meeting the projections between 2010 and 2016 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.

4.7 Floorspace projections should not inhibit competition between retailers when located within centres, subject to the consideration of scale and impact. However, if an out-of-centre proposal exceeds the floorspace projections then the impact of the proposal will need to be carefully considered.

4.8 Long term forecasts up to 2021 and 2026 may be more susceptible to change, due to unforeseen circumstances. Projected surplus expenditure beyond 2016 is attributable to projected growth in spending per capita, extrapolated from past growth projections. 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

4.9 On the basis of the assumption that existing convenience retailers trade at national average turnover levels, the global quantitative capacity analysis indicates there is limited need for further convenience goods floorspace within the Borough for the foreseeable future up to 2021. There is no need to identify additional sites for food store development in the LDF.

Comparison Goods Development

4.10 The strategy should seek to concentrate further comparison retail development within the two main town centres (Welwyn Garden City and Hatfield), as the main comparison shopping destinations in the Borough. The strategy should seek to maintain these town centres's position in the shopping hierarchy and as a minimum maintain the centre's existing market share of expenditure. In order to maintain their existing position it will be necessary to continue to improve comparison shopping facilities in the longer term. Comparison retail development within town and district centres should be consistent in terms of scale and nature of the centre.

4.11 The quantitative capacity analysis indicates that in the short to medium term up to 2016 there could be scope for about 4,400 sq m gross of comparison floorspace in the Borough as a whole, over and above development proposals in Hatfield town centres.

4.12 The priorities for comparison development should be the implementation of the Hatfield town centre development and additional development in Welwyn town centre (about 4,400 sq m gross).

4.13 Any major comparison retail proposals outside the two 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 within centres 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.

Scale of Development

4.14 Large-scale development which serves a significant part of the Borough should be concentrated within the two main town centres. Neighbourhood/village centres should complement the two town centres by providing for day to day shopping facilities and other services e.g. top-up shopping.

4.15 PPS4 suggests the impact of retail developments of 2,500 sq m gross or above may need to be considered. Based on the scale and role of centres within Welwyn Hatfield Borough and the retail floorspace projections within this report, we believe the impact of smaller development proposals could raise concerns. A development of 2,500 sq m gross would account for a significant proportion of the projected need for comparison retail floorspace up to 2016, and there is a deficit of convenience goods expenditure. There is no quantitative need for convenience goods floorspace. These projections suggest that retail developments under 2,500 sq m gross could have a significant impact on town centres in Welwyn Hatfield Borough, and the PPS4 threshold is not appropriate for the local circumstances.

4.16 The sequential approach indicates that town, district and local centres are the preferred location for new retail development. Some forms of development may be more appropriate in smaller centres, if there are localised areas of deficiency. The key issues are the nature and scale of development proposed and the catchment area the development seeks to serve.

4.17 In general development within the village and local centres should primarily serve the village/settlement within which it is located, and perhaps smaller nearby settlements which do not have a centre. Local centres within the urban area should primarily serve walk-in catchment areas.

4.18 We believe the impact of all out-of-centre retail applications of over 1,000 sq m gross should be assessed. In neighbourhood and village centres the scale of retail development should generally not exceed 500 sq m gross.

Future Strategy Monitoring

4.19 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail development up to 2016, with longer term forecasts up to 2021 and 2026.

4.20 We recommend that this retail capacity study should be updated again in 3-4 years time and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

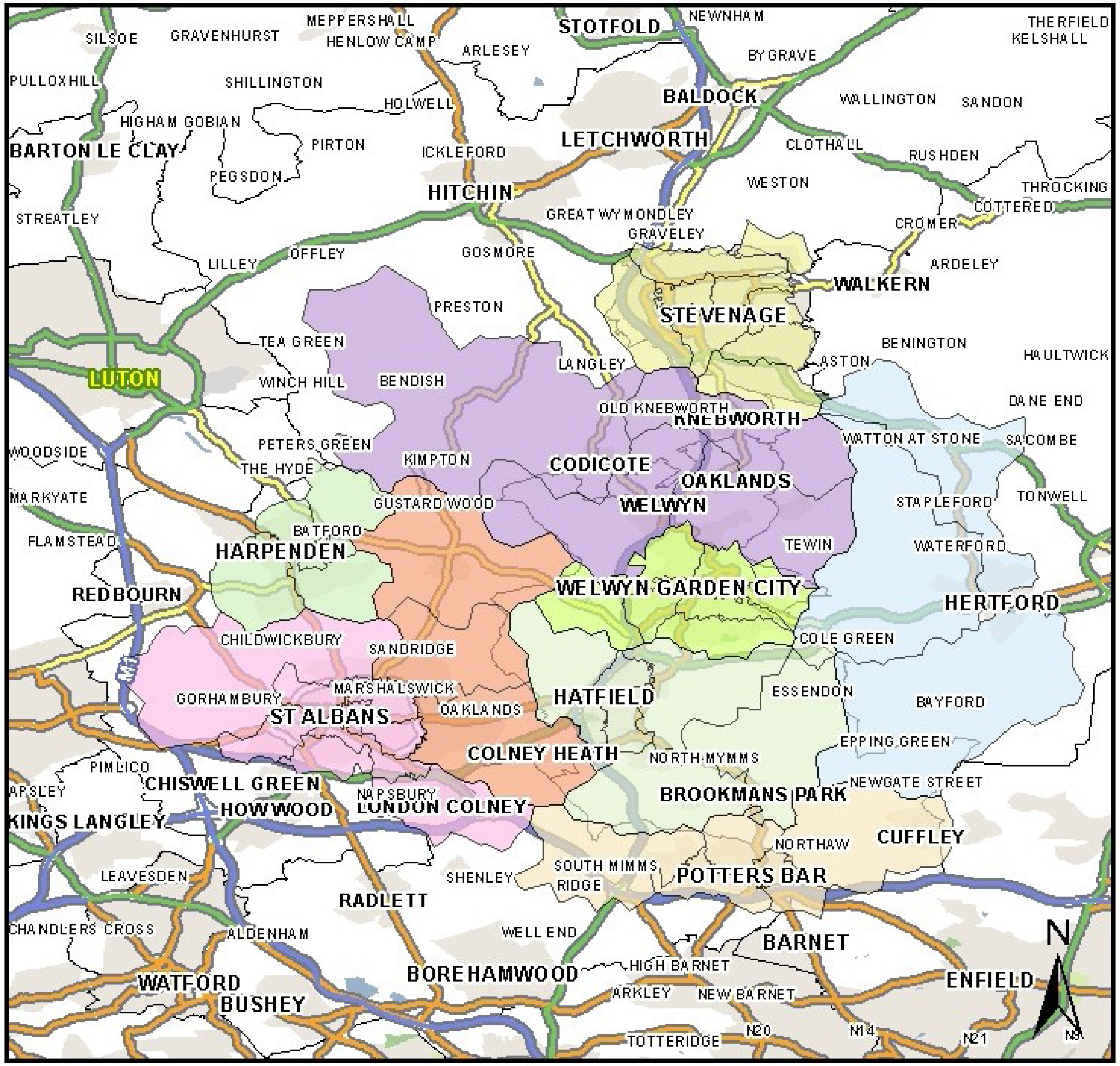
- population projections;
- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping;

- existing retail floorspace and average turnover to floorspace densities; and
- implemented development within and around the study area.

4.21 These key inputs into the retail capacity assessment can be amended to provide revised capacity projections. We do not envisage that the structure of the capacity assessment set out in this report will need to be amended. It may be necessary to undertake an updated household survey to address the implementation of major developments that will significantly alter shopping patterns in the Borough.

Appendix 1 Study Area

Welwyn Hatfield Study Area Map



Legend

- Zone 1
- Zone 2
- Zone 3
- Zone 4
- Zone 5
- Zone 6
- Zone 7
- Zone 8
- Zone 9

0 1 2 4 6 8 Kilometers

Appendix 2 Convenience Retail Capacity

Table 1 - Convenience Floorspace and Benchmark Turnover (2009 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	£12,359	£27.68
	Waitrose, Bridge Road	2,300	90%	2,070	£12,948	£26.80
	Marks and Spencer, Howard Centre	943	100%	943	£10,835	£10.22
	Iceland, Fretherne Road	500	95%	475	£6,874	£3.27
	Welwyn other convenience shops	900	100%	900	£4,000	£3.60
	Morrisons, Black Fan Road	2,926	85%	2,487	£12,689	£31.56
	Welwyn Garden City Total	**10,769**		**9,115**		**£103.13**
Hatfield						
	Asda, Town Centre	4,146	60%	2,488	£13,571	£33.76
	Iceland, Town Centre	530	95%	504	£6,874	£3.46
	Hatfield other convenience shops	735	100%	735	£4,000	£2.94
	Aldi, Hatfield	780	70%	546	£7,094	£3.87
	Tesco, Great North Way, Oldings Corner	5,889	60%	3,533	£12,948	£45.75
	Hatfield Total	**12,080**		**7,806**		**£89.78**
Large Neighbourhood Centres	Co-op, Roe Green Centre, Roe Green	202	100%	202	£8,959	£1.81
	One Stop, High View	251	100%	251	£4,000	£1.00
	Lidl, Moors Walk	790	85%	672	£7,094	£4.76
	Co-op, Hall Grove	154	100%	154	£8,959	£1.38
	Somerfield, Cole Green Lane, Woodhall	449	95%	427	£8,959	£3.82
	Alldays, Cole Green Lane, Woodhall	148	100%	148	£4,000	£0.59
	Other Large Neighbourhood Centres	784	100%	784	£4,000	£3.14
	Large Neighbourhood Centres Total	**2,778**		**2,637**		**£16.51**
Small Neighbourhood Centres	Co-op, Homestead Road, Birchwood	193	100%	193	£8,959	£1.73
	One Stop, Peatree Lane, Peartree	134	100%	134	£4,000	£0.54
	Other Small Neighbourhood Centres	1,600	100%	1,600	£4,000	£6.40
	Small Neighbourhood Centres Total	**1,927**		**1,927**		**£8.67**
Large/Small Village Centres	Co-op, Station Road, Cuffley	142	100%	142	£8,959	£1.27
	Tesco Express, Cuffley	193	100%	193	£12,948	£2.50
	Tesco Express, High Street, Welwyn	175	100%	175	£12,948	£2.27
	Alldays, Bradmore Green, Brookmans Park	140	100%	140	£4,000	£0.56
	Other Village Centres	600	100%	600	£4,000	£2.40
	Village Centres Total	**1,250**		**1,250**		**£9.00**
	GRAND TOTAL	**28,804**		**22,735**	**£9,988**	**£227.08**
		Comparison Sales Floorspace in Food Stores Sq M Net				**6,069**

Sources: IGD Food Store Directory
Experian Goad
Verdict Report on Grocery Retailers 2010

Table 2 : Population Projections

Zone Area	2001	2008	2009	2010	2013	2016	2021	2026
1 - Welwyn Garden City	43,750	47,752	47,887	48,022	48,408	48,786	49,685	50,854
2 - Hatfield	36,945	40,324	40,438	40,552	40,879	41,198	41,957	42,944
3 - Welwyn North	23,811	25,475	25,571	25,667	26,067	26,525	27,350	28,279
4 - St Albans (Rural)	25,906	26,651	26,784	26,916	27,137	27,269	27,450	27,631
5 - Potters Bar	28,093	29,200	29,378	29,555	30,036	30,492	31,331	32,248
6 - Hertford	21,180	22,058	22,219	22,379	22,867	23,359	24,145	25,013
7 - Stevenage (Urban)	76,917	76,687	76,860	77,033	77,668	78,360	79,899	81,629
8 - Harpenden	24,233	24,931	25,055	25,179	25,386	25,509	25,678	25,847
9 - St Albans (Urban)	56,891	58,531	58,822	59,113	59,598	59,889	60,285	60,682
	337,726	**351,611**	**353,014**	**354,417**	**358,046**	**361,387**	**367,780**	**375,127**

Sources: *Chelmer East of England Population Projections Scenario 2 December 2009*
Experian 2001 Population Census 2001

Table 3: Convenience Goods Expenditure Per Capita (2009 Prices)

Expenditure Per Capita	2009	2010	2013	2016	2021	2026
1 - Welwyn Garden City	£1,720	£1,716	£1,719	£1,738	£1,778	£1,817
2 - Hatfield	£1,603	£1,600	£1,602	£1,620	£1,657	£1,693
3 - Welwyn North	£1,993	£1,989	£1,992	£2,014	£2,060	£2,106
4 - St Albans (Rural)	£1,846	£1,842	£1,845	£1,865	£1,908	£1,950
5 - Potters Bar	£1,894	£1,890	£1,893	£1,914	£1,958	£2,001
6 - Hertford	£1,805	£1,801	£1,804	£1,824	£1,866	£1,907
7 - Stevenage (Urban)	£1,728	£1,724	£1,727	£1,746	£1,786	£1,825
8 - Harpenden	£1,868	£1,864	£1,867	£1,888	£1,931	£1,974
9 - St Albans (Urban)	£1,776	£1,772	£1,775	£1,795	£1,836	£1,876

Sources:

Experian local estimates for 2009 convenience goods expenditure per capita

(Excluding special forms of trading)

Experian Business Strategies - recommended forecast growth rates up 2012

Utlta long term growth trend adopted after 2012 (0.5% per annum).

Table 4: Total Available Convenience Goods Expenditure (£M - 2009 Prices)

Zone	2009	2010	2013	2016	2021	2026
1 - Welwyn Garden City	£82.37	£82.42	£83.23	£84.78	£88.34	£92.41
2 - Hatfield	£64.82	£64.86	£65.50	£66.72	£69.52	£72.72
3 - Welwyn North	£50.97	£51.05	£51.93	£53.41	£56.35	£59.54
4 - St Albans (Rural)	£49.44	£49.58	£50.07	£50.86	£52.38	£53.88
5 - Potters Bar	£55.65	£55.87	£56.87	£58.36	£61.35	£64.54
6 - Hertford	£40.11	£40.31	£41.26	£42.61	£45.06	£47.70
7 - Stevenage (Urban)	£132.81	£132.81	£134.13	£136.79	£142.70	£149.00
8 - Harpenden	£46.81	£46.94	£47.40	£48.15	£49.59	£51.01
9 - St Albans (Urban)	£104.48	£104.77	£105.81	£107.48	£110.69	£113.87
Total	**£627.47**	**£628.62**	**£636.20**	**£649.16**	**£675.97**	**£704.68**

Sources: *Table 2 and Table 3*

Table 5: **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	54%	6%	31%	4%	4%	11%	1%	1%	1%
Hatfield	26%	69%	11%	22%	2%	6%	1%	7%	7%
Local shopping Welwyn/Hatfield	17%	13%	17%	1%	5%	0%	0%	0%	0%
Welwyn Hatfield Sub-Total	**97%**	**88%**	**59%**	**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%	8%	11%	13%	11%	9%	5%	10%
Other Sub-Total	**3%**	**12%**	**41%**	**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 chnages since 2007*

Table 6: **Convenience Expenditure 2010 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total Expend
Expenditure 2010	**£82.42**	**£64.86**	**£51.05**	**£49.58**	**£55.87**	**£40.31**	**£132.81**	**£46.94**	**£104.77**	**£628.62**
Welwyn Garden City	£44.51	£3.89	£15.82	£1.98	£2.23	£4.43	£1.33	£0.47	£1.05	£75.72
Hatfield	£21.43	£44.76	£5.61	£10.91	£1.12	£2.42	£1.33	£3.29	£7.33	£98.19
Local shopping facilities	£14.01	£8.43	£8.68	£0.50	£2.79	£0.00	£0.00	£0.00	£0.00	£34.41
Welwyn Hatfield Sub-Total	**£79.95**	**£57.08**	**£30.12**	**£13.39**	**£6.15**	**£6.85**	**£2.66**	**£3.76**	**£8.38**	**£208.33**
St Albans	£0.82	£4.54	£0.51	£26.77	£6.15	£0.00	£0.00	£0.94	£83.82	£123.55
Stevenage	£0.82	£0.65	£13.27	£0.00	£0.56	£4.03	£118.20	£0.47	£0.00	£138.01
Potters Bar	£0.00	£1.95	£0.00	£0.00	£35.75	£0.40	£0.00	£0.00	£0.00	£38.10
Watford	£0.00	£0.00	£0.00	£0.50	£0.00	£0.00	£0.00	£0.00	£1.05	£1.54
Luton	£0.00	£0.00	£1.02	£0.00	£0.00	£0.00	£0.00	£1.41	£0.00	£2.43
Hertford	£0.00	£0.00	£0.00	£0.00	£0.00	£24.59	£0.00	£0.00	£0.00	£24.59
Harpenden	£0.00	£0.00	£2.04	£3.47	£0.00	£0.00	£0.00	£38.02	£1.05	£44.58
Other outflow	£0.82	£0.65	£4.08	£5.45	£7.26	£4.43	£11.95	£2.35	£10.48	£47.48
Other Sub-Total	**£2.47**	**£7.78**	**£20.93**	**£36.19**	**£49.72**	**£33.46**	**£130.16**	**£43.18**	**£96.39**	**£420.29**
TOTAL	**£82.42**	**£64.86**	**£51.05**	**£49.58**	**£55.87**	**£40.31**	**£132.81**	**£46.94**	**£104.77**	**£628.62**

Source: *Table 4 and 5*

Table 7: Convenience Expenditure 2013 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total Expend
Expenditure 2013	**£83.23**	**£65.50**	**£51.93**	**£50.07**	**£56.87**	**£41.26**	**£134.13**	**£47.40**	**£105.81**	**£636.20**
Welwyn Garden City	£44.94	£3.93	£16.10	£2.00	£2.27	£4.54	£1.34	£0.47	£1.06	£76.66
Hatfield	£21.64	£45.19	£5.71	£11.02	£1.14	£2.48	£1.34	£3.32	£7.41	£99.24
Local shopping facilities	£14.15	£8.51	£8.83	£0.50	£2.84	£0.00	£0.00	£0.00	£0.00	£34.84
Welwyn Hatfield Sub-Total	**£80.73**	**£57.64**	**£30.64**	**£13.52**	**£6.26**	**£7.01**	**£2.68**	**£3.79**	**£8.46**	**£210.73**
St Albans	£0.83	£4.58	£0.52	£27.04	£6.26	£0.00	£0.00	£0.95	£84.65	£124.83
Stevenage	£0.83	£0.65	£13.50	£0.00	£0.57	£4.13	£119.38	£0.47	£0.00	£139.54
Potters Bar	£0.00	£1.96	£0.00	£0.00	£36.40	£0.41	£0.00	£0.00	£0.00	£38.78
Watford	£0.00	£0.00	£0.00	£0.50	£0.00	£0.00	£0.00	£0.00	£1.06	£1.56
Luton	£0.00	£0.00	£1.04	£0.00	£0.00	£0.00	£0.00	£1.42	£0.00	£2.46
Hertford	£0.00	£0.00	£0.00	£0.00	£0.00	£25.17	£0.00	£0.00	£0.00	£25.17
Harpenden	£0.00	£0.00	£2.08	£3.50	£0.00	£0.00	£0.00	£38.40	£1.06	£45.04
Other outflow	£0.83	£0.65	£4.15	£5.51	£7.39	£4.54	£12.07	£2.37	£10.58	£48.10
Other Sub-Total	**£2.50**	**£7.86**	**£21.29**	**£36.55**	**£50.62**	**£34.25**	**£131.45**	**£43.61**	**£97.34**	**£425.47**
TOTAL	**£83.23**	**£65.50**	**£51.93**	**£50.07**	**£56.87**	**£41.26**	**£134.13**	**£47.40**	**£105.81**	**£636.20**

Table 8: **Convenience Expenditure 2016 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total Expend
Expenditure 2016	**£84.78**	**£66.72**	**£53.41**	**£50.86**	**£58.36**	**£42.61**	**£136.79**	**£48.15**	**£107.48**	**£649.16**
Welwyn Garden City	£45.78	£4.00	£16.56	£2.03	£2.33	£4.69	£1.37	£0.48	£1.07	£78.32
Hatfield	£22.04	£46.04	£5.88	£11.19	£1.17	£2.56	£1.37	£3.37	£7.52	£101.13
Local shopping facilities	£14.41	£8.67	£9.08	£0.51	£2.92	£0.00	£0.00	£0.00	£0.00	£35.59
Welwyn Hatfield Sub-Total	**£82.24**	**£58.72**	**£31.51**	**£13.73**	**£6.42**	**£7.24**	**£2.74**	**£3.85**	**£8.60**	**£215.05**
St Albans	£0.85	£4.67	£0.53	£27.46	£6.42	£0.00	£0.00	£0.96	£85.98	£126.88
Stevenage	£0.85	£0.67	£13.89	£0.00	£0.58	£4.26	£121.75	£0.48	£0.00	£142.48
Potters Bar	£0.00	£2.00	£0.00	£0.00	£37.35	£0.43	£0.00	£0.00	£0.00	£39.78
Watford	£0.00	£0.00	£0.00	£0.51	£0.00	£0.00	£0.00	£0.00	£1.07	£1.58
Luton	£0.00	£0.00	£1.07	£0.00	£0.00	£0.00	£0.00	£1.44	£0.00	£2.51
Hertford	£0.00	£0.00	£0.00	£0.00	£0.00	£25.99	£0.00	£0.00	£0.00	£25.99
Harpenden	£0.00	£0.00	£2.14	£3.56	£0.00	£0.00	£0.00	£39.00	£1.07	£45.77
Other outflow	£0.85	£0.67	£4.27	£5.59	£7.59	£4.69	£12.31	£2.41	£10.75	£49.12
Other Sub-Total	**£2.54**	**£8.01**	**£21.90**	**£37.13**	**£51.94**	**£35.36**	**£134.06**	**£44.30**	**£98.88**	**£434.11**
TOTAL	**£84.78**	**£66.72**	**£53.41**	**£50.86**	**£58.36**	**£42.61**	**£136.79**	**£48.15**	**£107.48**	**£649.16**

Table 9: **Convenience Expenditure 2021 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total Expend
Expenditure 2021	**£88.34**	**£69.52**	**£56.35**	**£52.38**	**£61.35**	**£45.06**	**£142.70**	**£49.59**	**£110.69**	**£675.97**
Welwyn Garden City	£47.70	£4.17	£17.47	£2.10	£2.45	£4.96	£1.43	£0.50	£1.11	£81.88
Hatfield	£22.97	£47.97	£6.20	£11.52	£1.23	£2.70	£1.43	£3.47	£7.75	£105.24
Local shopping facilities	£15.02	£9.04	£9.58	£0.52	£3.07	£0.00	£0.00	£0.00	£0.00	£37.23
Welwyn Hatfield Sub-Total	**£85.69**	**£61.18**	**£33.24**	**£14.14**	**£6.75**	**£7.66**	**£2.85**	**£3.97**	**£8.86**	**£224.34**
St Albans	£0.88	£4.87	£0.56	£28.28	£6.75	£0.00	£0.00	£0.99	£88.55	£130.89
Stevenage	£0.88	£0.70	£14.65	£0.00	£0.61	£4.51	£127.00	£0.50	£0.00	£148.85
Potters Bar	£0.00	£2.09	£0.00	£0.00	£39.26	£0.45	£0.00	£0.00	£0.00	£41.80
Watford	£0.00	£0.00	£0.00	£0.52	£0.00	£0.00	£0.00	£0.00	£1.11	£1.63
Luton	£0.00	£0.00	£1.13	£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	£27.48	£0.00	£0.00	£0.00	£27.48
Harpenden	£0.00	£0.00	£2.25	£3.67	£0.00	£0.00	£0.00	£40.17	£1.11	£47.19
Other outflow	£0.88	£0.70	£4.51	£5.76	£7.98	£4.96	£12.84	£2.48	£11.07	£51.17
Other Sub-Total	**£2.65**	**£8.34**	**£23.10**	**£38.24**	**£54.60**	**£37.40**	**£139.85**	**£45.62**	**£101.83**	**£451.63**
TOTAL	**£88.34**	**£69.52**	**£56.35**	**£52.38**	**£61.35**	**£45.06**	**£142.70**	**£49.59**	**£110.69**	**£675.97**

Table 10: **Convenience Expenditure 2026 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total Expend
Expenditure 2026	**£92.41**	**£72.72**	**£59.54**	**£53.88**	**£64.54**	**£47.70**	**£149.00**	**£51.01**	**£113.87**	**£704.68**
Welwyn Garden City	£49.90	£4.36	£18.46	£2.16	£2.58	£5.25	£1.49	£0.51	£1.14	£85.85
Hatfield	£24.03	£50.18	£6.55	£11.85	£1.29	£2.86	£1.49	£3.57	£7.97	£109.79
Local shopping facilities	£15.71	£9.45	£10.12	£0.54	£3.23	£0.00	£0.00	£0.00	£0.00	£39.05
Welwyn Hatfield Sub-Total	**£89.64**	**£64.00**	**£35.13**	**£14.55**	**£7.10**	**£8.11**	**£2.98**	**£4.08**	**£9.11**	**£234.69**
St Albans	£0.92	£5.09	£0.60	£29.10	£7.10	£0.00	£0.00	£1.02	£91.09	£134.92
Stevenage	£0.92	£0.73	£15.48	£0.00	£0.65	£4.77	£132.61	£0.51	£0.00	£155.67
Potters Bar	£0.00	£2.18	£0.00	£0.00	£41.30	£0.48	£0.00	£0.00	£0.00	£43.96
Watford	£0.00	£0.00	£0.00	£0.54	£0.00	£0.00	£0.00	£0.00	£1.14	£1.68
Luton	£0.00	£0.00	£1.19	£0.00	£0.00	£0.00	£0.00	£1.53	£0.00	£2.72
Hertford	£0.00	£0.00	£0.00	£0.00	£0.00	£29.10	£0.00	£0.00	£0.00	£29.10
Harpenden	£0.00	£0.00	£2.38	£3.77	£0.00	£0.00	£0.00	£41.32	£1.14	£48.61
Other outflow	£0.92	£0.73	£4.76	£5.93	£8.39	£5.25	£13.41	£2.55	£11.39	£53.33
Other Sub-Total	**£2.77**	**£8.73**	**£24.41**	**£39.33**	**£57.44**	**£39.59**	**£146.02**	**£46.93**	**£104.76**	**£469.99**
TOTAL	**£92.41**	**£72.72**	**£59.54**	**£53.88**	**£64.54**	**£47.70**	**£149.00**	**£51.01**	**£113.87**	**£704.68**

Table 11: Convenience Floorspace Projections (£Million)

Town	2010	2013	2016	2021	2026
Available Expenditure in District					
Welwyn Garden City	£75.72	£76.66	£78.32	£81.88	£85.85
Hatfield	£98.19	£99.24	£101.13	£105.24	£109.79
Neighbourhood/Village Centres	£34.41	£34.84	£35.59	£37.23	£39.05
Total	**£208.33**	**£210.73**	**£215.05**	**£224.34**	**£234.69**
Benchmark Turnover of Existing Facilities					
Welwyn Garden City	£103.13	£103.13	£103.13	£103.13	£103.13
Hatfield	£89.78	£89.78	£89.78	£89.78	£89.78
Neighbourhood/Village Centres	£34.18	£34.18	£34.18	£34.18	£34.18
Total	**£227.09**	**£227.09**	**£227.09**	**£227.09**	**£227.09**
Surplus Expenditure					
Welwyn Garden City	-£27.41	-£26.47	-£24.81	-£21.25	-£17.28
Hatfield	£8.41	£9.46	£11.35	£15.46	£20.01
Neighbourhood/Village Centres	£0.23	£0.66	£1.41	£3.05	£4.87
Total	**-£18.76**	**-£16.36**	**-£12.04**	**-£2.75**	**£7.60**
Turnover Density for New Floorspace £ per Sq M					
Welwyn Garden City	£11,000	£11,000	£11,000	£11,000	£11,000
Hatfield	£11,000	£11,000	£11,000	£11,000	£11,000
Neighbourhood/Village Centres	£4,000	£4,000	£4,000	£4,000	£4,000
Sales Floorspace (Sq m Net)					
Welwyn Garden City	-2,492	-2,406	-2,255	-1,932	-1,571
Hatfield	765	860	1,032	1,405	1,820
Neighbourhood/Village Centres	58	164	353	762	1,218
Total	**-1,669**	**-1,383**	**-870**	**235**	**1,466**
Gross Floorspace (Sq M Gross)					
Welwyn Garden City	-3,559	-3,438	-3,221	-2,760	-2,245
Hatfield	1,093	1,228	1,474	2,007	2,599
Neighbourhood/Village Centres	83	234	505	1,088	1,740
Total	**-2,384**	**-1,975**	**-1,242**	**335**	**2,095**

Sources: Tables 1, 4 to 10

Appendix 3 Comparison Retail 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 2 : Population Projections

Zone Area	2001	2008	2009	2010	2013	2016	2021	2026
1 - Welwyn Garden City	43,750	47,752	47,887	48,022	48,408	48,786	49,685	50,854
2 - Hatfield	36,945	40,324	40,438	40,552	40,879	41,198	41,957	42,944
3 - Welwyn North	23,811	25,475	25,571	25,667	26,067	26,525	27,350	28,279
4 - St Albans (Rural)	25,906	26,651	26,784	26,916	27,137	27,269	27,450	27,631
5 - Potters Bar	28,093	29,200	29,378	29,555	30,036	30,492	31,331	32,248
6 - Hertford	21,180	22,058	22,219	22,379	22,867	23,359	24,145	25,013
7 - Stevenage (Urban)	76,917	76,687	76,860	77,033	77,668	78,360	79,899	81,629
8 - Harpenden	24,233	24,931	25,055	25,179	25,386	25,509	25,678	25,847
9 - St Albans (Urban)	56,891	58,531	58,822	59,113	59,598	59,889	60,285	60,682
	337,726	**351,611**	**353,014**	**354,417**	**358,046**	**361,387**	**367,780**	**375,127**

Sources: *Chelmer East of England Population Projections Scenario 2 December 2009*

Experian 2001 Population Census 2001

Table 3: Comparison Goods Expenditure Per Capita (2009 Prices)

Expenditure Per Capita	2009	2010	2013	2016	2021	2026
1 - Welwyn Garden City	£2,583	£2,556	£2,734	£3,128	£3,944	£4,973
2 - Hatfield	£2,480	£2,455	£2,626	£3,003	£3,787	£4,775
3 - Welwyn North	£3,267	£3,234	£3,459	£3,957	£4,989	£6,291
4 - St Albans (Rural)	£3,003	£2,972	£3,179	£3,636	£4,585	£5,782
5 - Potters Bar	£2,983	£2,953	£3,158	£3,613	£4,556	£5,744
6 - Hertford	£2,882	£2,853	£3,052	£3,491	£4,402	£5,550
7 - Stevenage (Urban)	£2,579	£2,553	£2,730	£3,123	£3,938	£4,966
8 - Harpenden	£3,048	£3,017	£3,227	£3,691	£4,654	£5,869
9 - St Albans (Urban)	£2,898	£2,869	£3,068	£3,510	£4,426	£5,580

Sources:

Experian local estimates for 2009 comparison goods expenditure per capita

(Excluding special forms of trading)

Experian Business Strategies - recommended forecast growth rates up to 2012

Ultra Long term growth rate of 4.7% after 2012.

Table 4: Total Available Comparison Goods Expenditure (£M - 2009 Prices)

Zone	2009	2010	2013	2016	2021	2026
1 - Welwyn Garden City	£123.67	£122.77	£132.36	£152.59	£195.95	£252.90
2 - Hatfield	£100.28	£99.55	£107.33	£123.73	£158.90	£205.07
3 - Welwyn North	£83.54	£83.01	£90.17	£104.95	£136.45	£177.91
4 - St Albans (Rural)	£80.42	£80.00	£86.26	£99.16	£125.86	£159.75
5 - Potters Bar	£87.64	£87.28	£94.86	£110.16	£142.73	£185.24
6 - Hertford	£64.04	£63.85	£69.78	£81.54	£106.28	£138.83
7 - Stevenage (Urban)	£198.22	£196.65	£212.06	£244.74	£314.66	£405.37
8 - Harpenden	£76.36	£75.97	£81.91	£94.16	£119.52	£151.70
9 - St Albans (Urban)	£170.47	£169.58	£182.86	£210.19	£266.80	£338.63
Total	**£984.64**	**£978.65**	**£1,057.59**	**£1,221.21**	**£1,567.15**	**£2,015.41**

Sources: *Table 2 and Table 3*

Table 5: **Comparison Shopping Penetration Rates and Available Expenditure 2010**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expenditure
Expenditure 2010	**£122.77**	**£99.55**	**£83.01**	**£80.00**	**£87.28**	**£63.85**	**£196.65**	**£75.97**	**£169.58**	**n/a**	**£978.65**
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	£73.66	£23.89	£26.56	£11.20	£13.96	£12.77	£9.83	£15.95	£10.17	£22.00	£220.01
Hatfield town centre	£8.59	£20.91	£0.83	£4.00	£3.49	£0.64	£0.00	£0.76	£1.70	£0.00	£40.91
Neighbourhood/Village Centres	£1.23	£3.98	£2.49	£0.80	£1.75	£2.55	£0.00	£1.52	£3.39	£0.00	£17.71
Hatfield Galleria	£3.68	£6.97	£2.49	£2.40	£1.75	£0.00	£1.97	£1.52	£1.70	£14.98	£37.45
Out-of-centre stores	£11.05	£7.96	£2.49	£3.20	£4.36	£0.64	£0.00	£0.00	£0.00	£3.30	£33.01
Welwyn Hatfield Sub-Total	**£98.21**	**£63.71**	**£34.86**	**£21.60**	**£25.31**	**£16.60**	**£11.80**	**£19.75**	**£16.96**	**£40.28**	**£349.09**
St Albans	£3.68	£9.95	£2.49	£37.60	£3.49	£0.64	£1.97	£12.91	£105.14	n/a	£177.88
Potters Bar	£0.00	£1.00	£0.00	£0.00	£14.84	£0.00	£0.00	£0.00	£0.00	n/a	£15.83
Watford	£1.23	£1.99	£0.00	£4.00	£2.62	£0.00	£1.97	£3.04	£15.26	n/a	£30.10
Luton	£0.00	£1.00	£3.32	£3.20	£0.00	£0.00	£1.97	£14.43	£1.70	n/a	£25.61
London Colney	£0.00	£3.98	£0.83	£5.60	£9.60	£0.64	£1.97	£1.52	£11.87	n/a	£36.01
Stevenage	£12.28	£9.95	£24.90	£1.60	£1.75	£10.85	£159.29	£1.52	£1.70	n/a	£223.84
Other outflow	£7.37	£7.96	£16.60	£6.40	£29.67	£35.12	£17.70	£22.79	£16.96	n/a	£160.57
Other Sub-Total	**£24.55**	**£35.84**	**£48.14**	**£58.40**	**£61.97**	**£47.25**	**£184.85**	**£56.22**	**£152.62**	**n/a**	**£669.84**
TOTAL TURNOVER	**£122.77**	**£99.55**	**£83.01**	**£80.00**	**£87.28**	**£63.85**	**£196.65**	**£75.97**	**£169.58**	**£40.28**	**£1,018.93**

Sources: *NEMS Household and Street Surveys 2007 and NLP adjustments*

Table 6: **Comparison Shopping Penetration Rates and Available Expenditure 2013**

Centre/Facilities	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**	**% Inflow**	**Total Expenditure**
Expenditure 2013	**£132.36**	**£107.33**	**£90.17**	**£86.26**	**£94.86**	**£69.78**	**£212.06**	**£81.91**	**£182.86**	**n/a**	**£1,057.59**
Market Share											
Welwyn Garden City town centre	60%	24%	32%	14%	16%	20%	5%	21%	6%	10%	
Hatfield town centre	8%	24%	1%	6%	5%	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	**81%**	**67%**	**42%**	**28%**	**30%**	**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	***101%***	***103%***	***100%***	***101%***	***101%***	***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	£79.42	£25.76	£28.85	£12.08	£15.18	£13.96	£10.60	£17.20	£10.97	£23.78	£237.79
Hatfield town centre	£10.59	£25.76	£0.90	£5.18	£4.74	£0.70	£0.00	£0.82	£1.83	£0.00	£50.51
Neighbourhood/Village Centres	£1.32	£4.29	£2.70	£0.86	£1.90	£2.79	£0.00	£1.64	£3.66	£0.00	£19.17
Hatfield Galleria	£3.97	£7.51	£2.70	£2.59	£1.90	£0.00	£2.12	£1.64	£1.83	£16.17	£40.44
Out-of-centre stores	£11.91	£8.59	£2.70	£3.45	£4.74	£0.70	£0.00	£0.00	£0.00	£3.57	£35.66
Welwyn Hatfield Sub-Total	**£107.21**	**£71.91**	**£37.87**	**£24.15**	**£28.46**	**£18.14**	**£12.72**	**£21.30**	**£18.29**	**£43.52**	**£383.57**
St Albans	£3.97	£10.73	£2.70	£40.54	£3.79	£0.70	£2.12	£13.93	£113.37	n/a	£191.86
Potters Bar	£0.00	£1.07	£0.00	£0.00	£16.13	£0.00	£0.00	£0.00	£0.00	n/a	£17.20
Watford	£1.32	£2.15	£0.00	£4.31	£2.85	£0.00	£2.12	£3.28	£16.46	n/a	£32.48
Luton	£0.00	£1.07	£3.61	£3.45	£0.00	£0.00	£2.12	£15.56	£1.83	n/a	£27.64
London Colney	£0.00	£4.29	£0.90	£6.04	£10.43	£0.70	£2.12	£1.64	£12.80	n/a	£38.92
Stevenage	£13.24	£10.73	£27.05	£1.73	£1.90	£11.86	£171.77	£1.64	£1.83	n/a	£241.74
Other outflow	£7.94	£8.59	£18.03	£6.90	£32.25	£38.38	£19.09	£24.57	£18.29	n/a	£174.04
Other Sub-Total	**£26.47**	**£38.64**	**£52.30**	**£62.97**	**£67.35**	**£51.64**	**£199.33**	**£60.62**	**£164.57**	**n/a**	**£723.89**
TOTAL TURNOVER	**£133.68**	**£110.55**	**£90.17**	**£87.13**	**£95.81**	**£69.78**	**£212.06**	**£81.91**	**£182.86**	**£43.52**	**£1,107.47**

Table 7: **Comparison Shopping Penetration Rates and Available Expenditure 2016**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expenditure
Expenditure 2016	**£152.59**	**£123.73**	**£104.95**	**£99.16**	**£110.16**	**£81.54**	**£244.74**	**£94.16**	**£210.19**	**n/a**	**£1,221.21**
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	£86.97	£27.22	£31.48	£12.89	£16.52	£15.49	£7.34	£19.77	£12.61	£25.59	£255.90
Hatfield town centre	£13.73	£33.41	£2.10	£6.94	£6.61	£1.63	£0.00	£0.94	£2.10	£0.00	£67.46
Neighbourhood/Village Centres	£1.53	£4.95	£3.15	£0.99	£2.20	£3.26	£0.00	£1.88	£4.20	£0.00	£22.17
Hatfield Galleria	£4.58	£6.19	£3.15	£2.97	£2.20	£0.00	£2.45	£1.88	£2.10	£17.02	£42.54
Out-of-centre stores	£12.21	£7.42	£3.15	£3.97	£5.51	£0.82	£0.00	£0.00	£0.00	£3.67	£36.74
Welwyn Hatfield Sub-Total	**£119.02**	**£79.19**	**£43.03**	**£27.76**	**£33.05**	**£21.20**	**£9.79**	**£24.48**	**£21.02**	**£46.28**	**£424.82**
St Albans	£3.05	£11.14	£3.15	£42.64	£4.41	£0.82	£2.45	£16.01	£128.22	n/a	£211.87
Potters Bar	£0.00	£1.24	£0.00	£0.00	£16.52	£0.00	£0.00	£0.00	£0.00	n/a	£17.76
Watford	£1.53	£2.47	£0.00	£4.96	£3.30	£0.00	£2.45	£3.77	£18.92	n/a	£37.39
Luton	£0.00	£1.24	£4.20	£3.97	£0.00	£0.00	£2.45	£17.89	£2.10	n/a	£31.84
London Colney	£0.00	£4.95	£1.05	£6.94	£12.12	£0.82	£2.45	£1.88	£14.71	n/a	£44.92
Stevenage	£19.84	£14.85	£35.68	£4.96	£4.41	£16.31	£220.26	£2.82	£4.20	n/a	£323.33
Other outflow	£9.16	£8.66	£17.84	£7.93	£36.35	£42.40	£4.89	£27.31	£21.02	n/a	£175.56
Other Sub-Total	**£33.57**	**£44.54**	**£61.92**	**£71.39**	**£77.11**	**£60.34**	**£234.95**	**£69.68**	**£189.17**	**n/a**	**£842.67**
TOTAL TURNOVER	**£152.59**	**£123.73**	**£104.95**	**£99.16**	**£110.16**	**£81.54**	**£244.74**	**£94.16**	**£210.19**	**£46.28**	**£1,267.49**

Table 8: **Comparison Shopping Penetration Rates and Available Expenditure 2021**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expenditure
Expenditure 2021	**£195.95**	**£158.90**	**£136.45**	**£125.86**	**£142.73**	**£106.28**	**£314.66**	**£119.52**	**£266.80**	**n/a**	**£1,567.15**
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	£111.69	£34.96	£40.94	£16.36	£21.41	£20.19	£9.44	£25.10	£16.01	£32.90	£329.00
Hatfield town centre	£17.64	£42.90	£2.73	£8.81	£8.56	£2.13	£0.00	£1.20	£2.67	£0.00	£86.63
Neighbourhood/Village Centres	£1.96	£6.36	£4.09	£1.26	£2.85	£4.25	£0.00	£2.39	£5.34	£0.00	£28.50
Hatfield Galleria	£5.88	£7.94	£4.09	£3.78	£2.85	£0.00	£3.15	£2.39	£2.67	£21.83	£54.59
Out-of-centre stores	£15.68	£9.53	£4.09	£5.03	£7.14	£1.06	£0.00	£0.00	£0.00	£4.73	£47.26
Welwyn Hatfield Sub-Total	**£152.84**	**£101.69**	**£55.95**	**£35.24**	**£42.82**	**£27.63**	**£12.59**	**£31.07**	**£26.68**	**£59.46**	**£545.98**
St Albans	£3.92	£14.30	£4.09	£54.12	£5.71	£1.06	£3.15	£20.32	£162.75	n/a	£269.42
Potters Bar	£0.00	£1.59	£0.00	£0.00	£21.41	£0.00	£0.00	£0.00	£0.00	n/a	£23.00
Watford	£1.96	£3.18	£0.00	£6.29	£4.28	£0.00	£3.15	£4.78	£24.01	n/a	£47.65
Luton	£0.00	£1.59	£5.46	£5.03	£0.00	£0.00	£3.15	£22.71	£2.67	n/a	£40.60
London Colney	£0.00	£6.36	£1.36	£8.81	£15.70	£1.06	£3.15	£2.39	£18.68	n/a	£57.51
Stevenage	£25.47	£19.07	£46.39	£6.29	£5.71	£21.26	£283.19	£3.59	£5.34	n/a	£416.31
Other outflow	£11.76	£11.12	£23.20	£10.07	£47.10	£55.26	£6.29	£34.66	£26.68	n/a	£226.14
Other Sub-Total	**£43.11**	**£57.20**	**£80.51**	**£90.62**	**£99.91**	**£78.64**	**£302.07**	**£88.44**	**£240.12**	**n/a**	**£1,080.63**
TOTAL TURNOVER	**£195.95**	**£158.90**	**£136.45**	**£125.86**	**£142.73**	**£106.28**	**£314.66**	**£119.52**	**£266.80**	**£59.46**	**£1,626.61**

Table 9: **Comparison Shopping Penetration Rates and Available Expenditure 2026**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expenditure
Expenditure 2026	**£252.90**	**£205.07**	**£177.91**	**£159.75**	**£185.24**	**£138.83**	**£405.37**	**£151.70**	**£338.63**	**n/a**	**£2,015.41**
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	£144.15	£45.12	£53.37	£20.77	£27.79	£26.38	£12.16	£31.86	£20.32	£42.43	£424.34
Hatfield town centre	£22.76	£55.37	£3.56	£11.18	£11.11	£2.78	£0.00	£1.52	£3.39	£0.00	£111.67
Neighbourhood/Village Centres	£2.53	£8.20	£5.34	£1.60	£3.70	£5.55	£0.00	£3.03	£6.77	£0.00	£36.73
Hatfield Galleria	£7.59	£10.25	£5.34	£4.79	£3.70	£0.00	£4.05	£3.03	£3.39	£28.10	£70.25
Out-of-centre stores	£20.23	£12.30	£5.34	£6.39	£9.26	£1.39	£0.00	£0.00	£0.00	£6.10	£61.02
Welwyn Hatfield Sub-Total	**£197.26**	**£131.25**	**£72.94**	**£44.73**	**£55.57**	**£36.10**	**£16.21**	**£39.44**	**£33.86**	**£76.64**	**£704.01**
St Albans	£5.06	£18.46	£5.34	£68.69	£7.41	£1.39	£4.05	£25.79	£206.57	n/a	£342.75
Potters Bar	£0.00	£2.05	£0.00	£0.00	£27.79	£0.00	£0.00	£0.00	£0.00	n/a	£29.84
Watford	£2.53	£4.10	£0.00	£7.99	£5.56	£0.00	£4.05	£6.07	£30.48	n/a	£60.77
Luton	£0.00	£2.05	£7.12	£6.39	£0.00	£0.00	£4.05	£28.82	£3.39	n/a	£51.82
London Colney	£0.00	£8.20	£1.78	£11.18	£20.38	£1.39	£4.05	£3.03	£23.70	n/a	£73.72
Stevenage	£32.88	£24.61	£60.49	£7.99	£7.41	£27.77	£364.83	£4.55	£6.77	n/a	£537.29
Other outflow	£15.17	£14.36	£30.24	£12.78	£61.13	£72.19	£8.11	£43.99	£33.86	n/a	£291.84
Other Sub-Total	**£55.64**	**£73.83**	**£104.97**	**£115.02**	**£129.67**	**£102.73**	**£389.15**	**£112.26**	**£304.77**	**n/a**	**£1,388.03**
TOTAL TURNOVER	**£252.90**	**£205.07**	**£177.91**	**£159.75**	**£185.24**	**£138.83**	**£405.37**	**£151.70**	**£338.63**	**£76.64**	**£2,092.04**

Table 10: Summary of Comparison Expenditure/Floorspace Projections

Centre	2010	2013	2016	2021	2026
Available Expenditure					
Welwyn Garden City town centre	£220.01	£237.79	£255.90	£329.00	£424.34
Hatfield town centre	£40.91	£50.51	£67.46	£86.63	£111.67
Neighbourhood/Village Centres	£17.71	£19.17	£22.17	£28.50	£36.73
Hatfield Galleria	£37.45	£40.44	£42.54	£54.59	£70.25
Out-of-centre stores	£33.01	£35.66	£36.74	£47.26	£61.02
Total	**£349.09**	**£383.57**	**£424.82**	**£545.98**	**£704.01**
Benchmark Turnover of Existing Floorspace					
Welwyn Garden City town centre	£220.01	£224.41	£238.15	£262.93	£290.30
Hatfield town centre	£40.91	£57.11	£75.96	£83.86	£92.59
Neighbourhood/Village Centres	£17.71	£18.06	£19.17	£21.17	£23.37
Hatfield Galleria	£37.45	£38.20	£40.54	£44.75	£49.41
Out-of-centre stores	£33.01	£33.67	£35.73	£39.45	£43.55
Total	**£349.09**	**£371.45**	**£409.54**	**£452.16**	**£499.22**
Surplus Expenditure					
Welwyn Garden City town centre	n/a	£13.38	£17.76	£66.06	£134.05
Hatfield town centre	n/a	-£6.60	-£8.49	£2.77	£19.08
Neighbourhood/Village Centres	n/a	£1.10	£3.00	£7.33	£13.36
Hatfield Galleria	n/a	£2.24	£2.00	£9.83	£20.84
Out-of-centre stores	n/a	£2.00	£1.02	£7.82	£17.47
Total	**n/a**	**£12.12**	**£15.28**	**£93.82**	**£204.79**
Sales Density for New Floorspace					
Welwyn Garden City town centre	£5,000	£5,100	£5,412	£5,975	£6,597
Hatfield town centre	£5,000	£5,100	£5,412	£5,975	£6,597
Neighbourhood/Village Centres	£4,000	£4,080	£4,330	£4,780	£5,278
Hatfield Galleria	£3,500	£3,570	£3,789	£4,183	£4,618
Out-of-centre stores	£3,000	£3,060	£3,247	£3,585	£3,958
Sales Floorspace (Sq M Net)					
Welwyn Garden City town centre	n/a	2,624	3,281	11,056	20,318
Hatfield town centre	n/a	-1,294	-1,569	463	2,891
Neighbourhood/Village Centres	n/a	271	692	1,534	2,532
Hatfield Galleria	n/a	627	529	2,351	4,512
Out-of-centre stores	n/a	652	313	2,181	4,412
Total	**n/a**	**2,880**	**3,246**	**17,585**	**34,665**
Gross Floorspace (Sq M Gross)					
Welwyn Garden City town centre	n/a	3,499	4,375	14,741	27,091
Hatfield town centre	n/a	-1,725	-2,092	617	3,855
Neighbourhood/Village Centres	n/a	361	923	2,046	3,376
Hatfield Galleria	n/a	836	705	3,135	6,016
Out-of-centre stores	n/a	767	368	2,566	5,191
Total	**n/a**	**3,738**	**4,279**	**23,104**	**45,528**