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Retail Needs Study Update 2012

Welwyn Hatfield Borough Council

7 March 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 2028, 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 2028. 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 2013, 2018, 2023 and 2028.

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 in the short term (2011 to 2013). 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 For longer term projections Experian provide forecast growth rates and trend line projections. Experian's average annual growth forecast for the period 2014 to 2018 is 0.5% for convenience goods and 3% for comparison goods. The

ultra long term trend line annual growth rates are 0.6% for convenience goods and 5.9% for comparison goods.

- 2.9 We believe the Experian's lower EBS growth forecast rates for 2011 to 2013 reflect the current economic circumstances and provide an appropriate growth rate for the short term. In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth forecasts (0.5% and 3%) are relatively cautious based on past growth rates. The ultra long trend line projection for comparison goods (5.9%) is relatively optimistic. We believe long term growth (after 2013) is likely to fall within this range and therefore we adopt the mid-point growth rate between Experian's lower growth forecast and the higher trend line projections. The mid-point annual growth rates adopted after 2013 are 0.55% for convenience goods and 4.45% for comparison goods. In our view these mid-point growth rates provide the most appropriate average growth rate following and the economic recovery.
- 2.10 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.
- 2.11 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

- 2.12 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

- 2.13 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).
- 2.14 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

- 2.15 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.
- 2.16 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.
- 2.17 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.
- 2.18 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.
- 2.19 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.
- 2.20 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.
- 2.21 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

- 2.22 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).

2.23 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.

2.24 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.

2.25 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

2.26 The level of available convenience goods expenditure in 2013, 2018, 2023 and 2028 is shown at Tables 7 to 10 in Appendix 1.

2.27 The total level of convenience goods expenditure available for shops in Welwyn Hatfield Borough between 2011 and 2028 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.

2.28 Convenience expenditure attracted to shopping facilities in Welwyn Hatfield Borough is expected to increase from £219.79 million in 2011 to £227.31 million in 2018 and to £248.16 million in 2028.

2.29 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.

2.30 Within the Borough, future expenditure growth result in a surplus of expenditure of £0.68million in 2011 rising to £29.05 million in 2028.

2.31 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.

- 2.32 Surplus expenditure at 2018 could support 1,741 sq m sales floorspace (2,487 sq m gross), or 4,037 sq m net (5,768 sq m gross) by 2028, as shown in Table 11, Appendix 1.

Quantitative Capacity for Comparison Floorspace

- 2.33 Available comparison goods expenditure has been projected forward to 2013, 2018, 2023 and 2028 in Tables 5 to 8 in Appendix 2, and summarised in Table 9. Available comparison expenditure is expected to increase from £365.79 million in 2011 to £450.40 million in 2018 and to £712.34 million in 2028.
- 2.34 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 9. Table 9 assumes 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, which we believe is realistic if an expenditure growth rate of 4.45% 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.
- 2.35 Population and expenditure growth will result in a comparison expenditure surplus at 2018 of +£18.74 million increasing to +£201.42 million in 2028. Surplus comparison expenditure has been converted into comparison floorspace projections at the foot of Table 9 in Appendix 2. These figures take into account retail development proposals in Hatfield town centre.
- 2.36 Surplus expenditure at 2018 could support 3,829 sq m sales floorspace (5,034 sq m gross), or 33,699 sq m net (44,237 sq m gross) by 2028.

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 2013, 2018, 2023 and 2028. 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

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

3.5

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

3.6

Meeting the projections between 2011 and 2018 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.

3.7

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.

3.8

Long term forecasts up to 2023 and 2028 may be more susceptible to change, due to unforeseen circumstances. Projected surplus expenditure beyond 2018 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.

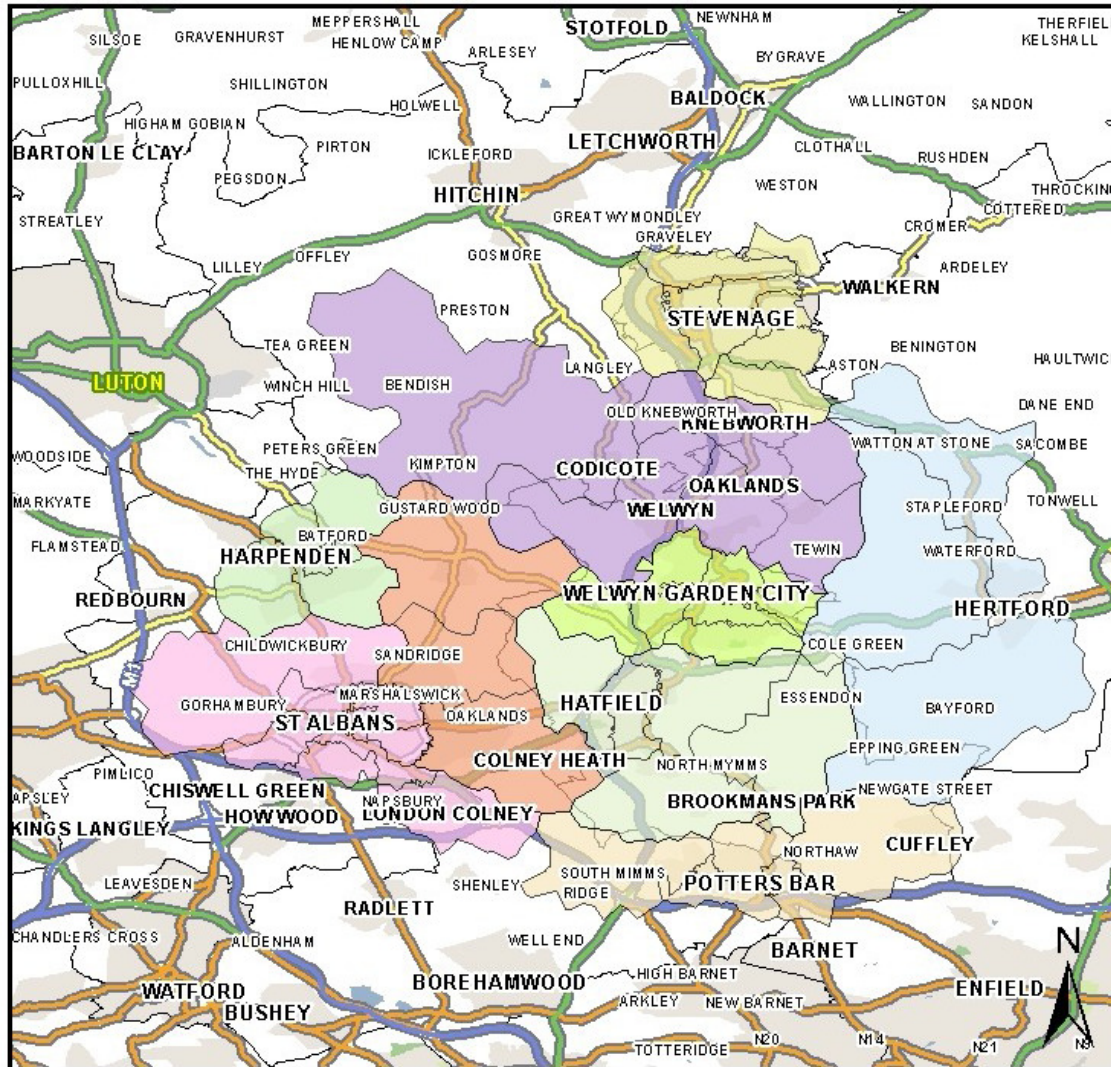
Convenience Goods Development

- 3.9 The quantitative capacity analysis indicates that in the short to medium term up to 2018, there is scope for up to approximately 2,500 sq m gross convenience floorspace. In the long term this may rise to about 5,800 sq m gross up to 2028.
- 3.10 Most of the capacity identified up to 2018 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 2018 would be less than 1,000 sq m gross, increasing to 3,500 sq m gross by 2028.
- 3.11 Given the limited capacity forecast up to 2018 for large food store development, there is no need to identify additional sites in the LDF for foodstore development.

Comparison Goods Development

- 3.12 The quantitative capacity indicates that there could be scope for about an additional 5,000 sq m gross floorspace in the Borough as a whole, over and above the development proposals in Hatfield Town Centre in the short to medium term up to 2018.
- 3.13 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).
- 3.14 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.

Appendix 1 Convenience Goods Capacity



Welwyn Hatfield Study Area Map

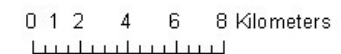
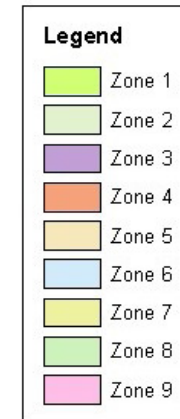


Table 1: Convenience Floorspace and Benchmark Turnover (2010 prices)

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, Peartree	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	2013	2018	2023	2028
1 - Welwyn Garden City	43,750	48,156	48,273	48,674	49,344	50,121
2 - Hatfield	36,945	40,666	40,765	41,103	41,668	42,325
3 - Welwyn North	23,811	25,763	25,847	26,084	26,400	26,768
4 - St Albans (Rural)	25,906	27,049	26,943	26,662	26,357	26,052
5 - Potters Bar	28,093	29,733	30,022	30,776	31,609	32,523
6 - Hertford	21,180	22,540	22,796	23,425	24,068	24,798
7 - Stevenage (Urban)	76,917	77,206	77,668	78,976	80,591	82,321
8 - Harpenden	24,233	25,303	25,204	24,941	24,656	24,370
9 - St Albans (Urban)	56,891	59,404	59,171	58,554	57,884	57,215
	337,726	355,819	356,689	359,194	362,577	366,494

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	2013	2018	2023	2028
1 - Welwyn Garden City	£1,799	£1,786	£1,817	£1,859	£1,899
2 - Hatfield	£1,631	£1,619	£1,647	£1,685	£1,721
3 - Welwyn North	£2,171	£2,155	£2,192	£2,243	£2,291
4 - St Albans (Rural)	£1,941	£1,926	£1,959	£2,005	£2,048
5 - Potters Bar	£2,062	£2,047	£2,082	£2,130	£2,176
6 - Hertford	£1,874	£1,860	£1,892	£1,936	£1,977
7 - Stevenage (Urban)	£1,755	£1,742	£1,771	£1,813	£1,851
8 - Harpenden	£1,962	£1,947	£1,980	£2,027	£2,070
9 - St Albans (Urban)	£1,904	£1,890	£1,922	£1,967	£2,008

Sources:

Experian local estimates for 2010 convenience goods expenditure per capita

(Excluding special forms of trading)

Experian Business Strategies - recommended forecast growth rates up 2013

Mid-point of Experian forecast and ultra long term growth trend adopted after 2013

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

Zone	2011	2013	2018	2023	2028
1 - Welwyn Garden City	£86.63	£86.46	£89.30	£93.23	£97.36
2 - Hatfield	£66.33	£66.18	£68.35	£71.36	£74.51
3 - Welwyn North	£55.93	£56.18	£58.87	£62.18	£65.61
4 - St Albans (Rural)	£52.50	£52.27	£53.56	£55.18	£56.74
5 - Potters Bar	£61.31	£61.48	£64.18	£67.52	£71.04
6 - Hertford	£42.24	£42.53	£44.79	£47.42	£50.22
7 - Stevenage (Urban)	£135.50	£135.30	£139.87	£146.11	£152.38
8 - Harpenden	£49.64	£49.43	£50.64	£52.19	£53.64
9 - St Albans (Urban)	£113.10	£112.64	£115.41	£118.89	£122.17
Total	£663.19	£662.46	£684.97	£714.08	£743.66

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 8: Convenience Expenditure 2018 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total Expend
Expenditure 2018	£89.30	£68.35	£58.87	£53.56	£64.18	£44.79	£139.87	£50.64	£115.41	£684.97
Welwyn Garden City	£50.01	£6.15	£18.25	£2.14	£2.57	£4.93	£1.40	£0.51	£1.15	£87.10
Hatfield	£22.32	£45.11	£7.06	£11.78	£1.28	£2.69	£1.40	£3.54	£8.08	£103.28
Local shopping facilities	£14.29	£8.89	£10.01	£0.54	£3.21	£0.00	£0.00	£0.00	£0.00	£36.93
Welwyn Hatfield Sub-Total	£86.62	£60.15	£35.32	£14.46	£7.06	£7.61	£2.80	£4.05	£9.23	£227.31
St Albans	£0.89	£4.78	£0.59	£28.92	£7.06	£0.00	£0.00	£1.01	£92.33	£135.59
Stevenage	£0.89	£0.68	£15.31	£0.00	£0.64	£4.48	£124.48	£0.51	£0.00	£146.99
Potters Bar	£0.00	£2.05	£0.00	£0.00	£41.08	£0.45	£0.00	£0.00	£0.00	£43.58
Watford	£0.00	£0.00	£0.00	£0.54	£0.00	£0.00	£0.00	£0.00	£1.15	£1.69
Luton	£0.00	£0.00	£1.18	£0.00	£0.00	£0.00	£0.00	£1.52	£0.00	£2.70
Hertford	£0.00	£0.00	£0.00	£0.00	£0.00	£27.32	£0.00	£0.00	£0.00	£27.32
Harpenden	£0.00	£0.00	£2.35	£3.75	£0.00	£0.00	£0.00	£41.02	£1.15	£48.28
Other outflow	£0.89	£0.68	£4.12	£5.89	£8.34	£4.93	£12.59	£2.53	£11.54	£51.52
Other Sub-Total	£2.68	£8.20	£23.55	£39.10	£57.12	£37.18	£137.07	£46.59	£106.18	£457.66
TOTAL	£89.30	£68.35	£58.87	£53.56	£64.18	£44.79	£139.87	£50.64	£115.41	£684.97

Table 9: Convenience Expenditure 2023 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total Expend
Expenditure 2023	£93.23	£71.36	£62.18	£55.18	£67.52	£47.42	£146.11	£52.19	£118.89	£714.08
Welwyn Garden City	£52.21	£6.42	£19.28	£2.21	£2.70	£5.22	£1.46	£0.52	£1.19	£91.21
Hatfield	£23.31	£47.10	£7.46	£12.14	£1.35	£2.85	£1.46	£3.65	£8.32	£107.64
Local shopping facilities	£14.92	£9.28	£10.57	£0.55	£3.38	£0.00	£0.00	£0.00	£0.00	£38.69
Welwyn Hatfield Sub-Total	£90.44	£62.80	£37.31	£14.90	£7.43	£8.06	£2.92	£4.17	£9.51	£237.54
St Albans	£0.93	£5.00	£0.62	£29.80	£7.43	£0.00	£0.00	£1.04	£95.11	£139.93
Stevenage	£0.93	£0.71	£16.17	£0.00	£0.68	£4.74	£130.04	£0.52	£0.00	£153.79
Potters Bar	£0.00	£2.14	£0.00	£0.00	£43.21	£0.47	£0.00	£0.00	£0.00	£45.83
Watford	£0.00	£0.00	£0.00	£0.55	£0.00	£0.00	£0.00	£0.00	£1.19	£1.74
Luton	£0.00	£0.00	£1.24	£0.00	£0.00	£0.00	£0.00	£1.57	£0.00	£2.81
Hertford	£0.00	£0.00	£0.00	£0.00	£0.00	£28.92	£0.00	£0.00	£0.00	£28.92
Harpenden	£0.00	£0.00	£2.49	£3.86	£0.00	£0.00	£0.00	£42.27	£1.19	£49.81
Other outflow	£0.93	£0.71	£4.35	£6.07	£8.78	£5.22	£13.15	£2.61	£11.89	£53.71
Other Sub-Total	£2.80	£8.56	£24.87	£40.28	£60.09	£39.36	£143.19	£48.01	£109.38	£476.54
TOTAL	£93.23	£71.36	£62.18	£55.18	£67.52	£47.42	£146.11	£52.19	£118.89	£714.08

Table 10: Convenience Expenditure 2028 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total Expend
Expenditure 2028	£97.36	£74.51	£65.61	£56.74	£71.04	£50.22	£152.38	£53.64	£122.17	£743.66
Welwyn Garden City	£54.52	£6.71	£20.34	£2.27	£2.84	£5.52	£1.52	£0.54	£1.22	£95.48
Hatfield	£24.34	£49.18	£7.87	£12.48	£1.42	£3.01	£1.52	£3.76	£8.55	£112.13
Local shopping facilities	£15.58	£9.69	£11.15	£0.57	£3.55	£0.00	£0.00	£0.00	£0.00	£40.54
Welwyn Hatfield Sub-Total	£94.44	£65.57	£39.37	£15.32	£7.81	£8.54	£3.05	£4.29	£9.77	£248.16
St Albans	£0.97	£5.22	£0.66	£30.64	£7.81	£0.00	£0.00	£1.07	£97.73	£144.10
Stevenage	£0.97	£0.75	£17.06	£0.00	£0.71	£5.02	£135.62	£0.54	£0.00	£160.66
Potters Bar	£0.00	£2.24	£0.00	£0.00	£45.47	£0.50	£0.00	£0.00	£0.00	£48.20
Watford	£0.00	£0.00	£0.00	£0.57	£0.00	£0.00	£0.00	£0.00	£1.22	£1.79
Luton	£0.00	£0.00	£1.31	£0.00	£0.00	£0.00	£0.00	£1.61	£0.00	£2.92
Hertford	£0.00	£0.00	£0.00	£0.00	£0.00	£30.63	£0.00	£0.00	£0.00	£30.63
Harpenden	£0.00	£0.00	£2.62	£3.97	£0.00	£0.00	£0.00	£43.45	£1.22	£51.27
Other outflow	£0.97	£0.75	£4.59	£6.24	£9.24	£5.52	£13.71	£2.68	£12.22	£55.92
Other Sub-Total	£2.92	£8.94	£26.25	£41.42	£63.23	£41.68	£149.33	£49.35	£112.39	£495.51
TOTAL	£97.36	£74.51	£65.61	£56.74	£71.04	£50.22	£152.38	£53.64	£122.17	£743.66

Table 11: Convenience Floorspace Projections (£Million)

Town	2011	2013	2018	2023	2028
Available Expenditure in District					
Welwyn Garden City	£84.00	£83.99	£87.10	£91.21	£95.48
Hatfield	£100.20	£100.01	£103.28	£107.64	£112.13
Neighbourhood/Village Centres	£35.58	£35.58	£36.93	£38.69	£40.54
Total	£219.79	£219.59	£227.31	£237.54	£248.16
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	-£16.00	-£12.89	-£8.78	-£4.51
Hatfield	£11.17	£10.98	£14.25	£18.61	£23.10
Neighbourhood/Village Centres	£5.49	£5.49	£6.84	£8.60	£10.45
Total	£0.68	£0.48	£8.20	£18.43	£29.05
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	-1,333	-1,074	-732	-376
Hatfield	931	915	1,187	1,551	1,925
Neighbourhood/Village Centres	1,308	1,308	1,627	2,048	2,487
Total	907	890	1,741	2,867	4,037
Gross Floorspace (Sq M Gross)					
Welwyn Garden City	-1,903	-1,905	-1,534	-1,046	-537
Hatfield	1,330	1,308	1,696	2,216	2,751
Neighbourhood/Village Centres	1,868	1,869	2,325	2,926	3,553
Total	1,295	1,271	2,487	4,096	5,768

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 2: Comparison Goods Expenditure Per Capita (2010 Prices)

Expenditure Per Capita	2011	2013	2018	2023	2028
1 - Welwyn Garden City	£2,641	£2,688	£3,300	£4,103	£5,100
2 - Hatfield	£2,447	£2,490	£3,057	£3,801	£4,725
3 - Welwyn North	£3,520	£3,583	£4,399	£5,468	£6,798
4 - St Albans (Rural)	£3,178	£3,234	£3,970	£4,936	£6,136
5 - Potters Bar	£3,253	£3,311	£4,065	£5,054	£6,283
6 - Hertford	£2,938	£2,990	£3,671	£4,564	£5,673
7 - Stevenage (Urban)	£2,574	£2,620	£3,216	£3,999	£4,971
8 - Harpenden	£3,280	£3,338	£4,098	£5,095	£6,334
9 - St Albans (Urban)	£3,041	£3,095	£3,800	£4,724	£5,873

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 3: Total Available Comparison Goods Expenditure (£M - 2010 Prices)

Zone	2011	2013	2018	2023	2028
1 - Welwyn Garden City	£127.18	£129.76	£160.62	£202.46	£255.62
2 - Hatfield	£99.51	£101.50	£125.65	£158.38	£199.99
3 - Welwyn North	£90.68	£92.61	£114.74	£144.36	£181.97
4 - St Albans (Rural)	£85.96	£87.13	£105.85	£130.10	£159.85
5 - Potters Bar	£96.72	£99.40	£125.10	£159.75	£204.34
6 - Hertford	£66.22	£68.16	£85.99	£109.84	£140.68
7 - Stevenage (Urban)	£198.73	£203.49	£253.99	£322.28	£409.22
8 - Harpenden	£82.99	£84.13	£102.21	£125.62	£154.36
9 - St Albans (Urban)	£180.65	£183.13	£222.51	£273.45	£336.02
Total	£1,028.65	£1,049.33	£1,296.66	£1,626.24	£2,042.06

Sources:

Table 2 and Table 3

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 5: 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	£129.76	£101.50	£92.61	£87.13	£99.40	£68.16	£203.49	£84.13	£183.13	n/a	£1,049.33
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	£77.86	£24.36	£29.64	£12.20	£15.90	£13.63	£10.17	£17.67	£10.99	£23.60	£236.02
Hatfield town centre	£9.08	£21.32	£0.93	£4.36	£3.98	£0.68	£0.00	£0.84	£1.83	£0.00	£43.01
Neighbourhood/Village Centres	£1.30	£4.06	£2.78	£0.87	£1.99	£2.73	£0.00	£1.68	£3.66	£0.00	£19.07
Hatfield Galleria	£3.89	£7.11	£2.78	£2.61	£1.99	£0.00	£2.03	£1.68	£1.83	£15.95	£39.88
Out-of-centre stores	£11.68	£8.12	£2.78	£3.49	£4.97	£0.68	£0.00	£0.00	£0.00	£3.52	£35.24
Welwyn Hatfield Sub-Total	£103.81	£64.96	£38.90	£23.53	£28.83	£17.72	£12.21	£21.87	£18.31	£43.08	£373.21
St Albans	£3.89	£10.15	£2.78	£40.95	£3.98	£0.68	£2.03	£14.30	£113.54	n/a	£192.31
Potters Bar	£0.00	£1.02	£0.00	£0.00	£16.90	£0.00	£0.00	£0.00	£0.00	n/a	£17.91
Watford	£1.30	£2.03	£0.00	£4.36	£2.98	£0.00	£2.03	£3.37	£16.48	n/a	£32.55
Luton	£0.00	£1.02	£3.70	£3.49	£0.00	£0.00	£2.03	£15.98	£1.83	n/a	£28.06
London Colney	£0.00	£4.06	£0.93	£6.10	£10.93	£0.68	£2.03	£1.68	£12.82	n/a	£39.24
Stevenage	£12.98	£10.15	£27.78	£1.74	£1.99	£11.59	£164.83	£1.68	£1.83	n/a	£234.57
Other outflow	£7.79	£8.12	£18.52	£6.97	£33.80	£37.49	£18.31	£25.24	£18.31	n/a	£174.55
Other Sub-Total	£25.95	£36.54	£53.71	£63.61	£70.58	£50.44	£191.28	£62.26	£164.82	n/a	£719.19
TOTAL TURNOVER	£129.76	£101.50	£92.61	£87.13	£99.40	£68.16	£203.49	£84.13	£183.13	£43.08	£1,092.40

Table 6: Comparison Shopping Penetration Rates and Available Expenditure 2018

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expenditure
Expenditure 2018	£160.62	£125.65	£114.74	£105.85	£125.10	£85.99	£253.99	£102.21	£222.51	n/a	£1,296.66
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	£91.55	£27.64	£34.42	£13.76	£18.77	£16.34	£7.62	£21.46	£13.35	£27.21	£272.13
Hatfield town centre	£14.46	£33.93	£2.29	£7.41	£7.51	£1.72	£0.00	£1.02	£2.23	£0.00	£70.56
Neighbourhood/Village Centres	£1.61	£5.03	£3.44	£1.06	£2.50	£3.44	£0.00	£2.04	£4.45	£0.00	£23.57
Hatfield Galleria	£4.82	£6.28	£3.44	£3.18	£2.50	£0.00	£2.54	£2.04	£2.23	£18.02	£45.05
Out-of-centre stores	£12.85	£7.54	£3.44	£4.23	£6.26	£0.86	£0.00	£0.00	£0.00	£3.91	£39.09
Welwyn Hatfield Sub-Total	£125.29	£80.42	£47.04	£29.64	£37.53	£22.36	£10.16	£26.57	£22.25	£49.14	£450.40
St Albans	£3.21	£11.31	£3.44	£45.51	£5.00	£0.86	£2.54	£17.38	£135.73	n/a	£224.99
Potters Bar	£0.00	£1.26	£0.00	£0.00	£18.77	£0.00	£0.00	£0.00	£0.00	n/a	£20.02
Watford	£1.61	£2.51	£0.00	£5.29	£3.75	£0.00	£2.54	£4.09	£20.03	n/a	£39.82
Luton	£0.00	£1.26	£4.59	£4.23	£0.00	£0.00	£2.54	£19.42	£2.23	n/a	£34.26
London Colney	£0.00	£5.03	£1.15	£7.41	£13.76	£0.86	£2.54	£2.04	£15.58	n/a	£48.36
Stevenage	£20.88	£15.08	£39.01	£5.29	£5.00	£17.20	£228.59	£3.07	£4.45	n/a	£338.57
Other outflow	£9.64	£8.80	£19.51	£8.47	£41.28	£44.72	£5.08	£29.64	£22.25	n/a	£189.38
Other Sub-Total	£35.34	£45.23	£67.70	£76.21	£87.57	£63.64	£243.83	£75.63	£200.26	n/a	£895.41
TOTAL TURNOVER	£160.62	£125.65	£114.74	£105.85	£125.10	£85.99	£253.99	£102.21	£222.51	£49.14	£1,345.81

Table 7: Comparison Shopping Penetration Rates and Available Expenditure 2023

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expenditure
Expenditure 2023	£202.46	£158.38	£144.36	£130.10	£159.75	£109.84	£322.28	£125.62	£273.45	n/a	£1,626.24
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	£115.40	£34.84	£43.31	£16.91	£23.96	£20.87	£9.67	£26.38	£16.41	£34.19	£341.95
Hatfield town centre	£18.22	£42.76	£2.89	£9.11	£9.59	£2.20	£0.00	£1.26	£2.73	£0.00	£88.75
Neighbourhood/Village Centres	£2.02	£6.34	£4.33	£1.30	£3.20	£4.39	£0.00	£2.51	£5.47	£0.00	£29.56
Hatfield Galleria	£6.07	£7.92	£4.33	£3.90	£3.20	£0.00	£3.22	£2.51	£2.73	£22.59	£56.49
Out-of-centre stores	£16.20	£9.50	£4.33	£5.20	£7.99	£1.10	£0.00	£0.00	£0.00	£4.92	£49.24
Welwyn Hatfield Sub-Total	£157.92	£101.36	£59.19	£36.43	£47.93	£28.56	£12.89	£32.66	£27.34	£61.71	£565.99
St Albans	£4.05	£14.25	£4.33	£55.94	£6.39	£1.10	£3.22	£21.36	£166.80	n/a	£277.45
Potters Bar	£0.00	£1.58	£0.00	£0.00	£23.96	£0.00	£0.00	£0.00	£0.00	n/a	£25.55
Watford	£2.02	£3.17	£0.00	£6.50	£4.79	£0.00	£3.22	£5.02	£24.61	n/a	£49.35
Luton	£0.00	£1.58	£5.77	£5.20	£0.00	£0.00	£3.22	£23.87	£2.73	n/a	£42.39
London Colney	£0.00	£6.34	£1.44	£9.11	£17.57	£1.10	£3.22	£2.51	£19.14	n/a	£60.43
Stevenage	£26.32	£19.01	£49.08	£6.50	£6.39	£21.97	£290.05	£3.77	£5.47	n/a	£428.56
Other outflow	£12.15	£11.09	£24.54	£10.41	£52.72	£57.12	£6.45	£36.43	£27.34	n/a	£238.24
Other Sub-Total	£44.54	£57.02	£85.17	£93.67	£111.83	£81.28	£309.39	£92.96	£246.10	n/a	£1,121.96
TOTAL TURNOVER	£202.46	£158.38	£144.36	£130.10	£159.75	£109.84	£322.28	£125.62	£273.45	£61.71	£1,687.95

Table 8: Comparison Shopping Penetration Rates and Available Expenditure 2028

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	£255.62	£199.99	£181.97	£159.85	£204.34	£140.68	£409.22	£154.36	£336.02	n/a	£2,042.06
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	£145.70	£44.00	£54.59	£20.78	£30.65	£26.73	£12.28	£32.42	£20.16	£43.03	£430.34
Hatfield town centre	£23.01	£54.00	£3.64	£11.19	£12.26	£2.81	£0.00	£1.54	£3.36	£0.00	£111.81
Neighbourhood/Village Centres	£2.56	£8.00	£5.46	£1.60	£4.09	£5.63	£0.00	£3.09	£6.72	£0.00	£37.14
Hatfield Galleria	£7.67	£10.00	£5.46	£4.80	£4.09	£0.00	£4.09	£3.09	£3.36	£28.37	£70.92
Out-of-centre stores	£20.45	£12.00	£5.46	£6.39	£10.22	£1.41	£0.00	£0.00	£0.00	£6.21	£62.14
Welwyn Hatfield Sub-Total	£199.38	£127.99	£74.61	£44.76	£61.30	£36.58	£16.37	£40.13	£33.60	£77.61	£712.34
St Albans	£5.11	£18.00	£5.46	£68.74	£8.17	£1.41	£4.09	£26.24	£204.97	n/a	£342.19
Potters Bar	£0.00	£2.00	£0.00	£0.00	£30.65	£0.00	£0.00	£0.00	£0.00	n/a	£32.65
Watford	£2.56	£4.00	£0.00	£7.99	£6.13	£0.00	£4.09	£6.17	£30.24	n/a	£61.19
Luton	£0.00	£2.00	£7.28	£6.39	£0.00	£0.00	£4.09	£29.33	£3.36	n/a	£52.45
London Colney	£0.00	£8.00	£1.82	£11.19	£22.48	£1.41	£4.09	£3.09	£23.52	n/a	£75.59
Stevenage	£33.23	£24.00	£61.87	£7.99	£8.17	£28.14	£368.30	£4.63	£6.72	n/a	£543.05
Other outflow	£15.34	£14.00	£30.93	£12.79	£67.43	£73.15	£8.18	£44.77	£33.60	n/a	£300.20
Other Sub-Total	£56.24	£72.00	£107.36	£115.10	£143.04	£104.10	£392.85	£114.23	£302.42	n/a	£1,407.33
TOTAL TURNOVER	£255.62	£199.99	£181.97	£159.85	£204.34	£140.68	£409.22	£154.36	£336.02	£77.61	£2,119.67

Table 9: Summary of Comparison Expenditure/Floorspace Projections

Centre	2011	2013	2018	2023	2028
Available Expenditure					
Welwyn Garden City town centre	£231.30	£236.02	£272.13	£341.95	£430.34
Hatfield town centre	£42.17	£43.01	£70.56	£88.75	£111.81
Neighbourhood/Village Centres	£18.69	£19.07	£23.57	£29.56	£37.14
Hatfield Galleria	£39.11	£39.88	£45.05	£56.49	£70.92
Out-of-centre stores	£34.52	£35.24	£39.09	£49.24	£62.14
Total	£365.79	£373.21	£450.40	£565.99	£712.34
Benchmark Turnover of Existing Floorspace					
Welwyn Garden City town centre	£231.30	£231.30	£251.64	£273.77	£297.84
Hatfield town centre	£42.17	£58.97	£79.59	£86.58	£94.20
Neighbourhood/Village Centres	£18.69	£18.69	£20.33	£22.12	£24.07
Hatfield Galleria	£39.11	£39.11	£42.55	£46.30	£50.37
Out-of-centre stores	£34.52	£34.52	£37.55	£40.85	£44.45
Total	£365.79	£382.59	£431.66	£469.62	£510.92
Surplus Expenditure					
Welwyn Garden City town centre	n/a	£4.72	£20.49	£68.18	£132.50
Hatfield town centre	n/a	-£15.96	-£9.03	£2.17	£17.61
Neighbourhood/Village Centres	n/a	£0.38	£3.24	£7.44	£13.07
Hatfield Galleria	n/a	£0.76	£2.50	£10.19	£20.55
Out-of-centre stores	n/a	£0.72	£1.54	£8.39	£17.69
Total	n/a	-£9.37	£18.74	£96.37	£201.42
Sales Density for New Floorspace					
Welwyn Garden City town centre	£5,200	£5,200	£5,657	£6,155	£6,696
Hatfield town centre	£5,200	£5,200	£5,657	£6,155	£6,696
Neighbourhood/Village Centres	£4,200	£4,200	£4,569	£4,971	£5,408
Hatfield Galleria	£3,600	£3,600	£3,917	£4,261	£4,636
Out-of-centre stores	£3,100	£3,100	£3,373	£3,669	£3,992
Sales Floorspace (Sq M Net)					
Welwyn Garden City town centre	n/a	908	3,623	11,078	19,788
Hatfield town centre	n/a	-3,069	-1,595	352	2,630
Neighbourhood/Village Centres	n/a	90	708	1,497	2,417
Hatfield Galleria	n/a	212	637	2,391	4,433
Out-of-centre stores	n/a	233	456	2,287	4,432
Total	n/a	-1,626	3,829	17,605	33,699
Gross Floorspace (Sq M Gross)					
Welwyn Garden City town centre	n/a	1,210	4,830	14,770	26,383
Hatfield town centre	n/a	-4,092	-2,127	469	3,507
Neighbourhood/Village Centres	n/a	120	945	1,996	3,222
Hatfield Galleria	n/a	283	850	3,188	5,910
Out-of-centre stores	n/a	274	536	2,690	5,215
Total	n/a	-2,204	5,034	23,114	44,237