

Hertsmere Local Development Framework

Core Strategy

Retail Topic
Paper

Appendices

August 2009

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Appendix A

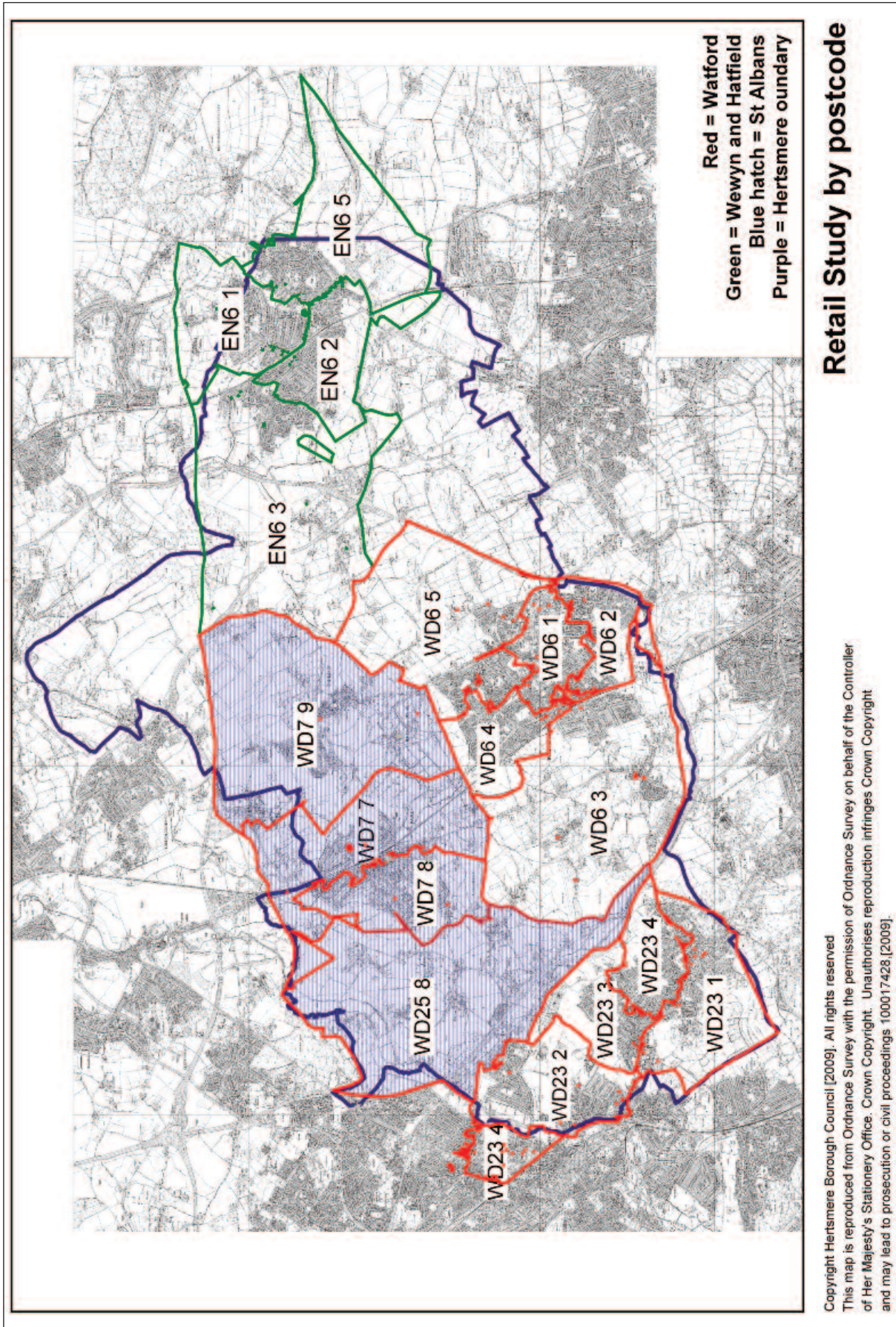
Retail study coverage

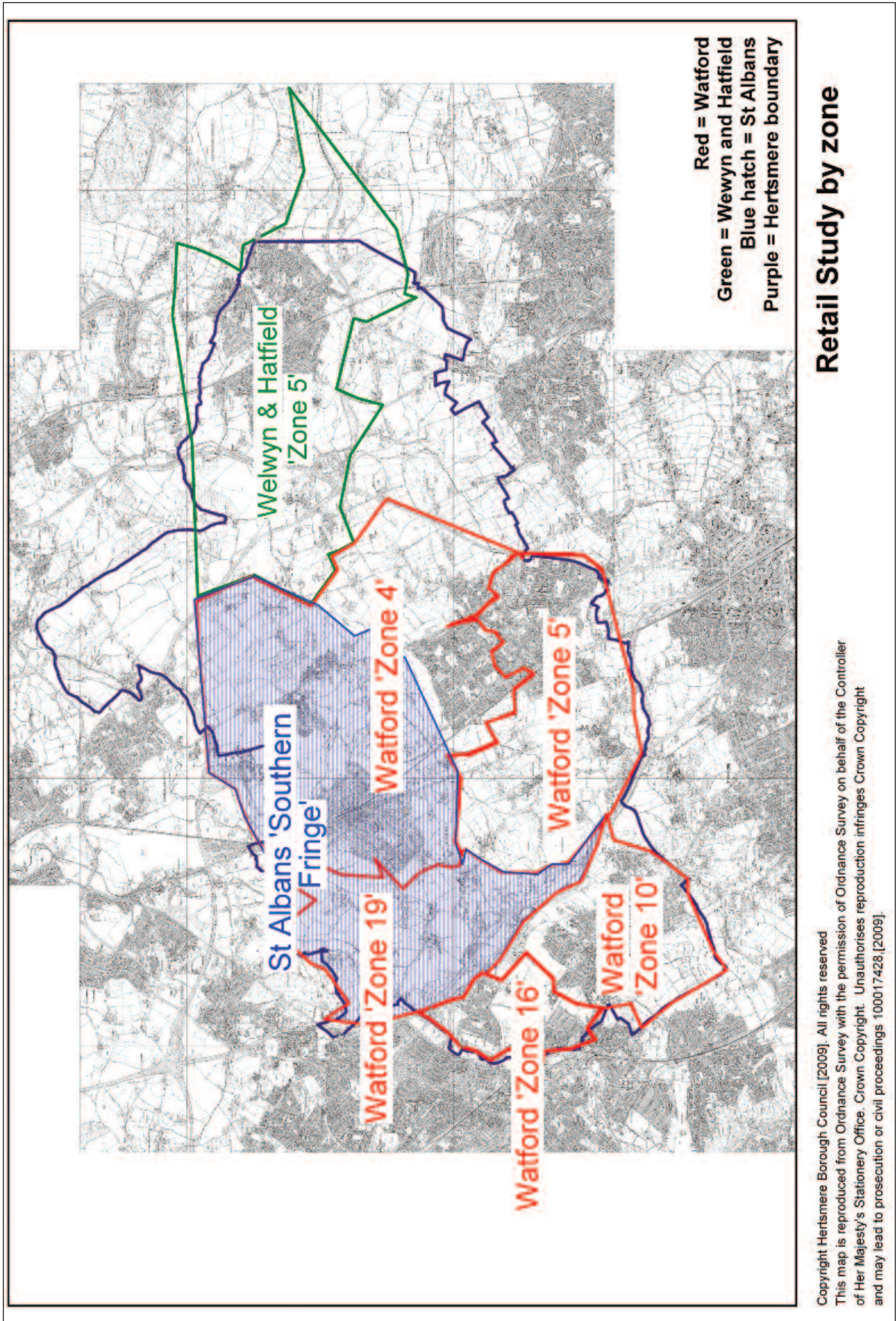
Retail study by postcode (to accompany maps)

Retail study	Postcode & zone*	Colour on map
Watford (2007)	WD6 4-5 & WD7 7-9 (Zone 4) WD6 1-3 (Zone 5) WD23 1,3 & 4 (Zone 10) WD23 2 (Zone 16) WD25 8 (Zone 19)	Red outline**
St Albans (2005)	WD7 7-9 & WD25 8 (Southern fringe)	Blue horizontal line**
Welwyn and Hatfield (2007)	EN6 1-3 & 5 (Zone 5)	Green outline

* Zone as stated within retail study.

** Note that Watford and St Albans retail study area overlap





Appendix B

Travel distances

Travel distance from town and district centres in Hertsmere to nearby retail destinations

Town or District Centre	Harlequin Centre, Watford	Brent Cross Shopping Centre	Victoria Street, St Albans	Colney Fields Shopping Centre, London Colney	Galleria Shopping Centre, Hatfield	Broadwalk Centre / Edgware Town Centre
Borehamwood	6.5 miles (26 minutes)	8.0 miles (28 minutes)	13.4 miles (23 minutes)	6.8 miles (16 minutes)	9.3 miles (17 minutes)	4.9 miles (19 minutes)

Town or District Centre	Harlequin Centre, Watford	Broadwalk Centre / Edgware Town Centre
Bushey (High Street)	1.6 miles (8 minutes)	5.7 miles (21 minutes)

Town or District Centre	Harlequin Centre, Watford	Brent Cross Shopping Centre	St George's Centre / Harrow Town Centre	Broadwalk Centre / Edgware Town Centre
Bushey Heath (High Road)	3.6 miles (16 minutes)	9.2 miles (30 minutes)	4.7 miles (19 minutes)	4.0 miles (16 minutes)

Town or District Centre	Colney Fields Shopping Centre, London Colney	Palace Gardens / Enfield Town Centre	Galleria Shopping Centre, Hatfield
Potters Bar (Darkes Lane)	7.7 miles (14 minutes)	6.4 miles (20 minutes)	9.9 miles (17 minutes)

Town or District Centre	Harlequin Centre, Watford	Victoria Street, St Albans	Colney Fields Shopping Centre, London Colney
Radlett	4.6 miles (18 minutes)	5.4 miles (12 minutes)	3.9 miles (11 minutes)

Source: AA Route Planner

Appendix C

Retail needs: Watford study 2005

Expenditure Person WD6 1 Area Profile Report

MapInfo

Project: Profile Report
Prepared For: CB Richard Ellis Ltd
Prepared By: MapInfo Ltd



Area: WD6 1
Comparison Area: Great Britain

Description	Value	Area %	Comparison Area %	Index	Index
2001 Expenditure Estimates					
Population and household counts					
Usually resident population 2001	22,003	100.00	100.00	100	
Consumer retail expenditure estimates					
Per person					
Food - expenditure per person	1,128	25.03	25.70	97	
Alcoholic drink - expenditure per person	168	3.73	4.62	81	
Tobacco - expenditure per person	227	5.04	6.18	82	
Books, newspapers and magazines - expenditure per person	110	2.44	3.11	78	
Books - expenditure per person	42	0.93	1.18	79	
Newspapers and magazines - expenditure per person	68	1.51	1.93	78	
Clothing and footwear - expenditure per person	631	14.00	15.60	90	
Footwear - expenditure per person	79	1.75	1.96	89	
Clothing - expenditure per person	552	12.25	13.64	90	
Furniture, floor coverings and household textiles - expenditure per person	396	8.79	8.36	105	
Furniture and floor coverings - expenditure per person	301	6.68	6.36	105	
Household textiles and soft furnishings - expenditure per person	94	2.09	2.01	104	
Audio-visual equipment and other durables - expenditure per person	547	12.14	10.25	118	
Domestic appliances - expenditure per person	110	2.44	2.31	106	
Audio-visual, photographic and optical goods - expenditure per person	420	9.32	7.64	122	
Telephone and fax equipment - expenditure per person	17	0.38	0.30	125	
Hardware and DIY supplies - expenditure per person	285	6.32	5.93	107	
China, glass and hardware - expenditure per person	153	3.39	3.27	104	
DIY and decorators' supplies - expenditure per person	132	2.93	2.66	110	
Other goods - expenditure per person	1,015	22.52	20.25	111	
Chemists' goods - expenditure per person	330	7.32	7.06	104	

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02 June 2005

Area: WD6 1					
Comparison Area: Great Britain					
Description	Value	Area %	Comparison Area %	Index	Index
Jewellery, watches and clocks - expenditure per person	75	1.66	1.58	105	
Non-durable household goods - expenditure per person	59	1.31	1.26	104	
Bicycles - expenditure per person	20	0.44	0.40	110	
Recreational and other miscellaneous goods - expenditure per person	532	11.80	9.95	119	
Convenience goods - expenditure per person	1,650	36.61	39.69	92	
Comparison goods - expenditure per person	2,857	63.39	60.31	105	
Total goods - expenditure per person	4,507	100.00	100.00	113	

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Expenditure Person WD6 5 Area Profile Report



Project: Profile Report
Prepared For: CB Richard Ellis Ltd
Prepared By: MapInfo Ltd

Area: WD6 5
Comparison Area: Great Britain

Description	Value	Area %	Comparison Area %	Index	Index
2001 Expenditure Estimates					
Population and household counts					
Usually resident population 2001	27,534	100.00	100.00	100	
Consumer retail expenditure estimates					
Per person					
Food - expenditure per person	1,111	24.93	25.70	97	
Alcoholic drink - expenditure per person	155	3.48	4.62	75	
Tobacco - expenditure per person	221	4.96	6.18	80	
Books, newspapers and magazines - expenditure per person	101	2.27	3.11	73	
Books - expenditure per person	38	0.85	1.18	72	
Newspapers and magazines - expenditure per person	63	1.41	1.93	73	
Clothing and footwear - expenditure per person	582	13.06	15.60	84	
Footwear - expenditure per person	78	1.64	1.96	84	
Clothing - expenditure per person	509	11.42	13.64	84	
Furniture, floor coverings and household textiles - expenditure per person	399	8.95	8.36	107	
Furniture and floor coverings - expenditure per person	303	6.80	6.36	107	
Household textiles and soft furnishings - expenditure per person	96	2.15	2.01	107	
Audio-visual equipment and other durables - expenditure per person	564	12.65	10.25	123	
Domestic appliances - expenditure per person	111	2.49	2.31	108	
Audio-visual, photographic and optical goods - expenditure per person	437	9.80	7.64	128	
Telephone and fax equipment - expenditure per person	17	0.38	0.30	127	
Hardware and DIY supplies - expenditure per person	292	6.55	5.93	111	
China, glass and hardware - expenditure per person	156	3.50	3.27	107	
DIY and decorators' supplies - expenditure per person	136	3.05	2.66	115	
Other goods - expenditure per person	1,032	23.15	20.25	114	
Chemists' goods - expenditure per person	322	7.22	7.06	102	

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02 June 2005

Area: WD6 5
 Comparison Area: Great Britain

Description	Value	Area %	Comparison Area %	Index	Index
Jewellery, watches and clocks - expenditure per person	76	1.71	1.58	108	
Non-durable household goods - expenditure per person	60	1.35	1.26	107	
Bicycles - expenditure per person	21	0.47	0.40	117	
Recreational and other miscellaneous goods - expenditure per person	559	12.41	9.95	125	
Convenience goods - expenditure per person	1,610	36.12	39.69	91	
Comparison goods - expenditure per person	2,847	63.88	60.31	106	
Total goods - expenditure per person	4,457	100.00	100.00	112	

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02 June 2005

Appendix D

Retail needs: Watford update study

WATFORD 'REASN' MODEL 2005

Project: Watford Retail Study 2005
 Doc: Watford REASN Model 2005 v5
 Latest Revision: 09/03/2007
 Job No: 257603
 Client: Watford Borough Council

TABLE 1
 CATCHMENT AREA POPULATION FORECASTS

Zone	Postcodes	2001	2005	2006	2011	2016	2021
1	AL1 1, AL1 2, AL3 4, AL2 1	23,479	23987	24,060	24,467	24,937	25,372
2	AL2 2, AL2 3, WD5 0	24,696	25452	25,564	26,195	26,903	27,562
3	HP3 8, HP3 9, HP2 4	31,174	32366	32,594	33,035	33,192	33,505
4	WD6 4, WD6 5, WD7 7, WD7 8, WD7 9	27,445	28376	28,499	29,293	30,166	30,986
5	EN5 3, WD6 1, WD6 2, WD6 3	21,914	22887	22,839	23,557	24,313	25,044
6	NW7 3, NW7 4, HA8 8	24,888	25812	26,043	27,223	28,354	29,518
7	HA7 4, NW7 2, HA8 9	24,203	25298	25,525	26,669	27,821	29,074
8	HA8 0, NW9 5	22,835	23556	23,758	24,733	25,670	26,632
9	HA7 2, HA8 6, HA8 7	22,180	23042	23,229	24,194	25,172	26,141
10	WD23 1, WD23 3, WD23 4, HA7 3	24,926	25694	25,876	26,770	27,726	28,639
11	WD19 6, WD19 7, HA5 4, WD19 5	24,955	25767	25,937	26,879	27,892	28,858
12	HA6 1, HA6 2, HA6 3	22,258	23236	23,426	24,429	25,388	26,376
13	HA3 5, HA3 6, HA3 7	25,278	26294	26,502	27,578	28,677	29,761
14	WD18 8, WD18 9, WD3 1, WD3 5, WD3 7, WD3 8, WD3 9	23,693	24630	24,781	25,639	26,560	27,439
15	WD4 8, WD4 9, WD3 6, WD3 3, WD3 4	26,301	27325	27,496	28,500	29,547	30,565
16	WD17 1, WD17 2, WD17 3, WD17 4, WD23 1612	20,763	21094	21,190	21,631	21,931	22,312
17	WD18 C, WD18 6, WD18 7, WD19 4	28,601	28997	29,067	29,384	29,746	30,078
18	WD24 4, WD24 5, WD24 6, WD24 7	20,146	20377	20,421	20,671	20,751	20,911
19	WD25 C, WD25 7, WD25 8, WD25 9	25,647	26045	26,089	26,441	26,840	27,201
TOTAL		464,981	479,983	482,858	498,006	513,683	528,675

SOURCE: Mapinfo Area Profile Report for Watford

TABLE 2a
CATCHMENT AREA RETAIL EXPENDITURE FORECASTS (2001 prices)

PER CAPITA EXPENDITURE IN		2001								
		(£)								
Convenience Goods		1,706								
Comparison Goods		2,788								
GROWTH IN PER CAPITA RETAIL EXPENDITURE:										
Convenience Goods:	4.21	% 2001-03	0.90 %pa 2003-2021							
Comparison Goods:	13.43	% 2001-03	3.70 %pa 2003-2021							
PER CAPITA EXPENDITURE IN		2005	2006	2011	2016	2021				
Convenience Goods (£)		1,810	1,826	1,910	1,997	2,089				
Comparison Goods (£)		3,401	3,527	4,229	5,072	6,082				
CATCHMENT TOTAL RETAIL EXPENDITURE										
Zone	CONVENIENCE GOODS					COMPARISON GOODS				
	2005 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2005 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	43,416	43,927	46,750	49,810	53,000	81,974	84,815	103,474	128,470	154,306
2	46,067	46,668	50,031	53,731	57,577	86,567	90,119	110,782	136,426	167,631
3	56,580	58,526	64,814	72,284	76,297	110,066	114,946	143,515	178,480	222,819
4	51,267	52,047	55,948	62,256	64,729	96,327	100,505	123,884	152,990	186,456
5	47,063	47,750	49,992	48,664	52,375	77,153	80,544	89,626	123,306	152,313
6	46,719	47,591	51,994	55,635	61,661	87,781	91,843	115,130	143,600	179,623
7	46,786	46,615	50,074	55,671	60,526	86,033	90,017	112,871	141,087	176,219
8	42,636	43,389	47,236	51,274	55,634	80,109	83,785	104,599	130,186	161,975
9	41,705	42,422	46,209	50,280	54,603	78,361	81,920	102,320	127,662	159,989
10	46,505	47,239	51,129	55,361	59,826	87,380	91,262	113,214	140,615	174,161
11	46,637	47,338	51,337	55,713	60,282	87,628	91,470	113,675	141,457	176,509
12	42,036	42,782	46,658	50,711	55,099	79,020	82,614	103,313	128,758	160,418
13	47,561	48,399	52,672	57,281	62,169	80,420	83,462	116,631	145,438	181,007
14	44,679	45,266	48,969	53,052	57,319	83,761	87,393	108,431	134,702	166,861
15	49,457	50,215	54,433	59,018	63,850	92,626	96,966	120,530	149,850	186,806
16	38,179	38,644	41,123	43,806	46,503	71,736	74,623	91,067	111,226	136,897
17	52,484	53,084	56,121	59,416	62,832	98,612	102,508	124,269	150,866	182,931
18	36,862	37,294	39,289	41,449	43,682	69,298	72,017	86,997	105,241	127,178
19	47,141	47,663	50,600	53,611	56,622	88,573	92,041	111,022	136,122	165,433
TOTALS	868,754	881,823	951,161	1,025,661	1,104,796	1,632,315	1,702,850	2,106,139	2,604,666	3,216,566

SOURCES: MapInfo Area Profile Report for Watford
MapInfo Information Brief 04/02
Table 1b for population.

NOTES: Expenditure on Special Forms of Trading excluded.
SFT excluded at 1.0% for convenience goods
SFT excluded at 7.0% for comparison goods

Table 2b
CATCHMENT AREA COMPARISON GOODS EXPENDITURE BY GOODS CATEGORIES 2005 (2001 Prices)

Per Capita Expenditure	Comparison Goods Categories										TOTAL	
	Clothing & footwear	Furniture/ floorwrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medical & beauty goods	All other comparison gds	TOTAL			
Expenditure in 2001 including SFT	£	£	£	£	£	£	£	£	£	£	£	£
Exclusion for SFT (%)	7	7	7	7	7	7	7	7	7	7	7	7
Expenditure in 2001 excluding SFT	£	£	£	£	£	£	£	£	£	£	£	£
Per capita expenditure 2005:												
Catchment Zones:												
1	19,837	8,463	2,612	3,102	11,837	11,157	9,714	14,857	81,579	14,857	14,857	81,579
2	21,048	8,979	2,772	3,291	12,560	11,838	10,308	15,765	86,561	15,765	15,765	86,561
3	26,765	11,418	3,525	4,185	15,971	15,053	13,107	20,047	110,072	20,047	20,047	110,072
4	23,424	9,993	3,085	3,663	13,978	13,174	11,471	17,544	96,332	17,544	17,544	96,332
5	18,762	8,004	2,471	2,934	11,195	10,552	9,188	14,052	77,157	14,052	14,052	77,157
6	21,346	9,106	2,811	3,338	12,737	12,005	10,453	15,988	87,785	15,988	15,988	87,785
7	20,921	8,925	2,755	3,272	12,484	11,766	10,245	15,668	86,037	15,668	15,668	86,037
8	19,480	8,311	2,565	3,046	11,624	10,956	9,540	14,590	80,113	14,590	14,590	80,113
9	19,055	8,129	2,509	2,980	11,371	10,717	9,332	14,272	78,365	14,272	14,272	78,365
10	21,248	9,065	2,798	3,323	12,679	11,951	10,406	15,915	87,384	15,915	15,915	87,384
11	21,309	9,091	2,808	3,332	12,715	11,984	10,435	15,960	87,632	15,960	15,960	87,632
12	19,216	8,195	2,530	3,005	11,466	10,807	9,410	14,392	79,024	14,392	14,392	79,024
13	21,745	9,277	2,863	3,400	12,975	12,230	10,649	16,286	89,425	16,286	16,286	89,425
14	20,369	8,689	2,682	3,185	12,154	11,456	9,975	15,255	83,765	15,255	15,255	83,765
15	22,597	9,640	2,976	3,534	13,484	12,709	11,066	16,925	92,931	16,925	16,925	92,931
16	17,444	7,442	2,297	2,728	10,408	9,811	8,543	13,065	71,740	13,065	13,065	71,740
17	23,980	10,230	3,158	3,750	14,309	13,487	11,743	17,960	98,617	17,960	17,960	98,617
18	16,851	7,189	2,219	2,635	10,055	9,478	8,252	12,621	69,301	12,621	12,621	69,301
19	21,539	9,189	2,836	3,368	12,852	12,114	10,548	16,132	88,576	16,132	16,132	88,576
TOTAL	396,936	169,338	52,270	62,071	236,857	223,245	194,384	297,297	1,632,396	297,297	297,297	1,632,396

SOURCE:
Mapinfo Area Profile Report for Watford
Mapinfo Goods based retail expenditure estimates 04/02
Table 1 for population.
Table 2a for growth in expenditure 2001-05.

WATFORD FORECASTS

TABLE 3a
WATFORD'S DRAW UPON THE CATCHMENT AREA.

SCENARIO: 1 - Baseline
Market Shares indicated by Household Interview Survey 2005 remain unchanged throughout forecasting period.

Factor applied to survey derived market shares 85 %

Catchment zone	PROPORTION OF EXPENDITURE ATTRACTED TO WATFORD									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2005 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)	2005 (%)	2006 (%)	2011 (%)	2016 (%)	2021 (%)
1	38	38	38	38	38	47	47	47	47	47
2	65	65	65	65	65	79	79	79	79	79
3	33	33	33	33	33	35	35	35	35	35
4	31	31	31	31	31	49	49	49	49	49
5	66	66	66	66	66	63	63	63	63	63
6	38	39	39	39	39	44	44	44	44	44
7	64	64	64	64	64	72	72	72	72	72
8	41	41	41	41	41	60	60	60	60	60
9	60	60	60	60	60	62	62	62	62	62
10	48	48	48	48	48	63	63	63	63	63
11	48	48	48	48	48	71	71	71	71	71
12	54	54	54	54	54	74	74	74	74	74
13	48	48	48	48	48	61	61	61	61	61
14	28	28	28	28	28	63	63	63	63	63
15	43	43	43	43	43	66	66	66	66	66
16	74	74	74	74	74	79	79	79	79	79
17	63	63	63	63	63	69	69	69	69	69
18	71	71	71	71	71	78	78	78	78	78
19	66	66	66	66	66	83	83	83	83	83

SOURCE: Tables 3(i) and 3(ii)

TABLE 4a
FORECAST RETAIL SALES IN WATFORD (2001 prices)

SCENARIO: As Table 3a

Catchment zone	RETAIL SALES IN WATFORD BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2005 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2005 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	16,498	16,685	17,758	18,928	20,140	35,340	36,063	48,633	59,441	72,528
2	39,244	39,334	32,820	34,926	37,426	60,380	71,194	87,519	107,776	132,428
3	19,931	19,643	21,888	23,197	25,165	38,523	40,231	50,233	62,468	77,707
4	15,893	16,134	17,344	18,679	20,066	47,200	49,241	60,709	74,965	92,343
5	22,565	22,940	24,746	26,710	28,773	45,697	50,743	64,764	77,883	95,857
6	18,220	18,649	20,278	22,066	24,048	35,834	40,411	50,657	63,272	78,996
7	29,305	29,834	32,823	35,595	38,797	61,844	64,812	81,267	101,590	128,877
8	17,481	17,769	19,366	21,022	22,810	48,085	50,271	62,759	78,113	97,165
9	25,023	25,453	27,725	30,188	32,786	48,584	50,790	63,438	79,157	98,673
10	22,768	23,167	25,053	27,137	29,315	55,549	57,495	71,325	88,587	109,734
11	22,386	22,736	24,642	26,742	28,936	62,716	64,943	80,709	100,424	124,611
12	22,710	23,102	25,195	27,384	29,753	58,475	61,135	76,482	95,287	118,708
13	22,843	23,232	25,283	27,495	29,841	54,545	57,012	71,145	88,717	110,411
14	12,482	12,672	13,711	14,855	16,049	62,775	65,057	81,311	100,662	125,135
15	21,267	21,592	23,406	25,378	27,455	61,331	63,999	79,560	98,907	122,681
16	28,253	28,696	30,431	32,416	34,490	66,671	69,852	87,935	109,888	137,201
17	33,065	33,443	35,356	37,432	39,684	68,043	70,730	88,745	109,993	136,222
18	26,186	26,479	27,895	29,429	31,014	64,745	66,893	83,728	103,140	126,477
19	31,113	31,458	33,330	35,383	37,632	73,516	76,394	92,813	112,984	137,511
TOTALS	437,372	443,835	478,053	514,933	553,869	1,035,628	1,080,173	1,334,683	1,649,323	2,035,060

SOURCE: Tables 2 & 3a

Table 6a (iii)
RETAIL DEVELOPMENT COMPLETED AND DEMOLISHED
APRIL 2005 - MARCH 2007

Development	Gross	Net convenience	Net comparison	Gain/Loss (completed/demolished)
25C High Street	297	223		Gain
Cassio Garage	362	272		Gain
Colne Valley Retail Park			836	Gain
Primark			1493	Gain
Sub-total:		494	2329	
1-3 Derby Road	1575		1181	Loss
78 Whippendell Road	46	35		Loss
Sub-total:		35	1181	
Total gain:		460	1148	

Source: Watford District Council March 2007

TABLE 3a
FUTURE SHOP FLOORSPACE CAPACITY IN WATFORD

SCENARIO: As Table 3a										
Growth in sales per sq m from shop floorspace existing in 2005 (at 2007 prices)										
Convenience Goods: 0.60 % pa 2005-2021						Comparison Goods: 1.5 % pa 2005-2021				
	CONVENIENCE GOODS					COMPARISON GOODS				
	2005	2006	2011	2015	2021	2005	2006	2011	2015	2021
Residents' Spending (£000)	437,372	443,535	478,053	514,933	553,869	1,035,628	1,085,173	1,354,663	1,549,329	2,035,090
Plus visitors' spending (%)	0	0	0	0	0	7	7	7	7	7
Total spending (£000)	437,372	443,535	478,053	514,933	553,869	1,108,122	1,155,785	1,428,110	1,764,776	2,177,536
Existing shop floorspace (sq m net)	26,276	26,276	26,276	26,276	26,276	147,279	147,279	147,279	147,279	147,279
Sales per sq m net F	16,645	16,645	16,645	16,645	16,645	7,524	7,827	8,227	8,863	9,548
Sales from extra floorspace (£000)	437,372	437,372	437,372	437,372	437,372	1,108,122	1,124,744	1,211,668	1,305,311	1,406,191
Residual spending to support new shops (£000)	0	6,463	46,681	77,960	116,496	0	31,041	210,442	459,485	771,345
Sales per sq m net in new shops (£)	10,050	10,050	10,050	10,050	10,050	7,524	7,827	8,227	8,863	9,548
Supportable capacity for new shop floorspace (sq m net)	0	646	4,068	7,756	11,650	0	4,065	26,303	51,842	60,782
Floorspace gain since November 2005	0	460	460	460	460	0	1,148	1,148	1,148	1,148
Supportable capacity for new shop floorspace (sq m net)	0	187	3,608	7,295	11,199	0	2,917	25,461	50,694	79,640

SOURCES: Table 4a, 5a(i), 5a(ii) and 5a(iii) CB Richard Ellis

Appendix E

Retail needs: Welwyn and Hatfield study

Table 1B : Population Projections

Zone Area	2001	2007	2011	2016	2021
1 - Welwyn Garden City	43,750	46,815	48,148	49,702	51,555
2 - Hatfield	36,945	39,533	40,659	41,971	43,536
3 - Welwyn North	23,811	24,804	25,752	26,808	27,961
4 - St Albans (Rural)	25,906	26,272	26,778	27,329	27,878
5 - Potters Bar	28,093	29,339	30,256	31,306	32,407
6 - Hertford	21,180	21,890	23,031	24,307	25,613
7 - Stevenage (Urban)	76,917	78,334	79,027	79,623	80,782
8 - Harpenden	24,233	24,576	25,049	25,565	26,079
9 - St Albans (Urban)	56,891	57,698	58,809	60,020	61,226
	337,726	349,261	357,508	366,632	377,037

Sources:

East of England Regional Assembly Group 3 Dwellings Based Forecasts
 Experian 2001 Population Census 2001
 Hertfordshire County Council

Table 2B: Convenience Goods Expenditure Per Capita (2005 Prices)

Expenditure Per Capita	2007	2011	2015	2021	Growth 2007-2011	Growth 2007-2016	Growth 2007-2021
1 - Welwyn Garden City	£1,547	£1,578	£1,647	£1,705	2.0%	6.5%	10.2%
2 - Hatfield	£1,506	£1,536	£1,603	£1,660	2.0%	6.4%	10.2%
3 - Welwyn North	£1,795	£1,831	£1,911	£1,979	2.0%	6.5%	10.3%
4 - St Albans (Rural)	£1,655	£1,688	£1,762	£1,824	2.0%	6.5%	10.2%
5 - Potters Bar	£1,667	£1,700	£1,774	£1,837	2.0%	6.4%	10.2%
6 - Hertford	£1,704	£1,738	£1,814	£1,879	2.0%	6.5%	10.3%
7 - Stevenage (Urban)	£1,527	£1,557	£1,626	£1,683	2.0%	6.5%	10.2%
8 - Harpenden	£1,691	£1,725	£1,801	£1,865	2.0%	6.5%	10.3%
9 - St Albans (Urban)	£1,688	£1,722	£1,796	£1,861	2.0%	6.5%	10.2%

Sources:

Experian local estimates for 2005 convenience goods expenditure per capita
 (Excluding special forms of trading - 1.8% in 2006, 2.3% in 2011 and beyond)
 Experian Business Strategies - recommended forecast growth rates
 (0.6% per annum between 2005 to 2010 and 0.9% per annum between 2010 and 2015 and 0.7% between 2015 to 2025)

Table 3B: Total Available Convenience Goods Expenditure (£M - 2005 Prices)

Zone	2007	2011	2016	2021	Growth 2007-2011	Growth 2007-2016	Growth 2007-2021
1 - Welwyn Garden City	£72.42	£75.98	£81.86	£87.90	4.9%	13.0%	21.4%
2 - Hatfield	£59.54	£62.45	£67.28	£72.27	4.9%	13.0%	21.4%
3 - Welwyn North	£44.52	£47.15	£51.23	£55.34	5.9%	15.1%	24.3%
4 - St Albans (Rural)	£43.48	£45.20	£48.15	£50.85	4.0%	10.8%	17.0%
5 - Potters Bar	£48.91	£51.43	£55.54	£59.53	5.2%	13.6%	21.7%
6 - Hertford	£37.30	£40.03	£44.09	£48.13	7.3%	18.2%	29.0%
7 - Stevenage (Urban)	£119.62	£123.04	£129.47	£135.98	2.9%	8.2%	13.7%
8 - Harpenden	£41.56	£43.21	£46.04	£48.64	4.0%	10.8%	17.0%
9 - St Albans (Urban)	£97.39	£101.27	£107.92	£113.94	4.0%	10.8%	17.0%
Total	£564.74	£589.77	£631.58	£672.55	4.4%	11.8%	19.1%

Sources: Table 1B and Table 2B

Table 4B: Convenience Shopping Penetration Rates 2007

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Welwyn Garden City									
Sainsbury's, Church Road	8%	0%	3%	1%	0%	0%	0%	0%	0%
Waitrose, Bridge Road	13%	2%	13%	2%	1%	2%	0%	0%	0%
Morrisons, Black Fan Road	24%	2%	5%	0%	1%	7%	0%	1%	0%
Other Convenience Stores/Shops	0%	1%	4%	0%	0%	1%	1%	0%	1%
	51%	5%	25%	3%	2%	10%	1%	1%	1%
Hatfield									
Asda, Town Centre	5%	31%	0%	8%	1%	2%	0%	1%	3%
Tesco, Mount Pleasant	25%	35%	14%	15%	1%	4%	1%	6%	4%
Other Convenience Stores/Shops	0%	8%	0%	0%	0%	0%	0%	0%	0%
	30%	72%	14%	23%	2%	6%	1%	7%	7%
Other Welwyn/Hatfield									
Local shopping facilities	16%	11%	17%	0%	3%	0%	0%	0%	0%
Welwyn Hatfield Sub-Total	97%	88%	55%	26%	7%	16%	2%	8%	8%
St Albans	1%	7%	1%	55%	11%	0%	0%	2%	80%
Stevenage	1%	1%	29%	0%	1%	10%	89%	1%	0%
Potters Bar	0%	3%	0%	0%	66%	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%	62%	0%	0%	0%
Harpenden	0%	0%	4%	7%	0%	0%	0%	81%	1%
Other Outflow	1%	1%	8%	11%	15%	11%	9%	5%	10%
Other Sub-Total	3%	12%	44%	74%	93%	84%	98%	92%	92%
Market Share Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Market shares based on NEMS household survey 2007

Table 5B: Convenience Expenditure 2007 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total Expend
Expenditure 2007	£72.42	£68.54	£44.62	£43.48	£48.91	£37.30	£119.62	£41.56	£97.39	£564.74
Welwyn Garden City										
Sainsbury's, Church Road	£6.79	£0.00	£1.34	£0.43	£0.20	£0.60	£0.00	£0.00	£0.00	£7.56
Waitrose, Bridge Road	£9.41	£1.19	£5.72	£0.87	£0.49	£0.75	£0.00	£0.00	£0.00	£18.66
Morrisons, Black Fan Road	£17.98	£1.19	£2.23	£0.00	£0.49	£2.61	£0.00	£0.42	£0.00	£24.31
Other convenience stores/shops	£4.35	£0.60	£1.73	£0.00	£0.20	£0.57	£1.20	£0.00	£0.07	£9.26
£36.94	£2.98	£11.13	£1.50	£0.98	£3.73	£4.52	£1.20	£0.42	£0.07	£59.64
Hatfield										
Asda, Town Centre	£3.62	£13.46	£0.00	£3.48	£0.49	£0.75	£0.00	£0.42	£2.92	£20.13
Tesco, Mount Pleasant	£18.11	£23.84	£5.23	£6.52	£0.40	£1.49	£1.20	£2.48	£3.90	£61.27
Other convenience stores/shops	£0.00	£3.67	£0.00	£0.00	£0.20	£0.00	£0.00	£0.00	£0.00	£3.67
£21.73	£42.97	£5.23	£10.00	£0.98	£2.24	£1.20	£2.91	£5.82	£6.82	£94.97
Other Welwyn/Hatfield										
Local shopping facilities	£11.69	£6.55	£7.57	£0.00	£1.47	£0.00	£0.00	£0.00	£0.00	£27.17
£70.25	£52.39	£24.93	£11.30	£3.42	£5.97	£2.39	£3.32	£7.79	£181.78	
Welwyn Hatfield Sub-Total										
St Albans	£3.72	£4.17	£0.45	£23.31	£0.39	£0.00	£0.00	£0.39	£77.91	£110.39
Stevenage	£0.72	£0.60	£12.81	£0.00	£0.49	£3.73	£106.46	£0.42	£0.00	£126.32
Potters Bar	£0.00	£1.79	£0.00	£0.00	£2.28	£0.37	£0.00	£0.00	£0.00	£5.44
Watford	£0.00	£0.00	£0.00	£0.43	£0.00	£0.00	£0.00	£0.00	£0.07	£1.41
Luton	£0.00	£0.00	£0.89	£0.00	£0.00	£0.00	£0.00	£1.25	£0.00	£2.14
Hertford	£0.00	£0.00	£0.00	£0.00	£0.00	£23.13	£0.00	£0.00	£0.00	£23.13
Hargenden	£0.00	£0.00	£1.76	£3.04	£0.00	£0.00	£0.00	£3.66	£0.37	£9.46
Other outflow	£0.72	£0.00	£3.56	£4.78	£7.34	£4.10	£0.77	£2.08	£3.74	£43.69
£2.17	£7.14	£15.56	£32.18	£45.49	£31.33	£117.22	£36.23	£89.50	£382.55	
TOTAL	£72.42	£68.54	£44.62	£43.48	£48.91	£37.30	£119.62	£41.56	£97.39	£564.74

Source: Table 2B and 3B

Table 6B: Convenience Shopping Penetration Rates 2011-2021

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Welwyn Garden City									
Sainsbury's, Church Road	12%	1%	6%	2%	1%	1%	0%	0%	0%
Waitrose, Bridge Road	15%	2%	15%	2%	2%	2%	0%	0%	0%
Morrisons, Black Fan Road	20%	2%	4%	0%	1%	7%	0%	1%	0%
Other Convenience Stores/Shops	6%	1%	3%	0%	0%	1%	1%	0%	1%
53%	6%	30%	4%	4%	11%	1%	1%	1%	1%
Hatfield									
Asda, Town Centre	4%	33%	0%	8%	1%	2%	0%	1%	3%
Tesco, Mount Pleasant	23%	33%	12%	14%	1%	4%	1%	6%	4%
Other Convenience Stores/Shops	0%	6%	0%	0%	0%	0%	0%	0%	0%
27%	69%	12%	22%	2%	6%	1%	7%	7%	7%
Other Welwyn/Hatfield									
Local shopping facilities	17%	13%	17%	1%	5%	0%	0%	0%	0%
97%	86%	59%	27%	11%	17%	2%	8%	9%	
Welwyn Hatfield Sub-Total									
St Albans	1%	7%	1%	54%	11%	0%	0%	2%	80%
Stevenage	1%	1%	26%	0%	1%	10%	85%	1%	0%
Potters Bar	0%	0%	0%	0%	64%	1%	0%	0%	0%
Watford	0%	0%	0%	1%	0%	0%	0%	0%	1%
Luton	0%	0%	3%	0%	0%	0%	0%	3%	0%
Hertford	0%	0%	0%	0%	0%	61%	0%	0%	0%
Hargenden	0%	0%	4%	7%	0%	0%	0%	81%	1%
Other Outflow	1%	1%	8%	11%	13%	11%	9%	6%	10%
3%	12%	41%	73%	89%	83%	96%	92%	92%	
Market Share Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Market shares based on NEMS household survey 2007
NLP

Table 7B: 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	£75.99	£62.45	£47.15	£45.20	£51.43	£40.03	£123.04	£43.21	£101.27	£589.77
Welwyn Garden City										
Sainsbury's, Church Road	£3.12	£0.62	£5.77	£0.50	£0.51	£0.40	£0.00	£0.00	£0.00	£15.33
Waitrose, Bridge Road	£11.40	£1.25	£7.07	£0.00	£1.03	£0.80	£0.00	£0.00	£0.00	£22.45
Morrisons, Black Fan Road	£15.20	£1.25	£1.86	£0.00	£0.51	£2.80	£0.00	£0.43	£0.00	£22.09
Other convenience stores/shops	£4.56	£0.62	£1.41	£0.00	£0.60	£0.43	£1.23	£0.00	£1.01	£9.24
Other Welwyn/Hatfield	£40.27	£3.75	£14.15	£1.61	£2.06	£4.40	£1.23	£0.43	£1.01	£69.10
Hatfield										
Asda, Town Centre	£5.04	£18.74	£0.00	£3.92	£0.51	£0.80	£0.00	£3.43	£3.04	£30.18
Tesco, Mount Pleasant	£17.47	£20.81	£5.56	£6.33	£3.51	£1.80	£1.23	£2.59	£4.05	£60.05
Other convenience stores/shops	£0.00	£3.75	£0.00	£0.00	£3.00	£0.00	£0.00	£5.50	£3.00	£9.75
Other Welwyn/Hatfield	£20.51	£43.00	£5.66	£9.94	£1.03	£2.40	£1.23	£3.02	£7.09	£93.98
Other Welwyn/Hatfield										
Local shopping facilities	£12.92	£8.12	£8.02	£1.40	£2.57	£0.00	£0.00	£0.00	£0.00	£22.07
Welwyn Hatfield Sub-Total	£73.70	£54.96	£27.82	£12.20	£5.66	£6.80	£2.46	£3.45	£8.10	£195.18
St Albans										
St Albans	£0.78	£4.37	£0.47	£24.41	£5.68	£0.50	£0.00	£0.85	£81.01	£117.55
Stevanage	£0.76	£0.62	£12.26	£0.00	£3.51	£4.00	£109.51	£0.43	£0.00	£128.10
Potters Bar	£0.00	£1.67	£0.00	£0.00	£32.92	£0.40	£0.00	£0.00	£0.00	£35.19
Watford	£0.00	£0.00	£0.00	£0.45	£3.00	£0.00	£0.00	£0.00	£1.01	£1.46
Luton	£0.00	£0.00	£0.94	£0.00	£3.00	£0.00	£0.00	£1.53	£0.00	£2.24
Hertford	£0.00	£0.00	£0.00	£0.00	£3.00	£24.42	£3.00	£0.00	£0.00	£24.42
Harpenden	£0.00	£0.00	£1.89	£5.16	£3.00	£0.00	£3.00	£36.00	£1.01	£41.06
Other outflow	£0.78	£0.62	£3.77	£4.67	£6.89	£4.40	£11.07	£2.15	£10.13	£44.58
Other Sub-Total	£22.26	£7.49	£19.33	£33.00	£45.78	£33.22	£120.53	£38.75	£93.17	£394.61
TOTAL	£75.99	£62.45	£47.15	£45.20	£51.43	£40.03	£123.04	£43.21	£101.27	£589.77

Source: Table 2B and 3B

Table 8B: 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	£81.85	£67.28	£51.23	£48.15	£55.54	£44.09	£129.47	£46.04	£107.92	£631.58
Welwyn Garden City										
Sainsbury's, Church Road	£3.82	£0.67	£4.10	£0.96	£0.56	£0.44	£0.00	£0.00	£0.00	£16.55
Waitrose, Bridge Road	£12.20	£1.25	£7.68	£0.96	£1.11	£0.80	£0.00	£0.00	£0.00	£24.26
Morrisons, Black Fan Road	£18.37	£1.25	£2.05	£0.00	£0.56	£3.09	£0.00	£0.46	£0.00	£23.87
Other convenience stores/shops	£4.91	£0.67	£1.54	£0.00	£0.00	£0.44	£1.29	£0.00	£1.08	£9.94
Other Welwyn/Hatfield	£43.30	£4.04	£15.37	£1.93	£2.22	£4.85	£1.29	£0.46	£1.08	£74.62
Hatfield										
Asda, Town Centre	£3.27	£20.19	£0.00	£3.95	£0.56	£0.88	£0.00	£0.46	£3.24	£32.45
Tesco, Mount Pleasant	£18.83	£22.20	£8.15	£6.74	£3.56	£1.76	£1.29	£2.76	£4.32	£64.61
Other convenience stores/shops	£5.00	£4.04	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.04
Other Welwyn/Hatfield	£22.10	£46.42	£8.15	£10.59	£1.11	£2.85	£1.29	£3.22	£7.55	£101.10
Other Welwyn/Hatfield										
Local shopping facilities	£13.32	£8.75	£8.71	£0.42	£2.78	£0.00	£0.00	£0.00	£0.00	£24.60
Welwyn Hatfield Sub-Total	£79.40	£59.21	£36.23	£13.00	£6.11	£7.60	£2.59	£3.65	£8.63	£210.33
St Albans										
St Albans	£0.62	£4.71	£0.57	£26.00	£6.11	£0.00	£0.00	£0.62	£86.33	£125.41
Stevanage	£0.62	£0.67	£13.30	£0.00	£0.56	£4.41	£115.23	£0.46	£0.00	£135.46
Potters Bar	£0.00	£2.02	£0.00	£0.00	£36.54	£0.44	£0.00	£0.00	£0.00	£39.00
Watford	£0.00	£0.00	£0.00	£0.48	£0.00	£0.00	£0.00	£0.00	£1.08	£1.56
Luton	£0.00	£0.00	£1.02	£0.00	£0.00	£0.00	£0.00	£1.58	£0.00	£2.41
Hertford	£0.00	£0.00	£0.00	£0.00	£0.00	£26.90	£0.00	£0.00	£0.00	£26.90
Harpenden	£0.00	£0.00	£2.05	£3.37	£0.00	£0.00	£0.00	£37.29	£1.08	£43.79
Other outflow	£0.62	£0.67	£4.10	£5.30	£7.22	£4.85	£11.65	£2.30	£10.79	£47.70
Other Sub-Total	£24.45	£8.67	£21.60	£36.15	£49.43	£36.60	£126.88	£42.36	£99.28	£421.23
TOTAL	£81.85	£67.28	£51.23	£48.15	£55.54	£44.09	£129.47	£46.04	£107.92	£631.58

Source: Table 2B and 3B

Table 9B: 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	£87.50	£72.27	£55.34	£50.85	£59.53	£48.13	£135.96	£48.64	£113.94	£672.58
Welwyn Garden City										
Sainsbury's, Church Road	£16.55	£5.72	£4.43	£1.02	£0.69	£0.46	£0.00	£0.00	£0.00	£17.79
Waitrose, Badge Road	£13.19	£1.45	£8.30	£1.02	£1.13	£0.95	£0.00	£0.00	£0.00	£23.13
Morrisons, Black Fan Road	£17.56	£1.45	£2.21	£0.00	£0.60	£3.37	£0.00	£0.49	£0.00	£25.69
Other convenience stores/shops	£5.27	£0.72	£1.65	£0.00	£0.00	£0.48	£1.35	£0.00	£1.14	£10.64
£46.69	£8.34	£16.60	£2.03	£2.38	£5.29	£1.36	£0.49	£1.14	£0.00	£72.55
Hatfield										
Asda, Town Centre	£3.52	£21.68	£0.00	£4.07	£0.60	£0.98	£0.00	£0.49	£3.42	£34.73
Tesco, Mount Pleasant	£20.22	£23.85	£5.64	£7.12	£0.00	£1.58	£1.36	£2.32	£4.56	£69.13
Other convenience stores/shops	£0.00	£4.34	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.34
£23.73	£49.87	£5.64	£11.19	£1.19	£2.58	£1.36	£2.32	£4.56	£7.98	£108.24
Other Welwyn/Hatfield										
Local shopping facilities	£14.94	£9.40	£9.41	£0.51	£2.88	£0.00	£0.00	£0.00	£0.00	£37.23
£86.26	£63.60	£32.65	£13.73	£6.53	£8.13	£2.72	£3.89	£9.12	£25.69	£225.69
Welwyn Hatfield Sub-Total										
St Albans	£0.86	£5.06	£0.55	£27.46	£6.55	£0.00	£0.00	£0.37	£31.15	£132.62
Stevenage	£0.55	£0.72	£14.39	£0.00	£0.60	£4.61	£121.00	£0.49	£0.00	£142.88
Potters Bar	£0.00	£2.17	£0.00	£0.00	£58.10	£0.48	£0.00	£0.00	£0.00	£43.75
Waltham	£0.00	£0.00	£0.00	£0.51	£0.00	£0.00	£0.00	£0.00	£1.14	£1.65
Luton	£0.00	£0.00	£1.11	£0.00	£0.00	£0.00	£0.00	£1.46	£0.00	£2.57
Hatfield	£0.00	£0.00	£0.00	£0.00	£0.00	£29.36	£0.00	£0.00	£0.00	£29.36
Harewood	£0.00	£0.00	£2.21	£3.56	£0.00	£0.00	£0.00	£39.40	£1.14	£46.31
Other outflow	£0.88	£0.72	£4.43	£3.59	£7.74	£3.29	£12.24	£2.43	£11.39	£50.72
Other Sub-Total	£2.64	£8.67	£22.69	£37.12	£62.98	£39.86	£133.24	£44.75	£104.83	£446.85
TOTAL	£87.90	£72.27	£55.34	£50.85	£59.53	£48.13	£135.96	£48.64	£113.94	£672.55

Source: Table 2B and 2C

Table 10B: Summary of Convenience Turnover/Floorspace Projections 2007 to 2021 (£Million)

Town	2007	2011	2016	2021
Available Expenditure in District				
Welwyn Garden City	£59.64	£69.10	£74.62	£80.22
Hatfield	£94.97	£93.98	£101.10	£108.24
Neighbourhood/Village Centres	£27.17	£32.07	£34.63	£37.23
Total	£181.78	£195.16	£210.35	£225.69
Benchmark Turnover of Existing Facilities				
Welwyn Garden City	£68.49	£69.32	£70.36	£71.42
Hatfield	£87.78	£88.84	£90.18	£91.54
Neighbourhood/Village Centres	£24.89	£25.19	£25.57	£25.96
Total	£181.16	£183.34	£186.11	£188.92
Commitments				
Welwyn Garden City	n/a	£22.31	£22.65	£22.99
Hatfield	n/a	£1.37	£1.39	£1.41
Neighbourhood/Village Centres	n/a	£6.20	£6.29	£6.39
Total	n/a	£29.88	£30.33	£30.79
Surplus Expenditure				
Welwyn Garden City	-£8.85	-£22.52	-£18.38	-£14.19
Hatfield	£7.19	£3.77	£9.53	£15.29
Neighbourhood/Village Centres	£2.28	£0.68	£2.77	£4.89
Total	£0.62	-£18.06	-£6.09	£5.99
Turnover Density for New Floorspace £ per Sq M				
Welwyn Garden City	£10,433	£10,559	£10,718	£10,880
Hatfield	£10,433	£10,559	£10,718	£10,880
Neighbourhood/Village Centres	£4,383	£4,436	£4,503	£4,571
Total	£8,770	£8,876	£8,983	£9,091
Sales Floorspace (Sq m Net)				
Welwyn Garden City	-848	-2,133	-1,715	-1,305
Hatfield	689	357	889	1,406
Neighbourhood/Village Centres	521	154	614	1,069
Total	362	-1,621	-212	1,170
Gross Floorspace (Sq M Gross)				
Welwyn Garden City	-1,212	-3,047	-2,450	-1,864
Hatfield	984	511	1,270	2,008
Neighbourhood/Village Centres	744	220	878	1,527
Total	516	-2,316	-303	1,672

Sources: Tables 1A, 2A, 5B to 9B

Table 1C: Comparison Goods Expenditure Per Capita (2005 Prices)

Expenditure Per Capita	2007	2011	2016	2021	Growth 2007-2011	Growth 2007-2016	Growth 2007-2021
1 - Welwyn Garden City	£2,896	£3,347	£3,952	£4,762	15.6%	36.5%	64.4%
2 - Hatfield	£2,856	£3,301	£3,897	£4,696	15.6%	36.4%	64.4%
3 - Welwyn North	£3,499	£4,044	£4,775	£5,753	15.6%	36.5%	64.4%
4 - St Albans (Rural)	£3,252	£3,758	£4,437	£5,347	15.6%	36.4%	64.4%
5 - Potters Bar	£3,193	£3,690	£4,357	£5,250	15.6%	36.5%	64.4%
6 - Hertford	£3,289	£3,802	£4,489	£5,409	15.6%	36.5%	64.5%
7 - Stevenage (Urban)	£2,861	£3,307	£3,904	£4,705	15.6%	36.5%	64.5%
8 - Harpenden	£3,298	£3,811	£4,500	£5,422	15.6%	36.4%	64.4%
9 - St Albans (Urban)	£3,293	£3,807	£4,494	£5,416	15.6%	36.5%	64.5%

Sources:

Experian local estimates for 2005 comparison goods expenditure per capita

(Excluding special forms of trading -6.5% in 2007, 7.8% in 2011 and beyond)

Experian Business Strategies - recommended forecast growth rates

(4.3% per annum between 2005 to 2010 and 3.3% per annum between 2010 and 2015, and 3.8% - 2015 to 2025)

Table 2C: Total Available Comparison Goods Expenditure (£M - 2005 Prices)

Zone	2007	2011	2016	2021	Growth 2007-2011	Growth 2007-2016	Growth 2007-2021
1 - Welwyn Garden City	£136.58	£161.15	£196.42	£245.50	18.9%	44.9%	81.1%
2 - Hatfield	£112.91	£134.21	£163.56	£204.44	18.9%	44.9%	81.1%
3 - Welwyn North	£86.79	£104.14	£128.01	£160.86	20.0%	47.5%	85.0%
4 - St Albans (Rural)	£85.44	£100.63	£121.26	£149.07	17.8%	41.9%	74.5%
5 - Potters Bar	£93.68	£111.84	£136.40	£170.14	19.2%	45.6%	81.6%
6 - Hertford	£72.00	£87.57	£109.12	£138.54	21.6%	51.6%	92.4%
7 - Stevenage (Urban)	£224.11	£261.34	£310.85	£380.08	16.6%	38.7%	69.6%
8 - Harpenden	£81.05	£95.46	£115.04	£141.40	17.8%	41.9%	74.5%
9 - St Albans (Urban)	£190.00	£223.88	£269.73	£331.60	17.8%	42.0%	74.5%
Total	£1,081.55	£1,280.03	£1,550.39	£1,921.63	18.4%	43.3%	77.7%

Sources:

Table 1B and Table 2B

Table 3C: Comparison Shopping Penetration Rates and Available Expenditure 2007

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expenditure
Expenditure 2007	£135.58	£112.91	£86.79	£95.44	£93.68	£72.00	£244.11	£91.05	£150.90	n/a	£1,081.85
Market Share											
Welwyn Garden City town centre	20%	24%	30%	14%	16%	20%	0%	91%	6%	15%	n/a
Hatfield town centre	7%	21%	1%	5%	4%	1%	0%	1%	1%	0%	n/a
Neighbourhood/Village Centres	1%	4%	3%	1%	2%	4%	0%	2%	2%	0%	n/a
Hatfield Galleria	3%	7%	3%	3%	2%	0%	1%	2%	1%	40%	n/a
Out-of-centre stores	9%	8%	3%	4%	5%	0%	0%	0%	0%	10%	n/a
Welwyn Hatfield Sub-Total	40%	64%	42%	27%	29%	26%	0%	26%	13%	n/a	n/a
St Albans	3%	10%	3%	4%	4%	1%	1%	17%	62%	n/a	n/a
Potters Bar	0%	1%	0%	0%	17%	0%	0%	0%	0%	n/a	n/a
Watford	1%	2%	0%	5%	3%	0%	1%	4%	9%	n/a	n/a
Luton	0%	1%	4%	4%	0%	0%	1%	19%	1%	n/a	n/a
London Colney	0%	4%	1%	7%	11%	1%	1%	2%	7%	n/a	n/a
Stevenage	10%	10%	30%	2%	2%	17%	91%	2%	1%	n/a	n/a
Other outflow	8%	8%	20%	8%	34%	5%	30%	30%	10%	n/a	n/a
Other Sub-Total	20%	39%	58%	74%	71%	74%	94%	74%	90%	n/a	n/a
TOTAL MARKET SHARE	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a	Total £M
Turnover £M											
Welwyn Garden City town centre	£81.38	£27.10	£27.77	£11.96	£14.93	£14.40	£11.21	£17.92	£11.40	£24.13	£241.32
Hatfield town centre	£9.43	£23.71	£0.87	£4.27	£3.75	£0.72	£0.00	£0.81	£1.90	£0.00	£45.52
Neighbourhood/Village Centres	£1.35	£4.52	£2.80	£0.85	£1.37	£2.88	£0.00	£1.62	£3.80	£0.00	£19.50
Hatfield Galleria	£4.07	£7.50	£2.60	£2.55	£1.97	£0.00	£2.24	£1.62	£1.90	£16.52	£41.29
Out-of-centre stores	£12.20	£9.63	£2.60	£3.42	£4.58	£0.72	£0.00	£0.00	£0.60	£3.83	£36.29
Welwyn Hatfield Sub-Total	£108.46	£72.26	£36.45	£23.07	£27.17	£18.72	£13.45	£21.07	£19.00	£44.28	£383.82
St Albans	£1.07	£1.29	£2.60	£49.15	£1.75	£1.72	£2.24	£13.78	£17.90	n/a	£195.40
Potters Bar	£0.00	£1.13	£0.00	£0.00	£11.99	£0.00	£0.00	£0.00	£0.00	n/a	£17.05
Watford	£1.26	£2.28	£0.00	£4.27	£2.81	£0.00	£2.24	£3.24	£17.10	n/a	£33.28
Luton	£0.00	£1.13	£3.47	£3.42	£0.00	£0.00	£2.24	£15.46	£1.50	n/a	£27.56
London Colney	£0.00	£4.52	£10.87	£6.98	£10.30	£0.72	£2.24	£1.62	£13.90	n/a	£35.65
Stevenage	£13.55	£11.28	£26.04	£1.71	£1.87	£12.24	£181.55	£1.82	£1.80	n/a	£251.75
Other outflow	£6.13	£9.03	£17.56	£8.39	£31.25	£39.60	£26.17	£24.52	£19.00	n/a	£176.29
Other Sub-Total	£27.12	£40.65	£50.34	£82.32	£55.51	£53.28	£110.67	£59.98	£171.00	n/a	£741.98
TOTAL TURNOVER	£135.58	£112.91	£86.79	£95.44	£93.68	£72.00	£224.11	£91.05	£190.00	£44.28	£1,125.33

Sources: Table 2C
NEMS Household and Street Surveys 2007

Table 4C: 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	£161.15	£134.21	£104.14	£100.63	£111.64	£87.57	£261.34	£95.48	£223.88	n/a	£1,280.03
Market Share											
Welwyn Garden City town centre	30%	27%	32%	14%	16%	20%	0%	91%	6%	15%	n/a
Hatfield town centre	9%	28%	2%	7%	5%	2%	0%	1%	1%	0%	n/a
Neighbourhood/Village Centres	1%	4%	3%	1%	2%	4%	0%	2%	2%	0%	n/a
Hatfield Galleria	3%	5%	3%	3%	2%	0%	1%	2%	1%	40%	n/a
Out-of-centre stores	8%	6%	3%	4%	5%	1%	0%	0%	0%	10%	n/a
Welwyn Hatfield Sub-Total	60%	65%	43%	29%	31%	27%	0%	26%	10%	n/a	n/a
St Albans	3%	9%	3%	4%	4%	1%	1%	17%	62%	n/a	n/a
Potters Bar	0%	1%	0%	0%	16%	0%	0%	0%	0%	n/a	n/a
Watford	1%	2%	0%	5%	3%	0%	1%	4%	9%	n/a	n/a
Luton	0%	1%	4%	4%	0%	0%	1%	19%	1%	n/a	n/a
London Colney	0%	4%	1%	7%	11%	1%	1%	2%	7%	n/a	n/a
Stevenage	10%	10%	30%	2%	2%	17%	91%	2%	1%	n/a	n/a
Other outflow	6%	8%	19%	8%	33%	5%	30%	30%	10%	n/a	n/a
Other Sub-Total	20%	35%	57%	71%	69%	73%	94%	74%	90%	n/a	n/a
TOTAL MARKET SHARE	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a	Total £M
Turnover £M											
Welwyn Garden City town centre	£95.00	£29.53	£30.33	£14.09	£17.96	£17.51	£13.07	£20.05	£13.43	£28.22	£292.19
Hatfield town centre	£14.50	£37.68	£2.36	£9.04	£6.70	£1.75	£0.00	£0.95	£2.24	£0.00	£72.85
Neighbourhood/Village Centres	£1.61	£5.37	£3.12	£1.01	£1.23	£3.53	£0.00	£1.51	£4.48	£0.00	£23.23
Hatfield Galleria	£4.80	£9.71	£3.12	£3.02	£2.24	£0.00	£2.61	£1.51	£2.24	£17.70	£44.47
Out-of-centre stores	£12.80	£8.05	£3.12	£4.03	£5.58	£0.88	£0.00	£0.60	£3.60	£3.84	£39.39
Welwyn Hatfield Sub-Total	£128.92	£87.24	£44.74	£29.18	£34.61	£23.64	£18.68	£24.82	£22.39	£49.84	£481.11
St Albans	£4.83	£12.03	£3.12	£45.28	£4.47	£0.00	£2.61	£16.23	£19.81	n/a	£228.51
Potters Bar	£0.00	£1.41	£0.00	£0.00	£17.86	£0.00	£0.00	£0.00	£0.00	n/a	£19.21
Watford	£1.61	£2.68	£0.00	£5.03	£3.35	£0.00	£2.61	£3.82	£20.15	n/a	£39.25
Luton	£0.00	£1.41	£4.17	£4.03	£0.00	£0.00	£2.61	£18.14	£2.74	n/a	£32.52
London Colney	£0.00	£5.37	£1.04	£7.04	£12.28	£0.88	£2.61	£1.91	£15.47	n/a	£48.81
Stevenage	£16.12	£13.42	£31.24	£2.21	£2.23	£14.88	£211.69	£1.91	£2.24	n/a	£295.74
Other outflow	£9.67	£10.74	£19.79	£6.05	£25.84	£47.25	£23.52	£28.54	£22.39	n/a	£206.92
Other Sub-Total	£32.23	£46.96	£59.36	£71.45	£77.03	£83.92	£248.68	£70.64	£201.50	n/a	£695.77
TOTAL TURNOVER	£161.15	£134.21	£104.14	£100.63	£111.64	£87.57	£261.34	£95.48	£223.88	£49.84	£1,329.88

Sources: Table 2C
NEMS Household and Street Surveys 2011

Table 6C: 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	£196.42	£163.56	£128.01	£121.28	£135.40	£109.12	£310.85	£115.04	£269.73	n/a	£1,609.39
Market Share											
Welwyn Garden City town centre	57%	22%	30%	13%	15%	19%	3%	21%	6%	10%	n/a
Hatfield town centre	9%	27%	2%	7%	6%	2%	0%	1%	1%	0%	n/a
Neighbourhood/Village Centres	1%	4%	3%	1%	2%	4%	0%	2%	2%	0%	n/a
Hatfield Galleria	3%	5%	3%	3%	2%	0%	1%	2%	1%	40%	n/a
Out-of-centre stores	8%	0%	3%	4%	5%	1%	0%	2%	0%	10%	n/a
Welwyn Hatfield Sub-Total	78%	64%	41%	28%	30%	26%	4%	26%	13%	n/a	n/a
St Albans	2%	0%	3%	43%	4%	1%	1%	17%	61%	n/a	n/a
Potters Bar	0%	1%	0%	0%	15%	0%	0%	0%	0%	n/a	n/a
Watford	1%	2%	0%	5%	3%	0%	1%	4%	9%	n/a	n/a
Luton	0%	1%	4%	4%	0%	0%	1%	15%	1%	n/a	n/a
London Colney	0%	4%	1%	7%	11%	1%	1%	2%	7%	n/a	n/a
Stevenage	12%	12%	34%	5%	4%	20%	30%	3%	2%	n/a	n/a
Other outflow	6%	7%	7%	8%	13%	5%	2%	25%	15%	7%	n/a
Other Sub-Total	22%	36%	59%	72%	70%	74%	96%	74%	90%	n/a	n/a
TOTAL MARKET SHARE	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a	n/a
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Turnover £M											
Welwyn Garden City town centre	£111.90	£36.64	£95.40	£15.76	£20.46	£20.75	£9.33	£24.15	£16.18	£32.58	£595.62
Hatfield town centre	£17.68	£24.15	£2.55	£8.43	£8.18	£2.19	£0.00	£1.15	£2.70	£0.00	£87.10
Neighbourhood/Village Centres	£1.85	£6.54	£3.84	£1.21	£2.73	£4.56	£0.00	£2.30	£5.36	£0.00	£28.35
Hatfield Galleria	£5.66	£8.18	£3.24	£3.64	£2.73	£0.00	£3.11	£2.30	£2.70	£21.59	£53.97
Out-of-centre stores	£15.71	£9.81	£9.84	£4.85	£5.82	£1.09	£0.00	£0.00	£0.00	£4.68	£46.81
Welwyn Hatfield Sub-Total	£153.21	£104.68	£122.48	£33.95	£40.92	£28.37	£12.43	£28.91	£26.57	£28.82	£541.76
St Albans	£3.82	£14.72	£3.34	£32.14	£5.46	£1.38	£3.11	£19.56	£164.54	n/a	£266.35
Potters Bar	£0.00	£1.64	£0.00	£0.00	£20.46	£0.00	£0.00	£0.00	£0.00	n/a	£22.10
Watford	£1.85	£3.27	£0.00	£6.63	£4.69	£0.00	£3.11	£4.60	£24.28	n/a	£47.38
Luton	£0.00	£1.64	£5.12	£4.85	£0.00	£0.00	£3.11	£21.66	£2.70	n/a	£36.27
London Colney	£0.00	£6.54	£1.28	£8.49	£15.00	£1.09	£3.11	£2.30	£18.63	n/a	£56.70
Stevenage	£23.54	£19.53	£18.62	£6.06	£5.43	£21.82	£229.76	£3.45	£5.39	n/a	£110.64
Other outflow	£11.79	£11.45	£21.75	£9.79	£45.01	£36.74	£6.22	£33.36	£26.07	n/a	£223.00
Other Sub-Total	£43.21	£58.88	£75.52	£87.31	£93.58	£80.75	£28.41	£85.13	£242.75	n/a	£1,067.63
TOTAL TURNOVER	£196.42	£163.56	£128.01	£121.28	£135.40	£109.12	£310.85	£115.04	£269.73	£58.82	£1,609.21

Sources: Table 2C
NEMS Household and Street Surveys 2007

Table 6C: 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	£245.50	£204.44	£160.95	£149.07	£170.14	£138.54	£389.08	£141.46	£331.60	n/a	£1,621.63
Market Share											
Welwyn Garden City town centre	57%	22%	30%	13%	15%	19%	3%	21%	6%	10%	n/a
Hatfield town centre	9%	27%	2%	7%	6%	2%	0%	1%	1%	0%	n/a
Neighbourhood/Village Centres	1%	4%	3%	1%	2%	4%	0%	2%	2%	0%	n/a
Hatfield Galleria	3%	5%	3%	3%	2%	0%	1%	2%	1%	40%	n/a
Out-of-centre stores	8%	0%	3%	4%	5%	1%	0%	0%	0%	10%	n/a
Welwyn Hatfield Sub-Total	78%	64%	41%	28%	30%	26%	4%	26%	10%	n/a	n/a
St Albans	2%	0%	3%	43%	4%	1%	1%	17%	61%	n/a	n/a
Potters Bar	0%	1%	0%	0%	15%	0%	0%	0%	0%	n/a	n/a
Watford	1%	2%	0%	5%	3%	0%	1%	4%	9%	n/a	n/a
Luton	0%	1%	4%	4%	0%	0%	1%	15%	1%	n/a	n/a
London Colney	0%	4%	1%	7%	11%	1%	1%	2%	7%	n/a	n/a
Stevenage	13%	12%	34%	5%	4%	20%	30%	3%	2%	n/a	n/a
Other outflow	6%	7%	17%	8%	13%	5%	2%	25%	15%	7%	n/a
Other Sub-Total	22%	36%	59%	72%	70%	74%	96%	74%	90%	n/a	n/a
TOTAL MARKET SHARE	100%	100%	100%	100%	100%	100%	100%	100%	100%	n/a	n/a
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Turnover £M											
Welwyn Garden City town centre	£139.84	£44.35	£48.35	£19.34	£25.52	£26.32	£11.20	£29.69	£19.90	£40.80	£406.69
Hatfield town centre	£22.10	£36.20	£3.22	£10.43	£10.21	£2.77	£0.00	£1.41	£3.32	£0.00	£106.66
Neighbourhood/Village Centres	£2.48	£8.18	£4.83	£1.49	£3.40	£5.54	£0.00	£2.60	£6.63	£0.00	£35.35
Hatfield Galleria	£7.37	£10.22	£4.83	£4.47	£3.40	£0.00	£3.69	£2.83	£3.32	£26.62	£67.63
Out-of-centre stores	£19.54	£12.27	£4.83	£5.55	£8.51	£1.39	£0.00	£0.00	£0.00	£5.84	£58.43
Welwyn Hatfield Sub-Total	£197.29	£130.84	£58.35	£41.74	£51.04	£36.02	£15.20	£26.76	£33.16	£73.26	£676.48
St Albans	£4.91	£16.40	£4.83	£54.10	£5.81	£1.39	£1.39	£24.04	£203.27	n/a	£330.64
Potters Bar	£0.00	£2.04	£0.00	£0.00	£25.52	£0.00	£0.00	£0.00	£0.00	n/a	£27.56
Watford	£2.46	£4.09	£0.00	£7.45	£8.10	£0.00	£3.86	£5.69	£29.04	n/a	£56.40
Luton	£0.00	£2.04	£6.43	£5.95	£0.00	£0.00	£3.86	£26.87	£3.32	n/a	£48.42
London Colney	£0.00	£9.18	£1.61	£10.43	£16.71	£1.39	£3.86	£23.21	£2.83	n/a	£70.15
Stevenage	£31.92	£24.53	£54.89	£7.45	£6.51	£27.71	£342.07	£4.24	£8.63	n/a	£508.05
Other outflow	£14.75	£14.31	£37.35	£11.93	£29.14	£29.04	£7.62	£41.61	£33.16	n/a	£278.27
Other Sub-Total	£48.01	£73.60	£94.91	£107.33	£119.10	£162.52	£384.88	£104.64	£288.44	n/a	£1,319.41
TOTAL TURNOVER	£245.50	£204.44	£160.86	£149.07	£170.14	£138.54	£389.08	£141.40	£331.60	£73.26	£1,654.89

Sources: Table 2C
NEMS Household and Street Surveys 2007

Table 7C: Summary of Comparison Expenditure/Floorspace Projections 2007 to 2021

Centre	2007	2011	2016	2021
Available Expenditure				
Welwyn Garden City town centre	£241.32	£282.16	£325.52	£405.99
Hatfield town centre	£45.52	£72.85	£87.10	£108.66
Neighbourhood/Village Centres	£19.50	£23.23	£28.35	£35.35
Hatfield Galleria	£41.29	£44.47	£53.97	£67.05
Out-of-centre stores	£36.29	£38.39	£46.81	£58.43
Total	£383.92	£461.11	£541.76	£675.48
Benchmark Turnover of Existing Floorspace				
Welwyn Garden City town centre	£209.88	£222.76	£239.97	£258.52
Hatfield town centre	£31.90	£33.86	£36.47	£39.29
Neighbourhood/Village Centres	£19.46	£20.68	£22.27	£23.99
Hatfield Galleria	£49.00	£52.01	£56.03	£60.36
Out-of-centre stores	£47.64	£50.56	£54.47	£58.68
Total	£357.90	£379.86	£409.22	£440.85
Commitments				
Welwyn Garden City town centre	n/a	£12.24	£13.19	£14.21
Hatfield town centre	n/a	£42.43	£45.71	£49.24
Neighbourhood/Village Centres	n/a	£1.89	£2.04	£2.19
Hatfield Galleria	n/a	£0.00	£0.00	£0.00
Out-of-centre stores	n/a	£0.00	£0.00	£0.00
Total	n/a	£56.56	£60.93	£65.64
Surplus Expenditure				
Welwyn Garden City town centre	£31.44	£47.16	£72.36	£133.26
Hatfield town centre	£13.62	-£3.43	£4.92	£20.12
Neighbourhood/Village Centres	£0.02	£0.67	£4.04	£9.17
Hatfield Galleria	-£7.71	-£7.54	-£2.05	£6.70
Out-of-centre stores	-£11.35	-£12.17	-£7.66	-£0.25
Total	£26.02	£24.69	£71.61	£169.00
Sales Density for New Floorspace				
Welwyn Garden City town centre	£5,000	£5,307	£5,717	£6,159
Hatfield town centre	£5,000	£5,307	£5,717	£6,159
Neighbourhood/Village Centres	£4,000	£4,245	£4,574	£4,927
Hatfield Galleria	£3,500	£3,715	£4,002	£4,311
Out-of-centre stores	£3,000	£3,184	£3,430	£3,695
Sales Floorspace (Sq M Net)				
Welwyn Garden City town centre	6,289	8,887	12,656	21,637
Hatfield town centre	2,724	-647	860	3,267
Neighbourhood/Village Centres	6	157	383	1,860
Hatfield Galleria	-2,203	-2,029	-513	1,554
Out-of-centre stores	-3,784	-3,823	-2,233	-68
Total	3,031	2,546	11,655	28,251
Gross Floorspace (Sq M Gross)				
Welwyn Garden City town centre	8,385	11,849	16,877	28,850
Hatfield town centre	3,831	-663	1,147	4,356
Neighbourhood/Village Centres	8	210	1,177	2,480
Hatfield Galleria	-2,938	-2,705	-684	2,072
Out-of-centre stores	-4,452	-4,497	-2,627	-80
Total	4,835	3,994	15,890	37,678

Sources:

Tables 3A, 3C to 6C

Appendix F

Shoppers survey: Hertsmere study

Table H10 - How often do you visit the following centres outside of the Borough?

Borehamwood	Rarely	1 - 2 times a month	Once a week	2 - 3 times a week	Everyday
London Colney	13	12	6	1	0
Watford	31	21	8	0	0
Brent Cross	31	6	5	0	0
Hatfield	19	7	0	0	0
St. Albans	31	14	3	0	0
Welwyn Garden City	11	4	2	1	0
Milton Keynes	9	0	0	0	0
Central London	33	8	3	4	0
Other (1)	5	1	2	0	0
Other (2)	4	0	0	0	0

Bushey Heath	Rarely	1 - 2 times a month	Once a week	2 - 3 times a week	Everyday
London Colney	8	3	0	0	0
Watford	0	5	9	5	1
Brent Cross	6	7	1	1	0
Hatfield	5	0	0	0	0
St. Albans	9	1	0	0	0
Welwyn Garden City	3	0	0	0	0
Milton Keynes	4	0	0	0	0
Central London	7	3	0	0	3
Other (1)	1	1	2	1	0
Other (2)	0	1	0	0	0

Bushey High Street	Rarely	1 - 2 times a month	Once a week	2 - 3 times a week	Everyday
London Colney	4	1	0	0	0
Watford	1	4	2	2	2
Brent Cross	3	1	0	0	0
Hatfield	0	0	0	0	0
St. Albans	3	2	1	0	0
Welwyn Garden City	1	0	0	0	0
Milton Keynes	0	0	0	0	1
Central London	6	2	0	0	0
Other (1)	0	1	0	1	0
Other (2)	0	0	0	0	0

Radlett	Rarely	1 - 2 times a month	Once a week	2 - 3 times a week	Everyday
London Colney	6	7	9	7	1
Watford	8	13	7	1	0
Brent Cross	13	8	2	0	0
Hatfield	10	0	0	0	0
St. Albans	14	12	2	2	0
Welwyn Garden City	4	1	0	0	0
Milton Keynes	2	0	0	0	0
Central London	18	5	3	0	0
Other (1)	1	1	1	1	0
Other (2)	0	1	1	0	0

Potters Bar Darkes Lane	Rarely	1 - 2 times a month	Once a week	2 - 3 times a week	Everyday
London Colney	12	17	4	1	1
Watford	9	8	2	1	0
Brent Cross	13	4	0	0	0
Hatfield	18	8	1	0	0
St. Albans	19	14	2	1	0
Welwyn Garden City	15	18	2	0	0
Milton Keynes	3	0	0	0	0
Central London	16	5	2	4	0
Other (1)	3	4	3	1	1
Other (2)	0	3	0	1	0

Potters Bar High Street	Rarely	1 - 2 times a month	Once a week	2 - 3 times a week	Everyday
London Colney	4	7	2	0	0
Watford	2	1	0	0	0
Brent Cross	1	0	0	0	0
Hatfield	2	5	0	0	0
St. Albans	4	7	0	0	0
Welwyn Garden City	5	2	0	0	0
Milton Keynes	0	0	0	0	0
Central London	0	3	2	0	0
Other (1)	2	3	1	0	0
Other (2)	0	3	0	0	0

Table H11 - What do you use the following centres for?

Location		Boreham-wood	Bushey Heath	Bushey High Street	Radlett	Potters Bar Darkes Lane	Potters Bar High Street
London Colney	Food	21	7	3	24	27	8
	Clothes/Shoes	17	9	3	18	25	10
	Household/Electrical	4	2	1	9	4	1
	Leisure	1	0	0	8	5	3
Watford	Food	10	15	9	7	2	2
	Clothes/Shoes	46	18	10	25	18	2
	Household/Electrical	22	13	8	20	8	0
	Leisure	13	8	4	14	4	1
Brent Cross	Food	2	3	0	2	0	0
	Clothes/Shoes	27	15	2	21	13	2
	Household/Electrical	12	6	0	12	6	2
	Leisure	6	4	0	3	1	1
Hatfield	Food	3	2	0	0	4	3
	Clothes/Shoes	14	2	0	6	9	3
	Household/Electrical	5	0	0	1	7	1
	Leisure	7	0	0	3	4	2
St. Albans	Food	12	1	2	11	8	4
	Clothes/Shoes	30	4	3	21	21	6
	Household/Electrical	8	2	2	7	11	1
	Leisure	12	3	2	10	8	3
Welwyn Garden City	Food	5	1	0	0	8	3
	Clothes/Shoes	7	0	1	4	23	4
	Household/Electrical	5	0	0	2	21	3
	Leisure	2	0	0	1	4	1
Milton Keynes	Food	1	0	0	0	0	0
	Clothes/Shoes	2	1	5	1	2	0
	Household/Electrical	1	1	0	0	3	0
	Leisure	2	0	0	0	0	0
Central London	Food	7	2	2	2	3	0
	Clothes/Shoe	27	6	1	14	15	3
	Household/Electrical	5	3	0	4	5	2
	Leisure	24	8	0	11	1	4

Appendix G

Retailer and business survey: Hertsmere study

Retailer and business survey for Borehamwood Shenley Road

Table 1: Breakdown of business type

	Percentage
Retailer	48% (21)
Restaurant/café/takeaway/pub	16% (7)
Professional/financial services	20% (9)
Personal and other services	11 % (5)
Other	5% (2)

Table 2: Business structure

	Percentage
National multiple chain	23% (10)
Part of regional multiple chain	4.5% (2)
Independent/individual	68.% (30)
Other	4.5% (2)

Table 3: Main users/Source of business

	Percentage
Local residents	84.% (37)
People working in the town centre	4.5% (2)
Local residents and those working in the town centre	11.5% (5)

Table 4: Business tenure

	Percentage
Owner/freeholder	16% (7)
Leaseholder	75% (33)
License/short-term rental	4.5% (2)
Other /not stated	4.5% (2)

Table 5: Size of premises

	Percentage
Up to 46 sq m	20% (9)
47 - 93 sq m	23% (10)
94 - 140 sq m	16% (7)
Over 140 sq m	18% (8)
No response	23% (10)

Table 6: Estimated sales 2005/2006 and 2006/2007

Estimated Sales 2005/6	Percentage	Estimated Sales 2006/7	Percentage
Less than £20,000	5% (2)	Less than £20,000	2% (1)
£20,001 - £40,000	2% (1)	£20,001 - £40,000	2% (1)
£40,001 - £60,000	7% (3)	£40,001 - £60,000	5% (2)
£60,001 - £80,000	2% (1)	£60,001 - £80,000	2% (1)
£80,001 - £100,000	7% (3)	£80,001 - £100,000	5 % (2)
£100,001 - £125,000	7% (3)	£100,001 - £125,000	7% (3)
£125,001 - £150,000	11% (5)	£125,000 - £150,000	5% (2)
£150,001 - £200,000	2% (1)	£150,001 - £200,000	0% (0)
Over £200,000	32% (14)	Over £200,000	34 % (15)
Not stated	25% (11)	Not stated	36 % (16)

Table 7: Number of years in current premises

	Percentage
Less than 1 year	11.4% (5)
1 - 5 years	18.1% (8)
6 - 10 years	27.3% (12)
11 years or more	41% (18)
Not stated	2.2% (1)

Table 8: Monthly rent for current premises

	Percentage		Percentage (No)
Less than £600	7% (3)	£4,001 - £5,000	5% (2)
£601 - £800	5% (2)	£5,001 - £6,000	0% (0)
£801 - £1,000	2% (1)	£6,001 - £7,000	2% (1)
£1,001 - £2,000	36% (16)	£7,001 - £8,000	2% (1)
£2,001 - £3,000	9% (4)	£8,001 - £9,000	0% (0)
£3,001 - £4,000	0% (0)	More than £9,000	5% (2)
Not stated	27% (12)		

Table 9: Satisfaction with current premises

	Percentage		Percentage (No)
Very satisfied	23% (10)	Unsatisfied	18% (8)
Fairly satisfied	15% (7)	Very unsatisfied	7% (3)
Satisfied	34% (15)	Not stated	2% (1)

Table 10: Reason for dissatisfaction with current premises

	No		No
Too large	0	Other (1) - Rent/rates too high	1
Too small	2	Other (2) - Too many fast food shops	1
In poor condition	6	Other (3) - Not enough flow of customers	1
Lack of suitable servicing	3	Not stated	11
Lack of parking	10		

Table 11: Plans for refurbishment

	Percentage
Yes - Internal refurbishment	18% (8)
Yes - External refurbishment	0% (0)
Yes - Internal and external	9% (4)
No	71% (31)
Not stated	2% (1)

Table12: Plans to relocate and reasons

	Percentage
Rents or business rates too high	20.45% (9)
Need to access more customers	4.54% (2)
Rents/business rates too high + need to access more customers	4.54% (2)
Other 1: Premises in poor state	4.54% (2)

Table 13: Where intended to locate

	Percentage
Within any of the other town centres listed in Q1	9% (4)
Anywhere else (Please specify)	11.36% (5)
Not known	4.54% (2)
Not stated	9% (4)

Table 14: Intention to close business and reasons

	Percentage
Rent or business rates too high	11% (5)
Profit margins too low	5% (2)
Other: Competition from GIANTS/Tesco	5% (2)

Table 15: Turnover in the past three years

	Percentage
Increasing	16% (7)
Decreasing	39% (17)
No change	34% (15)
Not stated	11 % (5)

Table 16: Main factors that affected business turnover in the past year

	Percentage
Rent increases	16% (7)
Increased competition	25% (11)
None	18% (8)
Other 1: Parking	6.8% (3)
Other 2: Competition from Tesco	6.8% (3)
Other 3	9% (4)
Markets	2% (1)
Low footfall	2% (1)
Education policies	2% (1)
Not stated	11.36 % (5)

Table 17: Business performance in the next five years

	Percentage
Stay the same	29% (13)
Expanding	23% (10)
Opening other branches	14% (6)
Looking to sell	14% (6)
Close	7% (3)
Other: Move to another area)	2% (1)
Decreasing in profit	2% (1)
Not stated	9% (4)

Table 18: Main challenges faced by retailers/businesses within town centre

	No
Crime and vandalism	12
Poor quality environment	18
Low pedestrian flow outside premises	18
Competition from all town centres in Hertsmere	2
Competition specifically from Radlett	2
Competition from town centres outside Hertsmere	
Barnet	1
Watford	3
St. Albans	1
Edgware	1
Brent	1
Competition from similar providers/traders	2
Insufficient passing trade	20
Lack of parking	3
Competition from Tesco	3
Too many charity shops	1
Continuous road works	1

Table 19: Rating of Borehamwood facilities

	Good	Average	Poor
	No	No	No
Quality of shops	7	27	11
Range of shops	6	24	15
Accessibility by car	10	19	13
Car parking provision	7	11	24
Accessibility by public transport	19	22	1
Ease with which pedestrians can move around	18	21	2
Restaurants/ cafes/takeaways	23	20	5
Crime/perception of crime	8	31	10
Security measures (e.g. CCTV)	10	16	10
Cleanliness/tidiness	4	17	21
Traffic and congestion	4	22	17
Range of leisure/recreation facilities	5	24	13
Quality of leisure/recreational facilities	6	24	14
Things to do in the evening	0	16	22
Quality of street furnishing/landscaping	5	21	17

Table 20: Borehamwood town centre economic performance

	Percentage (No)
Excellent	2% (1)
Fairly good	2% (1)
Average	52% (23)
Poor	20% (9)
Very poor	9 % (4)
Not stated	1.6% (6)

Table 21: Satisfaction with evening activities/facilities in Borehamwood

Evening Activity	Very satisfied	Satisfied	Fairly satisfied	Unsatisfied	Very unsatisfied
Restaurant	1	12	15	3	
Takeaway	1	16	9	4	
Pubs/bars		15	9	3	3

Retailer and business survey for Potters Bar Darkes Lane

Table 22: Breakdown of business type

	Percentage
Retailer	51% (18)
Restaurant/café/takeaway/pub	11% (4)
Professional/financial services	29% (10)
Personal and other services	9% (3)

Table 23: Business structure

	Percentage
National multiple chain	20% (7)
Part of regional multiple chain	3% (1)
Independent/individual	77% (27)

Table 24: Main users/Source of business

	Percentage
Local residents	77% (27)
People working in the town centre	0
Local residents and those working in the town centre	9% (3)
Hertsmere boundaries and beyond	11% (4)

Table 25: Business tenure

	Percentage
Owner/freeholder	11% (4)
Leaseholder	80% (28)
License/short-term rental	6% (2)
Other	3% (1)

Table 26: Size of premises

	Percentage
Up to 46 sq m	17% (6)
47 - 93 sq m	31.5% (11)
94 - 140 sq m	31.5% (11)
Over 140 sq m	6% (2)
No response	14% (5)

Table 27: Estimated sales 2005/2006 and 2006/2007

Estimated Sales 2005/6	Percentage	Estimated Sales 2006/7	Percentage
Less than £20,000	2	Less than £20,000	1
£20,001 - £40,000	0	£20,001 - £40,000	1
£40,001 - £60,000	1	£40,001 - £60,000	0
£60,001 - £80,000	1	£60,001 - £80,000	3
£80,001 - £100,000	2	£80,001 - £100,000	2
£100,001 - £125,000	2	£100,001 - £125,000	1
£125,001 - £150,000	2	£125,000 - £150,000	2
£150,001 - £200,000	6	£150,001 - £200,000	5
Over £200,000	9	Over £200,000	11
Not stated/not applicable	10	Not stated/not applicable	7

Table 28: Number of years in current premises

	Percentage
Less than 1 year	4
1 - 5 years	9
6 - 10 years	4
11 years or more	16
Not stated	2

Table 29: Monthly rent for current premises

	Percentage		Percentage (No)
Less than £600	1	£4,001 - £5,000	1
£601 - £800	6	£5,001 - £6,000	0
£801 - £1,000	3	£6,001 - £7,000	0
£1,001 - £2,000	9	£7,001 - £8,000	0
£2,001 - £3,000	5	£8,001 - £9,000	0
£3,001 - £4,000	1	More than £9,000	2
Not stated/owner occupier	7		

Table 30: Satisfaction with current premises

	Percentage	Number
Very satisfied	11%	4
Satisfied	20%	7
Fairly satisfied	48%	16
Unsatisfied	11%	4
Very unsatisfied	11%	4

Table 31: Reason for dissatisfaction with current premises

	Percentage		Percentage (No)
Too large	0%	Lack of suitable servicing	13%
Too small	5%	Lack of parking	64%
In poor condition	5%	Other 1: Competition	13%

Table 32: Plans for refurbishment

	Percentage	Number
Yes - Internal refurbishment	20%	7
Yes - External refurbishment	11%	4
No	69%	24

Table 33: Plans to relocate and reasons

	Percentage
Rents or business rates too high	53%
Need to access more customers	20%
Larger premises	13%
Too small	7%
No parking	7%

Table 34: Where intended to locate

	Percentage
Within any of the other town centres listed in Q1 - Stay in Darkes Lane Potters Bar High St	20% 10%
Anywhere else - Welwyn Garden City	20%
Luton	10%
Hatfield	10%
London/closer to London	20%
Ware	10%

Table 35: Intention to close business and reasons

	Percentage
Rent or business rates too high	79% (11)
Profit margins too low	14% (2)
Other 1: Too much competition from supermarkets	7% (1)

Table 36: Turnover in the past three years

	Percentage
Increasing	35%
Decreasing	35%
No change	26%
Not stated	4%

Table 37: Main factors that affected business turnover in the past year

	Percentage
Rent increases	26% (9)
Increase in competition	31% (11)
None	17% (6)
Other 1: Parking/lack of free staff parking	14% (5)
Other 2: Decrease in shoppers	6% (2)
Other 3: Poor quality shops	3% (1)
Other 4: Increased competition	3% (1)

Table 38: Business performance in the next five years

	Percentage
Stay the same	29% (10)
Expanding	29% (10)
Opening other branches	6% (2)
Looking to sell	21% (7)
Close	12% (4)
Other 1: Parking	3% (1)

Table 39: Main challenges faced by retailers/businesses within town centre

	Percentage
Crime and vandalism	12
Poor quality environment	8
Low pedestrian flow outside premises	23
Competition from town centres outside Hertsmere	3
Insufficient passing trade	14

Table 40: Rating of Potters Bar (Darkes Lane) facilities

	Good	Average	Poor
Quality of shops	4	16	16
Range of shops	-	10	25
Accessibility by car	4	19	10
Car parking provision	2	13	18
Accessibility by public transport	13	18	3
Ease with which pedestrians can move around	17	17	1
Restaurants/ cafes/takeaways	12	14	8
Crime/perception of crime	3	14	16
Security measures (e.g. CCTV)	6	12	17
Cleanliness/tidiness	4	21	9
Traffic and congestion	3	20	7
Range of leisure/recreation facilities	4	24	12
Quality of leisure/recreational facilities	3	18	8
Things to do in the evening	0	13	20
Quality of street furnishing/landscaping	12	16	6

Table 41: Rating Potters Bar Darkes Lane performance

	Percentage
Excellent	0
Fairly good	6% (2)
Average	37% (13)
Poor	46% (16)
Very poor	11% (4)

Table 42: Satisfaction with evening activities/facilities in Darkes Lane

Evening Activity	Very satisfied	Satisfied	Fairly satisfied	Unsatisfied	Very unsatisfied
Restaurant		13	12	3	4
Takeaway		14	10	2	4
Pubs/bars		14	12	2	6

Retailer and Business Survey for Potters Bar High Street

Table 43: Breakdown of business type

	Percentage
Retailer	50% (12)
Restaurant/café/takeaway/pub	21% (5)
Professional/financial services	12.5% (3)
Personal and other services	12.5% (3)
Other	4% (1)

Table 44: Business structure

	Percentage
National multiple chain	13% (3)
Part of regional multiple chain	4% (1)
Independent/individual	83% (20)

Table 45: Main users/Source of business

	Percentage
Local residents	58% (14)
People working in the town centre	4% (1)
Local residents and those working in the town centre	4% (1)
Other 1: Beyond Hertsmere	25% (6)
Other 2: National	8% (2)

Table 46: Business tenure

	Percentage
Owner/freeholder	33% (8)
Leaseholder	54% (13)
License/short-term rent	13% (3)

Table 47: Size of premises

	Percentage
Up to 46 sq m	17% (4)
47 - 93 sq m	25% (6)
94 - 140 sq m	28% (7)
Over 140 sq m	21% (5)
No response	8% (2)

Table 48: Estimated sales 2005/2006 and 2006/2007

Estimated Sales 2005/6	Percentage	Estimated Sales 2006/7	Percentage
Less than £20,000	-	Less than £20,000	-
£20,001 - £40,000	4% (1)	£20,001 - £40,000	4% (1)
£40,001 - £60,000	8% (2)	£40,001 - £60,000	-
£60,001 - £80,000	-	£60,001 - £80,000	-
£80,001 - £100,000	4% (1)	£80,001 - £100,000	4% (1)
£100,001 - £125,000	-	£100,001 - £125,000	4% (1)
£125,001 - £150,000	-	£125,000 - £150,000	-
£150,001 - £200,000	4% (1)	£150,001 - £200,000	4% (1)
Over £200,000	38% (9)	Over £200,000	42% (10)
Not stated/not applicable	42% (10)	Not stated/not applicable	42% (10)

Table 49: Number of years in current premises

	Percentage
Less than 1 year	-
1 - 5 years	25% (6)
6 - 10 years	8% (2)
11 years or more	67% (16)

Table 50: Monthly rent for current premises

	Percentage		Percentage
Less than £600	8% (2)	£4,001 - £5,000	-
£601 - £800	13% (3)	£5,001 - £6,000	-
£801 - £1,000	4% (1)	£6,001 - £7,000	-
£1,001 - £2,000	13% (3)	£7,001 - £8,000	-
£2,001 - £3,000	4% (1)	£8,001 - £9,000	-
£3,001 - £4,000	4% (1)	More than £9,000	29% (7)
Not stated/own premises	25% (6)		

Table 51: Satisfaction with current premises

	Percentage
Very satisfied	21% (5)
Satisfied	29% (7)
Fairly satisfied	33% (8)
Unsatisfied	4% (1)
Very unsatisfied	8% (2)
Not stated	4% (1)

Table 52: Reason for dissatisfaction with current premises

	Percentage		Percentage
Too large	-	Lack of suitable servicing	8% (2)
Too small	-	Lack of parking	21% (5)
In poor condition	13% (3)	Other (1) Rates too high	4% (1)

Table 53: Plans for refurbishment

	Percentage
Yes - Internal refurbishment	21% (5)
Yes - External refurbishment	13% (3)
No	63% (15)
Internal and external	4% (1)

Table 54: Plans to relocate and reasons

	Percentage
Rents or business rates too high	25% (6)
Need to access more customers	13% (3)
Other 1: Save costs	4% (1)

Table 55: Where intended to locate

	Percentage
Within any of the other town centres listed in Q1 Radlett	4% (1)
Not specified	4% (1)
Anywhere else? Hatfield	4% (1)
Not specified	4% (1)

Table 56: Intention to close business and reasons

	Percentage
Rent or business rates too high	21% (5)
Profit margins too low	(0)

Table 57: Turnover in the past three years

	Percentage
Increasing	13% (3)
Decreasing	42% (10)
No change	46% (11)

Table 58: Main factors that affected business turnover in the past year

	Percentage
Rent /rate increases	28% (7)
Increased competition	46% (11)
None	8% (2)
Other 1: Parking	4% (1)
Other 2: Change of market	4% (1)
Not stated	8% (2)

Table 59: Business performance in the next five years

	Percentage
Stay the same	67% (16)
Expanding	21% (5)
Opening other branches	0% (0)
Looking to sell	8% (2)
Close	0% (0)
Not stated	4% (1)

Table 60: Main challenges faced by retailers/businesses within town centre

	Number
Crime and vandalism	8
Poor quality environment	3
Low pedestrian flow outside premises	10
Competition from town centres outside Hertsmere Watford	1
Not specified	1
Insufficient passing trade	10
Other 1: Competition from Tesco	2
Other 2: Online businesses/internet	1

Table 61: Rating of Potters Bar High Street facilities

	Good	Average	Poor
	%	%	%
Quality of shops	21% (5)	58% (14)	21% (5)
Range of shops	8% (2)	46% (11)	42% (10)
Accessibility by car	46% (11)	42% (10)	8% (2)
Car parking provision	21% (5)	58% (14)	21% (5)
Accessibility by public transport	33% (8)	50% (12)	13% (3)
Ease with which pedestrians can move around	71% (17)	33% (8)	0 % (0)
Restaurants/cafes/takeaways	50% (12)	38% (9)	17% (4)
Crime/perception of crime	13% (3)	54% (13)	25% (6)
Security measures (e.g. CCTV)	4% (1)	42% (10)	46% (11)
Cleanliness/tidiness	17% (4)	79% (19)	8% (2)
Traffic and congestion	17% (4)	71% (17)	13% (3)
Range of leisure/recreation facilities	17% (4)	58.3% (14)	13% (3)
Quality of leisure/recreational facilities	25% (6)	42% (10)	17% (4)
Things to do in the evening	4% (1)	42% (10)	50% (12)
Quality of street furnishing/landscaping	13% (3)	62.5% (15)	21% (5)

Table 62: Rating Potters Bar High Street economic performance

	Percentage
Excellent	-
Fairly good	13% (3)
Average	50% (12)
Poor	17% (4)
Very poor	-
No response	21% (5)

Table 63: Satisfaction with evening activities/facilities in Potters Bar High Street

Evening Activity	Very satisfied	Satisfied	Fairly satisfied	Unsatisfied	Very unsatisfied
Restaurant	25% (6)	25% (6)	33% (8)	0	8% (2)
Takeaway	17% (4)	2% (7)	33% (8)	13% (3)	4% (1)
Pubs/bars	13% (3)	25% (6)	25% (6)	17% (4)	4% (1)

Retailer and business survey for Bushey High Street

Table 64: Breakdown of business type

	Percentage
Retailer	47% (9)
Restaurant/café/takeaway/pub	11% (2)
Professional/financial services	26% (5)
Personal and other services	11% (2)
Other	5% (1)

Table 65: Business structure

	Percentage
National multiple chain	16% (3)
Part of regional multiple chain	0
Independent/individual	79% (15)
Not stated	5% (1)

Table 66: Main users/Source of business

	Percentage
Local residents	84% (16)
People working in the town centre	0
Local residents and those working in the town centre	0
Beyond Hertsmere boundaries and/or national	5% (1)
National	11% (2)

Table 67: Business tenure

	Percentage
Owner/freeholder	53% (10)
Leaseholder	37% (7)
License/short-term rental	5% (1)
Other/not stated	5% (1)

Table 68: Size of premises

	Percentage
Up to 46 sq m	21% (4)
47 - 93 sq m	31% (6)
94 - 140 sq m	21% (4)
Over 140 sq m	16% (3)
No response	11% (2)

Table 69: Estimated sales 2005/2006 and 2006/2007

Estimated Sales 2005/6	Percentage	Estimated Sales 2006/7	Percentage
Less than £20,000	-	Less than £20,000	-
£20,001 - £40,000	-	£20,001 - £40,000	-
£40,001 - £60,000	11% (2)	£40,001 - £60,000	11% (2)
£60,001 - £80,000	5% (1)	£60,001 - £80,000	11% (2)
£80,001 - £100,000	5% (1)	£80,001 - £100,000	5% (1)
£100,001 - £125,000	16% (3)	£100,001 - £125,000	0
£125,001 - £150,000	0	£125,000 - £150,000	5% (1)
£150,001 - £200,000	5% (1)	£150,001 - £200,000	5% (1)
Over £200,000	21% (4)	Over £200,000	26% (5)
Not stated/not applicable	37% (7)	Not stated/not applicable	37% (7)

Table 70: Number of years in current premises

	Percentage
Less than 1 year	0
1 - 5 years	42% (8)
6 - 10 years	26% (5)
11 years or more	32% (6)

Table 71: Monthly rent for current premises

	Percentage		Percentage
Less than £600	0	£4,001 - £5,000	0
£601 - £800	0	£5,001 - £6,000	5% (1)
£801 - £1,000	5%(1)	£6,001 - £7,000	0
£1,001 - £2,000	16% (3)	£7,001 - £8,000	0
£2,001 - £3,000	5% (1)	£8,001 - £9,000	0
£3,001 - £4,000	0	More than £9,000	5% (1)
Owner-occupier	11% (2)		
Not stated	63% (10)		

Table 72: Satisfaction with current premises

	Percentage
Very satisfied	26% (5)
Satisfied	21% (4)
Fairly satisfied	32% (6)
Unsatisfied	16% (3)
Very unsatisfied	5% (1)

Table 73: Reason for dissatisfaction with current premises

	Number		Number
Too large	0	Lack of suitable servicing	0
Too small	1	Lack of parking	4
In poor condition	1		

Table 74: Plans for refurbishment

	Percentage
Yes - Internal refurbishment	16% (3)
Yes - External refurbishment	11% (2)
No	68% (13)
Not stated	5% (1)

Table 75: Plans to relocate and reasons

	Number
Rents or business rates too high	2
Need to access more customers	1
Other 1: Need for bigger premises	1

Table 76: Where intended to locate

	Number
Within any of the town centres listed in Q1 (please state where)	3
Anywhere else (Please specify)	0

Table 77: Intention to close business and reasons

	Number
Rent or business rates too high	2
Profit margins too low	0

Table 78: Turnover in the past three years

	Percentage
Increasing	53% (10)
Decreasing	21% (4)
No change	21% (4)
Not stated	5% (1)

Table 79: Main factors that affected business turnover in the past year

	Percentage
Rent increases	5% (1)
Increased competition	16% (3)
None	11% (2)
Other 1: Parking	11% (2)
Drop in footfall	5% (1)
Deteriorating physical conditions	5% (1)
High business rates	11% (2)
Business closures I the town centre	5% (1)
Expansion of company (positive impact)	5% (1)
Not stated	26% (5)

Table 80: Business performance in the next five years

	Percentage
Stay the same	47% (9)
Expanding	21% (4)
Opening other branches	5% (1)
Looking to sell	16% (3)
Close	5% (1)
Other 1: Decreasing slowly	5% (1)

Table 81: Main challenges faced by retailers/businesses within town centre

	Number
Crime and vandalism	7
Poor quality environment	2
Low pedestrian flow outside premises	10
Competition from town centres outside Hertsmere: Watford	4
Insufficient passing trade	6
Other 1: Parking	2
None	1
Not stated	2

Table 82: Rating of Bushey High Street facilities

	Good	Average	Poor
Quality of shops	3	11	5
Range of shops	1	6	13
Accessibility by car	6	12	1
Car parking provision	8	8	4
Accessibility by public transport	10	10	0
Ease with which pedestrians can move around	8	12	0
Restaurants/cafes/takeaways	8	9	3
Crime/perception of crime	3	9	8
Security measures (e.g. CCTV)	1	4	14
Cleanliness/tidiness	3	11	6
Traffic and congestion	3	11	6
Range of leisure/recreation facilities	2	11	7
Quality of leisure/recreational facilities	3	9	6
Things to do in the evening	1	9	9
Quality of street furnishing/landscaping	1	7	10

Table 83: Rating Bushey High Street economic performance

	Percentage
Excellent	0
Fairly good	16% (3)
Average	42% (8)
Poor	26% (5)
Very poor	5% (1)
Not stated	11% (2)

Table 84: Satisfaction with evening activities/facilities in Bushey High Street

Evening Activity	Very satisfied	Satisfied	Fairly satisfied	Unsatisfied	Very unsatisfied
Restaurant	5	6	5	0	1
Takeaway	4	6	5	2	0
Pubs/bars	6	4	7	1	0

Retailer and business survey for Bushey Heath High Road

Table 85: Breakdown of business type

	Percentage
Retailer	70% (7)
Restaurant/café/takeaway/pub	10% (1)
Professional/financial services	20% (2)
Personal and other services	0

Table 86: Business structure

	Percentage
National multiple chain	-
Part of regional multiple chain	-
Independent/individual	90% (9)
Franchise	10% (1)

Table 87: Main users/Source of business

	Percentage
Local residents	80% (8)
People working in the town centre	-
Local residents and those working in the town centre	-
Beyond Hertsmere boundary	10% (1)
Not stated	10% (1)

Table 88: Business Tenure

	Percentage
Owner/freeholder	0
Leaseholder	100% (10)
License/short-term rental	0

Table 89: Size of Premises

	Percentage
Up to 46 sq m	10% (1)
47 - 93 sq m	30% (3)
94 - 140 sq m	0
Over 140 sq m	30% (3)
No response	30% (3)

Table 90: Estimated sales 2005/2006 and 2006/2007

Estimated Sales 2005/6	Percentage	Estimated Sales 2006/7	Percentage
Less than £20,000	-	Less than £20,000	-
£20,001 - £40,000	-	£20,001 - £40,000	-
£40,001 - £60,000	-	£40,001 - £60,000	-
£60,001 - £80,000	-	£60,001 - £80,000	-
£80,001 - £100,000	-	£80,001 - £100,000	-
£100,001 - £125,000	-	£100,001 - £125,000	-
£125,001 - £150,000	10% (1)	£125,000 - £150,000	10% (10)
£150,001 - £200,000	20% (2)	£150,001 - £200,000	10% (10)
Over £200,000	30% (3)	Over £200,000	50% (5)
Not stated/not applicable	40% (4)	Not stated/not applicable	30% (3)

Table 91: Number of years in current premises

	Percentage
Less than 1 year	-
1 - 5 years	30% (3)
6 - 10 years	40% (4)
11 years or more	30% (3)

Table 92: Monthly rent for current premises

	Percentage		Percentage
Less than £600	-	£4,001 - £5,000	-
£601 - £800	10% (1)	£5,001 - £6,000	10% (1)
£801 - £1,000	20% (2)	£6,001 - £7,000	-
£1,001 - £2,000	30% (3)	£7,001 - £8,000	-
£2,001 - £3,000	-	£8,001 - £9,000	-
£3,001 - £4,000	-	More than £9,000	20% (2)
Not stated	10% (1)		

Table 93: Satisfaction with current premises

	Percentage
Very satisfied	0
Satisfied	20% (2)
Fairly satisfied	40% (4)
Unsatisfied	30% (3)
Very unsatisfied	10% (1)

Table 94: Reason for dissatisfaction with current premises

	Percentage		Percentage
Too large	-	Lack of suitable servicing	10% (1)
Too small	10% (1)	Lack of parking	20% (2)
In poor condition	20% (2)	Other 1: Unhelpful landlord	10% (1)
		Other 2: Too small and lack parking	10% (1)

Table 95: Plans for refurbishment

	Percentage
Yes - Internal refurbishment	10% (1)
Yes - External refurbishment	10% (1)
No	80% (8)

Table 96: Plans to relocate and reasons

	Number
Rents or business rates too high	10% (1)
Need to access more customers	-

Table 97: Where intended to locate

	Number
No response	

Table 98: Intention to close business and reasons

	Percentage
Rent or business rates too high	10% (1)
Profit margins too low	-
Other (please state)	-

Table 99: Turnover in the past three years

	Percentage
Increasing	50% (5)
Decreasing	20% (2)
No change	30% (3)

Table 100: Main factors that affected business turnover in the past year

	Percentage
Rent increases	10% (1)
Increased competition	20% (1)
None	-
Other 1: Road works	10% (1)

Table 101: Business performance in the next five years

	Percentage
Stay the same	30% (3)
Expanding	40% (4)
Opening other branches	0
Looking to sell	10% (1)
Close	0

Table 102: Main challenges faced by retailers/businesses within town centre

	Percentage
Crime and vandalism	50% (5)
Poor quality environment	-
Low pedestrian flow outside premises	40% (4)
Competition from town centres outside Hertsmere: Harrow	10% (1)
Insufficient passing trade	20% (2)
Other 1: Parking restrictions/lack of parking	40% (4)
Other 2: Closure of bank branches	10% (1)

Table 103: Rating of Bushey Heath facilities

	Good	Average	Poor
Quality of shops	0	8	0
Range of shops	1	2	5
Accessibility by car	2	4	1
Car parking provision	2	1	6
Accessibility by public transport	1	5	3
Ease with which pedestrians can move around	3	5	0
Restaurants/cafes/takeaways	3	6	0
Crime/perception of crime	2	3	4
Security measures (e.g. CCTV)	0	0	8
Cleanliness/tidiness	0	5	3
Traffic and congestion	2	7	1
Range of leisure/recreation facilities	0	2	6
Quality of leisure/recreational facilities	0	0	0
Things to do in the evening	0	1	7
Quality of street furnishing/landscaping	1	4	4

Table 104: Rating Bushey Heath economic performance

	Percentage
Excellent	0
Fairly good	40% (4)
Average	50% (5)
Poor	10% (1)
Very poor	-

Table 105: Satisfaction with evening activities/facilities in Bushey Heath

Evening Activity	Very satisfied	Satisfied	Fairly satisfied	Unsatisfied	Very unsatisfied
Restaurant		4	5		
Takeaway		3	5		
Pubs/bars	1	3	2	2	1

Retailer and business survey for Radlett Watling Street

Table 106: Breakdown of business type

	Percentage
Retailer	59% (13)
Restaurant/café/takeaway/pub	0% (0)
Professional/financial services	36 % (8)
Personal and other services	0% (0)
Other	5% (1)

Table 107: Business structure

	Percentage
National multiple chain	9% (2)
Part of regional multiple chain	5% (1)
Independent/individual	86% (19)

Table 108: Main users/Source of business

	Percentage
Local residents	77% (17)
People working in the town centre	0% (0)
Local residents and those working in the town centre	9% (2)
Beyond Hertsmere boundary	4% (1)
National	9% (2)

Table 109: Business tenure

	Percentage
Owner/freeholder	18% (4)
Leaseholder	73% (16)
License/short-term rental	0% (0)
Other /not stated	9% (2)

Table 110: Size of premises

	Percentage
Up to 46 sq m	41% (9)
47 - 93 sq m	18% (4)
94 - 140 sq m	9% (2)
Over 140 sq m	14% (3)
Not stated	18% (4)

Table 111: Estimated sales 2005/2006 and 2006/2007

Estimated Sales 2005/6	Percentage	Estimated Sales 2006/7	Percentage
Less than £20,000	0% (0)	Less than £20,000	0% (0)
£20,001 - £40,000	14% (3)	£20,001 - £40,000	9% (2)
£40,001 - £60,000	5% (1)	£40,001 - £60,000	5% (1)
£60,001 - £80,000	18% (4)	£60,001 - £80,000	5% (1)
£80,001 - £100,000	0% (0)	£80,001 - £100,000	5% (1)
£100,001 - £125,000	9% (2)	£100,001 - £125,000	5% (1)
£125,001 - £150,000	5% (1)	£125,000 - £150,000	5% (1)
£150,001 - £200,000	5% (1)	£150,001 - £200,000	5% (1)
Over £200,000	14% (3)	Over £200,000	18% (4)
Not stated/not applicable	32% (7)	Not stated/not applicable	45 (10)

Table 112: Number of years in current premises

	Percentage
Less than 1 year	5% (1)
1 - 5 years	27% (6)
6 - 10 years	27% (6)
11 years or more	41% (9)

Table 113: Monthly rent for current premises

	Percentage		Percentage
Less than £600	14% (3)	£5,001 - £6,000	0
£601 - £800	5% (1)	£6,001 - £7,000	0
£801 - £1,000	14% (3)	£7,001 - £8,000	0
£1,001 - £2,000	23% (5)	£8,001 - £9,000	0
£2,001 - £3,000	23% (5)	More than £9,000	0
£3,001 - £4,000	0		
£4,001 - £5,000	5% (1)		
Owner- occupier/freeholder / not stated	18% (4)		

Table 114: Satisfaction with current premises

	Percentage
Very satisfied	27% (6)
Satisfied	27% (6)
Fairly satisfied	23% (5)
Unsatisfied	18% (4)
Very unsatisfied	5% (1)

Table 115: Reason for dissatisfaction with current premises

	Percentage		Percentage
Too large	0	Lack of suitable servicing	3
Too small	3	Lack of parking	8
In poor condition	1	Other: Rates high for a small business	1
		Other: Not stated	2

Table 116: Plans for refurbishment

	Percentage
Yes - Internal refurbishment	23% (5)
Yes - External refurbishment	0% (0)
No	77% (17)

Table 117: Plans to relocate and reasons

	Percentage
Rents or business rates too high	9% (2)
Need to access more customers	5% (1)
Other 1: Lack of parking	5% (1)
Other 2: Premises too small	5% (1)

Table 118: Where intended to relocate

	Percentage
Elsewhere in Radlett	9% (2)
Anywhere else	5% (1)
East London	5% (1)

Table 119: Intention to close business and reasons

	Percentage
Rent or business rates too high	14% (3)
Profit margins too low	5% (1)
Other (please state)	0

Table 120: Turnover in the past three years

	Percentage
Increasing	36% (8)
Decreasing	18% (4)
No change	36% (8)
Other 1: Fluctuating	5% (1)
Not stated	5% (1)

Table 121: Main factors that affected business turnover in the past year

	Percentage
Rent increases	36% (8)
Increased competition	18% (4)
None	36% (8)
Fluctuating	5% (1)
Not stated	5% (1)

Table 122: Business performance in the next five years

	Percentage
Stay the same	40%. (9)
Expanding	23% (5)
Opening other branches	9% (2)
Looking to sell	23% (5)
Close	0% (0)
Not stated	5% (1)

Table 123: Main challenges faced by retailers/businesses within town centre

	Number
Crime and vandalism	5
Poor quality environment	3
Low pedestrian flow outside premises	13
Competition from other town centres in Hertsmere: Borehamwood	2
Competition from town centres outside Hertsmere: London Colney	2
Insufficient passing trade	8
Other: Lack of parking/parking facilities	2
Other: Flooding	1
No response	3

Table 124: Rating of Radlett facilities

	Good	Average	Poor
Quality of shops	9	10	2
Range of shops	2	11	8
Accessibility by car	8	9	3
Car parking provision	6	10	5
Accessibility by public transport	5	9	5
Ease with which pedestrians can move around	11	9	1
Restaurants/cafes/takeaways	16	6	0
Crime/perception of crime	2	14	6
Security measures (e.g. CCTV)	2	8	13
Cleanliness/tidiness	4	12	5
Traffic and congestion	3	10	10
Range of leisure/recreation facilities	1	6	13
Quality of leisure/recreational facilities	1	7	11
Things to do in the evening	4	11	7
Quality of street furnishing/landscaping	4	12	6

Table 125: Radlett economic performance rating

	Percentage
Excellent	5% (1)
Fairly good	36% (8)
Average	41% (9)
Poor	9% (2)
Very poor	5% (1)
Not stated	5% (1)

Table 126: Satisfaction with evening activities/facilities in Radlett

Evening Activity	Very satisfied	Satisfied	Fairly satisfied	Unsatisfied	Very unsatisfied
Restaurant	11	7	5		
Takeaway	6	13	3		
Pubs/bars	4	12	3	2	1

Appendix H

Footfall counts in Hertsmere's retail centres

Footfall counts October 2007

Borehamwood	Shenley Road outside Tesco (6)	Shenley Road opposite Tesco (6)	White-house/ Shenley South (7)	White-house/ Shenley North (5)	The Point, Shenley Road, South (8)	The Point, Shenley Road, North (4)	Boulevard Centre, Shenley Road (1/10)	Shenley Road, Petzone South (3)	Shenley Road, Petzone North (9)
Male child	0	0	2	5	1	2	5	3	0
Male teenager	1	1	2	0	7	1	1	1	0
Male 20 - 40	9	12	15	37	9	9	28	11	21
Male 41 - 65	20	6	11	21	12	21	15	6	9
Male 66+	4	3	4	8	2	9	19	1	0
Female child	1	0	3	5	0	3	7	0	1
Female teenager	0	1	1	4	3	0	0	0	0
Female 20 - 40	18	25	21	29	17	33	52	7	15
Female 41 - 65	18	8	13	39	10	26	32	5	10
Female 66+	2	5	7	17	7	8	17	2	2
TOTAL	73	61	79	165	68	112	176	36	58

Potters Bar Darkes Lane	Manor Road West	Manor Road East	Darkes Lane West	Darkes Lane East	Sainsbury's West	Sainsbury's East	The Broadway West	The Broadway East	TOTALS OF AGES
Male child	1	1	3		3	3	2	3	16
Male teenager	0	0	3	0	1	0	5	2	11
Male 20 - 40	8	4	4	9	7	0	11	4	47
Male 41 - 65	3	3	8	4	11	4	4	1	38
Male 66+	3	2	7	8	2	2	1	3	28
Female child	0	2	3	1	3	4	2	1	16
Female teenager	0	0	3	1	6	3	2	3	18
Female 20 - 40	5	1	14	15	14	7	11	7	74
Female 41 - 65	3	5	10	10	6	5	6	3	48
Female 66+	2	2	1	6	5	0	4	3	23
TOTAL	25	20	56	54	58	28	48	30	319

Potters Bar High Street	War Memorial West	War Memorial East	BP Garage West	BP Garage East	High Street Junction West Side	High Street Junction East Side	Barnet Road West	Barnet Road East	Opposite Bus Garage	TOTALS OF AGES
Male child	0	0	2	0	0	1	0	0	1	4
Male teenager	1	1	0	1	0	0	0	0	2	5
Male 20 - 40	2	2	11	1	13	3	7	7	2	48
Male 41 - 65	7	2	6	5	9	6	2	4	0	41
Male 66+	4	1	1	2	1	1	0	0	3	13
Female child	0	0	1	0	1	1	0	0	1	4
Female teen	0	0	0	1	2	0	1	0	2	6
Female 20 - 40	5	3	8	0	15	3	2	2	2	40
Female 41 - 65	5	1	5	3	11	4	3	2	2	36
Female 66+	3	2	2	0	2	1	1	1	2	14
TOTAL	27	12	36	13	54	20	16	16	17	211

Radlett Watling Street	Opposite Synagogue Watling Street	Station West	Station East	War Memorial West	War Memorial East	Post Office West	Post Office East	TOTALS OF AGES
Male child	1	1	3	1	5	3	1	15
Male teenager	0	0	3	0	2	2	3	10
Male 20 - 40	7	7	5	5	5	11	3	43
Male 41 - 65	6	1	5	6	5	8	2	33
Male 66+	3	1	1	6	6	3	5	25
Female child	2	1	1	0	3	3	4	14
Female teenager	2	0	1	6	5	1	3	18
Female 20 - 40	6	6	12	12	11	13	14	74
Female 41 - 65	3	2	3	10	5	6	15	44
Female 66+	1	2	4	5	3	4	6	25
TOTAL	31	21	38	51	50	54	56	301

Bushey High Street	Kemp Place/ High St. North	Kemp Place/ High St. South	Park Road/ High St. North	Park Road/ High St. South	Bournehall Road North	TOTALS OF AGES
Male child	0	0	0	0	2	2
Male teenager	1	0	2	0	1	4
Male 20 - 40	4	0	7	2	4	17
Male 41 - 65	6	0	6	0	4	16
Male 66+	5	0	4	0	0	9
Female child	0	0	3	0	3	6
Female teenager	1	0	0	0	0	1
Female 20 - 40	4	0	7	0	7	18
Female 41 - 65	4	0	5	0	5	14
Female 66+	4	1	4	0	3	12
TOTAL	29	1	38	2	29	99

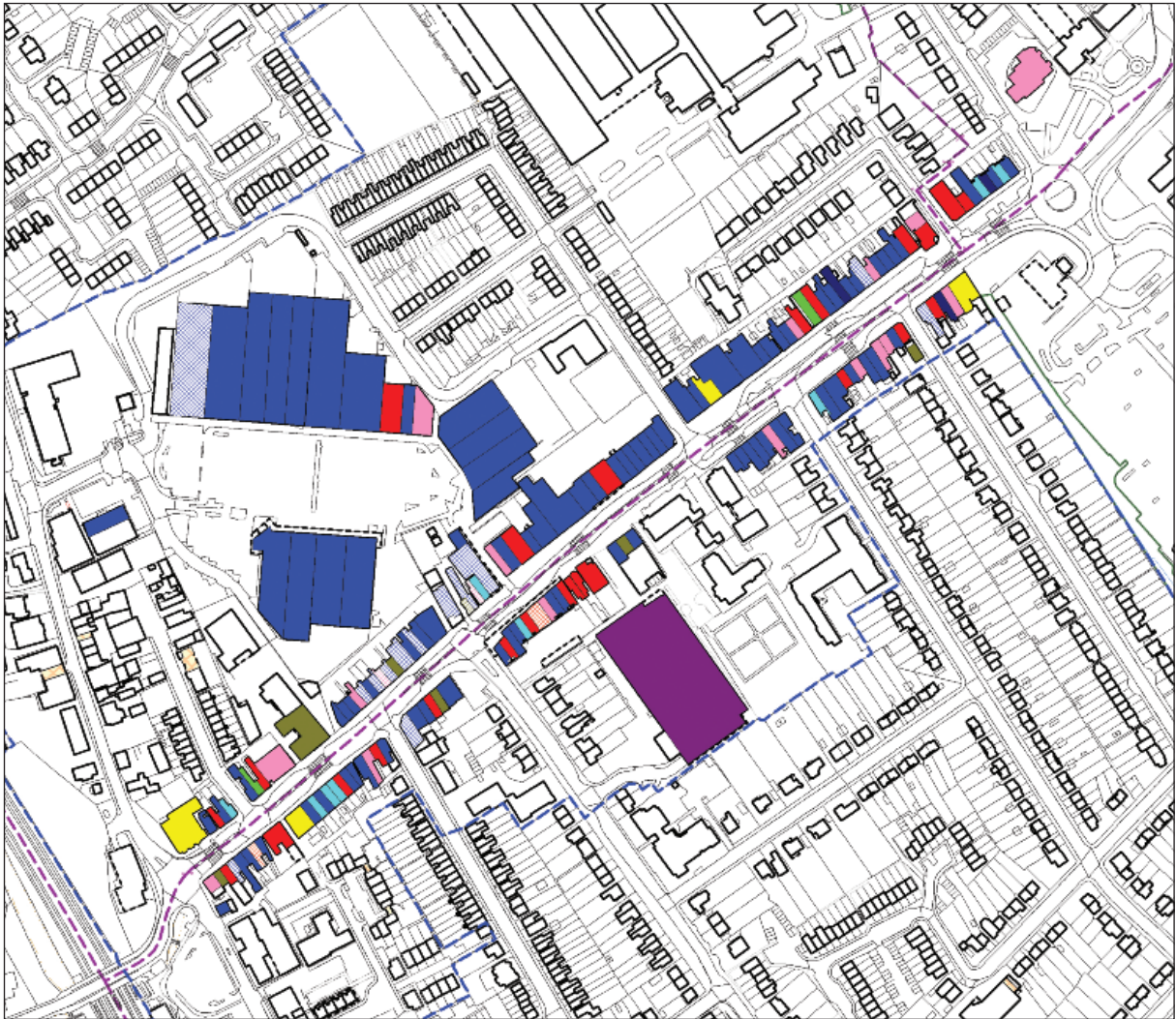
Bushey Heath	Opposite The Rutts	Middle - High Road	Middle - High Road	Howton Place	TOTALS OF AGES
Male child	1	1	2	1	5
Male teenager	0	0	2	0	2
Male 20 - 40	1	9	9	7	26
Male 41 - 65	1	3	6	4	14
Male 66+	0	2	4	1	7
Female child	0	3	5	1	9
Female teenager	1	0	1	0	2
Female 20 - 40	3	16	10	8	37
Female 41 - 65	3	8	8	1	20
Female 66+	2	0	3	1	6
TOTAL	12	42	50	24	128

Appendix I

Retail units: Hertsmere study

Maps showing the nature of retail units in the borough (based on June 2008 Retail Survey)

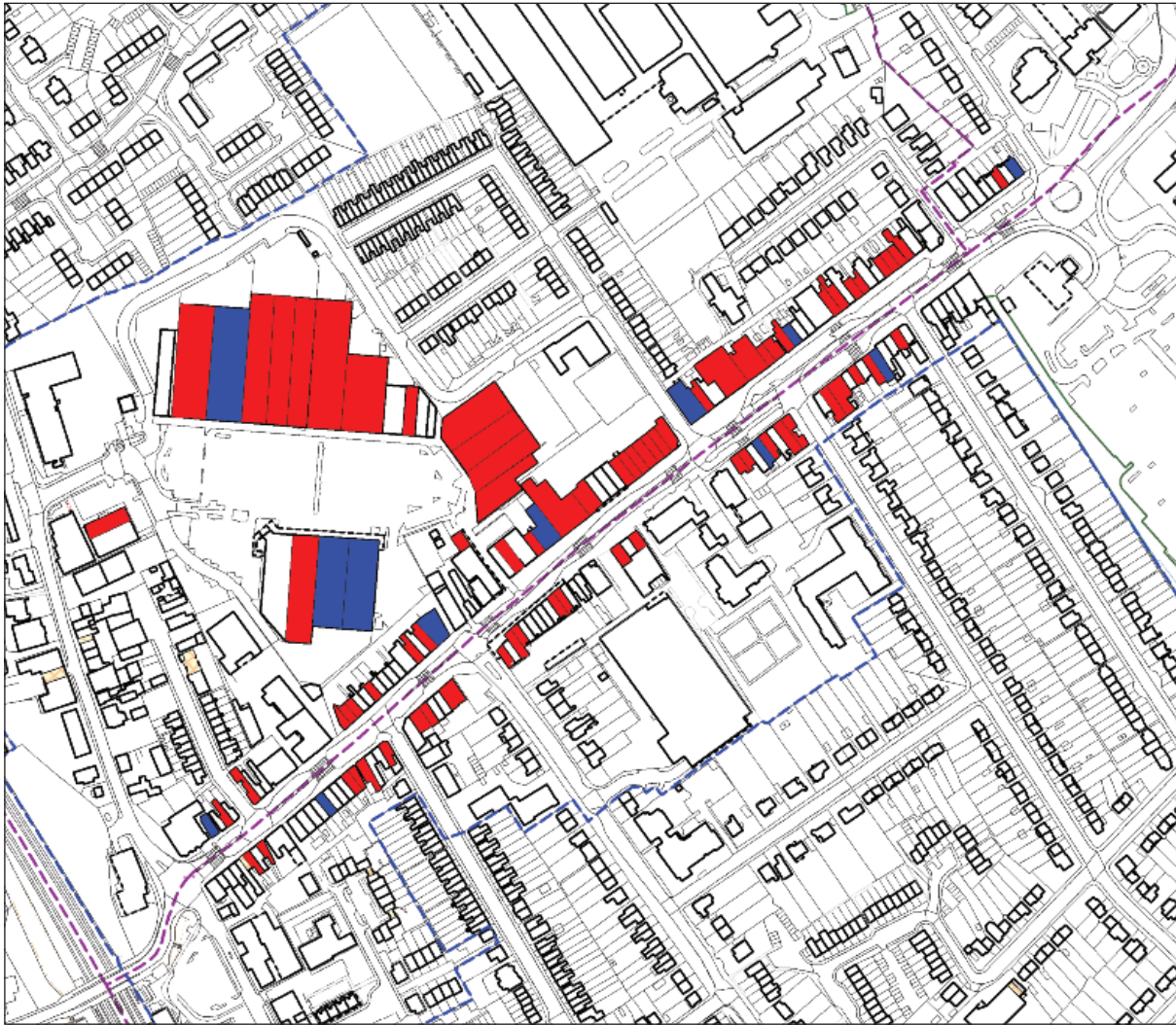
Map K1 - Borehamwood use classes



Key

- | | |
|--|---|
| ■ A1 Shops | ■ D1 Non-residential institutions |
| ■ A1/A3 Shops with an element of A3 use | ■ D2 Assembly and leisure |
| ■ A2 Financial and professional services | ■ SG Sui generis |
| ■ A3 Restaurants and cafes | Vacant A1 units |
| ■ A4 Drinking establishments | Vacant A2 units |
| ■ A5 Hot food takeaways | Vacant A3 units |
| ■ B1 Business light industry | Vacant sui generis |
| ■ B1 (A) Business offices | |

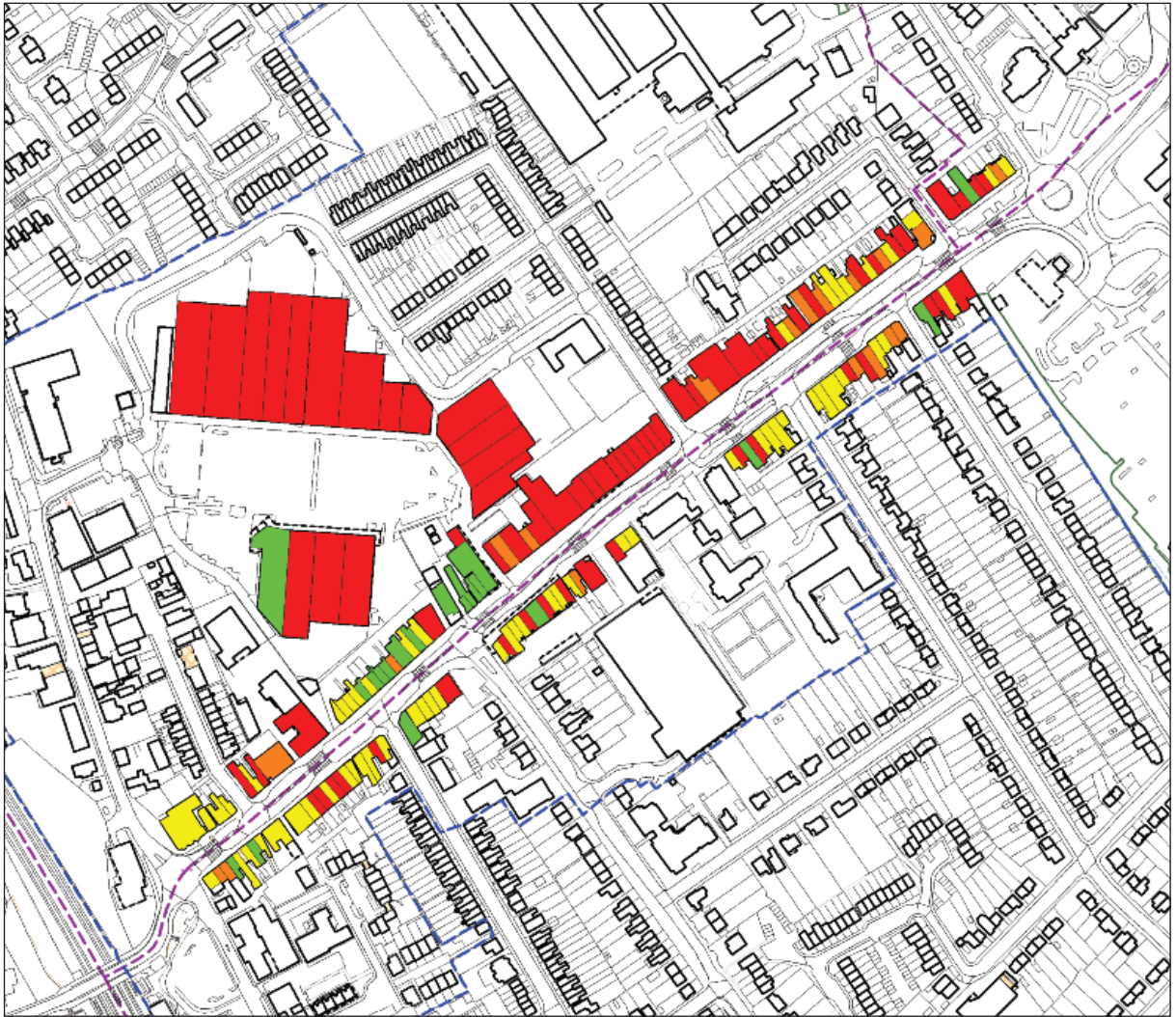
Map K2 - Borehamwood Comparison and convenience units



Key

- Comparison Units
- Convenience Units
- Non-A1 Units

Map K3 - Borehamwood - National and local units



Key

- National
- Local Chain
- Local Only
- Vacant

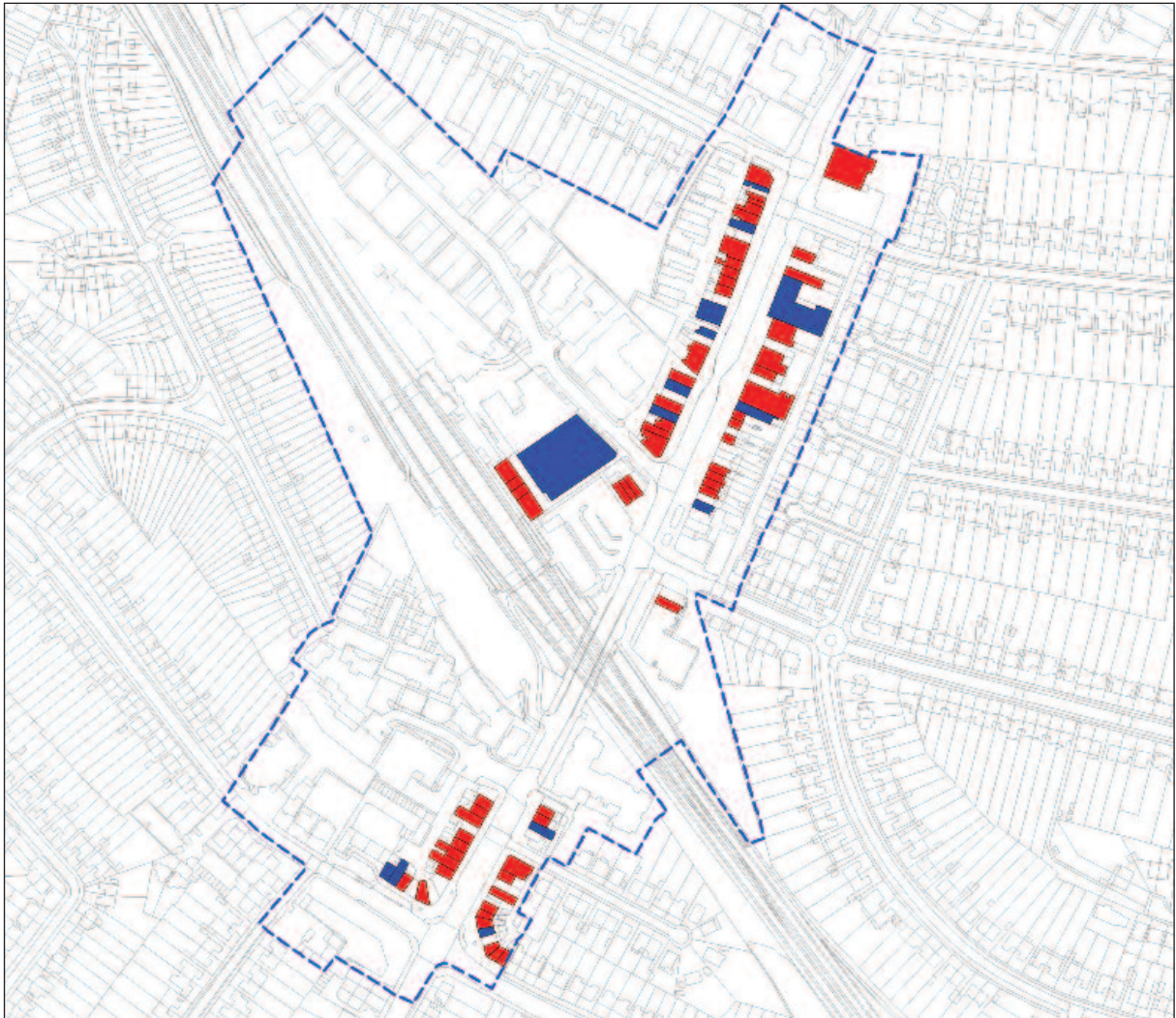
Map K4 - Potters Bar Darkes Lane - use classes



Key

- | | |
|--|--|
| ■ A1 Shops | ■ D1 Non-residential institutions |
| ■ A1/A3 Shops with an element of A3 use | ■ D2 Assembly and leisure |
| ■ A2 Financial and professional services | ■ SG Sui generis |
| ■ A3 Restaurants and cafes | □ Vacant A1 units |
| ■ A4 Drinking establishments | □ Vacant A2 units |
| ■ A5 Hot food takeaways | □ Vacant A3 units |
| ■ B1 Business light industry | □ Vacant sui generis |
| ■ B1 (A) Business offices | |

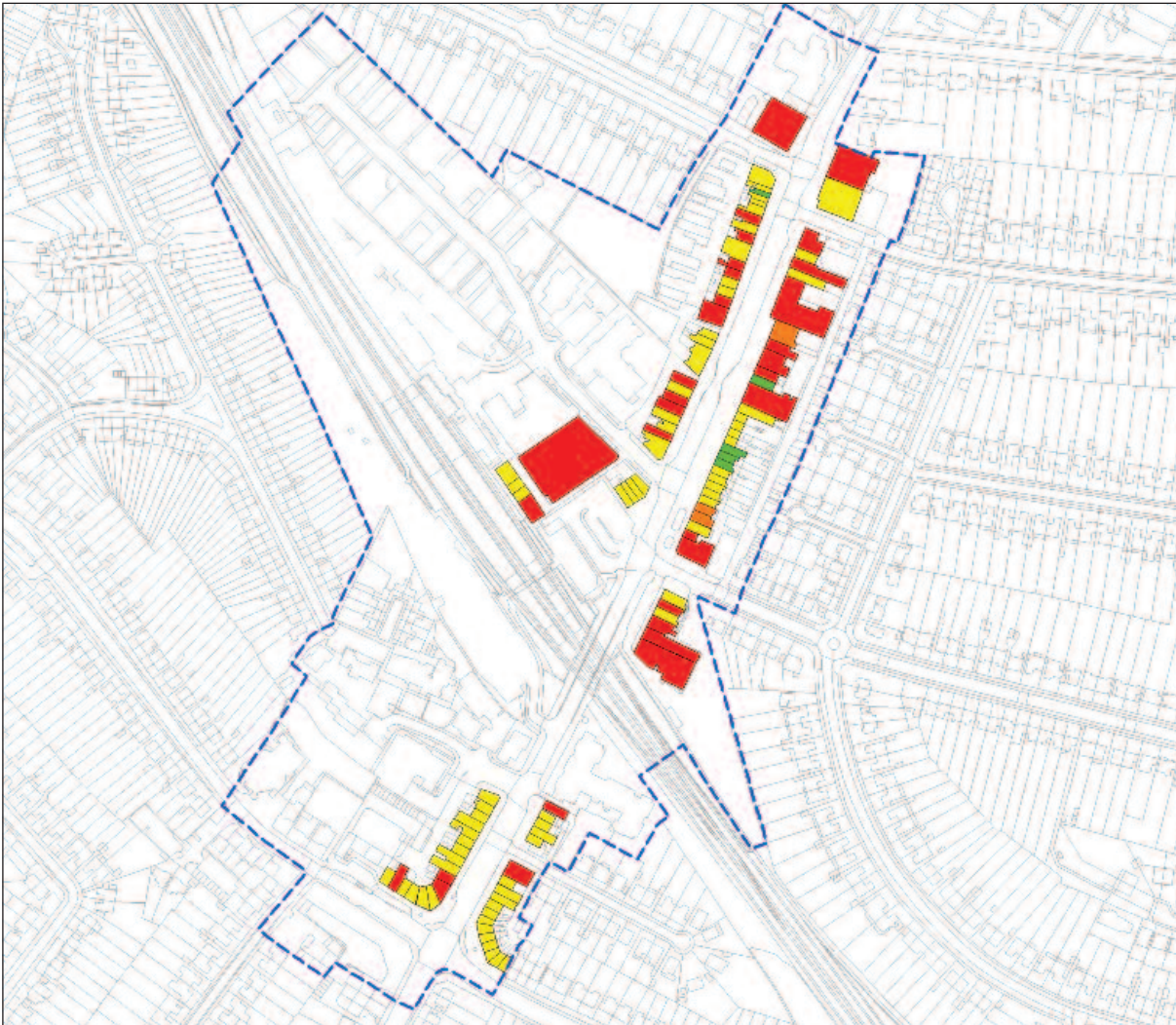
Map K5 - Potters Bar Darkes Lane - Comparison and convenience units



Key

- Comparison Units
- Convenience Units
- Non-A1 Units

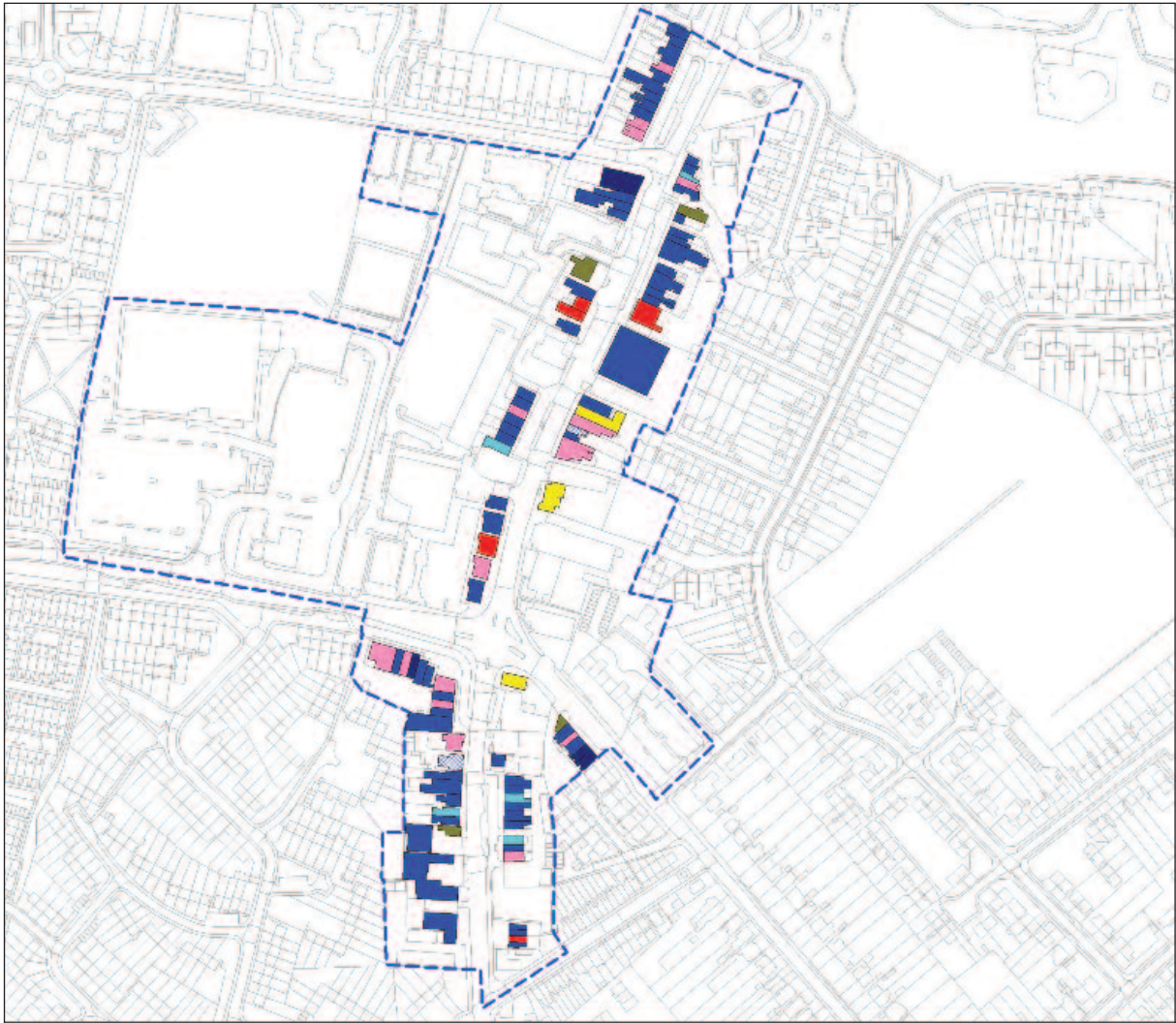
Map K6 - Potters Bar Darkes Lane - National and local units



Key

- National
- Local Chain
- Local Only
- Vacant

Map K7 - Potters Bar High Street - Use class



Key

- | | |
|--|--|
| ■ A1 Shops | ■ D1 Non-residential institutions |
| ■ A1/A3 Shops with an element of A3 use | ■ D2 Assembly and leisure |
| ■ A2 Financial and professional services | ■ SG Sui generis |
| ■ A3 Restaurants and cafes | Vacant A1 units |
| ■ A4 Drinking establishments | Vacant A2 units |
| ■ A5 Hot food takeaways | Vacant A3 units |
| ■ B1 Business light industry | Vacant sui generis |
| ■ B1 (A) Business offices | |

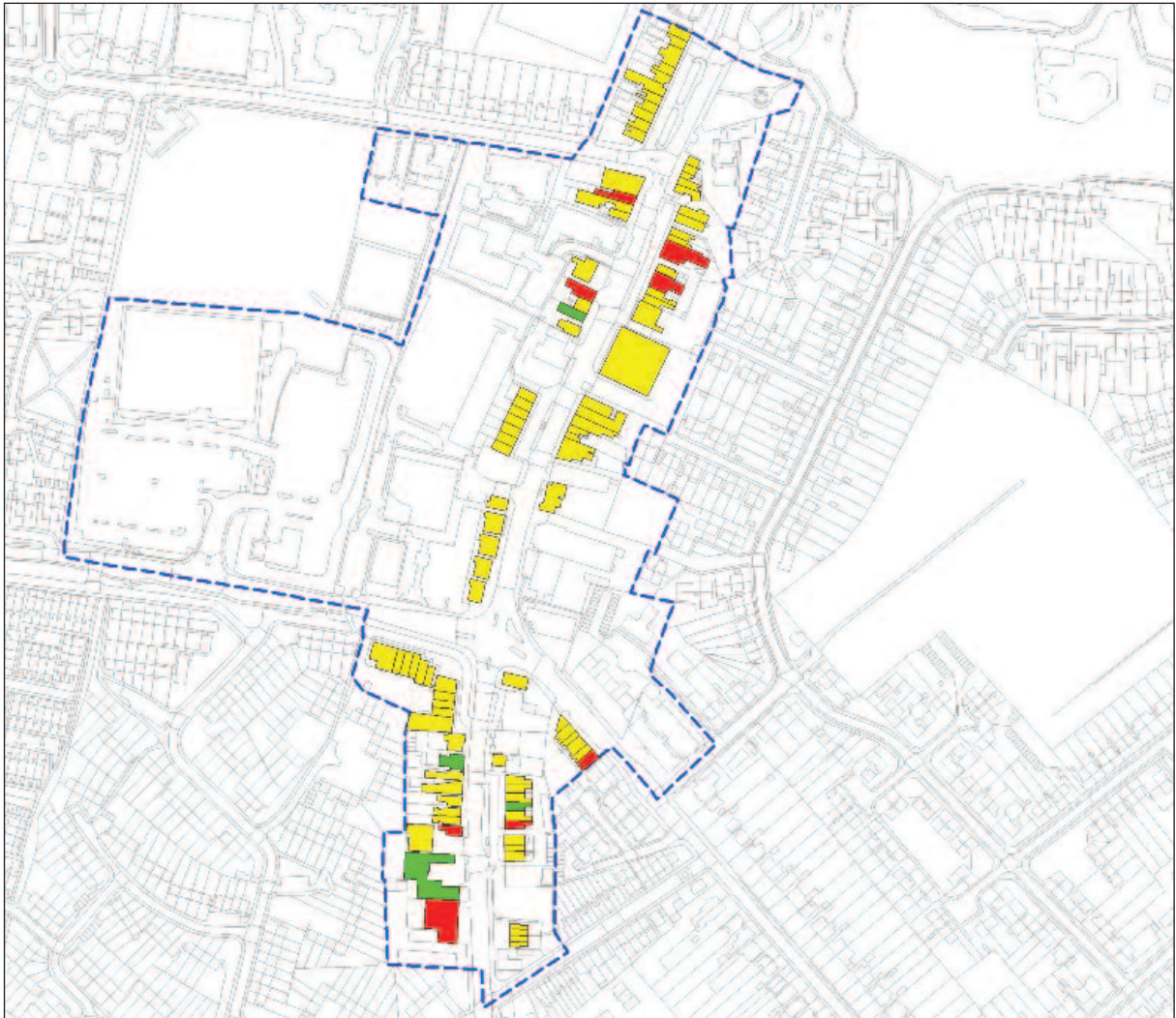
Map K8 - Potters Bar High Street - Comparison and convenience units



Key

- Comparison Units
- Convenience Units
- Non-A1 Units

Map K9 - Potters Bar High Street - National and local units



Key

- National
- Local Chain
- Local Only
- Vacant

Map K10 - Radlett - Use class



Key

- | | |
|--|--|
| ■ A1 Shops | ■ D1 Non-residential institutions |
| ■ A1/A3 Shops with an element of A3 use | ■ D2 Assembly and leisure |
| ■ A2 Financial and professional services | ■ SG Sui generis |
| ■ A3 Restaurants and cafes | □ Vacant A1 units |
| ■ A4 Drinking establishments | □ Vacant A2 units |
| ■ A5 Hot food takeaways | □ Vacant A3 units |
| ■ B1 Business light industry | □ Vacant sui generis |
| ■ B1 (A) Business offices | |

Map K11 - Radlett - Comparison and convenience units



Key

- Comparison Units
- Convenience Units
- Non-A1 Units

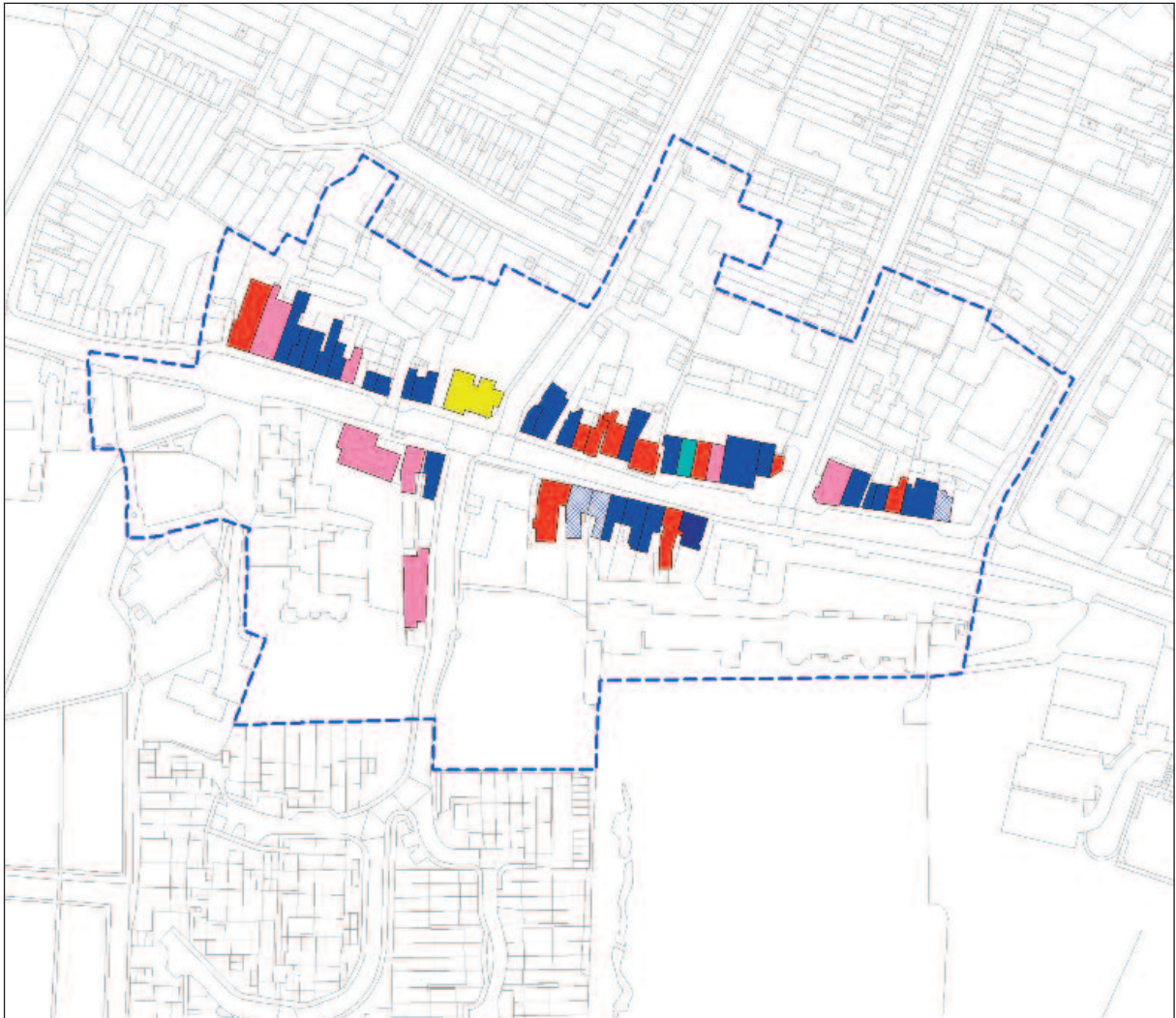
Map K12 - Radlett - National and local units



Key

- National
- Local Chain
- Local Only
- Vacant

Map K13 - Bushey - Use class



Key

- | | |
|--|--|
| ■ A1 Shops | ■ D1 Non-residential institutions |
| ■ A1/A3 Shops with an element of A3 use | ■ D2 Assembly and leisure |
| ■ A2 Financial and professional services | ■ SG Sui generis |
| ■ A3 Restaurants and cafes | Vacant A1 units |
| ■ A4 Drinking establishments | Vacant A2 units |
| ■ A5 Hot food takeaways | Vacant A3 units |
| ■ B1 Business light industry | Vacant sui generis |
| ■ B1 (A) Business offices | |

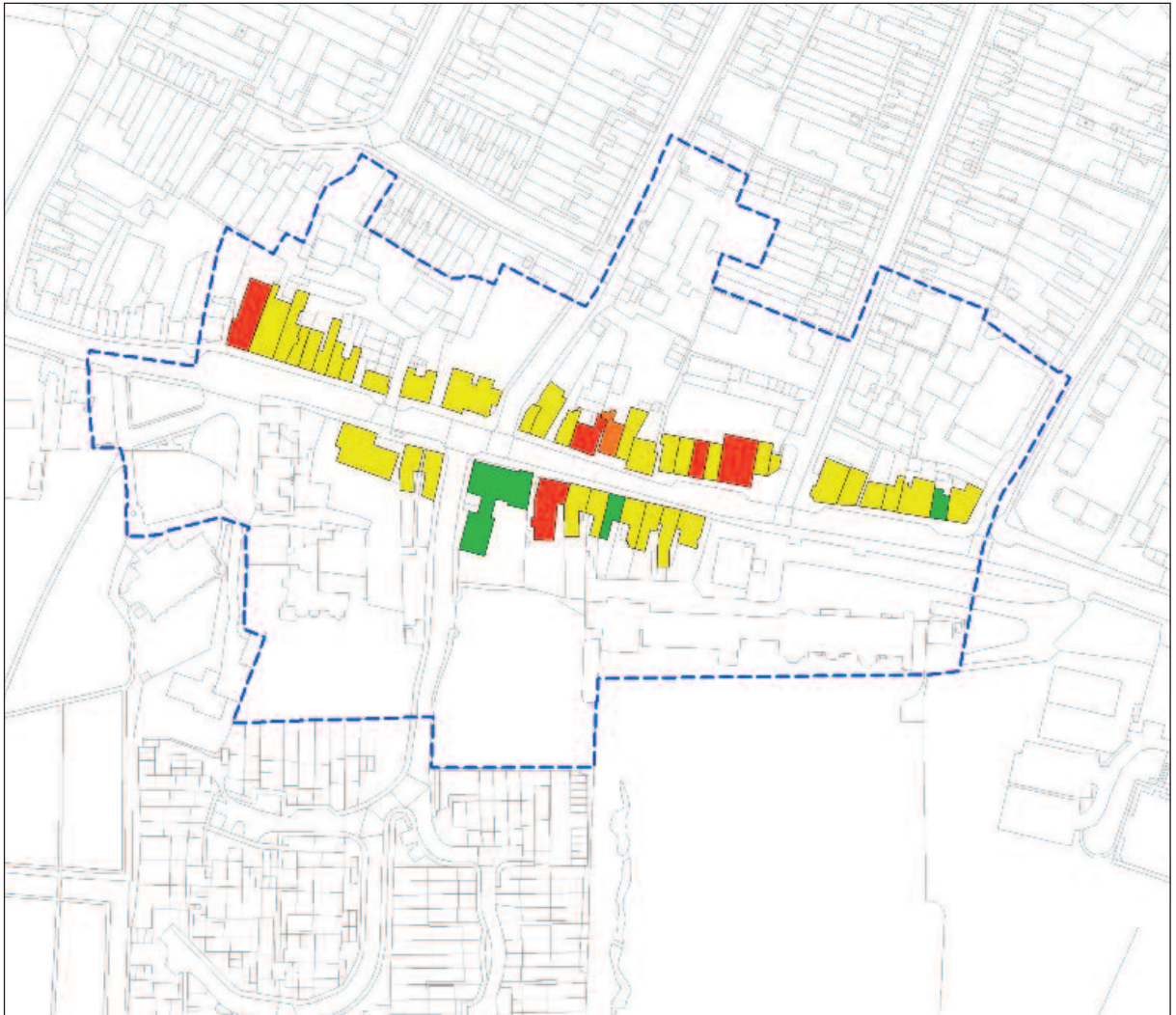
Map K14 - Bushey - Comparison and convenience units



Key

- Comparison Units
- Convenience Units
- Non-A1 Units

Map K15 - Bushey - National and local units



Key

- National
- Local Chain
- Local Only
- Vacant

Map K16 - Bushey Heath - Use class



Key

- | | |
|--|---|
| ■ A1 Shops | ■ D1 Non-residential institutions |
| ■ A1/A3 Shops with an element of A3 use | ■ D2 Assembly and leisure |
| ■ A2 Financial and professional services | ■ SG Sui generis |
| ■ A3 Restaurants and cafes | Vacant A1 units |
| ■ A4 Drinking establishments | Vacant A2 units |
| ■ A5 Hot food takeaways | Vacant A3 units |
| ■ B1 Business light industry | Vacant sui generis |
| ■ B1 (A) Business offices | |

Map K17 - Bushey Heath - Comparison and convenience units



Key

- Comparison Units
- Convenience Units
- Non-A1 Units

Map K6 - Bushey Heath - National and local units



Key

- National
- Local Chain
- Local Only
- Vacant