Retail Study Update

Dacorum Borough Council

October 2011

PREPARED BY

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Date: October 2011
Ref: J:\Planning\Job Files\J026219 - Hemel Hempstead (Borough Retail Update & Major Land Use Study)\Retail\001.Retail Study Update V5-Oct 11.Docx

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Limitations

This document has been prepared for the stated objective and should not be used for any other purpose without the prior written authority of GL Hearn; we accept no responsibility or liability for the consequences of this document being used for a purpose other than for which it was commissioned.

1 INTRODUCTION

1.1 In July 2011, Allies and Morrison/Urban Practitioners (A&M/UP) and GL Hearn were instructed by Dacorum Borough Council to provide retail planning, master planning and commercial property advice in respect of retail and town centre matters. A broad summary of the instruction, which comprised 3 distinct parts was to:

1 Produce a Retail Study Update for the town centres in the Borough using the 2006 Study and 2009 Update as a basis for moving forward; and
2 Develop a Major Land Use Strategy for Hemel Hempstead town centre using the Vision Diagram as a framework for the Strategy; and
3 Develop a Land Use Strategy for Apsley and Two Waters local centre and defined out of centre retail locations.

1.2 This Retail Study Update Report responds to Part 1 of the brief. The principal requirement of which is to provide quantitative forecasts of retail capacity up to 2031 for Hemel Hempstead, Berkhamsted and Tring town centres, and the main out of centre locations within the Borough.

1.3 Establishing the retail capacity or retail need is a requirement placed upon local planning authorities by Planning Policy Statement 4: Planning For Sustainable Economic Growth (PPS4) and forms a key evidence base element in strategy and policy formulation for planning authorities.

1.4 The Retail Study Update comprises the following:

- Section 2 briefly outlines national policy on retailing and town centres;
- Section 3 provides commentary upon the methodology and results of the quantitative retail assessment, the retail assessment calculations are provided in tabular form at **Appendix A**;
- Section 4 provides qualitative health check reviews of Dacorum's main town centres; and
- Section 5 draws together the conclusions of the Study Update regarding the future retail need for Dacorum Borough.

2 RETAIL PLANNING POLICY

Introduction

2.1 This section briefly reviews the national planning policy guidance which relates to retailing and town centre policies. We review both existing policy and the new emerging National Planning Policy Framework.

National Planning Guidance

Planning Policy Statement 1– Delivering Sustainable Development (PPS1)

2.2 Sustainable development is the core principle underpinning planning. Planning should facilitate and promote sustainable and inclusive patterns of development by:

> '*ensuring that development supports existing communities and contributes to the creation of safe, sustainable, liveable and mixed communities with good access to jobs and key services for all members of the community'* (page 2).

2.3 The PPS also advises that planning authorities should:

> *'provide improved access for all to…shops by ensuring that new development is located where everyone can access services and facilities by foot, bicycle or public transport rather than access by car whilst recognising that this may be difficult in rural areas'* (page 11).

Planning Policy Statement 4 – Planning for Sustainable Economic Development (PPS4)

2.4 Planning Policy Statement 4 (PPS4): Planning for Sustainable Economic Development was formally adopted in December 2009 and sets out the Government's key objective for sustainable economic growth. This PPS replaced the previous Planning Policy Guidance 4: Industrial Commercial Development and Small Firms, Planning Policy Guidance 5: Simplified Planning Zones; and PPS6: Planning for Town Centres. This PPS also replaced parts of Planning Policy Statement 7: Sustainable Development in Rural Areas, and parts of Planning Policy Guidance 13: Transport.

2.5 To help achieve sustainable economic development, the Government's objectives set out in PPS4 are to build prosperous communities; reduce the gap in economic growth rates between regions; deliver more sustainable patterns of development; respond to climate change; promote the vitality and viability of town and other centres as important places for communities; and raise the quality of life and the environment.

2.6 Specifically in relation to retailing and town centres the Government's objectives are:

- *'new economic growth and development of main town centre uses to be focused in existing centres, with the aim of offering a wide range of services to communities in an attractive and safe environment and remedying deficiencies in provision in areas with poor access to facilities*
- *competition between retailers and enhanced consumer choice through the provision of innovative and efficient shopping, leisure, tourism and local services in town centres, which allow genuine choice to meet the needs of the entire community (particularly socially excluded groups)*
- *the historic, archaeological and architectural heritage of centres to be conserved and, where appropriate, enhanced to provide a sense of place and a focus for the community and for civic activity*
- *raise the quality of life and the environment in rural areas by promoting thriving, inclusive and locally distinctive rural communities whilst continuing to protect the open countryside for the benefit of all'* (Page 4 – PPS4).

2.7 PPS4 sets out planning policies for economic development centred on: Using Evidence (**Policy EC1**), Plan Making Policies (**Policies EC2** to **EC8);** Monitoring (**Policy EC10**); and Development Management Policies (**Policies EC10** to **EC19**).

2.8 For the purposes of policies set out within this PPS, the definition of economic development is:

> *'economic development includes development within the B Use Classes, public and community uses and main town centre uses'* (Page 2 – PPS4).

2.9 PPS4 further specifies:

> *'the policies also apply to other development which achieves at least one of the following objectives:*

- *Provides employment opportunities*
- *Generates wealth or*
- *Produces or generates an economic output or product'* (Pages 2 and 3)

2.10 From a plan making perspective, PPS4 requires local planning authorities to identify any deficiencies in the provision of local convenience shopping and other facilities which serve people's day to day needs; and assess whether there is a qualitative need for retail facilities based on the provision and distribution of existing facilities and whether these allow genuine choice to meet the needs of the whole community (**Policy EC1**).

2.11 **Policy EC3** requires local planning authorities to set out a strategy for the management and growth of centres over the plan period. This should include inter-alia setting flexible policies which are able to respond to changing economic circumstances; defining a network and hierarchy of centres; set the physical boundaries of existing centres and define primary shopping areas.

2.12 In planning for consumer choice, **Policy EC4** advises that town centres should be pro-actively promoted with recognition of the potential need for diversification; providing a strong retail mix; recognising the contribution of smaller shops; supporting markets and encouraging evening and night time activities within town centres.

2.13 Where a need for additional floorspace arises, local authorities are required to identify a range of sites to accommodate that identified need based upon the following factors:

- The identified need for development
- The scale of development is appropriate to the role and function of the centre
- Apply the sequential approach
- Assess the impact of sites – existing centres
- Consider the extent to which other considerations such as physical regeneration may be material.

2.14 Development Management Policies within PPS4 provide guidance and criteria which must be achieved by applications for economic development in particular the following must be addressed:

- **Policy EC10.2** sets out wider sustainability, accessibility, design and regeneration considerations which all planning applications for economic development should be assessed against.
- Determining planning applications for economic development (other than main town centre uses) not in accordance with an up to date development plan (**Policy EC11**);
- Determining planning applications for economic development in rural areas (**Policy EC12**);
- Determining planning applications affecting shops and services in local centres and villages (**Policy EC13**);
- Supporting evidence for planning applications for main town centre uses (**Policy EC14**);
- The consideration of sequential assessment for planning applications for main town centre uses that are not in a centre and not in accordance with an up to date development plan (**Policy EC15**);
- The impact assessment for planning applications for main town centre uses that are not in a centre and not in accordance with an up to date development plan (**Policy EC16**);
- The consideration of planning applications for development of main town centre uses not in a centre and not in accordance with an up to date development plan (**Policy EC17)**;
- Application of car parking standards for non-residential development (**Policy EC18**); and
- The effective use of conditions for main town centre uses (**Policy EC19**).

Draft National Planning Policy Framework

2.15 The new Coalition Government has made clear its intention to replace the existing planning policy and control approach with a streamlined and simplified system, giving an overriding presumption in favour of sustainable economic growth. The intended abolition of the regional tier of planning together with the progression of The Localism Bill and now the publication of Draft National Planning Policy Framework are clear signals of this change.

2.16 The National Planning Policy Framework is considered by the Government to be a simpler framework for the planning system intended to replace existing PPS and PPG policy guidance once adopted.

2.17 In terms of retailing The Framework confirms the Government is fully committed to supporting town centres and protecting high streets. The Framework makes clear that town centres should be recognised as the heart of communities, with Local Authorities required to pursue policies that support the vitality and viability of town centres. The Framework maintains the town centre first approach and only where suitable sites are not available should edge, then out of centre sites be contemplated.

2.18 As currently drafted, the National Planning Framework has limited detail upon retail and town centre matters and provides a very brief summary of key considerations (Sequential Approach and Impact Test). This therefore places the emphasis upon policy formulation at a local level to provide a policy framework which identifies acceptable developments and sets clear development control criteria to ensure any applications are fully assessed and local impact matters are reviewed.

Conclusions on Policy

2.19 There is a clear shift toward a simplified national policy. This does not necessarily mean that it should be construed as an 'opening-up' of planning, rather the less prescriptive national framework means that local authorities will have to set appropriately detailed local policies to shape and control developments in their local areas. In terms of retailing, the focus for development remains town centres and a policy led approach which draws upon the current PPS4 'tests' with local input is in our view appropriate.

3 QUANTITATIVE ASSESSMENT OF RETAIL CAPACITY

Introduction

3.1 In this section we provide details of the methodology and data inputs used to calculate retail capacity and then go on to provide the results of those retail capacity calculations, providing estimates of potential turnover capacity and future floorspace need for Hemel Hempstead, Berkhamsted and Tring up to 2031.

Methodology

3.2 The retail capacity calculations provide an update to the earlier Dacorum Retail Study Update (2009) undertaken for the Council by DTZ.

3.3 In preparing this update study, GLH have adopted the same Study Area and Study Zones (see **Map 1**) as those used by DTZ. We have also used the household telephone survey results from the 2009 Study which provides details of where residents in the Study Area shop for food (convenience) and non-food goods (comparison). We have however undertaken our own detailed analysis of the household survey results to establish shopping patterns (see **Appendix A**, Tables 4 and 6 main and top-up food shopping and Tables C1 and C8 non food shopping patterns) and the market shares for Dacorum's shopping facilities.

3.4 The retail capacity tables provided at **Appendix A** set out our step-by-step approach to calculating quantitative retail capacity. Tables 1 to 18 provide the convenience goods based calculations and Tables A to J the comparison based goods calculations.

3.5 In broad terms, the steps involved in calculating the quantitative retail capacity are:

A. Establish study area population.
B. Establish consumer spending potential on retail goods in study area over study years.
C. Establish 'market shares' of existing retail facilities (base line).
D. Apply 'market shares' to available spending to derive implied turnovers for existing facilities for the base line position and future study years.
E. Estimate floorspace and benchmark turnovers for existing shopping facilities.
F. Compare implied market share turnovers to benchmark turnovers to identify retail capacity (overtrading) or under trading (no capacity).

G. Make allowance for any commitments or plan proposals from the capacity established.

3.6 The quantitative capacity calculations require careful interpretation and should be supported by a qualitative review of existing centres and facilities to verify trading performance.

3.7 In addition, whilst forecasts are provided to 2031, limited reliance should be placed on expenditure and capacity estimates over these longer time horizons and certainly beyond 10 years. PPS4 guidance is clear in its advice that retail capacity should be regularly reviewed and updated at least every 5 years.

Study Data Inputs

3.8 In preparing the Retail Study Update, we have sought to use the latest available data and information on population and forecast population change; consumer expenditure estimates and projected consumer spending growth; retailers trading performance and their benchmark turnover levels; and the share of consumer spending transacted in non-store based businesses (also known as special forms of trading). These study inputs are explained in turn below.

Population

3.9 The population estimates for the Study Area have been based upon housing forecasts for Dacorum Borough provided by the Council. These forecasts are based upon the housing option 2 of the draft Core Strategy which aims to deliver 430 new dwellings per year in the Borough.

3.10 The distribution of the housing development (and consequent population growth) has been advised by the Borough's officers. The housing growth is focused predominately upon Hemel Hempstead (Study Zones 1 and 3), with lesser growth in Berkhamsted (Zone 5) and Tring (Zone 7).

3.11 The Study Area is based upon postal code geography, however this is not coterminous with the Borough Boundary for Dacorum and there are parts of the Study Zones and overall Study Area which are outside the Borough. As a consequence, it is not possible to directly compare the overall population of Dacorum Borough with the population within our Study Zones and overall Study Area.

3.12 Where study zones are outside Dacorum, information on population change has been derived from ONS and is based upon their mid-year estimates and projections. Population estimates over the Study Period are set out in Table 1, **Appendix A**.

Consumer Retail Expenditure

3.13 Local area consumer spending data has been obtained from Experian's MMG3 Retail Planner GIS. The expenditure has a 2009 base year and is in 2009 prices.

3.14 The 2009 expenditure is grown year on year using long term and ultra long term trend based expenditure growth estimates published by Experian (Retail Planner Briefing Note 8.1). The annual growth rates adopted are:

Convenience goods	+0.7% PA
Comparison goods	+4.7% PA

Existing Retail Floorspace and Benchmark Trading

3.15 The existing retail floorspace for Hemel Hempstead, Berkhamsted, Tring and retail warehouses and major foodstores has been based upon the previous 2009 study with updating provided by the Council. For example, the former out-of-centre MFI site at Hemel Hempstead has been removed from the analysis as it is long term vacant and is in a very poor condition and the former Budgens, Tring is now trading as an M&S Simply Food.

3.16 The trading densities for the existing floorspace has where possible been taken from published sources (Mintel's Retail Rankings and Verdict's). These published sources provide trading densities on a 'business basis' for retailers. As retail planning analysis is concerned with the class of goods and should adopt a goods based approach some adjustments are necessary to the published figures to take account of convenience and comparison goods sales mix by food and grocery retailers. Allowances and reconciliations are also made to take account of VAT price base.

3.17 The existing floorspace and benchmark turnovers are set out in Tables 16 (convenience) and Table G (comparison) at **Appendix A**. An allowance has been made for the benchmark turnovers of existing facilities to improve year on year. The growth rate applied is:

Convenience trading efficiency	0.25% p.a.
Comparison trading efficiency	1.5% p.a.

Special Forms of Trading

3.18 We have treated both existing and future consumer spending by online and mail order channels differently to the earlier Dacorum Retail Study work prepared by DTZ. DTZ's approach was to apply published national figures for special forms of trading (SFT).

3.19 However, we have sought to reflect the local use of the internet, mail order shopping and markets by using the household survey results to establish the local market share of these shopping channels in the Study Area. Having established the base line market share of these facilities, we then allow for a future portion of the growth in expenditure to be directed to internet shopping and mail order.

3.20 The relative success of internet based shopping and its adoption as an accepted shopping medium by consumers does suggest that it will continue to take a share of consumer spending which might otherwise have been spent at traditional shopping floorspace. Commentators on internet based shopping show little consensus upon how much the e-tailing sector may grow and when it will reach maturity.

3.21 In acknowledging that the internet has got the potential to grow as a shopping channel and that this growth will be at the expense of traditional high street spending, our estimates of future consumer retail spending have made an allowance for this growth over and above the existing market share we have assigned. The growth per annum from the 2009 base line which we have allowed is 0.05% per annum on convenience goods and 0.5% per annum on comparison goods. This growth in internet spending is deducted from the total available spending in future study years and is therefore not available to support existing or future traditional retail floorspace in the capacity analysis.

3.22 It is noteworthy that the use of internet and mail order by residents within the study area is strong on comparison goods shopping particularly for books, dvd's, music and consumer electronics. For food shopping the study area exhibits similar levels of usage to national rates.

3.23 Table 3A and Tables C1 to C8, **Appendix A** set out the internet/mail order market shares across the Study Zones and Study Areas.

Quantitative Retail Capacity

3.24 Retail capacity or the need for additional floorspace arises where the turnover potential available in an area exceeds the benchmark turnover of existing retail facilities in that area. This is a theoretical exercise and the ability of existing floorspace to absorb additional spending (particularly non food comparison shopping) before overtrading conditions arise means that whilst there maybe turnover capacity for additional floorspace this will not in all circumstances result in a need for more floorspace as existing floorspace can trade more intensively (and profitably).

Convenience Goods Shopping Need Analysis

3.25 The key convenience goods shopping capacity analysis is provided in Tables 16, 17 and 18 at **Appendix A**.

3.26 Table 16 sets out the benchmark turnovers for the convenience shopping facilities in Dacorum Borough providing theoretical estimates of their future benchmark turnovers up to 2031.

3.27 Table 17 compares the implied market share turnovers of convenience facilities for each of the study years with the corresponding benchmark turnover. The difference between the implied and benchmark is theoretical capacity. A positive value is capacity/overtrading and a negative value is undertrading which suggests there is no need for additional floorspace.

3.28 Table 17 illustrates over trading is occurring within some of the main food stores (in 2009):

Asda, Hillfield Road	+£7.783m
Tesco, Jarman Way	+£15.391m
Sainsbury, Apsley	+£4.617m
Tesco, Tring	+£9.442m

3.29 On a centre by centre basis, the capacity analysis shows facilities to be both under and overtrading, when these are all added together it shows the following convenience goods turnover capacity across the study years.

DACORUM CONVENIENCE GOODS TURNOVER CAPACITY 2009 - 2031

	Turnover Capacity in Year					
	2009	2011	2016	2021	2026	2031
	£M	£M	£M	£M	£M	£M
Hemel Hempstead TC	£2.804	£3.452	£6.759	£9.786	£12.988	£16.364
Hemel Hempstead Non Town Centre & Major Stores	£17.834	£19.547	£28.299	£36.293	£44.740	£53.662
Hemel Hempstead Non Town Centre Others	-£2.420	-£2.160	-£0.501	£0.970	£2.528	£4.171
Hemel Hempstead - Total	£18.218	£20.839	£34.557	£47.049	£60.256	£74.197
Berkhamsted - Total	£2.802	£2.943	£5.271	£7.231	£9.296	£11.456
Tring - Total	£3.361	£3.447	£5.063	£6.400	£7.808	£9.274
Others in Dacorum Borough - Total	£0.000	-£0.001	£0.264	£0.474	£0.695	£0.924

3.30 By applying a trading density appropriate for a major grocery retailer to the convenience turnover capacity estimates the following convenience goods retail floorspace need is calculated.

DACORUM CONVENIENCE GOODS FLOORSPACE POTENTIAL 2009 – 2031

	Turnover Capacity as Sales Floorspace (Indicative)					
	2009	2011	2016	2021	2026	2031
	sqm	sqm	sqm	sqm	sqm	sqm
Hemel Hempstead TC	224	276	541	783	1,039	1,309
Hemel Hempstead Non Town Centre - Major Stores	1,427	1,564	2,264	2,903	3,579	4,293
Hemel Hempstead Non Town Centre - Others	nil	nil	nil	78	202	334
Hemel Hempstead - Total	1,651	1,840	2,805	3,764	4,820	5,936
Berkhamsted - Total	224	235	422	578	744	916
Tring - Total	269	276	405	512	625	742
Others in Dacorum Borough - Total	nil	nil	21	38	56	74

3.31 Theoretical capacity is strongest at the out-of-centre retail facilities around Hemel Hempstead. However, the Council may wish to direct this capacity onto a more central site or sites in Hemel Hempstead town centre. This would have the potential effect of establishing more sustainable locations for main food shopping and attracting greater numbers of shoppers into Hemel Hempstead town centre, improving the potential for linked shopping trips which would act to bolster the whole of the town centre.

3.32 We have not directly factored in the Tesco (Jarman Fields) extension permission. This is an extension to an established store with a mature trading catchment. We do not consider that the extension will lead to significant levels of trade diversion from other stores, rather it is a qualitative measure which will act to relieve existing over trading in the store. In reducing overtrading the Tesco store extension will reduce the potential floorspace capacity levels in the out of centre stores.

3.33 There is limited quantitative need for additional convenience floorspace in either Berkhamsted or Tring in the short/medium term and on the basis of these calculations it is not considered necessary for the Council to be seeking to allocate sites to address any particular convenience need or deficiency in either of these towns.

Comparison Goods Shopping Need Analysis

3.34 The key analysis tables for the comparison goods capacity analysis are G, H and J at **Appendix A**.

3.35 Table G sets out the floorspace and benchmark turnovers of existing facilities.

3.36 Table H compares implied market share turnovers with the benchmark turnovers for the study years. This shows that there is no immediate theoretical capacity for additional comparison goods floorspace in 2011. By 2016 capacity emerges across all of Dacorum's centres, although the need is modest. By 2021 the comparison retail capacity in Hemel Hempstead is more significant Table J provides estimates of the level of floorspace which arises. Thus:

DACORUM COMPARISON GOODS FLOORSPACE POTENTIAL 2009 – 2031

	Turnover Capacity as Floorspace (Indicative)					
	2009	**2011**	**2016**	**2021**	**2026**	**2031**
	sqm	sqm	sqm	sqm	sqm	sqm
Hemel Hempstead TC	nil	nil	2,562	10,120	20,019	32,653
Hemel Hempstead Retail Warehouses & Major Foodstores	nil	nil	2,254	5,430	9,568	14,830
Hemel Hempstead - Total	nil	nil	4,816	15,550	29,587	47,483
Berkhamsted	nil	nil	498	1,842	3,602	5,848
Tring	nil	nil	347	923	1,675	2,632

3.37 The out-of-centre provision in Hemel Hempstead shows 'overtrading' in 2016 and beyond. This is not necessarily a clear indication of the additional need for out of centre retail provision rather this is overtrading. However, the planning permission for 4 additional retail warehousing units at Jarman Park (6,700 sqm gross) would act to address this overtrading should the development come forward. New floorspace within Hemel Hempstead town centre to reinforce its retail role and potential could act to reduce the overtrading of the out-of-centre facilities and establish more town centre focused market shares and sustainable patterns of shopping.

3.38 The other comparison goods shopping floorspace commitments that exist are:

- The former Kodak site redevelopment (1,630 sqm) to provide A1 to A3 uses – built but remains vacant.
- Planning permission at Apsley Local Centre (350sqm).
- Comparison goods element of Tesco, Jarman Way extension permission (1,200sqm).

3.39 These are in our view for locally based shopping and potentially retail service uses and will not alter existing shopping patterns to any significant degree. As a consequence we have not specifically sought to adjust the main market share based capacity assessments to reflect these relatively modest changes to shopping offer.

4 QUALITATIVE HEALTH CHECK REVIEW OF DACORUM'S TOWN CENTRES

Introduction

4.1 Detailed health checks for each of the centres assessed against the PPS4 indicators of vitality and viability are provided at **Appendix B**. In this section we briefly summarise the main findings of our health checks of Hemel Hempstead, Berkhamsted and Tring town centres. Maps prepared by Dacorum Borough Council that show the mix of uses in each of the three town centres are also included at the end of each respective health check.

Hemel Hempstead

4.2 Our review of the various indicators of vitality and viability for Hemel Hempstead indicate that the centre is in reasonable health. Pedestrian flows are viable around both the Riverside and Marlowes Shopping Centres but tail off towards the northern end of the new town. This is mirrored also in terms of environmental quality where the northern part of the Marlowes requires some environmental upgrading and improvement.

4.3 In terms of retail diversity, Hemel Hempstead has a reasonable range and choice of comparison goods shops.

4.4 Its existing convenience, particularly main food offer is more limited and a food superstore would improve provision and could be a motivator of visits to the town centre and provide linked shopping trip benefits.

4.5 Vacancy rates within the centre are comparable to the national average rate and it is noteworthy that vacancies are spread throughout the centre than concentrated in a particular area.

4.6 Rental levels, in line with the retail economy and national position are at best static.

4.7 With regard to trading performance, our overall impression is that Hemel Hempstead town centre trades at viable levels and there is scope for the existing floorspace to trade more intensively, particularly the non-food stores.

4.8 Hemel Hempstead Old Town is a separate and distinct part of the wider town centre's overall offer. The Old Town is attractive and has primarily a service and niche retail focus with its range of social and evening uses complementing the new towns retail based role.

Berkhamsted

4.9 Berkhamsted is a linear town centre which is attractive and well used by its local population. Its retail function is predominately focused upon convenience (food) offer, with little comparison goods shopping save for predominately boutique type retailing. The centre also has a good range and choice of retail services, particularly eating and drink establishments.

4.10 The vitality and viability indicators reviewed at **Appendix B** point to a healthy town centre. Vacancy rates in particular are low and the environmental quality of the town is very good.

4.11 In terms of trading performance, the main convenience stores within the town looked to be performing well and the comparison traders also appeared to be achieving reasonable levels of custom.

4.12 Given the historic and linear nature of Berkhamsted it is somewhat constrained and its potential to expand upon the existing level of retail provision is in our view limited. There is however a site identified within the Local Plan comprising land off High Street and Water Street which is designated for a town centre redevelopment scheme to include a foodstore.

Tring

4.13 Tring town centre is in our view performing its role as convenience and service centre well and is in good health.

4.14 At the time of our survey work, there were no vacant premises within the town centre and there appeared to be viable levels of pedestrian flow throughout the centre.

4.15 Whilst both convenience and comparison goods shopping provision in Tring is relatively limited, the centre does have a mix of retail and service provision which makes it a viable shopping destination and does appear to be well supported by its local population.

4.16 Main food shopping in Tring is focused predominately upon the out-of-centre Tesco store which is considered to be trading well.

5 CONCLUSIONS

5.1 This Retail Study Update has considered primarily the quantitative need for additional retail floorspace up to 2031 (the end of the Plan Period). We have also briefly reviewed the qualitative provision in the main centres, Hemel Hempstead, Berkhamsted and Tring to verify trading performance and provide a qualitative dimension to our retail need analysis.

5.2 The retail market share and trading performance analysis points to a demonstrable need for additional convenience goods floorspace to serve Hemel Hempstead. Much of the theoretical capacity arises from the strong trading of the main out of centre stores serving Hemel Hempstead. In adopting a sequential approach to addressing the identified need, we would advise the Council to seek to direct this convenience floorspace need onto a central site in Hemel Hempsted town centre where it will improve the existing level of food shopping; attract more shoppers into the town centre more regularly; creating potential linked trip benefits and achieving more sustainable town centre focused patterns of shopping.

5.3 The theoretical need (in 2016) is for around 2,260 sqm (sales) of convenience floorspace, which with some ancillary non food floorspace would equate to a superstore of approximately 2,800sqm sales or 4,300sqm gross. The need increases over a longer time frame.

5.4 Whilst our calculations show a theoretical capacity for additional comparison shopping to serve Hemel Hempstead over the study period, we would not in the short to medium term recommend making any specific allocation for this floorspace. There remains vacant floorspace in both the Marlowes and Riverside Shopping Centres and we consider that the existing floorspace is capable of trading more intensively. We would suggest that the Council monitor the take up of vacant premises and trading performance of the existing stores in the town centre and only when marked improvements are noted should the capacity and need for additional comparison shopping be revisited.

5.5 The assessment of need for additional retail provision to serve Berkhamsted suggests only modest requirements for both convenience and comparison goods floorspace. The level of requirement does not in our opinion require any specific allocation in the short/medium term to 2016/2021.

5.6 Similarly, the retail need in Tring, like Berkhamsted is modest and does not in our opinion require any specific allocation to address any quantitative or qualitative deficiency.

5.7 The retail capacity for both Berkhamsted and Tring should be reviewed again within the next 5 years (along with Hemel Hempstead) in accordance with the guidance in PPS4.

Appendix A

Quantitative Retail Capacity Analysis Tables

Dacorum Borough Council

Retail Study Update

October 2011

Table 1 : Population

Zone	2009	2011	2016	2021	2026	2031
1	60,801	61,978	64,919	67,861	70,803	73,745
2	30,760	30,826	30,990	31,155	31,320	31,484
3	23,230	23,882	25,512	27,141	28,771	30,401
4	9,784	9,841	9,983	10,125	10,268	10,410
5	23,897	24,102	24,614	25,126	25,638	26,150
6	24,735	25,183	26,363	27,586	28,705	29,294
7	17,433	17,547	17,831	18,115	18,399	18,683
8	18,470	18,572	18,742	18,963	19,197	19,369
Total	209,110	211,930	218,954	226,072	233,100	239,535

Notes: Z1 predominately Dacorum, small parts in Three Rivers and St Albans
Z2 predominately Dacorum, part in Three Rivers and small part in St Albans
Z3 Dacorum, very small part in South Beds
Z4 predominately Dacorum, part in St Albans
Z5 Dacorum, very small part in South Beds
Z6 Chiltern
Z7 predominately Dacorum
Z8 Aylesbury Vale

Based upon housing forecasts from Dacorum BC and ONS projections.
2009 base population derived from Experian MMG3 Retail Planner Local Area Report

Housing Numbers Provided By Dacorum BC

Settlement	Zone	Additional housing 2006-2031 (Core Strategy Option 2)	Already built (2006-2010)	Urban Capacity	Local Allocation/Strategic Site	Expected by 2016
Hemel Hempstead	1 & 3	8,800	880	7,530	1,280 (over 3 LAs)**	2,218 (all zone 1)
Berkhamsted	5	1,200	384	940	260 (1 LA, 1 SS)	330
Tring	7	480	63	330	150	
Bovingdon	2 & 3*	150	19	90	60	
Kings Langley	2	100	23	100	-	
Markyate	4	190	21	110	80 (SS)	130
Rest of Borough	N/A	400	60	N/A	N/A	

**Vast majority of Bovingdon is within zone 2, and the part that of zone 3 it falls within is the narrow bit at the southern end.*

The housing numbers provided by DBC have been used to estimate the annual population arising from the housing forecasts on a zone by zone basis. The analysis adopts the the housing numbers (2006-2031), makes allowance for those already built (by 2010) and a pro-rata anual build rate is derived. A household formation/composition rate of 2.4 persons is applied to get to an annual population change. This is then applied to the 2009 population base for each zone derived from Experian to estimate the populations in each of the study zones for the study years.

Where study zones are outside Dacorum, information on population change has been derived from ONS and is based upon their mid-year estimates and projections

Table 2A : Expenditure Per Head - Convenience

Zone	2009	2011	2016	2021	2026	2031
1	£1,834	£1,860	£1,926	£1,994	£2,065	£2,138
2	£1,902	£1,929	£1,997	£2,068	£2,141	£2,217
3	£1,828	£1,854	£1,919	£1,988	£2,058	£2,131
4	£1,901	£1,928	£1,996	£2,067	£2,140	£2,216
5	£1,963	£1,991	£2,061	£2,134	£2,210	£2,289
6	£1,916	£1,943	£2,012	£2,083	£2,157	£2,234
7	£1,958	£1,986	£2,056	£2,129	£2,205	£2,283
8	£2,101	£2,131	£2,206	£2,284	£2,366	£2,449

Notes: *2009 goods based consumer expenditure per head derived from Experian Business Strategies Retail Planner Reports for each zone*

Annual growth in expenditure of 0.7% year on year. Long term trend, Figure 2, Experian Retail Planner Briefing Note 8.1

Table 3A : Conveneince Goods Expenditure Potential

Zone	2009	2011 net SFT	2016 net SFT	2021 net SFT	2026 net SFT	2031 net SFT
1	£111.509	£115.149	£124.582	£134.510	£144.954	£155.937
2	£58.506	£59.395	£61.676	£64.043	£66.497	£69.043
3	£42.464	£44.225	£48.797	£53.622	£58.710	£64.074
4	£18.599	£18.951	£19.858	£20.803	£21.789	£22.817
5	£46.910	£47.929	£50.557	£53.306	£56.180	£59.184
6	£47.392	£48.880	£52.853	£57.124	£61.395	£64.713
7	£34.134	£34.804	£36.531	£38.333	£40.214	£42.176
8	£38.805	£39.528	£41.202	£43.059	£45.023	£46.919
Total	£398.320	£408.861	£436.057	£464.799	£494.762	£524.864

Growth From 2011:			**SFT Adjustments:**		
to 2016	**£27.196**		**Amount at 2011**	£0.409	
to 2021	**£55.938**		**Amount at 2016**	£1.534	
to 2026	**£85.901**		**Amount at 2021**	£2.813	
to 2031	**£116.003**		**Amount at 2026**	£4.259	
			Amount at 2031	£5.869	

Notes: *Product of Population and Expenditure Per Head*
2009 based estimates of consumer spending (2009 price base), Experian Retail Planner Reports 2010.
Annual growth in expenditure of 0.7% year on year. Long term trend, Figure 2, Experian Retail Planner Briefing Note 8.1
SFT/Internet share is deducted on a 2009 market share baseline with growth in that share taken for subsequent study years (2011 onwards at 0.05% per annum)

Table 3B :	Conveneince Goods Expenditure Potential - Main Food Shopping					75%
Zone	**2009**	**2011 net SFT**	**2016 net SFT**	**2021 net SFT**	**2026 net SFT**	**2031 net SFT**
1	£83.63	£86.36	£93.44	£100.88	£108.72	£116.95
2	£43.88	£44.55	£46.26	£48.03	£49.87	£51.78
3	£31.85	£33.17	£36.60	£40.22	£44.03	£48.06
4	£13.95	£14.21	£14.89	£15.60	£16.34	£17.11
5	£35.18	£35.95	£37.92	£39.98	£42.13	£44.39
6	£35.54	£36.66	£39.64	£42.84	£46.05	£48.53
7	£25.60	£26.10	£27.40	£28.75	£30.16	£31.63
8	£29.10	£29.65	£30.90	£32.29	£33.77	£35.19
Total	£298.740	£306.646	£327.043	£348.599	£371.071	£393.648

Notes: Main Food assumed at 75% of total expenditure on convenience goods

Table 3C : Conveneince Goods Expenditure Potential - Top-Up Food Shopping 25%

Zone	2009	2011 net SFT	2016 net SFT	2021 net SFT	2026 net SFT	2031 net SFT
1	£27.88	£28.79	£31.15	£33.63	£36.24	£38.98
2	£14.63	£14.85	£15.42	£16.01	£16.62	£17.26
3	£10.62	£11.06	£12.20	£13.41	£14.68	£16.02
4	£4.65	£4.74	£4.96	£5.20	£5.45	£5.70
5	£11.73	£11.98	£12.64	£13.33	£14.04	£14.80
6	£11.85	£12.22	£13.21	£14.28	£15.35	£16.18
7	£8.53	£8.70	£9.13	£9.58	£10.05	£10.54
8	£9.70	£9.88	£10.30	£10.76	£11.26	£11.73
Total	£99.580	£102.215	£109.014	£116.200	£123.690	£131.216

Notes: Top Up assumed at 25% of total expenditure on convenience goods

Table 4 : Main Food Shopping Patterns Market Share (From Household Survey)

	Z1	Z2	Z3	Z4	Z5	Z6	Z7	Z8	Total
Hemel Hempstead TC									
Asda at Hillfield Road, Hemel Hempstead town centre	15.70%	4.60%	28.50%	2.00%	2.00%	0.00%	0.80%	0.00%	8.20%
Iceland at Hillfield Road, Hemel Hempstead	0.30%	0.00%	0.00%	0.00%	0.00%	0.00%	0.80%	0.00%	0.20%
Marks & Spencer in The Marlowes Centre, Hemel Hempstead town	2.30%	0.70%	4.00%	0.00%	0.70%	0.70%	0.80%	0.00%	1.40%
Other food shops in Hemel Hempstead town centre	0.70%	0.00%	0.00%	0.00%	0.70%	0.00%	0.00%	0.00%	0.20%
Hemel Hempstead TC - Total									
Hemel Hempstead Non Town Centre - Major Stores									
Tesco at Jarman Way, Hemel Hempstead	38.30%	8.60%	30.50%	8.00%	4.70%	0.00%	0.00%	0.00%	15.10%
Sainsburys at Apsley, Hemel Hempstead	23.30%	33.10%	17.20%	1.00%	2.70%	0.00%	2.40%	0.00%	12.30%
Sainsburys at Woodall Farm, Hemel Hempstead	7.00%	1.30%	7.90%	15.00%	0.00%	0.00%	0.00%	0.00%	4.00%
Hemel Hempstead Non Town Centre - Major Stores - Total									
Hemel Hempstead Non Town Centre - Others									
Tesco Express at Henry Wells Square, Hemel Hempstead	2.30%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.80%	0.60%
Tesco Express at Stoneycroft, Warners End, Hemel Hempstead	0.30%	0.00%	0.70%	0.00%	0.70%	0.00%	0.00%	0.00%	0.20%
Co-op at Stoneycroft, Warners End, Hemel Hempstead	0.00%	0.00%	1.30%	0.00%	0.00%	0.00%	0.00%	0.00%	0.20%
Co-op at Long Caulden, Hemel Hempstead	0.30%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.10%
Costcutter at Rossgate, Hemel Hempstead	0.00%	0.70%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.10%
Spar at Leverstock Green Road, Hemel Hempstead	0.00%	0.00%	0.00%	1.00%	0.00%	0.00%	0.00%	0.00%	0.10%
Nash Mills, Hemel Hempstead									
Ross Gate									
Gadebridge									
Adeyfield									
Boxmoor									
Nisa, Crabtree Lane, Hemel Hempstead									
Grovehill									
Bennetts End									
Tesco, Grove Hill, Hemel Hempstead									
Leverstock Green									
Local stores, Hemel Hempstead									
Local stores, Warners End									
Co-op at Queens Square, Hemel Hempstead									
Other food shops in Hemel Hempstead (outside the town centre)	0.70%	1.30%	0.70%	0.00%	0.00%	0.00%	0.00%	0.00%	0.40%
Hemel Hempstead Non Town Centre - Others - Total									
Berkhamsted									
Waitrose in Berkhamsted town centre	1.70%	2.60%	4.00%	2.00%	49.30%	1.30%	11.90%	2.40%	8.90%
Tesco in Berkhamsted town centre	0.00%	0.70%	0.00%	0.00%	14.00%	0.00%	0.00%	0.00%	1.80%
Other food shops in Berkhamsted	0.00%	0.00%	0.00%	0.00%	2.70%	0.00%	0.80%	0.00%	0.40%
Berkhamsted - Total									
Tring									
Tesco, London Road, Tring	0.30%	0.00%	0.00%	0.00%	14.70%	0.70%	60.30%	4.00%	8.40%
Marks & Spencer, Dolphin Square, Tring	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.60%	0.00%	0.20%
Tring Town Centre									
Co-op, Silk Mill Way, Tring									
Other food shops in Tring	0.00%	0.00%	0.00%	0.00%	0.70%	0.00%	0.00%	0.00%	0.10%
Tring - Total									
Others in Dacorum Borough									
Apsley	0.70%	0.70%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.20%
Northchurch									
Chipperfield									
Kings Langley	0.00%	1.30%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.20%
Farm Shop, Tring	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.80%	0.00%	0.10%
Markyate									
Spar, High Street, Kings Langley									
Bovingdon									
Local Stores, Markyate									
One Stop, High Street, Northchurch									
Local stores, Potten End									
Flamstead									
Little Gaddesden									
Others in Dacorum Borough - Total									
Aylesbury									
Aylesbury	0.00%	0.70%	0.00%	0.00%	0.70%	0.00%	5.60%	46.40%	5.30%
Tesco, Tring Road, Aylesbury	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.20%	17.60%	2.10%
Tesco, Bicester Road, Aylesbury	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.40%	7.20%	1.00%
Morrisons, Station Way, Aylesbury	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.60%	3.20%	0.50%
Marks & Spencer, High Street, Aylesbury	0.30%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.60%	0.20%
Lidl, Cambridge close Retail Park, Aylesbury	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.80%	0.00%	0.10%
Sainsburys, Buckingham Street, Aylesbury	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.40%	0.20%
Total									
Chesham									
Chesham	0.00%	1.30%	0.00%	0.00%	0.70%	40.70%	2.40%	0.00%	5.30%
Sainsburys, Elgiva Lane, Chesham	0.00%	0.70%	0.00%	0.00%	0.00%	20.70%	0.00%	0.00%	2.60%
Waitrose, The Backs, Chesham	0.00%	0.70%	0.00%	0.00%	0.00%	19.30%	0.00%	0.00%	2.40%
Total									
St Albans/London Colney									
St Albans	0.70%	1.30%	0.00%	10.00%	0.00%	0.00%	0.00%	0.00%	1.10%
Waitrose, Ermine Close, Mayne Avenue, St Albans	1.00%	0.70%	0.00%	4.00%	0.00%	0.00%	0.00%	0.80%	0.70%
Sainsburys, Everard Close, St Albans	0.00%	0.00%	0.00%	6.00%	0.00%	0.00%	0.00%	0.00%	0.50%
Tesco, St Peters Street, St Albans	0.30%	0.00%	0.00%	1.00%	0.00%	0.00%	0.00%	0.00%	0.20%
Morrisons, Hatfield Road, St Albans	0.00%	0.00%	0.00%	1.00%	0.00%	0.00%	0.00%	0.00%	0.10%
Sainsburys, Barnet Road, London Colney, St Albans	0.70%	0.00%	0.00%	2.00%	0.00%	0.00%	0.00%	0.00%	0.30%
Marks & Spencer, Colney Fields Shopping park, London Colney	0.30%	0.70%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.20%
Total									
Amersham									
Amersham	0.00%	0.70%	0.00%	0.00%	0.00%	7.30%	0.00%	0.00%	1.00%
Tesco, London Road West, Amersham	0.00%	0.70%	0.00%	0.00%	0.00%	6.00%	0.00%	0.80%	0.90%
Total									
Watford									
Watford	1.00%	21.20%	0.70%	1.00%	0.00%	0.70%	0.80%	0.00%	3.10%
Asda, St Albans Road, Watford	0.00%	6.00%	0.70%	0.00%	0.00%	0.00%	0.00%	0.80%	0.90%
Costco, Hartspring Lane, Watford	0.00%	0.00%	0.00%	1.00%	0.70%	0.00%	0.00%	0.00%	0.20%
Sainsburys, Dome Roundabout, North Western Avenue, Watford	0.00%	1.30%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.20%
Total									
Dunstable									
Dunstable	0.00%	0.00%	0.00%	13.00%	1.30%	0.00%	0.00%	0.00%	1.20%
Sainsburys, Luton Road, Dunstable	0.00%	0.00%	0.00%	8.00%	0.70%	0.00%	0.00%	0.00%	0.70%
Asda, Court Road, Dunstable	0.00%	0.00%	0.00%	3.00%	0.00%	0.00%	0.00%	0.00%	0.20%
Tesco, High Street North, Dunstable	0.00%	0.00%	0.00%	2.00%	0.00%	0.00%	0.00%	0.00%	0.20%
Total									
Harpenden									
Harpenden	0.00%	0.00%	0.00%	7.00%	0.00%	0.00%	0.00%	0.00%	0.60%
Waitrose, Leyton Road, Harpenden	0.00%	0.00%	0.00%	5.00%	0.00%	0.00%	0.00%	0.00%	0.40%
Sainsburys, High Street, Harpenden	0.00%	0.00%	0.00%	1.00%	0.00%	0.00%	0.00%	0.00%	0.10%
Total									
Wendover									
Budgens, High Street, Wendover	0.00%	0.00%	0.00%	0.00%	0.00%	0.70%	0.00%	3.20%	0.40%
Tesco, Tring Road, Wendover	0.00%	0.00%	0.00%	0.00%	0.70%	0.00%	0.00%	2.40%	0.30%
Total									
Others									
Leighton Buzzard	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.80%	0.80%	0.20%
Don't know/No Answer	0.00%	0.70%	0.00%	1.00%	0.00%	0.00%	0.00%	0.00%	0.20%
Beaconsfield	0.00%	0.00%	0.00%	0.00%	0.00%	0.70%	0.00%	0.00%	0.10%
Local convenience shops	0.30%	0.70%	0.00%	0.00%	0.70%	0.00%	0.80%	0.80%	0.40%
High Wycombe	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.80%	0.10%
Luton	0.00%	0.00%	0.00%	1.00%	0.00%	0.00%	0.00%	0.00%	0.10%
Local stores, Bushey	0.00%	0.70%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.10%
Sainsburys, Albert Road South, Garston	0.00%	0.70%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.10%
Tesco, Adeyfield	0.30%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.10%
Tesco, Harefield Road, Rickmansworth	0.00%	0.70%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.10%
Tesco, Longwick Road, Princes Risborough	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.80%	0.10%
Tesco, The Luton Arndale Centre, Luton	0.00%	0.00%	0.00%	1.00%	0.00%	0.00%	0.00%	0.00%	0.10%
Budgens, High Street, Abbots Langley	0.00%	2.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.20%
Abbots Langley	0.00%	1.30%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.20%
WH Smith, High Street, Aylesbury									
Spar, Turners Place, Holmer Green									
Somerfield, Station Approach, Great Missenden									
Sainsburys, Canal Way, Ladbroke Grove, London									
Redbourn									
Morrisons, Wood Green, London									
Bobbington									
Caddington									
Chartridge									
Chauldon									
Costcutter, Greenway Parade, Chesham									
Darvell & Sons, High Street, Chesham									
Euston Station, Camden, London									
Somerfield, Southdown Road, Harpenden									
Spar, School Mead, Abbots Langley, Watford									
Stoke Mandeville									
Tesco, Katherine Place, College Road, Abbots Langley									
Marks & Spencer, Peters Street, St Albans									
Local stores, Weston Turville									
Aston Clinton									
Co-op, High Street, Redbourn									
Local stores, Wendover									
Local stores, Redbourn									
Wendover town centre									
High Wycombe									
Welwyn Garden City									
Mail Order									
Stevenage									
Hatfield									
Others Total									
Non Dacorum									
Internet	1.00%	2.00%	4.00%	3.00%	2.00%	1.30%	1.60%	3.20%	2.10%

Table 5 :	Main Food Shopping Patterns Market Share Turnovers £M(From Household Survey)								2009
Applied to 2009 Expenditure Potential	**Z1** £m	**Z2** £m	**Z3** £m	**Z4** £m	**Z5** £m	**Z6** £m	**Z7** £m	**Z8** £m	**Total** £m
Hemel Hempstead TC									
Asda at Hillfield Road, Hemel Hempstead town centre	£13.130	£2.018	£9.077	£0.279	£0.704	£0.000	£0.205	£0.000	£25.413
Iceland at Hillfield Road, Hemel Hempstead	£0.251	£0.000	£0.000	£0.000	£0.000	£0.000	£0.205	£0.000	£0.456
Marks & Spencer in The Marlowes Centre, Hemel Hempstead town	£1.924	£0.307	£1.274	£0.000	£0.246	£0.249	£0.205	£0.000	£4.205
Other food shops in Hemel Hempstead town centre	£0.585	£0.000	£0.000	£0.000	£0.246	£0.000	£0.000	£0.000	£0.832
Hemel Hempstead TC - Total	£15.890	£2.326	£10.351	£0.279	£1.196	£0.249	£0.614	£0.000	£30.905
Hemel Hempstead Non Town Centre - Major Stores									
Tesco at Jarman Way, Hemel Hempstead	£32.031	£3.774	£9.714	£1.116	£1.654	£0.000	£0.000	£0.000	£48.288
Sainsburys at Apsley, Hemel Hempstead	£19.486	£14.524	£5.478	£0.139	£0.950	£0.000	£0.614	£0.000	£41.192
Sainsburys at Woodall Farm, Hemel Hempstead	£5.854	£0.570	£2.516	£2.092	£0.000	£0.000	£0.000	£0.000	£11.033
Hemel Hempstead Non Town Centre - Major Stores - Total	£57.371	£18.868	£17.708	£3.348	£2.603	£0.000	£0.614	£0.000	£100.513
Hemel Hempstead Non Town Centre - Others									
Tesco Express at Henry Wells Square, Hemel Hempstead	£1.924	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.233	£2.156
Tesco Express at Stoneycroft, Warners End, Hemel Hempstead	£0.251	£0.000	£0.223	£0.000	£0.246	£0.000	£0.000	£0.000	£0.720
Co-op at Stoneycroft, Warners End, Hemel Hempstead	£0.000	£0.000	£0.414	£0.000	£0.000	£0.000	£0.000	£0.000	£0.414
Co-op at Long Caulden, Hemel Hempstead	£0.251	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.251
Costcutter at Rossgate, Hemel Hempstead	£0.000	£0.307	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.307
Spar at Leverstock Green Road, Hemel Hempstead	£0.000	£0.000	£0.000	£0.139	£0.000	£0.000	£0.000	£0.000	£0.139
Nash Mills, Hemel Hempstead	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Ross Gate	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Gadebridge	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Adeyfield	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Boxmoor	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Nisa, Crabtree Lane, Hemel Hempstead	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Grovehill	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Bennetts End	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Tesco, Grove Hill, Hemel Hempstead	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Leverstock Green	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Local stores, Hemel Hempstead	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Local stores, Warners End	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Co-op at Queens Square, Hemel Hempstead	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Other food shops in Hemel Hempstead (outside the town centre)	£0.585	£0.570	£0.223	£0.000	£0.000	£0.000	£0.000	£0.000	£1.379
Hemel Hempstead Non Town Centre - Others - Total	£3.011	£0.878	£0.860	£0.139	£0.246	£0.000	£0.000	£0.233	£5.367
Berkhamsted									
Waitrose in Berkhamsted town centre	£1.422	£1.141	£1.274	£0.279	£17.345	£0.462	£3.046	£0.698	£25.667
Tesco in Berkhamsted town centre	£0.000	£0.307	£0.000	£0.000	£4.926	£0.000	£0.000	£0.000	£5.233
Other food shops in Berkhamsted	£0.000	£0.000	£0.000	£0.000	£0.950	£0.000	£0.205	£0.000	£1.155
Berkhamsted - Total	£1.422	£1.448	£1.274	£0.279	£23.220	£0.462	£3.251	£0.698	£32.055
Tring									
Tesco, London Road, Tring	£0.251	£0.000	£0.000	£0.000	£5.172	£0.249	£15.437	£1.164	£22.273
Marks & Spencer, Dolphin Square, Tring	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.410	£0.000	£0.410
Tring Town Centre	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Co-op, Silk Mill Way, Tring	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Other food shops in Tring	£0.000	£0.000	£0.000	£0.000	£0.246	£0.000	£0.000	£0.000	£0.246
Tring - Total	£0.251	£0.000	£0.000	£0.000	£5.418	£0.249	£15.847	£1.164	£22.929
Others in Dacorum Borough									
Apsley	£0.585	£0.307	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.893
Northchurch	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Chipperfield	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Kings Langley	£0.000	£0.570	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.570
Farm Shop, Tring	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.205	£0.000	£0.205
Markyate	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Spar, High Street, Kings Langley	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Bovingdon	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Local Stores, Markyate	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
One Stop, High Street, Northchurch	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Local stores, Potten End	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Flamstead	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Little Gaddesden	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Others in Dacorum Borough - Total	£0.585	£0.878	£0.000	£0.000	£0.000	£0.000	£0.205	£0.000	£1.668
Aylesbury									
Aylesbury	£0.000	£0.307	£0.000	£0.000	£0.246	£0.000	£1.434	£13.504	£15.491
Tesco, Tring Road, Aylesbury	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.819	£5.122	£5.942
Tesco, Bicester Road, Aylesbury	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.614	£2.095	£2.710
Morrisons, Station Way, Aylesbury	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.410	£0.931	£1.341
Marks & Spencer, High Street, Aylesbury	£0.251	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.466	£0.717
Lidl, Cambridge close Retail Park, Aylesbury	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.205	£0.000	£0.205
Sainsburys, Buckingham Street, Aylesbury	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.698	£0.698
Total	£0.251	£0.307	£0.000	£0.000	£0.246	£0.000	£3.482	£22.818	£27.104
Chesham									
Chesham	£0.000	£0.570	£0.000	£0.000	£0.246	£14.466	£0.614	£0.000	£15.898
Sainsburys, Elgiva Lane, Chesham	£0.000	£0.307	£0.000	£0.000	£0.000	£7.358	£0.000	£0.000	£7.665
Waitrose, The Backs, Chesham	£0.000	£0.307	£0.000	£0.000	£0.000	£6.860	£0.000	£0.000	£7.167
Total	£0.000	£1.185	£0.000	£0.000	£0.246	£28.684	£0.614	£0.000	£30.730
St Albans/London Colney									
St Albans	£0.585	£0.570	£0.000	£1.395	£0.000	£0.000	£0.000	£0.000	£2.551
Waitrose, Ermine Close, Mayne Avenue, St Albans	£0.836	£0.307	£0.000	£0.558	£0.000	£0.000	£0.000	£0.233	£1.934
Sainsburys, Everard Close, St Albans	£0.000	£0.000	£0.000	£0.837	£0.000	£0.000	£0.000	£0.000	£0.837
Tesco, St Peters Street, St Albans	£0.251	£0.000	£0.000	£0.139	£0.000	£0.000	£0.000	£0.000	£0.390
Morrisons, Hatfield Road, St Albans	£0.000	£0.000	£0.000	£0.139	£0.000	£0.000	£0.000	£0.000	£0.139
Sainsburys, Barnet Road, London Colney, St Albans	£0.585	£0.000	£0.000	£0.279	£0.000	£0.000	£0.000	£0.000	£0.864
Marks & Spencer, Colney Fields Shopping park, London Colney	£0.251	£0.307	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.558
Total	£2.509	£1.185	£0.000	£3.348	£0.000	£0.000	£0.000	£0.233	£7.274
Amersham									
Amersham	£0.000	£0.307	£0.000	£0.000	£0.000	£2.595	£0.000	£0.000	£2.902
Tesco, London Road West, Amersham	£0.000	£0.307	£0.000	£0.000	£0.000	£2.133	£0.000	£0.233	£2.673
Total	£0.000	£0.614	£0.000	£0.000	£0.000	£4.727	£0.000	£0.233	£5.575
Watford									
Watford	£0.836	£9.302	£0.223	£0.139	£0.000	£0.249	£0.205	£0.000	£10.955
Asda, St Albans Road, Watford	£0.000	£2.633	£0.223	£0.000	£0.000	£0.000	£0.000	£0.233	£3.089
Costco, Hartspring Lane, Watford	£0.000	£0.000	£0.000	£0.139	£0.246	£0.000	£0.000	£0.000	£0.386
Sainsburys, Dome Roundabout, North Western Avenue, Watford	£0.000	£0.570	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.570
Total	£0.836	£12.506	£0.446	£0.279	£0.246	£0.249	£0.205	£0.233	£14.999
Dunstable									
Dunstable	£0.000	£0.000	£0.000	£1.813	£0.457	£0.000	£0.000	£0.000	£2.271
Sainsburys, Luton Road, Dunstable	£0.000	£0.000	£0.000	£1.116	£0.246	£0.000	£0.000	£0.000	£1.362
Asda, Court Road, Dunstable	£0.000	£0.000	£0.000	£0.418	£0.000	£0.000	£0.000	£0.000	£0.418
Tesco, High Street North, Dunstable	£0.000	£0.000	£0.000	£0.279	£0.000	£0.000	£0.000	£0.000	£0.279
Total	£0.000	£0.000	£0.000	£3.627	£0.704	£0.000	£0.000	£0.000	£4.331
Harpenden									
Harpenden	£0.000	£0.000	£0.000	£0.976	£0.000	£0.000	£0.000	£0.000	£0.976
Waitrose, Leyton Road, Harpenden	£0.000	£0.000	£0.000	£0.697	£0.000	£0.000	£0.000	£0.000	£0.697
Sainsburys, High Street, Harpenden	£0.000	£0.000	£0.000	£0.139	£0.000	£0.000	£0.000	£0.000	£0.139
Total	£0.000	£0.000	£0.000	£1.813	£0.000	£0.000	£0.000	£0.000	£1.813
Wendover									
Budgens, High Street, Wendover	£0.000	£0.000	£0.000	£0.000	£0.000	£0.249	£0.000	£0.931	£1.180
Tesco, Tring Road, Wendover	£0.000	£0.000	£0.000	£0.000	£0.246	£0.000	£0.000	£0.698	£0.945
Total	£0.000	£0.000	£0.000	£0.000	£0.246	£0.249	£0.000	£1.630	£2.125
Others									
Leighton Buzzard	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.205	£0.233	£0.438
Don't know/No Answer	£0.000	£0.307	£0.000	£0.139	£0.000	£0.000	£0.000	£0.000	£0.447
Beaconsfield	£0.000	£0.000	£0.000	£0.000	£0.000	£0.249	£0.000	£0.000	£0.249
Local convenience shops	£0.251	£0.307	£0.000	£0.000	£0.246	£0.000	£0.205	£0.233	£1.242
High Wycombe	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.233	£0.233
Luton	£0.000	£0.000	£0.000	£0.139	£0.000	£0.000	£0.000	£0.000	£0.139
Local stores, Bushey	£0.000	£0.307	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.307
Sainsburys, Albert Road South, Garston	£0.000	£0.307	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.307
Tesco, Adeyfield	£0.251	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.251
Tesco, Harefield Road, Rickmansworth	£0.000	£0.307	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.307
Tesco, Longwick Road, Princes Risborough	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.233	£0.233
Tesco, The Luton Arndale Centre, Luton	£0.000	£0.000	£0.000	£0.139	£0.000	£0.000	£0.000	£0.000	£0.139
Budgens, High Street, Abbots Langley	£0.000	£0.878	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.878
Abbots Langley	£0.000	£0.570	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.570
WH Smith, High Street, Aylesbury	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Spar, Turners Place, Holmer Green	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Somerfield, Station Approach, Great Missenden	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Sainsburys, Canal Way, Ladbroke Grove, London	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Redbourn	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Morrisons, Wood Green, London	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Bobbington	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Caddington	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Chartridge	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Chauldon	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Costcutter, Greenway Parade, Chesham	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Darvell & Sons, High Street, Chesham	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Euston Station, Camden, London	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Somerfield, Southdown Road, Harpenden	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Spar, School Mead, Abbots Langley, Watford	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Stoke Mandeville	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Tesco, Katherine Place, College Road, Abbots Langley	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Marks & Spencer, Peters Street, St Albans	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Local stores, Weston Turville	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Aston Clinton	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Co-op, High Street, Redbourn	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Local stores, Wendover	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Local stores, Redbourn	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Wendover town centre	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
High Wycombe	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Welwyn Garden City	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Mail Order	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Stevenage	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Hatfield	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Others Total	£0.502	£2.984	£0.000	£0.418	£0.246	£0.249	£0.410	£0.931	£5.740
Non Dacorum	£4.098	£18.780	£0.446	£9.486	£1.935	£34.158	£4.710	£26.077	£99.691
Internet	£0.836	£0.878	£1.274	£0.418	£0.704	£0.462	£0.410	£0.931	£5.913

Notes: Main Food assumed at 75% of total expenditure on convenience goods
Product of Table 4 and Table 3B

Table 6 : Top-Up Food Shopping Patterns Market Share (From Household Survey)

	Z1	Z2	Z3	Z4	Z5	Z6	Z7	Z8	Total
Hemel Hempstead Town Centre									
Asda at Hillfield Road, Hemel Hempstead town centre	7.54%	0.78%	4.41%	1.23%	0.00%	0.00%	0.00%	0.00%	2.57%
Iceland at Hillfield Road, Hemel Hempstead	0.40%	0.00%	0.00%	0.00%	0.00%	0.90%	0.00%	0.00%	0.19%
Marks & Spencer in The Marlowes Centre, Hemel Hempstead town	4.76%	1.56%	4.41%	0.00%	0.76%	0.00%	0.00%	0.99%	2.09%
Other food shops in Hemel Hempstead town centre	6.75%	2.34%	4.41%	1.23%	0.76%	0.90%	0.00%	0.00%	2.76%
Hemel Hempstead TC - Total									
Hemel Hempstead Non Town Centre - Major Stores									
Tesco at Jarman Way, Hemel Hempstead	14.29%	1.56%	2.94%	3.70%	0.76%	0.00%	0.00%	0.00%	4.37%
Sainsburys at Apsley, Hemel Hempstead	4.37%	10.16%	1.47%	0.00%	0.76%	0.00%	0.00%	0.00%	2.57%
Sainsburys at Woodall Farm, Hemel Hempstead	9.92%	1.56%	7.35%	4.94%	0.00%	0.00%	0.00%	0.00%	3.90%
Hemel Hempstead Non Town Centre - Major Stores - Total									
Hemel Hempstead Non Town Centre - Others									
Tesco Express at Henry Wells Square, Hemel Hempstead	2.78%	0.00%	7.35%	0.00%	0.00%	0.00%	0.00%	0.00%	1.62%
Tesco Express at Stoneycroft, Warners End, Hemel Hempstead	3.57%	0.78%	12.50%	0.00%	0.00%	0.00%	0.00%	0.00%	2.57%
Co-op at Stoneycroft, Warners End, Hemel Hempstead	0.00%	0.00%	3.68%	0.00%	0.00%	0.00%	0.00%	0.00%	0.48%
Co-op at Long Caulden, Hemel Hempstead	0.40%	0.00%	3.68%	0.00%	0.00%	0.00%	0.00%	0.00%	0.57%
Costcutter at Rossgate, Hemel Hempstead	0.40%	0.00%	2.94%	0.00%	0.00%	0.00%	0.00%	0.00%	0.48%
Spar at Leverstock Green Road, Hemel Hempstead	1.59%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.98%	0.57%
Nash Mills, Hemel Hempstead	0.40%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.10%
Ross Gate	0.00%	0.00%	0.74%	0.00%	0.00%	0.00%	0.00%	0.00%	0.10%
Gadebridge	0.00%	0.00%	2.21%	0.00%	0.00%	0.00%	0.00%	0.00%	0.29%
Adeyfield	0.40%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.10%
Boxmoor	0.79%	0.00%	1.47%	0.00%	0.00%	0.00%	0.00%	0.00%	0.38%
Nisa, Crabtree Lane, Hemel Hempstead	0.79%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.19%
Grovehill	0.00%	0.00%	1.47%	0.00%	0.00%	0.00%	0.00%	0.00%	0.19%
Bennetts End	0.79%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.19%
Tesco, Grove Hill, Hemel Hempstead	0.00%	0.00%	2.94%	0.00%	0.00%	0.00%	0.00%	0.00%	0.38%
Leverstock Green	3.17%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.76%
Local stores, Hemel Hempstead	2.38%	0.78%	3.68%	0.00%	0.00%	0.00%	0.00%	0.00%	1.14%
Local stores, Warners End	0.40%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.10%
Co-op at Queens Square, Hemel Hempstead	3.57%	0.00%	0.74%	0.00%	0.00%	0.00%	0.00%	0.00%	0.95%
Other food shops in Hemel Hempstead (outside the town centre	3.57%	3.13%	5.88%	0.00%	0.00%	0.90%	0.00%	0.00%	2.09%
Hemel Hempstead Non Town Centre - Others - Total									
Berkhamsted									
Waitrose in Berkhamsted town centre	0.40%	1.56%	1.47%	1.23%	33.59%	0.90%	0.89%	0.00%	4.94%
Tesco in Berkhamsted town centre	0.40%	0.00%	0.00%	0.00%	12.98%	0.00%	0.00%	0.00%	1.71%
Other food shops in Berkhamsted	0.00%	0.00%	0.00%	0.00%	16.03%	0.00%	0.00%	0.00%	2.00%
Berkhamsted - Total									
Tring									
Tesco, London Road, Tring	0.00%	0.78%	0.00%	0.00%	3.82%	0.00%	53.57%	6.93%	6.94%
Marks & Spencer, Dolphin Square, Tring	0.40%	0.78%	0.00%	0.00%	0.00%	0.00%	5.36%	1.98%	0.95%
Tring Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.68%	0.00%	0.29%
Co-op, Silk Mill Way, Tring	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.57%	0.00%	0.38%
Other food shops in Tring	0.00%	0.00%	0.00%	0.00%	0.76%	0.00%	11.61%	0.99%	1.43%
Tring - Total									
Others in Dacorum Borough									
Apsley									
Northchurch	0.40%	0.00%	0.00%	0.00%	2.29%	0.00%	0.00%	0.00%	0.38%
Chipperfield	0.00%	2.34%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.29%
Kings Langley	0.00%	4.69%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.57%
Farm Shop, Tring									
Markyate	0.00%	0.00%	0.00%	4.94%	0.00%	0.00%	0.00%	0.00%	0.38%
Spar, High Street, Kings Langley	0.00%	0.78%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.10%
Bovingdon	0.00%	5.47%	0.00%	0.00%	0.00%	0.90%	0.00%	0.00%	0.76%
Local Stores, Markyate	0.00%	0.00%	0.00%	1.23%	0.00%	0.00%	0.00%	0.00%	0.10%
One Stop, High Street, Northchurch	0.00%	0.00%	0.00%	0.00%	0.76%	0.00%	0.00%	0.00%	0.10%
Local stores, Potten End	0.00%	0.00%	0.00%	0.00%	3.05%	0.00%	0.00%	0.00%	0.38%
Flamstead	0.00%	0.00%	0.00%	3.70%	0.00%	0.00%	0.00%	0.00%	0.29%
Little Gaddesden	0.00%	0.00%	0.00%	0.00%	2.29%	0.00%	0.00%	0.00%	0.29%
Others in Dacorum Borough - Total									
Aylesbury									
Aylesbury	0.00%	0.78%	0.00%	0.00%	0.00%	0.00%	3.57%	25.74%	2.95%
Tesco, Tring Road, Aylesbury	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.89%	4.95%	0.57%
Tesco, Bicester Road, Aylesbury									
Morrisons, Station Way, Aylesbury									
Marks & Spencer, High Street, Aylesbury	0.40%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.99%	0.19%
Lidl, Cambridge close Retail Park, Aylesbury									
Sainsburys, Buckingham Street, Aylesbury	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.99%	0.10%
Total									
Chesham									
Chesham	0.00%	0.78%	0.00%	0.00%	0.76%	50.45%	0.89%	0.00%	5.61%
Sainsburys, Elgiva Lane, Chesham	0.40%	0.00%	0.00%	0.00%	0.00%	12.61%	0.00%	0.00%	1.43%
Waitrose, The Backs, Chesham	0.00%	0.00%	0.00%	0.00%	0.00%	8.11%	0.00%	0.00%	0.86%
Total									
St Albans/London Colney									
St Albans	2.38%	0.00%	0.00%	19.75%	0.76%	0.00%	0.00%	0.00%	2.19%
Waitrose, Ermine Close, Mayne Avenue, St Albans	0.40%	0.00%	0.00%	2.47%	0.00%	0.00%	0.00%	0.00%	0.29%
Sainsburys, Everard Close, St Albans	0.00%	0.00%	0.00%	1.23%	0.00%	0.90%	0.00%	0.00%	0.19%
Tesco, St Peters Street, St Albans									
Morrisons, Hatfield Road, St Albans									
Sainsburys, Barnet Road, London Colney, St Albans									
Marks & Spencer, Colney Fields Shopping park, London Colney									
Total									
Amersham									
Amersham	0.40%	1.56%	0.00%	0.00%	0.00%	1.80%	0.00%	0.00%	0.48%
Tesco, London Road West, Amersham	0.00%	0.00%	0.00%	0.00%	0.00%	0.90%	0.00%	0.00%	0.10%
Total									
Watford									
Watford	1.98%	10.16%	0.74%	0.00%	0.76%	0.00%	0.89%	0.00%	2.00%
Asda, St Albans Road, Watford									
Costco, Hartspring Lane, Watford									
Sainsburys, Dome Roundabout, North Western Avenue, Watford	0.00%	1.56%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.19%
Total									
Dunstable									
Dunstable	0.00%	0.00%	0.00%	4.94%	0.76%	0.00%	0.00%	0.00%	0.48%
Sainsburys, Luton Road, Dunstable	0.00%	0.00%	0.00%	2.47%	0.00%	0.00%	0.00%	0.00%	0.19%
Asda, Court Road, Dunstable									
Tesco, High Street North, Dunstable									
Total									
Harpenden									
Harpenden	0.40%	0.00%	0.00%	6.17%	0.00%	0.00%	0.00%	0.00%	0.57%
Waitrose, Leyton Road, Harpenden	0.00%	0.00%	0.00%	1.23%	0.00%	0.00%	0.00%	0.00%	0.10%
Sainsburys, High Street, Harpenden	0.00%	0.00%	0.00%	1.23%	0.00%	0.00%	0.00%	0.00%	0.10%
Total									
Wendover									
Budgens, High Street, Wendover	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	8.91%	0.86%
Tesco, Tring Road, Wendover	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.99%	0.10%
Total									
Others									
Leighton Buzzard	0.00%	0.78%	0.00%	1.23%	0.00%	0.00%	0.00%	0.00%	0.19%
Don't know/No Answer	0.00%	0.78%	0.00%	2.47%	0.76%	0.00%	0.00%	0.00%	0.38%
Beaconsfield	0.00%	0.00%	0.00%	0.00%	0.76%	0.00%	0.00%	0.00%	0.10%
Local convenience shops	17.06%	19.53%	22.06%	17.28%	13.74%	17.12%	15.18%	17.82%	17.49%
High Wycombe									
Luton									
Local stores, Bushey									
Sainsburys, Albert Road South, Garston									
Tesco, Adeyfield									
Tesco, Harefield Road, Rickmansworth									
Tesco, Longwick Road, Princes Risborough									
Tesco, The Luton Arndale Centre, Luton									
Budgens, High Street, Abbots Langley	0.00%	1.56%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.19%
Abbots Langley	0.40%	19.53%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.47%
WH Smith, High Street, Aylesbury	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.99%	0.10%
Spar, Turners Place, Holmer Green	0.00%	0.00%	0.00%	0.00%	0.00%	0.90%	0.00%	0.00%	0.10%
Somerfield, Station Approach, Great Missenden	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.99%	0.10%
Sainsburys, Canal Way, Ladbroke Grove, London	0.00%	0.00%	0.00%	1.23%	0.00%	0.00%	0.00%	0.00%	0.10%
Redbourn	0.00%	0.00%	0.00%	1.23%	0.00%	0.00%	0.00%	0.00%	0.10%
Morrisons, Wood Green, London	0.00%	0.00%	0.00%	0.00%	0.76%	0.00%	0.00%	0.00%	0.10%
Bobbington	0.00%	0.78%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.10%
Caddington	0.00%	0.00%	0.00%	0.00%	0.76%	0.00%	0.00%	0.00%	0.10%
Chartridge	0.00%	0.00%	0.00%	0.00%	0.00%	0.90%	0.00%	0.00%	0.10%
Chauldon	0.00%	0.00%	0.74%	0.00%	0.00%	0.00%	0.00%	0.00%	0.10%
Costcutter, Greenway Parade, Chesham	0.00%	0.00%	0.00%	0.00%	0.00%	0.90%	0.00%	0.00%	0.10%
Darvell & Sons, High Street, Chesham	0.00%	0.00%	0.00%	0.00%	0.00%	0.90%	0.00%	0.00%	0.10%
Euston Station, Camden, London	0.00%	0.00%	0.00%	0.00%	0.76%	0.00%	0.00%	0.00%	0.10%
Somerfield, Southdown Road, Harpenden	0.40%	0.00%	0.74%	0.00%	0.00%	0.00%	0.00%	0.00%	0.19%
Spar, School Mead, Abbots Langley, Watford	0.00%	1.56%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.19%
Stoke Mandeville	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.98%	0.19%
Tesco, Katherine Place, College Road, Abbots Langley	0.00%	1.56%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.19%
Marks & Spencer, Peters Street, St Albans	0.40%	0.00%	0.00%	1.23%	0.00%	0.00%	0.00%	0.00%	0.19%
Local stores, Weston Turville	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.98%	0.19%
Aston Clinton	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.98%	0.19%
Co-op, High Street, Redbourn	0.00%	0.00%	0.00%	3.70%	0.00%	0.00%	0.00%	0.00%	0.29%
Local stores, Wendover	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.96%	0.38%
Local stores, Redbourn	0.00%	0.00%	0.00%	7.41%	0.00%	0.00%	0.00%	0.00%	0.57%
Wendover town centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	12.87%	1.24%
High Wycombe	0.00%	0.00%	0.00%	1.23%	0.00%	0.00%	0.00%	0.00%	0.10%
Welwyn Garden City	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.99%	0.10%
Mail Order	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.99%	0.10%
Stevenage	0.40%	0.00%	0.00%	0.00%	0.00%	0.00%	0.89%	0.00%	0.19%
Hatfield	0.40%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.10%
Others Total									
Non Dacorum									
Internet	0.00%	0.00%	0.00%	1.23%	0.76%	0.00%	0.00%	0.00%	0.19%

Table 7 : Top-Up Food Shopping Market Share Turnovers £M (From Household Survey) 2009

Applied to 2009 Expenditure Potential	Z1	Z2	Z3	Z4	Z5	Z6	Z7	Z8	Total
Hemel Hempstead TC									
Asda at Hillfield Road, Hemel Hempstead town centre	£2.102	£0.114	£0.468	£0.057	£0.000	£0.000	£0.000	£0.000	£2.742
Iceland at Hillfield Road, Hemel Hempstead	£0.111	£0.000	£0.000	£0.000	£0.000	£0.107	£0.000	£0.000	£0.217
Marks & Spencer in The Marlowes Centre, Hemel Hempstead town	£1.327	£0.229	£0.468	£0.000	£0.090	£0.000	£0.000	£0.096	£2.210
Other food shops in Hemel Hempstead town centre	£1.881	£0.343	£0.468	£0.057	£0.090	£0.107	£0.000	£0.000	£2.945
Hemel Hempstead TC - Total	£5.421	£0.686	£1.405	£0.115	£0.179	£0.213	£0.000	£0.096	£8.115
Hemel Hempstead Non Town Centre - Major Stores									
Tesco at Jarman Way, Hemel Hempstead	£3.982	£0.229	£0.312	£0.172	£0.090	£0.000	£0.000	£0.000	£4.785
Sainsburys at Apsley, Hemel Hempstead	£1.217	£1.485	£0.156	£0.000	£0.090	£0.000	£0.000	£0.000	£2.948
Sainsburys at Woodall Farm, Hemel Hempstead	£2.766	£0.229	£0.781	£0.230	£0.000	£0.000	£0.000	£0.000	£4.004
Hemel Hempstead Non Town Centre - Major Stores - Total	£7.965	£1.943	£1.249	£0.402	£0.179	£0.000	£0.000	£0.000	£11.737
Hemel Hempstead Non Town Centre - Others									
Tesco Express at Henry Wells Square, Hemel Hempstead	£0.774	£0.000	£0.781	£0.000	£0.000	£0.000	£0.000	£0.000	£1.555
Tesco Express at Stoneycroft, Warners End, Hemel Hempstead	£0.996	£0.114	£1.327	£0.000	£0.000	£0.000	£0.000	£0.000	£2.437
Co-op at Stoneycroft, Warners End, Hemel Hempstead	£0.000	£0.000	£0.390	£0.000	£0.000	£0.000	£0.000	£0.000	£0.390
Co-op at Long Caulden, Hemel Hempstead	£0.111	£0.000	£0.390	£0.000	£0.000	£0.000	£0.000	£0.000	£0.501
Costcutter at Rossgate, Hemel Hempstead	£0.111	£0.000	£0.312	£0.000	£0.000	£0.000	£0.000	£0.000	£0.423
Spar at Leverstock Green Road, Hemel Hempstead	£0.442	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.192	£0.635
Nash Mills, Hemel Hempstead	£0.111	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.111
Ross Gate	£0.000	£0.000	£0.078	£0.000	£0.000	£0.000	£0.000	£0.000	£0.078
Gadebridge	£0.000	£0.000	£0.234	£0.000	£0.000	£0.000	£0.000	£0.000	£0.234
Adeyfield	£0.111	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.111
Boxmoor	£0.221	£0.000	£0.156	£0.000	£0.000	£0.000	£0.000	£0.000	£0.377
Nisa, Crabtree Lane, Hemel Hempstead	£0.221	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.221
Grovehill	£0.000	£0.000	£0.156	£0.000	£0.000	£0.000	£0.000	£0.000	£0.156
Bennetts End	£0.221	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.221
Tesco, Grove Hill, Hemel Hempstead	£0.000	£0.000	£0.312	£0.000	£0.000	£0.000	£0.000	£0.000	£0.312
Leverstock Green	£0.885	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.885
Local stores, Hemel Hempstead	£0.664	£0.114	£0.390	£0.000	£0.000	£0.000	£0.000	£0.000	£1.168
Local stores, Warners End	£0.111	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.111
Co-op at Queens Square, Hemel Hempstead	£0.996	£0.000	£0.078	£0.000	£0.000	£0.000	£0.000	£0.000	£1.074
Other food shops in Hemel Hempstead (outside the town centre)	£0.996	£0.457	£0.624	£0.000	£0.000	£0.107	£0.000	£0.000	£2.184
Hemel Hempstead Non Town Centre - Others - Total	£6.969	£0.686	£5.230	£0.000	£0.000	£0.107	£0.000	£0.192	£13.184
Berkhamsted									
Waitrose in Berkhamsted town centre	£0.111	£0.229	£0.156	£0.057	£3.939	£0.107	£0.076	£0.000	£4.675
Tesco in Berkhamsted town centre	£0.111	£0.000	£0.000	£0.000	£1.522	£0.000	£0.000	£0.000	£1.633
Other food shops in Berkhamsted	£0.000	£0.000	£0.000	£0.000	£1.880	£0.000	£0.000	£0.000	£1.880
Berkhamsted - Total	£0.221	£0.229	£0.156	£0.057	£7.341	£0.107	£0.076	£0.000	£8.187
Tring									
Tesco, London Road, Tring	£0.000	£0.114	£0.000	£0.000	£0.448	£0.000	£4.571	£0.672	£5.806
Marks & Spencer, Dolphin Square, Tring	£0.111	£0.114	£0.000	£0.000	£0.000	£0.000	£0.457	£0.192	£0.874
Tring Town Centre	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.229	£0.000	£0.229
Co-op, Silk Mill Way, Tring	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.305	£0.000	£0.305
Other food shops in Tring	£0.000	£0.000	£0.000	£0.000	£0.090	£0.000	£0.990	£0.096	£1.176
Tring - Total	£0.111	£0.229	£0.000	£0.000	£0.537	£0.000	£6.552	£0.961	£8.389
Others in Dacorum Borough									
Apsley	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Northchurch	£0.111	£0.000	£0.000	£0.000	£0.269	£0.000	£0.000	£0.000	£0.379
Chipperfield	£0.000	£0.343	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.343
Kings Langley	£0.000	£0.686	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.686
Farm Shop, Tring	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Markyate	£0.000	£0.000	£0.000	£0.230	£0.000	£0.000	£0.000	£0.000	£0.230
Spar, High Street, Kings Langley	£0.000	£0.114	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.114
Bovingdon	£0.000	£0.800	£0.000	£0.000	£0.000	£0.107	£0.000	£0.000	£0.907
Local Stores, Markyate	£0.000	£0.000	£0.000	£0.057	£0.000	£0.000	£0.000	£0.000	£0.057
One Stop, High Street, Northchurch	£0.000	£0.000	£0.000	£0.000	£0.090	£0.000	£0.000	£0.000	£0.090
Local stores, Potten End	£0.000	£0.000	£0.000	£0.000	£0.358	£0.000	£0.000	£0.000	£0.358
Flamstead	£0.000	£0.000	£0.000	£0.172	£0.000	£0.000	£0.000	£0.000	£0.172
Little Gaddesden	£0.000	£0.000	£0.000	£0.000	£0.269	£0.000	£0.000	£0.000	£0.269
Others in Dacorum Borough - Total	£0.111	£1.943	£0.000	£0.459	£0.985	£0.107	£0.000	£0.000	£3.604
Aylesbury									
Aylesbury	£0.000	£0.114	£0.000	£0.000	£0.000	£0.000	£0.305	£2.497	£2.916
Tesco, Tring Road, Aylesbury	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.076	£0.480	£0.556
Tesco, Bicester Road, Aylesbury	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Morrisons, Station Way, Aylesbury	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Marks & Spencer, High Street, Aylesbury	£0.111	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.096	£0.207
Lidl, Cambridge close Retail Park, Aylesbury	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Sainsburys, Buckingham Street, Aylesbury	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.096	£0.096
Total	£0.111	£0.114	£0.000	£0.000	£0.000	£0.000	£0.381	£3.170	£3.776
Chesham									
Chesham	£0.000	£0.114	£0.000	£0.000	£0.090	£5.977	£0.076	£0.000	£6.257
Sainsburys, Elgiva Lane, Chesham	£0.111	£0.000	£0.000	£0.000	£0.000	£1.494	£0.000	£0.000	£1.605
Waitrose, The Backs, Chesham	£0.000	£0.000	£0.000	£0.000	£0.000	£0.961	£0.000	£0.000	£0.961
Total	£0.111	£0.114	£0.000	£0.000	£0.090	£8.432	£0.076	£0.000	£8.823
St Albans/London Colney									
St Albans	£0.664	£0.000	£0.000	£0.918	£0.090	£0.000	£0.000	£0.000	£1.672
Waitrose, Ermine Close, Mayne Avenue, St Albans	£0.111	£0.000	£0.000	£0.115	£0.000	£0.000	£0.000	£0.000	£0.225
Sainsburys, Everard Close, St Albans	£0.000	£0.000	£0.000	£0.057	£0.000	£0.107	£0.000	£0.000	£0.164
Tesco, St Peters Street, St Albans	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Morrisons, Hatfield Road, St Albans	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Sainsburys, Barnet Road, London Colney, St Albans	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Marks & Spencer, Colney Fields Shopping park, London Colney	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Total	£0.774	£0.000	£0.000	£1.091	£0.090	£0.107	£0.000	£0.000	£2.061
Amersham									
Amersham	£0.111	£0.229	£0.000	£0.000	£0.000	£0.213	£0.000	£0.000	£0.553
Tesco, London Road West, Amersham	£0.000	£0.000	£0.000	£0.000	£0.000	£0.107	£0.000	£0.000	£0.107
Total	£0.111	£0.229	£0.000	£0.000	£0.000	£0.320	£0.000	£0.000	£0.659
Watford									
Watford	£0.553	£1.485	£0.078	£0.000	£0.090	£0.000	£0.076	£0.000	£2.282
Asda, St Albans Road, Watford	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Costco, Hartspring Lane, Watford	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Sainsburys, Dome Roundabout, North Western Avenue, Watford	£0.000	£0.229	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.229
Total	£0.553	£1.714	£0.078	£0.000	£0.090	£0.000	£0.076	£0.000	£2.511
Dunstable									
Dunstable	£0.000	£0.000	£0.000	£0.230	£0.090	£0.000	£0.000	£0.000	£0.319
Sainsburys, Luton Road, Dunstable	£0.000	£0.000	£0.000	£0.115	£0.000	£0.000	£0.000	£0.000	£0.115
Asda, Court Road, Dunstable	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Tesco, High Street North, Dunstable	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Total	£0.000	£0.000	£0.000	£0.344	£0.090	£0.000	£0.000	£0.000	£0.434
Harpenden									
Harpenden	£0.111	£0.000	£0.000	£0.287	£0.000	£0.000	£0.000	£0.000	£0.398
Waitrose, Leyton Road, Harpenden	£0.000	£0.000	£0.000	£0.057	£0.000	£0.000	£0.000	£0.000	£0.057
Sainsburys, High Street, Harpenden	£0.000	£0.000	£0.000	£0.057	£0.000	£0.000	£0.000	£0.000	£0.057
Total	£0.111	£0.000	£0.000	£0.402	£0.000	£0.000	£0.000	£0.000	£0.512
Wendover									
Budgens, High Street, Wendover	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.864	£0.864
Tesco, Tring Road, Wendover	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.096	£0.096
Total	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.961	£0.961
Others									
Leighton Buzzard	£0.000	£0.114	£0.000	£0.057	£0.000	£0.000	£0.000	£0.000	£0.172
Don't know/No Answer	£0.000	£0.114	£0.000	£0.115	£0.090	£0.000	£0.000	£0.000	£0.319
Beaconsfield	£0.000	£0.000	£0.000	£0.000	£0.090	£0.000	£0.000	£0.000	£0.090
Local convenience shops	£4.757	£2.857	£2.342	£0.804	£1.611	£2.028	£1.295	£1.729	£17.423
High Wycombe	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Luton	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Local stores, Bushey	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Sainsburys, Albert Road South, Garston	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Tesco, Adeyfield	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Tesco, Harefield Road, Rickmansworth	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Tesco, Longwick Road, Princes Risborough	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Tesco, The Luton Arndale Centre, Luton	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Budgens, High Street, Abbots Langley	£0.000	£0.229	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.229
Abbots Langley	£0.111	£2.857	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£2.967
WH Smith, High Street, Aylesbury	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.096	£0.096
Spar, Turners Place, Holmer Green	£0.000	£0.000	£0.000	£0.000	£0.000	£0.107	£0.000	£0.000	£0.107
Somerfield, Station Approach, Great Missenden	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.096	£0.096
Sainsburys, Canal Way, Ladbroke Grove, London	£0.000	£0.000	£0.000	£0.057	£0.000	£0.000	£0.000	£0.000	£0.057
Redbourn	£0.000	£0.000	£0.000	£0.057	£0.000	£0.000	£0.000	£0.000	£0.057
Morrisons, Wood Green, London	£0.000	£0.000	£0.000	£0.000	£0.090	£0.000	£0.000	£0.000	£0.090
Bobbington	£0.000	£0.114	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.114
Caddington	£0.000	£0.000	£0.000	£0.000	£0.090	£0.000	£0.000	£0.000	£0.090
Chartridge	£0.000	£0.000	£0.000	£0.000	£0.000	£0.107	£0.000	£0.000	£0.107
Chauldon	£0.000	£0.000	£0.078	£0.000	£0.000	£0.000	£0.000	£0.000	£0.078
Costcutter, Greenway Parade, Chesham	£0.000	£0.000	£0.000	£0.000	£0.000	£0.107	£0.000	£0.000	£0.107
Darvell & Sons, High Street, Chesham	£0.000	£0.000	£0.000	£0.000	£0.000	£0.107	£0.000	£0.000	£0.107
Euston Station, Camden, London	£0.000	£0.000	£0.000	£0.000	£0.090	£0.000	£0.000	£0.000	£0.090
Somerfield, Southdown Road, Harpenden	£0.111	£0.000	£0.078	£0.000	£0.000	£0.000	£0.000	£0.000	£0.189
Spar, School Mead, Abbots Langley, Watford	£0.000	£0.229	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.229
Stoke Mandeville	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.192	£0.192
Tesco, Katherine Place, College Road, Abbots Langley	£0.000	£0.229	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.229
Marks & Spencer, Peters Street, St Albans	£0.111	£0.000	£0.000	£0.057	£0.000	£0.000	£0.000	£0.000	£0.168
Local stores, Weston Turville	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.192	£0.192
Aston Clinton	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.192	£0.192
Co-op, High Street, Redbourn	£0.000	£0.000	£0.000	£0.172	£0.000	£0.000	£0.000	£0.000	£0.172
Local stores, Wendover	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.384	£0.384
Local stores, Redbourn	£0.000	£0.000	£0.000	£0.344	£0.000	£0.000	£0.000	£0.000	£0.344
Wendover town centre	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£1.249	£1.249
High Wycombe	£0.000	£0.000	£0.000	£0.057	£0.000	£0.000	£0.000	£0.000	£0.057
Welwyn Garden City	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.096	£0.096
Mail Order	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.096	£0.096
Stevenage	£0.111	£0.000	£0.000	£0.000	£0.000	£0.000	£0.076	£0.000	£0.187
Hatfield	£0.111	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.111
Others Total	£5.310	£6.742	£2.498	£1.722	£2.059	£2.455	£1.371	£4.322	£26.480
Non Dacorum	£7.080	£8.913	£2.576	£3.559	£2.417	£11.314	£1.905	£8.453	£46.217
Internet	£0.000	£0.000	£0.000	£0.057	£0.090	£0.000	£0.000	£0.000	£0.147

Notes: Top Up assumed at25% of total expenditure on convenience goods
Product of Table 4 and Table 3B

Table 8:	Combined Main & Top-Up Food Shopping Patterns (Derived From Household Survey)								
	Z1	Z2	Z3	Z4	Z5	Z6	Z7	Z8	Total
Hemel Hempstead Town Centre									
Asda at Hillfield Road, Hemel Hempstead town centre	13.68%	3.63%	22.44%	1.81%	1.50%	0.00%	0.60%	0.00%	7.06%
Iceland at Hillfield Road, Hemel Hempstead	0.32%	0.00%	0.00%	0.00%	0.00%	0.23%	0.60%	0.00%	0.17%
Marks & Spencer in The Marlowes Centre, Hemel Hempstead town	2.92%	0.91%	4.10%	0.00%	0.71%	0.52%	0.60%	0.25%	1.61%
Other food shops in Hemel Hempstead town centre	2.21%	0.58%	1.10%	0.31%	0.71%	0.23%	0.00%	0.00%	0.95%
Hemel Hempstead TC - Total	19.14%	5.13%	27.64%	2.12%	2.92%	0.97%	1.80%	0.25%	9.79%
Hemel Hempstead Non Town Centre - Major Stores									
Tesco at Jarman Way, Hemel Hempstead	32.34%	6.82%	23.57%	6.93%	3.70%	0.00%	0.00%	0.00%	13.31%
Sainsburys at Apsley, Hemel Hempstead	18.59%	27.28%	13.25%	0.75%	2.21%	0.00%	1.80%	0.00%	11.07%
Sainsburys at Woodall Farm, Hemel Hempstead	7.74%	1.36%	7.75%	12.48%	0.00%	0.00%	0.00%	0.00%	3.77%
Hemel Hempstead Non Town Centre - Major Stores - Total	58.68%	35.46%	44.57%	20.16%	5.91%	0.00%	1.80%	0.00%	28.16%
Hemel Hempstead Non Town Centre - Others									
Tesco Express at Henry Wells Square, Hemel Hempstead	2.42%	0.00%	1.84%	0.00%	0.00%	0.00%	0.00%	0.60%	0.93%
Tesco Express at Stoneycroft, Warners End, Hemel Hempstead	1.12%	0.19%	3.64%	0.00%	0.52%	0.00%	0.00%	0.00%	0.79%
Co-op at Stoneycroft, Warners End, Hemel Hempstead	0.00%	0.00%	1.89%	0.00%	0.00%	0.00%	0.00%	0.00%	0.20%
Co-op at Long Caulden, Hemel Hempstead	0.32%	0.00%	0.92%	0.00%	0.00%	0.00%	0.00%	0.00%	0.19%
Costcutter at Rossgate, Hemel Hempstead	0.10%	0.52%	0.73%	0.00%	0.00%	0.00%	0.00%	0.00%	0.18%
Spar at Leverstock Green Road, Hemel Hempstead	0.40%	0.00%	0.00%	0.75%	0.00%	0.00%	0.00%	0.50%	0.19%
Nash Mills, Hemel Hempstead	0.10%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.03%
Ross Gate	0.00%	0.00%	0.18%	0.00%	0.00%	0.00%	0.00%	0.00%	0.02%
Gadebridge	0.00%	0.00%	0.55%	0.00%	0.00%	0.00%	0.00%	0.00%	0.06%
Adeyfield	0.10%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.03%
Boxmoor	0.20%	0.00%	0.37%	0.00%	0.00%	0.00%	0.00%	0.00%	0.09%
Nisa, Crabtree Lane, Hemel Hempstead	0.20%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.06%
Grovehill	0.00%	0.00%	0.37%	0.00%	0.00%	0.00%	0.00%	0.00%	0.04%
Bennetts End	0.20%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.06%
Tesco, Grove Hill, Hemel Hempstead	0.00%	0.00%	0.73%	0.00%	0.00%	0.00%	0.00%	0.00%	0.08%
Leverstock Green	0.79%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.22%
Local stores, Hemel Hempstead	0.60%	0.19%	0.92%	0.00%	0.00%	0.00%	0.00%	0.00%	0.29%
Local stores, Warners End	0.10%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.03%
Co-op at Queens Square, Hemel Hempstead	0.89%	0.00%	0.18%	0.00%	0.00%	0.00%	0.00%	0.00%	0.27%
Other food shops in Hemel Hempstead (outside the town centre	1.42%	1.75%	1.99%	0.00%	0.00%	0.23%	0.00%	0.00%	0.89%
Hemel Hempstead Non Town Centre - Others - Total	8.96%	2.66%	14.32%	0.75%	0.52%	0.23%	0.00%	1.10%	4.65%
Berkhamsted									
Waitrose in Berkhamsted town centre	1.38%	2.33%	3.36%	1.81%	45.24%	1.20%	9.13%	1.80%	7.61%
Tesco in Berkhamsted town centre	0.10%	0.52%	0.00%	0.00%	13.70%	0.00%	0.00%	0.00%	1.72%
Other food shops in Berkhamsted	0.00%	0.00%	0.00%	0.00%	6.01%	0.00%	0.60%	0.00%	0.76%
Berkhamsted - Total	1.48%	2.86%	3.36%	1.81%	64.95%	1.20%	9.73%	1.80%	10.10%
Tring									
Tesco, London Road, Tring	0.23%	0.19%	0.00%	0.00%	11.94%	0.52%	58.53%	4.73%	7.04%
Marks & Spencer, Dolphin Square, Tring	0.10%	0.19%	0.00%	0.00%	0.00%	0.00%	2.54%	0.50%	0.32%
Tring Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.67%	0.00%	0.06%
Co-op, Silk Mill Way, Tring	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.89%	0.00%	0.08%
Other food shops in Tring	0.00%	0.00%	0.00%	0.00%	0.71%	0.00%	2.90%	0.25%	0.36%
Tring - Total	0.32%	0.39%	0.00%	0.00%	12.66%	0.52%	65.52%	5.48%	7.86%
Others in Dacorum Borough									
Apsley	0.53%	0.52%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.22%
Northchurch	0.10%	0.00%	0.00%	0.00%	0.57%	0.00%	0.00%	0.00%	0.10%
Chipperfield	0.00%	0.58%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.09%
Kings Langley	0.00%	2.14%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.32%
Farm Shop, Tring	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.60%	0.00%	0.05%
Markyate	0.00%	0.00%	0.00%	1.23%	0.00%	0.00%	0.00%	0.00%	0.06%
Spar, High Street, Kings Langley	0.00%	0.19%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.03%
Bovingdon	0.00%	1.36%	0.00%	0.00%	0.00%	0.23%	0.00%	0.00%	0.23%
Local Stores, Markyate	0.00%	0.00%	0.00%	0.31%	0.00%	0.00%	0.00%	0.00%	0.01%
One Stop, High Street, Northchurch	0.00%	0.00%	0.00%	0.00%	0.19%	0.00%	0.00%	0.00%	0.02%
Local stores, Potten End	0.00%	0.00%	0.00%	0.00%	0.76%	0.00%	0.00%	0.00%	0.09%
Flamstead	0.00%	0.00%	0.00%	0.93%	0.00%	0.00%	0.00%	0.00%	0.04%
Little Gaddesden	0.00%	0.00%	0.00%	0.00%	0.57%	0.00%	0.00%	0.00%	0.07%
Others in Dacorum Borough - Total	0.63%	4.81%	0.00%	2.47%	2.09%	0.23%	0.60%	0.00%	1.32%
Aylesbury									
Aylesbury	0.00%	0.72%	0.00%	0.00%	0.52%	0.00%	5.09%	41.24%	4.62%
Tesco, Tring Road, Aylesbury	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.62%	14.44%	1.63%
Tesco, Bicester Road, Aylesbury	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.80%	5.40%	0.68%
Morrisons, Station Way, Aylesbury	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.20%	2.40%	0.34%
Marks & Spencer, High Street, Aylesbury	0.32%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.45%	0.23%
Lidl, Cambridge close Retail Park, Aylesbury	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.60%	0.00%	0.05%
Sainsburys, Buckingham Street, Aylesbury	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.05%	0.20%
Total	0.32%	0.72%	0.00%	0.00%	0.52%	0.00%	11.30%	66.97%	7.75%
Chesham									
Chesham	0.00%	1.17%	0.00%	0.00%	0.71%	43.11%	2.02%	0.00%	5.56%
Sainsburys, Elgiva Lane, Chesham	0.10%	0.52%	0.00%	0.00%	0.00%	18.66%	0.00%	0.00%	2.33%
Waitrose, The Backs, Chesham	0.00%	0.52%	0.00%	0.00%	0.00%	16.49%	0.00%	0.00%	2.04%
Total	0.10%	2.21%	0.00%	0.00%	0.71%	78.26%	2.02%	0.00%	9.92%
St Albans/London Colney									
St Albans	1.12%	0.97%	0.00%	12.44%	0.19%	0.00%	0.00%	0.00%	1.06%
Waitrose, Ermine Close, Mayne Avenue, St Albans	0.85%	0.52%	0.00%	3.62%	0.00%	0.00%	0.00%	0.60%	0.54%
Sainsburys, Everard Close, St Albans	0.00%	0.00%	0.00%	4.81%	0.00%	0.23%	0.00%	0.00%	0.25%
Tesco, St Peters Street, St Albans	0.23%	0.00%	0.00%	0.75%	0.00%	0.00%	0.00%	0.00%	0.10%
Morrisons, Hatfield Road, St Albans	0.00%	0.00%	0.00%	0.75%	0.00%	0.00%	0.00%	0.00%	0.03%
Sainsburys, Barnet Road, London Colney, St Albans	0.53%	0.00%	0.00%	1.50%	0.00%	0.00%	0.00%	0.00%	0.22%
Marks & Spencer, Colney Fields Shopping park, London Colney	0.23%	0.52%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.14%
Total	2.95%	2.02%	0.00%	23.86%	0.19%	0.23%	0.00%	0.60%	2.34%
Amersham									
Amersham	0.10%	0.91%	0.00%	0.00%	0.00%	5.92%	0.00%	0.00%	0.87%
Tesco, London Road West, Amersham	0.00%	0.52%	0.00%	0.00%	0.00%	4.72%	0.00%	0.60%	0.70%
Total	0.10%	1.44%	0.00%	0.00%	0.00%	10.64%	0.00%	0.60%	1.56%
Watford									
Watford	1.25%	18.38%	0.71%	0.75%	0.19%	0.52%	0.82%	0.00%	3.32%
Asda, St Albans Road, Watford	0.00%	4.49%	0.52%	0.00%	0.00%	0.00%	0.00%	0.60%	0.77%
Costco, Hartspring Lane, Watford	0.00%	0.00%	0.00%	0.75%	0.52%	0.00%	0.00%	0.00%	0.10%
Sainsburys, Dome Roundabout, North Western Avenue, Watford	0.00%	1.36%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.20%
Total	1.25%	24.23%	1.23%	1.50%	0.71%	0.52%	0.82%	0.60%	4.39%
Dunstable									
Dunstable	0.00%	0.00%	0.00%	10.98%	1.16%	0.00%	0.00%	0.00%	0.65%
Sainsburys, Luton Road, Dunstable	0.00%	0.00%	0.00%	6.62%	0.52%	0.00%	0.00%	0.00%	0.37%
Asda, Court Road, Dunstable	0.00%	0.00%	0.00%	2.25%	0.00%	0.00%	0.00%	0.00%	0.10%
Tesco, High Street North, Dunstable	0.00%	0.00%	0.00%	1.50%	0.00%	0.00%	0.00%	0.00%	0.07%
Total	0.00%	0.00%	0.00%	21.35%	1.69%	0.00%	0.00%	0.00%	1.20%
Harpenden									
Harpenden	0.10%	0.00%	0.00%	6.79%	0.00%	0.00%	0.00%	0.00%	0.34%
Waitrose, Leyton Road, Harpenden	0.00%	0.00%	0.00%	4.06%	0.00%	0.00%	0.00%	0.00%	0.19%
Sainsburys, High Street, Harpenden	0.00%	0.00%	0.00%	1.06%	0.00%	0.00%	0.00%	0.00%	0.05%
Total	0.10%	0.00%	0.00%	11.91%	0.00%	0.00%	0.00%	0.00%	0.58%
Wendover									
Budgens, High Street, Wendover	0.00%	0.00%	0.00%	0.00%	0.00%	0.52%	0.00%	4.63%	0.51%
Tesco, Tring Road, Wendover	0.00%	0.00%	0.00%	0.00%	0.52%	0.00%	0.00%	2.05%	0.26%
Total	0.00%	0.00%	0.00%	0.00%	0.52%	0.52%	0.00%	6.68%	0.77%
Others									
Leighton Buzzard	0.00%	0.19%	0.00%	0.31%	0.00%	0.00%	0.60%	0.60%	0.15%
Don't know/No Answer	0.00%	0.72%	0.00%	1.37%	0.19%	0.00%	0.00%	0.00%	0.19%
Beaconsfield	0.00%	0.00%	0.00%	0.00%	0.19%	0.52%	0.00%	0.00%	0.08%
Local convenience shops	4.50%	5.39%	5.51%	4.32%	3.95%	4.28%	4.39%	5.06%	4.68%
High Wycombe	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.60%	0.06%
Luton	0.00%	0.00%	0.00%	0.75%	0.00%	0.00%	0.00%	0.00%	0.03%
Local stores, Bushey	0.00%	0.52%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.08%
Sainsburys, Albert Road South, Garston	0.00%	0.52%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.08%
Tesco, Adeyfield	0.23%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.06%
Tesco, Harefield Road, Rickmansworth	0.00%	0.52%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.08%
Tesco, Longwick Road, Princes Risborough	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.60%	0.06%
Tesco, The Luton Arndale Centre, Luton	0.00%	0.00%	0.00%	0.75%	0.00%	0.00%	0.00%	0.00%	0.03%
Budgens, High Street, Abbots Langley	0.00%	1.88%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.28%
Abbots Langley	0.10%	5.84%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.89%
WH Smith, High Street, Aylesbury	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.25%	0.02%
Spar, Turners Place, Holmer Green	0.00%	0.00%	0.00%	0.00%	0.00%	0.23%	0.00%	0.00%	0.03%
Somerfield, Station Approach, Great Missenden	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.25%	0.02%
Sainsburys, Canal Way, Ladbroke Grove, London	0.00%	0.00%	0.00%	0.31%	0.00%	0.00%	0.00%	0.00%	0.01%
Redbourn	0.00%	0.00%	0.00%	0.31%	0.00%	0.00%	0.00%	0.00%	0.01%
Morrisons, Wood Green, London	0.00%	0.00%	0.00%	0.00%	0.19%	0.00%	0.00%	0.00%	0.02%
Bobbington	0.00%	0.19%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.03%
Caddington	0.00%	0.00%	0.00%	0.00%	0.19%	0.00%	0.00%	0.00%	0.02%
Chartridge	0.00%	0.00%	0.00%	0.00%	0.00%	0.23%	0.00%	0.00%	0.03%
Chauldon	0.00%	0.00%	0.18%	0.00%	0.00%	0.00%	0.00%	0.00%	0.02%
Costcutter, Greenway Parade, Chesham	0.00%	0.00%	0.00%	0.00%	0.00%	0.23%	0.00%	0.00%	0.03%
Darvell & Sons, High Street, Chesham	0.00%	0.00%	0.00%	0.00%	0.00%	0.23%	0.00%	0.00%	0.03%
Euston Station, Camden, London	0.00%	0.00%	0.00%	0.00%	0.19%	0.00%	0.00%	0.00%	0.02%
Somerfield, Southdown Road, Harpenden	0.10%	0.00%	0.18%	0.00%	0.00%	0.00%	0.00%	0.00%	0.05%
Spar, School Mead, Abbots Langley, Watford	0.00%	0.39%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.06%
Stoke Mandeville	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.50%	0.05%
Tesco, Katherine Place, College Road, Abbots Langley	0.00%	0.39%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.06%
Marks & Spencer, Peters Street, St Albans	0.10%	0.00%	0.00%	0.31%	0.00%	0.00%	0.00%	0.00%	0.04%
Local stores, Weston Turville	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.50%	0.05%
Aston Clinton	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.50%	0.05%
Co-op, High Street, Redbourn	0.00%	0.00%	0.00%	0.93%	0.00%	0.00%	0.00%	0.00%	0.04%
Local stores, Wendover	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.99%	0.10%
Local stores, Redbourn	0.00%	0.00%	0.00%	1.85%	0.00%	0.00%	0.00%	0.00%	0.09%
Wendover town centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.22%	0.31%
High Wycombe	0.00%	0.00%	0.00%	0.31%	0.00%	0.00%	0.00%	0.00%	0.01%
Welwyn Garden City	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.25%	0.02%
Mail Order	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.25%	0.02%
Stevenage	0.10%	0.00%	0.00%	0.00%	0.00%	0.00%	0.22%	0.00%	0.05%
Hatfield	0.10%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.03%
Others Total	5.22%	16.57%	5.87%	11.51%	4.90%	5.70%	5.21%	13.54%	8.08%
Non Dacorum	10.04%	47.19%	7.11%	70.14%	9.25%	95.88%	19.35%	88.98%	36.60%
Internet	0.75%	1.50%	3.00%	2.56%	1.69%	0.97%	1.20%	2.40%	1.52%

Table 9 :	Combined Food Shopping Market Share Turnovers (From Household Survey)								2009
Applied to 2009 Expenditure Potential	Z1	Z2	Z3	Z4	Z5	Z6	Z7	Z8	Total
Hemel Hempstead TC									
Asda at Hillfield Road, Hemel Hempstead town centre	£15.232	£2.133	£9.545	£0.336	£0.704	£0.000	£0.205	£0.000	£28.155
Iceland at Hillfield Road, Hemel Hempstead	£0.362	£0.000	£0.000	£0.000	£0.000	£0.107	£0.205	£0.000	£0.673
Marks & Spencer in The Marlowes Centre, Hemel Hempstead town	£3.251	£0.536	£1.742	£0.000	£0.336	£0.249	£0.205	£0.096	£6.414
Other food shops in Hemel Hempstead town centre	£2.466	£0.343	£0.468	£0.057	£0.336	£0.107	£0.000	£0.000	£3.777
Hemel Hempstead TC - Total	£21.311	£3.011	£11.756	£0.394	£1.375	£0.462	£0.614	£0.096	£39.019
Hemel Hempstead Non Town Centre - Major Stores									
Tesco at Jarman Way, Hemel Hempstead	£36.013	£4.002	£10.026	£1.288	£1.743	£0.000	£0.000	£0.000	£53.073
Sainsburys at Apsley, Hemel Hempstead	£20.703	£16.009	£5.634	£0.139	£1.039	£0.000	£0.614	£0.000	£44.140
Sainsburys at Woodall Farm, Hemel Hempstead	£8.620	£0.799	£3.297	£2.322	£0.000	£0.000	£0.000	£0.000	£15.037
Hemel Hempstead Non Town Centre - Major Stores - Total	£65.336	£20.811	£18.957	£3.750	£2.783	£0.000	£0.614	£0.000	£112.250
Hemel Hempstead Non Town Centre - Others									
Hemel Hempstead Non Town Centre - Others - Total	£9.980	£1.563	£6.090	£0.139	£0.246	£0.107	£0.000	£0.425	£18.551
Berkhamsted									
Waitrose in Berkhamsted town centre	£1.532	£1.369	£1.430	£0.336	£21.284	£0.569	£3.123	£0.698	£30.342
Tesco in Berkhamsted town centre	£0.111	£0.307	£0.000	£0.000	£6.447	£0.000	£0.000	£0.000	£6.865
Other food shops in Berkhamsted	£0.000	£0.000	£0.000	£0.000	£2.830	£0.000	£0.205	£0.000	£3.035
Berkhamsted - Total	£1.643	£1.677	£1.430	£0.336	£30.561	£0.569	£3.327	£0.698	£40.242
Tring									
Tesco, London Road, Tring	£0.251	£0.114	£0.000	£0.000	£5.619	£0.249	£20.009	£1.837	£28.078
Marks & Spencer, Dolphin Square, Tring	£0.111	£0.114	£0.000	£0.000	£0.000	£0.000	£0.867	£0.192	£1.284
Tring Town Centre	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.229	£0.000	£0.229
Co-op, Silk Mill Way, Tring	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.305	£0.000	£0.305
Other food shops in Tring	£0.000	£0.000	£0.000	£0.000	£0.336	£0.000	£0.990	£0.096	£1.422
Tring - Total	£0.362	£0.229	£0.000	£0.000	£5.955	£0.249	£22.399	£2.125	£31.318
Others in Dacorum Borough									
Others in Dacorum Borough - Total	£0.696	£2.820	£0.000	£0.459	£0.985	£0.107	£0.205	£0.000	£5.272
Aylesbury Total	£0.362	£0.421	£0.000	£0.000	£0.246	£0.000	£3.863	£25.987	£30.879
Chesham Total	£0.111	£1.299	£0.000	£0.000	£0.336	£37.117	£0.691	£0.000	£39.553
St Albans/London Colney Total	£3.283	£1.185	£0.000	£4.439	£0.090	£0.107	£0.000	£0.233	£9.336
Amersham Total	£0.111	£0.843	£0.000	£0.000	£0.000	£5.048	£0.000	£0.233	£6.234
Watford Total	£1.389	£14.220	£0.524	£0.279	£0.336	£0.249	£0.281	£0.233	£17.510
Dunstable Total	£0.000	£0.000	£0.000	£3.971	£0.793	£0.000	£0.000	£0.000	£4.764
Harpenden Total	£0.111	£0.000	£0.000	£2.215	£0.000	£0.000	£0.000	£0.000	£2.326
Wendover Total	£0.000	£0.000	£0.000	£0.000	£0.246	£0.249	£0.000	£2.590	£3.085
Others Non Dacorum	£5.812	£9.726	£2.498	£2.141	£2.305	£2.704	£1.781	£5.254	£32.220
Non Dacorum Total	£11.178	£27.693	£3.022	£13.045	£4.352	£45.472	£6.615	£34.530	£145.907
Internet	£0.836	£0.878	£1.274	£0.476	£0.793	£0.462	£0.410	£0.931	£6.060

Notes:

Table 9 :	Combined Food Shopping Market Share Turnovers (From Household Survey)								2011
Applied to 2011 Expenditure Potential	**Z1**	**Z2**	**Z3**	**Z4**	**Z5**	**Z6**	**Z7**	**Z8**	**Total**
Hemel Hempstead TC									
Asda at Hillfield Road, Hemel Hempstead town centre	£15.753	£2.159	£9.926	£0.343	£0.717	£0.000	£0.209	£0.000	£29.106
Iceland at Hillfield Road, Hemel Hempstead	£0.374	£0.000	£0.000	£0.000	£0.000	£0.110	£0.209	£0.000	£0.692
Marks & Spencer in The Marlowes Centre, Hemel Hempstead town	£3.362	£0.542	£1.812	£0.000	£0.342	£0.256	£0.209	£0.098	£6.621
Other food shops in Hemel Hempstead town centre	£2.550	£0.347	£0.487	£0.058	£0.342	£0.110	£0.000	£0.000	£3.895
Hemel Hempstead TC - Total	£22.039	£3.048	£12.225	£0.401	£1.401	£0.476	£0.626	£0.098	£40.314
Hemel Hempstead Non Town Centre - Major Stores									
Tesco at Jarman Way, Hemel Hempstead	£37.245	£4.051	£10.426	£1.313	£1.776	£0.000	£0.000	£0.000	£54.810
Sainsburys at Apsley, Hemel Hempstead	£21.411	£16.204	£5.859	£0.142	£1.059	£0.000	£0.626	£0.000	£45.301
Sainsburys at Woodall Farm, Hemel Hempstead	£8.915	£0.809	£3.428	£2.366	£0.000	£0.000	£0.000	£0.000	£15.517
Hemel Hempstead Non Town Centre - Major Stores - Total	£67.570	£21.064	£19.713	£3.821	£2.834	£0.000	£0.626	£0.000	£115.628
Hemel Hempstead Non Town Centre - Others									
Hemel Hempstead Non Town Centre - Others - Total	£10.321	£1.582	£6.333	£0.142	£0.251	£0.110	£0.000	£0.433	£19.172
Berkhamsted									
Waitrose in Berkhamsted town centre	£1.585	£1.386	£1.487	£0.343	£21.681	£0.586	£3.179	£0.712	£30.959
Tesco in Berkhamsted town centre	£0.114	£0.311	£0.000	£0.000	£6.568	£0.000	£0.000	£0.000	£6.993
Other food shops in Berkhamsted	£0.000	£0.000	£0.000	£0.000	£2.883	£0.000	£0.209	£0.000	£3.091
Berkhamsted - Total	£1.699	£1.697	£1.487	£0.343	£31.131	£0.586	£3.388	£0.712	£41.043
Tring									
Tesco, London Road, Tring	£0.259	£0.116	£0.000	£0.000	£5.724	£0.256	£20.371	£1.871	£28.597
Marks & Spencer, Dolphin Square, Tring	£0.114	£0.116	£0.000	£0.000	£0.000	£0.000	£0.882	£0.196	£1.308
Tring Town Centre	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.233	£0.000	£0.233
Co-op, Silk Mill Way, Tring	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.310	£0.000	£0.310
Other food shops in Tring	£0.000	£0.000	£0.000	£0.000	£0.342	£0.000	£1.008	£0.098	£1.448
Tring - Total	£0.374	£0.231	£0.000	£0.000	£6.066	£0.256	£22.805	£2.164	£31.897
Others in Dacorum Borough									
Others in Dacorum Borough - Total	£0.720	£2.854	£0.000	£0.468	£1.003	£0.110	£0.209	£0.000	£5.364
Aylesbury Total	£0.374	£0.427	£0.000	£0.000	£0.251	£0.000	£3.933	£26.471	£31.455
Chesham Total	£0.114	£1.315	£0.000	£0.000	£0.342	£38.253	£0.703	£0.000	£40.727
St Albans/London Colney Total	£3.396	£1.199	£0.000	£4.523	£0.091	£0.110	£0.000	£0.237	£9.556
Amersham Total	£0.114	£0.853	£0.000	£0.000	£0.000	£5.202	£0.000	£0.237	£6.407
Watford Total	£1.437	£14.393	£0.545	£0.284	£0.342	£0.256	£0.286	£0.237	£17.780
Dunstable Total	£0.000	£0.000	£0.000	£4.046	£0.808	£0.000	£0.000	£0.000	£4.854
Harpenden Total	£0.114	£0.000	£0.000	£2.257	£0.000	£0.000	£0.000	£0.000	£2.372
Wendover Total	£0.000	£0.000	£0.000	£0.000	£0.251	£0.256	£0.000	£2.639	£3.146
Others Non Dacorum	£6.010	£9.844	£2.598	£2.181	£2.348	£2.787	£1.813	£5.352	£32.933
Non Dacorum Total	£11.560	£28.030	£3.142	£13.292	£4.433	£46.864	£6.735	£35.173	£149.230
Internet	*£0.836*	*£0.878*	*£1.274*	*£0.476*	*£0.793*	*£0.462*	*£0.410*	*£0.931*	*£6.060*

Notes:

Table 11 :	Combined Food Shopping Market Share Turnovers (From Household Survey)								2016
Applied to 2016 Expenditure Potential	Z1	Z2	Z3	Z4	Z5	Z6	Z7	Z8	Total
Hemel Hempstead TC									
Asda at Hillfield Road, Hemel Hempstead town centre	£17.043	£2.242	£10.952	£0.359	£0.756	£0.000	£0.219	£0.000	£31.571
Iceland at Hillfield Road, Hemel Hempstead	£0.405	£0.000	£0.000	£0.000	£0.000	£0.119	£0.219	£0.000	£0.742
Marks & Spencer in The Marlowes Centre, Hemel Hempstead town	£3.638	£0.563	£1.999	£0.000	£0.361	£0.277	£0.219	£0.102	£7.159
Other food shops in Hemel Hempstead town centre	£2.759	£0.360	£0.537	£0.061	£0.361	£0.119	£0.000	£0.000	£4.198
Hemel Hempstead TC - Total	£23.845	£3.165	£13.489	£0.420	£1.478	£0.515	£0.657	£0.102	£43.670
Hemel Hempstead Non Town Centre - Major Stores									
Tesco at Jarman Way, Hemel Hempstead	£40.296	£4.206	£11.504	£1.375	£1.873	£0.000	£0.000	£0.000	£59.255
Sainsburys at Apsley, Hemel Hempstead	£23.165	£16.827	£6.465	£0.149	£1.117	£0.000	£0.657	£0.000	£48.379
Sainsburys at Woodall Farm, Hemel Hempstead	£9.645	£0.840	£3.783	£2.479	£0.000	£0.000	£0.000	£0.000	£16.746
Hemel Hempstead Non Town Centre - Major Stores - Total	£73.106	£21.873	£21.751	£4.003	£2.990	£0.000	£0.657	£0.000	£124.380
Hemel Hempstead Non Town Centre - Others									
Hemel Hempstead Non Town Centre - Others - Total	£11.167	£1.643	£6.988	£0.149	£0.265	£0.119	£0.000	£0.451	£20.781
Berkhamsted									
Waitrose in Berkhamsted town centre	£1.715	£1.439	£1.641	£0.359	£22.870	£0.634	£3.337	£0.742	£32.736
Tesco in Berkhamsted town centre	£0.124	£0.323	£0.000	£0.000	£6.928	£0.000	£0.000	£0.000	£7.375
Other food shops in Berkhamsted	£0.000	£0.000	£0.000	£0.000	£3.041	£0.000	£0.219	£0.000	£3.260
Berkhamsted - Total	£1.838	£1.762	£1.641	£0.359	£32.839	£0.634	£3.556	£0.742	£43.371
Tring									
Tesco, London Road, Tring	£0.281	£0.120	£0.000	£0.000	£6.038	£0.277	£21.382	£1.950	£30.048
Marks & Spencer, Dolphin Square, Tring	£0.124	£0.120	£0.000	£0.000	£0.000	£0.000	£0.926	£0.204	£1.374
Tring Town Centre	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.244	£0.000	£0.244
Co-op, Silk Mill Way, Tring	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.326	£0.000	£0.326
Other food shops in Tring	£0.000	£0.000	£0.000	£0.000	£0.361	£0.000	£1.058	£0.102	£1.521
Tring - Total	£0.405	£0.240	£0.000	£0.000	£6.399	£0.277	£23.936	£2.256	£33.513
Others in Dacorum Borough									
Others in Dacorum Borough - Total	£0.779	£2.964	£0.000	£0.490	£1.058	£0.119	£0.219	£0.000	£5.629
Aylesbury Total	£0.405	£0.443	£0.000	£0.000	£0.265	£0.000	£4.128	£27.593	£32.832
Chesham Total	£0.124	£1.365	£0.000	£0.000	£0.361	£41.362	£0.738	£0.000	£43.950
St Albans/London Colney Total	£3.674	£1.245	£0.000	£4.739	£0.096	£0.119	£0.000	£0.247	£10.120
Amersham Total	£0.124	£0.886	£0.000	£0.000	£0.000	£5.625	£0.000	£0.247	£6.882
Watford Total	£1.555	£14.945	£0.601	£0.298	£0.361	£0.277	£0.300	£0.247	£18.585
Dunstable Total	£0.000	£0.000	£0.000	£4.240	£0.852	£0.000	£0.000	£0.000	£5.092
Harpenden Total	£0.124	£0.000	£0.000	£2.365	£0.000	£0.000	£0.000	£0.000	£2.489
Wendover Total	£0.000	£0.000	£0.000	£0.000	£0.265	£0.277	£0.000	£2.750	£3.292
Others Non Dacorum	£6.503	£10.222	£2.866	£2.285	£2.477	£3.013	£1.903	£5.578	£34.848
Non Dacorum Total	£12.507	£29.107	£3.467	£13.927	£4.676	£50.674	£7.069	£36.663	£158.091
Internet	*£0.836*	*£0.878*	*£1.274*	*£0.476*	*£0.793*	*£0.462*	*£0.410*	*£0.931*	*£6.060*

Notes:

Table 12 :	Combined Food Shopping Market Share Turnovers (From Household Survey)								2021
Applied to 2021 Expenditure Potential	**Z1**	**Z2**	**Z3**	**Z4**	**Z5**	**Z6**	**Z7**	**Z8**	**Total**
Hemel Hempstead TC									
Asda at Hillfield Road, Hemel Hempstead town centre	£18.402	£2.328	£12.035	£0.376	£0.797	£0.000	£0.230	£0.000	£34.167
Iceland at Hillfield Road, Hemel Hempstead	£0.437	£0.000	£0.000	£0.000	£0.000	£0.129	£0.230	£0.000	£0.795
Marks & Spencer in The Marlowes Centre, Hemel Hempstead town	£3.927	£0.585	£2.197	£0.000	£0.380	£0.300	£0.230	£0.107	£7.725
Other food shops in Hemel Hempstead town centre	£2.979	£0.374	£0.591	£0.064	£0.380	£0.129	£0.000	£0.000	£4.517
Hemel Hempstead TC - Total	£25.745	£3.286	£14.822	£0.440	£1.558	£0.557	£0.689	£0.107	£47.204
Hemel Hempstead Non Town Centre - Major Stores									
Tesco at Jarman Way, Hemel Hempstead	£43.507	£4.368	£12.641	£1.441	£1.975	£0.000	£0.000	£0.000	£63.932
Sainsburys at Apsley, Hemel Hempstead	£25.011	£17.472	£7.104	£0.156	£1.178	£0.000	£0.689	£0.000	£51.610
Sainsburys at Woodall Farm, Hemel Hempstead	£10.413	£0.872	£4.157	£2.597	£0.000	£0.000	£0.000	£0.000	£18.039
Hemel Hempstead Non Town Centre - Major Stores - Total	£78.931	£22.712	£23.901	£4.194	£3.152	£0.000	£0.689	£0.000	£133.580
Hemel Hempstead Non Town Centre - Others									
Hemel Hempstead Non Town Centre - Others - Total	£12.057	£1.706	£7.678	£0.156	£0.279	£0.129	£0.000	£0.472	£22.476
Berkhamsted									
Waitrose in Berkhamsted town centre	£1.851	£1.495	£1.803	£0.376	£24.113	£0.685	£3.502	£0.775	£34.600
Tesco in Berkhamsted town centre	£0.134	£0.335	£0.000	£0.000	£7.305	£0.000	£0.000	£0.000	£7.773
Other food shops in Berkhamsted	£0.000	£0.000	£0.000	£0.000	£3.206	£0.000	£0.230	£0.000	£3.436
Berkhamsted - Total	£1.985	£1.830	£1.803	£0.376	£34.624	£0.685	£3.731	£0.775	£45.809
Tring									
Tesco, London Road, Tring	£0.303	£0.125	£0.000	£0.000	£6.366	£0.300	£22.436	£2.038	£31.568
Marks & Spencer, Dolphin Square, Tring	£0.134	£0.125	£0.000	£0.000	£0.000	£0.000	£0.972	£0.213	£1.443
Tring Town Centre	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.256	£0.000	£0.256
Co-op, Silk Mill Way, Tring	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.342	£0.000	£0.342
Other food shops in Tring	£0.000	£0.000	£0.000	£0.000	£0.380	£0.000	£1.111	£0.107	£1.598
Tring - Total	£0.437	£0.249	£0.000	£0.000	£6.747	£0.300	£25.117	£2.358	£35.207
Others in Dacorum Borough									
Others in Dacorum Borough - Total	£0.841	£3.078	£0.000	£0.514	£1.116	£0.129	£0.230	£0.000	£5.906
Aylesbury Total	£0.437	£0.460	£0.000	£0.000	£0.279	£0.000	£4.331	£28.836	£34.343
Chesham Total	£0.134	£1.418	£0.000	£0.000	£0.380	£44.705	£0.774	£0.000	£47.411
St Albans/London Colney Total	£3.967	£1.293	£0.000	£4.965	£0.101	£0.129	£0.000	£0.258	£10.712
Amersham Total	£0.134	£0.920	£0.000	£0.000	£0.000	£6.080	£0.000	£0.258	£7.391
Watford Total	£1.679	£15.519	£0.661	£0.312	£0.380	£0.300	£0.315	£0.258	£19.424
Dunstable Total	£0.000	£0.000	£0.000	£4.442	£0.899	£0.000	£0.000	£0.000	£5.340
Harpenden Total	£0.134	£0.000	£0.000	£2.478	£0.000	£0.000	£0.000	£0.000	£2.611
Wendover Total	£0.000	£0.000	£0.000	£0.000	£0.279	£0.300	£0.000	£2.874	£3.453
Others Non Dacorum	£7.021	£10.614	£3.149	£2.394	£2.612	£3.257	£1.997	£5.830	£36.874
Non Dacorum Total	£13.504	£30.224	£3.810	£14.591	£4.931	£54.769	£7.418	£38.315	£167.560
Internet	*£0.836*	*£0.878*	*£1.274*	*£0.476*	*£0.793*	*£0.462*	*£0.410*	*£0.931*	*£6.060*

Notes:

Table 13 :	Combined Food Shopping Market Share Turnovers (From Household Survey)								2026
Applied to 2026 Expenditure Potential	**Z1**	**Z2**	**Z3**	**Z4**	**Z5**	**Z6**	**Z7**	**Z8**	**Total**
Hemel Hempstead TC									
Asda at Hillfield Road, Hemel Hempstead town centre	£19.830	£2.417	£13.177	£0.394	£0.840	£0.000	£0.241	£0.000	£36.899
Iceland at Hillfield Road, Hemel Hempstead	£0.471	£0.000	£0.000	£0.000	£0.000	£0.138	£0.241	£0.000	£0.850
Marks & Spencer in The Marlowes Centre, Hemel Hempstead town	£4.232	£0.607	£2.405	£0.000	£0.401	£0.322	£0.241	£0.111	£8.320
Other food shops in Hemel Hempstead town centre	£3.210	£0.388	£0.647	£0.067	£0.401	£0.138	£0.000	£0.000	£4.852
Hemel Hempstead TC - Total	£27.744	£3.412	£16.229	£0.461	£1.642	£0.598	£0.723	£0.111	£50.921
Hemel Hempstead Non Town Centre - Major Stores									
Tesco at Jarman Way, Hemel Hempstead	£46.885	£4.535	£13.841	£1.509	£2.081	£0.000	£0.000	£0.000	£68.852
Sainsburys at Apsley, Hemel Hempstead	£26.953	£18.142	£7.778	£0.163	£1.241	£0.000	£0.723	£0.000	£55.000
Sainsburys at Woodall Farm, Hemel Hempstead	£11.222	£0.905	£4.551	£2.720	£0.000	£0.000	£0.000	£0.000	£19.399
Hemel Hempstead Non Town Centre - Major Stores - Total	£85.060	£23.583	£26.169	£4.393	£3.322	£0.000	£0.723	£0.000	£143.250
Hemel Hempstead Non Town Centre - Others									
Hemel Hempstead Non Town Centre - Others - Total	£12.993	£1.771	£8.407	£0.163	£0.294	£0.138	£0.000	£0.493	£24.260
Berkhamsted									
Waitrose in Berkhamsted town centre	£1.995	£1.552	£1.974	£0.394	£25.414	£0.736	£3.673	£0.810	£36.549
Tesco in Berkhamsted town centre	£0.144	£0.348	£0.000	£0.000	£7.698	£0.000	£0.000	£0.000	£8.190
Other food shops in Berkhamsted	£0.000	£0.000	£0.000	£0.000	£3.379	£0.000	£0.241	£0.000	£3.620
Berkhamsted - Total	£2.139	£1.900	£1.974	£0.394	£36.491	£0.736	£3.914	£0.810	£48.359
Tring									
Tesco, London Road, Tring	£0.327	£0.129	£0.000	£0.000	£6.710	£0.322	£23.537	£2.131	£33.156
Marks & Spencer, Dolphin Square, Tring	£0.144	£0.129	£0.000	£0.000	£0.000	£0.000	£1.020	£0.223	£1.516
Tring Town Centre	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.269	£0.000	£0.269
Co-op, Silk Mill Way, Tring	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.359	£0.000	£0.359
Other food shops in Tring	£0.000	£0.000	£0.000	£0.000	£0.401	£0.000	£1.165	£0.111	£1.678
Tring - Total	£0.471	£0.259	£0.000	£0.000	£7.111	£0.322	£26.349	£2.465	£36.977
Others in Dacorum Borough									
Others in Dacorum Borough - Total	£0.906	£3.196	£0.000	£0.538	£1.176	£0.138	£0.241	£0.000	£6.195
Aylesbury Total	£0.471	£0.478	£0.000	£0.000	£0.294	£0.000	£4.544	£30.151	£35.937
Chesham Total	£0.144	£1.472	£0.000	£0.000	£0.401	£48.047	£0.812	£0.000	£50.876
St Albans/London Colney Total	£4.274	£1.343	£0.000	£5.200	£0.107	£0.138	£0.000	£0.270	£11.332
Amersham Total	£0.144	£0.955	£0.000	£0.000	£0.000	£6.534	£0.000	£0.270	£7.903
Watford Total	£1.809	£16.114	£0.723	£0.327	£0.401	£0.322	£0.331	£0.270	£20.296
Dunstable Total	£0.000	£0.000	£0.000	£4.652	£0.947	£0.000	£0.000	£0.000	£5.599
Harpenden Total	£0.144	£0.000	£0.000	£2.595	£0.000	£0.000	£0.000	£0.000	£2.739
Wendover Total	£0.000	£0.000	£0.000	£0.000	£0.294	£0.322	£0.000	£3.005	£3.622
Others Non Dacorum	£7.566	£11.021	£3.448	£2.508	£2.753	£3.500	£2.095	£6.096	£38.987
Non Dacorum Total	£14.552	£31.382	£4.172	£15.282	£5.197	£58.864	£7.782	£40.063	£177.293
Internet	*£0.836*	*£0.878*	*£1.274*	*£0.476*	*£0.793*	*£0.462*	*£0.410*	*£0.931*	*£6.060*

Notes:

Table 14 :	Combined Food Shopping Market Share Turnovers (From Household Survey)								2031
Applied to 2031 Expenditure Potential	**Z1**	**Z2**	**Z3**	**Z4**	**Z5**	**Z6**	**Z7**	**Z8**	**Total**
Hemel Hempstead TC									
Asda at Hillfield Road, Hemel Hempstead town centre	£21.333	£2.509	£14.381	£0.413	£0.885	£0.000	£0.253	£0.000	£39.773
Iceland at Hillfield Road, Hemel Hempstead	£0.506	£0.000	£0.000	£0.000	£0.000	£0.146	£0.253	£0.000	£0.905
Marks & Spencer in The Marlowes Centre, Hemel Hempstead town	£4.553	£0.630	£2.625	£0.000	£0.422	£0.339	£0.253	£0.116	£8.939
Other food shops in Hemel Hempstead town centre	£3.454	£0.403	£0.706	£0.070	£0.422	£0.146	£0.000	£0.000	£5.201
Hemel Hempstead TC - Total	£29.846	£3.543	£17.711	£0.483	£1.730	£0.631	£0.758	£0.116	£54.818
Hemel Hempstead Non Town Centre - Major Stores									
Tesco at Jarman Way, Hemel Hempstead	£50.438	£4.709	£15.105	£1.580	£2.193	£0.000	£0.000	£0.000	£74.025
Sainsburys at Apsley, Hemel Hempstead	£28.995	£18.837	£8.488	£0.171	£1.308	£0.000	£0.758	£0.000	£58.557
Sainsburys at Woodall Farm, Hemel Hempstead	£12.072	£0.940	£4.967	£2.849	£0.000	£0.000	£0.000	£0.000	£20.828
Hemel Hempstead Non Town Centre - Major Stores - Total	£91.505	£24.485	£28.560	£4.600	£3.500	£0.000	£0.758	£0.000	£153.409
Hemel Hempstead Non Town Centre - Others									
Hemel Hempstead Non Town Centre - Others - Total	£13.977	£1.839	£9.175	£0.171	£0.310	£0.146	£0.000	£0.514	£26.132
Berkhamsted									
Waitrose in Berkhamsted town centre	£2.146	£1.611	£2.155	£0.413	£26.773	£0.776	£3.853	£0.845	£38.571
Tesco in Berkhamsted town centre	£0.155	£0.361	£0.000	£0.000	£8.110	£0.000	£0.000	£0.000	£8.626
Other food shops in Berkhamsted	£0.000	£0.000	£0.000	£0.000	£3.560	£0.000	£0.253	£0.000	£3.812
Berkhamsted - Total	£2.301	£1.973	£2.155	£0.413	£38.443	£0.776	£4.105	£0.845	£51.010
Tring									
Tesco, London Road, Tring	£0.351	£0.134	£0.000	£0.000	£7.069	£0.339	£24.686	£2.221	£34.800
Marks & Spencer, Dolphin Square, Tring	£0.155	£0.134	£0.000	£0.000	£0.000	£0.000	£1.069	£0.232	£1.591
Tring Town Centre	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.282	£0.000	£0.282
Co-op, Silk Mill Way, Tring	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.376	£0.000	£0.376
Other food shops in Tring	£0.000	£0.000	£0.000	£0.000	£0.422	£0.000	£1.222	£0.116	£1.761
Tring - Total	£0.506	£0.269	£0.000	£0.000	£7.491	£0.339	£27.635	£2.569	£38.810
Others in Dacorum Borough									
Others in Dacorum Borough - Total	£0.975	£3.318	£0.000	£0.563	£1.239	£0.146	£0.253	£0.000	£6.493
Aylesbury Total	£0.506	£0.496	£0.000	£0.000	£0.310	£0.000	£4.766	£31.421	£37.499
Chesham Total	£0.155	£1.528	£0.000	£0.000	£0.422	£50.644	£0.852	£0.000	£53.602
St Albans/London Colney Total	£4.598	£1.394	£0.000	£5.445	£0.113	£0.146	£0.000	£0.282	£11.977
Amersham Total	£0.155	£0.992	£0.000	£0.000	£0.000	£6.887	£0.000	£0.282	£8.315
Watford Total	£1.946	£16.731	£0.789	£0.342	£0.422	£0.339	£0.347	£0.282	£21.198
Dunstable Total	£0.000	£0.000	£0.000	£4.872	£0.998	£0.000	£0.000	£0.000	£5.870
Harpenden Total	£0.155	£0.000	£0.000	£2.718	£0.000	£0.000	£0.000	£0.000	£2.873
Wendover Total	£0.000	£0.000	£0.000	£0.000	£0.310	£0.339	£0.000	£3.132	£3.781
Others Non Dacorum	£8.139	£11.443	£3.763	£2.626	£2.900	£3.689	£2.197	£6.352	£41.111
Non Dacorum Total	£15.655	£32.583	£4.553	£16.003	£5.475	£62.045	£8.162	£41.750	£186.225
Internet	*£0.836*	*£0.878*	*£1.274*	*£0.476*	*£0.793*	*£0.462*	*£0.410*	*£0.931*	*£6.060*

Notes:

Table 15 :	Combined Food Shopping Market Share Turnovers Summary £M					
	2009 £m	**2011** £m	**2016** £m	**2021** £m	**2026** £m	**2031** £m
Hemel Hempstead TC						
Asda at Hillfield Road, Hemel Hempstead town centre	£28.155	£29.106	£31.571	£34.167	£36.899	£39.773
Iceland at Hillfield Road, Hemel Hempstead	£0.673	£0.692	£0.742	£0.795	£0.850	£0.905
Marks & Spencer in The Marlowes Centre, Hemel Hempstead town	£6.414	£6.621	£7.159	£7.725	£8.320	£8.939
Other food shops in Hemel Hempstead town centre	£3.777	£3.895	£4.198	£4.517	£4.852	£5.201
Hemel Hempstead TC - Total	£39.019	£40.314	£43.670	£47.204	£50.921	£54.818
Hemel Hempstead Non Town Centre - Major Stores						
Tesco at Jarman Way, Hemel Hempstead	£53.073	£54.810	£59.255	£63.932	£68.852	£74.025
Sainsburys at Apsley, Hemel Hempstead	£44.140	£45.301	£48.379	£51.610	£55.000	£58.557
Sainsburys at Woodall Farm, Hemel Hempstead	£15.037	£15.517	£16.746	£18.039	£19.399	£20.828
Hemel Hempstead Non Town Centre - Major Stores - Total	£112.250	£115.628	£124.380	£133.580	£143.250	£153.409
Hemel Hempstead Non Town Centre - Others						
Hemel Hempstead Non Town Centre - Others - Total	£18.551	£19.172	£20.781	£22.476	£24.260	£26.132
Berkhamsted						
Waitrose in Berkhamsted town centre	£30.342	£30.959	£32.736	£34.600	£36.549	£38.571
Tesco in Berkhamsted town centre	£6.865	£6.993	£7.375	£7.773	£8.190	£8.626
Other food shops in Berkhamsted	£3.035	£3.091	£3.260	£3.436	£3.620	£3.812
Berkhamsted - Total	£40.242	£41.043	£43.371	£45.809	£48.359	£51.010
Tring						
Tesco, London Road, Tring	£28.078	£28.597	£30.048	£31.568	£33.156	£34.800
Marks & Spencer, Dolphin Square, Tring	£1.284	£1.308	£1.374	£1.443	£1.516	£1.591
Tring Town Centre	£0.229	£0.233	£0.244	£0.256	£0.269	£0.282
Co-op, Silk Mill Way, Tring	£0.305	£0.310	£0.326	£0.342	£0.359	£0.376
Other food shops in Tring	£1.422	£1.448	£1.521	£1.598	£1.678	£1.761
Tring - Total	£31.318	£31.897	£33.513	£35.207	£36.977	£38.810
Others in Dacorum Borough						
Apsley	£0.893	£0.916	£0.978	£1.042	£1.110	£1.181
Northchurch	£0.379	£0.388	£0.412	£0.438	£0.465	£0.493
Chipperfield	£0.343	£0.347	£0.360	£0.374	£0.388	£0.403
Kings Langley	£1.256	£1.271	£1.320	£1.371	£1.423	£1.478
Farm Shop, Tring	£0.205	£0.209	£0.219	£0.230	£0.241	£0.253
Markyate	£0.230	£0.234	£0.245	£0.257	£0.269	£0.282
Spar, High Street, Kings Langley	£0.114	£0.116	£0.120	£0.125	£0.129	£0.134
Bovingdon	£0.907	£0.920	£0.960	£1.002	£1.045	£1.087
Local Stores, Markyate	£0.057	£0.058	£0.061	£0.064	£0.067	£0.070
One Stop, High Street, Northchurch	£0.090	£0.091	£0.096	£0.101	£0.107	£0.113
Local stores, Potten End	£0.358	£0.365	£0.385	£0.406	£0.428	£0.450
Flamstead	£0.172	£0.175	£0.184	£0.193	£0.202	£0.211
Little Gaddesden	£0.269	£0.274	£0.289	£0.304	£0.321	£0.338
Others in Dacorum Borough - Total	£5.272	£5.364	£5.629	£5.906	£6.195	£6.493

Notes:

Table 16 : *Existing Food Shopping Provision & Benchmark Turnovers*

		Sales Floorspace	Proportion Convenience Sales	Conveneince Sales Area	Benchmark Convenience Goods Trading Density	Benchmark Convenience Goods Turnover 2009	Benchmark Convenience Goods Turnover 2011	Benchmark Convenience Goods Turnover 2016	Benchmark Convenience Goods Turnover 2021	Benchmark Convenience Goods Turnover 2026	Benchmark Convenience Goods Turnover 2031
		sqm	%	sqm	£/Sqm	£M	£M	£M	£M	£M	£M
Hemel Hempstead TC											
Asda at Hillfield Road, Hemel Hempstead town centre		1,974	75%	1,481	£13,760	£20.37	£20.474	£20.731	£20.991	£21.255	£21.522
Iceland at Hillfield Road, Hemel Hempstead		720	94%	677	£5,643	£3.82	£3.838	£3.887	£3.935	£3.985	£4.035
Marks & Spencer in The Marlowes Centre, Hemel Hempstead		984	92%	905	£10,105	£9.15	£9.194	£9.309	£9.426	£9.545	£9.664
Other food shops in Hemel Hempstead town centre		1,268	95%	1,205	£5,000	£6.02	£6.053	£6.129	£6.206	£6.284	£6.363
Hemel Hempstead TC - Total						£39.362	£39.559	£40.056	£40.559	£41.068	£41.584
Hemel Hempstead Non Town Centre - Major Stores											
Tesco at Jarman Way, Hemel Hempstead	*1*	4,361	64%	2,791	£13,501	£37.68	£37.870	£38.346	£38.828	£39.316	£39.810
Sainsburys at Apsley, Hemel Hempstead		4,637	74%	3,431	£11,518	£39.52	£39.720	£40.219	£40.725	£41.236	£41.754
Sainsburys at Woodall Farm, Hemel Hempstead		1,758	85%	1,494	£11,518	£17.21	£17.298	£17.515	£17.735	£17.958	£18.183
Hemel Hempstead Non Town Centre - Major Stores - Total						£94.416	£94.888	£96.081	£97.288	£98.510	£99.747
Hemel Hempstead Non Town Centre - Others											
Hemel Hempstead Non Town Centre - Others - Total						£17.824	£17.913	£18.138	£18.366	£18.597	£18.831
Berkhamsted											
Waitrose in Berkhamsted town centre		2,975	80%	2,380	£10,592	£25.21	£25.335	£25.653	£25.976	£26.302	£26.632
Tesco in Berkhamsted town centre		1,270	50%	635	£13,501	£8.57	£8.616	£8.724	£8.834	£8.945	£9.057
Other food shops in Berkhamsted		700	95%	665	£5,500	£3.66	£3.676	£3.722	£3.769	£3.816	£3.864
Berkhamsted - Total						£37.440	£37.627	£38.100	£38.578	£39.063	£39.554
Tring											
Tesco, London Road, Tring		1,624	85%	1,380	£13,501	£18.64	£18.730	£18.965	£19.204	£19.445	£19.689
Marks & Spencer, Dolphin Square, Tring		660	67%	442	£10,105	£4.47	£4.491	£4.547	£4.604	£4.662	£4.721
Tring Town Centre		598	95%	568	£5,500	£3.12	£3.140	£3.180	£3.220	£3.260	£3.301
Co-op, Silk Mill Way, Tring					*£5,655*	£0.30	£0.306	£0.310	£0.314	£0.318	£0.322
Other food shops in Tring						*£1.42*	*£1.429*	*£1.447*	*£1.466*	*£1.484*	*£1.503*
Tring - Total						£27.957	£28.097	£28.450	£28.807	£29.169	£29.536
Others in Dacorum Borough											
Others in Dacorum Borough - Total						£5.272	£5.298	£5.365	£5.432	£5.500	£5.569

Notes: Sources Dacorum Retail Study Update 2009 (DTZ), IGD, Dacorum BC, Mintel Retail Rankings, Verdict Grocery Retailing 2010.
Benchmark Turnover are company/business based estimates adjusted to a goods basis, 2009 in 2009 prices
Where centes/stores are usurveyed/floorpace unknown the implied 2009 turnover is adopted.
Benchmark convenience goods turnovers are grown from 2009 by 0.25~% per annum.
1 Excludes extension permission

Table 17 :	Food Shopping / Convenience Goods Capacity																		
		Implied /Market Share Turnover	Benchmark Convenience Goods Turnover 2009	Capacity	Implied /Market Share Turnover	Benchmark Convenience Goods Turnover 2011	Capacity	Implied /Market Share Turnover	Benchmark Convenience Goods Turnover 2016	Capacity	Implied /Market Share Turnover	Benchmark Convenience Goods Turnover 2021	Capacity	Implied /Market Share Turnover	Benchmark Convenience Goods Turnover 2026	Capacity	Implied /Market Share Turnover	Benchmark Convenience Goods Turnover 2031	Capacity
		£M	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M	£M
Hemel Hempstead TC																			
Asda at Hillfield Road, Hemel Hempstead town centre		£28.155	£20.372	£7.783	£29.106	£20.731	£8.375	£31.571	£20.731	£10.840	£34.167	£20.991	£13.176	£36.899	£21.255	£15.644	£39.773	£21.522	£18.251
Iceland at Hillfield Road, Hemel Hempstead		£0.673	£3.819	-£3.146	£0.692	£3.887	-£3.194	£0.742	£3.887	-£3.144	£0.795	£3.935	-£3.140	£0.850	£3.985	-£3.135	£0.905	£4.035	-£3.130
Marks & Spencer in The Marlowes Centre, Hemel Hempstead		£6.414	£9.148	-£2.733	£6.621	£9.309	-£2.688	£7.159	£9.309	-£2.150	£7.725	£9.426	-£1.701	£8.320	£9.545	-£1.224	£8.939	£9.664	-£0.725
Other food shops in Hemel Hempstead town centre		£3.777	£6.023	-£2.246	£3.895	£6.129	-£2.234	£4.198	£6.129	-£1.931	£4.517	£6.206	-£1.689	£4.852	£6.284	-£1.432	£5.201	£6.363	-£1.162
Hemel Hempstead TC - Total				**-£0.342**			**£0.258**			**£3.615**			**£6.645**			**£9.852**			**£13.234**
Hemel Hempstead Non Town Centre - Major Stores																			
Tesco at Jarman Way, Hemel Hempstead	*1*	£53.073	£37.682	£15.391	£54.810	£38.346	£16.464	£59.255	£38.346	£20.908	£63.932	£38.828	£25.104	£68.852	£39.316	£29.536	£74.025	£39.810	£34.215
Sainsburys at Apsley, Hemel Hempstead		£44.140	£39.523	£4.617	£45.301	£40.219	£5.081	£48.379	£40.219	£8.159	£51.610	£40.725	£10.885	£55.000	£41.236	£13.764	£58.557	£41.754	£16.802
Sainsburys at Woodall Farm, Hemel Hempstead		£15.037	£17.211	-£2.174	£15.517	£17.515	-£1.997	£16.746	£17.515	-£0.768	£18.039	£17.735	£0.304	£19.399	£17.958	£1.441	£20.828	£18.183	£2.644
Hemel Hempstead Non Town Centre - Major Stores - Total				**£17.834**			**£19.547**			**£28.299**			**£36.293**			**£44.740**			**£53.662**
Hemel Hempstead Non Town Centre - Others																			
Hemel Hempstead Non Town Centre - Others - Total				**£0.727**			**£1.034**			**£2.643**			**£4.110**			**£5.663**			**£7.301**
Berkhamsted																			
Waitrose in Berkhamsted town centre		£30.342	£25.209	£5.133	£30.959	£25.653	£5.305	£32.736	£25.653	£7.083	£34.600	£25.976	£8.625	£36.549	£26.302	£10.247	£38.571	£26.632	£11.938
Tesco in Berkhamsted town centre		£6.865	£8.573	-£1.708	£6.993	£8.724	-£1.731	£7.375	£8.724	-£1.350	£7.773	£8.834	-£1.060	£8.190	£8.945	-£0.754	£8.626	£9.057	-£0.431
Other food shops in Berkhamsted		£3.035	£3.658	-£0.623	£3.091	£3.722	-£0.631	£3.260	£3.722	-£0.462	£3.436	£3.769	-£0.333	£3.620	£3.816	-£0.196	£3.812	£3.864	-£0.052
Berkhamsted - Total				**£2.802**			**£2.943**			**£5.271**			**£7.231**			**£9.296**			**£11.456**
Tring																			
Tesco, London Road, Tring		£28.078	£18.637	£9.442	£28.597	£18.965	£9.632	£30.048	£18.965	£11.082	£31.568	£19.204	£12.365	£33.156	£19.445	£13.711	£34.800	£19.689	£15.111
Marks & Spencer, Dolphin Square, Tring		£1.284	£4.468	-£3.185	£1.308	£4.547	-£3.239	£1.374	£4.547	-£3.173	£1.443	£4.604	-£3.161	£1.516	£4.662	-£3.146	£1.591	£4.721	-£3.130
Tring Town Centre		£0.229	£3.125	-£2.896	£0.233	£3.180	-£2.947	£0.244	£3.180	-£2.935	£0.256	£3.220	-£2.963	£0.269	£3.260	-£2.991	£0.282	£3.301	-£3.019
Co-op, Silk Mill Way, Tring		£0.305	£0.305	£0.000	£0.310	£0.310	£0.000	£0.326	£0.310	£0.016	£0.342	£0.314	£0.028	£0.359	£0.318	£0.041	£0.376	£0.322	£0.054
Other food shops in Tring		£1.422	£1.422	£0.000	£1.448	£1.447	£0.001	£1.521	£1.447	£0.074	£1.598	£1.466	£0.132	£1.678	£1.484	£0.194	£1.761	£1.503	£0.258
Tring - Total				**£3.361**			**£3.447**			**£5.063**			**£6.400**			**£7.808**			**£9.274**
Others in Dacorum Borough																			
Others in Dacorum Borough - Total				**£0.000**			**-£0.001**			**£0.264**			**£0.474**			**£0.695**			**£0.924**

Notes: Capacity comprises overtrading and growth in conveneince expenditure
Calculation is the difference between implied turnover (Table 15 Summary) and benchmark turnover (Table 16).
Negative values denote undertrading/no capacity.

Table 18 : Dacorum Convenience Goods Capacity Summary

Turnover Capacity	Capacity 2009 £M	Capacity 2011 £M	Capacity 2016 £M	Capacity 2021 £M	Capacity 2026 £M	Capacity 2031 £M
Hemel Hempstead TC - Total	**£2.804**	**£3.452**	**£6.759**	**£9.786**	**£12.988**	**£16.364**
Hemel Hempstead Non Town Centre - Major Stores - Total	**£17.834**	**£19.547**	**£28.299**	**£36.293**	**£44.740**	**£53.662**
Hemel Hempstead Non Town Centre - Others - Total	**-£2.420**	**-£2.160**	**-£0.501**	**£0.970**	**£2.528**	**£4.171**
Berkhamsted - Total	**£2.802**	**£2.943**	**£5.271**	**£7.231**	**£9.296**	**£11.456**
Tring - Total	**£3.361**	**£3.447**	**£5.063**	**£6.400**	**£7.808**	**£9.274**
Others in Dacorum Borough - Total	**£0.000**	**-£0.001**	**£0.264**	**£0.474**	**£0.695**	**£0.924**

Capacity as Floorspace (Indicative)	2009 sqm	2011 sqm	2016 sqm	2021 sqm	2026 sqm	2031 sqm
Hemel Hempstead TC - Total	**224**	**276**	**541**	**783**	**1,039**	**1,309**
Hemel Hempstead Non Town Centre - Major Stores - Total	**1,427**	**1,564**	**2,264**	**2,903**	**3,579**	**4,293**
Hemel Hempstead Non Town Centre - Others - Total	**nil**	**nil**	**nil**	**78**	**202**	**334**
Berkhamsted - Total	**224**	**235**	**422**	**578**	**744**	**916**
Tring - Total	**269**	**276**	**405**	**512**	**625**	**742**
Others in Dacorum Borough - Total	**nil**	**nil**	**21**	**38**	**56**	**74**

Notes: From Table 17.
Capacity is converted to equivalent convenience goods sales floorspace using a trading density of 12500 per square meter

Table A : Expenditure Per Head - Comparison Goods

Zone	2009	2011	2016	2021	2026	2031
1	£2,961	£3,246	£4,084	£5,138	£6,464	£8,133
2	£3,227	£3,537	£4,451	£5,600	£7,045	£8,864
3	£2,888	£3,166	£3,983	£5,011	£6,305	£7,933
4	£3,225	£3,535	£4,448	£5,596	£7,041	£8,858
5	£3,330	£3,650	£4,593	£5,778	£7,270	£9,147
6	£3,025	£3,316	£4,172	£5,249	£6,604	£8,309
7	£3,338	£3,659	£4,604	£5,792	£7,288	£9,169
8	£3,429	£3,759	£4,729	£5,950	£7,486	£9,419

Notes: *2009 goods based consumer expenditure per head derived from Experian Business Strategies Retail Planner Reports for each zone*
Annual growth in expenditure of 4.7% year on year. Long term trend, Figure 2, Experian Retail Planner Briefing Note 8.1

Table B : Comparison Goods Expenditure Potential

Zone	2009	2011 net SFT	2016 net SFT	2021 net SFT	2026 net SFT	2031 net SFT
1	£180.032	£199.155	£255.699	£327.169	£417.201	£530.226
2	£99.263	£107.952	£133.028	£163.696	£201.127	£246.708
3	£67.088	£74.849	£98.006	£127.626	£165.352	£213.194
4	£31.553	£34.442	£42.827	£53.169	£65.897	£81.522
5	£79.577	£87.099	£109.028	£136.231	£169.895	£211.449
6	£74.823	£82.670	£106.081	£135.871	£172.798	£215.178
7	£58.191	£63.562	£79.171	£98.453	£122.216	£151.432
8	£63.334	£69.110	£85.487	£105.873	£130.996	£161.275
Total	£653.861	£718.839	£909.326	£1,148.088	£1,445.483	£1,810.984

Growth From 2011:	
to 2016	**£190.487**
to 2021	**£429.249**
to 2026	**£726.644**
to 2031	**£1,092.145**

SFT Adjustments:	
Amount at 2011	£7.279
Amount at 2016	£33.498
Amount at 2021	£75.466
Amount at 2026	£140.322
Amount at 2031	£237.576

Notes: *Product of Population and Expenditure Per Head*
2009 based estimates of consumer spending (2009 price base), Experian Retail Planner Reports 2010.
Annual growth in expenditure of 4.7% year on year. Long term trend, Figure 2, Experian Retail Planner Briefing Note 8.1
SFT/Internet share is deducted on a 2009 market share baseline with growth in that share taken for subsequent study years (2011 onwards at 0.5% per annum)

Table B1 : Comparison Goods Expenditure Potential - Clothing & Footwear 23.6%

Zone	2009	2011 net SFT	2016 net SFT	2021 net SFT	2026 net SFT	2031 net SFT
1	£42.55	£47.07	£60.44	£77.33	£98.61	£125.32
2	£23.46	£25.51	£31.44	£38.69	£47.54	£58.31
3	£15.86	£17.69	£23.16	£30.16	£39.08	£50.39
4	£7.46	£8.14	£10.12	£12.57	£15.57	£19.27
5	£18.81	£20.59	£25.77	£32.20	£40.16	£49.98
6	£17.68	£19.54	£25.07	£32.11	£40.84	£50.86
7	£13.75	£15.02	£18.71	£23.27	£28.89	£35.79
8	£14.97	£16.33	£20.21	£25.02	£30.96	£38.12
Total	£154.542	£169.900	£214.922	£271.354	£341.644	£428.031

Notes: Split based upon proportion of spending on comparison goods

Table B2 : Comparison Goods Expenditure Potential - Furniture, Furnishings & Carpets 9.7%

Zone	2009	2011 net SFT	2016 net SFT	2021 net SFT	2026 net SFT	2031 net SFT
1	£17.44	£19.29	£24.77	£31.70	£40.42	£51.37
2	£9.62	£10.46	£12.89	£15.86	£19.49	£23.90
3	£6.50	£7.25	£9.49	£12.36	£16.02	£20.65
4	£3.06	£3.34	£4.15	£5.15	£6.38	£7.90
5	£7.71	£8.44	£10.56	£13.20	£16.46	£20.49
6	£7.25	£8.01	£10.28	£13.16	£16.74	£20.85
7	£5.64	£6.16	£7.67	£9.54	£11.84	£14.67
8	£6.14	£6.70	£8.28	£10.26	£12.69	£15.62
Total	£63.346	£69.642	£88.096	£111.227	£140.039	£175.449

Notes: Split based upon proportion of spending on comparison goods

Table B3 : Comparison Goods Expenditure Potential - Household textiles 3.4%

Zone	2009	2011 net SFT	2016 net SFT	2021 net SFT	2026 net SFT	2031 net SFT
1	£6.16	£6.81	£8.74	£11.19	£14.27	£18.13
2	£3.39	£3.69	£4.55	£5.60	£6.88	£8.44
3	£2.29	£2.56	£3.35	£4.36	£5.65	£7.29
4	£1.08	£1.18	£1.46	£1.82	£2.25	£2.79
5	£2.72	£2.98	£3.73	£4.66	£5.81	£7.23
6	£2.56	£2.83	£3.63	£4.65	£5.91	£7.36
7	£1.99	£2.17	£2.71	£3.37	£4.18	£5.18
8	£2.17	£2.36	£2.92	£3.62	£4.48	£5.51
Total	£22.358	£24.579	£31.093	£39.257	£49.426	£61.923

Notes: Split based upon proportion of spending on comparison goods

Table B4 : Comparison Goods Expenditure Potential - Household Domestic Appliances etc 3.1%

Zone	2009	2011 net SFT	2016 net SFT	2021 net SFT	2026 net SFT	2031 net SFT
1	£5.51	£6.09	£7.82	£10.01	£12.76	£16.22
2	£3.04	£3.30	£4.07	£5.01	£6.15	£7.55
3	£2.05	£2.29	£3.00	£3.90	£5.06	£6.52
4	£0.97	£1.05	£1.31	£1.63	£2.02	£2.49
5	£2.43	£2.66	£3.34	£4.17	£5.20	£6.47
6	£2.29	£2.53	£3.25	£4.16	£5.29	£6.58
7	£1.78	£1.94	£2.42	£3.01	£3.74	£4.63
8	£1.94	£2.11	£2.62	£3.24	£4.01	£4.93
Total	£20.004	£21.992	£27.820	£35.124	£44.223	£55.405

Notes: Split based upon proportion of spending on comparison goods

Table B5 : Comparison Goods Expenditure Potential - Audio Visual, Computing etc 13.3%

Zone	2009	2011 net SFT	2016 net SFT	2021 net SFT	2026 net SFT	2031 net SFT
1	£24.03	£26.58	£34.13	£43.67	£55.69	£70.77
2	£13.25	£14.41	£17.76	£21.85	£26.85	£32.93
3	£8.95	£9.99	£13.08	£17.03	£22.07	£28.46
4	£4.21	£4.60	£5.72	£7.10	£8.80	£10.88
5	£10.62	£11.63	£14.55	£18.18	£22.68	£28.22
6	£9.99	£11.03	£14.16	£18.14	£23.06	£28.72
7	£7.77	£8.48	£10.57	£13.14	£16.31	£20.21
8	£8.45	£9.22	£11.41	£14.13	£17.48	£21.53
Total	£87.273	£95.946	£121.371	£153.239	£192.933	£241.718

Notes: Split based upon proportion of spending on comparison goods

Table B6 : Comparison Goods Expenditure Potential - DIY & Hardware etc 8.1%

Zone	2009	2011 net SFT	2016 net SFT	2021 net SFT	2026 net SFT	2031 net SFT
1	£14.63	£16.19	£20.78	£26.59	£33.91	£43.10
2	£8.07	£8.77	£10.81	£13.31	£16.35	£20.05
3	£5.45	£6.08	£7.97	£10.37	£13.44	£17.33
4	£2.56	£2.80	£3.48	£4.32	£5.36	£6.63
5	£6.47	£7.08	£8.86	£11.07	£13.81	£17.19
6	£6.08	£6.72	£8.62	£11.04	£14.05	£17.49
7	£4.73	£5.17	£6.44	£8.00	£9.93	£12.31
8	£5.15	£5.62	£6.95	£8.61	£10.65	£13.11
Total	£53.148	£58.430	£73.913	£93.321	£117.494	£147.204

Notes: Split based upon proportion of spending on comparison goods

Table B7 : Comparison Goods Expenditure Potential - Chemist, Health & Beauty etc 12.7%

Zone	2009	2011 net SFT	2016 net SFT	2021 net SFT	2026 net SFT	2031 net SFT
1	£22.90	£25.33	£32.52	£41.61	£53.06	£67.43
2	£12.62	£13.73	£16.92	£20.82	£25.58	£31.37
3	£8.53	£9.52	£12.46	£16.23	£21.03	£27.11
4	£4.01	£4.38	£5.45	£6.76	£8.38	£10.37
5	£10.12	£11.08	£13.87	£17.33	£21.61	£26.89
6	£9.52	£10.51	£13.49	£17.28	£21.98	£27.37
7	£7.40	£8.08	£10.07	£12.52	£15.54	£19.26
8	£8.05	£8.79	£10.87	£13.46	£16.66	£20.51
Total	£83.155	£91.418	£115.643	£146.008	£183.829	£230.311

Notes: Split based upon proportion of spending on comparison goods

Table B8 : Comparison Goods Expenditure Potential - Recreation & Leisure 26.0%

Zone	2009	2011 net SFT	2016 net SFT	2021 net SFT	2026 net SFT	2031 net SFT
1	£46.82	£51.79	£66.49	£85.08	£108.49	£137.88
2	£25.81	£28.07	£34.59	£42.57	£52.30	£64.16
3	£17.45	£19.46	£25.49	£33.19	£43.00	£55.44
4	£8.21	£8.96	£11.14	£13.83	£17.14	£21.20
5	£20.69	£22.65	£28.35	£35.43	£44.18	£54.99
6	£19.46	£21.50	£27.59	£35.33	£44.94	£55.96
7	£15.13	£16.53	£20.59	£25.60	£31.78	£39.38
8	£16.47	£17.97	£22.23	£27.53	£34.07	£41.94
Total	£170.035	£186.933	£236.468	£298.558	£375.895	£470.943

Notes: Split based upon proportion of spending on comparison goods

Table C1 :	Comparison GoodsMarket Share			Clothing and Footwear					
Zone / Centre	Z1 %	Z2 %	Z3 %	Z4 %	Z5 %	Z6 %	Z7 %	Z8 %	Total %
Hemel Hempstead TC	52.26%	20.14%	60.00%	18.37%	31.65%	34.72%	21.95%	5.00%	34.25%
Hemel Hempstead Retail Warehouses & Major Foodstores	4.53%	1.39%	3.45%	0.00%	0.72%	0.69%	0.81%	0.00%	1.92%
Berkhamsted	0.00%	1.39%	1.38%	0.00%	10.79%	0.69%	0.81%	1.67%	1.92%
Tring	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	4.88%	0.00%	0.50%
Main Outflows									
Watford Town Centre	25.78%	56.25%	19.31%	9.18%	23.02%	24.31%	10.57%	10.83%	23.75%
Aylesbury Town Centre	0.35%	0.00%	0.69%	0.00%	2.88%	6.25%	39.84%	54.17%	10.75%
St Albans Town Centre	2.79%	2.08%	2.07%	27.55%	0.72%	0.00%	1.63%	0.00%	3.67%
Milton Keynes Town Centre	1.39%	0.69%	0.69%	5.10%	3.60%	0.00%	3.25%	7.50%	2.42%
Chesham Town Centre	0.35%	0.00%	0.00%	0.00%	0.72%	14.58%	0.00%	0.00%	1.92%
London	2.09%	3.47%	2.07%	2.04%	4.32%	4.17%	2.44%	1.67%	2.75%
Internet/Mail Order	5.57%	4.17%	6.90%	11.22%	12.23%	9.03%	9.76%	7.50%	7.83%

Table C2 :	Comparison GoodsMarket Share			furniture, carpets and other floor coverings					
Zone / Centre	Z1 %	Z2 %	Z3 %	Z4 %	Z5 %	Z6 %	Z7 %	Z8 %	Total %
Hemel Hempstead TC	16.52%	8.77%	26.73%	5.33%	12.61%	11.82%	7.29%	0.00%	12.08%
Hemel Hempstead Retail Warehouses & Major Foodstores	22.77%	11.40%	15.84%	5.33%	9.91%	8.18%	1.04%	1.04%	11.43%
Berkhamsted	0.45%	0.00%	0.99%	0.00%	13.51%	0.00%	0.00%	1.04%	1.94%
Tring	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	5.21%	0.00%	0.54%
Main Outflows									
Watford Town Centre	37.50%	52.63%	34.65%	12.00%	27.03%	22.73%	13.54%	4.17%	28.05%
Aylesbury Town Centre	0.89%	0.88%	1.98%	1.33%	4.50%	8.18%	34.38%	40.63%	9.92%
Chesham Town Centre	0.00%	0.88%	0.00%	0.00%	0.00%	20.00%	0.00%	0.00%	2.48%
High Wycombe Town Centre	0.00%	0.00%	0.00%	0.00%	1.80%	6.36%	4.17%	7.29%	2.16%
London	0.89%	0.88%	0.00%	2.67%	7.21%	0.91%	0.00%	1.04%	1.62%
Internet/Mail Order	7.59%	7.89%	6.93%	9.33%	7.21%	3.64%	4.17%	5.21%	6.58%

Table C3 :	Comparison GoodsMarket Share			household textiles and soft furnishings, including bedding					
Zone / Centre	Z1	Z2	Z3	Z4	Z5	Z6	Z7	Z8	Total
	%	%	%	%	%	%	%	%	%
Hemel Hempstead TC	32.58%	10.24%	43.61%	7.61%	19.69%	14.84%	15.74%	3.57%	20.99%
Hemel Hempstead Retail Warehouses & Major Foodstores	28.03%	19.69%	21.80%	3.26%	11.81%	7.81%	4.63%	1.79%	14.94%
Berkhamsted	0.38%	0.00%	0.00%	0.00%	11.02%	0.00%	0.93%	1.79%	1.65%
Tring	0.38%	0.00%	0.00%	0.00%	0.00%	0.78%	3.70%	0.00%	0.55%
Main Outflows									
Watford Town Centre	22.73%	47.24%	24.06%	8.70%	31.50%	19.53%	14.81%	5.36%	22.64%
Aylesbury Town Centre	0.76%	0.79%	1.50%	0.00%	0.00%	3.13%	26.85%	44.64%	8.07%
High Wycombe Town Centre	0.00%	0.79%	0.00%	0.00%	1.57%	11.72%	4.63%	7.14%	2.84%
Milton Keynes Town Centre	0.76%	0.00%	1.50%	3.26%	3.94%	0.00%	8.33%	8.93%	2.84%
Chesham Town Centre	0.00%	0.00%	0.00%	0.00%	0.00%	17.97%	0.00%	0.00%	2.11%
St Albans Town Centre	0.00%	2.36%	0.00%	15.22%	0.79%	0.00%	0.93%	0.00%	1.74%
Internet/Mail Order	7.20%	5.51%	3.76%	6.52%	7.09%	7.81%	6.48%	3.57%	6.14%

Table C4 :	Comparison GoodsMarket Share			household appliances					
Zone / Centre	Z1	Z2	Z3	Z4	Z5	Z6	Z7	Z8	Total
	%	%	%	%	%	%	%	%	%
Hemel Hempstead TC	21.58%	8.70%	31.16%	3.23%	22.73%	11.59%	7.69%	0.00%	15.12%
Hemel Hempstead Retail Warehouses & Major Foodstores	50.36%	32.61%	44.93%	10.75%	25.00%	10.87%	8.55%	0.00%	27.53%
Berkhamsted	0.00%	0.00%	0.00%	0.00%	3.03%	0.00%	0.00%	0.00%	0.35%
Tring	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	15.38%	0.91%	1.66%
Main Outflows									
Watford Town Centre	15.47%	30.43%	7.25%	7.53%	18.18%	8.70%	10.26%	3.64%	13.46%
Aylesbury Town Centre	0.36%	0.00%	0.72%	0.00%	1.52%	2.17%	25.64%	48.18%	7.87%
Chesham Town Centre	0.00%	1.45%	0.00%	0.00%	0.76%	44.20%	1.71%	0.91%	5.86%
Milton Keynes Town Centre	0.36%	0.00%	0.00%	2.15%	4.55%	0.00%	4.27%	5.45%	1.75%
High Wycombe Town Centre	0.00%	0.00%	0.00%	0.00%	2.27%	2.90%	1.71%	6.36%	1.40%
Welwyn Garden City Town Centre	0.36%	0.72%	0.00%	11.83%	0.00%	0.00%	0.00%	0.00%	1.14%
Internet/Mail Order	8.63%	8.70%	8.70%	15.05%	8.33%	5.80%	11.97%	8.18%	9.09%

Table C5 :	Comparison GoodsMarket Share			Audio Visual etc					
Zone / Centre	Z1	Z2	Z3	Z4	Z5	Z6	Z7	Z8	Total
	%	%	%	%	%	%	%	%	%
Hemel Hempstead TC	19.70%	8.82%	28.57%	2.30%	25.19%	15.38%	6.19%	0.00%	14.85%
Hemel Hempstead Retail Warehouses & Major Foodstores	44.98%	30.88%	39.85%	9.20%	20.61%	8.46%	7.96%	0.89%	24.48%
Berkhamsted	0.00%	0.00%	0.00%	0.00%	1.53%	0.00%	0.00%	0.00%	0.18%
Tring	0.00%	0.00%	0.00%	0.00%	0.76%	0.00%	21.24%	3.57%	2.61%
Main Outflows									
Watford Town Centre	16.36%	35.29%	12.78%	6.90%	21.37%	12.31%	8.85%	1.79%	15.39%
Aylesbury Town Centre	0.37%	0.00%	0.75%	0.00%	2.29%	3.08%	21.24%	53.57%	8.37%
Chesham Town Centre	0.00%	0.74%	0.00%	0.00%	0.00%	29.23%	0.88%	0.00%	3.60%
High Wycombe Town Centre	0.00%	0.00%	0.00%	0.00%	2.29%	7.69%	0.00%	6.25%	1.80%
St Albans Town Centre	0.37%	0.00%	1.50%	13.79%	0.00%	0.77%	0.00%	0.00%	1.44%
Milton Keynes Town Centre	0.00%	0.00%	0.00%	2.30%	3.05%	0.00%	4.42%	3.57%	1.35%
Welwyn Garden City Town Centre	0.37%	1.47%	0.00%	11.49%	0.00%	0.00%	0.00%	0.00%	1.17%
Internet/Mail Order	11.15%	8.82%	7.52%	13.79%	11.45%	6.92%	15.04%	11.61%	10.62%

Table C6 :	Comparison GoodsMarket Share				hardware, DIY goods, decorating supplies and garden products				
Zone / Centre	Z1 %	Z2 %	Z3 %	Z4 %	Z5 %	Z6 %	Z7 %	Z8 %	Total %
Hemel Hempstead TC	38.06%	21.37%	44.53%	5.75%	26.12%	10.53%	7.02%	0.00%	22.71%
Hemel Hempstead Retail Warehouses & Major Foodstores	54.48%	37.40%	50.36%	9.20%	29.10%	8.27%	10.53%	0.00%	29.98%
Berkhamsted	0.37%	0.76%	0.73%	0.00%	29.85%	0.00%	3.51%	0.91%	4.31%
Tring	0.00%	0.00%	0.00%	0.00%	1.49%	0.75%	26.32%	0.91%	3.05%
Main Outflows									
Aylesbury Town Centre	1.12%	0.76%	0.00%	0.00%	0.75%	1.50%	34.21%	68.18%	10.86%
Chesham Town Centre	0.00%	0.00%	0.00%	0.00%	1.49%	60.90%	1.75%	0.00%	7.63%
Watford Town Centre	1.49%	19.85%	2.19%	3.45%	2.24%	5.26%	0.88%	0.91%	4.31%
Internet/Mail Order	0.37%	3.05%	1.46%	1.15%	2.24%	0.75%	0.88%	0.91%	1.26%

Table C7 :	Comparison GoodsMarket Share			chemist, medical goods, cosmetics and other beauty products					
Zone / Centre	Z1	Z2	Z3	Z4	Z5	Z6	Z7	Z8	Total
	%	%	%	%	%	%	%	%	%
Hemel Hempstead TC	67.47%	16.67%	75.51%	6.25%	4.08%	2.03%	8.26%	0.00%	29.07%
Hemel Hempstead Retail Warehouses & Major Foodstores	14.73%	6.25%	5.44%	4.17%	0.00%	0.00%	0.00%	0.00%	5.21%
Berkhamsted	1.03%	1.39%	4.76%	0.00%	87.76%	0.68%	6.61%	1.61%	12.38%
Tring	0.34%	0.00%	0.00%	0.00%	0.68%	0.00%	61.98%	0.81%	6.35%
Others In Dacorum	9.93%	20.14%	7.48%	7.29%	0.00%	0.68%	0.00%	0.00%	6.27%
Main Outflows									
Chesham Town Centre	0.00%	2.08%	0.00%	0.00%	0.68%	87.84%	2.48%	0.00%	11.16%
Aylesbury Town Centre	0.00%	0.69%	0.68%	1.04%	0.00%	0.00%	15.70%	66.13%	8.47%
Watford Town Centre	2.05%	19.44%	1.36%	3.13%	0.00%	0.68%	0.83%	0.81%	3.42%
St Albans Town Centre	1.03%	0.69%	0.00%	26.04%	0.00%	0.00%	0.00%	0.00%	2.36%
Abbots Langley	0.00%	24.31%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.85%
Wendover	0.00%	0.00%	0.00%	0.00%	0.00%	0.68%	0.00%	13.71%	1.47%
Internet/Mail Order	2.40%	1.39%	2.72%	0.00%	0.68%	0.68%	0.83%	0.81%	1.38%

Table C8 :	Comparison GoodsMarket Share				jewellery, china, glassware, recreational and luxury goods				
Zone / Centre	Z1	Z2	Z3	Z4	Z5	Z6	Z7	Z8	Total
	%	%	%	%	%	%	%	%	%
Hemel Hempstead TC	56.85%	18.58%	62.02%	14.10%	8.94%	16.15%	13.40%	2.11%	29.42%
Hemel Hempstead Retail Warehouses & Major Foodstores	5.39%	2.65%	6.20%	3.85%	0.81%	1.54%	2.06%	0.00%	3.18%
Berkhamsted	0.41%	1.77%	3.88%	0.00%	47.97%	0.77%	9.28%	0.00%	7.65%
Tring	0.41%	0.00%	0.00%	0.00%	0.00%	0.00%	19.59%	0.00%	1.99%
Main Outflows									
Watford Town Centre	17.84%	53.98%	13.18%	7.69%	17.07%	12.31%	9.28%	5.26%	17.69%
Aylesbury Town Centre	0.00%	0.88%	0.78%	0.00%	2.44%	3.08%	26.80%	56.84%	8.85%
Chesham Town Centre	0.00%	0.88%	0.00%	0.00%	0.00%	43.85%	0.00%	0.00%	5.77%
St Albans Town Centre	1.66%	0.88%	0.78%	29.49%	0.00%	0.00%	0.00%	0.00%	2.88%
Milton Keynes Town Centre	1.24%	0.88%	0.78%	2.56%	1.63%	0.00%	4.12%	8.42%	2.09%
London	0.83%	5.31%	0.78%	0.00%	4.07%	2.31%	0.00%	0.00%	1.69%
Internet/Mail Order	9.13%	5.31%	9.30%	7.69%	8.13%	8.46%	12.37%	14.74%	9.24%

Table D1 :	Comparison GoodsMarket Share				Clothing and Footwear				
Zone / Centre	Z1 £m	Z2 £m	Z3 £m	Z4 £m	Z5 £m	Z6 £m	Z7 £m	Z8 £m	Total £m
Hemel Hempstead TC	£22.239	£4.725	£9.514	£1.370	£5.954	£6.141	£3.019	£0.748	£53.709
Hemel Hempstead Retail Warehouses & Major Foodstores	£1.927	£0.326	£0.547	£0.000	£0.135	£0.123	£0.112	£0.000	£3.170
Berkhamsted	£0.000	£0.326	£0.219	£0.000	£2.030	£0.123	£0.112	£0.249	£3.058
Tring	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.671	£0.000	£0.671
Main Outflows									
Watford Town Centre	£10.971	£13.197	£3.062	£0.685	£4.330	£4.298	£1.454	£1.622	£39.619
Aylesbury Town Centre	£0.148	£0.000	£0.109	£0.000	£0.541	£1.105	£5.479	£8.108	£15.492
St Albans Town Centre	£1.186	£0.489	£0.328	£2.055	£0.135	£0.000	£0.224	£0.000	£4.417
Milton Keynes Town Centre	£0.593	£0.163	£0.109	£0.380	£0.677	£0.000	£0.447	£1.123	£3.492
Chesham Town Centre	£0.148	£0.000	£0.000	£0.000	£0.135	£2.579	£0.000	£0.000	£2.863
London	£0.890	£0.815	£0.328	£0.152	£0.812	£0.737	£0.335	£0.249	£4.318
Internet/Mail Order	£2.372	£0.978	£1.094	£0.837	£2.300	£1.597	£1.342	£1.123	£11.642

Table D2 :	Comparison GoodsMarket Share			furniture, carpets and other floor coverings					
Zone / Centre	Z1 £m	Z2 £m	Z3 £m	Z4 £m	Z5 £m	Z6 £m	Z7 £m	Z8 £m	Total £m
Hemel Hempstead TC	£2.881	£0.844	£1.738	£0.163	£0.972	£0.857	£0.411	£0.000	£7.865
Hemel Hempstead Retail Warehouses & Major Foodstores	£3.971	£1.097	£1.030	£0.163	£0.764	£0.593	£0.059	£0.064	£7.740
Berkhamsted	£0.078	£0.000	£0.064	£0.000	£1.042	£0.000	£0.000	£0.064	£1.248
Tring	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.294	£0.000	£0.294
Main Outflows									
Watford Town Centre	£6.541	£5.061	£2.252	£0.367	£2.084	£1.647	£0.763	£0.256	£18.971
Aylesbury Town Centre	£0.156	£0.084	£0.129	£0.041	£0.347	£0.593	£1.938	£2.493	£5.781
Chesham Town Centre	£0.000	£0.084	£0.000	£0.000	£0.000	£1.450	£0.000	£0.000	£1.534
High Wycombe Town Centre	£0.000	£0.000	£0.000	£0.000	£0.139	£0.461	£0.235	£0.447	£1.283
London	£0.156	£0.084	£0.000	£0.082	£0.556	£0.066	£0.000	£0.064	£1.007
Internet/Mail Order	£1.324	£0.759	£0.450	£0.285	£0.556	£0.264	£0.235	£0.320	£4.192

Table D3 :	Comparison GoodsMarket Share			household textiles and soft furnishings, including bedding					
Zone / Centre	Z1 £m	Z2 £m	Z3 £m	Z4 £m	Z5 £m	Z6 £m	Z7 £m	Z8 £m	Total £m
Hemel Hempstead TC	£2.005	£0.347	£1.000	£0.082	£0.536	£0.380	£0.313	£0.077	£4.741
Hemel Hempstead Retail Warehouses & Major Foodstores	£1.726	£0.668	£0.500	£0.035	£0.321	£0.200	£0.092	£0.039	£3.581
Berkhamsted	£0.023	£0.000	£0.000	£0.000	£0.300	£0.000	£0.018	£0.039	£0.380
Tring	£0.023	£0.000	£0.000	£0.000	£0.000	£0.020	£0.074	£0.000	£0.117
Main Outflows									
Watford Town Centre	£1.399	£1.604	£0.552	£0.094	£0.857	£0.500	£0.295	£0.116	£5.416
Aylesbury Town Centre	£0.047	£0.027	£0.034	£0.000	£0.000	£0.080	£0.534	£0.967	£1.689
High Wycombe Town Centre	£0.000	£0.027	£0.000	£0.000	£0.043	£0.300	£0.092	£0.155	£0.616
Milton Keynes Town Centre	£0.047	£0.000	£0.034	£0.035	£0.107	£0.000	£0.166	£0.193	£0.583
Chesham Town Centre	£0.000	£0.000	£0.000	£0.000	£0.000	£0.460	£0.000	£0.000	£0.460
St Albans Town Centre	£0.000	£0.080	£0.000	£0.164	£0.021	£0.000	£0.018	£0.000	£0.284
Internet/Mail Order	£0.443	£0.187	£0.086	£0.070	£0.193	£0.200	£0.129	£0.077	£1.386

Table D4 :	Comparison GoodsMarket Share			household appliances					
Zone / Centre	Z1 £m	Z2 £m	Z3 £m	Z4 £m	Z5 £m	Z6 £m	Z7 £m	Z8 £m	Total £m
Hemel Hempstead TC	£1.189	£0.264	£0.640	£0.031	£0.553	£0.265	£0.137	£0.000	£3.079
Hemel Hempstead Retail Warehouses & Major Foodstores	£2.774	£0.990	£0.922	£0.104	£0.609	£0.249	£0.152	£0.000	£5.800
Berkhamsted	£0.000	£0.000	£0.000	£0.000	£0.074	£0.000	£0.000	£0.000	£0.074
Tring	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.274	£0.018	£0.292
Main Outflows									
Watford Town Centre	£0.852	£0.924	£0.149	£0.073	£0.443	£0.199	£0.183	£0.070	£2.892
Aylesbury Town Centre	£0.020	£0.000	£0.015	£0.000	£0.037	£0.050	£0.456	£0.934	£1.511
Chesham Town Centre	£0.000	£0.044	£0.000	£0.000	£0.018	£1.012	£0.030	£0.018	£1.122
Milton Keynes Town Centre	£0.020	£0.000	£0.000	£0.021	£0.111	£0.000	£0.076	£0.106	£0.333
High Wycombe Town Centre	£0.000	£0.000	£0.000	£0.000	£0.055	£0.066	£0.030	£0.123	£0.275
Welwyn Garden City Town Centre	£0.020	£0.022	£0.000	£0.114	£0.000	£0.000	£0.000	£0.000	£0.156
Internet/Mail Order	£0.475	£0.264	£0.178	£0.145	£0.203	£0.133	£0.213	£0.159	£1.771

Table D5 :	Comparison GoodsMarket Share				Audio Visual etc				
Zone / Centre	Z1 £m	Z2 £m	Z3 £m	Z4 £m	Z5 £m	Z6 £m	Z7 £m	Z8 £m	Total £m
Hemel Hempstead TC	£4.734	£1.169	£2.558	£0.097	£2.676	£1.536	£0.481	£0.000	£13.252
Hemel Hempstead Retail Warehouses & Major Foodstores	£10.809	£4.092	£3.568	£0.387	£2.189	£0.845	£0.619	£0.075	£22.584
Berkhamsted	£0.000	£0.000	£0.000	£0.000	£0.162	£0.000	£0.000	£0.000	£0.162
Tring	£0.000	£0.000	£0.000	£0.000	£0.081	£0.000	£1.650	£0.302	£2.033
Main Outflows									
Watford Town Centre	£3.930	£4.676	£1.145	£0.290	£2.270	£1.229	£0.687	£0.151	£14.379
Aylesbury Town Centre	£0.089	£0.000	£0.067	£0.000	£0.243	£0.307	£1.650	£4.529	£6.885
Chesham Town Centre	£0.000	£0.097	£0.000	£0.000	£0.000	£2.919	£0.069	£0.000	£3.085
High Wycombe Town Centre	£0.000	£0.000	£0.000	£0.000	£0.243	£0.768	£0.000	£0.528	£1.540
St Albans Town Centre	£0.089	£0.000	£0.135	£0.581	£0.000	£0.077	£0.000	£0.000	£0.882
Milton Keynes Town Centre	£0.000	£0.000	£0.000	£0.097	£0.324	£0.000	£0.344	£0.302	£1.067
Welwyn Garden City Town Centre	£0.089	£0.195	£0.000	£0.484	£0.000	£0.000	£0.000	£0.000	£0.768
Internet/Mail Order	£2.680	£1.169	£0.673	£0.581	£1.216	£0.691	£1.168	£0.981	£9.160

Table D6 :	Comparison GoodsMarket Share				hardware, DIY goods, decorating supplies and garden products				
Zone / Centre	Z1 £m	Z2 £m	Z3 £m	Z4 £m	Z5 £m	Z6 £m	Z7 £m	Z8 £m	Total £m
Hemel Hempstead TC	£5.570	£1.725	£2.428	£0.147	£1.689	£0.640	£0.332	£0.000	£12.531
Hemel Hempstead Retail Warehouses & Major Foodstores	£7.972	£3.018	£2.746	£0.236	£1.883	£0.503	£0.498	£0.000	£16.856
Berkhamsted	£0.055	£0.062	£0.040	£0.000	£1.931	£0.000	£0.166	£0.047	£2.300
Tring	£0.000	£0.000	£0.000	£0.000	£0.097	£0.046	£1.245	£0.047	£1.434
Main Outflows									
Aylesbury Town Centre	£0.164	£0.062	£0.000	£0.000	£0.048	£0.091	£1.618	£3.510	£5.493
Chesham Town Centre	£0.000	£0.000	£0.000	£0.000	£0.097	£3.704	£0.083	£0.000	£3.884
Watford Town Centre	£0.218	£1.601	£0.119	£0.088	£0.145	£0.320	£0.041	£0.047	£2.581
Internet/Mail Order	£0.055	£0.246	£0.080	£0.029	£0.145	£0.046	£0.041	£0.047	£0.689

Table D7 :	Comparison GoodsMarket Share			chemist, medical goods, cosmetics and other beauty products					
Zone / Centre	Z1 £m	Z2 £m	Z3 £m	Z4 £m	Z5 £m	Z6 £m	Z7 £m	Z8 £m	Total £m
Hemel Hempstead TC	£15.447	£2.104	£6.442	£0.251	£0.413	£0.193	£0.612	£0.000	£25.461
Hemel Hempstead Retail Warehouses & Major Foodstores	£3.372	£0.789	£0.464	£0.167	£0.000	£0.000	£0.000	£0.000	£4.792
Berkhamsted	£0.235	£0.175	£0.406	£0.000	£8.881	£0.064	£0.489	£0.130	£10.381
Tring	£0.078	£0.000	£0.000	£0.000	£0.069	£0.000	£4.587	£0.065	£4.799
Others In Dacorum	£2.274	£2.542	£0.638	£0.293	£0.000	£0.064	£0.000	£0.000	£5.811
Main Outflows									
Chesham Town Centre	£0.000	£0.263	£0.000	£0.000	£0.069	£8.358	£0.183	£0.000	£8.874
Aylesbury Town Centre	£0.000	£0.088	£0.058	£0.042	£0.000	£0.000	£1.162	£5.326	£6.676
Watford Town Centre	£0.470	£2.455	£0.116	£0.125	£0.000	£0.064	£0.061	£0.065	£3.357
St Albans Town Centre	£0.235	£0.088	£0.000	£1.045	£0.000	£0.000	£0.000	£0.000	£1.368
Abbots Langley	£0.000	£3.068	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£3.068
Wendover	£0.000	£0.000	£0.000	£0.000	£0.000	£0.064	£0.000	£1.104	£1.169
Internet/Mail Order	£0.549	£0.175	£0.232	£0.000	£0.069	£0.064	£0.061	£0.065	£1.216

Table D8 :	Comparison GoodsMarket Share				jewellery, china, glassware, recreational and luxury goods				
Zone / Centre	Z1 £m	Z2 £m	Z3 £m	Z4 £m	Z5 £m	Z6 £m	Z7 £m	Z8 £m	Total £m
Hemel Hempstead TC	£26.614	£4.797	£10.819	£1.157	£1.851	£3.143	£2.028	£0.347	£50.756
Hemel Hempstead Retail Warehouses & Major Foodstores	£2.525	£0.685	£1.082	£0.316	£0.168	£0.299	£0.312	£0.000	£5.388
Berkhamsted	£0.194	£0.457	£0.676	£0.000	£9.926	£0.150	£1.404	£0.000	£12.807
Tring	£0.194	£0.000	£0.000	£0.000	£0.000	£0.000	£2.964	£0.000	£3.158
Main Outflows									
Watford Town Centre	£8.353	£13.934	£2.299	£0.631	£3.533	£2.395	£1.404	£0.867	£33.417
Aylesbury Town Centre	£0.000	£0.228	£0.135	£0.000	£0.505	£0.599	£4.056	£9.362	£14.885
Chesham Town Centre	£0.000	£0.228	£0.000	£0.000	£0.000	£8.531	£0.000	£0.000	£8.760
St Albans Town Centre	£0.777	£0.228	£0.135	£2.420	£0.000	£0.000	£0.000	£0.000	£3.560
Milton Keynes Town Centre	£0.583	£0.228	£0.135	£0.210	£0.336	£0.000	£0.624	£1.387	£3.504
London	£0.389	£1.371	£0.135	£0.000	£0.841	£0.449	£0.000	£0.000	£3.185
Internet/Mail Order	£4.274	£1.371	£1.623	£0.631	£1.682	£1.646	£1.872	£2.427	£15.526

Table E1 :	Comparison Goods Market Share				Combined %				
Zone / Centre	Z1 %	Z2 %	Z3 %	Z4 %	Z5 %	Z6 %	Z7 %	Z8 %	Total %
Hemel Hempstead TC	44.8%	16.1%	52.4%	10.5%	18.4%	17.6%	12.6%	1.9%	26.2%
Hemel Hempstead Retail Warehouses & Major Foodstores	19.5%	11.8%	16.2%	4.5%	7.6%	3.8%	3.2%	0.3%	10.7%
Berkhamsted	0.3%	1.0%	2.1%	0.0%	30.6%	0.5%	3.8%	0.8%	4.7%
Tring	0.2%	0.0%	0.0%	0.0%	0.3%	0.1%	20.2%	0.7%	2.0%
Internet/Mail Order	6.8%	5.2%	6.6%	8.2%	8.0%	6.2%	8.7%	8.2%	7.0%

Table E2 :	Comparison GoodsMarket Share				Combined Total Implied Turnover				2009
Zone / Centre	Z1 £m	Z2 £m	Z3 £m	Z4 £m	Z5 £m	Z6 £m	Z7 £m	Z8 £m	Total £m
Hemel Hempstead TC	£80.679	£15.974	£35.140	£3.298	£14.644	£13.155	£7.333	£1.173	£171.395
Hemel Hempstead Retail Warehouses & Major Foodstores	£35.076	£11.665	£10.860	£1.408	£6.069	£2.812	£1.843	£0.178	£69.911
Berkhamsted	£0.585	£1.020	£1.405	£0.000	£24.345	£0.337	£2.190	£0.529	£30.411
Tring	£0.296	£0.000	£0.000	£0.000	£0.246	£0.066	£11.758	£0.431	£12.797
Internet/Mail Order	£12.171	£5.149	£4.417	£2.580	£6.364	£4.641	£5.062	£5.198	£45.582

Table F :	Comparison Goods Market Share Turnover By Study Year			Combined	Total Implied Turnover
	2009	2011	2016	2021	2026	2031

	2009	2011	2016	2021	2026	2031
Hemel Hempstead TC	£171.395	£188.428	£238.360	£300.946	£378.902	£474.710
Hemel Hempstead Retail Warehouses & Major Foodstores	£69.911	£76.858	£97.225	£122.753	£154.551	£193.630
Berkhamsted	£30.411	£33.433	£42.292	£53.397	£67.229	£84.228
Tring	£12.797	£14.069	£17.797	£22.470	£28.290	£35.444

Table G : *Existing Comparison Goods Shopping Provision & Benchmark Turnovers*

		Sales Floorspace	Proportion Comparison Goods Sales	Comparison Goods Sales Area	Benchmark Trading Density	Benchmark Comparison Goods Turnover 2009	Benchmark Comparison Goods Turnover 2011	Benchmark Comparison Goods Turnover 2016	Benchmark Comparison Goods Turnover 2021	Benchmark Comparison Goods Turnover 2026	Benchmark Comparison Goods Turnover 2031
		sqm	%	sqm	£/Sqm	£M	£M	£M	£M	£M	£M
Hemel Hempstead TC		40,184	100%	40,184	£5,000	£200.92	£206.993	£222.990	£240.224	£258.789	£278.789
Hemel Hempstead Retail Warehouses & Major Foodstores						£75.42	£77.70	£83.70	£90.17	£97.14	£104.65
Comet Apsley Mills		1,764	100%	1,764	£6,200	£10.94	£11.267	£12.138	£13.076	£14.087	£15.176
Pets At Home, London Road		1,013	100%	1,013	£2,000	£2.03	£2.087	£2.249	£2.422	£2.610	£2.811
Wickes, London Road		1,644	100%	1,644	£2,050	£3.37	£3.472	£3.740	£4.029	£4.341	£4.676
Argos Extra, Apsley Mills		929	100%	929	£12,000	£11.15	£11.485	£12.373	£13.329	£14.359	£15.469
Staples, London Road		619	100%	619	£1,400	£0.87	£0.893	£0.962	£1.036	£1.116	£1.202
Carpetright, Apsley Mills		923	100%	923	£940	£0.87	£0.894	£0.963	£1.037	£1.118	£1.204
Halfords, London Road		682	100%	682	£2,700	£1.84	£1.897	£2.044	£2.202	£2.372	£2.555
Homebase, Apsley Mill		5,640	100%	5,640	£1,050	£5.92	£6.101	£6.573	£7.080	£7.628	£8.217
Currys/PCWorld, Apsley Mill		1,112	100%	1,112	£5,500	£6.12	£6.301	£6.788	£7.312	£7.878	£8.486
Dunelm Mill, London Road		3,110	100%	3,110	£1,980	£6.16	£6.344	£6.834	£7.362	£7.931	£8.544
B&Q, Two Waters Rd		2,098	100%	2,098	£1,650	£3.46	£3.566	£3.842	£4.139	£4.459	£4.803
Tesco at Jarman Way	*1*	4,361	36%	1,570	£8,043	£12.63	£13.009	£14.014	£15.097	£16.264	£17.521
Sainsburys at Apsley		4,637	26%	1,206	£6,858	£8.27	£8.518	£9.176	£9.886	£10.650	£11.473
Sainsburys at Woodall Farm		1,758	15%	264	£6,858	£1.81	£1.863	£2.007	£2.162	£2.329	£2.509
Berkhamsted		7,870	100%	7,870	£4,500	£35.42	£36.485	£39.305	£42.343	£45.615	£49.141
Tring		3,147	100%	3,147	£4,500	£14.16	£14.590	£15.717	£16.932	£18.240	£19.650

Notes:

Table H : *Comparison Goods Capacity*

	Implied /Market Share Turnover £M	Benchmark Comparison Goods Turnover 2009 £M	Capacity £M	Implied /Market Share Turnover £M	Benchmark Comparison Goods Turnover 2011 £M	Capacity £M	Implied /Market Share Turnover £M	Benchmark Comparison Goods Turnover 2016 £M	Capacity £M	Implied /Market Share Turnover £M	Benchmark Comparison Goods Turnover 2021 £M	Capacity £M	Implied /Market Share Turnover £M	Benchmark Comparison Goods Turnover 2026 £M	Capacity £M	Implied /Market Share Turnover £M	Benchmark Comparison Goods Turnover 2031 £M	Capacity £M
Hemel Hempstead TC	£171.395	£200.920	-£29.525	£188.428	£206.993	-£18.565	£238.360	£222.990	£15.370	£300.946	£240.224	£60.722	£378.902	£258.789	£120.112	£474.710	£278.789	£195.920
Warehouses & Major Foodstores	£69.911	£75.418	-£5.507	£76.858	£77.697	-£0.839	£97.225	£83.702	£13.523	£122.753	£90.171	£32.582	£154.551	£97.140	£57.411	£193.630	£104.647	£88.983
Berkhamsted	£30.411	£35.415	-£5.004	£33.433	£36.485	-£3.052	£42.292	£39.305	£2.987	£53.397	£42.343	£11.054	£67.229	£45.615	£21.614	£84.228	£49.141	£35.088
Tring	£12.797	£14.162	-£1.364	£14.069	£14.590	-£0.521	£17.797	£15.717	£2.080	£22.470	£16.932	£5.538	£28.290	£18.240	£10.050	£35.444	£19.650	£15.794

Notes: Capacity comprises overtrading and growth in conveneince expenditure
Calculation is the difference between implied turnover (Table F Summary) and benchmark turnover (Table G).
Negative values denote undertrading/no capacity.

Table J : *Comparison Goods Capacity Summary*

Turnover Capacity	**Capacity 2009** £M	**Capacity 2011** £M	**Capacity 2016** £M	**Capacity 2021** £M	**Capacity 2026** £M	**Capacity 2061** £M
Hemel Hempstead TC	-£29.525	-£18.565	£15.370	£60.722	£120.112	£195.920
Hemel Hempstead Retail Warehouses & Major Foodstores	-£5.507	-£0.839	£13.523	£32.582	£57.411	£88.983
Berkhamsted	-£5.004	-£3.052	£2.987	£11.054	£21.614	£35.088
Tring	-£1.364	-£0.521	£2.080	£5.538	£10.050	£15.794

Capacity as Floorspace (Indicative)	**2009** sqm	**2011** sqm	**2016** sqm	**2021** sqm	**2026** sqm	**2031** sqm
Hemel Hempstead TC	**nil**	**nil**	**2,562**	**10,120**	**20,019**	**32,653**
Hemel Hempstead Retail Warehouses & Major Foodstores	**nil**	**nil**	**2,254**	**5,430**	**9,568**	**14,830**
Berkhamsted	**nil**	**nil**	**498**	**1,842**	**3,602**	**5,848**
Tring	**nil**	**nil**	**347**	**923**	**1,675**	**2,632**

Notes: From Table H.
Capacity is converted to equivalent convenience goods sales floorspace using a trading density of 6000 £/per square meter

DACORUM BOROUGH COUNCIL TOWN CENTRE HEALTH CHECKS

APPENDIX B

DACORUM BOROUGH COUNCIL TOWN CENTRE HEALTH CHECKS

In this Appendix we review the health of Hemel Hempstead, Berkhamsted and Tring Town Centres against the various indicators of vitality and viability set out in PPS4.

Often, particularly for smaller centres, limited or no published data is available for certain of the indicators. In such circumstances, we provide where appropriate commentary based upon our own observations.

Visits have been made to Hemel Hempstead, Berkhamsted and Tring during August and September 2011 to collect information for these health checks.

Measuring Town Centre Vitality and Viability: Health Checks

PPS4 provides guidance to Local Planning Authorities in relation to measuring the vitality and viability of town centres, monitoring their health and their change over time. The following key indicators used to determine the vitality and viability of town centres are set out in Annex D of PPS4.

- ***A1 - Diversity of main town centre uses (by number, type, and amount of floorspace)***: the amount of space in use for different functions – such as offices; shopping; leisure; cultural and entertainment activities; pubs, cafes and restaurants; and, hotels;

- ***A2 - The amount of retail leisure and office floorspace in edge of centre and out of centre locations***;

- ***A3 - The potential capacity for growth or change of centres in the network***: opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre developments;

- ***A4 - Retailer representation and intentions to change representation***: existence and changes in representation of types of retailer, including street markets, and the demand of retailers wanting to come into the centre, or to change their representation in the centre or to reduce or close their representation;

- ***A5 - Shopping rents***: pattern of movement in Zone A rents within primary shopping areas (ie. The rental value for the first 6 metres depth of floorspace in retail units from the shop window);

- ***A6 - Proportion of vacant street level property***: vacancies can arise even in the strongest town centres, and this indicator must be used with care. Vacancies in secondary frontages and changes to other uses will also be useful indicators;

- ***A7 - Commercial yields on non-domestic property (ie the capital value in relation to the expected market rental)***: demonstrates the confidence of investors in the long-term profitability of the centre for retail, office and other commercial developments. This indicator should be used with care;

- ***A8 - Land values and the length of time key sites have remained undeveloped:*** data on changes in land value and how long key town centre and edge of centre sites have remained undeveloped provide important indicators for how flexible policies should be framed and can help inform planning decisions;

- ***A9 - Pedestrian flows (footfall)***: a key indicator of the vitality of shopping streets, measured by the numbers and movement of people on the streets, in different parts of the centre at different times of the day and evening, who are available for businesses to attract into shops, restaurants or other facilities;

- ***A10 - Accessibility***: ease and convenience of access by a choice of means of travel, including – the quality, quantity and type of car parking; the frequency and quality of public transport services and the range of customer origins served; and, the quality of provision for pedestrians, cyclists and disabled people and the ease of access from main arrival points to the main attractions;

- ***A11 - Customer and residents' views and behaviour***: regular surveys will help authorities in monitoring and evaluating the effectiveness of town centre improvements and in setting further priorities. Interviews in the town centre and at home can be used to establish views of both users and non-users of the centre, including the views of residents living in or close to the centre. This information could also establish the degree of linked trips;

- ***A12 - Perception of safety and occurrence of crime***: should include views and information on safety and security, and where appropriate, information for monitoring the evening and night-time economy; and

- ***A13 - State of the town centre environmental quality***: should include information on problems (such as air pollution, noise, clutter, litter and graffiti) and positive factors (such as trees, landscaping and open spaces).

A detailed health check as per these key indicators has been carried out for Hemel Hempstead, Berkhamsted and Tring and is set out within the following tables.

Additionally, town centre plans which illustrate the mix of uses in each of the centres are provided.

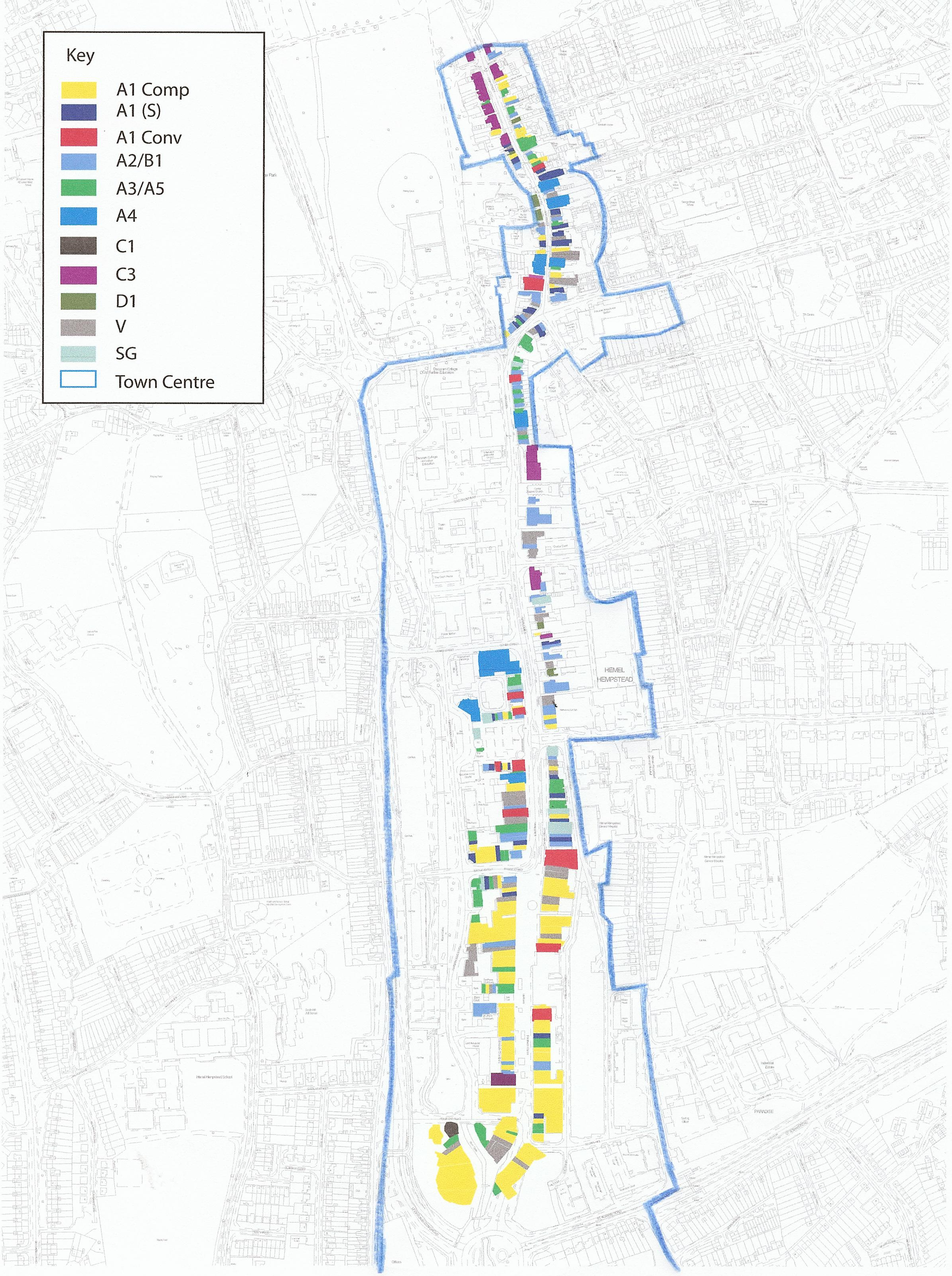
APPENDIX B

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	HEMEL HEMPSTEAD
A1 - Diversity	Hemel Hempstead is one out of three designated town centres within Dacorum Borough Council, is identified as a minor sub regional centre and is the main centre serving this area. The primary shopping area is focused along the Marlowes which includes the Marlowes Shopping Centre. The centre is dominated by comparison goods shops. The comparison offer is strong with better quality retailers locating in the new Riverside Shopping Centre and within the Marlowes Centre. However the Marlowes (shopping street) is of poorer quality with a significant number of discount stores, betting shops, charity shops and amusement arcades. There are also a significant proportion of services which include banks/building societies, travel agents and betting shops. Although the centre is primarily made up of comparison goods shops there is convenience shopping provision comprising Asda, Iceland (located to the east of the Marlowes) and a small Tesco Express which is located on the Marlowes. In addition to this there is a smaller convenience supermarket located on the Marlowes called the Mosaic Supermarket and a foodhall within the M&S store in the Marlowes Shopping Centre. There are a number of vacant shop units (28 units, of which 11 are located within the Marlowes Shopping Centre and 6 within the Riverside Shopping Centre). In addition to the main retail area focused upon the Marlowes, the Old Town makes up further secondary retail offer. However, it is important to note that the Old Town is separated from the new town and consists mainly of service uses such as restaurants/cafes/takeaways, pubs and estate agents with a small comparison shopping offer.
A2 - Floorspace in edge of centre and out of centre locations.	With regards to convenience shopping this is mostly located toward the edge of the town centre, this includes the Asda and Iceland which are located to the east of the Marlowes. Out of centre, Hemel Hempstead is well supplied with both retail warehousing and main food stores.
A3 - Potential capacity for growth or change	There are a number of underutilised sites and spaces within and around the town centre which present opportunities for redevelopment and potential growth of the town centre.
A4 - Retailer representation and intentions to change	The major comparison retailers located within the 'new' town centre include Debenhams, TK Maxx, HMV, H&M, Next, Primark, Marks & Spencers and New Look. The major convenience retailers consist of Asda, Iceland and

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	HEMEL HEMPSTEAD
	Tesco (Express). The old town mainly consists of antique and furniture shops with a few boutique style shops. Other provision includes retail services such as hair salons, restaurants, pubs and estate agents.
A5 - Shopping rents	The 2009 retail study commissioned by Dacorum Borough Council indicated Zone A rental values within the town centre achieved levels of around £860/sqm in June 2007. This had risen by £110/sqm from 2002. The Focus Database suggest retail rents in Hemel Hempstead had actually fallen by 2009 and were around £700/sqm.
A6 - Vacancies	There are currently 40 vacant units within Hemel Hempstead town centre (old and new centres). This calculates to an 11% vacancy rate for the overall town centre. With regards to the new town there are 28 vacant units, meaning that there is currently a 10% vacancy rate. Eleven of the vacant units are located within the Marlowes Shopping Centre, this could be attributed to the fact that the Riverside Shopping Centre has only recently opened and there have been some relocations. A further 8 of the vacant units are located on the Marlowes. They are mainly located to the northern end of the street where the shops in that location are mostly charity and discount shops. The old town currently has 12 vacant units which relates to a vacancy rate of 13%. This is quite a high vacancy rate considering there are only 92 units in total in this area. In addition, five of the 12 vacant units are next door to each other (29 to 35 High Street), which gives the overriding impression that there are more vacancies.
A7 - Commercial yields	No published Data.
A8 - Land values	No Published Data.
A9 - Pedestrian flows	Footfall within the 'new' town centre is reasonable. Pedestrian activity was mainly focused between the southern end of the Marlowes where the Riverside Shopping Centre is located along the Marlowes to Bridge Street. Beyond Bridge Street, we consider the primary frontage ends and the shops become more service orientated and of a much lower quality. Generally the Old Town is quieter, however there are a number of restaurants and bars/pubs in this area, and evenings are likely to be as busy as the day time. In addition as the retail offer is more specialist people would only shop there if they were looking for furniture/antiques. With regards to the convenience offer in the centre, the Asda is generally

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	HEMEL HEMPSTEAD
	busy, the Tesco Express is also busy, the Iceland appears less popular. It was noted also that the foodhall within M&S was busy.
A10 - Accessibility	Hemel Hempstead town centre is accessible. It is easily accessed by car and has a good level of car parking facilities (six car parks in total in very close proximity to the TC) located around the town centre area. The town is also easily accessed by bus. Frequent bus services run form the train station to the town centre.
A11 - Customer and residents' views and behaviour	No update since 2009 study.
A12 - Safety and crime	There was evidence of CCTV monitoring along the Marlowes. The majority of the retail units are enclosed within the two shopping centres and therefore subject to CCTV and security patrols. There was no obvious sign that the centre was unsafe or that shoppers would feel threatened in any way. With regards to evening activity there are only three bars/pubs towards the northern end of the Marlowes and a couple of restaurants at the southern end which are part of the Riverside Shopping Centre. This suggests that the main part of the centre is reasonably quiet in the evening.
A13 - Environmental quality	The environmental quality of the centre varied. The southern end of the new town at the Riverside Shopping Centre is well maintained and pleasant with high quality street furnishings. However as you walk along the Marlowes towards the Market Square which is situated to the west of the Marlowes the environmental quality is less strong, primarily due to the poor maintenance of shopfronts and street furnishings. The northern end of the Marlowes is less healthy with more vacant units and poorly maintained shop fronts. The Old Town, has a more historic feel to it with well-maintained shopfronts and original facades above the shops. Although there are quite a few vacant units the area still has a pleasant feel.

HEMEL HEMPSTEAD TOWN CENTRE: MIX OF USES, DECEMBER 2010

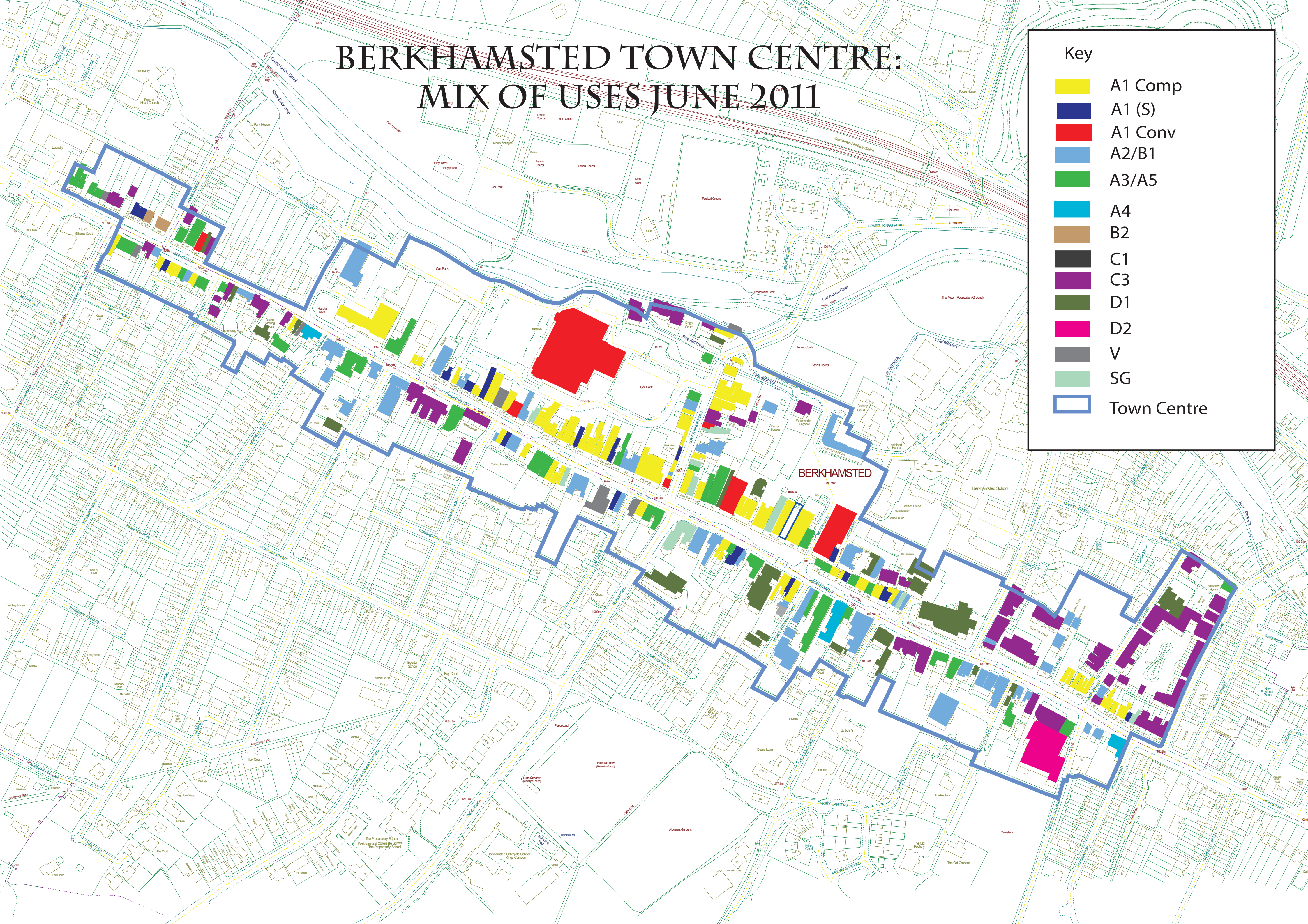


APPENDIX B

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	BERKHAMSTED
A1 - Diversity	Berkhamsted is identified as a Town Centre and sits below Hemel Hempstead in the local hierarchy. The main retail area of Berkhamsted is focused along the High Street. The centre is mostly dominated by service and comparison offer. The service offer is made up of cafes, estate agents and banks etc, while the comparison offer is mainly boutique style shops. The centre comes across as being fairly upmarket with only a few lower quality discount type shops. The convenience offer is primarily made up of the Waitrose situated to the north of the High Street and the Tesco Metro located on the High Street. There are a few vacant units located on the High Street, however most are located on the side streets off the main shopping street.
A2 - Floorspace in edge of centre and out of centre locations.	The majority of the retail offer is within the primary shopping frontage. With regards to convenience, the Waitrose is essentially edge of centre, tucked away behind the High Street.
A3 - Potential capacity for growth or change	Berkhamsted's linear structure and relatively constrained nature presents limited opportunities for expansion. The Local Plan identifies land off High Street and Water Lane for a town centre redevelopment scheme to include a food supermarket.
A4 - Retailer representation and intentions to change	The major comparison retailers include Fatface, Laura Ashley and Boots. However, the centre has a very historic feel to it and is located within a conservation area, therefore the type of shops reflect this with the comparison offer mainly being made up of boutique style shops.
A5 - Shopping rents	No published data.
A6 - Vacancies	There are currently nine vacant units in Berkhamsted, which equates to a vacancy rate of 4%.
A7 - Commercial yields	No published data
A8 - Land values	No published data
A9 - Pedestrian flows	Berkhamsted's town centre is busy with viable pedestrian flows, the central part of the High street was busiest. Both Waitrose and Tesco Metro are considered to trade at reasonable levels.
A10 - Accessibility	Berkhamsted is an accessible town centre. It is a short five minute walk from the train station to the High Street. Bus services are frequent along the High Street and car parking provision appeared to be very well used.

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	BERKHAMSTED
A11 - Customer and residents' views and behaviour	No update since 2009 study.
A12 - Safety and crime	There was evidence of CCTV being used in the town centre. As the main street is well maintained with high quality boutiques and cafes located along it there was little evidence of crime or graffiti and no perception or threat of crime. In addition it can be assumed that there is a good level of evening activity and use as there are a number of restaurants and bars/pubs spread along the High Street.
A13 - Environmental quality	The environmental quality of the centre is high with shopfronts and pavements well maintained and the overall fabric of the town centre presents attractively. The centre is located within a conservation area.

BERKHAMSTED TOWN CENTRE: MIX OF USES JUNE 2011

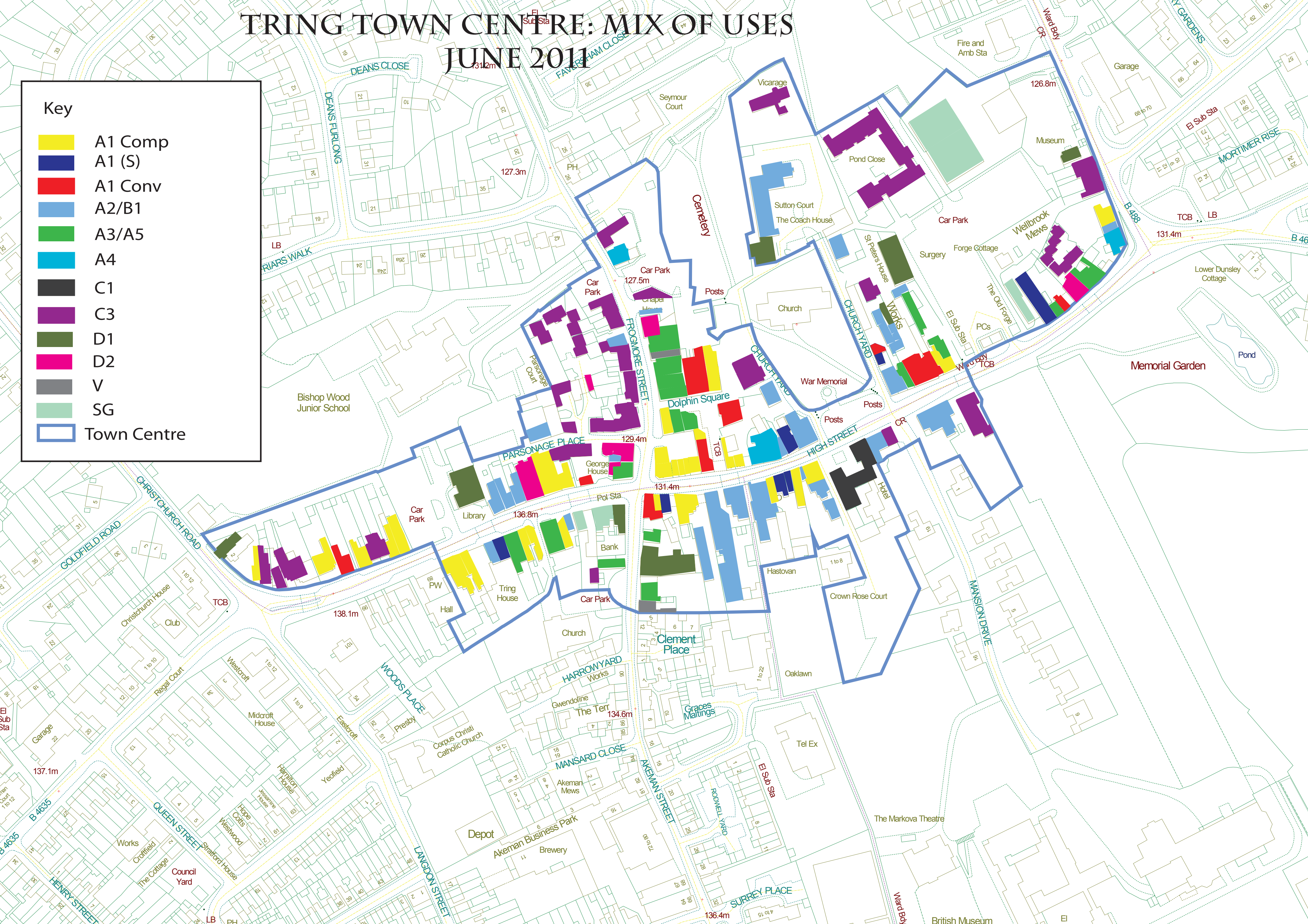


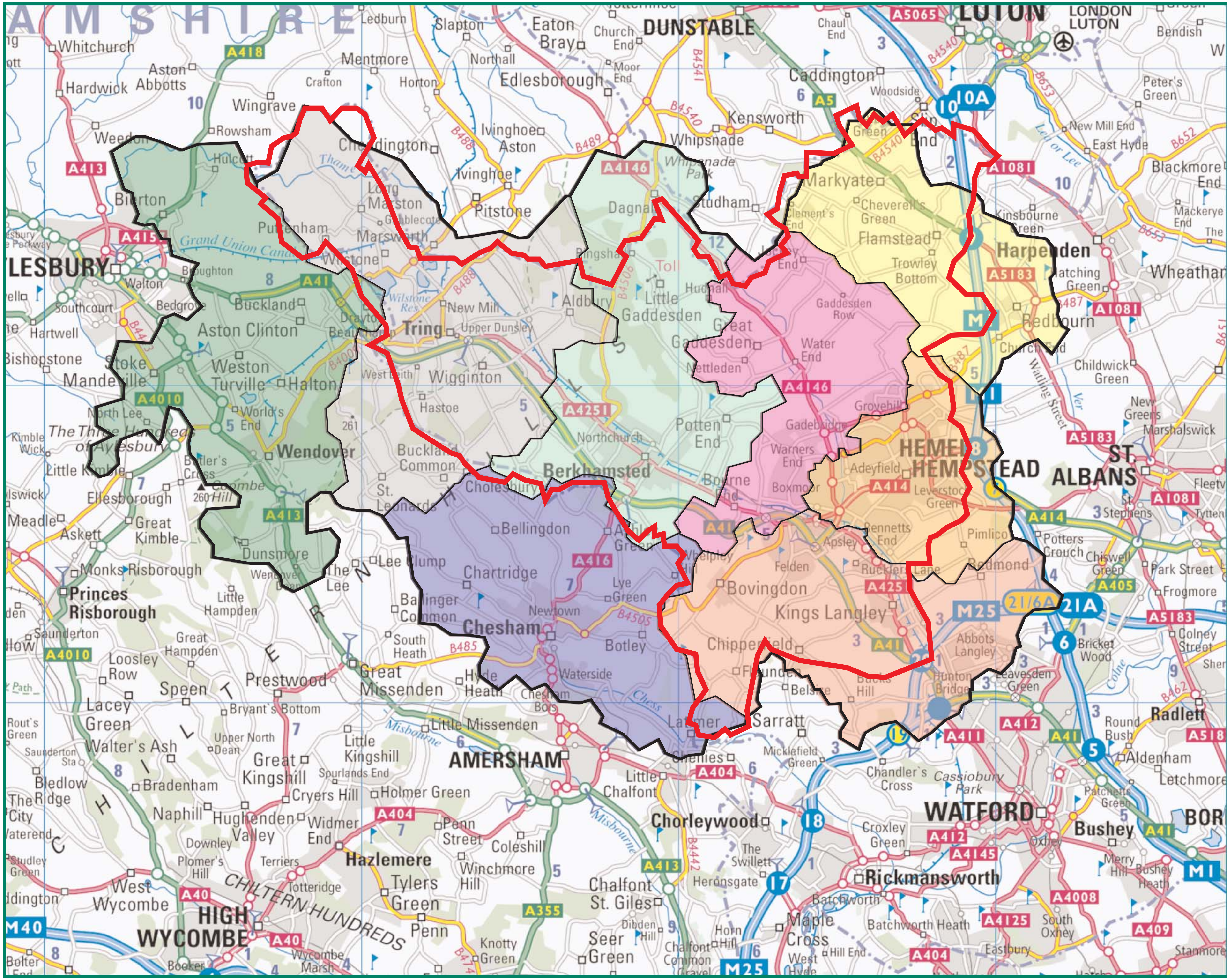
APPENDIX B

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	TRING
A1 - Diversity	Tring town centre's shopping is focused upon High Street extending from Brook Street in the east to Christchurch Road/Eastcfroft in the west. There is also a more recent shopping precinct (Dolphin Square) located on the north side of High Street. Tring has a mix of national multiple retailers (M&S Simply Food, Martins, SpecSavers and Lloyds Pharmacy) and local independent retailers. The centre also has a diverse mix of quasi-retail and service uses including the main national High Street Banks, estate agents, restaurants, cafes and take away food outlets, hair and beauty and dry cleaners. The town centre also has a library, churches and a hotel.
A2 - Floorspace in edge of centre and out of centre locations.	Outside Tring town centre there is a Tesco Supermarket at London Road. The store is approximately 1 km from the main town centre area. The store has a sales area of 1,624 sqm and approximately 200 car parking spaces. This is the largest food store in Tring and is popular for main food shopping.
A3 - Potential capacity for growth or change	Tring town centre is comprised of a number of attractive older buildings and is relatively constrained. The scope for expansion of the existing retail area of the town centre is therefore limited.
A4 - Retailer representation and intentions to change	There is no published data on retailer demand for premises in Tring. Observations in centre suggest that any vacant premises in the town are quickly re-let, indicating a good level of local demand for premises.
A5 - Shopping rents	There is no published data on shopping rents in Tring.
A6 - Vacancies	Our survey of existing uses in August 2011 found no vacant premises within the town centre.
A7 - Commercial yields	There is no data available on retail property yields in Tring.
A8 - Land values	There is no data available on Land Values in Tring.
A9 - Pedestrian flows	There are no published pedestrian flow counts for Tring. Pedestrian levels within the town centre appear viable with the greatest footfall based on our observations around Dolphin Square and on the northern side of High Street around the Dolphin Square entrance.
A10 - Accessibility	Whilst Tring has a train station, this is outside the town centre. There are bus routes and stops along the High Street and our observations suggest bus services are reasonably well used. However, the main travel mode of access to Tring appeared to be by car, car parks were generally busy.
A11 - Customer and residents' views and	No up to date information on resident's views. Observations suggest that Tring town centre is primarily a top-up shopping and service based centre.

TOWN CENTRE VITALITY AND VIABILITY INDICATORS	TRING
behaviour	
A12 - Safety and crime	We have not obtained local crime statistics for Tring. Based on visits to the centre, we consider the centre feels safe and there were no apparent safety or crime issues.
A13 - Environmental quality	Tring has a very pleasant environment. The shopping area and shop frontages are well maintained whilst the High Street is subject to traffic flows, there is limited conflict between vehicles and pedestrians.

TRING TOWN CENTRE: MIX OF USES
JUNE 2011





KEY

Dacorum Boundary

Zone 1

Zone 2

Zone 3

Zone 4

Zone 5

Zone 6

Zone 7

Zone 8

Drawing Title

Study Zones Plan

Job Title

Dacorum Retail Study Update

Client

Dacorum Borough Council

Scale	Not to Scale	Date	September 2011
Drawn By	JP	Job No	J026219
Authorised By	AJ		

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