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Planning Design Economics

Tesco Proposals, Broadwater Road West Welwyn Garden City

Review of PPS4 Retail Assessment

Welwyn Hatfield Council

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1.0 Introduction

Background

1.1 Welwyn Hatfield Council has received a planning application on behalf of Spenhill Regeneration Ltd for a new Tesco food store at Broadwater Road West in Welwyn Garden City.

1.2 The application comprises a food store of 4,646 sq m net, split 2,907 sq m for the sale of convenience goods and 1,739 sq m for the sale of comparison goods. A PPS4 Retail Assessment has been prepared by DP9 Planning Consultants (DP9) to accompany the application.

1.3 Nathaniel Lichfield and Partners (NLP) has been commissioned by Welwyn Hatfield Council to undertake an independent review of the retail assessment prepared by DP9. NLP previously prepared for the Council a Retail Needs Assessment in 2007. This study was recently updated in November 2010.

1.4 This report considers the retail planning issues raised by the proposals only. The report has been prepared in draft for consultation. A final version will be prepared taking on board any feedback received.

Objectives

1.5 This report sets out our appraisal of the DP9 retail assessment and comprises a review of:

- the data sources used;
- the methodology and key assumptions;
- the application of the sequential approach; and
- the validity of the interpretation of the retail impact assessment results.

Report Structure

1.6 Section 2.0 provides an appraisal of the data and methodology used by DP9 in preparing the retail assessment. Section 3.0 assesses retail impact. Section 4.0 sets out our critique of the sequential approach and Section 5.0 summarises our conclusions.

2.0 Base Data and Methodology

Introduction

2.1 DP9 seeks to demonstrate the food store will not have an adverse impact on designated centres. We have reviewed the base data and assumptions adopted by DP9 in this section. PPS4 (published in December 2009) indicates that applicants are no longer required to demonstrate need.

Base Year, Design Year and Price Base

2.2 The base year adopted by DP9 is 2008. NLP's update adopts 2010 as the base year.

2.3 The design year adopted by DP9 to assess the impact of the Tesco store is 2016. Allowing two years for construction and a further two years to achieve settled trading patterns, 2015 may be the earliest possible design year. DP9's adoption of 2016 should not make a significant difference.

2.4 DP9 has used a 2008 price base. NLP's November retail study update adopts 2009 prices consistent with Experian's latest local expenditure figures and Verdict's food store turnover densities.

Catchment Definition

2.5 DP9 has adopted NLP's study area divided into 9 zones. DP9 assumes most (about 78%) of the Tesco store's turnover will come from Zones 1 and 3. We agree that the proposed food store's primary catchment area will be Zones 1 and 3.

Population and Expenditure

Population

2.6 DP9 has adopted population projections for the study area from NLP's 2007 retail study. These population projections were based on the East of England Regional Assembly Group 3 Dwellings Based Forecasts. Population projections have been updated based on Chelmer East of England Population Projections Scenario 2 December 2009, as shown in Table 1 in Appendix 1 of this report.

2.7 The updated population figures are not significantly different for the 2008 base year (351,611 now compared with 350,808 for the study area as a whole). However population projections to 2016 are now lower than previously forecast (361,387 now compared with 366,631 for the study area as a whole). DP9 may have over-estimated population in 2016 by 1.45%.

Expenditure

2.8 DP9's expenditure figures adopt Experian local expenditure figures and projections for the catchment area, provided by NLP back in February 2010. NLP has adopted the Experian's latest 2009 local expenditure data, and the future forecasts have been amended to reflect Experian's latest information contained within the Retail Planner Briefing Note 8.1 (August 2010). NLP's revised expenditure figures are shown in Tables 2 and 3 in Appendix 1 and 2 of this report.

2.9 Experian's latest growth projections for expenditure are now slightly lower than previous forecasts and the amount to be deducted for special forms of trading is now higher.

2.10 Taking into account differences in population and expenditure per capita DP9 and NLP's latest total expenditure estimates for the study area as a whole are as follows:

	2010 - Convenience	**2016 - Convenience**	**2010 – Comparison**	**2016 - Comparison**
DP9 (2008 prices)	£663.50m	£701.79m	£999.56m	£1,306.30m
NLP (2009 prices)	£628.62m	£649.16m	£978.65m	£1,221.21m
% difference	+5.5%	+8.1%	+2.1%	+7.0%

2.11 DP9's expenditure figures do not reflect the latest available information, and the implications of NLP's more up to date (and lower) expenditure projections on their impact assessment need to be tested.

Base Year Shopping Patterns

2.12 DP9 has estimated base year convenience and comparison shopping patterns using the penetration rates adopted in NLP's 2007 study, adjusted to reflect completed development between 2007 and 2008.

Convenience Goods

2.13 DP9 estimates that the base year turnover of convenience facilities in Welwyn Hatfield is £229.12 million in 2008, compared with a benchmark turnover of £206.35 million. This implies a 2008 expenditure surplus of £22.77 million.

2.14 NLP's base year turnover of convenience facilities in Welwyn Hatfield is £220.24 million in 2010 (2009 prices), base on DP9's market share assumptions (see Tables 4 and 5 in Appendix 1). NLP's figure is lower despite the later price base (2009 rather than 2008) and later base year (2010 rather than 2008). This difference is due to the effects of the recession on expenditure per capita levels.

2.15 NLP's revised benchmark turnover (2009) for existing convenience facilities as set out in the first table in Appendix 1 is £218.14 million (excluding the proposed Sainsbury's store enlargement). The main reason for NLP's higher benchmark turnover is the change from the 2008 to 2009 price base. Some of the company average turnover densities have changed in Verdict's latest 2010 figures e.g. the Sainsbury's and Waitrose figures have increased whilst the Asda figure has reduced.

2.16 NLP's figures suggest an expenditure surplus of £2.1 million in 2010, rather than the £22.77 million surplus suggested by DP9. These surplus expenditure figures do not take into account the implementation of the enlarged Sainsbury's store in Welwyn Garden City town centre.

2.17 If NLP's expenditure figures and benchmark turnovers, then DP9 has not assessed the worst case level of impact, because the base year trading levels have been over-estimated.

Comparison Goods

2.18 DP9 estimates that the base year turnover of comparison facilities in Welwyn Hatfield is £354.16 million in 2008. NLP's base year turnover of comparison facilities in Welwyn Hatfield is £349.09 million in 2010 (2009 prices), see Table 4 in Appendix 2. The figures are broadly comparable, but DP9's extrapolated figure for 2010 would be about £369 million, £20 million higher than NLP's figure. Some of this difference may be due to deflation between 2008 to 2009 prices. The remainder is due to the effects of the recession.

The Proposed Tesco Store

2.19 The proposed Tesco store is expected to have a net sales area of 4,646 sq m net. DP9 impact assessment is based on these figures. If the Council is minded to grant planning permission then it will be necessary to control the maximum amount of sales floorspace as planned (i.e. not more than 4,646 sq m net), in order to ensure expected impact is as predicted by DP9.

2.20 DP9 state that the sales floorspace will be split 2,907 sq m net for convenience goods and 1,739 sq m net for comparison goods, again this should be controlled by condition if the application is permitted.

2.21 DP9 suggest that the sales densities will be £12,786 per sq m net for the convenience element of the store and £11,081 per sq m net for the comparison element. This gives a total convenience turnover of £37.17 million and a comparison turnover of £19.27 million. The total turnover of the store is £56.44 million.

2.22 In our view DP9 has not under-estimated the expected turnover of the proposed Tesco store at 2016.

2.23 DP9 suggests the claw back of expenditure attracted to out of centre food stores (Morrison's Welwyn Garden City and Tesco Hatfield) to the proposed 'edge of centre' Tesco store and the ability to generate linked trips to the town centre supports the requirement case for the store. These expected benefits are explored later in this report.

Town Centre Health Checks

2.24 PPS4 Policy EC16 requires applicants to assess the impact of the development on the vitality and viability of town centres. DP9 has undertaken a relatively brief health check of Welwyn Garden City town centre (Section 3) and no assessment is provided for Hatfield town centre. NLP's 2007 study provided a comprehensive health check for both centres.

Trade Diversion

2.25 DP9 estimates convenience goods trade diversion at 2016 in Table CON16. The distribution of trade diversion is summarised below.

- Sainsbury's, Church Road = £4.34m
- Waitrose, Bridge Road = £2.37m
- Morrisons, Black Fan Road = £6.75m
- Asda, Hatfield town centre = 1.09m
- Tesco, Hatfield = £14.53m
- Other shops/stores in Welwyn GC centre = £0.29m
- Other shops/stores in Welwyn Hatfield = £0.68m
- Elsewhere = £7.12m

2.26 Most of the Tesco store's turnover is expected to be diverted from large food stores. Trade diversion from stores within Welwyn Garden City and Hatfield town centres (£8.09 million – less than 22% of the Tesco store's turnover) is in our view unrealistically low, because the proposed store will also compete directly with these stores for both main and top-up food shopping trips, as well as out of centre stores. DP9 has attempted to spread trade diversion thinly and disproportionately towards out of centre stores and other towns, reducing trade diversion from Welwyn Garden City and Hatfield town centres.

2.27 DP9 has not specifically addressed the impact on nearby convenience stores within designated neighbourhood centres i.e. Somerfield at Cole Green Lane and One Stop at Peartree Lane. Given our concerns regarding DP9's expenditure figures and distribution of trade diversion, we have undertaken our own independent retail impact assessment in Section 3.

3.0 Retail Impact

Introduction

3.1 Government guidance contained within the recently adopted PPS4 sets out an enhanced impact assessment. Proposals for retail and town centre uses that are not located within an existing centre or in accordance with an up to date development plan must satisfy the ‘significant adverse impact’ tests before their positive and negative impacts and other material considerations are assessed.

3.2 The impact test consists of two sets of assessments; one applying to all forms of economic development and the other to town centre uses only. Applications for economic development should be assessed against the following impact considerations (policy. EC10.2):

a whether the proposal has been planned over the lifetime of the development to limit carbon dioxide emissions and minimise vulnerability and provide resilience to climate change;

b the accessibility of the proposal by a choice of means of transport including walking, cycling, public transport and the car, the effect on local traffic levels and congestion (especially on the trunk road network) after public transport and traffic management measures have been secured;

c whether the proposal secures a high quality and inclusive design which takes the opportunities available for improving the character and the quality of the area and the way it functions;

d the impact on economic and physical regeneration in the area including the impact on deprived areas and social inclusion objectives;

e the impact on local employment.

3.3 Policy EC16 states that planning applications for town centre uses should be assessed against the following impacts on centres:

a the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the study area of the proposal;

b the impact of the proposal on the town centre vitality and viability, including local consumer choice and the range and quality of the comparison and convenience offer;

c the impact of the proposal on allocated sites outside town centres being developed in accordance with the development plan;

d in the context of a retail or leisure proposal, the impact of the proposal on in- centre trade/turnover and on trade in the wider area, taking account of current and future consumer expenditure capacity in the study area to five years from the time the application is made and where applicable, on the rural economy;

e if located in or on the edge of a town centre, whether the proposal is of an appropriate scale (in terms of gross floorspace) in relation to the size of the centre and its role in the hierarchy of centres;

f any locally important impacts on centres under policy EC3.1.e (which requires RPB and LPAs as part of strategy for management and growth of centres to define any locally important impacts on centres which should be tested.

3.4 If a proposal is likely to lead to a significant adverse impact, whether on its own or cumulatively, it should be refused. Where there is no significant adverse impact, the local planning authority is required to determine an application taking account of the positive and negative impacts of the proposal and any other material considerations, and the likely cumulative effect of recent permissions, developments under construction and completed developments.

3.5 Para. 7.27 of the Practice Guidance on need, impact and the sequential approach which accompanies PPS4 states that where competing proposals come forward on other edge or out of centre sites, the effects of both will need to be assessed and a judgement made as to which offer the most overall benefit in policy terms.

3.6 Appendix D of the Practice Guidance provides guidance on quantifying impact, and at para. D.7 notes that conventionally, cumulative impact assessments take into account the effect of known commitments ie. schemes with planning permission. However, the Guidance states that it may be relevant, in policy terms, to judge the cumulative effect of other proposals.

Convenience Goods Trade Diversion and Impact

3.7 DP9 estimates trade diversion in their Table CON16. As indicated in Section 2, we have concerns regarding DP9's estimated distribution of convenience goods trade diversion.

3.8 Building on NLP's retail study update, we have assessed the convenience goods impact of the proposed Tesco food store. This assessment examines trading patterns in the base year 2010 and design year 2016.

Base Year 2010 Shopping Patterns

3.9 Base year market shares for convenience goods shopping are shown in Table 4 in Appendix 1. These market shares are consistent with DP9's base year figures. Base year turnover figures are shown in Table 5.

3.10 The turnover of convenience facilities in Welwyn Hatfield is estimated to be £220.24 million (last column of Table 5 in Appendix 1). NLP's benchmark turnover for these existing facilities is £218.14 million. The figures suggest that collectively convenience retail facilities in Welwyn Hatfield are trading just above benchmark turnover levels.

Future Trading Patterns in 2016 – Without Tesco

3.11 The future turnover of existing convenience shopping facilities in Welwyn Hatfield at 2016 is shown in the last column of Table 7 in Appendix 1. This scenario assumes the implementation of Sainsbury's new expanded store in Welwyn Garden City town centre. These projections are based on the expected growth in expenditure and are based on DP9's projected market shares with the expanded Sainsbury's store in Welwyn Garden City town centre. In total the amount of convenience expenditure attracted to Welwyn Garden City is expected to increase from £220.24 million to £231.29 million due to expenditure growth between 2010 and 2016 and increase market share due to the Sainsbury's development.

3.12 The convenience turnover of the Waitrose store is expected to reduce from £26.34 million in 2010 to £24.35 million in 2016, due to the impact of the enlarged Sainsbury's store. The turnover of other convenience facilities in the town centre is expected to increase slightly from £10.96 million in 2010 to £11.09 million in 2016, because expenditure growth is expected to offset the impact of the enlarged Sainsbury's store.

Future Trading Patterns in 2016 – With Proposed Tesco Store

3.13 The expected convenience turnover and trade draw of the proposed Tesco store is shown in Table 8 in Appendix 1. This table is based on DP9's turnover figure and expected trade draw for the proposed store.

3.14 The revised shopping patterns with the Tesco store included are shown in Table 9. The pattern of trade diverted from existing facilities is based on current shopping patterns, the expected trade draw of the Tesco store shown in Table 8, and judgments about the propensity for the Tesco store to compete with other facilities for food and grocery shopping trips.

3.15 The impact results are summarised in Table 10 in Appendix 1. The highest proportional impact will fall on large food stores in Welwyn Hatfield. Trade diversion from the two main stores in Welwyn Garden City town centre, Sainsbury's (as expanded) and Waitrose is about 24.5% and 16.7% respectively. By way of comparison DP9 suggest impact of 14% and 9% respectively.

3.16 Impact on other convenience facilities in Welwyn Garden City town centre is estimated to be 6.4%, primarily from the Marks & Spencer and Iceland. DP9's comparable impact figure is 2%. NLP's overall impact on the convenience sector in the town centre is -£11.71 million and an impact of 18.4%. DP9's comparable figures are -£7 million and an impact of 10.2%.

3.17 The cumulative reduction in the Waitrose store's convenience goods turnover is from £26.34 million in 2010 to £20.29 million in 2016, a 23% reduction. The turnover of other convenience facilities in the town centre is expected to decrease from £10.96 million in 2010 to £10.38 million in 2016, a reduction of 5.3%.

3.18 NLP's figures suggest the Sainsbury's and Waitrose residual turnovers (£21.42 million and £20.29 million) will be about 23% to 24% below their benchmark turnovers. These relatively low levels of turnover do not necessarily indicate either the Sainsbury's or Waitrose stores will close, because some stores will trade above average and other will trade below.

3.19 The likelihood a town centre store will close is not the only relevant impact issue highlighted in PPS4 EC16.1. The impact on existing, committed and planned investment needs to be considered. Impact on existing investment could be the closure of existing stores or the likely prevention of future investment to maintain/improve existing stores.

3.20 The Waitrose store is existing investment and as indicated above there is no evidence to suggest this store is likely to close despite trading 24% below the company average. Waitrose has recently extended and invested in their store, and it provides a modern facility. The impact of the Tesco store on Waitrose's future investment decisions for this store is unlikely to have a significant impact from a customers perspective and Waitrose is unlikely to reverse recent investment in the store.

3.21 Sainsbury's are currently redeveloping their store and this issue is more relevant. The PPS4 practice guidance indicates impact on future investment proposals is relevant, but the stage of development and level of commitment needs to be considered. Having started development it seems unlikely Sainsbury will not complete their new store if Tesco is approved.

3.22 It seems unlikely any main operator (Waitrose, Sainsbury's, Marks & Spencer or Iceland) would chose to close their store, but the low turnover may affect current and future investment decisions.

3.23 Impact on convenience facilities in Hatfield town centre is estimated to be 6.1% (-£2.31 million) in 2016, most of which will come from the Asda store. The cumulative reduction in Hatfield town centre's convenience goods turnover is from £37.38 million in 2010 to £35.54 million in 2016, a 4.9% reduction. The Asda store is unlikely to close and impact on small convenience shops in the town centre will be offset by expenditure growth between 2010 and 2016.

3.24 Impact on convenience stores in the closest neighbourhood centres will be around 5 % to 6%. Impact on the Somerfield store in Woodhall Neighbourhood Centre is estimated to be 6% and the impact on other convenience shops in the neighbourhood centre is estimated to be 4.4%. Impact on convenience goods facilities in Peartree Lane neighbourhood centre is estimated to be 5.6%, primarily the One Stop.

3.25 Convenience shopping facilities in these two neighbourhood centres are small stores/shops that rely predominantly on top-up shopping rather than main food shopping trips from customers who live within walking distance or passing trade. The Tesco store should not compete directly with these facilities. However the Tesco store's top up shopping catchment will overlap to some extent with these neighbourhood centres and some trade diversion is likely. This catchment overlap is reflected in our impact estimates summarised above. NLP's impact figures suggest it is unlikely the Somerfield, One-Stop or other convenience shops will be forced to close due to the impact of the Tesco store. The impact on comparison shops is addressed later in this section.

3.26 The cumulative reduction in the Morrison's convenience goods turnover is from £26.92 million in 2010 to £18.96 million in 2016, a 29% reduction. The store's residual turnover (£18.96 million) is about 40% below the company average. We estimate the Morrison store is currently trading 15% below the company average in 2010, and this will increase to 24% below following the implementation of the new Sainsbury store in Welwyn Garden City town centre. There is risk this level of cumulative impact could force the Morrison's store to close.

3.27 PPS4 Policy EC16.1 relates to impact on centres. It does not specify impact on other out-of-centre stores. PPS4 does require applicants to consider impact on the wider area e.g. the rural economy. It also suggests locally impacts should be considered, but again this only relates to impacts on centres, and also only locally important impacts identified in development plans (PPS4 Policy EC3.1.e.). The Morrison's store at Black Fan Road is not a designated centre within the adopted development plan.

3.28 If the Morrison store closes then the benefit of the Tesco store in respect of improved consumer choice and competition would be lost and the distribution of food stores in Welwyn Garden City urban area will be inferior.

3.29 The Tesco store has a more frequent bus service. We understand the application site has 15 buses per hour Mondays to Fridays, 11 buses per hour on Saturdays and one or two buses per hour on Sundays, compared with the Morrison store which has a half-hourly bus service Mondays to Saturdays. The Tesco store appears to be preferable to the Morrison store in terms of public transport accessibility and therefore potential usage. However, the Morrison store is preferable in terms of walk-in catchment. The Morrison store has 792 dwellings within 400 metres and 3,795 dwellings within 720 metres, compared with 410 dwellings and 2,474 dwellings for the Tesco application site. It should also be noted that many of the dwellings close to the application site are already within walking distance of the Waitrose store in Welwyn Garden City town centre. So the Tesco store will be less beneficial in terms of improving accessibility for pedestrians than the figures above suggest.

3.30 The disbenefit of the replacement of the Morrison's store with Tesco would be accessibility for residents in the east of Welwyn Garden City and the loss of choice in terms of operators available in the Borough. Existing Morrison's customers who live near to, or to the north or east of, the Morrison's store will have to travel 1.5 kilometres further to visit the Tesco store (a round trip of 3 kilometres). Some of the impact of this additional need to travel could be offset it the Tesco store more successful in generating linked trips to the town centre.

3.31 On balance, we believe the potential closure of the Morrison store would have a negative impact on levels of accessibility to food store on foot, but the impact on car travel and use of public transport will not be significant. The overall impact on shopping trips is addressed below.

Comparison Goods Trade Diversion and Impact

3.32 Again building on NLP's retail study update, we have assessed the comparison goods impact of the proposed Tesco food store.

Base Year 2010 Shopping Patterns

3.33 Base year market shares for comparison goods shopping are shown in Table 4 in Appendix 2. The turnover of comparison facilities in Welwyn Hatfield is estimated to be £349.09 million in 2010. The turnover estimated in 2007 was £361.98 million (deflated to 2009 prices). In real terms the comparison turnover of facilities in Welwyn Hatfield appears to have reduced by 3.6% between 2007 and 2010 due to the effects of the recession.

3.34 The turnover of comparison shopping facilities within nearby neighbourhood centres at Peartree Lane and Woodhall are estimated to be £0.25 million and £0.61 million respectively.

Future Trading Patterns in 2016 – Assuming No Development

3.35 The future turnover of existing comparison shopping facilities in Welwyn Hatfield at 2016 is shown in Table 5 in Appendix 2, which takes into account the enlarged Sainsbury's store in Welwyn Garden City town centre, the Hatfield town centre development and the impact of development in Stevenage. If either of the latter two development are not implemented and trading to full potential by 2016 then the levels of cumulative impact will be lower.

3.36 In total the amount of comparison expenditure attracted to Welwyn Hatfield is expected to increase from £349.09 million in 2010 to £424.82 million in 2016, a 21.7% increase. However not all of this £75.73 million growth will be available for new development.

3.37 About £35 million of the £75.73 million growth will be absorbed by planned investment i.e. Hatfield town centre development and the enlarged Sainsbury's store. Allowing for existing floorspace to increase its turnover efficiency (2% per annum after 2012) we would expect turnover to increase by 8.2% between 2012 and 2016. This is consistent with NLP's retail study update, which suggests surplus comparison expenditure over and above commitments at 2016 will be only £15.28 million.

3.38 The turnover of comparison shopping facilities within Peartree Lane neighbourhood centre is estimated to increase from £0.25 million in 2010 to £0.31 million in 2016. The turnover of comparison shopping facilities within Woodhall neighbourhood centre is estimated to increase from £0.61 million in 2010 to £0.76 million in 2016.

Future Trading Patterns in 2016 – With Proposed Tesco Store

3.39 The expected comparison turnover and trade draw of the proposed Tesco store is shown in Table 6 in Appendix 2. The revised shopping patterns with the Tesco store included are shown in Table 7. The pattern of trade diverted from existing facilities is based on current shopping patterns, the expected trade draw of the Tesco store shown in Table 6, and judgments about the propensity for the Tesco store to compete with non-food shopping facilities.

3.40 The impact results are summarised in Table 8. The highest level of proportional impact (8%) is expected to come from other out-of-centre stores in Welwyn Hatfield (predominantly Tesco and Morrison). The comparison turnover of Welwyn Garden City town centre will reduce from £255.9 million to £245.47 million, an impact of 4.1%. This will include comparison sales within the Waitrose and enlarged Sainsbury's store. Impact on most comparison shops within the town centre is likely to be less than 4.1%.

3.41 The turnover of Welwyn Garden City town centre is expected to increase from £220.01 million in 2010 to £255.90 million in 2016 (£35.89 million growth), allowing for uplift from development in Hatfield. The expanded Sainsbury's store will absorb around £5 million, leaving about £31 million growth. The Tesco store's 1,746 sq m net of comparison sales floorspace is expected to absorb £10.65 million (about 34% of remaining expenditure capacity), leaving about £20 million growth.

3.42 As indicated earlier, we would expect existing comparison floorspace in the town centre to increase its sales density by 8.2% between 2010 and 2016, and this increased turnover efficiency could absorb £18 million growth. DP9 identifies 12 vacant units in Welwyn Garden City town centre (6.4% vacancy rate), which could absorb further growth. These figures suggest the Tesco proposal is unlikely to significantly increase the shop vacancy rate in Welwyn Garden City town centre, but there would be limited additional expenditure growth (around £2 million) to support other investment/development in the town centre up to 2016.

3.43 The cumulative impacts of the enlarged Sainsbury's, developments in Hatfield town centre and the comparison element of the Tesco store will reduce the potential for other development/investment in Welwyn Garden City town centre in the short to medium term e.g. the North Town Centre Development Site.

3.44 Impact on comparison facilities in Hatfield town centre is estimated to be 2.2% (-£1.50 million). The turnover of Hatfield the town centre is expected to increase from £40.91 million in 2010 to £67.46 million in 2016 (£26.55 million growth). This level of projected expenditure growth is expected to offset the impact of the proposed Tesco store.

3.45 Impact on comparison shopping facilities within nearby neighbourhood centres (Peartree and Woodhall) is estimated to be 3.8%. However the residual turnovers of these two centres (£0.29 million and £0.73 million) will still be higher than base year turnover levels in 2010 (£0.25 million and £0.61 million). Trade diversion to the Tesco store will be more than offset by expenditure growth between 2010 and 2016.

Indirect Impact and Linked Shopping Trips

3.46 DP9 has not provided a detailed analysis of the indirect impacts of the proposed food store in terms of linked shopping trips made to the town centre. DP9 suggests these impacts will be positive but limited evidence has been produced to support this. It is difficult to predict the affect on linked trips but we have attempted to assess the potential impact based on available survey information below.

3.47 We believe that the customers diverted from Welwyn Garden City town centre food stores to Tesco are less likely to link their food and grocery shopping trip with other shopping in the town centre, and this will be a negative impact. However, the proposed store will attract new food and grocery shopping trips to Welwyn Garden City that should generate new linked trips not currently made to Welwyn Garden City, which would be a beneficial impact. The balance between these positive and negative impacts needs to be considered.

3.48 The direct impact of the comparison sales within the Tesco store is summarised in Table 8 in Appendix 2, with £10.93 million diverted from the Welwyn Garden City town centre to the Tesco store. The impact on comparison shopping facilities in the town centre is estimated to be 4.1% and a reduction from £255.90 million to £245.47 million. This impact relates to direct trade diversion to the Tesco store. It does not take into account any indirect impact through the reduction or increase in linked shopping trips made to the town centre.

3.49 The Tesco store is expected to divert food and grocery shopping trips from Welwyn Garden City town centre (totalling £11.71 million). Some of these food and grocery trips to the town centre will be combined with other non-food shopping in the town centre, i.e. linked shopping trips. If linked trips are diverted to the Tesco store and customers no longer combine their food and grocery shopping trips with other non-food shopping in the town centre then there could be an indirect impact on comparison shops in the town centre that could be harmful to the vitality and viability of the centre. Conversely, if the Tesco store attracts food and grocery shopping trips from out-of-centre stores and destinations outside Welwyn Garden City there is a possibility the Tesco store will generate new linked trips to Welwyn Garden City town centre. It is necessary to consider these potential positive and negative impacts.

3.50 The 2007 household survey results suggested that 43% of main food shopping trips to stores in Welwyn Garden City town centre were combined with other non-food shopping. For out-of-centre stores in Welwyn Hatfield (e.g. Tesco and Morrison's) the propensity to link trips was lower at 26%. These figures related to main food shopping, but do not include top-up shopping trips. Cleary there is no empirical data on the proportion of linked trips attracted to the proposed Tesco store, but the household survey results and details of the physical linkages from the store to the town centre provide some indication of what may happen in the future.

The Loss of Linked Trips

3.51 If the Tesco store diverts £11.71 million of convenience trade from the town centre. Based on an average spend per trip of £30 per trip, this would represent 390,000 trips per annum lost to the town centre. If 43% of these trips (based on the current average achieved in the town centre from the household survey results) were linked with non-food shopping in the town centre then the town centre could lose about 168,000 non-food shopping trips if the Tesco store is implemented.

3.52 The Tesco store is also expected to divert £5.01 million of convenience trade from the Morrison's store in Welwyn Garden City. Based on an average spend per trip of £30 per trip, this would represent 167,000 trips per annum. If 26% of these trips (based on the current average achieved by out of centre stores from the household survey) were linked with non-food shopping in the town centre then this trade would result in 43,000 existing linked trips being diverted to the proposed Tesco store. Trade diversion from the Tesco store in Hatfield is estimated to be £12.19 million, or 406,000 trips per annum. Assuming 26% linked trips diverted to Tesco is about 106,000 trips, but not all of these trips would go to Welwyn Garden City town centre. It seems reasonable to assume a 50:50 split between Welwyn Garden City town centre and Hatfield town centre (53,000 linked trips each).

3.53 Based on the figures above the number of diverted linked shopping trips from Welwyn Garden City town centre could be 264,000 trips per annum.

The Gain in Linked Trips

3.54 The convenience turnover of the Tesco store is estimated to be £37.17 million. This could represent 1,239,000 trips in total assuming an average spend of £30 per trip.

3.55 An out-of-centre store on the application site with relatively poor links to the town centre and 1,739 sq m net of comparison sales will generate a lower proportion of linked shopping trips to Welwyn Garden City town centre than existing food stores in the town centre, e.g. Sainsbury's, Waitrose, Marks &

Spencer and Iceland. But the proposed Tesco store should generate the same proportional amount of linked trips to Welwyn Garden City town centre when compared with the out-of-centre Morrison and Tesco stores. This is supported by recent research published by the School of geography at the University of Southampton in Town & Country Planning – October 2009, contained within DP9 retail statement.

3.56 Based on the household survey results it reasonable to assume 26% of all trips (the existing average for out-of-centre stores) made to the proposed Tesco store will be linked with non-food shopping in Welwyn Garden City town centre. We believe it would be difficult to argue the proposed Tesco store will generate proportionally less linked trips than existing out-of-centre stores in Welwyn Hatfield. On this basis the proposed Tesco store would generate 322,000 trips per annum linked with non-food shopping in Welwyn Garden City town centre.

The Net Change in Linked Trips

3.57 The number of diverted linked shopping trips from Welwyn Garden City town centre to the Tesco store is estimated to be 264,000 trips per annum. However some of these diverted food and grocery shopping trips will continue to be linked with non-food shopping in the town centre. Furthermore, the proposed Tesco will attract new linked shopping trips to Welwyn Garden City town centre i.e. trips currently made to out-of-centre stores and stores outside Welwyn Hatfield. In total we estimate the Tesco store should generate 322,000 linked trips.

3.58 On this basis there would be a net gain in linked shopping trips to Welwyn Garden City town centre (58,000 linked trips per annum i.e. 322,000 minus 264,000).

3.59 These figures are based on household survey results for main food shopping trips only. Linked top up food shopping trips in the town centre are likely to be higher than 43% and therefore the loss of linked trips could be higher than 264,000 trips per annum. A sensitivity analysis is shown below:

- 43% town centre linked trips = 264,000 lost trips;
- 50% town centre linked trips = 291,000 lost trips;
- 55% town centre linked trips = 311,000 lost trips;
- 60% town centre linked trips = 330,000 lost trips;
- 65% town centre linked trips = 350,000 lost trips;

3.60 If the existing proportion of food and grocery shopping linked trips to the town centre is between 55% to 60% then the impact of the Tesco store on linked trips (main and top up) is likely to be neutral i.e. the loss in linked trips (311,000 to 330,000) will be offset by the gain in linked trips (322,000).

3.61 In our view the impact of the Tesco store on linked trips to the town centre is likely to be neutral, and this is neither a benefit nor disbenefit of the proposed food store.

3.62 The impact on non-food shops and services in the town centre could be minimised by ensuring the proposed food store encourages linked shopping trips. We recommend that if the Council is minded to approve the food store that the permission is conditioned to:

- restrict the maximum amount of sales floorspace permitted to not more than 4,646 sq m net;
- restrict the maximum amount of comparison sales floorspace permitted to not more than 1,739 sq m net;
- the exclusion of concessions and franchises i.e. a post office counter, hairdressers, dry cleaners, bank, opticians etc.
- the exclusion of a dispensing chemist in the development.

Wider Impacts

3.63 As indicated above, the retail impact of the proposed food store is not on its own expected to have a significant adverse impact on Welwyn Garden City town centre. This relates to PPS4 Policy EC16.1 (a, b, d, e and f).

3.64 The Council must also consider the impact of the proposal in terms of Policy EC10 and Policy EC16.1c. The application site is an allocated development site outside the town centre (as specified in EC16.1c). The Council must consider whether the application proposals are in accordance with the allocation and development plan, and if not the impact the proposal would have on the development plan needs to be considered. Non-compliance with the allocation and development plan could be considered to be a significant adverse impact. This issue has not been addressed by NLP.

3.65 PPS4 indicates (Policy EC17) that where no significant adverse impacts are identified, the positive and negative impacts of the proposal should still be considered along with other material considerations.

Job Creation

3.66 The food store proposal is expected to generate 400 jobs. This employment figure seems reasonable for a food superstore of the size proposed.

3.67 Most of the proposed Tesco store’s turnover is expected to be diverted from other retail facilities in Welwyn Hatfield. The convenience turnover of existing facilities in Welwyn Hatfield is expected to reduce from £231.29 million to £199.18 million in 2016 (a 14% reduction). The number of employees within food stores is directly related to the amount of trade generated by the store. Staffing levels are determined by the need to re-stock shelves, process/cook food and operate checkouts. If a food store loses nearly 14% of its turnover then it is inevitable that staff numbers will be reduced in order to cut costs and maintain profit levels.

3.68 We estimate that about 86% of the Tesco store’s convenience turnover will be diverted from other facilities in Welwyn Hatfield, therefore about 14% will be new trade attracted to Welwyn Hatfield. Allowing for diverted jobs from existing facilities in Welwyn Hatfield, the net increase in jobs in Welwyn Hatfield generated by the food store may only be about 50 to 60 jobs.

Customer Choice and Over-trading

3.69 The proposed Tesco store will provide more choice and competition in terms of large food stores in within Welwyn Garden City, but only if all existing food stores remain trading. The Morrison store appears to be the most vulnerable to closure. Any benefits of additional choice provided by the Tesco store will be lost if the Morrison store were to close.

3.70 Our figures suggest existing food stores in Welwyn Garden City will be trading below expected levels in 2016 with the new Sainsbury store implemented. There is no evidence of over-trading or congestion within existing stores. The proposed Tesco store will provide limited benefits in terms of reducing congestion within existing stores.

Impact on Shopping Trips and Car Travel

3.71 The proposed Tesco store is expected to change food shopping patterns. There is no clear evidence to suggest the store will result in a reduction in trip lengths due to the claw back of expenditure leakage from Welwyn Garden City’s catchment area.

3.72 As indicated above, 86% of the Tesco store’s turnover is expected to be diverted from existing food stores in Welwyn Hatfield and there is unlikely to be a significant change in the length of trip undertaken by customers i.e. an increase or decrease. We believe it is reasonable to assume the impact in terms of trip lengths will be neutral. However a more important issue will be modal shift i.e. will the Tesco store encourage customers to change to or from car travel.

3.73 The Tesco store is expected to divert abut 60% of its trade from out-of-centre food stores (Tesco and Morrison’s) or stores outside Welwyn Hatfield. It is unlikely these diverted trips will result in a significant modal shift. Most of the existing trips are likely to be car borne and will remain so after they are diverted to Tesco.

3.74 Of the remaining 40%, about 2% is estimated to be diverted from local shops. Some of these diverted trips could result in a shift from walking customers to car borne trips. The remaining 38% is estimated to be diverted from Welwyn Garden City and Hatfield town centres. These town centres are likely to be more accessible by foot and by bus than the application site, and it is possible some of the diverted trips to Tesco will result in a modal shift away from walking and bus towards car use.

3.75 The household survey results suggest 82% of main food shopping trips are by car, and 75% of non-food shopping trips are car borne. The on-street survey results indicated that 53% of visitors to Welwyn Garden City and Hatfield town centres travelled by car (NB – this includes visitors not undertaking shopping in the centres). These survey results suggest customers using food stores within town centres are more likely to walk or go by public transport than customers visiting out of centre food stores.

3.76 The potential modal shift caused by the proposed Tesco store should be carefully considered. In our view the impact of the Tesco store on modal shift is likely to be negative i.e. with some customers moving from walking and bus to car borne trips.

3.77 The negative impacts of the proposal (e.g. impact on convenience shops in the town centre and any other site specific impacts) should be weighted against the benefits of the proposal in terms of job creation (net change taking into account any lost employment), increase in competition and consumer choice, regeneration and the impacts on car travel (trips lengths and modal split).

3.78 A high proportion of the proposed Tesco store's turnover is expected to be diverted from out-of-centre large food stores e.g. Morrisons and Tesco and other towns. Trade diversion from other out-of-centre food stores is not a planning consideration in PPS4. However if an out-of-centre store was forced to close then the benefits of the proposed new store in terms of improved choice and competition would be lost.

4.0 Sequential Approach

Policy Considerations

4.1 The checklist for adopting the sequential approach as set out at paragraph 6.52 of the PPS4 Practice Guidance is as follows:

1 What is the scale and form of development needed?

2 Is the need location site specific or more generalised?

3 Are the PSA and wider town centre properly defined in the development plan?

4 How is the proposal site in question defined (in, edge or out of centre)?

5 Have all more central opportunities been considered?

6 Have all the alternatives been thoroughly tested having regard to the identified need and timescale over which it arises?

7 Has this assessment adopted a sufficiently flexible approach?

8 Has the potential to overcome any obstacle to availability of more central sites been discussed with the LPA?

Scale, Need and Flexibility

4.2 **Points 1 and 7** listed from the PPS4 Practice Guidance are linked. The proposal seeks to provide a new Tesco food store to improve the convenience offer in Welwyn Hatfield. It is necessary to consider whether the scale of the proposed store is the only way to meet the need the proposal seeks to address. It should be noted the applicant is not required to demonstrate their proposals are needed, but the PPS4 Practice Guidance suggests an applicant must demonstrate the need cannot be met in sequentially preferable locations, allowing for flexibility and the scope for disaggregation. PPS4 and the Practice Guidance are not entirely clear what approach should be adopted in relation to the sequential approach when a clear need for the development proposal has not been demonstrated. Nevertheless, PPS4 suggests applicants most be flexible in terms of the scale of store proposed and the amount of car parking.

4.3 Point 7 of the PPS4 Guide indicates the applicant must clearly demonstrate flexibility and the potential for disaggregation. It is necessary to consider what need the proposal (and the proposed business model) will meet, and the applicant must explain why this need cannot be met within existing centres, after flexibility and the scope for disaggregation of the goods sold have been demonstrated.

4.4 DP9 argues disaggregation of the proposed store is not appropriate because physically separating the proposed new floorspace would not address the specific need for the proposal. It is necessary to carefully consider the need the food store proposed is expected to address.

4.5 Large food stores often provide a range and choice of comparison items, e.g. goods regularly bought during weekly food and grocery shopping trips such as health/beauty goods, medicine, kitchen utensils, household goods, greetings cards and flowers. Other higher order comparison goods, such as TVs/large or high value electrical goods and clothing/fashion items, are not essential to a food store's primary role as a food and grocery shopping destination. A food store operator will typically sell of greeting cards, stationery, pharmaceutical goods and toiletries, and the sale of these types of goods should not normally be disaggregated.

4.6 Over 37% of the proposed sales floorspace (1,739 sq m net) will be devoted to the sale of comparison goods. In our view the provision of 1,739 sq m net of comparison sales is reasonably large for ancillary non-food sales. The provision of over 1,700 sq m net of comparison sales is above the level that is necessary for ancillary non-food sales one would normally expect to find within a food superstore.

4.7 A store with a smaller amount of comparison sales floorspace could provide items one would normally expect to find in most large food stores, e.g. goods regularly bought during weekly food and grocery shopping trips such as health/beauty goods, medicine, kitchen utensils, household goods, greetings cards and flowers. Other higher order comparison goods, such as TVs/large or high value electrical goods and clothing/fashion items, are not essential to a store's role as a food and grocery shopping destination, and the needs of customers can be met by other forms of shopping. Customers purchasing these type of goods will normally compare goods within a number of shops/stores before they buy, and the concentration of a number of outlets selling similar goods in one location (i.e. town centres) is beneficial to customers and operators. This type of shopping behaviour demonstrates that the type of goods sold is critical when considering the sequential approach. Some comparison goods can be disaggregated and accommodated in other formats and types of retailing.

4.8 Tesco has a number of different business models, and in this case we do not believe they have demonstrated the proposed business model is necessary to provide the benefits suggested. Furthermore, the applicant has not demonstrated that other forms of development on sequentially preferable sites cannot meet the need for additional comparison retail floorspace. Part of the comparison element of the proposal could be disaggregated and the need for this additional floorspace can be met by other types of retailing on more central sites. The applicant has not provided a breakdown of how the proposed comparison sales floorspace will be used, therefore it is not possible to fully explore the scope for disaggregation.

4.9 Notwithstanding the scope for disaggregation, it is also necessary to consider whether the proposed business model (a food store with a sales area of over 4,600 sq m net) can be accommodated on sequentially preferable sites. A store of this size could be provided on two levels with multi-level car parking.

The PPS4 Practice Guide provides as useful case study of retailer flexibility by Asda at Halesowen (a 6,970 sq m gross food store with a sales area of 4,587 sq m net).

4.10 The Institute of Grocery Distribution's Directory of Food Stores 2009 indicates Tesco has 403 food superstores (over 2,500 sq m net) across the Country, of which 176 are Tesco Extra stores. The average sales floorspace for the remaining 227 superstores is about 3,600 sq m net. The proposed Tesco store in Welwyn Garden City (4,646 sq m net) is above the Tesco average for non-Extra superstores across the country.

4.11 DP9 suggests the size of the proposed store cannot be reduced because it would not compete effectively with current retailers, nor would it claw back trade from out-of-centre stores. We do not accept a store of over 4,600 sq m net is the only way the identified need can be met. Further food stores in a town do not have to be the same size to compete. The Tesco store will be considerably larger than the Waitrose (2,300 sq m), Morrison (2,926 sq m net) and the enlarged Sainsbury's store (3,200 sq m net) in Welwyn garden City. The store is also larger than the Asda store (4,146 sq m) in Hatfield town centre, and DP9's estimate of trade diversion from this store is small (£1.09 million) i.e. limited benefits in terms of expenditure claw back.

4.12 We do not believe the applicant has demonstrated appropriate flexibility in terms of the size of store. For example, if the proposed store's net sales area was reduced to say 2,500 sq m net (about 4,000 sq m gross) then the store with decked car parking could be accommodated on a site of around 0.6 to 0.7 hectares.

4.13 In terms of **Point 2** above, the proposal is not site specific, because other sites in Welwyn Hatfield could potentially meet the identified need. DP9 own figures demonstrate convenience floorspace in Welwyn Garden City town centre will be trading 2.8% below benchmark in 2016 (£68.57 million compared with the benchmark turnover of £70.56 million). The Morrisons store will be trading 18% below benchmark. Convenience floorspace in Hatfield town centre will be trading 9.6% below benchmark (£41.26 million compared with £45.62 million). The quantitative need does not appear to relate to either Welwyn Garden City or Hatfield town centres.

4.14 DP9 suggests the Tesco store on the northern edge of Hatfield will be trading 68% above benchmark in 2016. The Tesco store is positioned between Welwyn Garden City and Hatfield and serves both towns. In qualitative terms access to food store provision is superior in Welwyn Garden City when compared with Hatfield, particularly with the enlarged Sainsbury's store. In our view sites in both Welwyn Garden City and Hatfield town centres should be considered under the sequential approach, because the need does not relate exclusively to one town only.

The Site's Location and Town Centre Designations

4.15 PPS4 indicates that proposals for retail development on sites outside existing centres will only be permitted if the sequential approach to site selection has been undertaken. It states that a failure to demonstrate a sequential approach has been applied will justify the refusal of planning permission.

4.16 The PPS4 Practice Guide states that adopting a sequential approach to selecting sites means wherever possible seeking to focus new development within, or failing that on well located sites on the edge of existing defined centres. Only if town centre or edge of centre sites are not available, will out of centre locations be likely to be appropriate in policy terms, provided that they are well served by alternative means of transport, and are acceptable in all other respects including impact.

4.17 DP9 indicates the Tesco store is located on an edge of centre site 250 metres from the defined Welwyn Garden City town centre. The proposed Tesco store may be 250 metres from the town centre as the crow flies, but the shortest pedestrian route to the proposed food store entrance from the nearest part of the town centre is over 300 metres. In addition distance is not the only consideration and edge of centre sites should be well connected to the town centre. In our view the site is not well connected to the town centre. PPS4 indicates barriers for pedestrians should be taken into account. In this case the railway line and foot bridge is a significant barrier.

4.18 In our view the proposed Tesco food store is will operate as an out-of-centre rather than an edge of centre store **(Point 4)**. Notwithstanding the Tesco store's location as edge-of-centre or out-of-centre, PPS4 indicates applicants with edge-of-centre should explore the suitability of other edge-of-centre sites that are better connected to the town centre.

Site Availability

4.19 The PPS4 Practice Guidance indicates that all the alternative sites must be tested having regard to the identified need and timescale within which it arises **(Point 6)**. All sites that have potential to be available by 2016 should be considered. The applicant should also explore the potential to overcome any obstacle to availability of more central sites with the LPA **(Point 8)**.

Analysis of Alternative Sites

4.20 In our view the proposed food store is in an out-of-centre location, due to its distance and poor connectivity to the town centre. The applicant must consider all potential sites within and on the edge of the town centre. All sites that could provide a new food store by 2016 should be considered.

4.21 DP9 has undertaken a sequential assessment of sites within Welwyn Garden City and Hatfield town centre. In order to validate DP9's analysis, points 5, 6 and 8 of the PPS4 Practice Guidance are relevant.

4.22 DP9 has assessed six alternative sites in Welwyn Garden City and one in Hatfield town centre, as follows:

1 Town Centre North Development Site (TCR4) – John Lewis car park;

2 Campus East Development Site (TCR5) – Upper ad Lower;

3 Southern side of the Town Centre (TCR6) – Sainsbury's;

4 Osborn Way Car Park;

5 Rosanne House offices and apartments;

6 Campus West;

7 Eastern end of Hatfield Town Centre (TCR14).

Town Centre North Development Site (TCR4)

4.23 DP9 suggests this site is about 0.9ha but John Lewis is unlikely to relinquish the car park therefore the site is unavailable. The allocated site is larger than this at about 1.4ha. DP9 also suggest the site is unviable for a food store but no evidence is provided to support this. The site is considered by DP9 to be unsuitable primarily due to impact on the conservation area and the inadequate size of the site.

4.24 It appears reasonable to conclude that the site is unsuitable for a large food store of say 4,000 sq m gross. The allocated site is more likely to accommodate comparison shopping.

Campus East Development Site (TCR5)

4.25 This site is about 2.2ha in size of which about 1ha is occupied by Waitrose. A site of around 1.2ha is theoretically available for development. The site is allocated for development in the District Plan. In our view this development allocation on its own does not prove the site is available for food store development within a reasonable period of time and it is still necessary to consider any obstacles to development.

4.26 We understand the developable land (1.2ha) is owned by the Council. If the site is to be considered to be available for a food store development within a reasonable period of time then the Council would need be prepared to release the site to a food store operator.

4.27 Notwithstanding the Council willingness to release the site for a food store development, there are other issues relating to the suitability and viability of the site for a food store that need to be considered. The current linkages to the town centre and absence of main road frontage need to be considered as they may affect the site's viability and suitability for a food store. DP9 argues the "limited and indirect" pedestrian route from the northern part of the site to the town centre makes the site unsuitable.

4.28 We understand BDP carried out work for the Council (in connection with the District Plan) illustrating how a more legible pedestrian route could be achieved on land owned by the Council in between the Council Offices and the Waitrose store, helping to link this area into the town centre, and we understand it is likely that an SPD for Welwyn Garden City would incorporate measures to provide improved pedestrian access to this part of the town centre. In our view the existing pedestrian route to the town centre (i.e. to the rear of the Waitrose store) is not ideal but it still provides less of an obstacle to pedestrians then the railway bridge route to the application site.

4.29 The quality of pedestrian routes to the site does not on its own make the site unsuitable or unviable for a food store development, and there is clearly potential to improve these linkages on land owned by the Council.

4.30 The site is also considered to be unviable by DP9 for a food store. The basis for this conclusion appears to be the presence of Waitrose, the lack of frontage and the cost of providing more than one level of car parking. DP9 suggest a food store would fail in this location. DP9 has provided no evidence to suggest the need to retain public car parking would make the development of the site unviable. It is possible additional decked parking could be provided on site, or alternatively a replacement public car park would need to be provided elsewhere.

4.31 Based on NLP's own site visits, we believe the absence of main road frontage is the main issue affecting the site's suitability and viability. The potential development area is obscured from Bridge Road by the Waitrose store and the decked car parking adjacent to the Waitrose store. It is obscured from The Campus by the Council offices and the Police Station. Due to this lack of main road frontage we believe the development of the site in isolation would be unviable for a food store operator, and on this basis we agree with DP9's conclusion that a food store would fail in this location.

Southern side of the Town Centre (TCR6)

4.32 The Sainsbury's site is currently being redeveloped to provide an enlarged Sainsbury's store. The site is unavailable to Tesco.

Osborn Way Car Park

4.33 The site is considered by DP9 to be unavailable because it is used for commuter car parking (about 400 surface spaces). The site is not allocated for development in the Local Plan. The site is too small to accommodate a food store with a sales area of 4,646 sq m net, but as indicated earlier we do not believe the applicant has demonstrated appropriate flexibility.

4.34 We understand the Council owns this site but much of the car park is leased to Network Rail for railway station-related car parking. Therefore redevelopment will require Network Rail's co-operation and the re-provision of station related car parking nearby or on-site. However this site can only be considered to be available if Network Rail is willing to co-operate and relinquish its lease.

4.35 The site is long and narrow (about 40 metres by 240 metres). The limited width of the site will constrain the size of store than can be physically accommodated. We believe a store of 35 metres by 70 metres could be accommodated on the site, i.e. about 2,500 sq m gross (about 1,600 sq m net). This store could have surface car parking (about 200 space) if alternative station car parking is replaced off-site, or alternatively decked car parking would need to be provided on site (about 600 spaces would need to be provided, probably at least three decks).

4.36 In our view this scale of Tesco store in this location would be unviable, because it would be too small to adequately compete with larger food store in Welwyn Hatfield. In these circumstances a store of only 1,600 sq m net is above and beyond what might be considered to be appropriate flexibility. Furthermore, if this site is to be successfully considered to be an alternative to the application site at appeal then the Council must establish Network Rail's willingness to accept alternative car parking arrangements either decked on site or alternative off-site parking.

Rosanne House offices and apartments

4.37 DP9 indicates this site is unavailable due to current uses on the site. In our view the site is too small for a large food store of 4,000 sq m gross.

Campus West

4.38 DP9 indicates this site is unavailable due to current uses on the site, i.e. leisure facilities and car parking. DP9 suggests the design solution to provide a food store on the suite would be challenging. Based on NLP's own site visits this site is unlikely to be suitable for a food store development.

Eastern end of Hatfield Town Centre (TCR14)

4.39 This opportunity has been discounted by DP9 because they consider the redevelopment of the site is not moving forward, and is therefore unavailable. They do not anticipate the site will be delivered within a reasonable period of time. The Council must consider whether the redevelopment of the site can be delivered within the next five years.

4.40 A redevelopment including a large anchor food store could be viable on the site, but the Council would need to consider whether this form of development would meet the regeneration aspirations for Hatfield town centre, given that the centre already has a large Asda store, which acts as a food anchor.

5.0 # Summary and Key Considerations

Methodology

5.1 DP9 may have overestimated the amount of convenience goods expenditure available to support new floorspace in Welwyn Garden City. We have concerns regarding DP9's expected distribution of trade diversion to the proposed store, i.e. the relatively low level of trade diversion from Welwyn Garden City town centre. To address these issues we have undertaken our own independent retail impact assessment.

The Need for the Development

5.2 PPS4 removes the need test but expenditure capacity is relevant in terms of the assessment of impact. It is also relevant in establishing the weight attributed to benefits the new store would bring.

Retail and Wider Impacts

5.3 PPS4 (EC17) states that if a proposal is likely to lead to a significant adverse impact, whether on its own or cumulatively, it should be refused. Where there is no significant adverse impact, the local planning authority is required to determine an application taking account of the positive and negative impacts of the proposal and any other material considerations. This relates not only to retail impact but impact in the wider sense as set out in PPS4 Policies EC10 and EC16. This report only reviews in detail retail impacts under policy EC16.

5.4 The retail impacts of the proposal relate to Policy EC16 of PPS4. The analysis in this report suggests the retail impacts identified under EC16.1 a, b and d are negative. It is necessary for the Council to consider whether these negative impacts are in isolation or taken together significant. We have not considered the Policy EC10 impacts of the development in this report.

5.5 If the Council believes the retail and wider impacts of the proposal are not significant then it is necessary to consider all the positive and negative impacts as set out in EC17.2.

5.6 We believe the net increase in food store related jobs has been over-stated by DP9, and is likely to be about 50-60 jobs. This is a positive benefit of the store, provided existing stores do not close.

5.7 In terms of trip lengths, there is no evidence to suggest the Tesco store will result in a reduction in trips lengths, and this impact is likely to be neutral. The impact in terms of modal shift is a more important issue and this is likely to be negative.

The Sequential Approach

5.8 In our view the proposed food store is out-of-centre. All in-centre and edge of centre sites should be considered.

5.9 The only opportunity in Welwyn Garden City town centre that appears to be physically capable of accommodating and potentially suitable for a food superstore (about 4,000 sq m gross) is the Campus East site. The Osborn Way car park could in theory accommodate a large store of about 2,500 sq m gross.

5.10 Both these sites are in the Council's ownership, and the availability of both sites depends on the Council's willingness to release the sites for food store development. The availability of the Osborn Way car park site is also dependant on Network Rail's cooperation.

5.11 Even if the Council is prepared to release one of these two sites, we would question their viability for food store development. The Campus East site has inadequate main road frontage, which will make a food store unviable on the site.

5.12 The Osborn Way car park site is narrow and cannot accommodate a viable food store capable of competing with a number of much larger food stores in Welwyn Hatfield. In our view this site can also be discounted on viability grounds, regardless of its availability or suitability.

5.13 Based on current information available there appear to be no sequentially preferable alternative sites for a large food store.

Appendix 1 – Convenience Goods Impact

Convenience Floorspace and Benchmark Turnover (2009 prices)

Town	Store	Net Sales Floorspace Sq M	Convenience % Sales Floorspace	Convenience Floorspace Sq M Net	Turnover Density £ per Sq M	Total Convenience Turnover £M
Welwyn Garden City						
	Sainsbury's, Church Road (pre-extended)*	1,596	95%	1,516	£12,359	£18.74
	Waitrose, Bridge Road	2,300	90%	2,070	£12,948	£26.80
	Marks and Spencer, Howard Centre	943	100%	943	£10,835	£10.22
	Iceland, Fretherne Road	500	95%	475	£6,874	£3.27
	Welwyn other convenience shops	900	100%	900	£4,000	£3.60
	Morrisons, Black Fan Road	2,926	85%	2,487	£12,689	£31.56
	Welwyn Garden City Total	**9,165**		**8,391**		**£94.18**
Hatfield						
	Asda, Town Centre	4,146	60%	2,488	£13,571	£33.76
	Iceland, Town Centre	530	95%	504	£6,874	£3.46
	Hatfield other convenience shops	735	100%	735	£4,000	£2.94
	Aldi, Hatfield	780	70%	546	£7,094	£3.87
	Tesco, Great North Way, Oldings Corner	5,889	60%	3,533	£12,948	£45.75
	Hatfield Total	**12,080**		**7,806**		**£89.78**
Large Neighbourhood Centres	Co-op, Roe Green Centre, Roe Green	202	100%	202	£8,959	£1.81
	One Stop, High View	251	100%	251	£4,000	£1.00
	Lidl, Moors Walk	790	85%	672	£7,094	£4.76
	Co-op, Hall Grove	154	100%	154	£8,959	£1.38
	Somerfield, Cole Green Lane, Woodhall	449	95%	427	£8,959	£3.82
	Alldays, Cole Green Lane, Woodhall	148	100%	148	£4,000	£0.59
	Other Large Neighbourhood Centres	784	100%	784	£4,000	£3.14
	Large Neighbourhood Centres Total	**2,778**		**2,637**		**£16.51**
Small Neighbourhood Centres	Co-op, Homestead Road, Birchwood	193	100%	193	£8,959	£1.73
	One Stop, Peatree Lane, Peartree	134	100%	134	£4,000	£0.54
	Other Small Neighbourhood Centres	1,600	100%	1,600	£4,000	£6.40
	Small Neighbourhood Centres Total	**1,927**		**1,927**		**£8.67**
Large/Small Village Centres	Co-op, Station Road, Cuffley	142	100%	142	£8,959	£1.27
	Tesco Express, Cuffley	193	100%	193	£12,948	£2.50
	Tesco Express, High Street, Welwyn	175	100%	175	£12,948	£2.27
	Alldays, Bradmore Green, Brookmans Park	140	100%	140	£4,000	£0.56
	Other Village Centres	600	100%	600	£4,000	£2.40
	Village Centres Total	**1,250**		**1,250**		**£9.00**
	GRAND TOTAL	**27,200**		**22,011**	**£9,910**	**£218.14**
		Comparison Sales Floorspace in Food Stores Sq M Net				**5,189**

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

* Sainsbury's post extended = £27.68 million
3,200 sq m net 70% conveneince goods (2,240 sq m net)

Table 1 : Population Projections

Zone Area	2010	2016
1 - Welwyn Garden City	48,022	48,786
2 - Hatfield	40,552	41,198
3 - Welwyn North	25,667	26,525
4 - St Albans (Rural)	26,916	27,269
5 - Potters Bar	29,555	30,492
6 - Hertford	22,379	23,359
7 - Stevenage (Urban)	77,033	78,360
8 - Harpenden	25,179	25,509
9 - St Albans (Urban)	59,113	59,889
	354,417	**361,387**

Table 2: Convenience Goods Expenditure Per Capita (2009 Prices)

Expenditure Per Capita	2010	2016
1 - Welwyn Garden City	£1,716	£1,738
2 - Hatfield	£1,600	£1,620
3 - Welwyn North	£1,989	£2,014
4 - St Albans (Rural)	£1,842	£1,865
5 - Potters Bar	£1,890	£1,914
6 - Hertford	£1,801	£1,824
7 - Stevenage (Urban)	£1,724	£1,746
8 - Harpenden	£1,864	£1,888
9 - St Albans (Urban)	£1,772	£1,795

Sources:

Experian local estimates for 2009 convenience goods expenditure per capita
(Excluding special forms of trading)
Experian Business Strategies - recommended forecast growth rates up 2012
Utlta long term growth trend adopted after 2012 (0.5% per annum).

Table 3: Total Available Convenience Goods Expenditure (£M - 2009 Prices)

Zone	2010	2016
1 - Welwyn Garden City	£82.42	£84.78
2 - Hatfield	£64.86	£66.72
3 - Welwyn North	£51.05	£53.41
4 - St Albans (Rural)	£49.58	£50.86
5 - Potters Bar	£55.87	£58.36
6 - Hertford	£40.31	£42.61
7 - Stevenage (Urban)	£132.81	£136.79
8 - Harpenden	£46.94	£48.15
9 - St Albans (Urban)	£104.77	£107.48
Total	**£628.62**	**£649.16**

Sources: *Table 1 and Table 2*

Table 4: **2010 Base Year Convenience Shopping Penetration Rates**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow
Welwyn Garden City										
Sainsbury's	8.0%	0.0%	3.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Waitrose	15.0%	2.0%	15.0%	2.0%	2.0%	2.0%	0.0%	0.0%	0.0%	8.0%
Other town centre	6.0%	1.0%	4.0%	0.0%	0.0%	1.0%	1.0%	0.0%	1.0%	5.0%
Peartree Lane NC	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Somerfield, Woodhall	4.3%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Other Woodhall NC	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Morrisons, Blackfan Road	22.0%	2.0%	4.5%	0.0%	1.0%	7.0%	0.0%	1.0%	0.0%	5.0%
Hatfield										
Asda	4.0%	30.0%	0.0%	8.0%	1.0%	2.0%	0.0%	1.0%	3.0%	5.0%
Other town centre	0.0%	6.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%
Tesco, Hatfield	25.0%	34.0%	13.5%	14.0%	1.0%	4.0%	1.0%	6.0%	4.0%	10.0%
Local shopping Welwyn/Hatfield	10.8%	12.8%	17.0%	1.0%	5.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Welwyn Hatfield Sub-Total	**97.0%**	**88.0%**	**57.0%**	**26.0%**	**10.0%**	**16.0%**	**2.0%**	**8.0%**	**8.0%**	**n/a**
St Albans	1.0%	7.0%	1.0%	55.0%	11.0%	0.0%	0.0%	2.0%	80.0%	n/a
Stevenage	1.0%	1.0%	28.0%	0.0%	1.0%	10.0%	89.0%	1.0%	0.0%	n/a
Potters Bar	0.0%	3.0%	0.0%	0.0%	64.0%	1.0%	0.0%	0.0%	0.0%	n/a
Watford	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	1.0%	n/a
Luton	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%	n/a
Hertford	0.0%	0.0%	0.0%	0.0%	0.0%	62.0%	0.0%	0.0%	0.0%	n/a
Harpenden	0.0%	0.0%	4.0%	7.0%	0.0%	0.0%	0.0%	81.0%	1.0%	n/a
Other Outflow	1.0%	1.0%	8.0%	11.0%	14.0%	11.0%	9.0%	5.0%	10.0%	n/a
Other Sub-Total	**3.0%**	**12.0%**	**43.0%**	**74.0%**	**90.0%**	**84.0%**	**98.0%**	**92.0%**	**92.0%**	**n/a**
Market Share Total	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***n/a***

Source: *Market shares based on NEMS household survey 2007 with DP9 adjustments to reflect changes since 2007*

Table 5: **Base Year Convenience Expenditure 2010 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total Expend
Expenditure 2010	**£82.42**	**£64.86**	**£51.05**	**£49.58**	**£55.87**	**£40.31**	**£132.81**	**£46.94**	**£104.77**		**£628.62**
Welwyn Garden City											
Sainsbury's	£6.59	£0.00	£1.53	£0.50	£0.00	£0.00	£0.00	£0.00	£0.00	£0.45	£9.07
Waitrose	£12.36	£1.30	£7.66	£0.99	£1.12	£0.81	£0.00	£0.00	£0.00	£2.11	£26.34
Other town centre	£4.95	£0.65	£2.04	£0.00	£0.00	£0.40	£1.33	£0.00	£1.05	£0.55	£10.96
Peartree Lane NC	£0.74	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.02	£0.76
Somerfield, Woodhall	£3.54	£0.13	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.07	£3.75
Other Woodhall NC	£0.82	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.02	£0.84
Morrisons, Black Fan Road	£18.13	£1.30	£2.30	£0.00	£0.56	£2.82	£0.00	£0.47	£0.00	£1.35	£26.92
Hatfield											
Asda	£3.30	£19.46	£0.00	£3.97	£0.56	£0.81	£0.00	£0.47	£3.14	£1.67	£33.37
Other town centre	£0.00	£3.89	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.12	£4.01
Tesco, Hatfield	£20.61	£22.05	£6.89	£6.94	£0.56	£1.61	£1.33	£2.82	£4.19	£7.44	£74.44
Local shopping Welwyn/Hatfield	£8.90	£8.30	£8.68	£0.50	£2.79	£0.00	£0.00	£0.00	£0.00	£0.60	£29.77
Welwyn Hatfield Sub-Total	**£79.95**	**£57.08**	**£29.10**	**£12.89**	**£5.59**	**£6.45**	**£2.66**	**£3.76**	**£8.38**	**£14.39**	**£220.24**
St Albans	£0.82	£4.54	£0.51	£27.27	£6.15	£0.00	£0.00	£0.94	£83.82	n/a	£124.05
Stevenage	£0.82	£0.65	£14.29	£0.00	£0.56	£4.03	£118.20	£0.47	£0.00	n/a	£139.03
Potters Bar	£0.00	£1.95	£0.00	£0.00	£35.75	£0.40	£0.00	£0.00	£0.00	n/a	£38.10
Watford	£0.00	£0.00	£0.00	£0.50	£0.00	£0.00	£0.00	£0.00	£1.05	n/a	£1.54
Luton	£0.00	£0.00	£1.02	£0.00	£0.00	£0.00	£0.00	£1.41	£0.00	n/a	£2.43
Hertford	£0.00	£0.00	£0.00	£0.00	£0.00	£24.99	£0.00	£0.00	£0.00	n/a	£24.99
Harpenden	£0.00	£0.00	£2.04	£3.47	£0.00	£0.00	£0.00	£38.02	£1.05	n/a	£44.58
Other Outflow	£0.82	£0.65	£4.08	£5.45	£7.82	£4.43	£11.95	£2.35	£10.48	n/a	£48.04
Other Sub-Total	**£2.47**	**£7.78**	**£21.95**	**£36.69**	**£50.28**	**£33.86**	**£130.16**	**£43.18**	**£96.39**	n/a	**£422.77**
Total	**£82.42**	**£64.86**	**£51.05**	**£49.58**	**£55.87**	**£40.31**	**£132.81**	**£46.94**	**£104.77**	n/a	**£643.01**

Source: *Table 3 and 4*

Table 6: **2016 Convenience Shopping Penetration Rates (with enlarged Sainsbury - Without Tesco)**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow
Welwyn Garden City										
Sainsbury's	18.9%	4.6%	10.1%	2.0%	1.0%	0.0%	0.0%	0.0%	0.0%	8.0%
Waitrose	12.9%	1.9%	13.4%	2.0%	2.0%	2.0%	0.0%	0.0%	0.0%	8.0%
Other town centre	5.8%	1.0%	3.9%	0.0%	0.0%	1.0%	1.0%	0.0%	1.0%	5.0%
Peartree Lane NC	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Somerfield, Woodhall	4.2%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Other Woodhall NC	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Morrisons, Black Fan Road	18.4%	1.8%	3.6%	0.0%	1.0%	7.0%	0.0%	1.0%	0.0%	5.0%
Hatfield										
Asda	3.8%	29.4%	0.0%	8.0%	1.0%	2.0%	0.0%	1.0%	3.0%	5.0%
Other town centre	0.0%	6.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%
Tesco, Hatfield	21.0%	30.9%	12.0%	14.0%	1.0%	4.0%	1.0%	6.0%	4.0%	10.0%
Local shopping Welwyn/Hatfield	10.4%	12.8%	17.0%	1.0%	5.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Welwyn Hatfield Sub-Total	**97.3%**	**88.6%**	**60.0%**	**27.0%**	**11.0%**	**16.0%**	**2.0%**	**8.0%**	**8.0%**	**n/a**
St Albans	0.9%	6.6%	0.9%	54.0%	10.6%	0.0%	0.0%	2.0%	80.0%	n/a
Stevenage	0.9%	0.9%	25.8%	0.0%	0.9%	10.0%	89.0%	1.0%	0.0%	n/a
Potters Bar	0.0%	3.0%	0.0%	0.0%	63.5%	1.0%	0.0%	0.0%	0.0%	n/a
Watford	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	1.0%	n/a
Luton	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%	n/a
Hertford	0.0%	0.0%	0.0%	0.0%	0.0%	62.0%	0.0%	0.0%	0.0%	n/a
Harpenden	0.0%	0.0%	3.7%	7.0%	0.0%	0.0%	0.0%	81.0%	1.0%	n/a
Other Outflow	0.9%	0.9%	7.6%	11.0%	14.0%	11.0%	9.0%	5.0%	10.0%	n/a
Other Sub-Total	**2.7%**	**11.4%**	**40.0%**	**73.0%**	**89.0%**	**84.0%**	**98.0%**	**92.0%**	**92.0%**	**n/a**
Market Share Total	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***n/a***

Source: *Market shares based on NEMS household survey 2007 with DP9 adjustments to reflect changes since 2007*

Table 7: **2016 Convenience Shopping Shopping Patterns (with enlarged Sainsbury - Without Tesco)**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total Expend
Expenditure 2016	**£84.78**	**£66.72**	**£53.41**	**£50.86**	**£58.36**	**£42.61**	**£136.79**	**£48.15**	**£107.48**		**£649.16**
Welwyn Garden City											
Sainsbury's	£16.02	£3.07	£5.39	£1.02	£0.58	£0.00	£0.00	£0.00	£0.00	£2.27	£28.36
Waitrose	£10.94	£1.27	£7.16	£1.02	£1.17	£0.85	£0.00	£0.00	£0.00	£1.95	£24.35
Other town centre	£4.92	£0.67	£2.08	£0.00	£0.00	£0.43	£1.37	£0.00	£1.07	£0.55	£11.09
Peartree Lane NC	£0.76	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.02	£0.78
Somerfield, Woodhall	£3.56	£0.13	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£3.77
Other Woodhall NC	£0.85	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.02	£0.87
Morrisons, Blackfan Road	£15.60	£1.20	£1.92	£0.00	£0.58	£2.98	£0.00	£0.48	£0.00	£1.20	£23.97
Hatfield											
Asda	£3.22	£19.62	£0.00	£4.07	£0.58	£0.85	£0.00	£0.48	£3.22	£1.69	£33.74
Other town centre	£0.00	£4.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.12	£4.13
Tesco, Hatfield	£17.80	£20.62	£6.41	£7.12	£0.58	£1.70	£1.37	£2.89	£4.30	£6.98	£69.77
Local shopping Welwyn/Hatfield	£8.82	£8.54	£9.08	£0.51	£2.92	£0.00	£0.00	£0.00	£0.00	£0.61	£30.47
Welwyn Hatfield Sub-Total	**£82.50**	**£59.12**	**£32.05**	**£13.73**	**£6.42**	**£6.82**	**£2.74**	**£3.85**	**£8.60**	**£15.47**	**£231.29**
St Albans	£0.76	£4.40	£0.48	£27.46	£6.19	£0.00	£0.00	£0.96	£85.98	n/a	£126.24
Stevenage	£0.76	£0.60	£13.78	£0.00	£0.53	£4.26	£121.75	£0.48	£0.00	n/a	£142.16
Potters Bar	£0.00	£2.00	£0.00	£0.00	£37.06	£0.43	£0.00	£0.00	£0.00	n/a	£39.49
Watford	£0.00	£0.00	£0.00	£0.51	£0.00	£0.00	£0.00	£0.00	£1.07	n/a	£1.58
Luton	£0.00	£0.00	£1.07	£0.00	£0.00	£0.00	£0.00	£1.44	£0.00	n/a	£2.51
Hertford	£0.00	£0.00	£0.00	£0.00	£0.00	£26.42	£0.00	£0.00	£0.00	n/a	£26.42
Harpenden	£0.00	£0.00	£1.98	£3.56	£0.00	£0.00	£0.00	£39.00	£1.07	n/a	£45.61
Other Outflow	£0.76	£0.60	£4.06	£5.59	£8.17	£4.69	£12.31	£2.41	£10.75	n/a	£49.34
Other Sub-Total	**£2.29**	**£7.61**	**£21.36**	**£37.13**	**£51.94**	**£35.79**	**£134.06**	**£44.30**	**£98.88**	n/a	**£433.35**
Total	**£84.78**	**£66.72**	**£53.41**	**£50.86**	**£58.36**	**£42.61**	**£136.79**	**£48.15**	**£107.48**	n/a	**£664.64**

Source: *Table 3 and 6*

Table 8: **Proposed Tecso Convenience Goods Turnover and Trade Draw 2016**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
% of Turnover fom each zone	53.0%	8.6%	19.0%	4.1%	2.4%	5.4%	0.0%	0.0%	0.0%	7.5%	**100.0%**
trade draw £millions	£19.70	£3.20	£7.06	£1.52	£0.89	£2.01	£0.00	£0.00	£0.00	£2.79	**£37.17**

Source: *DP9 turnover and trade draw assumptions in study area*

Table 9: **2016 Convenience Shopping Shopping Patterns (with enlarged Sainsbury - Without Tesco)**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total Expend
Expenditure 2016	**£84.78**	**£66.72**	**£53.41**	**£50.86**	**£58.36**	**£42.61**	**£136.79**	**£48.15**	**£107.48**		**£649.16**
Welwyn Garden City											
Tesco, Broadwater Road East	£19.70	£3.20	£7.06	£1.52	£0.89	£2.01	£0.00	£0.00	£0.00	£2.79	£37.17
Sainsbury's	£10.89	£2.89	£4.22	£0.97	£0.56	£0.00	£0.00	£0.00	£0.00	£1.88	£21.42
Waitrose	£8.49	£1.21	£5.98	£0.98	£1.14	£0.79	£0.00	£0.00	£0.00	£1.70	£20.29
Other town centre	£4.45	£0.65	£1.91	£0.00	£0.00	£0.41	£1.37	£0.00	£1.07	£0.52	£10.38
Peartree Lane NC	£0.72	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.02	£0.73
Somerfield, Woodhall	£3.33	£0.13	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£3.54
Other Woodhall NC	£0.81	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.02	£0.83
Morrisons, Black Fan Road	£11.60	£1.13	£1.50	£0.00	£0.56	£2.68	£0.00	£0.48	£0.00	£0.99	£18.96
Hatfield											
Asda	£2.50	£18.63	£0.00	£3.90	£0.57	£0.78	£0.00	£0.48	£3.22	£1.43	£31.51
Other town centre	£0.00	£3.92	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.12	£4.03
Tesco, Hatfield	£11.53	£19.00	£4.48	£6.65	£0.56	£1.47	£1.37	£2.89	£4.30	£5.34	£57.58
Local shopping Welwyn/Hatfield	£8.59	£8.48	£8.83	£0.51	£2.91	£0.00	£0.00	£0.00	£0.00	£0.60	£29.91
Welwyn Hatfield Sub-Total	**£82.62**	**£59.25**	**£33.99**	**£14.52**	**£7.19**	**£8.12**	**£2.74**	**£3.85**	**£8.60**	**£15.47**	**£236.35**
St Albans	£0.71	£4.34	£0.43	£26.80	£6.08	£0.00	£0.00	£0.96	£85.98	n/a	£125.31
Stevenage	£0.71	£0.59	£12.27	£0.00	£0.52	£4.04	£121.75	£0.48	£0.00	n/a	£140.37
Potters Bar	£0.00	£1.94	£0.00	£0.00	£36.44	£0.40	£0.00	£0.00	£0.00	n/a	£38.79
Watford	£0.00	£0.00	£0.00	£0.50	£0.00	£0.00	£0.00	£0.00	£1.07	n/a	£1.57
Luton	£0.00	£0.00	£1.01	£0.00	£0.00	£0.00	£0.00	£1.44	£0.00	n/a	£2.45
Hertford	£0.00	£0.00	£0.00	£0.00	£0.00	£25.41	£0.00	£0.00	£0.00	n/a	£25.41
Harpenden	£0.00	£0.00	£1.76	£3.47	£0.00	£0.00	£0.00	£39.00	£1.07	n/a	£45.31
Other Outflow	£0.74	£0.60	£3.95	£5.56	£8.14	£4.63	£12.31	£2.41	£10.75	n/a	£49.07
Other Sub-Total	**£2.17**	**£7.47**	**£19.42**	**£36.33**	**£51.17**	**£34.48**	**£134.06**	**£44.30**	**£98.88**	**n/a**	**£428.28**
Total	**£84.78**	**£66.72**	**£53.41**	**£50.86**	**£58.36**	**£42.61**	**£136.79**	**£48.15**	**£107.48**	**n/a**	**£664.64**

Source: *Table 3 and 6*

Table 10: Convenience Impact Summary (£ Millions)

	2010	2016 With Sainsbury	2016 With Tesco	2016 Trade diversion	2016 % Impact	Benchmark Turnover	% Trading Benchmark
Welwyn Garden City							
Tesco, Broadwater Road East	n/a	n/a	£37.17	£37.17	n/a	£37.64	98.8%
Sainsbury's	£9.07	£28.36	£21.42	-£6.94	-24.5%	£27.68	77.4%
Waitrose	£26.34	£24.35	£20.29	-£4.06	-16.7%	£26.80	75.7%
Other town centre	£10.96	£11.09	£10.38	-£0.71	-6.4%	£17.09	60.7%
Welwyn Town Centre Sub-Total	£46.38	£63.80	£52.09	-£11.71	-18.4%	£71.57	72.8%
Peartree Lane NC	£0.76	£0.78	£0.73	-£0.04	-5.6%	£0.64	114.8%
Somerfield, Woodhall	£3.75	£3.77	£3.54	-£0.23	-6.0%	£3.82	92.7%
Other Woodhall NC	£0.84	£0.87	£0.83	-£0.04	-4.4%	£0.80	103.4%
Morrisons, Black Fan Road	£26.92	£23.97	£18.96	-£5.01	-20.9%	£31.56	60.1%
Hatfield							
Asda	£33.37	£33.74	£31.51	-£2.22	-6.6%	£33.76	93.3%
Other town centre	£4.01	£4.13	£4.03	-£0.09	-2.3%	£6.40	63.0%
Tesco, Hatfield	£74.44	£69.77	£57.58	-£12.19	-17.5%	£45.75	125.9%
Local shopping Welwyn/Hatfield	£29.77	£30.47	£29.91	-£0.56	-1.8%	£38.05	78.6%
Welwyn Hatfield Sub-Total	**£220.24**	**£231.29**	**£199.18**	**-£32.10**	**-13.9%**	**£232.35**	**85.7%**
St Albans	£124.05	£126.24	£125.31	-£0.93	-0.7%	n/a	n/a
Stevenage	£139.03	£142.16	£140.37	-£1.79	-1.3%	n/a	n/a
Potters Bar	£38.10	£39.49	£38.79	-£0.70	-1.8%	n/a	n/a
Watford	£1.54	£1.58	£1.57	-£0.01	-0.8%	n/a	n/a
Luton	£2.43	£2.51	£2.45	-£0.06	-2.3%	n/a	n/a
Hertford	£24.99	£26.42	£25.41	-£1.01	-3.8%	n/a	n/a
Harpenden	£44.58	£45.61	£45.31	-£0.30	-0.7%	n/a	n/a
Other Outflow	£48.04	£49.34	£49.07	-£0.27	-0.5%	n/a	n/a
Other Sub-Total	**£422.77**	**£433.35**	**£428.28**	**-£5.07**	**n/a**	**n/a**	**n/a**
Total	**£643.01**	**£664.64**	**£627.47**	**-£37.17**	**n/a**	**n/a**	**n/a**

Appendix 2 – Comparison Retail Impact

Table 1 : Population Projections

Zone Area	2010	2016
1 - Welwyn Garden City	48,022	48,786
2 - Hatfield	40,552	41,198
3 - Welwyn North	25,667	26,525
4 - St Albans (Rural)	26,916	27,269
5 - Potters Bar	29,555	30,492
6 - Hertford	22,379	23,359
7 - Stevenage (Urban)	77,033	78,360
8 - Harpenden	25,179	25,509
9 - St Albans (Urban)	59,113	59,889
	354,417	**361,387**

Table 2: Comparison Goods Expenditure Per Capita (2009 Prices)

Expenditure Per Capita	2010	2016
1 - Welwyn Garden City	£2,556	£3,128
2 - Hatfield	£2,455	£3,003
3 - Welwyn North	£3,234	£3,957
4 - St Albans (Rural)	£2,972	£3,636
5 - Potters Bar	£2,953	£3,613
6 - Hertford	£2,853	£3,491
7 - Stevenage (Urban)	£2,553	£3,123
8 - Harpenden	£3,017	£3,691
9 - St Albans (Urban)	£2,869	£3,510

Sources:

Experian local estimates for 2009 comparison goods expenditure per capita
(Excluding special forms of trading)
Experian Business Strategies - recommended forecast growth rates up to 2012
Ultra Long term growth rate of 4.7% after 2012.

Table 3: Total Available Comparison Goods Expenditure (£M - 2009 Prices)

Zone	2010	2016
1 - Welwyn Garden City	£122.77	£152.59
2 - Hatfield	£99.55	£123.73
3 - Welwyn North	£83.01	£104.95
4 - St Albans (Rural)	£80.00	£99.16
5 - Potters Bar	£87.28	£110.16
6 - Hertford	£63.85	£81.54
7 - Stevenage (Urban)	£196.65	£244.74
8 - Harpenden	£75.97	£94.16
9 - St Albans (Urban)	£169.58	£210.19
Total	**£978.65**	**£1,221.21**

Sources: *Table 1 and Table 3*

Table 4: **Comparison Shopping Penetration Rates and Available Expenditure 2010**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expenditure
Expenditure 2010	**£122.77**	**£99.55**	**£83.01**	**£80.00**	**£87.28**	**£63.85**	**£196.65**	**£75.97**	**£169.58**	**n/a**	**£978.65**
Market Share											
Welwyn Garden City town centre	60%	24%	32%	14%	16%	20%	5%	21%	6%	10%	
Hatfield town centre	7%	21%	1%	5%	4%	1%	0%	1%	1%	0%	
Peartree Neighbourhood Centre	0.2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Woodhall Neighbourhood Centre	0.5%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Neighbourhood/Village Centres	0.3%	4%	3%	1%	2%	4%	0%	2%	2%	0%	
Hatfield Galleria	3%	7%	3%	3%	2%	0%	1%	2%	1%	40%	
Out-of-centre stores	9%	8%	3%	4%	5%	1%	0%	0%	0%	10%	
Welwyn Hatfield Sub-Total	**80%**	**64%**	**42%**	**27%**	**29%**	**26%**	**6%**	**26%**	**10%**	**n/a**	
St Albans	3%	10%	3%	47%	4%	1%	1%	17%	62%	n/a	
Potters Bar	0%	1%	0%	0%	17%	0%	0%	0%	0%	n/a	
Watford	1%	2%	0%	5%	3%	0%	1%	4%	9%	n/a	
Luton	0%	1%	4%	4%	0%	0%	1%	19%	1%	n/a	
London Colney	0%	4%	1%	7%	11%	1%	1%	2%	7%	n/a	
Stevenage	10%	10%	30%	2%	2%	17%	81%	2%	1%	n/a	
Other outflow	6%	8%	20%	8%	34%	55%	9%	30%	10%	n/a	
Other Sub-Total	**20%**	**36%**	**58%**	**73%**	**71%**	**74%**	**94%**	**74%**	**90%**	**n/a**	
TOTAL MARKET SHARE	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***	
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**	**Inflow Expend.**	**Total £M**
Turnover £M											
Welwyn Garden City town centre	£73.66	£23.89	£26.56	£11.20	£13.96	£12.77	£9.83	£15.95	£10.17	£22.00	£220.01
Hatfield town centre	£8.59	£20.91	£0.83	£4.00	£3.49	£0.64	£0.00	£0.76	£1.70	£0.00	£40.91
Peartree Neighbourhood Centre	£0.25	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.25
Woodhall Neighbourhood Centre	£0.61	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.61
Neighbourhood/Village Centres	£0.37	£3.98	£2.49	£0.80	£1.75	£2.55	£0.00	£1.52	£3.39	£0.00	£16.85
Hatfield Galleria	£3.68	£6.97	£2.49	£2.40	£1.75	£0.00	£1.97	£1.52	£1.70	£14.98	£37.45
Out-of-centre stores	£11.05	£7.96	£2.49	£3.20	£4.36	£0.64	£0.00	£0.00	£0.00	£3.30	£33.01
Welwyn Hatfield Sub-Total	**£98.21**	**£63.71**	**£34.86**	**£21.60**	**£25.31**	**£16.60**	**£11.80**	**£19.75**	**£16.96**	**£40.28**	**£349.09**
St Albans	£3.68	£9.95	£2.49	£37.60	£3.49	£0.64	£1.97	£12.91	£105.14	n/a	£177.88
Potters Bar	£0.00	£1.00	£0.00	£0.00	£14.84	£0.00	£0.00	£0.00	£0.00	n/a	£15.83
Watford	£1.23	£1.99	£0.00	£4.00	£2.62	£0.00	£1.97	£3.04	£15.26	n/a	£30.10
Luton	£0.00	£1.00	£3.32	£3.20	£0.00	£0.00	£1.97	£14.43	£1.70	n/a	£25.61
London Colney	£0.00	£3.98	£0.83	£5.60	£9.60	£0.64	£1.97	£1.52	£11.87	n/a	£36.01
Stevenage	£12.28	£9.95	£24.90	£1.60	£1.75	£10.85	£159.29	£1.52	£1.70	n/a	£223.84
Other outflow	£7.37	£7.96	£16.60	£6.40	£29.67	£35.12	£17.70	£22.79	£16.96	n/a	£160.57
Other Sub-Total	**£24.55**	**£35.84**	**£48.14**	**£58.40**	**£61.97**	**£47.25**	**£184.85**	**£56.22**	**£152.62**	**n/a**	**£669.84**
TOTAL TURNOVER	**£122.77**	**£99.55**	**£83.01**	**£80.00**	**£87.28**	**£63.85**	**£196.65**	**£75.97**	**£169.58**	**£40.28**	**£1,018.93**

Sources: *NEMS Household and Street Surveys 2007 and DP9 adjustments*

Table 5: **Comparison Shopping Penetration Rates and Available Expenditure 2016 (without Tesco Development)**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow	Total Expenditure
Expenditure 2016	**£152.59**	**£123.73**	**£104.95**	**£99.16**	**£110.16**	**£81.54**	**£244.74**	**£94.16**	**£210.19**	**n/a**	**£1,221.21**
Market Share											
Welwyn Garden City town centre	57%	22%	30%	13%	15%	19%	3%	21%	6%	10%	
Hatfield town centre	9%	27%	2%	7%	6%	2%	0%	1%	1%	0%	
Peartree Neighbourhood Centre	0.2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Woodhall Neighbourhood Centre	0.5%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Neighbourhood/Village Centres	0.3%	4%	3%	1%	2%	4%	0%	2%	2%	0%	
Hatfield Galleria	3%	5%	3%	3%	2%	0%	1%	2%	1%	40%	
Out-of-centre stores	8%	6%	3%	4%	5%	1%	0%	0%	0%	10%	
Welwyn Hatfield Sub-Total	**78%**	**64%**	**41%**	**28%**	**30%**	**26%**	**4%**	**26%**	**10%**	**n/a**	
St Albans	2%	9%	3%	43%	4%	1%	1%	17%	61%	n/a	
Potters Bar	0%	1%	0%	0%	15%	0%	0%	0%	0%	n/a	
Watford	1%	2%	0%	5%	3%	0%	1%	4%	9%	n/a	
Luton	0%	1%	4%	4%	0%	0%	1%	19%	1%	n/a	
London Colney	0%	4%	1%	7%	11%	1%	1%	2%	7%	n/a	
Stevenage	13%	12%	34%	5%	4%	20%	90%	3%	2%	n/a	
Other outflow	6%	7%	17%	8%	33%	52%	2%	29%	10%	n/a	
Other Sub-Total	**22%**	**36%**	**59%**	**72%**	**70%**	**74%**	**96%**	**74%**	**90%**	**n/a**	
TOTAL MARKET SHARE	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***	
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**	**Inflow Expend.**	**Total £M**
Turnover £M											
Welwyn Garden City town centre	£86.97	£27.22	£31.48	£12.89	£16.52	£15.49	£7.34	£19.77	£12.61	£25.59	£255.90
Hatfield town centre	£13.73	£33.41	£2.10	£6.94	£6.61	£1.63	£0.00	£0.94	£2.10	£0.00	£67.46
Peartree Neighbourhood Centre	£0.31	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.31
Woodhall Neighbourhood Centre	£0.76	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.76
Neighbourhood/Village Centres	£0.46	£4.95	£3.15	£0.99	£2.20	£3.26	£0.00	£1.88	£4.20	£0.00	£21.10
Hatfield Galleria	£4.58	£6.19	£3.15	£2.97	£2.20	£0.00	£2.45	£1.88	£2.10	£17.02	£42.54
Out-of-centre stores	£12.21	£7.42	£3.15	£3.97	£5.51	£0.82	£0.00	£0.00	£0.00	£3.67	£36.74
Welwyn Hatfield Sub-Total	**£119.02**	**£79.19**	**£43.03**	**£27.76**	**£33.05**	**£21.20**	**£9.79**	**£24.48**	**£21.02**	**£46.28**	**£424.82**
St Albans	£3.05	£11.14	£3.15	£42.64	£4.41	£0.82	£2.45	£16.01	£128.22	n/a	£211.87
Potters Bar	£0.00	£1.24	£0.00	£0.00	£16.52	£0.00	£0.00	£0.00	£0.00	n/a	£17.76
Watford	£1.53	£2.47	£0.00	£4.96	£3.30	£0.00	£2.45	£3.77	£18.92	n/a	£37.39
Luton	£0.00	£1.24	£4.20	£3.97	£0.00	£0.00	£2.45	£17.89	£2.10	n/a	£31.84
London Colney	£0.00	£4.95	£1.05	£6.94	£12.12	£0.82	£2.45	£1.88	£14.71	n/a	£44.92
Stevenage	£19.84	£14.85	£35.68	£4.96	£4.41	£16.31	£220.26	£2.82	£4.20	n/a	£323.33
Other outflow	£9.16	£8.66	£17.84	£7.93	£36.35	£42.40	£4.89	£27.31	£21.02	n/a	£175.56
Other Sub-Total	**£33.57**	**£44.54**	**£61.92**	**£71.39**	**£77.11**	**£60.34**	**£234.95**	**£69.68**	**£189.17**	**n/a**	**£842.67**
TOTAL TURNOVER	**£152.59**	**£123.73**	**£104.95**	**£99.16**	**£110.16**	**£81.54**	**£244.74**	**£94.16**	**£210.19**	**£46.28**	**£1,267.49**

Table 6: **Proposed Tecso Comparison Trade Draw 2016**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
% of Turnover fom each zone	53.0%	8.6%	19.0%	4.1%	2.4%	5.4%	0.0%	0.0%	0.0%	7.5%	**100.0%**
trade draw £millions	£10.21	£1.66	£3.66	£0.79	£0.46	£1.04	£0.00	£0.00	£0.00	£1.45	**£19.27**

Source: *DP9 turnover and trade draw assumptions in study area*

Table 7: **Comparison Shopping Penetration Rates and Available Expenditure 2016 (with Tesco Development)**

Centre/Facilities	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**	**% Inflow**	**Total Expenditure**
Expenditure 2016	**£152.59**	**£123.73**	**£104.95**	**£99.16**	**£110.16**	**£81.54**	**£244.74**	**£94.16**	**£210.19**	**n/a**	**£1,221.21**
Turnover £M											
Tesco Broadwater West	£10.21	£1.66	£3.66	£0.79	£0.46	£1.04	£0.00	£0.00	£0.00	£1.45	£19.27
Welwyn Garden City town centre	£80.30	£26.67	£29.86	£12.73	£16.42	£15.16	£7.34	£19.77	£12.61	£24.60	£245.47
Hatfield town centre	£12.94	£32.90	£2.02	£6.88	£6.58	£1.60	£0.00	£0.94	£2.10	£0.00	£65.96
Peartree Neighbourhood Centre	£0.29	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.29
Woodhall Neighbourhood Centre	£0.73	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.73
Neighbourhood/Village Centres	£0.44	£4.94	£3.15	£0.99	£2.20	£3.25	£0.00	£1.88	£4.20	£0.00	£21.05
Hatfield Galleria	£4.40	£6.12	£3.11	£2.97	£2.20	£0.00	£2.45	£1.88	£2.10	£16.85	£42.08
Out-of-centre stores	£10.33	£7.12	£2.82	£3.87	£5.44	£0.78	£0.00	£0.00	£0.00	£3.39	£33.76
Welwyn Hatfield Sub-Total	**£119.66**	**£79.41**	**£44.62**	**£28.22**	**£33.30**	**£21.84**	**£9.79**	**£24.48**	**£21.02**	**£46.28**	**£428.62**
St Albans	£2.99	£11.08	£3.07	£42.37	£4.39	£0.81	£2.45	£16.01	£128.22	n/a	£211.38
Potters Bar	£0.00	£1.23	£0.00	£0.00	£16.47	£0.00	£0.00	£0.00	£0.00	n/a	£17.70
Watford	£1.50	£2.46	£0.00	£4.93	£3.29	£0.00	£2.45	£3.77	£18.92	n/a	£37.31
Luton	£0.00	£1.23	£4.09	£3.94	£0.00	£0.00	£2.45	£17.89	£2.10	n/a	£31.70
London Colney	£0.00	£4.92	£1.02	£6.90	£12.08	£0.81	£2.45	£1.88	£14.71	n/a	£44.77
Stevenage	£19.46	£14.77	£34.76	£4.93	£4.39	£16.13	£220.26	£2.82	£4.20	n/a	£321.74
Other outflow	£8.98	£8.62	£17.38	£7.88	£36.24	£41.95	£4.89	£27.31	£21.02	n/a	£174.27
Other Sub-Total	**£32.93**	**£44.32**	**£60.33**	**£70.94**	**£76.86**	**£59.70**	**£234.95**	**£69.68**	**£189.17**	**n/a**	**£838.87**
TOTAL TURNOVER	**£152.59**	**£123.73**	**£104.95**	**£99.16**	**£110.16**	**£81.54**	**£244.74**	**£94.16**	**£210.19**	**£46.28**	**£1,267.49**

Table 8: Summary of Comparison Expenditure/Floorspace Projections

	2010	2016 Without Tesco	2016 With Tesco	2016 Trade diversion	2016 % Impact
Tesco Broadwater West	n/a	n/a	£19.27	£19.27	n/a
Welwyn Garden City town centre	£220.01	£255.90	£245.47	-£10.44	-4.1%
Hatfield town centre	£40.91	£67.46	£65.96	-£1.50	-2.2%
Peartree Neighbourhood Centre	£0.25	£0.31	£0.29	-£0.01	-3.8%
Woodhall Neighbourhood Centre	£0.61	£0.76	£0.73	-£0.03	-3.8%
Neighbourhood/Village Centres	£16.85	£21.10	£21.05	-£0.04	-0.2%
Hatfield Galleria	£37.45	£42.54	£42.08	-£0.46	-1.1%
Out-of-centre stores	£33.01	£36.74	£33.76	-£2.99	-8.1%
Welwyn Hatfield Sub-Total	**£349.09**	**£424.82**	**£428.62**	**-£15.47**	
St Albans	£177.88	£211.87	£211.38	-£0.49	-0.2%
Potters Bar	£15.83	£17.76	£17.70	-£0.06	-0.3%
Watford	£30.10	£37.39	£37.31	-£0.08	-0.2%
Luton	£25.61	£31.84	£31.70	-£0.14	-0.4%
London Colney	£36.01	£44.92	£44.77	-£0.14	-0.3%
Stevenage	£223.84	£323.33	£321.74	-£1.59	-0.5%
Other outflow	£160.57	£175.56	£174.27	-£1.30	-0.7%
Other Sub-Total	**£669.84**	**£842.67**	**£838.87**	**-£3.80**	
TOTAL TURNOVER	**£1,018.93**	**£1,267.49**	**£1,267.49**	**-£19.27**	