Councils Response to Inspectors Initial Questions Friday 24th May 2019

12. Question 12

Does the Plan set out what the expected future level of demand for retail floorspace is over Plan period? If so [i] where is this and [ii] what evidence is it based upon?

12.1. [i] The evidence suggests that the quantitative expected future level of demand for retail floorspace closely equates to the existing level of provision (including commitments). This is implicitly (though not explicitly) set out in the Plan in policies L12 – Centres for retail, services and leisure and policy and L16 - Mixed Use Opportunity Areas. There is a qualitative demand/need for support for the vitality and viability of existing retail areas.

12.2. Policy L12 focuses on enhancing and protecting town, district and local centres. This includes new centres established in the Broad Locations.

12.3. Policy L16 is aimed at supporting mixed use in specific opportunity areas, including Griffiths Way. Development and redevelopment is encouraged, given it enhances the city's central area vitality and viability.

12.4. Vacancy rates within the designated centres will be monitored and reported on an annual basis through the **Authority's Monitoring Report (AMR 001)** and the policy will be reviewed 5 years after the adoption of the plan.

12.5. [ii] The approach taken is primarily informed by evidence from the **South West Hertfordshire Retail and Leisure Study 2018 (LCRT 001 a), b) and c),** linked below**,** and guidance from the NPPF**.** These are linked below:

https://www.stalbans.gov.uk/Images/South%20West%20Hertfordshire%20Retail%20and%20Leisure%20Study%20-%20Part%201-%20Final%20Draft_tcm15-66977.pdf

https://www.stalbans.gov.uk/Images/South%20West%20Hertfordshire%20Retail%20and%20Leisure%20Study%20-%20Part%202%20-%20Final%20Draft_tcm15-66978.pdf

https://www.stalbans.gov.uk/Images/South%20West%20Hertfordshire%20Retail%20and%20Leisure%20Study%20-%20Part%203%20-%20Final%20Draft_tcm15-66979.pdf

12.6. As a very brief summary of the most directly relevant parts of those documents, they set out:

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9.86 Our forecasts for St Albans show only modest convenience goods capacity at 2026 of up to 2,900 sqm under the most populous forecast, increasing to up to 4,800 sq m net by 2031. The District is characterised by a very large proportion of its convenience (and comparison) goods floorspace being met within St Albans and Harpenden, as well as at a range of Local Centres. Those stores are surveyed, on the whole, to trade very well. In the particular case of Harpenden, where there is currently no significant out-of-centre retail provision, we consider the Waitrose and Sainsbury's stores to be fundamental footfall generators and that their trade is essential to the on-going vitality and viability of the town centre. Whilst St Albans itself does have an out-of-centre Sainsbury's store (which over-trades by c£20m), it has a recent commitment for a further out-of-centre foodstore, close to the existing Sainsbury's, at Griffiths Way South (1,921 sq m net). We consider that there is therefore no pressing qualitative need to allocate specific large sites for convenience retail development in St Albans over the next 10 years, and that the capacity identified should be envisaged to support the day-to-day requirements of smaller convenience goods retailers,

together perhaps, with providing small-scale Local Centre type floorspace to accompany any major planned urban extensions.

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9.87 Turning to comparison goods capacity, we show there to be no capacity headroom for additional floorspace until 2031 under each of the population scenarios. This is due to a combination of the sizable commitment for a further 4,800 sq m net of comparison goods floorspace at Griffiths Way South, together with our reduced market share assumption (as with Hertsmere), that St Albans is likely to experience a reduction of around 9% of its current comparison goods market share as a result of its proximity to a range of planned developments in Luton, and permitted developments at Brent Cross. Accordingly, we recommend that the Council adopts a cautious approach to comparison goods capacity. It should also regularly monitor the health of St Albans City Centre once the Griffiths Way South developments have completed and established themselves.