

**St Albans City & District Council
Retail and Leisure Study**

January 2006

PREPARED BY

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Quality Standards Control

The signatories below verify that this document has been prepared in accordance with our quality control requirements. These procedures do not affect the content and views expressed by the originator.

This document must only be treated as a draft unless it has been signed by the Originator and approved by a Business or Associate Director.

Date
January 2006

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Limitations

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

1 INSTRUCTIONS AND OUTLINE OF REPORT

1.1 In May 2005 St Albans City and District Council commissioned GL Hearn (GLH) to prepare a Retail and Leisure Assessment for St Albans District, the findings of which will be used to prepare the retail policies of the emerging Local Development Framework.

1.2 The Retail Assessment was commissioned on 4 May 2005 and was completed in November 2005. The Assessment's findings have been subject to critical review by officers of the City and District Council and also by members of the Planning Policy Advisory Panel.

Purpose of the Assessment

1.3 The aim of the Assessment is to form the evidential basis of the town centre, retail and leisure elements to the core strategy and to guide site allocations and development control policies of the emerging Local Development Framework and to provide guidance for considering planning applications and proposals for retail and leisure development within the District.

1.4 The specific project requirements of St Albans City and District Council can be summarised as follows:

- a) An overview of current national, regional and local planning policy guidance in relation to retail and leisure development;
- b) An analysis of recent and future retailing and leisure trends in both the national, regional, sub-regional and local context;
- c) Extent of the existing and future retail catchment areas (including population and geographical extent) of convenience and comparison goods;
- d) Current and forecast levels of retail expenditure available (convenience and comparison) that are actually being spent within the St Albans and Harpenden sub areas;
- e) Assessment of current and forecast retail turnover figures for existing centres and stores;
- f) Utilising company average turnover figures, assessment of the extent to which existing centres and stores are over and undertrading at present;

- g) An assessment of the “leakage” of expenditure in the existing catchment areas, and analysis of why this occurring and to which rival centres it is being lost;
- h) An overall assessment of quantitative retail and leisure need, together with the results of the household survey;
- i) Health check analysis for the St Albans and Harpenden sub-areas (to include seven neighbourhood centres);
- j) Analysis of shopper attitudes, accessibility issues etc from the household survey results;
- k) Assessment of whether there are any areas of the district not adequately provided for in terms of day to day convenience shopping provision;
- l) Information on retailer demand;
- m) Commentary on the impact that e-tailing is having or will have on shopping patterns and turnover; and
- n) Commentary on the growth in discount food retailing and whether this type of floorspace should be viewed differently to traditional convenience floorspace when assessing quantitative and qualitative need for further convenience store provision;

Scope of Work

1.5 In order to fulfil the requirements of the study brief, GL Hearn has:

- Reviewed the St Albans City & District Retail Need Assessment 2001-2016 (November 2000) prepared by Vincent and Gorbings;
- Considered the St Albans City & District Local Plan (November 1994); and
- Considered other relevant background documents including the Draft East of England Plan (RSS14);

1.6 In addition, the study has involved carrying out the following original research:

- i) Preparation of a “desk top” overview of current national, regional and local planning policy guidance;

- ii) Preparation of a “*desk top*” overview of current and potential future trends in convenience and comparison goods retailing and leisure activities using recognised research sources;
- iii) A household shopping survey, consisting of 1,014 telephone based interviews of residents living within the District and its immediate hinterland, in order to establish current patterns of expenditure and attitudes regarding leisure and shopping behaviour within the District by the respondent;
- iv) An In-street survey of 300 shoppers carried out within St Albans City Centre and an In-street survey of 208 shoppers carried out within Harpenden Town Centre in order to identify patterns and attitudes relating to the use of these centres;
- v) A detailed audit to assess the current levels of vitality and viability displayed by both St Albans City Centre and Harpenden Town Centre and each of the seven neighbourhood centres; and
- vi) Meetings with the St Albans City Centre Management Board and representatives of Harpenden Town Council.

Structure of the Report

- 1.7 The remainder of the report is structured as follows:

Section 2:

- 1.8 Incorporates an overview of current national, regional and local planning policy guidance in relation to retail and leisure development.

Section 3:

- 1.9 Incorporates an overview of current and likely shopping trends at both the national, regional, sub-regional and local level which may have an influence on the need, and demand for new retail floorspace.

Section 4:

- 1.10 Provides an overview of the current status of e-commerce and its likely implications for future retail trends.

Section 5:

- 1.11 Considers the role and function of discount goods retailing.

Section 6:

- 1.12 Provides a detailed description of the retailer and business survey undertaken in St Albans City Centre and Harpenden Town Centre.

Section 7:

- 1.13 Provides a summary of the shoppers' survey undertaken in St Albans City Centre and Harpenden Town Centre.

Section 8:

- 1.14 Sets out the findings of our assessment on the health of St Albans City Centre.

Section 9:

- 1.15 Sets out the findings of our assessment on the health of Harpenden Town Centre.

Section 10:

- 1.16 Sets out the findings of our assessment of the health of the seven neighbourhood centres.

Section 11:

- 1.17 Provides a description of the current patterns of retail spending in the convenience (food) and comparison (non-food) sectors and the patterns of leisure visits based on the results of the comprehensive survey of 1,014 households resident in the District and its surrounding hinterland.

Section 12:

- 1.18 Sets out the quantitative aspects of our assessment of retail capacity and need under various scenarios, taking into account major development commitments within St Albans District and elsewhere in the region, and the change in the level of expenditure brought about by population growth and real growth in per-capita spending levels.

Section 13:

- 1.19 Sets out our views on the qualitative and quantitative need for further commercial leisure floorspace in St Albans District.

Section 14:

- 1.20 Following the exercise examining the quantitative need for further retail and leisure floorspace, this section gives consideration to the allocation of potential development sites.

Section 15:

- 1.21 Summarises the key findings arising from the previous sections of the study and sets out a series of recommendations based on the findings.

2 THE REQUIREMENTS OF NATIONAL PLANNING POLICY

2.1 This section provides an overview of current national, regional and local planning policy guidance in relation to retail and leisure development. This policy guidance sets the background to the retail and leisure assessment.

National Planning Context

Planning Policy Statement 6: Planning for Town Centres (March 2005)

2.2 Planning Policy Statement 6: Planning for Town Centres (PPS6) was published on 21 March 2005. This document sets out Government guidance on retail planning policy and planning for town centres.

2.3 PPS6 replaces Planning Policy Guidance Note 6 which was published in June 1996.

2.4 The Government's key objective for town centres is to promote their vitality and viability by planning for the growth and development of existing centres; and promoting and enhancing existing centres, by focusing development in such centres and encouraging a wide range of services in a good environment, accessible to all (paragraph 1.3).

2.5 Other Government objectives which need to be taken account of in this context, include:

- enhancing consumer choice by making provision for a range of shopping, leisure and local services, which allow genuine choice to meet the needs of the entire community, and particularly socially excluded groups;
- supporting efficient, competitive and innovative retail, leisure, tourism and other sectors with improving productivity; and
- improving accessibility, ensuring that existing or new development is, or will be, accessible and well served by a choice of means of transport (paragraph 1.4).

2.6 In addition, it is confirmed that wider policy aims are also relevant including the need;

- to promote social inclusion;
- to regenerate deprived areas, creating new employment opportunities and an improved physical environment;

- to promote economic growth of regional, sub-regional and local economies;
 - to deliver more sustainable patterns of development;
 - to promote high quality and inclusive design (paragraph 1.5).
- 2.7 Paragraph 1.7 confirms that it is not the role of the planning system to restrict competition, preserve existing commercial interests or to prevent innovation.
- 2.8 The main town centre uses, to which PPS6 applies, are set out at paragraph 1.8 of the guidance. These include, retail (including warehouse clubs and factory outlet centres), leisure, entertainment facilities, the more intensive sport and recreation uses, offices, and arts, culture and tourism facilities.
- 2.9 Within a regional planning context, local planning authorities should actively plan for growth and manage change in town centres over the period of the plan by;
- selecting appropriate existing centres to accommodate the identified need for growth by;
 - making better use of existing land and buildings;
 - where necessary, extending the centre.
 - managing the role and function of existing centres; and
 - planning for new centres of an appropriate scale in areas of significant growth or where there are deficiencies in the existing network of centres (paragraph 2.3).
- 2.10 Local planning authorities should aim to increase the density of development, where appropriate. Opportunities within existing centres should be identified for development or redevelopment. Local planning authorities should seek to ensure that the number and size of sites identified for development is sufficient to meet the scale and type of need identified (paragraph 2.4). Where growth cannot be accommodated in identified existing centres, local planning authorities should plan for the extension of the primary shopping area if there is a need for additional retail provision or, where appropriate, plan for the extension of the town centre to accommodate other main town centre uses (paragraph 2.5).
- 2.11 An extension of the primary shopping area or town centre may also be appropriate where a need for large developments has been identified and this cannot be accommodated within the centre. Larger stores may deliver benefits for consumers and local planning authorities

should seek to make provision for them in this context. In such cases, local planning authority should seek to identify, designate and assemble larger sites adjoining the primary shopping area (paragraph 2.6).

2.12 Paragraph 2.8 confirms that where existing centres are in decline, local planning authorities should assess the scope for consolidating and strengthening these centres by seeking to focus a wider range of services there, promote the diversification of uses and improve the environment. Where reversing decline is not possible, local planning authorities should recognise that these centres may need to be reclassified at a lower level within the hierarchy of centres, and reflect this revised status in the policies applied to the area.

2.13 Local planning authorities should adopt a positive and proactive approach to planning for the future of all types of centres within their areas (paragraph 2.15).

2.14 Local planning authorities should;

- assess the need for new floorspace for retail, leisure and other main town centre uses, taking into account both quantitative and qualitative considerations;
- identify deficiencies in provision, assess the capacity of existing centres to accommodate new development, and identify centres in decline where change needs to be managed;
- identify the centres within their area where development will be focused, as well as the need for any new centres of importance, and develop strategies for developing and strengthening centres within their area;
- define the extent of the primary shopping area and the town centre, for the centres in their area;
- identify and allocate sites as required;
- review all existing allocations and reallocate sites which do not comply with PPS6;
- develop spatial policies and proposals to promote and secure investment in deprived areas; and
- set out criteria based policies for assessing and locating new development proposals (paragraph 2.16).

- 2.15 In selecting sites for development, local planning authorities should;
- assess the need for development;
 - identify the appropriate scale of development;
 - apply the sequential approach to site selection;
 - assess the impact of development on existing centres; and
 - ensure that locations are accessible (paragraph 2.28).
- 2.16 In assessing the need and capacity for additional retail and leisure development, local planning authorities should place greater weight on quantitative need for additional floorspace for specific types of retail and leisure development. However, local planning authorities should also take account of qualitative considerations (paragraph 2.33).
- 2.17 Additional benefits in respect of regeneration and employment do not constitute indicators of need for additional floorspace (albeit they may be material considerations in the site selection process) (paragraph 2.37).
- 2.18 Local planning authorities should require applicants to demonstrate;
- the need for development;
 - that the development is of an appropriate scale;
 - that there are no more central sites for the development;
 - that there are no unacceptable impacts on existing centres;
 - that locations are accessible (paragraph 3.4).
- 2.19 Need must be demonstrated for any application for a main town centre use which will be in an edge of centre or out of centre location and which is not in accordance with an up-to-date Development Plan Document Strategy (paragraph 3.9).
- 2.20 The need for additional floorspace should normally be assessed no more than five years ahead (paragraph 3.10) and an indicative upper limit for the scale of a development likely to be acceptable in particular centres maybe set out in the development plan. Where this is not the case, the scale of development should relate to the role and function of the centre within the wider hierarchy and the catchment served (paragraph 3.12).
- 2.21 Paragraph 3.13 confirms that the sequential approach to site selection should be applied to all development proposals for sites that are not in an existing centre nor allocated in an up to date development plan document. In applying this sequential approach developers and operators should be able to demonstrate that in seeking to find a site in or on the edge of existing centres they have been flexible about their proposed business model (paragraph

3.15). However, local planning authorities should take into account any genuine difficulties, which the applicant can demonstrate are likely to occur when operating the applicant's business model from the sequentially preferable site, in terms of scale, format, car parking provision and a scope for disaggregation, such as where a retailer would be required to provide a significantly reduced range of products (paragraph 3.16).

2.22 A single retailer or leisure operator should not be expected to split their proposed development into separate sites where flexibility in terms of scale, format, car parking and the scope for the disaggregation has been demonstrated (paragraph 3.18).

2.23 Applicants should provide clear evidence to demonstrate why sequentially preferable sites are not practical alternatives, in terms of;

- availability;
- suitability; and
- viability.

2.24 Local planning authorities should consider the impact of the development on the centre or centres likely to be affected, taking account of:

- the extent to which the development would put at risk the spatial planning strategy for the area and the strategy for a particular centre or network of centres, or alter its role in the retail hierarchy;
- the likely effect on future public or private sector investment;
- the likely impact on the proposed development on trade/turnover and on the vitality and viability of existing centres within the catchment area of the proposed development;
- changes to the range of services provided by centres that could be affected;
- likely impact on the number of vacant properties in the primary shopping area; and
- potential changes to the quality, attractiveness, physical condition and character of the centre or centres and to its role in the economic and social life of the community centre (paragraph 3.22).

2.25 Furthermore, in considering proposed new developments, local planning authorities should consider whether developments are generally accessible by assessing the distance of

proposed developments from existing or proposed transport facilities and assessing the impact with the overall distance travelled by car and the effect on local traffic levels and congestion after public transport and traffic management measures have been secured (paragraph 3.25, and 3.27).

Planning Control of Mezzanine and Other Internal Floorspace Additions (March 2005)

- 2.26 On 3rd March 2005 the Government published a Consultation Paper relating to planning control over mezzanine floors. The Consultation Paper proposes that planning permission will be required for all works that require floorspace over 200sqm. The Consultation Paper sought views from the property industry on the proposed threshold of 200sqm, namely, whether a different threshold should apply. The Paper proposes changes to the General Development Procedure Order (GDPO). The proposed change applies to all retail floorspace whether in town centres, edge of centre or out of centre locations but only in England and Wales.
- 2.27 The consultation period on the paper ceased on 26 May 2005. Currently, we understand that the relevant secondary legislation is unlikely to be published prior to January 2006.

Regional Planning Context

Regional Planning Guidance for the South East (RPG9)

- 2.28 The relevant adopted regional planning guidance comprises Regional Planning Guidance for the South East (RPG9) published March 2001.
- 2.29 Policy Q5 confirms the region's existing network of a larger town centres should be the focus for major retail, leisure and office developments, to support an urban renaissance, promote social inclusion and encourage more sustainable patterns of development.
- 2.30 The RPG confirms that local planning authorities should assess the need for new retail and leisure facilities in their area and identify which town and district centres should be the preferred locations for growth. Local authorities are required to apply the sequential approach in identifying any sites for development.

East of England Plan: Draft Revision to the Regional Spatial Strategy for the East of England (December 2004)

- 2.31 Since the publication of RPG9, St Albans District has transferred under the new regional arrangements to the East of England.

2.32 In terms of the Regional Spatial Strategy (RSS), the Examination in Public commenced on 1st November 2005 with the publication of the Panel Report expected in mid-2006. The final publication of the East of England Plan is expected in early 2007.

2.33 Policy SS5 (Town Centres) confirms town centres will be the continued focus for investment, environmental enhancement and regeneration. The strategic policy confirms that within the context of a community strategy approach, local development documents will:

- include a strategy for each town centre to promote successful mixed use economies, manage change, refocus where necessary and support cultural heritage;
- protect and enhance existing neighbourhood centres, and where a need is established, promote new provision of an appropriate scale and function to meet local day-to-day needs;
- ensure land is allocated to meet the full range of identified needs.

2.34 Policy E9 (Regional Structure of Retail Centres) sets out the regional retail hierarchy, namely:

- Major Regional Centres: Basildon, Cambridge, Colchester, Chelmsford, Ipswich, Norwich, Peterborough, Southend and Watford;
- Regional Centres: Bedford, Bury St Edmunds, Great Yarmouth, Harlow, Hemel Hempstead, King Lynn, Lowestoft, Luton, St Albans, Stevenage and Welwyn Garden City;
- Other Towns and Market Towns;
- Village and Local Centres.

2.35 Paragraph 6.33 confirms eastern England has an established structure of retail centres ranging from major regional centres to smaller market towns and villages, all of which play a key role in meeting the needs of their catchment areas. In the north of the region retail centres tend to be more widely dispersed with relatively discreet catchments, while in the south the larger centres are closer with more complex catchments. St Albans falls into this latter category. The south of the region is also more strongly influenced by London. Paragraph 6.35 confirms that for retail and leisure the East of England competes with

surrounding national centres particularly with London, but also with Milton Keynes, the Bluewater Shopping Centre and to a more limited degree, Nottingham, Leicester and the East Midlands.

2.36 Policy E10 (Retail Strategy) confirms that in accordance with Policy E9:

- New retail development will be located in existing centres which will be consistent in scale, size, character of the centre;
- Local development documents will propose a higher order provision only where a need is established, it will result in a more sustainable pattern of development and movement, and there will be no significant detrimental impact on other centres or the transport network and there is environmental capacity;
- In the Sustainable Communities Plan growth areas local development documents will propose development of retail and services in new and existing centres in accordance with sub-regional strategies and policies;
- Local development documents will consider the role of retail within priority areas for regeneration and propose development and enhancement to implement regeneration strategies.

2.37 Paragraph 6.36 notes there will be significant growth within the region's Sustainable Communities Plan growth areas and that the advancement of Harlow to the status of sub regional centre will be sought, while expansion of Stevenage's retail and services offer will also be sought. Paragraph 6.37 confirms that all development documents will address retail needs and present an analysis of their area designed to produce a coherent retail strategy in relation to their existing town centres, edge of town centre and out of town centre retail sites and e-tailing growth.

2.38 Paragraph 6.39 confirms retail centres should support and enhance their existing functions and absorb expenditure growth through higher quality development without changing the centre's position in the regional structure.

2.39 Policy E12 (Out of Town Retail) provides guidance as to how local development documents should define the current and future role of existing out of town centre retail sites in relation to existing town centres. Supporting paragraph 6.42 notes there are significant out of town centre retail sites with eastern England including at London Colney.

Local Planning Context

2.40 The relevant development plan for St Albans comprises the Hertfordshire Structure Plan Review (1991-2011) adopted in April 1998, and the City and District of St Albans Local Plan Review adopted November 1994.

Hertfordshire Structure Plan Review (1991-2011)

2.41 Town centres are considered at paragraphs 100-105. Policy 4 (Town Centres) confirms town centres should be preferred locations for development which attracts many trips. The policy then confirms that the county's town centre's viability will be maintained and sets out a list of priorities for all the town centres.

2.42 Retailing and the location of new retail development is dealt with at paragraphs 252-262. Policy 16 (Retailing) confirms provision will be made for major retail development through local plans in accordance with Government guidance and in particular in the sequential approach. The policy sets out the county retail hierarchy which is as follows:

- Major Sub Regional Centres - Stevenage, Watford;
- Minor Sub Regional Centres – Bishop's Stortford, Hemel Hempstead, Hitchin, St Albans, Welwyn Garden City.
- Town Centres - Borehamwood, Hatfield, Hertford, Hoddesdon, Letchworth, Waltham Cross;
- Minor Town Centres - as identified in local plans; and
- District and Local Shopping Centres - as identified in local plans.

2.43 The policy confirms that within the historic centres, inter alia, St Albans, development should be consistent with the maintenance and enhancement of the historic core.

2.44 Policy 17 (Location of New Retail Development) deals with the sequential approach to site selection. The policy confirms that planning permission will be granted for retail development which sustains and enhances the vitality and viability of the council's town and local centres as identified within the retail hierarchy. The policy confirms the sequential approach to site selection will be undertaken in the assessment of retail proposals. The policy also sets out a number of criteria by which out of centre developments will be judged. These criteria include:

- The effect on vitality and viability of other centres;
- Accordance with any town centre strategy;
- The overall pattern of provision and relationship to population distribution;
- Accessibility by choice and means of transport;
- Residential amenity;
- Conflict with other policies of the plan.

Hertfordshire Structure Plan Alterations 2001-2016

- 2.45 The first Alteration Issues Paper was published for consultation from July-September 2002 following which Hertfordshire County Council carried out statutory consultation on the deposit stage. However, following the publication of the Draft Regional Spatial Strategy (discussed above) the County Council postponed the Examination in Public (originally scheduled for September 2003) and the emerging Structure Plan is currently being held in abeyance. The deposit draft plan should be afforded some weight, but, we are advised that once the Regional Spatial Strategy is approved, this document will be formally withdrawn.
- 2.46 The Hertfordshire Structure Plan Alterations 2001-2016 deposit draft version was published February 2003. Policy 4 relates to town centres and broadly reiterates Policy 4 of the approved structure plan. Retailing and development attracting many trips is dealt with at paragraphs 188-199 inclusive. Policy 16 (Retailing) reiterates Policy 16 of the adopted structure plan discussed above.
- 2.47 Policy 7 (The Location of New Development Attracting Many Trips - The Sequential Approach) sets out the sequential approach to site selection as detailed within PPG6 and sets out a number of criteria for consideration of any developments on out of centre sites.

City and District of St Albans Local Plan Review (November 1994).

- 2.48 The publication of the adopted local plan predates PPG6 (June 1996) and as such has been superseded by current Government guidance in some areas.
- 2.49 Policy 46 sets out relevant parking standards for retail uses, which sets out parking standards in excess of current guidelines contained in PPG13.
- 2.50 Policy 51 provides an overall strategy for shopping and service uses confirming St Albans to be a minor sub-regional centre, Harpenden Town Centre to be a minor district centre and several neighbourhood centres of Southdown, Redbourn, Wheathampstead, Verulam Estate, Fleetville, The Quadrant Marshalwick and London Colney.

- 2.51 Policy 52 relates to shopping development within St Albans City Centre. The policy confirms that land south of the Civic Centre may become available for a department store development. The policy then sets out a number of sites within St Albans City Centre where small scale retail development (or service uses) will be permitted. The policy also defines primary and secondary shopping frontages in the town.
- 2.52 Policy 53 relates to shopping development in Harpenden Town Centre and confirms that major new shopping development (i.e. over 1500m²) will generally be refused. The policy does however identify three locations where small scale retail development may be acceptable. The policy then goes on to define the relevant primary and secondary shopping premises.
- 2.53 Policy 54 sets out the relevant primary and Class 'A' frontages neighbourhood centres Policy 55 provides details of relevant local shopping facilities.
- 2.54 Any loss of retail floorspace in the district is required to be considered against Policy 56 (Loss of Retail Floorspace).
- 2.55 Policy 58 (Major Retail Development Outside the Existing Town Centres) sets out two potential sites for retail warehousing and then confirms that other proposals for major retail developments will only be permitted if a retail impact study is submitted. The policy contains no reference to the sequential approach to site selection.
- 2.56 Specific references are made to the Civic Centre South site within Policy 116 (St Albans City Centre Policy Area 2 Central Shopping Core). The policy states that, in respect to Civic Centre South, the council will prepare a planning brief for the redevelopment of the area. The proposal should enhance the character and appearance of this part of the conservation area. A mix of uses will be favoured and particular consideration will be given to incorporate the following elements:
- a. Shopping, including possible department stores;
 - b. Civic, leisure, cultural, entertainment uses;
 - c. Car park; and
 - d. An improved pedestrian route through the site from the Maltings to the St Albans Arena.

3 ANALYSIS OF RECENT AND FUTURE RETAILING TRENDS

- 3.1 This section provides an overview of recent and likely future national retailing and leisure trends. Some information is provided on the regional context and local context. However, due to the information available the majority of the trend information relates to the national level.
- 3.2 An assessment of future retail or leisure demand or “*need*” should have regard to emerging trends within the industry, as these may influence the conclusions of the assessment. In this respect, various research into shopping trends suggests the face of domestic retailing could alter during the course of the Local Development Framework for St Albans through to 2021. These projected changes in shopping and leisure patterns could have fundamental implications for the way in which city and town centres are used, and how they will need to respond.

National Trends in Expenditure

- 3.3 On 26 September 2005 MapInfo and Oxford Economic Forecasting issued Information Brief 05/2 (Goods Based Retail Expenditure Estimates and Price Indices). This document sets out the latest trends in consumer retail expenditure per head on convenience and comparison goods in the United Kingdom.
- 3.4 MapInfo report that the United Kingdom National Accounts (The Blue Book) suggests that the consumer boom was even more marked in recent years than has previously been estimated. Consumer spending is now reported to have risen 3.7% in real terms in 2004, up from 3.4% according to earlier estimates, with growth in the previous two years revised by 0.3% points. However, real household income growth has been revised for 2004 to 1.9% from 2.5% previously. Accordingly, the saving ratio has been revised lower, from its previous average for last year of 5.6% to just 4.2%. Household financial deficit is now reported to have risen to £24.6 billion in 2004, up from £10.4 billion in 2003.
- 3.5 The above data suggests that much of the recent consumer boom has been financed by borrowing than was previously thought to be the case. MapInfo notes it is surprising that with mortgage equity withdrawal rising to 8% of household income, and consumer credit increasing at double-digit rates, spending did not rise more rapidly. MapInfo believes that the saving rate should drop even lower as the saving ratio is still relatively high by historic standards. Overall, the financial position of the household sector remains robust. Wages are rising ahead of inflation and employment continues to expand. Moreover, household wealth is at a historically high level relative to income and confidence remains much higher than its historic average.

- 3.6 2005 is clearly a much tougher year for retailing than previous ones. Annual retail sales growth has been subdued, in particular for housing relating goods. Moreover, with high street prices falling 1% over the last year, retailer's margins are clearly under intense pressure. Much of the recent weakness in retail sales reflects the downturn in the housing market. However, with lead indicators suggesting that housing activity may be looking to recover, and the household financial position healthy, it would be surprising to see a serious slump in consumer demand.
- 3.7 MapInfo reports that in terms of longer-run trends recent growth in spending on goods continues to be dominated by spending on comparison goods. Annual growth in 2005Q1 remained robust, above total goods spending growth and near to the trend rate of expansion according to short-run trends. Ultra-long run trends, calculated from 1964 onwards, show that spending on comparison goods has risen at average annual rate of 3.8%, but with acceleration in more recent years. The annual average rate of growth has been 8.5% since 1998, more than double the longer-run average rate. Growth in expenditure per capita on convenience goods has been much lower, with a trend decline observed in this year of spending on these types of goods.
- 3.8 As an alternative to pure trend-based projections, MapInfo Information Brief 05/2 contains forecasts produced by Oxford Economic Forecasting which are shown in Table 2 attached at **Appendix 1**. These forecasts are consistent with past trends, but also based upon expected changes in other economic variables of interest according to historic relationships. It is suggested that short-term growth rates, particularly for comparison goods are clearly unsustainable and some correction is necessary to revert to levels dictated by medium and long term trends. This appears to have begun according to data for 2005Q1. Consumer spending is now reported of risen only 0.1% in real terms with growth over the last year of 2.6%. It is expected that total consumer spending (on goods and services) will rise by only 1.8% this year, but with expected growth of 2.6% in 2006. This is in line with continued growth of disposable income, averting any risk of affordable spending. This is particularly supportive of convenience goods spending which is less prone to cyclical spending. The stable outlook will allow continuation of recent trends.
- 3.9 Possibly, as a result of the cooling housing market, expenditure growth on furnishings and household goods may ease in 2005 before some pick up in 2006, but with growth lower than in recent years. Information Brief 05/2 expects trends towards pricing weakness to continue, supporting continued spending growth, particularly in consumer electronics.

National Trends in Retail Trading Formats/Investment

- 3.10 The growing trend towards increased centralisation of services, whereby larger stores serving an extensive catchment area replace a number of smaller stores, as experienced in the DIY retail sector particularly, is likely to continue through all retail sectors. This is in response to the desire to achieve increasing economies of scale and also the increasing mobility of customers. District and local centres in St Albans District may be susceptible to this trend, with the effect being increased vacancies caused by the relocation or the closure of independent retail units. New and innovative forms of retailing will continue to require new sites, and not all retailer's preferred formats are likely to be accommodated in existing shopping centres. There is also likely to be an increasing pressure to release existing retail parks from "bulky goods" restrictions to accommodate specialist retailers selling traditional high street goods, particularly sports, toys and clothing goods. However, any such applications for amendments of conditions must be treated in the same way as proposals for new floorspace. In addition, there is currently significant asset management of existing retail warehouse parks whereby, existing bulky goods retailers are removed from units with open A1 commissions to other units with a solely bulky goods consent. Certain retailers, such as Borders, Habitat and Next are particularly sought after by retail warehouse park owners to take space in such open A1 units.
- 3.11 Planning policy has substantially reduced out of centre development in recent years. The amount of retail warehouse floorspace in the development pipeline has substantially reduced although demand for out of town retail space remains strong. Currently there remains some 6 million ft² of retail space currently in the pipeline, of which approximately 2 million ft² is under construction. However, as planning for new development space is becoming increasingly restricted, opportunities for out of town retail warehousing will become limited. Just under half of the major new schemes in the pipeline are in excess of 9,290m² (100,000ft²) with a general trend towards smaller parks (i.e. 4-7,000m²/50-75,000ft²) in smaller towns.
- 3.12 As demand for retail warehouse units continues to be strong, supply however remains constrained by restrictive and protracted planning procedures. Proposed new sites are taking longer to secure permission, with developers encouraged to regenerate the more complicated edge of centre and in town sites. In terms of in-town schemes, there has been a recent increase in the number of shopping centres being developed within town centre locations. Indeed, in September 2005 the Chapelfield scheme in Norwich developed by Lend Lease opened with a total floorspace of 49,237m² (530,000ft²), and is the largest shopping centre opening for 2005.

- 3.13 One result following on from the Government's published intentions to restrict the growth of mezzanines has been a resultant rush by the landlords to install mezzanine floors or, at the very least to make a material start on site with respect to the construction of such floorspace before the Regulations come into force.

Out-of-Town Retail Trends

- 3.14 A number of retailers continue to expand out-of-town including TK Maxx and Matalan, Habitat and Wickes.
- 3.15 The Focus Retail Demand 2005 (FoRD) report is the only published account of demand trends in UK shopping, FoRD is the established benchmark of demand-side analysis in the retail market, covering over 1,100 retail centres and slowing demand in sq.ft. In order to compile the 2005 report, FOCUS research is practically collated, involving 23,000 requirements from 900 multiple retailers. The 2005 report confirms out of town demand has reduced in all key locations. In terms of St Albans, this was ranked in 2005 at number 21, up from 2004 when it was ranked number 37. Current out of town demand for St Albans in 2005 is some 185,320sqft.
- 3.16 A copy of the Focus on Retail Demand report is attached at **Appendix 2**.

Grocery Sector

- 3.17 A combination of factors, but most notably a tightened planning regime restricting the opportunity to build further large superstores, has resulted in a high level of volatility within the grocery sector with some of the biggest players in the domestic market (Tesco, ASDA, Sainsbury's, Morrisons and Somerfield) being involved in intense competition to retain or expand market shares. Most notable, are the Morrison's acquisition of Safeway, together with the recent acquisition of Iceland and the current uncertainty regarding a potential take over of all or part of the Somerfield portfolio.
- 3.18 With the introduction of the test of "need" and the sequential approach to site selection, new sites for food retailing are becoming increasingly scarce. In order to retain and enhance existing market shares, during the course of the Local Development Framework period, national multiples are likely to continue to adopt the following practices:
- Extend existing premises. There will be pressure for large out-of-centre stores to upgrade to more modern formats, including an increased element of non-food goods and associated services in order to create a one-stop shop destination; and

- Expand into niche markets such as the local convenience store sector. Most national convenience multiples now have a format which is associated either with petrol filling stations or local shopping facilities which are becoming increasingly common and successful. The move of the major operators into this market sector is likely to reduce the number of independent retailers over the period of the emerging LDF.

3.19 The issue of discount food retailers is discussed separately in the following section.

Comparison Goods Shopping

3.20 Competition in the comparison sector remains intense. This is reflected in a number of high profile retailers recently going into administration including Courts, Klausner, Allsports, Ciro Citterio, Furnitureland and Alders.

3.21 The DIY sector has experienced significant growth over the last few years, aided to a considerable extent by the proliferation of home and garden DIY television programmes and rising house prices. This sector is likely to prove more resilient in terms of consumer confidence in future years. Within the sector over recent years, consolidation has taken place with a move towards operators building larger format stores.

3.22 Department stores attract more affluent customers whose numbers are growing as a result of demographic change. With improved trading potential, the major store operators are keen to obtain additional sales space. However, stand alone department store developments are rarely viable; consequently, new store acquisition openings are restricted to shopping centre developments, where landlords/developers are prepared to contribute to the fit out costs or to pay a premium to the tenant in order to secure an “*anchor*” trader that will enhance the profile and “*letability*” of a development.

3.23 In the electrical goods sector, there may well be a further boom in expenditure as new technologies progress and replacement of existing household entertainment systems such as digital and widescreen televisions and recordable DVDs as well as personal gaming machines continues. Personal computer demand is likely to experience steady growth through innovations in hard/software.

3.24 There has been a discernable growth trend in the discount clothes sector with renewed consumer interest in value for money. Key beneficiaries of this trend have been discount retailers such as Matalan and Peacocks, as well as supermarket based clothing lines such as George at ASDA and Cherokee at Tesco.

- 3.25 One particular trend that is likely to continue is the much greater use of audio visual advertising mediums within stores. Already, since the introduction of floor screens within the Plaza Shopping Centre on Oxford Street many retailers have been experimenting with the use of audio visual advertising mediums in stores.

Leisure Trends

- 3.26 This section deals only with commercial leisure trends and not with hospitality or hotel trade. We are aware that St Albans District Council is currently updating its hotel study for the District.

Catering and Licensed Trade

- 3.27 Annual growth in consumer spending on catering (including both restaurants and quick service outlets) averaged a little over 2% in real terms during the first half of 2004. This is the slowest rate of growth since the second half of 1999 and compares to a rate of over 5% at the end of 2003. There has in recent years been a relatively robust growth in household spending on eating out. However, the seasonally-adjusted spending on catering decelerated during the second half of 2002, before stabilising in 2003. However, growth in spending on catering is not reflected in the recent performance of the UK's restaurants, take aways and fast food outlets. Growth and consumer spending on alcohol has been relatively weak for much of the last 15 years. What growth there has been has generally been seen in the "off-trade sector" with large supermarket chains able to offer lower prices than pubs and bars. This has resulted in a shift towards consumption at home rather than on licensed premises. Off-trade spending accounted for almost one third of the 39 billion spent by consumers on alcohol in 2003. This compares with a ratio of just over 20% at the beginning of the 1990's.
- 3.28 The stock of bars and restaurants has continued to increase across the board, although there is evidence of consolidation in some sectors. According to the British Beer and Pub Association there are an estimated 60,000 public houses in the UK in 2003 (excluding hotels, wine bars, restaurants and other licensed premises), compared to between 65,000 and 70,000 in 1989. In particular, there has been a number of acquisitions in this sector, with the major pub companies now owning a substantial proportion of all pubs within the UK.
- 3.29 The Interbrew UK Market Report 2004, confirms that on-trade is facing a greater challenge because there has been a decline in "occasions" over the past three years. The average number of visits to a licensed premises is falling and is now an average of 1.4 visits per week. More than 9 out of 10 visits involve only one venue and young adult males are less

likely to “*circuit*” drink now because the average number of venues visited has dropped by 5%. The key on-trade session is still a weekend evening which counts for 48% of alcohol volume consumed. The Report notes that there has been a decline in the evening visits to city centre venues and that Thursday is no longer the “*new*” Friday. An aging population means that the key pub going audience of 18-30 year olds will, in the long term, account for a smaller percentage of the population. In addition, the growth of further education has had a high impact on the finances of an emerging generation. In the mid 90s, three out of four students visited a pub weekly, but that figure has declined significantly since and will continue as the debt burden increases.

3.30 Measures to clamp down on binge drinking will continue to effect the pub sector, especially in larger urban areas. Increased revenue from changes to the licensing laws may help to take some of the pressure off those licensees who are able to take trade from clubs by opening later. However, it may be that the positive impact of licensing reform is offset partially in the longer term by liberalisation of the gaming industry with pubs and clubs in and around proposed new “*gambling resorts*” likely to suffer.

3.31 The other key trend in the pub and catering trade is the Government’s recent Health White Paper whereby it is proposed that smoking will be banned in all public places and work places in England by 2008. Restaurants and bars serving food will be included in the ban, although smoking will be permitted in pubs not serving food and in private members clubs. The likely impact of a smoking ban is uncertain. Evidence from Ireland and Scotland is unclear at present, as the ban remains a short term phenomenon. Evidence from the US, where several cities and states have had smoking bans in place for some time is more mixed. However, the weight of evidence suggests in the immediate term some deterioration in activities is likely to occur. As such, many operators may simply abandon their food offering in order to circumvent the ban.

3.32 The past years have seen a dramatic re-profiling of the corporate landscape in the night club and discotheque market. Operators have sought to build businesses to sufficient size and scale to withstand the combined forces of increased competition from late night high street bars and the planned deregulation. There has been a fall in recent years in the value of expenditure in night clubs and discotheques which mostly appears to have been experienced by the smaller clubs. However, the outlook for such uses is now much more positive as the larger clubs have had several years to come to terms with increased competition from late night bars and have adapted accordingly. Many operators already have a presence in the late night bar market and can capitalise on current consumer trends. Indeed, many of these new sites operate “*chameleon*” club/bar formats which try to capture the best of each type of outlet and which can change the focus of their function throughout the day.

Health and Fitness

- 3.33 According to the Fitness Industry Association (FIA) membership of public and private health and fitness clubs increased by 4.5% in 2003 to 6 million. This raised the membership penetration rate as a percentage of the population from 9.9% in 2002 to 10% in 2003. However, this represents relatively slow growth by recent industry standards. Growth in membership of private clubs slipped by one third last year whilst the number of new club openings fell to 88 last year from 146 in 2002. This is the lowest number of openings since 1996 and is a sharp reversal of the aggressive expansion of the 1997-01 period which saw new clubs open at an average rate of 160 per year. The health and fitness sector is driven by discretionary consumer spending and so it is more likely to suffer from a slow down in consumer demand as forecast for the next couple of years in core consumer sectors. However, in the longer term, the move towards healthier lifestyles is likely to continue to be supported by Government initiatives. It is therefore likely that there will be continued growth and demand for health facilities, together with further consolidation in the private sector and/or the development of more diverse membership offerings.

Gambling

- 3.34 According to ONS Data consumer spending on gambling (stake less winnings) increased by 22% year on year in real terms in the second quarter of 2004. This is the fastest rate of growth since the introduction of the National Lottery in 1994. The up swing in the gambling industry began in earnest in 2002 following abolition of the 9% tax on betting in October 2001 and the adoption of a new 15% tax on operators' gross profits. Effectively the shift of burden and payment from consumers (who are near able to bet "tax free") to operators has resulted in a sharp increase in betting activity. Other reforms, including legislation allowing firms to operate fixed-odds betting terminals, have also provided the industry with a boost. Betting stakes increased by 91.5% in nominal terms in 2002 and by a further 76% in 2003, according to HM Customs & Excise Data.
- 3.35 In terms of the outlook for gambling, The Gambling Act is still being progressed. The Government confirmed in a statement dated 16 December 2004 that it intends to have the Act fully implemented by late 2007. While introducing some restrictions on gambling to protect the vulnerable, the Bill will also result in further liberalisation in the sector, particularly with regard to casinos. However, a number of these reforms are now considerably watered down and are the subject of ongoing discussions. In respect of limiting the number of large "regional casinos" and limiting the number of slot machines, these changes may dilute potential games and could deter investors. There are still a number of gaps in the proposed legislation and further changes could always be made before the Bill is approved. However, due to the controversy the Bill appears to have stirred

up, the parliamentary process could delay final approval and implementation of the Gambling Bill. Also, whilst the proposed reforms are likely to have a positive impact on the industry, the scale of the impact is unclear. Furthermore, the benefits of reform are also likely to be unevenly spread both geographically and across industry sub-sectors. Although increased liberalisation should help create a more competitive environment, many of the current proposals are likely to assist the bigger players.

- 3.36 On 21st July 2005 the Government published the Consultation Paper "*Possible Changes to the Use Classes Order: Casinos*". This paper was on consultation until 21st October 2005. The Paper seeks views on the appropriate classification of casinos within the Use Classes Order and particularly sets out one of the Government's options which is making casinos sui generis with permitted development rights to revert to D2 use.

Cinemas

- 3.37 Two years of rapid growth (9.4% in 2001 and 12.8% in 2002) pushed admissions to a record breaking 175.9 million in 2002. Admissions decreased by just under 5% last year, despite the fact the number of films of shown jumped to 439 from 369 in 2002. This was the first decrease in five years, although with just over 167 million annual admissions last year these were at their second highest level for 30 years.
- 3.38 Robust consumer spending in recent years has no doubt been a factor in record cinema admission. However, growth and consumer spending is slowing down, and it is likely that cinema admissions and box office receipts will diminish again. In the longer term, an increasingly wide and more personalised viewing choice, resulting from both technological and regulatory changes to broadcasting is likely to take its toll on UK cinema. However, as demonstrated by the sector's recovery from the "*video revolution*" of the 1980s, the resilience of the cinema market should not be underestimated.

Ten Pin Bowling

- 3.39 Recent years have seen the ten pin bowling market go through a period of consolidation. In 1998 the market exceeded £200million for the first time. Last year AMF Bowl sold its 33 strong UK chain to Bourne Leisure further reducing the number of players in this field. The legacy of the consolidation of the last few years is that many ten pin bowling centres have changed into Family Entertainment Centres (FEC's) which also usually include catering outlets, snooker/pool halls and other forms of indoor entertainment.

Bingo Halls

- 3.40 Since 1980 there has been a decrease in the number of licensed bingo premises in the UK from 1,700 to about 970 in 1994, but with a substantial increase in turnover. This is currently around £1.5billion compared with £900 million in 1997. More recently there has been a trend to consolidation, with the development of new style clubs in purpose built developments on out of town parks. The new clubs have greater seating capacity often between 1,000 – 2,000.
- 3.41 Operators are promoting a more upmarket image with bars and catering and sometimes even stage acts. The trends indicate that overall the industry is expanding and that some customers are attracted by modern facilities on edge of centre sites – however a number of operators are now looking at town centre sites.

4 **GROWTH IN ELECTRONIC COMMERCE**

- 4.1 In the first quarter of 2004, Visa cardholders in the UK spent more than £2.4 billion online. This represents an increase of 123% from the same period in 2003.
- 4.2 The use of PCs as the principal means of conducting purchases may be superseded by digital television and games consoles, personal digital assistance and mobile telephones, all of which will widen the social-economic groups with potential to shop electronically. However, the non-availability to some social groups of credit and electronic cash will remain a barrier to the complete take up of electronic shopping.
- 4.3 The e-tail market continues to evolve with most retailers now considering that they need to have some exposure to this media. However, despite earlier predictions by many commentators to the contrary, e-tail has failed to threaten the viability of retailers on the high street. Indeed, it is the high street retailers themselves who are the primary participants in e-tailing and whilst e-tailing may have a certain impact on certain goods types, the *“must try it on/feel it”* factor is likely to mean that certain good types such as clothes and shoe shops remain competitive in the face of extended e-commerce.
- 4.4 Notwithstanding the above, it is likely that, e-commerce will continue to grow. ACNielsen Net Ratings Data shows that more than 55% of people in the UK have internet access at home and when adding in access from work, schools and internet cafes the number rises to 80%. More than 25 million people surf the web every month, with most visiting commercial sites.
- 4.5 On-line shopping activities such as researching, comparing prices and actually buying online are now an important part of overall purchasing within the UK. AC Nielsen Homescan Panel Data indicates that for the third consecutive year there has been growth across all key consumer measures – the number of internet shoppers, their annual spend, purchase frequency and the average amount spent per session.
- 4.6 Interestingly, many of the top sites are online versions of traditional stores. Net Ratings Net View shows John Lewis, Next, Boots and Woolworths all hold high positions in the online league. Furthermore, ranking above all of those is Tesco. More and more people are buying their groceries over the internet, and Tesco has one of the most successful sites in the UK. It dominates the online grocery shopping sector. In the year to December 2004, 6.9% of the population had bought online, and 3.9% had bought online from Tesco (ACNielsen Homescan). Homescan data shows these online shoppers are affluent and from larger households (40% more likely to be AB Households and 77% more than likely to be five member or larger households verses the AB average). The main shopper has a

greater propensity to be younger (between 25 and 44) and working. This supports the busy, time-starved working family theory, and offers e-retailers and manufacturers looking for online listing very desirable target markets. Notably, the more bulky convenience goods (eg bulk packs of washing powder, toilet rolls, bottled water) and frozen products perform well. In-van freezer facilities are an added benefit to the consumer with regard to the latter. However certain products such as bakery, confectionery, dairy, meat, fish and poultry all underperform against the national average in respect of GB spending, suggesting that consumers are still reluctant to let others choose their fresh produce. The purchase of goods on-line rather than from the high street is thus likely to be greater in some retail sectors (e.g. music and books) than others.

4.7 The long term implications of the high street may be that:

- Goods are ordered electronically but collected from high street shops. High street shops would therefore act as distribution and service spaces, with proportionally less space dedicated as display; or
- The town centre becomes increasingly leisure based as retailers use e-tailing exclusively as a means as reducing costs. Goods would be distributed from depots, and therefore a demand for town centre premises would decline sharply; or
- E-commerce creates demand for specialist internet shopping “malls” organised around geographical areas or new consumers; or
- E-commerce does not impact on the high street, but is used to browse for goods prior to purchasing in the town centre. Internet shopping therefore retains a complementary role in transactions regarding certain goods type; or
- Town centres find new opportunities arising from commerce, with local shops offering enhanced services, and delivering increased levels of customer satisfaction.

4.8 Given the relatively immature nature of this market, it is still not clear how extensive the impact of e-commerce is likely to be on the centre within St Albans district. It is, however, appropriate that some allowance for ecommerce shopping is taken in any assessment of retail capacity or impact.

5 DISCOUNT FOOD RETAILING

- 5.1 St Albans City and District is relatively unusual in that it has no discount food store operator. The Assessment Brief requires consideration as to whether such discount foodstore operations ought to be treated any different from normal retail floorspace, when considering the need for additional foodstores in the district.
- 5.2 There has been considerable expansion by the “*deep discount*” food retail sector in the UK over the last decade or so. It is likely that there will remain pressure for further such development over the forthcoming LDF period since the preferred mode of expansion by such operators (in order to ensure maximum operational efficiency) is to provide a number of identical small stores serving relatively small population catchment areas (relative to the major supermarket operators), rather than large format stores serving a wide area and seeking to meet all consumer needs under one roof.
- 5.3 Food discounters such as Aldi, Netto and Lidl have focused on the “*value for money*” food sector. In November 2004 Aldi announced it was going to open 200 stores in seven years as part of a £500 million expansion drive.
- 5.4 Currently, discounters account for around 5% of the grocery market. Individually, the number of operators have significantly less market share than in their home markets. Recently, discounters have been attempting to move up market. This is epitomised by Aldi which is now trying to attract a new sort of customer and has embarked on a £6 million advertisement campaign to highlight some of the 200 new lines that have been added within the last year. The company is seeking to change the perception that the weekly shop is not possible at a discount operation.
- 5.5 It is easy to see the discounters as being reactive rather than proactive in the market, particularly given that supermarkets such as ASDA and Tesco combine discount products with emphasis on fresh produce and more expensive quality lines.
- 5.6 Government guidance on retailing is set out within PPS6. There is no specific reference within PPS6 that discount grocery stores should be treated any differently from normal retail floorspace. This would suggest that the Government does not expect such floorspace to be treated any differently. Although there are two daughter documents to PPS6 which remain to be published, we do not expect that either of these will contain any mention that discount grocery retailing should be treated any differently from normal floorspace.
- 5.7 This view is supported by recent appeal decisions. In particular, a recent call-in decision concerning an application by Lidl UK Former Haven Foundry, New Road, New Haven (LPA

Ref: LW/01/1464/L). The Secretary of State's decision is dated 22 March 2005 (Ref:APP/P1425/V/03/1132932) and in considering the qualitative need for the proposal the Secretary of State stated that he:

“does not accept that ‘deep discounters’ should be assessed as distinct types of retail development in their own right. PPS6 only distinguishes between assessment for convenience goods and comparison goods”. (Paragraph 12)

- 5.8 The Secretary of State's Inspector, who recommended that outline planning permission be refused, made no comment when assessing qualitative need that deep discounters should be treated any differently from any other retail proposal.
- 5.9 A copy of the Secretary of State's letter is attached at **Appendix 3**.

Conclusion

- 5.10 In light of the above recent Secretary of State's decision (which is post the publication of PPS6), the position of the ODPM on such matters is clear: discount food stores should be considered to be subject to all of the tests set out in PPS6 in an equivalent manner to any other type of retail floorspace. As such, qualitative considerations regarding the nature of floorspace remain secondary to the requirement for the demonstration of a quantitative need.

6 RETAILER AND BUSINESS SURVEY

Introduction

6.1 In order to provide an insight into trader's perceptions of the two main centres in St Albans District, a survey of retailers and other businesses was incorporated into the Retail and Leisure Assessment 2005 being undertaken by GLH. A copy of the Town Centre Business Questionnaire is provided as **Appendix 4**. The survey inter alia sought to canvas businesses views on:

1. The suitability of existing retail premises;
2. Key issues facing town centre retailing;
3. Ways to improve the centre;
4. The quality of retail and leisure facilities and amenities; and
5. Competing centres.

6.2 The questions were agreed with officers of the local planning authority and a questionnaire distributed to each retailer and other business located within St Albans City Centre and Harpenden Town Centre (as defined on Maps 2 and 3). The surveys were hand delivered to each retailer/business with a stamped addressed return envelope.

6.3 A response rate of 12.7% (50 responses) and 8.8% (16 responses) was received from St Albans and Harpenden businesses respectively. A response rate of 20% is generally perceived as average to such surveys. It is difficult to give a single reason as to why the response should be lower than average, principally it relates to business/retailer apathy.

6.4 Notwithstanding the above, some 66 responses to the questionnaire were received in total, which is sufficient to give a meaningful insight into the views and opinions of retailers/business within the study centres.

6.5 We now consider the responses from the business/retailers for each study centre in turn.

ST ALBANS CITY CENTRE

6.6 Some 50 responses were received from 395 distributed questionnaires, giving a response rate of 12.7%. Of these, 74% were from retailers (Table 6.1), with 62% being independent businesses (Table 6.2). The respondents consider their businesses heavily dependent on trade from the local population, followed by local employees. Almost half the respondents occupy premises under 1,000 sq ft, though a significant 12% did not respond to this question (Table 6.5). Nearly 50% of respondents have occupied premises in St Albans for

over 10 years (Table 6.6), although only 18% are owners/freeholders. The dominant business trend appears to be small, independent businesses of long standing, mostly serving the local resident population and employees of the City Centre.

Table 6.1 Breakdown of business type	
Business Type	%
Retailer	74
Restaurant/Café/Takeaway/Pub	12
Professional/Financial Services	10
Personal and Other Services	4

Table 6.2 Business Structure	
Business Structure	%
National multiple chain	26
Part of a regional multiple chain	12
Independent/ individual business	62

Table 6.3 Source of business					
Source of business	0-20%	21-40%	41-60%	61-80%	81-100%
Local residents	12	14	36	26	10
People working in the town centre	26	34	12	12	2
Others (tourists/visitors)	34	14	4	6	0

Table 6.4 Tenure of business	
Business Type	%
Owner/Freeholder	18
Leaseholder	82
License/Short term rental	0

Table 6.5 Size of Premises	
Size of Premises (overall floor area)	%
Up to 500 sq ft	22
501 – 1,000 sq ft	26
1,001 – 1,500 sq ft	14
1,501+ sq ft	26
No Response	12

Table 6.6 Number of years in St Albans/current premises		
Period	St Albans %	Current premises %
Up to 1 year	8	10
1 – 5 years	28	36
5 – 10 years	16	16
10 years +	48	38

Accommodation

- 6.7 Approximately 70% of respondents were currently happy with their accommodation. Those that were dissatisfied identified inadequate size and lack of suitable servicing as key issues (Table 6.7). Some retailers plan to undertake refurbishment works, including internal (30%) and external (10%) refurbishment, within the next 3-5 years (Table 6.9).

Table 6.7 Satisfaction with accommodation	
Accommodation	%
Satisfied	70
Unsatisfied	30

Table 6.8 Reasons for dissatisfaction with accommodation	
Reason	%
Too large	2
Too small	8
In poor condition	6
Lacking suitable servicing	14

Table 6.9 Plans for refurbishment	
Reason	%
Yes – Internal Refurbishment	30
Yes – External Refurbishment	10
No	56
Other	1
No Response	4

Location

6.8 In terms of location of their current premises, retailers and business people were asked to identify the reason why (if any) their trading location was unsatisfactory. The most commonly reported reasons included:

- Disruptions caused by roadworks;
- Inadequate levels of parking/expense of parking;
- Difficulties with access/loading opportunities;
- Lack of footfall past premises;
- Inadequate sales floorspace;
- General deterioration and closure of other retailers creating an unattractive/undesirable shopping environment; and
- Poor public perception of St Albans as a shopping destination.

6.9 Notwithstanding the above, some 84% of retailers indicated that they did not currently plan to relocate their business (Table 6.10). Of the 16% with relocation plans, the majority (63% - 5 respondents) indicated that they planned to relocate to another town. Prohibitive rents/rates, parking problems and the need to access more customers were the primary reasons identified for the decision to relocate. No respondent was considering closing their business.

Plans to relocate	%
Yes	16
No	84

6.10 The relocation intentions of the businesses surveyed within St Albans can be compared with the health check of the centre which is discussed later in this study. The vast majority of respondents intended to remain in situ either in the short or long term. For those that were considering relocating, the majority intended to relocate away from St Albans. This should not be considered a reflection on St Albans, as in real terms, there were only five respondents who were considering this option, and may be a result of other factors such as a change in lifestyle etc. The fact that most respondents were planning to remain and that no respondents were considering closing down, is reflective of the positive health of the St Albans City Centre.

Turnover

6.11 The survey shows that for 36% of retailers, turnover had been increasing over the past three years. However for a similar proportion (34%) turnover had been decreasing (Table

6.11). For those that were part of a national multiple chain (26 respondents), approximately 30% indicated that their turnover was around average for their business and 27% believe they were outperforming other branches.

Table 6.11 Turnover in the last three years	
Turnover in last three years	%
Increasing	36
Decreasing	34
Static	26
No response	4

6.12 In considering their turnover, respondents were asked to identify what changes, occurring over the past year, had affected their business. Responses were predominately related to car parking and traffic issues, and included;

- Constant road works and improvements, particularly at Christmas time;
- The introduction of more traffic wardens;
- Parking going to NCP;
- Narrowing of road ways;
- Introduction of new traffic lights systems;
- Constant closure of car parking spaces;
- Introduction of new parking restrictions in certain areas;
- Bad publicity; and
- Increases in rent prices.

6.13 Looking ahead, respondents were reserved regarding their future representation within the St Albans City Centre over the next three to five years, with 72% indicating they expected their representation to stay the same. Some 16% expected to expand their representation, while only 6% expected their representation to contract (Table 6.12).

Table 6.12 Future representation within three to five years	
Future representation	%
Contracting	6
Staying the same	72
Expanding	16
No response	6

Key Problems faced by Businesses

6.14 Businesses were asked to identify the key problems they faced while operating within St Albans City Centre. The results overwhelmingly showed that existing car parking arrangements and problems of traffic congestion were the biggest problems faced by City Centre retailers/businesses and many of the questionnaires incorporated additional comments to emphasis this. Other significant issues raised included low pedestrian flow outside businesses, competition from other centres and under investment in the town centre. The results are set out in Table 6.13. (Note that multiple answers were accepted for this question).

Main Problems	%
Lack of suitable trading space	18
Poor access for deliveries	34
Lack of organisation from the centre organisations	20
Poor quality shopping environment	18
Low pedestrian flows outside your premises	50
Competition from other centres	46
Competition from out of town retail parks	30
Crime and vandalism	12
Under investment in the town centre	30
Inaccessibility of premises	14
Poor public transport services	8
Traffic congestion, parking problems	94
Poor quality of retail offer in general	18

6.15 The above findings show competition from other centre and out-of-town retail parks is a key concern to St Albans retailers and business people. Respondents were asked to identify the centres they perceived to be their key competitors. Centres identified included:

- Harlequin Centre, Watford;
- Galleria, Hatfield;
- Milton Keynes;
- Welwyn Garden City;
- London Colney;
- Hemel Hempstead;
- Berkhamsted;
- North West London, including Brent Cross;

- Bluewater; and
- Harpenden Town Centre.

Facilities and Priorities For Improvement

6.16 The survey shows that, in general, respondents considered the facilities in St Albans to be of average quality for the area. The provision of restaurants/cafes/takeaways was considered to be good, while accessibility by public transport, crime and security measures were considered average. The range of shops and appearance and character of the centre considered to be average. There was a strong belief that access by car and car parking provision were poor, as was traffic congestion. Improving these should be top priority according to the survey respondents (Table 6.14).

Table 6.14 Opinion of St Albans facilities			
Opinion	Good	Average	Poor
Range of shops	28%	52%	20%
Quality of shops	34%	50%	12%
Accessibility by car	4%	20%	76%
Car parking provision	2%	20%	76%
Accessibility by public transport	26%	60%	18%
Range of leisure/recreation facilities	8%	40%	40%
Quality of leisure/recreation facilities	8%	42%	40%
Restaurants/cafes/takeaways	60%	30%	4%
Pedestrian movement	16%	56%	20%
Appearance and character of centre	34%	54%	12%
Crime	14%	58%	12%
Pedestrian facilities	8%	52%	32%
Cleanliness (eg: graffiti, litter, fly-posting)	14%	40%	36%
Traffic and congestion	2%	28%	58%
Security Measures	12%	64%	18%

6.17 Considering the results in more detail, most respondents considered the range (52%) and quality (50%) of shops to be merely average, though there were a greater proportion that considered the provision to be good as opposed to poor. The majority of respondents (54%) thought that the appearance and character of St Albans City Centre was average, though a further 34% thought it to be good. However, in considering cleanliness, 40% considered the graffiti, fly posting, litter etc to be average and a significant 36% considered it to be poor.

- 6.18 In terms of leisure facilities, the proportion of respondents who thought that the quality and range of facilities was average as opposed to poor was broadly similar. Only 8% considered both the range and quality of leisure facilities to be good.
- 6.19 Accessibility other than by car, including public transport and pedestrian facilities, was considered to be average. There was however, an overwhelming majority (76%) who considered that both accessibility by car and car parking provision was poor. This was further reinforced by the strong perception that traffic and congestion was poor (58%).
- 6.20 In terms of priorities for the future, most respondents have emphasised the need for improvements to accessibility, additional car parking spaces, cheaper car parking, and reduced road works, particularly during the day. A range of other responses were given, including:
- better range of upmarket shops;
 - cleaning up of streets/entries into town;
 - introducing free park and ride schemes;
 - CCTV;
 - more leisure facilities, including parks, youth facilities;
 - improvements to Market Place/ back alleys/unsightly shop fronts;
 - pedestrianisation of the centre;
 - advertising/promotion of local facilities;
 - longer opening hours/late night shopping;
 - improving policing;
 - more cultural events;
 - introduction of more independent retailers into the City Centre to prevent St Albans becoming a 'clone town'.

Future directions

- 6.21 Retailers were reserved regarding the current performance of the City Centre, with the majority identifying that they believed that it was performing at an average level. The proportion identifying reasonable performance as opposed to poor performance was identical (20%) (Table 6.15). In terms of the future, the view was mixed, around a third of the respondents considered that the City Centre performance would improve, with similar proportions expecting performance to stay the same or decline (Table 6.16). Table 6.17 sets out the range of reasons, both positive and negative, to support these views.

Table 6.15 City Centre performance	
City Centre performance	%
Excellent	2
Reasonable	20
Average	56
Poor	20
Very Poor	4

Table 6.16 Prospects of the City Centre for next three to five years	
City Centre Prospects	%
Improve	36
Stay the same	30
Decline	34
No Response	2

Table 6.17 Reason for view	
Negative	Positive
People attracted to out of town centres due to easier parking, internet shopping, lack of interesting places in city centre	Pedestrianisation plans, improving safety
Parking (availability, cost)	There is a greater diversity of traders
Attitude of parking attendants	More stable/larger companies
Congestion and access is poor	There would be less disruption to businesses if roadworks were undertaken at night.
Central shops being given to high street retailers – local independents suffer in this climate	Refurbishment of city car parks, change to traffic systems and public footpaths
Becoming a clone town	Plans for St Peters Street should improve things but there needs to be more parking/public transport
Dirty marketplace	Inflow of new retailers
Major stores will relocate to 'out-of-town', unless new car parking facilities are created to replace the lost turn over parking now being removed from service roads.	People moving as it is close to London
Have seen no change over last 10-15 years	Good Location
Increasing number of drunks in and around the town centre	
Specialist shops have been squeezed out by competitors by indifference to their needs and lack of understanding from city administrators.	
Maltings marketing plan is not competitive	
Very little space for new stores	

HARPENDEN TOWN CENTRE

6.22 Of the 180 questionnaires distributed in Harpenden Town Centre, 16 responses were received, giving a response rate of 8.8%. Of these, 88% were from retailers (Table 6.18), with 82% being independent businesses (Table 6.19). Retailers considered themselves to be heavily dependent on the local population, with tourists and local employees making a small contribution to the local economy (Table 6.20). More than half the respondents occupied premises under 1,000 sq ft (Table 6.22) and it was found that nearly 70% of respondents had occupied premises in Harpenden for over 10 years (Table 6.23). The majority (69%) were leaseholders. Therefore, similar to St Albans, the dominant business trend within Harpenden is small, independent businesses of long standing, serving a predominantly local population.

Business Type	%
Retailer	87.5
Restaurant/Café/Takeaway/Pub	0
Professional/Financial Services	6.25
Personal and Other Services	6.25

Business Structure	%
National multiple chain	0
Part of a regional multiple chain	18.75
Independent/ individual business	81.25

Source of business	0-20%	21-40%	41-60%	61-80%	81-100%
Local residents	0	12.5%	6.25%	68.75%	12.5%
People working in the town centre	56.25%	12.5%	12.5%	6.25%	0
Others (Tourists/Visitors)	68.75%	18.75%	0	0	0

Business Type	%
Owner/Freeholder	18.75
Leaseholder	68.75
License/Short term rental	6.25

Table 6.22 Size of Premises	
Size of Premises (overall floor area)	%
Up to 500 sq ft	18.75
501 – 1,000 sq ft	37.5
1,001 – 1,500 sq ft	18.75
1,501 + sq ft	12.5
No Response	12.5

Table 6.23 Number of years in Harpenden/current premises		
Period	Harpenden %	Current premises %
Up to 1 year	16.5	6.25
1 – 5 years	18.75	48
5 – 10 years	12.5	12.5
10 years +	68.75	68.75

Accommodation

- 6.23 Some 82% of respondents were currently happy with their accommodation. Of those that were not completely happy, key complaints included inadequate size and poor condition of premises (Table 6.25). Some retailers planned to undertake refurbishment works, including internal (44%) and external (19%) refurbishment (Table 6.26).

Table 6.24 Satisfaction with accommodation	
Accommodation	%
Satisfied	81.25
Unsatisfied	12.5

Table 6.25 Reasons for dissatisfaction with accommodation	
Reason	%
Too large	0
Too small	18.75
In poor condition	6.25
Lacking suitable servicing	0
Other	6.25

Table 6.26 Plans for refurbishment	
Reason	%
Yes – Internal Refurbishment	43.75
Yes – External Refurbishment	18.75
No	37.5
Other	0

Location

- 6.24 In terms of location of their current premises, retailers and business people were asked to identify the reason why (if any) their trading location was unsatisfactory. Only few responses were received and included a preference to be on the High Street, and in a busier location.
- 6.25 Notwithstanding the above, some 94% of retailers indicated that they did not currently plan to relocate their business (Table 6.27). Only one respondent indicated plans to relocate.

Table 6.27 Plans to relocate	
Plans to relocate	%
Yes	6.25
No	93.75

Turnover

- 6.26 The survey showed that for most respondents, turnover had either been static (31%) or increasing (31%) over the past three to five years. One quarter (4 respondents) indicated a decrease in turnover.
- 6.27 Looking ahead, respondents were conservative regarding their future representation within Harpenden Town Centre, with 94% indicating they expected their representation to stay the same (Table 6.28). Only 6% (one respondent) expected to expand their representation while none of the respondents expected that their representation would contract (Table 6.29).

Table 6.28 Turnover in the last three years	
Turnover in last 3 years	%
Increasing	31.3
Decreasing	25.0
Static	31.2
No response	12.5

Future representation	%
Contracting	0.0
Staying the same	93.7
Expanding	6.3
No response	0.0

Key Problems faced by Businesses

6.28 The issues identified as central to constraining businesses in Harpenden were largely related to traffic, parking and congestion problems, although competition from other centres/retail parks and poor pedestrian flows around premises also featured strongly. In addition, businesses felt strongly about the expense of car parking and how this inhibited business in the town centre. The results are set out in Table 6.30 (Note that multiple answers were accepted for this question).

Main Problems	%
Lack of suitable trading space	6.25
Poor access for deliveries	6.25
Lack of organisation from the centre organisations	0
Poor quality shopping environment	0
Low pedestrian flows outside your premises	43.75
Competition from other centres	62.5
Competition from out of town retail parks	43.75
Crime and vandalism	18.75
Under investment in the town centre	32.0
Inaccessibility of premises	0
Poor public transport services	0
Traffic congestion, parking problems	75
Poor quality of retail offer in general	6.25
No Response	0

6.29 As the above results reveal, competition from other centre and out-of-town retail parks is a primary concern to Harpenden retailers and business people. Respondents identified the following centres as their key competitors:

- St Albans;
- Luton;
- Welwyn Garden City;
- Hatfield, Galleria;

- Redbourn;
- Hemel Hempstead;
- Milton Keynes; and
- Berkhamsted.

Facilities and Priorities For Improvement

6.30 The survey shows that, in general, respondents considered the facilities in Harpenden to be of average quality for the area. This included the range and quality of leisure facilities, public facilities, the range of shops, accessibility by public transport and security measures. The quality of shops was considered to be good, as was the provision of restaurants/cafes/takeaways. Respondents also considered the appearance and character of the centre to be good. There was, however, a strong belief that car parking provision and traffic congestion were poor, and improving these should be a top priority (Table 6.31).

Opinion	Good	Average	Poor
Range of shops	31.25	37.5	31.25
Quality of shops	56.25	37.5	0
Accessibility by car	12.5	31.25	18.75
Car parking provision	18.75	18.75	56.25
Accessibility by public transport	18.75	62.5	6.25
Range of leisure/recreation facilities	18.75	56.25	12.5
Quality of leisure/recreation facilities	12.5	68.75	6.25
Restaurants/cafes/takeaways	68.75	31.25	6.25
Pedestrian movement	12.5	50	6.25
Appearance and character of centre	75	25	0
Crime	37.5	31.25	25
Pedestrian facilities	18.75	75	6.25
Cleanliness (eg: graffiti, litter, fly-posting)	12.5	12.5	12.5
Traffic and congestion	37.5	50	12.5
Security Measures	25	62.5	18.75

Future directions and priorities

6.31 Almost two thirds of respondents believed Harpenden town centre was performing at an average level at present. A further 31% believed the performance was reasonable. This compares with only one respondent who considered that the performance of Harpenden Town Centre was poor (Table 6.32).

6.32 In terms of future prospects, three quarters of the respondents believed that town centre performance would remain the same (Table 6.33).

Table 6.32 City Centre performance	
Town Centre performance	%
Excellent	0.0
Reasonable	31.25
Average	62.5
Poor	6.25
Very Poor	0.0

Table 6.33 Prospects of the City Centre for next three to five years	
Town Centre Prospects	%
Improve	6.25
Stay the same	75.0
Decline	18.75

Table 6.34 Reason for view	
Negative	Positive
High rents may force businesses to close	Harpenden is one of the few remaining towns with individuality – has not yet become a 'clone' town
Greedy landlords forcing rates/rents up – forcing out small businesses and bringing in national multiples	
Things don't change quickly in Harpenden	
Parking too expensive	
Out of town centres causing fewer people to shop in Harpenden	

6.33 Respondents were asked their opinion regarding priority areas for improvement. Responses were overwhelming related to improved car parking provision, the reduction in cost of car parking, as well as the reduction in the cost of business rents/rates. Improvements in security/policing, (including a wider CCTV network), expanding the range of shops and leisure facilities available within the town centre, (particularly opportunities for youth), and improved marketing and use of local events to raise the profile of Harpenden were commonly suggested as priorities.

Conclusions from the Business Survey

- 6.34 The results of the business surveys distributed within St Albans City Centre and Harpenden Town Centre show some similarities. Both centres were characterised by small independent businesses having operated within the centre on a long term basis. Respondents in both centres were of the opinion that their business was largely catering for a local resident population, although local employees and tourists contributed to a small extent to the local economy.
- 6.35 In St Albans, congestion and insufficient parking were raised consistently as problems facing businesses and were identified as the key factor driving people to visit out-of-town centres in preference to the City Centre. In Harpenden, the cost of parking was a more significant issue, though the need for more parking was also raised. In both centres, other key issues facing retailers and businesses included low pedestrian flows and competition from other centre and out-of-town retail parks.
- 6.36 St Albans City Centre has a greater proportion of national multiples, though was still seen as providing a good selection of independent and local businesses, a feature which most respondents appeared to value. Greater promotion of the City Centre as a destination and the improvement of local activities/events etc were seen to be key priorities. Improvements to the range of leisure facilities and the Market Place – both the market activities and the public space itself – were considered likely to help to improve the attractiveness of the City Centre to shoppers and tourists.
- 6.37 Harpenden respondents, on the other hand, were satisfied with the shopping environment which was considered to be of high quality. Greater concerns related to the invasion of national multiples and the subsequent loss of the ‘character’ of the centre and also the implications for business rents/rates. Improvements to crime reduction and the enhancement of leisure facilities, particularly youth facilities, were emphasised by respondents in Harpenden.
- 6.38 There is clearly a strong feeling of ownership and loyalty felt by retailers and business people in both centres, reflective of an established ‘community’. There is recognition of the strengths each centre provides, though there is also a keen awareness of shortcomings and, naturally, many different opinions on the best way to improve. These results will be taken forward and used in the formulation of recommendations for the future of both centres.

7 IN STREET SURVEY RESULTS

- 7.1 A total of 508 face to face interviews were undertaken with users of St Albans City Centre and Harpenden Town Centre to assess how the centres were being used and perceived. The surveys were undertaken between Monday 6 June and Saturday 25 June 2005.
- 7.2 Of the interviews, 300 were undertaken in St Albans (59.1%) and 208 were undertaken in Harpenden (40.9%).

Table 7.1 In Street Survey Sample Composition		
BASE: 508		
Sex:	Male	34%
	Female	66%
Age:	18-34 years	31%
	35-54 years	40%
	55+ years	30%
Socio-economic	ABC1	75%
	C2DE	23%

Retail Facilities

- 7.3 Food shopping was identified by respondents as the key reason for visiting the centres by almost 30% of all interviewees, followed by non-food shopping (17.5%) and working within the centre (15.4%). The second most important reason for visiting each of the centres included non-food shopping (16.5%), food shopping (12.2%) and browsing (11.8%).
- 7.4 Looking more closely at the results, non-food comparison shopping was the dominant reason for visiting the centre (36%) for St Albans respondents, closely followed by food shopping (29.6%). On the other hand, in Harpenden, food shopping was by far the most important reason, with more than 56% of respondents identifying this as the key or secondary reason for visiting the centre, followed by non-food shopping at 31.2%.
- 7.5 Other frequently cited reasons included visiting friends and relatives, accessing financial services and browsing.
- 7.6 According to the survey results, over 60% of all shoppers were visiting their chosen centre more than twice a week. Respondents did not however, access all their retail needs from one centre and identified other important and regularly visited centres. For respondents in St Albans, other centres visited included Watford and 'Other' centres ('Other' responses included London, Barnet, Bedford, Cambridge, Northampton and Welwyn Garden City).

For Harpenden residents, the most important secondary centres included St Albans and Luton.

7.7 Respondents were asked to comment on their likes and dislikes of their centres. Table 7.2 summarises the key answers, based on total response, as well as separating St Albans and Harpenden respondents.

Table 7.2 Likes and Dislikes of Centres			
	Total %	St Albans %	Harpenden %
Likes			
Close to home	21.5	17.7	26.9
Good choice of shops	31.9	37.3	24.0
High Quality Environment	37.8	23.0	59.1
Good choice of eating places	13.0	17.7	6.3
Not too crowded	11.2	7.0	17.3
Feel safe/secure	9.3	5.0	15.4
Dislikes			
Nothing in particular	25.2	24.3	26.4
Lack of parking	19.7	19.0	20.7
Traffic congestion	25.0	29.7	18.3
Too busy/overcrowded	8.5	12.0	3.4
Other*	16.1	17.0	14.9
Don't know	11.6	6.7	18.8
*Issues frequently cited in the 'Other' category included litter, not enough parking, not enough youth facilities, poor roads and no cinema.			

7.8 It is clear from the above results that features of Harpenden which are valued include its high quality environment, its 'local' nature and the ease with which residents can access the centre and the high level of safety perceived within the centre. St Albans, on the other hand, is recognised for its range and diversity of shops and eating places. Similar to the results of the business questionnaire, respondents in both centres expressed considerable concerns over car parking and traffic congestion problems. Further to this, it is worth noting that comments relating to traffic issues were made in the 'Other' category. In a positive light, there were around one-quarter of residents who could not identify anything in particular that they disliked about their centre.

7.9 In terms of improving the centre, some 22% of total respondents didn't see the need for improvements to their centre. This is comparable to the results in Table 7.1 which showed around 25% unable to identify particular dislikes.

7.10 Key improvements that were considered necessary included:

- More/better choice of shops (11.8%);
- Better facilities for pedestrians (12.0%);
- Need better parking (10.4%); and
- 'Other' which included items such as improving traffic flow / congestion, pedestrianisation of the High Street, needing a cinema, allowing fewer cars into the centre and introducing more car parks.

7.11 In improving the range of shops currently available, the most favoured response within St Albans was for a department store, with a preference for John Lewis. In Harpenden, residents were keen to see a hardware store and additional clothing stores such as Next, Jane Norman and Gap. Generally, there was a push for more book stores, additional supermarkets and more stores selling homewares/DIY/furniture goods.

Leisure Facilities

7.12 Some 63% of respondents confirmed that they use leisure facilities within their town. Restaurants, cafes and pubs were the most popular leisure facilities, with at least 55% of all respondents identifying that they use each of these facilities on a regular basis. Other well-used facilities included the gyms/health clubs (23.2%), theatre (14.7%) and The Albans Arena (12.9%).

7.13 When questioned regarding leisure facilities they access outside of their town, cinema facilities were at the top of the list, at 44% in St Albans and 55% in Harpenden. Residents of both centres also regularly access restaurants, cafes and pubs outside their own centres, as well as the theatre. In Harpenden, there appeared to be a demand for youth facilities, with 11% of the respondents accessing both children's entertainment and ten pin bowling facilities outside of Harpenden.

7.14 Table 7.2 identifies the key centre residents *normally* visit to access leisure facilities. Whilst the top response only is given in Table 7.3, it is interesting to note that, for none of the categories, did respondents identify their own town.

Category	St Albans Response		Harpenden Response	
Restaurants	London	30%	St Albans	37%
Cafes	Watford	30%	St Albans	28%
Pubs/bars	Other	36%	St Albans	27%
Gym/health	Other	68%	Luton	42%
Cinema	Hatfield	35%	Hatfield	50%
Theatre	London	57%	London	75%
Amusement Arcade	Hatfield	50%	Luton	40%
Bingo	Don't Know	100%	Luton	100%
Child Entertainment	London	33%	H. Hempstead	52%
Ten Pin Bowl	Watford/Garston	33%	H. Hempstead	35%

7.15 Clearly St Albans is an important source of leisure facilities for Harpenden residents, particularly in the case of evening economy activities. Luton and Hemel Hempstead also feature strongly when it comes to children/youth entertainment and health facilities. Residents of Harpenden are clearly prepared to travel a little further to access facilities such as cinemas and theatres.

7.16 St Albans residents appear to use a wider range of centres to access leisure needs, though London featured several times, particularly for theatres, restaurants and child entertainment. Hatfield is clearly the closest location for both St Albans and Harpenden residents to access cinema facilities.

7.17 The survey results show that respondents generally visited cafes and pubs/bars on a weekly basis, while visits to restaurants, theatre, bingo and children's entertainment was more likely to take place on a monthly basis. Less frequent were visits to amusement arcades, cinema and ten pin bowling. It was only visits to health clubs/gyms that were undertaken more frequently than once a week.

8 ST ALBANS CITY CENTRE HEALTH CHECK

8.1 This section assesses the health of St Albans City Centre, using a selection of indicators of viability and vitality outlined in PPS6 – Planning for Town Centres (2005). The PPS6 indicators of vitality and viability are:

- Diversity of main town centre uses;
- Retailer representation and intentions to change representation;
- Shopping rents;
- Proportion of vacant street level property;
- Commercial yields on non-domestic property;
- Pedestrian flows (footfall);
- Accessibility;
- Customer and resident's views and behaviour;
- Perception of safety and occurrence of crime; and
- State of the town centre environmental quality

8.2 Vitality is generally considered to be the degree to which a town is busy, lively, visited and represented by a variety of activities. Measures of vitality include the range of services available and environmental qualities.

8.3 Viability is a measure of the town centre's economic health and its consequential ability to attract investment and maintain its fabric. Viability indicators include shop vacancy rates and commercial properties yields.

8.4 The St Albans City Centre Health Check has been prepared utilising a variety of data sources as well as our own town centre floorspace survey (**Appendix 6**), Centre Floorspace Surveys, GL Hearn 2005. Experian Goad provides a reliable source of up-to-date information on town centre composition and retailer representation. Focus Reports, both Town Centre and Retailer Requirement Reports (**Appendix 2**) have been used to understand the level of retail requirements within the City Centre and the current and historic prime rental levels while the Property Market Report published by the Valuation Office has been used for data on retail property yields. Qualitative characteristics are determined through site visits and a thorough inspection of the town centre, to note environmental quality and accessibility as well as to provide a general understanding of the functioning of the town centre, key pedestrian areas, weaknesses etc.

Diversity of Uses

8.5 St Albans City Centre is the principal shopping destination within St Albans District, with other market towns and smaller town centres providing a more localised service. These are organised into a retail hierarchy within the St Albans District Local Plan, with St Albans City Centre at the top of the hierarchy as a Major Sub-Regional Centre.

8.6 Our survey of St Albans City centre identified the following main primary and secondary shopping streets in St Albans to be:

<u>Primary</u>	<u>Secondary</u>
Market Place	London Road
The Maltings Shopping Centre	Victoria Street
Chequer Street	George Street
High Street	Verulam Road
St Peters Street	Catherine Street
Christopher Place Shopping Centre	
French Row	

8.7 The shopping streets identified above and other shopping streets in the City centre are shown on **Map 2** – St Albans City Centre Plan. For the purposes of this Study and for the consideration of future applications we would recommend that the primary and secondary shopping frontages identified should form the town centre boundary for the purposes required by PPS6.

8.8 The main retail focus within St Albans City Centre is divided between the Market Place and The Maltings Shopping Centre. Market Place is a pedestrianised area, stretching from High Street as a narrow alley between retail units, to St Peters Street, where it widens into a large open paved space. The wider paved area is used for regular market stalls twice weekly and a farmers market once a month; at other times the space is used as an informal meeting place and pedestrian area. It has very limited opportunities for sitting/resting and is sparsely vegetated.

8.9 The Maltings Shopping Centre is a 1980's open-air shopping development, located on the corner of Chequer Street and Victoria Street. Key multiple retailers including H&M, Cargo, New Look, Body Shop, Top Shop, River Island, Jessops, Clinton Cards and Wilkinson are located within the centre, along with various specialist retailers and cafes. It is an attractive and modern centre, supported by a multi-storey car park and can be accessed from both Chequer or Victoria Streets.

- 8.10 Christopher Place is a pedestrianised shopping area which has been recently refurbished, it includes a number of small high order multiple retailers including Bang & Olfsen, Crabtree and Evelyn, the White Company, Hobbs, LK Bennett and French Connection. This development also has restaurants/cafes including Wagamamma's and Carluccios and a Fitness First health club at first floor level.
- 8.11 A number of major high street retailers are located within the City Centre, including Marks and Spencer, Boots, British Home Stores, Woolworths and Argos. These stores are located in close proximity, mainly along St Peters Street. London Road, Holywell Hill, George Street, Verulam Road and Catherine Street offer a more specialised retail experience, hosting some of the City's long standing family businesses. These retailers compete with national multiples by providing a more personalised service which is favoured by local residents.
- 8.12 Food retailing in the City Centre is predominantly 'top-up' oriented, being limited to a Tesco Metro and a Marks and Spencer Foodhall, although the market (run on Wednesday and Saturday) provide some fresh produce including fresh fruit and vegetables, meat, fish and bakery items. A Farmers Market is also held once a month in the Market Place, offering locally produced and organic fresh produce including fruit and vegetables, meat, dairy and a range of homemade goods.
- 8.13 The City also boasts a historic core, focused on the City Cathedral and characterised by its high proportion of historic buildings which contain a wide range of specialist shops and restaurants.
- 8.14 The GLH survey of St Albans shopping area (as defined on **Map 2** - St Albans City Centre Plan by the floorspace survey boundary) shows the retail composition of the Centre, as follows:

Table 8.1 St Albans– Town Centre Composition by Unit		
	Units	%
Convenience	15	4.0
Comparison	192	51.8
Service	148	39.9
Vacant	16	4.3
Total	371	100.0

Source: **Appendix 6** – Centre Floorspace Surveys, GLH (August 2005)

- 8.15 The town centre floorspace survey (**Appendix 6**) highlighted 16 vacant units (August 2005) whereas the Goad Plan for St Albans dated February 2005 identified 22 vacant premises. The Goad Plan area and GLH's survey area were broadly consistent and therefore this illustrates a reduction in vacant premises over the six month period February to August 2005 of 6 units. Thus demonstrating strong demand for floorspace within the town centre.
- 8.16 It should be noted that the floorspace survey area used by GLH may differ slightly from the retail frontages reviewed in the Council's annual Shopping Monitoring Report. Therefore, there may be differences between the two surveys in respect of unit numbers and percentage composition statistics.

Retailer Representation and Intentions to Change Representations

- 8.17 There are a relatively large number of multiple outlets within St Albans town centre. These include Marks and Spencer, Bhs, Woolworths, WH Smith, Boots, Superdrug, Dorothy Perkins, Argos, Clarks, River Island, Next, Dixons, Lloyds Pharmacy, Wilkinson, New Look, Top Shop, Woolworths, TK Maxx and HMV. These are generally concentrated along Market Place, within the Maltings Shopping Centre and on St Peters Street.
- 8.18 Smaller, specialist retailers catering to a more affluent market are concentrated at the High Street/London Road end of the City Centre, and are complemented by a range of upmarket restaurants, cafes and service uses. Two additional shopping arcades are located in this area, including the Heritage Close Shopping Centre, which is occupied predominantly by clothing retailers and restaurants, and a smaller arcade incorporating a beauty salon, clothing repair service, florist, Belgium chocolate retailer and café.
- 8.19 The retail floorspace at the Catherine Street end of the City Centre is generally dated and of poor quality. Almost half of the total vacant outlets within the City Centre are located along Catherine Street. There has, however, been an uptake of retail floorspace in this location very recently and some refurbishment activity of other outlets, anticipated to encourage further improvements along this street as retailers seek to improve their competitive standing within the City Centre.
- 8.20 The Focus Report for St Albans (**Appendix 2**) reveals the demand for retail premises in the town since 1994. The following table (Table 8.2) indicates that there is a strong demand for retailer representation in St Albans, growing considerably since 2000, fluctuating during 2003-2004, and strengthening again most recently.
- 8.21 The Retailer Requirements Focus Report (**Appendix 2**) indicates that there are retailer requirements in St Albans for a mix of convenience, comparison and retail service operators

across the spectrum from value retailing to high order multiples. Registered requirements on Focus include East women's wear (1,250–1,750 sq ft), Elvi women's wear (1,500 sq ft), Massimo Dutti clothing (300 – 500 sq ft), Peacocks department store (5 – 15,000 sq ft), TJ Hughes department store (25 – 150,000 sq ft), Lakeland household goods (4 – 6,000 sq ft), Toys 'R' Us (33,500 sq ft), , Pier Homewares (7,000 sq ft), Cotswold Company furniture (4 – 7,000 sq ft), Maplin Electronics (2,500 – 5,000 sq ft), Superdrug (1,500 – 6,000 sq ft), Aldi (14,600 sq ft), Farmfoods (5 – 8,000 sq ft), Julian Graves healthfood (400 – 1,000 sq ft) Oddbins off licence (1,200 – 2,500 sqft). It is clear from these requirements, that there is strong demand for a range of unit sizes within St Albans City Centre.

Table 8.2 Town Centre Retailer Requirements		
Date	St Albans	Harpenden
Apr 05	110	23
Oct 04	102	22
Apr 04	107	18
Oct 03	119	17
Apr 03	101	17
Oct 02	89	12
Apr 02	88	10
Oct 01	78	10
Apr 01	77	4
Oct 00	74	6
Apr 00	65	6
Oct 99	63	7
Apr 99	57	4
Oct 98	65	6
Apr 98	63	7
Oct 97	57	4
Apr 97	64	0
<i>Source: Town Focus Report – Appendix 2</i>		

Shopping Rents

8.22 The latest Focus Report for St Albans provides the most up-to-date prime rental levels. The following data shows a steady increase in rental level for retail Zone A in St Albans. Comparable data for Harpenden was not available.

Year	St Albans	Harpenden
2005	115.00	n/a
2004	115.00	n/a
2003	115.00	n/a
2002	110.00	n/a
2001	110.00	n/a
2000	110.00	n/a
1999	110.00	n/a
1998	110.00	n/a
1997	110.00	n/a
1996	100.00	n/a
1995	90.00	n/a

8.23 Zone A rents in St Albans have reflected the earlier pattern of increasing rents, showing a strengthening of demand for retail floorspace over time within the town centre. This is reinforced by the following table which shows a growing demand for retailer representation.

Proportion of Vacant Street Level Properties

8.24 The number of vacant units in the St Albans City centre is identified in the retail composition table earlier (Table 8.1). In February 2005, Experian Goad reported 22 vacant units. This translates into 5.6% of total units within the centre and compares with the GB average of 10.2%. The floorspace survey of St Albans (**Appendix 6**) undertaken by GL Hearn in August 2005, recorded 16 vacant units (or 4.3%) a fall of 6 units. The survey areas for both are broadly consistent and the statistics are therefore comparable.

8.25 The recent uptake of vacant units and changes of occupier between February and August 2005 is set out in Table 8.4 below.

Address	Occupier Name	Occupier Business
18 The Maltings	H&M	Clothing retailer
1 Canberra House	Bairstow Eves Real Estate	Estate Agent
23 High Street and 22,23 Hertiage Close	Emporio Homes	Homeware retailer
18 George Street	Terracotta Slate and Stone	Specialist retailer
6 Market Place	Sony Centre Connect	Electronics retailer
Waterend barn & restuarant	Lloyds bar	Restaurant
47 Catherine Street	Chantilly Interiors	Interior Decorators
49-51 Catherine Street	City Food and Wine	Convenience Store
53 Catherine Street	Barber	Mens Hairdresser

Commercial Yields

- 8.26 Prime retail yields can provide an indication of investor's long term confidence in the profitability of commercial property in a town centre. Yield represents a return (in the form of rent) to an investor. Yields are expressed in percentage terms to facilitate comparison between other investment options and other investment properties in different locations.
- 8.27 Generally, when an investor considers the prospect for rental growth from an investment are good, he will be prepared to pay more for a particular property and the initial yield accepted is lower in anticipation of rising future income (rent). Conversely a high yield is generally reflective of lower investor expectations or confidence in rental growth and concern over potential void periods and letting difficulties. A consideration of yields on shop investments can therefore be of assistance in assessing the general economic prospects of a trading location.
- 8.28 The Summer 2005 Property Market Report published by the Valuation Office provides time series data on retail property yields. The yield information from Autumn 1998 to Summer 2004 for St Albans is set out in the table below.

Date	07/05	01/05	07/04	01/04	04/03	10/02	04/02	10/01	04/01
St Albans	5.75	5.75	5.75	5.75	5.75	5.75	5.75	5.75	5.75
Harpenden	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00
Watford	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50
Hemel. H	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00

Date	10/00	04/00	10/99	04/99	10/98	04/98	10/97	04/97	10/96
St Albans	5.75	5.75	5.75	5.75	5.75	5.75	5.75	5.50	5.50
Harpenden	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	7.50
Watford	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50
Hemel. H	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00

Source: Summer 2005 Property Market Report.

- 8.29 The retail property yield for St Albans has remained stable and low over time, indicating strong investor confidence in the City as a retail property investment location.
- 8.30 In comparison with other towns in the Region, St Albans's yield is slightly above Watford (5.50%), slightly below Hemel Hempstead (6.00%), and well below Harpenden (8.00%).

Pedestrian Flows

- 8.31 Pedestrian footfall within St Albans City Centre is generally good on the primary shopping streets. Observations suggest that the busiest parts of the town centre are around Market Place, The Maltings Shopping Centre and along St Peters Street.
- 8.32 There is also a pedestrianised area located outside of The Alban Arena, which is located between Government Buildings including the District Council offices and Courts. This area also appeared well pedestrianised as people use it to short-cut through the City Centre.

Accessibility

- 8.33 Public transport facilities are reasonably well located in relation to the town centre shopping area. There are two railway stations, the City (Thameslink) Station with trains to Bedford in the north and London through to Brighton in the south. Both Gatwick and Luton Airports can be accessed on this line. The Abbey Station (Silverlink) serves the Watford Junction line.
- 8.34 Bus services run through the town centre, predominantly along St Peter's Street. A limited number of services also service London Road, Victoria and Catherine Streets.
- 8.35 Car parking within the town centre is a mix of on-and-off-street parking. Off street shopper car parking is reasonably well sign posted around the town and is located at the following principal locations:

Car Park Location	No. of Spaces	Type of Car Park	Comments
Adelaide Street	30	Surface	
Bricket Road N 1 & 2	27	Surface	
Civic Centre (ground floor and upper level)	256	Multi-storey	Not available to the public Monday to Friday (daytime). Two disabled spaces.
Civic Centre (basement)	114	Multi-storey	
Drovers Way	391	Multi-storey	Lower level (106 spaces) closed to public on Wednesday and Saturday
Gombards	88	Surface	Part closed to the public on Wednesdays and Saturdays for market traders.
London Road (Hart Road)	84	Surface	
London Road (Keyfield Terrace)	132	Surface	
Russell Avenue	591	Multi-storey	
Bricket Road (HCC)	50	Surface	Saturday only.
Christopher Place (NCP)	145	Multi-storey	Two disabled spaces.
The Maltings (NCP)	740	Multi-storey	
Rear of Marks and Spencer, Drovers Way	40	Surface	2 disabled spaces.
Oaklands College	148	Surface	Saturday only/4 disabled spaces
Total Spaces (Mon, Tues, Thurs & Fri)	2382		
Total Spaces (Wed)	2276		No of spaces unavailable in Gombards car park is unknown.
Total Spaces (Sat)	2730		No of spaces unavailable in Gombards car park is unknown.

- 8.36 In terms of cycle accessibility and facilities, the town centre is linked into the town's network of cycle paths and cycle routes are also signposted along several minor roads.

Customer and Resident's Views and Behaviour

- 8.37 An in-street survey was undertaken within St Albans City Centre to assess how the centre is being used and perceived. A total of 300 face-to-face interviews were undertaken in St Albans City Centre between Monday 6 June and Saturday 25 June 2005.
- 8.38 Chapter 7 provides a summary of the results of the in-street survey which explores key reasons for visiting St Albans, likes and dislikes of the centre and gaps in the retail and leisure provision in the centre. Full survey results are provided in **Appendix 5**.

Perceptions of Safety and Occurrence of Crime

- 8.39 St Albans Crime and Disorder Reduction Partnership undertook an audit of the levels of crime and disorder, anti-social behaviour and drug offences in the City and District and has consulted on people's experiences of crime issues. The audit covered a three year period, 2001-2004.
- 8.40 During the audit period, a total of 30,378 crimes were recorded in St Albans City and District. The most frequently occurring crimes included:

Category	Offences	% of total crime
Other theft and handling	7,307	24
Theft from a motor vehicle	5,334	18
Criminal damage	5,342	18
Violence against the person	2,865	9

- 8.41 Within the most recent year, 2003/04, a similar crime profile was recorded with other theft and handling (26%) being the most frequently occurring crime, followed closely by theft from a motor vehicle (23%), criminal damage (18%), burglary (15%) and violence against the person (15%).
- 8.42 Consultation results regarding perception of crime revealed that respondents considered St Albans District to be a location with fewer crime problems than the average of other districts within Hertfordshire. Respondents considered the worst problems within St Albans to be:

- People sleeping on the streets;
 - People using/dealing drugs;
 - People being drunk/disorderly;
 - Race/religious inspired attacks;
 - Abandoned and burnt out vehicles;
 - Vandalism, graffiti and deliberate damage;
 - Youths hanging around;
 - Rubbish/litter lying around; and
 - Road safety.
- 8.43 The most recent MORI survey (2002) found that most residents (98%) feel safe or very safe during the day and two-thirds of residents feel very or fairly safe after dark. This represented a 7% increase on past results and exceeded the national trend.
- 8.44 Where crime issues could be improved, residents identified the following improvements as of high importance:
- More police foot patrols;
 - More activities for youth; and
 - Improved road safety.

Environmental Quality

- 8.45 The environmental quality of St Albans City Centre is being enhanced with the implementation of the St Albans City Centre Road Safety Scheme, after winning funding from the Department of Transport for a special road safety scheme.
- 8.46 The St Albans City Centre Road Safety Scheme will improve road safety, reduce road accidents, improve conditions for pedestrians, shoppers, market traders and businesses, improve accessibility for disabled people and improve the attractiveness of the streetscape.
- 8.47 Works are currently underway on St Peters Street, and will continue until the end of October 2005. Works will commence again in the New Year, to avoid disruption to the busy Christmas shopping period. It is understood that the first phase of the scheme, including improvements to the Peahen Junction, the taxi rank and pedestrian works on Hatfield Road and Catherine Street have been completed.
- 8.48 The town centre benefits from a wide coverage by CCTV.

Conclusions on the Health of St Albans City Centre

- 8.49 The health check of St Albans has revealed a healthy and vibrant City Centre, functioning at a level appropriate to its major sub-regional centre status. The Centre provides a very good range of multiple and independent retailers, from discount to high end retailers, catering to all budgets and lifestyle choices as expected in a centre of its size. There remains a strong demand for retail floorspace within the City Centre, which is further reinforced by commercial yield results which indicate strong and stable investor confidence over time. Rental levels have shown a strengthening in recent times and vacancy rates are dropping, both of which support the conclusion that St Albans is a healthy and vital centre.
- 8.50 The centre is easily accessible, via public transport or private vehicle, with a range of bus routes running through the centre and various on- and off-street parking opportunities. The environmental quality in St Albans is average at present, with a low provision of parkland/greenery and opportunities for 'casual' social interaction, with limited street furniture and public spaces. The current pedestrian and road improvement works along St Peter's Street will go some way to create an improved shopping environment, however, it is considered that there is further opportunity to make additional environmental improvements within the City Centre.

9 HARPENDEN TOWN CENTRE HEALTH CHECK

- 9.1 This section assesses the health of Harpenden town centre, using the same selection of indicators of viability and vitality outlined in PPS6 – Planning for Town Centres (2005) as those used for St Albans City Centre as indicated at paragraph 8.1.
- 9.2 Harpenden is the second largest settlement in the St Albans District, located approximately half way between St Albans and Luton. With good transport links into London and surrounding towns, a large proportion of Harpenden’s residential population commutes to other centres during the working week.
- 9.3 The proportion of vacant outlets is well below the national average at 3.6% (GB average 10.2%), suggesting a good level of retail demand in Harpenden.

Diversity of Uses

- 9.4 Harpenden functions at the Minor District level, catering for the convenience and weekly grocery shopping needs of residents, as well as providing a small range of comparison goods and services. Residents of Harpenden would travel to St Albans and other larger centres to access a wider range of comparison goods and higher order services.
- 9.5 The retail centre of Harpenden is linear in nature, focused on the traditional High Street layout. The High Street is therefore the Primary Shopping Frontage. Secondary shopping frontages include Station Road, Vaughan Road and Leyton Road. These shopping areas are shown on **Map 3** – Harpenden Town Centre Plan. Harpenden is an attractive centre, with retail offer aimed at a more affluent market.
- 9.6 GL Hearn’s floorspace survey of Harpenden (**Appendix 6**) shows the retail composition of the Town centre, as follows:

	Units	%
Convenience	11	6.5
Comparison	63	37.3
Service	89	52.7
Vacant	6	3.6
Total	169	100.0
<i>Source: GLH Survey (July 2005) – Appendix 6</i>		

9.7 Again, as with the survey of St Albans it should be noted that there may be slight difference in the retail survey frontages surveyed as part of this assessment and the Council's annual retail monitoring report for Harpenden. The floorspace survey boundary used by GLH for their survey work is shown on **Map 3** – Harpenden Town Centre Plan.

9.8 The above results show that Harpenden has high proportion of service uses (53%) reflecting the wide range of cafes, pubs and restaurants which characterise Harpenden town centre. As a consequence there are lower than average proportions of convenience and comparison outlets within the Town. The proportion of vacant outlets in Harpenden is low at 3.6% (the GB average is 10.2%), suggesting a good level of retail demand in Harpenden.

Retailer Representation and Intentions to Change Representation

9.9 There is a limited representation of multiples present in the town centre, including Boots, Argos, Marks and Spencer, Sainsburys, Waitrose and WH Smith. Otherwise, Harpenden town centre incorporates a range of smaller independent retailers, many of which cater to the more affluent market sectors. As shown in Table 9.1, Harpenden town centre also includes a high proportion of beauty and personal services, cafes, pubs and restaurants as well as legal and business office space.

9.10 The Focus Report for Harpenden (**Appendix 2**) provides time series data on the demand for retail premises in the town since 1994. Demand for representation in Harpenden is growing, albeit at a significantly lower level and slower rate than the retailer demand exhibited for St Albans.

Table 9.2 Town Centre Retailer Requirements		
Date	St Albans	Harpenden
Apr 05	110	23
Oct 04	102	22
Apr 04	107	18
Oct 03	119	17
Apr 03	101	17
Oct 02	89	12
Apr 02	88	10
Oct 01	78	10
Apr 01	77	4
Oct 00	74	6
Apr 00	65	6
Oct 99	63	7
Apr 99	57	4
Oct 98	65	6
Apr 98	63	7
Oct 97	57	4
Apr 97	64	0

- 9.11 The Retailer Requirement Focus Report for Harpenden (**Appendix 2**) shows retailer requirements from a mix of convenience, comparison and retail service uses. These requirements include: Superdrug (1,500 – 6,000 sq ft), Robert Dyas (2,000 – 3,000 sq ft), Edinburgh Woollen Mill (2,000 sq ft), Fat Face Ltd (1,500 sq ft), Oddbins (800 – 2,500 sq ft), Costa Coffee (750 – 2,000 sq ft) and Starbucks (700 – 1,800 sq ft).

Shopping Rents

- 9.12 Discussions with the local commercial agents have confirmed that within Harpenden's prime frontage Zone A rents of £80 are achievable. This figure drops to low £30's for secondary frontages and to approximately £12psf (ITZA) for tertiary locations.

Proportion of Vacant Street Level Properties

- 9.13 The number of vacant units in the Harpenden Town Centre is identified in Table 9.1. The floorspace survey, undertaken in July 2005, recorded six vacancies (3.6%) which is considerably lower than the GB average of 10.2%. Historical data dating back to 1987 shows that the number of vacant premises within the town centre have remained relatively constant over time, at around 5 or 6 outlets.

Commercial Yields

- 9.14 Prime retail yields can provide an indication of investor's long term confidence in the profitability of commercial property in a town centre. Yield represents a return (in the form of rent) to an investor. Yields are expressed in percentage terms to facilitate comparison between other investment options and other investment properties in different locations.
- 9.15 Generally, when an investor considers the prospect for rental growth from an investment are good, he will be prepared to pay more for a particular property and the initial yield accepted is lower in anticipation of rising future income (rent). Conversely a high yield is generally reflective of lower investor expectations or confidence in rental growth and concern over potential void periods and letting difficulties. A consideration of yields on shop investments can therefore be of assistance in assessing the general economic prospects of a town.
- 9.16 The Summer 2005 Property Market Report published by the Valuation Office provides time series data on retail property yields. The yield information from Autumn 1998 to Summer 2004 for St Albans and Harpenden is set out in the table below.

Date	07/05	01/05	07/04	01/04	04/03	10/02	04/02	10/01	04/01
St Albans	5.75	5.75	5.75	5.75	5.75	5.75	5.75	5.75	5.75
Harpenden	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00
Watford	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50
Hemel. H	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00

Date	10/00	04/00	10/99	04/99	10/98	04/98	10/97	04/97	10/96
St Albans	5.75	5.75	5.75	5.75	5.75	5.75	5.75	5.50	5.50
Harpenden	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	7.50
Watford	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50	5.50
Hemel. H	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00

Source: Summer 2005 Property Market Report.

- 9.17 The yield for Harpenden has been stable, albeit at a higher rate than St Albans.
- 9.18 In comparison with other towns in the Region, Harpenden's rate yield is above Watford (5.50%) and Hemel Hempstead (6.00%), and comparable to that of Borehamwood (8.00%).

Pedestrian Flows

- 9.19 Observations suggest that the highest pedestrian flows are along the High Street, particularly around Sainsburys and along the High Street to Station Road. Station Road also supports a high level of pedestrian traffic with commuters using this route to access the railway station.
- 9.20 Given the small size of Harpenden centre, residents appear to park centrally and access their choice of shops and services, or park close to the facilities they require.

Accessibility

- 9.21 Harpenden offers a good level of accessibility with a range of public transport options as well as a mix of on-street and off-street parking facilities.
- 9.22 Frequent bus and coach services provided by various operators, link Harpenden with surrounding villages and towns including St Albans, Welwyn Garden City and Berkhamsted. Bus services also link with Thameslink rail services and Luton Airport.

- 9.23 On street parking is available on both sides of the High Street and on the secondary shopping streets, conveniently located with respect to the majority of the high street shopping facilities. Dedicated off street car parking is provided at six car parks located around the town centre, these are detailed within the table below.

Car Park Location	Number of Spaces	Type of Car Park	Comments
Bowers Way East	152	Surface	Pay & Display
Bowers Way West	165	Surface	Pay & Display
Waitrose	120	Surface	Barrier controlled customer car park
Lyddeker	120	Surface	Pay & Display
Amenbury Lane	220	Surface	Pay & Display
Station (BR)	250	Surface	Pay & Display
TOTAL	1,027	Surface	

Perceptions of Safety and Occurrence of Crime

- 9.24 A summary of the audit undertaken by St Albans Crime and Disorder Reduction Partnership was provided within the St Albans City Centre Health Check. This audit covered the St Albans City and District which includes Harpenden. The results presented in Chapter 8 are therefore, relevant in this case and will not be duplicated here.

Environmental Quality

- 9.25 The environmental quality of Harpenden is high. A central network of parkland along the High Street creates a green 'village' atmosphere, which is complemented by other small pockets of parkland and vegetation. The streets are well maintained and there are various safe opportunities for sitting, resting and meeting along the High Street, with a good provision of seats and benches. There is also a good provision of pedestrian crossing, creating a pedestrian friendly environment and slowing traffic along the High Street.
- 9.26 The centre also benefits from a CCTV network.

Conclusions on Health of Town Centre

- 9.27 Based on the above investigations, it is concluded that Harpenden is a vital and vibrant centre. The attractive and busy centre provides a very good range of multiple retailer representation for its status as a Minor District Centre, and Focus Reports indicate that there is a growing demand for retail floorspace within the centre. The presence of higher end retailers, both multiple and smaller independents, indicates that the centre caters to a

more affluent market. Further to this, the low vacancy rates and high environmental quality are indicative of a healthy and popular centre, and a centre that is adequately meeting the weekly and convenience needs of residents.

- 9.28 One of the principal matters which arose in discussions with local agents, and from meetings held with representatives of Harpenden Town Council was the issue of rising rents. This issue is exacerbated because the majority of the town core is held in just two ownerships. It is considered locally that rising rents are a result of landlord's expectations as opposed to a reflection of increased demand (and thus increased rental value). It appears the perception of Harpenden businesses is that rising rent is the principal reason for a number of voids in the town and that the continued rise in retail rents will threaten the viability of a number of the smaller independent operators within the town and as a result have a detrimental effect upon vitality and viability.

10 REVIEW OF NEIGHBOURHOOD CENTRES

Introduction

10.1 In this section we review the role and composition of the District's neighbourhood shopping centres. The centres reviewed are: -

London Colney	Redbourn
Marshalswick (St Albans)	Southdown (Harpenden)
Wheathampstead	Verulam
Fleetville (St Albans)	

10.2 These centres are smaller than both St Albans and Harpenden and there is limited published commercial data to enable a full health check to be prepared. Therefore these centre reviews are based upon street survey work and observations as to their content and usage.

10.3 The composition of each of the Neighbourhood Centres in terms of convenience, comparison (durable), service, vacant and other units, together with the convenience and comparison floorspace is provided within the detailed floorspace surveys included at **Appendix 6**. These surveys sought to include all retail and retail service (A2, A3) uses and also recorded other non 'A' Class uses such as offices. They did not however record the residential uses which are mixed within the retail frontages of these Neighbourhood Centres. It must also be noted that the surveys undertaken may not be consistent with the designated frontages referred to within the Council's Shopping Monitoring Report.

London Colney

10.4 London Colney lies in the south of the District north of Junction 22 of the M25, close to the Colney Field Retail Park.

10.5 London Colney shopping provision is focused upon High Street and Haseldine Road. Retail provision on High Street is mixed with residential and office premises and extends to approximately 750m. Haseldine Road's retailing comprises a purpose built post War parade of shops with residential above and a small supermarket. Our August 2005 floorspace survey results indicate the following composition. The floorspace survey is provided in full at **Appendix 6**.

Table 10.1 London Colney – Composition August 2005		
Goods Outlets	Number of Units	Percentage Composition
Convenience	8	23.5%
Comparison	5	14.7%
Service	15	44.1%
Vacant	6	17.6%
Total	34	100.0%
<i>Source: GLH Floorspace August 2005</i>		

- 10.6 Convenience goods floorspace within the centre totals 622 m² (6,695 ft²). The majority of this floorspace is contained within two stores, namely Co-op on Haseldine Road (230m²/2,475ft²) and Tesco Express on High Street (181m²/1,950 ft²). Both of these supermarkets are primarily used for daily needs and top up food shopping rather than weekly shopping needs.
- 10.7 In addition to these two stores, there are six other convenience goods retailers in London Colney including a baker, a butcher and four general stores/off licence/Confectioner Tobacconist Newsagent (CTN).
- 10.8 Comparison floorspace and outlet numbers in London Colney are low, there are 5 outlets with a total sales are of 252 m² (2,710 ft²). The comparison offer is limited, including only a fishing tackle shop, a diving shop, a hardware store, a florist and a chemist. The fishing tackle and dive stores are specialist and are likely to draw customers from wide catchments whilst the other comparison retailers serve a locally based population.
- 10.9 Service facilities within the centre are reasonably good and comprise the largest proportion of uses in the centre. There are a number of public houses, restaurants and take away food outlets and there is no bank or building society within the town, however both the Tesco and Co-op stores have ATMs.
- 10.10 The vacancy rate in London Colney is 17.6% of the total number of units in the town.
- 10.11 The town centre is accessible by bus, with bus stops along High Street. Bus numbers 602, 632 and 84 pass along High Street and provide links with St Albans, South Mimms, Potters Bar and Barnet. Car parking is allowed in places along High Street and there is an off street car park adjacent to the Co-op store in Haseldine Road.
- 10.12 In overall terms the centre was reasonably busy, benefiting from both local walk-in trade and passing vehicular trade.

- 10.13 Its designation as a Neighbourhood/District Centre is appropriate for a centre of the size and composition of London Colney.
- 10.14 Whilst not part of London Colney Neighbourhood Centre, the Colney Fields Retail Park which is located less than 2km from London Colney will serve the food shopping and comparison shopping needs of the local catchment. The Sainsbury store at Colney Fields is large and has an extensive food and non food range. Food shopping is further supplemented by the M & S store. Comparison goods shopping provision at Colney Fields is also extensive. In addition to the non food comparison goods available in Sainsburys and M & S there are five other large space units occupied by national multiple comparison goods traders and unusually for an out of centre retail park there is no restriction requiring the sale of only bulky comparison goods.
- 10.15 Colney Fields is an out-of-centre retail park and whilst it has extensive retail floorspace, it lacks service and other uses which comprise a town, district or local centre. It should not therefore be given a formal designation within the hierarchy of centres in St Albans City and District, to do so would lend support to future expansion of this out-of-centre facility.

Redbourn

- 10.16 Redbourn is located in the north west of the district, east of the M1 and is by-passed by the A5183.
- 10.17 The centre of Redbourn is focused upon High Street, where A1 retail and A2 and A3 provision is mixed with residential and office uses. Within the town centre there are a number of attractive historic buildings and these are interspersed with more recent infill units.
- 10.18 Redbourn High Street is generally narrow and on street car parking exacerbates this narrowness, leading to 'pinch points' and traffic congestion.
- 10.19 Retail provision within the centre was recorded by GL Hearn in August 2005, the floorspace survey is provided at **Appendix 6** and the centres composition is summarised below:-

Goods Outlets	Number of Units	Percentage Composition
Convenience	6	18.2%
Comparison	8	24.2%
Service	14	42.4%
Vacant	5	15.2%
Total	33	100.0%

Source: GLH Floorspace August 2005

- 10.20 The main convenience store in Redbourn is a Co-op supermarket. This has a sales area of 107m² (1,150 ft²) and performs primarily a top-up/everyday convenience shopping function. Convenience shopping is bolstered by five other traditional convenience goods stores comprising two butchers, one bakers, a Confectioner Tobacconist Newsagent (CTN)/Grocer and an off licence. The total convenience goods floorspace within Redbourn town centre is 319 m² (3,438 ft²).
- 10.21 Comparison goods shopping provision within the town is a mix of specialist comparison goods, (e.g Saddler and tack shop, interior design and antiques) and local comparison goods shopping, (e.g. florist, stationer). The eight comparison goods retailers collectively have a sales area of 557m² (6,000 ft²).
- 10.22 Redbourn's largest proportion of outlets are service providers. This includes a number of public houses, restaurants and cafes as well as beauty and hair salons and estate agencies. In total there are 14 units and these comprise 42% of the overall composition of the town.
- 10.23 Redbourn does not have a bank or building society branch, however the Co-op store has an ATM for cash withdrawals and the post office provides a personal banking service.
- 10.24 There are five vacant properties within Redbourn and this is equivalent to 15% of all units in the town. There is one notable vacant property in Redbourn at 21 High Street, this property which was formerly a public house is at the southern entry point to the town centre and its poor condition detracts from the overall feel of the centre.
- 10.25 Accessibility to Redbourn is good, there are a number of local bus services which use High Street (320, 34, 35, 345 and 46). This links Redbourn to the larger centres of St Albans, Harpenden, Hemel Hempstead, Dunstable and Luton.
- 10.26 Car parking is permitted on street along High Street and there is a small public off street car park in front of the Village Hall on High Street.

10.27 Redbourn had a pleasant 'village' atmosphere which is greatly enhanced by the building fabric of the town centre. Shopping provision is limited to basic daily convenience needs and has a specialist comparison shopping role. Overall, the size of the centre makes it appropriate for District Centre designation, but its historic layout means there is very limited scope to expand its retail function.

Marshalswick

10.28 Marshalswick is a suburban centre located within the northern part of St Albans. The centre, which was purpose built some time ago, comprises three linked parades of shops – The Quadrant, Ridgeway and Wycombe Place.

10.29 The composition of the centre is as follows:-

Goods Outlets	Number of Units	Percentage Composition
Convenience	7	17.9%
Comparison	14	35.9%
Service	18	46.2%
Vacant	0	0.0%
Total	39	100.0%
<i>Source: GLH Floorspace Survey August 2005</i>		

10.30 Convenience goods shopping within Marshalswick is reasonable. In addition to the Budgens store (279m²/3,000 ft²) there has been a recent addition of a Sainsbury Local store attached to a petrol filling station on The Ridgeway. Bolstering these two supermarkets are two bakers, a health food store, an off licence and a CTN. The total convenience goods floorspace within Marshalswick is 745m² (8,030 ft²).

10.31 Comparison goods provision in Marshalswick is reasonable given the centre's function. There are 14 units with a total comparison goods sales are of 1,052 m² (11,332 ft²).

10.32 Comparison retailing is, with the exception of Hallmark Cards, operated by local independent traders. There is a diverse mix of comparison goods shopping, including furniture and furnishings, menswear, pet store and florists. The Marshalswick Furniture Company operate two relatively large comparison goods stores in the centre.

10.33 Service provision within Marshalswick is good, there are branches of both Lloyds and Barclays banks, a number of estate agents, hair salons and a dry cleaner. In proportional terms the 18 service units comprise 46.2% of the total number of units in Marshalswick.

10.34 There were no vacant units within Marshalswick when our survey was carried out in August 2005.

10.35 Marshalswick has good accessibility into St Albans by bus and the centre is well provided with surface level car parking located adjacent to The Quadrant. Additionally, there is a free public car park off Ridgeway which has dual shopper/visitor use with the community centre and Marshalswick library.

10.36 Overall, Marshalswick appears to be thriving. The centre has a reasonable range of shopping and service facilities and is popular with residents within the area. As a suburban centre within St Albans, it performs its District Centre function well.

Southdown

10.37 Southdown is a suburban centre lying within the southern part of the built up area of Harpenden.

10.38 The centre is focused upon the Southdown Road at its junction with Piggottshill Lane and Cravells Road. The centre's frontage is broken in places with residential properties and other non retail uses.

10.39 The composition of Southdown as at August 2005 was:-

Goods Outlets	Number of Units	Percentage Composition
Convenience	6	16.7%
Comparison	11	30.6%
Service	18	50.0%
Vacant	1	2.8%
Total	36	100.0%

Source: GLH Floorspace Survey August 2005

10.40 The largest convenience store in Southdown is Somerfield on Southdown Road with a sales area of 1,240m² (13,350 ft²). This store has little prominence within the centre, its frontage to Southdown Road is set back and the store is orientated toward the surface level customer car park to the rear. The store is reasonably well stocked and observations indicate that the store is used for both main food shopping and top up convenience shopping.

- 10.41 In addition to Somerfield, the remaining seven convenience stores have a sales area of 173m² (1,870 ft²), these stores are run predominantly by local independent traders and regional multiples.
- 10.42 The comparison goods shopping provision in Southdown is limited and specialist. The specialist provision includes a cycle store, fancy dress store, specialist electrical retailer and a car accessories store. The centre has no clothing/fashionwear or footwear retailers.
- 10.43 The overall quantum of comparison goods floorspace in Southdown is 439m² (4,730 ft²) and in unit numbers, comparison provision comprises 31% of the total units within the centre.
- 10.44 Service provision within Southdown is high at 50% of all units, the mix of services provided includes insurance brokers, hair salons, dry cleaners, public houses, restaurants, take away food establishments and estate agents.
- 10.45 There is one vacant unit in Southdown, providing a vacancy rate of 2.8%. In floorspace terms this is very small.
- 10.46 Accessibility to Southdown is good. There are a number of bus services linking the centre to the rest of Harpenden and beyond. Car parking is provided within two off street car parks, one a public pay and display facility controlled by the Council and the other operated as Somerfields customer car park which is actively policed by a parking management company on behalf of Somerfields. Additionally, there is some on street parking permitted within the centre.
- 10.47 Overall, Southdown is a busy district centre with a strong convenience shopping function by virtue of its Somerfields supermarket. Comparison shopping is limited and the centre has a range of A2 and A3 uses which bolster its function.

Wheathampstead

- 10.48 Wheathampstead is a village centre which lies to the north of St Albans and the east of Harpenden. The centre lies between the B651 and the B653.
- 10.49 Retailing within the centre is located upon High Street and Station Road which are linked together by Mill Walk. The centre includes a number of old and attractive buildings and St Helen's Church is a dominant feature within the village.
- 10.50 Our floorspace survey revealed the following composition:-

Table 10.5 Wheathampstead – Composition August 2005

Goods Outlets	Number of Units	Percentage Composition
Convenience	6	18.8%
Comparison	9	28.1%
Service	15	46.9%
Vacant	2	6.3%
Total	32	100.0%
<i>Source: GLH Floorspace Survey August 2005</i>		

- 10.51 Convenience goods provision is low in Wheathampstead, the main convenience goods store is the 'One Stop' convenience store which has a sales area of 93 m² (1,000 ft²). The remaining 148 m² (1,590ft²) of convenience goods floorspace (5 units) comprises traditional convenience goods businesses e.g. Bakers (x2), Butcher, Off-licence, CTN.
- 10.52 Comparison goods floorspace in Wheathampstead is 442m² (4,760 ft²) and this is a mix of predominantly specialist retailers, e.g Antiques, Train shop, Art Gallery and Contemporary Jeweller. The attraction to these stores will be wider than Wheathampstead's immediate local area catchment. There are a few other comparison goods retailers in Wheathampstead, including a chemists, florists, carpet shop and gift shop.
- 10.53 The service facilities within the town centre comprises approximately 47% of the total retail composition. These include public houses, restaurants, estate agents and a beauty salon.
- 10.54 There are two vacant units in Wheathampstead which gives a vacancy rate of 6.3%.
- 10.55 Wheathampstead is busy with through traffic. Accessibility to the town is reasonable by bus and there is a free surface level car park at Riverside on the eastern side of the High Street.
- 10.56 Overall, the centre has a pleasant village feel, however its retail provision is low in convenience terms, its primary function is as a local top up shopping location. Comparison shopping provision of a specialist nature comprising antique shops, and art/jewellery galleries.

Verulam

- 10.57 Verulam is a superstore based centre located within the south west of St Albans urban area.
- 10.58 The centre, when first developed, comprised a Waitrose supermarket of 1,350m² (14,520ft²) and 5 unit shops.

- 10.59 Currently, the Waitrose store is being extended to the front, rear and side and will incorporate all but one of the original 5 unit shops. The remaining unit shop will be occupied by a chemist and the Waitrose store will have an extended area of 1,897 m² (20,420 ft²).
- 10.60 Given that this Waitrose store is now a free standing store and it occupies an out of centre location, it is not considered appropriate to give it a formal retail designation within the Local Development Framework. To do so would give support to further expansion or redevelopment of this large food store without reference to due consideration of the need and sequential test as set out in PPS6.

Fleetville

- 10.61 Fleetville is a suburban centre located within the western part of St Albans. The centre is situated on Hatfield Road (A1057) and extends to approximately 1.1km, however not all of this is retail frontage, as the centre comprises a series of shopping parades interspersed with residential and other land uses.
- 10.62 Hatfield Road is a busy route into and out of St Albans city centre and is subject to heavy traffic flows and congestion at peak times.
- 10.63 The composition of Fleetville is as follows:-

Table 10.6 Fleetville – Composition August 2005		
Goods Outlet	Number of Units	Percentage Composition
Convenience	13	13.4%
Comparison	32	33.0%
Service	40	41.2%
Vacant	12	12.4%
Total	97	100.0%
<i>Source: GLH Floorspace Survey, August 2005</i>		

- 10.64 Whilst there are only 13 convenience goods outlets within Fleetville, there is 3,920m² (42,190ft²) of convenience goods floorspace in the Centre. The majority of this floorspace is contained within a Morrisons superstore which has a sales area of 3,391m² (36,500ft²). The Morrisons store is served by extensive surface level car parking and benefits from a 12 pump petrol filling station.
- 10.65 The other convenience goods retailers present within Fleetville are a mix of traditional convenience retailers and specialist Asian/Middle Eastern grocers.

- 10.66 Comparison goods retail provision within Fleetville has a total floorspace of 1,694m² (18,234ft²). The mix of comparison offer is biased toward specialist retailing, e.g pianos and musical instruments, hobby stores, saree shop, fishing tackle, car audio and glass and glazing outlets. The centre has no mainstream clothing or footwear stores.
- 10.67 Fleetville's service provision is good. There are a number of ethnic restaurants and takeaways, several hair salons, estate agents and public houses. There are no bank or building society outlets within Fleetville, however the Post Office provides a banking service and there are ATMs available at Morrisons.
- 10.68 There are 12 vacant properties within Fleetville. This is equivalent to 12% of the Centres composition. Included within this is a reasonable sized site which was formerly a tyre and exhaust depot. This site is set back from the road frontage and in its current configuration contributes nothing to the Centre. This is therefore a redevelopment opportunity, with a housing or mixed use scheme likely to be the most appropriate and financially viable prospect.
- 10.69 Fleetville is very accessible, a number of buses are routed along Hatfield Road and on street car parking proliferates. The only off street car parking of note serving the centre is the Morrisons car park.
- 10.70 Fleetville is the largest of the District Centres, although it is, in reality, a series of retailing parades focused upon a main arterial routes into the City. Apart from Morrisons store, which attracts mostly car borne shoppers, the centre has no distinct focus or core.
- 10.71 It is considered appropriate for Fleetville to be allocated as a District Centre, although some distinction should be made to reflect its specialist role, ethnic diversity and the interrupted retail frontage.

Summary

- 10.72 A review of the seven neighbourhood centres has been undertaken. The table below based upon total floorspace ranks the centres from the largest to the smallest.

Centre	Total Sales (m²)	Convenience Sales (m²)	Comparison Sales (m²)
Fleetville	5,631	3,919	1,693
Southdown	1,853	1,413	439
Marshalwick	1,799	746	1,053
Verulam	1,500	1,428	72
Redbourn	876	320	557
London Colney	873	622	251
Wheathampstead	682	240	442

Source: GLH Floorspace Surveys – Appendix 6

- 10.73 The review of neighbourhood centres shows that Fleetville, Southdown and Marshalwick are suburban centres within the urban areas of St Albans and Harpenden. Their primary functions are as convenience centres with other service (A2-A5) uses forming an important element of their composition. Comparison shopping uses are secondary to their main functioning. Overall within the local hierarchy Fleetville, Southdown and Marshalwick are considered to perform District Centre functions, in the wider Sub Regional context they are considered to be local centres. It should be acknowledged that Fleetville also has an ethnic and specialist comparison goods role.
- 10.74 Redbourn, London Colney and Wheathampstead centres are the traditional village centre foci of smaller settlements within St Albans City and District. They have less retail floorspace than the suburban centres and have a predominantly local convenience goods shopping function. Their designation within the local hierarchy is considered to be village/smaller district centre. In the sub regional context Redbourn, London Colney and Wheathampstead should be recognised as local/village centres.
- 10.75 Having reviewed Verulam centre, we consider it is best described as a free standing food store as it lacks the other shopping and service uses usually associated with District Centres. Verulam should not be given a formal designation within the Local Development Framework hierarchy of retailing centres.

11 CURRENT PATTERNS OF RETAIL SPENDING AND LEISURE VISITS

Introduction

- 11.1 Our assessment of current patterns of retail spending is based upon a comprehensive telephone survey of 1,014 households resident in the primary catchment area of St Albans District. The telephone survey took place between Thursday 28 July and Sunday 2 August 2005 by NEMS Market Research working to the code of practice and quality assurance of The Market Research Society. The household survey results are provided at **Appendix 7**. In the case of the comparison goods shopping patterns, the household survey results have been adjusted to remove the responses 'don't know', 'don't do' and 'varies/no set pattern'.
- 11.2 Attached at **Map 1** is a plan illustrating the catchment area and the individual survey zones. Broadly the zones comprise a St Albans Zone centred on St Albans, a Harpenden Zone centred on Harpenden, and northern, southern, eastern and western zones covering those areas of the district respectively.
- 11.3 The boundaries of each zone are based on a combination of various post code sectors to create zones which are intended to comprise a "best fit" catchment area for St Albans and Harpenden. In terms of the fringe areas, we have grouped together postcodes which encompass areas outside of the District, but which might actually look to centres and shops within the District for their shopping and leisure needs.
- 11.4 The survey sought to establish current patterns of leisure visits and shopping visits for the following:
- Main food and groceries
 - Secondary food and groceries
 - Clothing, footwear and fashion goods
 - Electrical audio visual equipment
 - Domestic appliances
 - Furnishings
 - DIY and decorative supplies
 - China, glass and hardware goods
 - Jewellery, chemist goods and cosmetics
 - Books, toys, sporting goods and recreation goods
- 11.5 The market shares for each zone are applied to the pot of expenditure available to the residents of each zone – which is calculated using data on population and per capita spending from MapInfo – in order to express the patterns of shopping in absolute money

terms, and so allow the turnover of each centre or store to be calculated. This is discussed in more detail in Section 13.

Main Food and Top-Up Shopping Patterns

- 11.6 Within Zone 1 (St Albans Core) the most popular food store destination is Sainsbury's Everard Close in St Albans (28.20%). This is clearly the most dominant food store within the St Albans core, albeit the Morrisons at Hatfield Road, Fleetville (16.50% and the Sainsbury's, London Colney (15.80%) were also popular.
- 11.7 In terms of top-up shopping patterns 11.30% of respondents utilised Sainsbury's Everard Close whilst 12% used Morrisons at Hatfield Road, Fleetville. The Tesco Metro Store at St Peter's Street, St Albans only attracted 6% of top-up shopping trips (which is only marginally better than its 3.50% trade retention for main food shopping trips).
- 11.8 In Zone 2 (Harpenden Core) unsurprisingly the most popular stores were the two major food stores within Harpenden Town Centre. The Waitrose at Leyton Road (28.70%) being marginally more popular than Sainsbury's High Street, Harpenden (24.90%). The Somerfield Store at Southdown Road, Harpenden was also a popular destination for major food shopping (16.30%). However, notably some 19.30% of respondents undertook their main food shopping outside of the district.
- 11.9 Top-up shopping patterns very much mirrored the main food spending patterns with Waitrose, Leyton Road (20.40%), Sainsbury's, High Street (15.50% and Somerfields, Southdown Road (16.20%) all proving popular. In addition, the Tesco Express at Lower Luton Road, Harpenden was also popular with 6.30%. Surprisingly, the Marks & Spencers store at Church Green Parade in Harpenden town centre only attracted 2.8% of respondents.
- 11.10 Zone 3 (Northern Fringe) is very much dominated by stores outside of the catchment area. Some 83.10% of the residents of the Northern Fringe Zone undertake their main food shopping trips outside of the catchment area. The single most popular store was the ASDA store at Wigmore Hall Centre at Luton (22.30%). In terms of top-up shopping, some 84.80% of respondents undertook their top-up shopping activities outside of the zone. Within the Northern zone, only the Sainsbury's High Street, Harpenden (5.10%) and the Tesco Express at Lower Luton Road, Harpenden (5.10%) were popular top-up shopping destination within the District.
- 11.11 Zone 4 (Eastern Fringe) was also dominated by stores outside of the catchment area. Notably Tesco Oldings Corner, Hatfield (29.90%), ASDA, Town Centre, Hatfield (14.90%),

Waitrose, Bridge Road, Welwyn Garden City (14.90%), Sainsbury's, Church Road, Welwyn Garden City (10.30%) and Tesco, Muttons Lane, Potters Bar (8.00%). In terms of top-up shopping some 3.4% utilised Marks & Spencers St Peter's Street, St Albans with no other stores within the catchment area achieving any more than 1.70%. Again the majority of respondents (88.20%) undertook their top-up shopping outside of the catchment area.

11.12 Only 13.10% of resident's main food spending within Zone 5 (Southern Fringe) actually occurred within the St Albans and Harpenden catchment areas. The majority of spending in this zone is either undertaken at the ASDA store at Oldhams Trading Estate Watford (14.20%), Sainsbury's, North Western Avenue, Watford (16.30%) or the Tesco Store at Borehamwood (13%).

11.13 Similarly very few respondents of the Southern Fringe undertook their top up shopping within the catchment area of the District with the majority of top-up spending (90.30%) being undertaken out of the catchment area.

11.14 Finally with regard to Zone 6 (Western Fringe) only 6.50% of main food spend for resident's within the western fringe was actually spent within the catchment area of St Albans and Harpenden. The single most dominant store for residents in the Western Fringe was the Tesco store at Jarman Way, Hemel Hempstead which attracted some 34.60% of available spending.

11.15 A review of top-up shopping patterns of residents of the Western Fringe confirm that 87.20% of top-up shopping trips are undertaken at stores outside the designated catchment area. The 12.80% of top-up shopping undertaken with the catchment area was widely dispersed with no one store/centre being dominant.

Clothing and Footwear

11.16 Overall, St Albans City Centre was the most popular location for respondents to undertake clothing and footwear shopping, with almost one-third of all respondents indicating this location. The next most popular centres were located outside of the District namely Watford (17.8%), Welwyn Garden City (10.3%) and Luton (8.9%).

11.17 Within the St Albans District itself, the majority of respondents were accessing clothing and footwear needs from the St Albans City Centre (55%). The next most popular location for clothing and footwear shopping was London Colney Retail Park (5.6%).

11.18 In the Harpenden Core (Zone 2), some 27.7% of clothing and footwear shopping was undertaken in St Albans, and only 7.4% in Harpenden itself. Almost 54% was undertaken in

the centres located outside of the District including Welwyn Garden City, Watford, Luton and London.

- 11.19 In the Fringe areas, less than 15% of just shopping trips were undertaken in St Albans, with the majority being overwhelmingly undertaken in centres immediately outside the District, including Luton (Northern Fringe – 58.4%), Welwyn Garden City (Eastern Fringe – 48.8%), Watford (Southern Fringe – 65.9%) and Hemel Hempstead (Western Fringe – 45.5%). None of the respondents in the Fringe utilised Harpenden Town Centre for such trips.

Electrical Audio/Visual

- 11.20 For the St Albans Core, the centres within the St Albans District were an important source of electrical audio/visual goods. More than 53% of respondent's access facilities in St Albans City Centre (33.7%), St Albans Retail Park, Griffiths Way (11.7%) and Alban Park, Hatfield Road (6.9%). Other important centres, located outside the District, include Watford and Welwyn Garden City, although 11.4% of respondents were shopping for these goods via mail order/ catalogue/internet.
- 11.21 In the Harpenden Core, the most important centre for respondents was Welwyn Garden City (33.1%), followed by Luton (13.5%) and mail order/catalogue/internet (13.5%). Only 20% of electrical goods were purchased from centres within the St Albans District.
- 11.22 Within the Fringe Areas, a similar pattern was reflected in the electrical goods shopping patterns to that shown by clothing and footwear patterns. Luton, Welwyn Garden City, Watford and Hemel Hempstead were the most important centres for respondents in the Northern, Eastern, Southern and Western Fringes (respectively) for accessing electrical audio/visual goods.

Domestic Appliances (White Goods)

- 11.23 In the St Albans Core, St Albans City Centre was again the most popular location to access domestic goods (27%), followed by St Albans Retail Park (14.6%). Respondents within this zone also regularly used Watford Town Centre (11.6%) and Welwyn Garden City (12.2%) to access these needs. Mail order/catalogue/internet was also a popular way to purchase white goods (10.3%).
- 11.24 In the Harpenden Core, centres outside the District were the favoured locations to access domestic goods, particularly Welwyn Garden City (40.6%). In terms of locations within the District, St Albans City Centre and St Albans Retail Park were equally used for domestic appliances (7.1%).

11.25 Within the Fringe Areas, a very limited number of respondents utilised the centres within the District for domestic appliances. The majority used the popular centres already identified for purchasing these goods, demonstrating a clear pattern of shopping trends.

11.26 Retail parks were more favoured for this type of shopping. Luton Retail Park was regularly used by respondents in the Northern Fringe (13.9%), Watford Arches Retail Park was popular in the Southern Fringe (18.3%) and Aspley Mill Retail Park was accessed by almost one-quarter of respondents in the Western Fringe. Hatfield Town Centre also emerged in an important location for Eastern Fringe Residents.

Furnishings and Textiles

11.27 Whilst almost one-third of furnishing and textile purchases within the St Albans Core were undertaken in St Albans City Centre, the remaining (majority of purchases) were distributed between centres located immediately outside of the District, including Welwyn Garden City (16.9%), Watford (19.80%), Hemel Hempstead (3.20%) and London (2.60%).

11.28 In the Harpenden Core, Welwyn Garden City was by far the most important centre for furnishings and textiles, with 37% of respondents using this centre for this purpose. Around one-quarter of respondents used St Albans and Harpenden centres.

11.29 The Northern Fringe residents favoured Luton followed by Welwyn Garden City for furnishings and textile purchases, while Eastern Fringe residents were shopping at Welwyn Garden City primarily (51.50%) and Stevenage (13.60%) to a lesser extent. In the Southern Fringe, the response was overwhelmingly Watford Town Centre (65.10%). However, for Western Fringe residents, purchases were more equally split between Watford (26.80%) and Hemel Hempstead (33.80%).

11.30 Mail order/catalogue/internet shopping played a smaller role when it came to furnishings and textile shopping.

DIY and Decorator's Supplies

11.31 St Albans City Centre and retail parks accounted for 83% of DIY shopping needs within the St Albans Core and some 45% of DIY needs for the catchment area as a whole.

11.32 Within the Harpenden Core, respondents were more likely to access these needs within Harpenden Town Centre (11.2%) than St Albans (7.70%), but however favoured Luton as a DIY shopping destination, including Luton Town Centre (16.0%) and Luton Retail Park (30.8%).

11.33 The Northern Fringe respondents generally accessed Luton destinations for DIY and decorator goods (72%) while Eastern Fringe respondents utilised shopping facilities at Welwyn Garden City (Town Centre and Retail Park) and Hatfield.

11.34 Two thirds of Southern Fringe respondents accessed DIY facilities at Watford whilst Western Fringe residents favoured Hemel Hempstead facilities (76.8%), including the town centre, B&Q superstore and Aspley Mill Retail Park.

China, Glass and Hardware

11.35 Some 30% of total spending on china, glass and hardware goods was undertaken in St Albans District, with the majority coming from the St Albans Core.

11.36 For the Harpenden Core and Fringe Areas, centres located immediately outside St Albans District accounted for at least two-thirds (66%) of china, glass and hardware shopping (increasing up to 86% in the Eastern Fringe). In the Harpenden Core, respondents shopped most frequently within Welwyn Garden City Town Centre (45.10%), which was also a popular location for Eastern Fringe residents. Northern Fringe residents again favoured Luton Town Centre (51.5%). Almost three-quarters of Southern Fringe residents shopped at Watford (73.90%) whilst Western Fringe residents were split between Watford (34.70%) and Hemel Hempstead (36.00%).

11.37 With the exception of the St Albans Core, other centres located further afield accounted for at least 8% of china, glass and hardware shopping, rising to 18% for Northern Fringe residents. Shopping facilities in Milton Keynes were of particular note in this category.

Jewellery, Chemist Goods and Cosmetics

11.39 When shopping for jewellery, chemist goods and cosmetics, respondents in the St Albans and Harpenden Cores showed a greater propensity to shop locally, with almost 80% of respondents in the St Albans Core and 60% within the Harpenden Core shopping within St Albans District.

11.40 Respondents in the Fringe Areas generally favoured the same centres established in the above shopping patterns for other goods, including Luton (Northern Fringe), Welwyn Garden City (Eastern Fringe), Watford (Southern Fringe) and Hemel Hempstead (Western Fringe). Clearly these centres are the preferred centres for everyday shopping as well as comparison goods shopping for respondents within these Cores.

11.41 With the exception of the Northern Fringe, the impact of mail order/catalogue/internet shopping for these goods was negligible.

Books, Toys, Sports and Recreational Goods

11.42 The shopping pattern for books, toys, sports and recreational goods again suggests a great propensity to shop locally for these goods. In the St Albans Core, more than 70% shop within the St Albans District, and in Harpenden, more than 50% shop within the District.

11.43 Fringe respondents reinforced the shopping patterns established above.

11.44 However, in this case, mail order/catalogue/internet shopping was important in all but the Eastern Fringe, accounting for an average of 10% of total respondents' purchases in this category.

Leisure Patterns

11.45 The household telephone survey questioned householders about their leisure habits, where they went to participate in various leisure activities and the frequency of their participation.

11.46 In relation to cinema going, respondents were most likely to go to Hatfield (37%), Watford (17%), Hemel Hempstead (11%) and Luton (10%). From the St Albans and Harpenden core zones Hatfield was the most popular choice by some margin.

11.47 Central London was the most popular location for theatre and concert going (67%). St Albans was the next most popular destination attracting 17% of visits from the Study Area.

11.48 A low proportion of households within the survey went to play Bingo. The most popular location for Bingo goes from the Study Area was Borehamwood (26%) and Luton (19%).

11.49 Watford town centre was the most popular destination for ten pin bowling (30%) followed by Hemel Hempstead (22%) and Stevenage (16%).

11.50 For restaurant going, St Albans and Harpenden were the main locations chosen (36% and 13% respectively) across the Study Area. On a zone by zone basis St Albans was a reasonably popular choice across all zones but generally centres local to each zone were most popular.

11.51 A low proportion of households went to nightclubs/discos (15%), those households which did visit nightclubs/discos chose St Albans, Watford and Central London.

- 11.52 Health club/gym visits from the Study Area were in the majority to St Albans, with Watford the location which dominated choices to the south of the Study Area and Hatfield dominated the eastern fringe.
- 11.53 Pub and wine bar visits were generally undertaken to centres local to each of the study zones. St Albans was the most popular venue across the whole Study Area (38%) and Harpenden was the second most popular destination (16%).

12 THE NEED FOR RETAIL FLOORSPACE IN ST ALBANS DISTRICT 2006-2016

Introduction

- 12.1 In this section we consider the quantitative need for additional floorspace within the St Albans City and District Council area.
- 12.2 The detailed retail capacity calculations are provided within **Appendix 7** and the results of the analysis are explained and summarised below.
- 12.3 The quantitative retail need work has considered the following matters:
- Consumer retail expenditure per head and the total available retail expenditure within the retail study area.
 - Analysis of the expenditure shares claimed by centres and facilities within the District (and outside the District) based upon the household survey shopping patterns (2005) which are forecast forward to 2006, 2011, 2016.
 - An estimate of the growth in expenditure up to 2016 within the study area and the quantum of that expenditure which is claimed by centres and facilities within the District.
 - A comparison between the expenditure claimed by centres and facilities within the District and the estimated 'benchmark' turnover of these facilities.
 - Retail capacity is expressed as both expenditure surplus and floorspace requirements for additional convenience and comparison goods shopping.
- 12.4 The retail floorspace capacity forecasts within the study are provided on the basis of information and evidence available to us. The data adopted and assumptions made do, we consider, provide a robust basis for the preparation of medium/long term forecasting up to 2016. Whilst the Development Plan Documents which the Council is currently preparing have an end date of 2021, it is not however considered appropriate for the quantitative retail floorspace need estimates to be calculated up to this end date. Notwithstanding this however, we consider that the calculations should be revised periodically over the Plan/Local Development Framework period, as and when new base data becomes available, updated surveys of shopping patterns are commissioned and new developments are completed.

Methodology and Data Inputs

- 12.5 In preparing this quantitative need assessment for St Albans City and District Council's administrative area we have adopted a Study Area which extends beyond the District, thus

taking account of the fact that shoppers do not observe administrative boundaries when they shop. The Study Area is based upon postcode sectors and has been divided into six zones.

Table 12.1 Study Area Zones	
St Albans Core	AL1_1, AL1_2, AL1_3, AL1_4, AL1_5, AL2_1, AL2_2, AL2_3, AL3_4, AL3_5, AL3_6, AL4_0, AL4_9
Harpenden Centre	AL5_1, AL5_2, AL5_3, AL5_4, AL5_5, AL3_7, AL4_8
Northern Fringe	LU1_4, LU1_3, LU2_9, SG4_8
Eastern Fringe	AL10_9, AL8_7, AL6_9, AL9_7
Southern Fringe	WD7_7, WD7_8, WD7_9, WD25_0, WD25_8, WD25_9
Western Fringe	WD5_0, HP3_8, HP2_4, HP2_7, HP2_6, AL3_8

- 12.6 The Study Area and Zones are shown on **Map 1**, this map also shows the District boundary and locations of the District's town and neighbourhood shopping centres.
- 12.7 The population of the Study Zones and Study Area in 2001 is set out in Table 1, **Appendix 8** along with Mapinfo's forecasts of population for 2006, 2011 and 2016. Mapinfo's population forecasts are based upon subnational population projections at local authority district level from Office for National Statistics (ONS). The projections are based on demographics rather than on planning information. In other words they take account of the age structure of the population, expected birth and death rates, and trends in migration. But they do not, for example, incorporate information from the planning system on where new housing developments are likely to take place, which can have significant effects on population at a local level.
- 12.8 The ONS demographic based population estimates are commonly used for retail capacity assessments of this nature. There is some merit in using housing based forecasts, however at present there are no up to date forecasts available as work on the Regional Plan and specifically strategic housing figures for the Districts have not yet been completed. When housing based forecasts of population for the Districts becomes available the Council may wish to revisit the retail (and leisure) capacity calculations.
- 12.9 Consumer spending data has also been obtained from MapInfo. There are two alternative expenditure bases, goods based and business based expenditure. Both have their merits in forecasting retail capacity and impact. Adopting a business based approach considers spending within the retail businesses/stores, whilst the goods based approach considers consumer spending on separate goods categories. MapInfo, who have traditionally prepared the expenditure estimates consider that neither goods nor business based expenditure analysis can be authoritatively pronounced better (URPI Information Brief 95/1).

- 12.10 However, Ministerial statements relating to the now superseded PPG6 and the publication of PPS6 provide clear guidance that the Government considers the class of goods and goods based approach is preferred. Accordingly, our retail capacity calculations are undertaken on a goods basis.
- 12.11 The consumer expenditure per head within the Study Area on convenience goods and comparison goods is provided in Tables 2 and 12 at **Appendix 8** respectively. The consumer expenditure per head data is for 2001 in a 2001 price base. Adjustments are made to the 2001 consumer expenditure per head to deduct the proportion of consumer spending which does not take place in retail stores such as mail order shopping, doorstep sales, e-commerce and factory direct sales. The adjustments for these 'special forms of trading' (SFT) are informed by MapInfo within Table 2 of the Explanatory Volume 2001 Expenditure (2004) (see relevant extract **Appendix 9**).
- 12.12 The adjusted 2001 expenditure (ie excluding SFT) is then increased in line with trend based projections provided by Mapinfo within Information Brief 05/2 (see **Appendix 1**).
- 12.13 MapInfo advise within Information Brief 05/2 that:
- “convenience goods retail expenditure has been erratic over the last 40 years, with low trend growth over the period as a whole”.*
- 12.14 MapInfo advise that the most statistically robust estimate of trend growth is over the period 1993 to 2004 when annual growth averaged 0.8%. Accordingly, we adopt an expenditure growth rate for convenience goods of 0.8% per annum.
- 12.15 Comparison goods expenditure trends are reported to be satisfactorily robust for all periods, with projected sales per capita on medium and long term trends most believable. Therefore, we have adopted an expenditure growth rate for comparison goods of 5.2% per annum which lies between the long term trend of 4.8% and the medium term trend of 5.5%.
- 12.16 The product of Study Area population and expenditure per head provides an estimate of total consumer expenditure within the Study Area. The available expenditure for 2001, 2006, 2011 and 2016 is calculated within Table 3 (convenience goods) and Table 13 A to H (comparison goods).
- 12.17 The capacity work is underwritten by the results of a household telephone interview survey conducted in July 2005 by NEMS Market Research. The survey established inter-alia, the locations which residents within the Study Area visited to undertake shopping for various broad categories of goods. These categories are:

- Main food shopping
 - To-up (day to day) convenience shopping
 - Clothing and footwear
 - Electrical audio visual
 - Large domestic appliances (white goods)
 - Furnishings
 - DIY and Decorator supplies
 - China glass and hardware
 - Jewellery, chemist and cosmetic goods
 - Books, toys, sporting and recreational goods
- 12.18 The full results of the household survey are reproduced as **Appendix 7** and details of shopping patterns are described in the preceding section (Section 11).
- 12.19 Table 4, **Appendix 8** sets out the main food shopping patterns informed by the household survey indicating percentage market share of each individual store/centre/location drawn from the Study Area. Table 6, **Appendix 8** provides the percentage market share patterns for top-up food shopping.
- 12.20 Tables 12, A to H **Appendix 8** provides the comparison goods market shares of the centres/locations informed by the shopping patterns revealed in the household survey. Responses 'varies', 'don't know' and 'don't buy' have subsequently been removed by NEMS and the results rebased as such responses do not enable expenditure to be allocated to centres or locations.
- 12.21 Having established the convenience and comparison market shares of each of the retail locations, the available expenditure within the Study Area for each of the study years is distributed to centres/facilities on the basis of these market shares. This provides the implied turnover of these centres/locations. These shares are based upon the 2005 shopping patterns exhibited in the household telephone survey and are applied to the subsequent study years without making any adjustment to take account of future change to any of the existing stores/centres/locations attraction and consequent expenditure share. As centres improve and expand or decline and stores change, their attraction will change. Therefore these fixed shopping patterns (based on 2005) will require review in later years and a new household survey should be commissioned when updating this study.
- 12.22 The expenditure attracted to each centre/location is provided within Tables 5 and 7 for convenience shopping and Table 15 comparison shopping. A summary of the turnover of facilities with the District is provided within Table 8 (implied convenience goods turnovers) and Table 16 (implied comparison goods turnovers).

- 12.23 Capacity/need for additional convenience and comparison floorspace is reviewed within Table 10 (convenience capacity) and Table 18 (comparison capacity). These tables compare the implied turnovers of facilities with the 'benchmark' turnovers of the same. The benchmark turnovers are based upon published sales density figures for national multiple retailers with some adjustments to reflect sales mix and local independent traders within the centres. The adjustments also have regard to the results of the business occupier survey in particular comments made regarding trading performance within St Albans and Harpenden.
- 12.24 The surplus of expenditure points to a need for additional floorspace whilst a deficit of consumer expenditure (ie implied turnover is below benchmark turnover) suggests that either existing facilities are performing poorly or that there is too much retail floorspace, in either circumstances no additional floorspace is needed.

Convenience Goods Capacity

- 12.25 Consumer expenditure per head on convenience goods within the Study Area in 2001 varied between £1,717 per head (St Albans Zone) and £1,576 per head (Eastern Zone), the overall Study Area expenditure per head averaged £1,662 (Table 2, **Appendix 8**). The local Study Area expenditure level for convenience goods is above the Great Britain average (£1,580 per head) by 5.2%.
- 12.26 The 2001 convenience goods expenditure per head is adjusted to reflect the element of convenience goods spending which is transacted through non retail facilities (special forms of trading – SFT) such as mail order and e-commerce. The convenience goods expenditure is deflated by 1.5% to take account of SFT. This revises downward the 2001 expenditure per head values for the Study Area Zones.
- 12.27 The growth in convenience expenditure per head is projected to be +0.8% per annum (Mapinfo Information Brief 05/02). The resultant expenditure per head values for the Study Area Zones are set out in Table 2 **Appendix 8** for example the St Albans Zone's expenditure per head is:

2001 excluding SFT	£1,691
2006	£1,760
2011	£1,832
2016	£1,906

Source: GLH Retail Capacity Table 2, Appendix 8

12.28 The household survey questioned where main food and top-up shopping was being undertaken to reflect the differing facilities used for larger food shopping trips and more local daily needs shopping. The split between main food shopping and top-up shopping has been assumed as 75% main, 25% top-up. These percentages have been applied to the total convenience expenditure per head to derive consumers annual spending per head on main food shopping and top-up shopping. The resultant spending per head is set out in Table 2, **Appendix 8** For example the expenditure per head in the St Albans Zone for main and top-up is:-

Table 12.3 St Albans Zone Convenience Expenditure Per Head (Main Food & Top Up)				
	2001 Exc SFT	2006	2011	2016
Main	£1,268	£1,320	£1,374	£1,429
Top-Up	£423	£440	£458	£476

Source: GLH Retail Capacity Table 2, Appendix 8

12.29 Table 3, **Appendix 8** provides the estimated convenience goods expenditure available within the Study Zones for all convenience shopping main food shopping and top-up shopping. These estimates are the product of population (Table 1), **Appendix 8** and Expenditure per head (Table 2, **Appendix 8**).

12.30 The study area exhibits the following convenience goods expenditure potential.

Table 12.4 Convenience Goods Expenditure Potential (Generated)				
	2001 Exc SFT	2006	2011	2016
Main	£329.49m	£353.42m	£376.39m	£401.30m
Top-Up	£109.83m	£117.81m	£125.46m	£133.77m
Total	£439.32m	£471.22m	£501.85m	£535.07m

Source: GLH Retail Capacity Table 3, Appendix 8

12.31 The combination of population growth and growth in convenience goods expenditure per head provides a reasonable level of convenience goods expenditure growth over the study period thus:

Table 12.5 Convenience Goods Expenditure Growth to 2016				
	2001 - 2006	2006 - 2011	2011 - 2016	2001 - 2016
Main	£23.93m	£22.97m	£24.91m	£71.81m
Top-Up	£7.98m	£7.65m	£8.31m	£23.94m
Total	£31.90m	£30.63m	£33.22m	£95.75m

Source: GLH Retail Capacity Table 3, Appendix 8

- 12.32 The market shares of convenience stores and facilities are provided within Tables 4 and 6, **Appendix 8** for main food shopping and top-up convenience shopping respectively. These market shares have been directly informed by the results of the household survey.
- 12.33 Sainsbury at Everard Close in St Albans is the most popular main food shopping destination within the Study Area.
- 12.34 Sainsbury at London Colney is the next most popular followed by Morrisons at Fleetville, St Albans and Waitrose and Sainsbury in Harpenden. Outside the District, Tesco at Hatfield (Oldings Corner) is a popular main food shopping destination, as is Asda at Watford. Overall St Albans City and District's convenience goods stores retain 53.8% of main food shopping trips from households within the Study Area.
- 12.35 In terms of top-up convenience goods shopping, this tends to be undertaken on a more local basis and no single store or location is overly dominant. Morrisons Fleetville, Sainsbury St Albans, Marks & Spencer St Albans, and Waitrose Harpenden are all popular stores, as too are local stores in St Albans. Top-up food shopping retention by the District's facilities from the Study Area is 58.4%.
- 12.36 The market shares of stores and locations within Tables 4 and 6, **Appendix 8** are then used to model convenience goods expenditure flows to stores and centres both within and beyond the Study Area. These results are provided within Tables 5 and 7, **Appendix 8** for main food and top-up shopping respectively. As already stated these shopping patterns and consequent expenditure shares are fixed at the date of the household survey (2005) and as the relative attractions of retail facilities both within and outside the study area change these market shares will change. Therefore it will be necessary to conduct further household surveys when this study is updated.
- 12.37 Tables 5 and 7 consider both stores and locations with the Study Area and beyond.
- 12.38 Table 8, **Appendix 8** combines the main food and top-up implied turnover information from Tables 5 and 7 to provide estimates of implied turnover of the stores/facilities within the District in 2006, 2011 and 2016. The implied turnover of selected stores within St Albans City and District is provided below:-

Table 12.6 Implied Convenience Goods Turnover			
Store	Year		
	2006	2011	2016
Sainsbury, St Albans	£43.89m	£46.47m	£49.32m
Tesco, Metro, St Albans	£8.22m	£8.71m	£9.24m
Marks & Spencer, St Albans	£7.64m	£8.08m	£8.58m
Morrisons, Fleetville	£25.78m	£27.28m	£28.93m
Waitrose, Harpenden	£21.35m	£22.63m	£24.04m
Sainsbury, Harpenden	£18.40m	£19.50m	£20.72m
Sainsbury, London Colney Park	£30.08m	£31.89m	£33.87m

Source: GLH Retail Capacity Tables 5, 7 and 8, Appendix 8

- 12.39 The benchmark turnovers of the convenience stores/facilities within the District have been calculated within Table 9, **Appendix 8**. The calculation comprises the sales area of the store/facilities subject to an allowance for comparison goods sales within larger stores multiplied by the estimated benchmark convenience goods trading density. The resultant convenience goods benchmark turnover is the estimate of convenience goods trading turnover on the assumption that the store trades at company average level (ie there is no over or under trading). In dealing with other convenience goods stores i.e. the smaller stores, the sales floorspace has been estimated as part of our centre floorspace surveys and the total smaller stores floorspace has been multiplied by a sales density of £4,500/sqm in St Albans, Harpenden and the suburban neighbourhood centres and £4,000/sqm in the village centres (Redbourn, Wheathampstead and London Colney).
- 12.40 In the case of Waitrose at the Verulam Estate, the store extension has been included. All other large foodstores are as existing.
- 12.41 The benchmark turnovers are for calculated for 2004 in 2001 price base. The latest year of published trading density information provided within Retail Ranking (2005) is for the trading year to 2004.
- 12.42 The total benchmark convenience goods turnovers for the main centres in the District is provided within the table below, an allowance for improved trading efficiency of 0.5% per annum has been used to calculate the benchmark turnovers in 2006, 2011 and 2016.

Table 12.7 Convenience Goods Floorspace Benchmark Turnover Year (£m)				
Centre	2004	2006	2011	2016
St Albans	£91.50m	£94.46m	£94.79m	£97.19m
Harpenden	£34.74m	£35.08m	£35.97m	£36.88m
Rebourn	£1.28m	£1.29m	£1.32m	£1.36m
London Colney	£2.64m	£2.67m	£2.73m	£2.80m
Wheathampstead	£0.96m	£0.97m	£1.00m	£1.02m
London Colney Retail Park	£54.95m	£55.50m	£56.90m	£58.34m
District Total	£186.97m	£187.92m	£192.72m	£197.59m

Retail Capacity Tables, Table 9, Appendix 8 Allowance for improved floorspace efficiency of 0.5%pa

- 12.43 Having established the implied convenience turnover of stores and centres based upon market shares from the household survey results (Table 8) and the benchmark convenience goods turnovers of stores and centres (Table 9), it is now a case of comparing the two to consider the trading capacity for the study area and the need for additional convenience floorspace.
- 12.44 Table 10, **Appendix 8** provides the capacity analysis, comparing benchmark turnovers with implied market share turnovers.
- 12.45 For St Albans, the results show that the Sainsbury store at Everard Close is significantly over trading. Tesco Metro, M & S Food and Morrisons are also overtrading but not to the same extent as Sainsbury. The Waitrose store at Verulam is shown to be undertrading although this is due to store extension which has been taken into account in the benchmark turnover whereas the survey results related to the unextended store and was therefore less attractive to shoppers. The extended Waitrose will have an increased attraction to residents within St Albans and is likely to take some trade from Sainsbury and the other large stores.
- 12.46 The overall attraction of St Albans convenience goods provision is greater than our estimates for the benchmark turnover of the existing facilities (they are overtrading) this gives rise to a surplus convenience goods expenditure (turnover potential) and a theoretical requirement for additional convenience goods floorspace. The convenience goods expenditure capacity for St Albans is set out below:

Table 12.8 St Albans Convenience Goods Capacity		
Year	Expenditure Surplus	Floorspace Requirement
2006	£26.93m	2,449 sqm
2011	£31.64m	2,805 sqm
2016	£36.99m	3,199 sqm
<i>Source: GLH Retail Capacity Tables, Table 10, Appendix 8</i> <i>Notes: Assumes new convenience goods sales floorspace (superstore) will have a trading density of £11,000/sqm in 2006.</i>		

12.47 The quantitative convenience floorspace need for St Albans City is sufficient to support a large food superstore. Such a store would sell a mix of food and non food goods usually at a rate of around 65% food: 35% non food thus a store of circa 4,000 sqm sales area could be justified by 2011.

12.48 In Harpenden the capacity results show that Waitrose and Sainsbury are both significantly overtrading, as too is the Somerfield store in Southdown.

12.49 In overall terms, the implied convenience goods turnover of Harpenden exceeds the estimated benchmark turnover of the facilities. The summary table below show the capacity position and the floorspace requirements which the excess expenditure could support.

Table 12.9 Harpenden Convenience Goods Capacity		
Year	Expenditure Surplus	Floorspace Requirement
2006	£24.82m	2,257 sqm
2011	£27.55m	2,443 sqm
2016	£30.66m	2,651 sqm
<i>Source: GLH Retail Capacity Tables, Table 10, Appendix 8</i> <i>Notes: Assumes new convenience goods floorspace (superstore) will have a trading density of £11,000/sqm in 2006</i>		

12.50 The convenience capacity calculation gives support for an additional foodstore to serve Harpenden's residents, although this need may be more appropriately met by extensions to the existing modestly sized foodstores within the town centre.

12.51 The capacity calculations show that food shopping provision at Colney Fields Retail Park (Sainsbury and M & S) are undertrading. However, this facility is located toward the edge of the Study Area and it is anticipated that at least 30% of its turnover is drawn from outside the Study Area and will not therefore have been recorded within the household survey

results. Visual inspections of both Sainsbury and M & S Food Hall do not suggest that either facility is undertrading by any significant amount.

- 12.52 Convenience goods capacity calculations for the villages of Redbourn, London Colney and Wheathampstead do not give rise to a convenience goods floorspace need for any of the centres. These centres have local convenience functions, relying primarily upon top-up and daily needs shopping trips. These centres are anticipated to continue to perform this role and can do so without any need for additional convenience floorspace.

Comparison Goods Capacity

- 12.53 The comparison goods capacity analysis is undertaken utilising the same study zones and area and population forecasts as the convenience goods capacity calculations (Table 1, **Appendix 8**).

- 12.54 The household survey questioned householders upon where they shopped for the following categories of comparison goods:-

Clothing and Footwear

Audio Visual Equipment

Large domestic appliances (white goods)

Furnishings

DIY and decorator supplies

China glass and hardware

Jewellery chemist and cosmetic products

Books, toys, sporting and recreation goods

- 12.55 The goods categories used for the household survey are broadly consistent with the comparison goods categories for consumer expenditure estimates provided by MapInfo. The market shares of centres and facilities implied by the household survey have been applied to available expenditure to build up the implied turnovers of centres within St Albans City and District and competing centres.

- 12.56 Tables 12A to H set out the comparison goods expenditure per head figures for each of the component categories of expenditure (as questioned in the household survey).

- 12.57 As with the convenience capacity calculations, a deduction has been made to the 2001 based expenditure to reflect non-store spending e.g. mail order, factory direct sales and ecommerce. The deduction for SFT is informed by Mapinfo's Expenditure Explanatory Volume 2001 edition, Table 2 – see **Appendix 9** The overall deduction for SFT and

comparison goods is 7.0%, with SFT percentages varying significantly between comparison goods categories e.g. DIY and decorator goods 1.3% SFT, textiles and soft furnishings 14.5% SFT.

- 12.59 Having made allowances for SFT by comparison goods categories, the comparison goods expenditure per head is projected forward taking an annual growth rate of +5.2% per annum. The resulting expenditure per head values for 2006, 2011 and 2016 by comparison goods categories is set out in Tables 12A to H, **Appendix 8**
- 12.60 Tables 13A to H, **Appendix 8** provides the estimated comparison good expenditure generated within the Study Area over the study period. The results are provided in the Tables for each of the comparison goods categories considered. The comparison goods expenditure generated is the product of population (Table 1, **Appendix 8**) with expenditure per head (Table 12, **Appendix 8**).
- 12.61 There is considerable growth in available comparison goods expenditure over the study period, between 2006 and 2016.

Table 12.10 Comparison Goods Expenditure Generated			
Goods Category	Year (£m)		
	2006	2011	2016
Clothing and Footwear	£185.69m	£244.91m	£323.36
Audio Visual/Electrical	£148.88m	£196.28m	£259.08m
Domestic Appliances	£29.75m	£39.23m	£51.77m
Furnishings	£107.79m	£142.10m	£187.56m
DIY and Decorations	£38.47m	£50.73m	£66.96m
China Glass and Hardware	£54.18m	£71.43m	£94.28m
Jewellery/Chemist/Cosmetics	£146.28m	£192.82m	£254.49m
Books/Toys/Sports/Recreation	£210.55m	£277.60m	£366.41m
Total Comparison Expenditure	£921.60m	£1,215.10m	£1,603.92m
Source: GLH Retail Capacity Tables, Table 13, Appendix 8			

- 12.62 As with the convenience capacity analysis, the household survey has been used to model the implied turnover of the District's main centres and facilities based upon their market shares from the Study Area. Tables 14A to H, **Appendix 8** provides the comparison shopping market share pattern for 2005, this market share pattern has been held constant and applied to available expenditure for each of the study years to establish each centres implied turnover. Tables 15.1A to H (2006), 15.2A to H (2011) and 15.3A to H (2016), **Appendix 8** build up the implied comparison goods turnovers of the District's centres and comparison shopping facilities.

12.63 The comparison goods expenditure trade retention by St Albans and Harpenden which are the primary comparison goods shopping locations within the District is set out in Tables 14A to H and briefly summarised below:-

Table 12.11 Comparison Goods Trade Retention From Study Area			
Goods Category	St Albans	Harpenden	City & District
Clothing and Footwear	32.38%	1.60%	39.10%
Audio Visual/Electrical	17.01%	1.22%	28.15%
Domestic Appliances	13.65%	1.02%	26.78%
Furnishings	17.89%	2.58%	25.89%
DIY/Decoration	20.91%	2.22%	44.51%
Clinic/Glass/Hardware	23.49%	2.11%	29.55%
Jewellery/Chemist/Cosmetics	35.97%	9.52%	48.62%
Books/Toys/Sports/Recreation	29.50%	6.86%	42.58%

Source: GLH Retail Capacity Tables, Tables 14A to H, Appendix 8

12.64 Tables 16A to C set out implied comparison goods turnovers of the District main centres in 2006, 2011 and 2016. In summary the implied turnovers are:-

Table 12.12 Comparison Goods Implied Turnovers			
Centre	Implied Turnover (£m)		
	2006	2011	2016
St Albans	£209.40m	£273.52m	£357.39m
Harpenden	£30.26m	£39.55m	£52.59m
St Albans Retail Park	£18.59m	£24.23m	£31.06m
Colney Fields Retail Park	£24.65m	£32.23m	£42.36m
Alban Park	£10.32m	£13.47m	£16.95m

Source: GLH Retail Capacity Tables, Tables 16A to C, Appendix 8

12.65 The comparison goods floorspace of both St Albans and Harpenden has been surveyed by GL Hearn. The estimated comparison goods sales floorspace within St Albans is 28,892sqm and for Harpenden the floorspace is 5,025sqm. Dividing the implied turnover of these two centres by their corresponding comparison goods floorspace provides an implied sales trading density for comparison goods floorspace in these towns. The resultant implied floorspace trading densities are:

Centre	Floorspace	Year		
		2006	2011	2016
St Albans	28,892 sqm	£7,248/sqm	£9,467/sqm	£12,370/sqm
Harpenden	5,025 sqm	£6,022/sqm	£7,872/sqm	£10,466/sqm

12.66 The implied trading densities for both St Albans and Harpenden are high, we would normally expect town centre comparison goods floorspace to trade at a density of around £5,000/sqm to £6,000/sqm. The implied densities suggest that the existing comparison goods facilities in both centres are overtrading.

12.67 Utilising our anticipated benchmark trading densities for Harpenden and St Albans and published trading density figures for the retail warehouse occupiers at St Albans (Abbey View) Retail Park, Alban Park and Colney Fields, our estimates of benchmark turnover for the District's comparison shopping centres are set out in Table 17, **Appendix 8**.

12.68 The benchmark turnovers for 2006 are increased by 1.5% per annum over the study period to reflect anticipated year on year improved trading efficiency.

12.69 Table 18, **Appendix 8** provides the theoretical comparison goods capacity by comparing the implied turnover of centres (Table 16) with the benchmark turnovers (Table 17).

12.70 For St Albans, the capacity calculations show a significant surplus of expenditure in 2006, which increases over the period to 2016. The surplus expenditure and theoretical comparison floorspace need for St Albans is set out below:

	2006	2011	2016
Implied	£209.40m	£273.52m	£257.39m
Benchmark	£166.69m	£179.57m	£193.45m
Surplus	£42.71m	£93.95m	£163.94m
Surplus as Floorspace	7,404 sqm	15,116 sqm	24,486 sqm

Source: GLH Retail Capacity Tables, Table 18, Appendix 8

12.71 For Harpenden, there is a small surplus of comparison goods expenditure which gives rise to a modest comparison floorspace need over the study period. The surplus expenditure and theoretical comparison floorspace need for Harpenden is set out below. If the comparison floorspace need is realised for St Albans, that centre will have improved comparison shopping offer and we anticipate that given the proximity between Harpenden

and St Albans some comparison trade will be drawn away from Harpenden town centre to St Albans thus reducing the need for comparison goods floorspace in Harpenden.

	2006	2011	2016
Implied	£30.26m	£39.55m	£52.59m
Benchmark	£26.92m	£29.00m	£31.24m
Surplus	£3.34m	£10.56m	£21.35m
Surplus as Sales Floorspace	624 sqm	1,829 sqm	3,434 sqm
<i>Source: GLH Retail Capacity Tables, Table 18, Appendix 8</i>			

- 12.72 The two retail warehouses parks in St Albans are trading below benchmark level ie undertrading. In these circumstances it is concluded that there is no additional need for bulky goods retail warehousing to serve St Albans.
- 12.73 The capacity calculations also suggest that Colney Fields comparison goods floorspace is undertrading. As previously discussed in relation to the convenience goods analysis, this retail park lies toward the edge of the Study Area and we would consider a significant proportion of its comparison goods turnover is drawn from outside the Study Area. Additionally the five comparison goods units at the park have only recently commenced trading and it is expected that their retail attraction and catchment has not as yet been fully realised. Accordingly, we concluded, having visited these stores that they trade well. However, as this is an out-of-centre retail park, we do not consider there is any justification to plan for its growth.

Neighbourhood Centre Comparison Goods Capacity

- 12.74 The Neighbourhood centres have a small amount of comparison goods retail offer and this serves either locally based needs or is of a specialist nature. The comparison shopping function of these centres is therefore limited. The household survey results for comparison shopping provides evidence of the limited role of comparison goods shopping in the Neighbourhood centres. The comparison shopping market shares of these centres is negligible, with little or no visits registered by respondents to the household survey. Thus the Neighbourhood centres are not the first choice for comparison goods shopping trips, however visual inspection shows that these centres are used for comparison shopping albeit at a lower level than the higher order centres such as St Albans and Harpenden.
- 12.75 We do not consider that the Council should be specifically planning for any increase in comparison shopping floorspace within the Neighbourhood centres and neither should a decline in the level of existing offer be anticipated.

13 THE QUALITATIVE NEED FOR RETAIL FLOORSPACE

13.1 PPS6 advises that in assessing the need and capacity for additional retail floorspace, local planning authorities should place greater weight upon quantitative need for additional floorspace. However the PPS advises that qualitative considerations should also be considered. In this section we briefly consider the qualitative need for additional convenience and comparison goods floorspace within St Albans and Harpenden. This qualitative need review has regard to GLH survey work (**Appendix 6**) in these centres, the shopper survey results (**Appendix 5**), the results of the Town Centre Business Questionnaire (**Appendix 4**) and existing retailer demand data (**Appendix 2**).

St Albans

13.2 Existing comparison goods shopping provision within St Albans City Centre is good, there is a mix of national multiple and local independent traders across a broad spectrum of retailer quality from value retail operators such as Wilkinsons, Woolworths and TK Maxx through to higher order multiples such as the White Company, LK Bennett and Bang and Olfsen.

13.3 The response to the street interview survey undertaken in St Albans shows that respondents were reasonably content with the centre (20% no need to improve). In terms of retail offer 7% would like more shops or a better choice of shops and 5% would like larger stores. With regard to specific stores, respondents considered St Albans lacked a department store (18%) with John Lewis specifically mentioned (11%) and clothes shopping was considered to be lacking (6%).

13.4 Retailer demand from comparison operators for representation in St Albans is strong (**Appendix 2 - Focus Report**) and those retailers are generally seeking premises of at least 100m² up to 1,000m² or larger.

13.5 Currently within St Albans there is limited availability of floorspace (low vacancy rate) and generally these are small unit sizes, thus the identified comparison retailer demand for St Albans is likely to be unsatisfied without the development of additional floorspace.

13.6 Therefore whilst qualitatively, St Albans has a good range of comparison shopping facilities, retailer demand, particularly for larger space units outstrips supply. Furthermore, shoppers within St Albans would like to have more shopping available to them particularly a department store. We therefore conclude that there is a qualitative need for more comparison shopping provision within St Albans City Centre.

- 13.7 Convenience shopping within St Albans City Centre is limited, comprising a Tesco Metro Store, a foodhall within M&S and 13 other smaller traditional convenience goods retailers.
- 13.8 For a centre of the size and function of St Albans, existing convenience shopping provision within the City Centre is considered qualitatively deficient. Tesco Metro and M&S, whilst used by some for their main food shopping, do not provide a full range of convenience goods. Therefore shoppers are using the Sainsbury, Morrisons and Waitrose stores outside the city centre for the main food shopping needs to the detriment of the City centre as a whole.
- 13.9 Qualitatively therefore we consider it is appropriate for St Albans City Centre to have a large foodstore capable of satisfying main food shopping needs as this will increase the overall attraction of the City centre to shoppers and facilitate linked shopping trips.

Harpenden

- 13.10 Comparison goods shopping provision in Harpenden is more limited than that available in St Albans. Comparison goods shopping is dominated by local independent and regional multiple traders, there are few national multiple comparison goods stores.
- 13.11 The street interview survey conducted within Harpenden showed that consumers would like more and better choice of shops (18%) and specifically clothes shops were considered to be lacking (17%).
- 13.12 There is some demand from comparison goods retailers for representation within Harpenden (**Appendix 2 – Focus Report**). These retailers are seeking units ranging from 50m² to 600m².
- 13.13 Harpenden functions as a district centre and it is considered that the existing comparison shopping provision is good given the centre's role and function and there is no perceived significant qualitative shortfall in Harpenden's comparison shopping. Furthermore, its proximity to St Albans with its range of higher order comparison goods stores acts as a competitive brake to any comparison shopping growth in Harpenden.
- 13.14 Convenience shopping in Harpenden is focused upon Sainsbury, Waitrose and M&S Food. These three stores have a reasonable range of goods but fall short of modern superstore standards in terms of range of goods sold and in store facilities. Therefore, there is considered to be scope for qualitative improvement to the existing provision within Harpenden. This qualitative deficiency coupled with the overtrading manifest in all three stores suggests that there is qualitative need for more convenience shopping provision.

13.15 This is likely to be best provided through an extension to one or more of the existing stores, within the town centre rather than the introduction of a new large store given the paucity of available sites in Harpenden town centre to accommodate such a store.

14 THE NEED FOR COMMERCIAL LEISURE FLOORSPACE IN ST ALBANS DISTRICT 2006-2016

- 14.1 In this section, the district wide capacity for additional floorspace is assessed in relation to commercial leisure development. A quantitative assessment is undertaken in respect to two specific types of commercial leisure development namely; cinemas and ten pin bowling. For ten pin bowling, information is available from a recognised source (Mintel) regarding the number of specific ten pin bowling games per capita played per annum within the UK. Following this, using an average for the number of people per lane per game, the total number of games per lane can be calculated. The available capacity for new ten pin bowling lanes is then calculated by subtracting the number of games per annum generated by existing facilities in the area and the theoretical total number of games per annum which will be generated by the population within the catchment area applying the above national average rates of usage.
- 14.2 For cinemas, the capacity assessment is possible because reliable information is available regarding trends and attendance rates. This allows the calculation of the specific number of screens required over a period of time in a given area.
- 14.3 The data on attendance and expenditure on other forms of commercial based development is less widely available and there is no reliable methodology translating the data into floorspace requirements. Therefore, for other forms of commercial leisure development we have simply carried out a qualitative assessment of need.

Capacity for Cinema Provision within the District

- 14.4 Currently, there is no cinema provision within the District and residents visiting the cinema travel to Hatfield, Hemel Hempstead, Luton or Watford. Given the status of St Albans City, a cinema facility may be appropriate. To establish the capacity (quantitative need) for cinema provision we have carried out an assessment based upon the St Albans and Harpenden core zones (from the retail capacity/household survey). The calculations are provided in **Appendix 10** and the methodology, data inputs and results are explained below.
- 14.5 The analysis is focused upon the St Albans and Harpenden core zones as these approximate to the District. Additionally, residents living within the outer fringe zones are arguably better placed in relation to cinema facilities located in Hatfield, Watford, Luton and Hemel Hempstead.

- 14.6 The population and forecast population for the St Albans and Harpenden core zones in combination is 132,497 in 2006, 134,661 in 2011 and 137,239 in 2016 (Table 1, **Appendix Eight**).
- 14.7 We have obtained three separate cinema visitation rates. Two are UK averages, one from the Office for National Statistics (ONS) the other from the UK Film Council. The UK Film Council also produce regional estimates of cinema visitation and the cinema visit rate for the London Television area has also been used. The visitation rates for 2004 vary between 2.9 times per annum (UK/ONS) and 4.1 times (London Television/UK Film Council).
- 14.8 Both ONS and the UK Film Council advise that there is a general upward trend in cinema visits, this is most marked in the age classifications below 35 years old. To take account of the trend to visit the cinema more often, we have allowed for modest increase in cinema visits of +1.0% per annum over the period to 2016.
- 14.9 Within Table 3, **Appendix Ten** we calculate the potential cinema visits within the St Albans and Harpenden core combined area. This is the product of population and cinema visitation rates.
- 14.10 To relate cinema visits per annum to a requirement for cinema seats and cinema screens, we adopt a cinema seat occupancy rate (Table 4, **Appendix Ten**). Cinema visits per annum are divided by the seat occupancy rate to establish a seat requirement for the Cinema Study Area. In 2006 the calculation indicates a theoretical capacity for 889 cinema seats, rising to 921 seats and 987 seats in 2011 and 2016 respectively.
- 14.11 To establish a cinema screen requirement we assume an average seat per screen rate of 200 and divide this by the number of seats required.
- 14.12 The cinema capacity calculation shows a need for:-
- | | |
|------|-------------|
| 2006 | 4.4 screens |
| 2011 | 4.6 screens |
| 2016 | 4.9 screens |
- 14.13 Rounding the screen requirement up indicates that the St Albans and Harpenden core zones could support a 5 screen cinema facility.

Capacity for Ten Pin Bowling within the District

- 14.14 We have assessed the need for ten pin bowling based only on the Harpenden Core Zone catchment area and the St Albans Zone catchment area respectively. This is because other zones within the overall catchment areas of the District are better or equally placed in terms of competing ten pin bowling facilities located in centres such as Stevenage, Watford and Hemel Hempstead.
- 14.15 On the basis on the assumptions made, The Ten Pin Bowling capacity Table attached at **Appendix 11** illustrates that there is capacity for a limited number of ten pin bowling lanes within the catchment through to 2016.
- 14.16 In terms of St Albans, broadly there is capacity for a facility of four lanes throughout the plan period. As this capacity is fairly small, it is unlikely that a stand alone ten pin bowling facility will be developed in the area. It is more likely that ten pin bowling needs will be met as part of a general leisure development incorporating a number of activities, should there be sufficient operator demand to build such a facility.
- 14.17 In terms of Harpenden, the need is unsurprisingly much less with no need for such a facility existing at present, but rising to effectively two lanes in 2011 through to the rest of the Development Plan period. Again, this is too small to support a stand alone facility and again is likely only to come forward as part of a more general leisure proposal.

Need for Other Forms of Commercial Leisure

- 14.18 There is currently little representation within St Albans of the large scale commercial leisure complexes run by national operators such as Esporta, or David Lloyd. The current representation is the Fitness First operation in Christopher Place and the Cannons health club at Highfield Park to the south of St Albans. There is no such representation within Harpenden. While we are unaware of any specific requirements from such operators at present it is envisaged that there is the potential to accommodate further such uses within St Albans (and potentially Harpenden) over the LDF period. In particular, there may be potential to accommodate such a use within a development on the Civic Centre South site (which is discussed in the following section). The Council has appointed consultants to prepare a Sport and Recreation Facilities Strategy which will cover supply and demand of health and fitness facilities in more detail.
- 14.19 In respect of the evening economy (namely public houses, restaurants and night clubs) both St Albans and Harpenden are very well catered for. St Albans, as the larger centre, has the greater range of evening economy operators but for a centre of its size, it has a high number of up market restaurants coupled with a substantial number of public houses and

operators which open later. As such, it is not considered that there is any qualitative deficiency in the evening economy of St Albans.

14.20 Harpenden as recognised by Harpenden Town Council has established a role for itself as an upmarket eating destination.

14.21 Our health check of Harpenden has confirmed it is a vital and viable centre albeit that a number of the retail units are under pressure from A3, A4 and A5 operators. In particular, we note the feedback from various parties that Harpenden is reaching saturation point regarding A3, A4 and A5 operators in the town.

14.22 As such, it is not considered that there is any qualitative need for further evening economy uses in Harpenden. However the existing provision in the town is focused toward adults and there is a perception that teenagers in Harpenden are not well catered for.

Conclusion

14.23 In conclusion our leisure need analysis indicates that quantitative need would support up to five cinema screens to serve the District population. There is limited scope for a full 10 ten-pin bowling facility to serve the District although a family entertainment centre type leisure development which could incorporate ten-pin bowling as part of a mixed commercial leisure facility may be appropriate. Both cinema and ten pin bowling/family entertainment centre uses are developer/operator led and whilst allocations could be made for such uses, the market will dictate whether such developments proceed.

14.24 Both St Albans and Harpenden are well provided for in terms of evening economy activities and we find no qualitative deficiency in the existing provision of public houses, restaurants and night clubs which needs to be addressed.

15 THE REQUIREMENT TO ALLOCATE NEW SITES

Introduction

15.1 In sections Twelve and Thirteen we have identified a quantitative and qualitative need for new retail and commercial leisure development in St Albans.

Requirement to Allocate Sites within the Local Plan Review

15.2 Set out within Section Two is an overview of PPS6 Guidance which requires that local authorities should only seek to allocate sites in order to meet identified need for new retail and commercial leisure floorspace. In allocating such sites, local authorities must adopt the sequential approach to site selection, giving first preference to town centre sites, followed by edge-of-centre sites, district and local centres and only then out-of-centre sites in locations that are accessible by choice of means of transport. In particular areas, growth which cannot be accommodated within existing centres should be accommodated as an extension of the primary shopping area.

15.3 On this basis, we have restricted our search for potential sites to accommodate the illustrated need to central locations and edge of centre sites in close proximity to the primary shopping frontages.

15.4 In our assessment of sites which could potentially accommodate the required need, we have given consideration to the adopted local plan, and our own “*on the ground*” assessment.

15.5 We have therefore considered the following sites:

- Land East of Drovers Way
- Bricket Road Car Park
- Drovers Way car park site and adjoining school
- Civic Centre South

These sites are shown on Map 2 - St Albans City Centre Plan. We now consider each of these sites in turn.

Land East of Drovers Way

- 15.6 The adopted local plan identifies three allocations which suggest potential retail development on land south of Drovers Way. These are sites 2A, 2B and 2F as identified in Policy 116 of the adopted local plan. There are significant development constraints associated with these sites. The sites comprise backland space situated behind the prime retail frontages of St Peter's Street. Furthermore, access to these sites is problematic unless development occurs as part of an extension to units fronting St Peter's Street and without this new retail units would have no commercial prominence.
- 15.7 We understand that the Council has previously undertaken substantial inquisitive work regarding a possible retail development focused on the Drovers Way Car Park site. We are aware that this work included consideration of a scheme based on an extended or redeveloped Marks & Spencer store. However this investigation did not include any consideration of sites 2S, 2B and 2F in isolation.
- 15.8 In the absence of any firm indication from retailers fronting St Peter's Street requiring extension of their existing stores, we do not consider there is any substantial merit in pursuing any potential redevelopment of these sites.

Bricket Road Car Park Site

- 15.9 The existing decked car parking at Bricket Road is, we understand to be the subject of a forthcoming planning application for a comprehensive redevelopment scheme comprising cinema, restaurant and residential uses. We are advised that no retail (A1) component is proposed. We understand that the Council has selected a preferred developer.

Drovers Way Car Park Site and Adjoining School

- 15.10 A site focused on the Drovers Way Car Park site and adjoining Aboyne Lodge Primary School has previously been identified as a potential area to meet further retail development needs in St Albans. The Council's previous retail consultants Vincent & Gorbing as part of the local plan review in April 2001 undertook a detailed evaluation of the site in terms of its capacity for accommodating additional retail development.
- 15.11 The Council and its consultants considered three options for retail development on the site, namely:-
1. Large Shopping Mall development utilising the whole site including Aboyne Lodge Primary School.

2. Small shopping mall on the land confined to south of the site, excluding Aboyne Lodge Primary School.
3. Extension of existing Marks & Spencer store to provide a single large retail unit.

We understand the Council's consultants considered that only options 1 and 2 were worth pursuing.

- 15.12 As a result of the initial work undertaken by consultants, we understand that Members resolved, in April 2002 to support the principle of a retail development scheme on this site. Consultants were subsequently commissioned to liaise with relevant parties to identify views on the site's potential. It was agreed in order for the site to accommodate the necessary critical mass, the Aboyne Lodge Primary School would need to be included within the site. However, we understand that the school and members were adverse to the inclusion of the school within any potential development site.
- 15.13 As such, we understand that Members are of the view that this site is not suitable in whole to accommodate an extension of the shopping provision within St Albans. Potentially, the scheme could be developed using only the Drovers Way multi-storey car park site and possibly part of the service yard of some of the units fronting St Peter's Street. However, we do not believe such a scheme is likely to be viable partly due to the significant loss of parking that is likely to be involved.
- 15.14 The Drovers Way site is also constrained by Victorian properties to the west and south west and by the rear service yards of the retail units fronting St Peter's Street. Any significant development of the site, is thus likely to be constrained to a degree by residential amenity concerns and potentially, servicing issues.
- 15.15 In summary, we understand that the development of a site at Drovers Way encompassing the existing multi-storey car park and adjoining Aboyne Lodge Primary School has been considered by Members and rejected.
- 15.16 Notwithstanding the above and given the level of retail need identified in this study, it is our view that this site may need further consideration if other sites do not come forward for redevelopment over the Plan period. This view clearly acknowledges that there would be significant difficulties in securing a comprehensive redevelopment scheme on this site.

Civic Centre South

- 15.17 The Civic Centre South site is located between Victoria Street and Bricket Road within the St Albans Conservation Area. It sits adjacent to the Bricket Road car park which is the site

of a proposed cinema/residential development and opposite the entrance to the Maltings Shopping Centre.

- 15.18 In total the site as allocated within the adopted local plan extends some 0.77ha (1.9 acres).
- 15.19 The site comprises a number of uses, including Hertfordshire House and car park, the Magistrates Court, St Albans Police Station the Health Centre for St Albans and Harpenden Primary Care Trust and a historic burial ground associated with the Quaker Society of Friends.
- 15.20 We are aware that the Civic Centre South site is identified as a development site in the Adopted Plan (1994). We are aware that part of the site (Hertfordshire House) is currently for sale. We are also aware of the report which has been undertaken by the BPS Chartered Surveyors regarding the financial viability of a development scheme on the site.
- 15.21 Having considered the options, we are of the view that there is merit in undertaking further work on this site. We note that part of the site is available and that other parts of the site such as the St Albans Police Station may become surplus to operational requirements sometime after the end of 2007.
- 15.22 In addition to the site area identified in the Adopted Local Plan, we have also suggested that any development of the site could include Forrester House which comprises the Ladbrokes/Gregg's Bakers units with offices above (albeit planning permission has been granted for the change of the first and second floor offices to residential). Potentially the site could also accommodate the large block of units from 121 Victoria Street. (These additional elements of the site are discussed below).
- 15.23 In terms of the relocation of existing uses, we understand that the Department of Constitutional Affairs (DCA) has no current intention to relocate the Magistrates Court. However, this is not to say that the DCA would be adverse to any relocation provided that a suitable alternative site was found.
- 15.24 We understand BPS Surveyors, on behalf of St Albans Council has looked at the potential viability of the development of this site and on the basis of the Council's aspirations for the site and the potential land uses identified in Policy 116 of the Local Plan, a retail-led redevelopment scheme is unlikely to prove viable.
- 15.25 Although the Report confirms the site continues to represent an important long term opportunity for the expansion of the commercial centre of St Albans, it is considered that its potential for retail development is likely to be limited to secondary or specialist relatively low

value retail uses unless the site area can be significantly expanded and better links created with the prime retail area.

- 15.26 It is not within the scope or remit of this Assessment to provide detailed analysis of this site in terms of its development potential, viability, or otherwise. Notwithstanding this we have, by way of illustration undertaken some very brief urban design “cartoons” of the potential floorspace which could be developed on site.
- 15.27 We have examined two options, one a freestanding foodstore and one a town centre scheme which could comprise an anchor development store and other floorspace such as leisure etc. Attached at **Appendix 12** is drawing number J014826/1 illustrating a new comparison goods shopping/mixed use mall arrangement with a central area possibly suitable for a food court. Although no elevational drawings are included, it is anticipated that development could accommodate three, four or five storey development. It is also suggested that there is an opportunity to provide some multi-storey car parking above ground floor shops most likely towards the back of the site with a ramp access arrangement. The ability to accommodate a potential department store on site would ensure development became a potential destination in its own right, and could effectively be the third tip of a triangle based around the Civic Centre site, the Maltings Shopping Centre, and the main primary shopping frontage to the north of St Peter’s Street.
- 15.28 The ability of the site to accommodate a significant level of floorspace is important if a department store or other large space users are to be attracted to the site. It is also the case that department stores require a financial incentive, such as a rent free period etc, to locate within a particular scheme in recognition of their ability to act as an anchor in securing other prelets. The inclusion of a department store in any scheme could therefore mean that additional upper floors or other revenue generating uses may have to be included to ensure viability.
- 15.29 Although not shown on the drawing, it is the considered view of GL Hearn’s Retail Agency Department that commercial schemes would benefit from the inclusion of the block incorporating 1-21 Victoria Street and possibly a corner property along St Peter’s Street. We are aware that this block includes some listed and locally listed buildings.
- 15.30 Also, attached at **Appendix 12** is drawing number J014826/2 illustrating a foodstore development on the site of approximately 2,500m² at ground floor level with surface level car parking. It is suggested that any store would have frontage to Victoria Street with access from the store entrance in a direct line to the Maltings Shopping Centre and to the new enhanced plaza in front of the St Albans Arena.

15.31 It is agreed the location is secondary. However, the potential removal of Forrester House to create an enhanced “*plaza*” area in front of the St Albans Arena, improvements to the urban realm plus the potential to provide links to, and improvements to, what is currently an unattractive secondary entrance to the Maltings Shopping Centre could make a retail development on the site attractive, provided the scheme had sufficient critical mass.

Conclusion

15.32 Our recommendation is that a more detailed scoping of the Civic Centre South site be undertaken. Initial discussions should be held with potential operators and potential developers. We would recommend that a development brief for the site be produced which could give developers more guidance and certainty as to the Council's expectations for the site. With the exception of Civic Centre South, and the Bricket Road car park site, we have not identified any sites adjacent to the primary shopping area in St Albans City Centre which have significant development potential for large scale retailing.

15.33 It is possible that the Drovers Way site may require further consideration given the level of retail need identified. However, it is our recommendation that the Civic Centre South site is progressed further first as we believe this site offers a greater opportunity and more benefits to St Albans City Centre.

15.34 Although this site has been allocated for a number of years, we are of the view that it remains an important development opportunity within St Albans City Centre. It is likely that the forthcoming cinema/residential scheme on the adjacent Bricket Road Car Park site may give rise to additional interest in this area.

15.35 We are aware that significant work has been done by other consultants on this site. However, we are of the view that the presence of a development brief providing firm planning guidance for the development of the site will, make the site more attractive to certain uses such as department store operators.

16 CONCLUSIONS AND RECOMMENDATIONS

- 16.1 The health of the main centres within the District has been assessed.
- 16.2 The study has confirmed that St Albans is a healthy and vibrant City Centre functioning at a level appropriate to its major sub-regional centre status.
- 16.3 The assessment of Harpenden concludes that the town remains a vital and vibrant centre although concerns have been expressed regarding the excessive proliferation of evening economy uses and concerns regarding rising retail rents.
- 16.4 The neighbourhood centres of Fleetville, Southdown and Marshalswick are considered to perform district centre functions. Redbourn, London Colney and Wheathampstead should be located further down the shopping hierarchy. Verulam Centre should not be given any formal designation within the LDF hierarchy of retail centres.
- 16.5 The retail need assessment confirms that by 2011 the convenience goods expenditure surplus of £31.64m would equate to a convenience goods sales floorspace requirement of some 2,805m² within St Albans City Centre.
- 16.6 In Harpenden, by 2011 there is expected to be a convenience goods expenditure surplus of £27.55m equating to a convenience goods sales floorspace requirement of some 2,443m².
- 16.7 Turning to comparison goods, St Albans City Centre is expected to have surplus comparison goods expenditure by 2011 of £93.95m which would equate to a comparison goods floorspace requirement of some 15,116m² sales area. Harpenden is estimated to have a comparison goods expenditure surplus of £10.56m by 2011 equating to a sales floorspace requirement of some 1,829m².
- 16.8 In terms of allocating sites for meeting future retail need it is considered that the Civic Centre South site in St Albans should retain its Local Plan allocation as a potential retail redevelopment site. Further work is required in order to assess the level of floorspace which could be accommodated on this site, which will in turn dictate whether any additional sites are required to be allocated for retail development with the City Centre.
- 16.9 In terms of Harpenden, we do not believe there is any requirement to allocate any further new retail sites at this time. We consider that potentially some of the excess capacity for convenience goods could be accommodated through the alternative use of existing retail units or extensions to existing stores.

- 16.10 Existing comparison goods shopping in St Albans is good however, retailer demand currently outstrips supply (particularly for larger space users). We therefore conclude there is a qualitative need for more comparison goods shopping in St Albans City Centre.
- 16.11 The existing convenience floorspace within St Albans City Centre is considered deficient. We consider it appropriate for St Albans City Centre to have a large foodstore capable of satisfying main food shopping needs to increase the overall attraction of the City Centre to shoppers.
- 16.12 There is no perceived significant qualitative shortfall in Harpenden's comparison shopping. However, there is considered to be scope for qualitative improvement to the existing convenience goods shopping provision. We believe this is best provided through an extension to one or more of the existing stores.
- 16.13 In terms of the need for new leisure facilities the Assessment confirms a need for a 5 screen cinema facility over the study period. However, the qualitative need for ten pin bowling facilities is considered to be very limited in both St Albans and Harpenden.
- 16.14 In respect of the evening economy, it is considered that both St Albans and Harpenden are well catered for (although there is a perception that Harpenden's evening economy provision does not cater adequately for teenagers).

Recommendations

- 16.15 The prime recommendation relates to the Civic Centre South site. We recommend that a Development Brief for this site is prepared as soon as possible. This should include canvassing relevant developers and operators to assess potential market demand.
- 16.16 Finally, we are aware from the local press that a major food store operator is currently assembling a site within St Albans. We consider that this proposal will need to be rigorously assessed in order to ensure that the proposal does not conflict with the Council's forthcoming retail strategy for the LDF or the provisions of PPS6.