St Albans City & District Council

SHOPPING MONITORING REPORT

APRIL 2010

City and District of St Albans, Council Offices, Civic Centre, St Albans. AL1 3JE

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Cover Picture: Part of Primary Shopping Frontages in St Albans

1.0 INTRODUCTION

1.1 The Council's Planning Policy team gathers retail information on an annual basis for St Albans City Centre and Harpenden Town Centre, together with the District's neighbourhood and local centres. This monitoring information has been used to assess the effectiveness of the Council's retail planning policies in the District Local Plan and will guide the preparation of future retail policies as part of the Local Development Framework for the District.

1.2 The retail monitoring, on which this report is based, was undertaken during April 2010, in order to tie in with the monitoring requirements set out in Section 35 of the Planning and Compulsory Purchase Act 2004. This requires Local Authorities to submit an Annual Monitoring Report for the period 1st April 2009 to 31st March 2010, to the Secretary of State.

1.3 This report sets out the adopted Local Plan policy context for retailing in the St Albans District. It goes on to provide detailed information in terms of use classes (A1-A5) lying within the primary, secondary and 'Class A' shopping frontages in St Albans City Centre and Harpenden Town Centre. It also examines trends in the number of vacant units in each shopping frontage. Similar information has been collected for the seven neighbourhood centres and twenty five local centres in the District.

1.4 Information is provided on all major retail development in edge of centre or out of centre locations, together with all major food stores in the District. Appendix 1 contains details of all completed and outstanding planning permissions in allocated retail frontages and the edge of town/out of town centres, as of 31st March 2010.

1.5 The Shopping Monitoring Report includes an assessment of the proportion of retailers within St Albans City Centre that can be classified as major or 'multiple' retailers. This information gives a good indication as to the strength and attractiveness of the City Centre for small, independent shops and niche retailers.

1.6 It is important to bear in mind the national retail policy context when assessing the effectiveness of our district-wide local planning policies. Planning Policy Statement 4 (PPS4) *Planning for Economic Growth* sets out the Government's comprehensive policy framework for planning for sustainable economic development in urban and rural areas, including town centres. It draws together into one single statement the previous 2008 draft consultations on PPS4: Sustainable Economic Development and PPS6: Planning for Town Centres.

1.7 Government policy advocates the 'sequential approach' to meeting identified need for new retail floorspace within established town centres. This has helped local authorities to resist out of centre development and maintain the vitality and viability of their existing centres. In addition, the Good Practice Guide on Need, Impact and the Sequential Approach has also been published to help plan making and/or preparing assessments in support of planning applications.

1.8 As highlighted in previous Monitoring Reports, St Albans continues to face competition from neighbouring districts in terms of new retail floorspace. The Riverside development in central Hemel Hempstead (Dacorum Borough) provides approximately 20,000 square metres of additional retail floorspace, including a department store, a number of smaller shop units and restaurants. The neighbouring authorities of Watford and Welwyn Hatfield are both investigating possibilities for enhancing their retail offer.

1.9 This report monitors the changes to the shopping unit usage and is not an economic evaluation of the centres. The Retail Study Update 2009 contains an assessment of the vitality and viability of St Albans City Centre and Harpenden Town Centre. It is based on key performance indicators set out in Planning Policy Statement 4 and is known as a town centre healthcheck.

1.10 More detailed evidence regarding floorspace requirements, rental levels, retail yields and competing centres can be found in the Retail and Leisure Needs Assessment 2006 and in the Retail Study Update 2009.

1.11 St Albans is functioning at an economic level appropriate to its major town centre status and is a healthy and vibrant city. Although the City Centre lacks a major department store it offers a good choice of independent specialist retailers. There is good demand for retail floorspace.

1.12 Harpenden- a thriving District Centre, caters to an affluent market as indicated by the presence of higher end retailers. It has few vacancies and is an attractive centre but its vitality and viability may be threatened by a loss of A1 floorspace particularly to A3, A4 and A5 uses.

1.13 A major attraction to the City Centre is the number of markets regularly held in St Peters Street. With a capacity of 170 stalls, running from French Row through the city centre to the top of Catherine Street, the regular Market is held every Wednesday and Saturday and offers a wide range of goods. About 25% of the stalls sell food produce. Smaller specialist markets are held throughout the year, including a monthly Farmers Market selling local produce. A French Market lasting for two to four days is held about three times a year and a similar Italian Market about twice a year. Additional markets are usually held to complement any ‘special’ events like the switching on of the Christmas Lights. Harpenden and Wheathampstead too, have their own monthly Farmers Markets.

2.0 LOCAL PLANNING CONTEXT

2.1 This report should be read in conjunction with Chapter 6 of the St Albans District Local Plan Review (adopted 1994), which sets out the Council's policies on shopping and service uses. The overall strategy on shopping and service uses is set out in Policy 51.

2.2 Policies 52 to 54 provide guidance on shopping development in St Albans City Centre, Harpenden Town Centre and the Neighbourhood Centres respectively and each policy refers to a defined hierarchy of shopping frontages as shown on the District Plan Proposals Map and set out below:

- Primary Shopping Frontages;
- Secondary Shopping Frontages; and
- Class ‘A’ Frontages.

Policy 55 deals with local shopping facilities.

2.3 Policies 56 and 57 are concerned with the loss of retail floorspace and the location of service uses. The Plan adopts a percentage approach to the retention of retail (A1) units within designated shopping frontages, stipulating that:

(i) At least 90% of the built up length of Primary Shopping Frontages at ground floor level should remain in Class A1 (retail) use;

(ii) At least 60% of the built up length of Secondary Shopping Frontages at ground floor level should remain in Class A1 (retail) use;

(iii) Changes of use from Class A1 to service uses (i.e. A2 financial & professional uses or A3 food & drink uses) are acceptable in Class ‘A’ Frontages, subject to compliance with Policy 57.

2.4 The Use Classes Order was amended in 2005 and the old A3 (food and drink) class was sub-divided into:

- A3 - Restaurants and Cafes
- A4 - drinking establishments
- A5 - hot food takeaways.

2.5 Guidance on major development outside existing town centres is found in Policy 58.

2.6 In Local Centres, whilst frontage lengths are not measured, Policy 56 states that applications for the loss of retail (A1) floorspace will only be considered acceptable if sufficient shops remain to cater for the daily needs of the local population.

2.7 Changes to the planning system nationally mean that local planning authorities are now required to produce a Local Development Framework (LDF) which will include a series of Development Plan Documents (DPDs) to replace existing Local Plans. During the evidence gathering stage of DPD preparation, it may be considered appropriate to suggest revisions to the District’s existing shopping frontage designations as a result of the key findings of the Council’s Shopping Monitoring Reports.

2.8 Monitoring has an important part to play in measuring implementation of existing Local Plan and emerging Development Plan Document (DPD) policies. The Planning and Compulsory Purchase Act 2004 recognises this and provision has been made in the Act for every local planning authority to submit an Annual Monitoring Report (AMR) to the Secretary of State. Information on retail performance and the success of existing and future retail policies will be an integral part of the AMR.

3.0 ST ALBANS CITY CENTRE

3.1 St Albans City Centre is the main retail centre in the District. It also accommodates a wide range of business, leisure, community and residential uses.

3.2 As part of background work to develop a sound evidence base for Development Plan Document preparation, the Council commissioned consultants to undertake a detailed retail and leisure need assessment, which was carried out in line with government guidance. This was followed up by a Retail Study Update in 2009. The findings will inform the Council as to whether any site within St Albans City Centre, Harpenden Town Centre or elsewhere in the District should be identified in the forthcoming DPDs for retail redevelopment.

3.3 The main conclusions in the Retail Study Update 2009 with regard to St Albans City Centre are summarised below:

- The health of the existing retail centres in the District is good. However, the City Centre lacks a major department store and foodstore to anchor its retail offer. There has also been limited retail investment and development in the city for a number of years since The Maltings opened. As a result, St Albans currently has a limited stock of larger modern shop units to meet the increasing requirements from multiple retailers for space in the centre.

- By 2016, there will be a quantitative need for a net additional 1,070 sq metres of convenience goods floorspace in St Albans;

- Given the deficiency in existing convenience goods offer in the City Centre, there is a qualitative need for a large foodstore capable of satisfying main food shopping needs, located in or immediately adjacent to the City centre;

- By 2016, there is a quantitative need for a net additional 10,740 sq metres of comparison goods floorspace in the St Albans sub-area;

- A sequential approach to site assessment indicates that the Civic Centre South site and Land West of St Peters Street provide the best opportunities for comprehensive redevelopment schemes in St Albans City Centre.

- Out of centre shopping provision - In policy terms any identified need for new comparison and convenience goods floorspace should be directed to town centre and edge-of-centre sites in the first instance. Any applications for new out-of-centre retail floorspace will have to satisfy the key tests of government guidance.

3.4 Maintaining a broad range of uses is seen as beneficial to the vitality and viability of the City Centre. The Cathedral Quarter is the medieval core of the City of St Albans, and includes the Cathedral itself and the streets in its vicinity (listed below). The area has a high proportion of historic buildings, specialist shops and a variety of quality restaurants and the aim is to promote and improve the area for the benefit of both traders and visitors.

Streets Forming the Cathedral Quarter

Chequer Street	Heritage Close	Spencer Street
Christopher Place	High Street	Upper Dagnall Street
French Row	Holywell Hill	Verulam Road
George Street	Market Place	Village Arcade

3.5 Since 2003, information has been collected on the proportion of units within St Albans City Centre occupied by 'UK multiple' retailers (i.e. those stores with representation in other towns and cities in the UK). Whilst there has been very little change since 2003, it will be interesting to assess changes in retailer representation over coming years. However, at present, whilst it is unsurprising to see a high percentage of multiples in PSF3 (Christopher Place) and PSF10 (1 to 57 St Peter's Street), 71% and 94% respectively, the strength of the Cathedral Quarter as a location for independent, niche retailers is evident. For example, in PSF5 (1-13 George Street) and PSF12 (3-33 High Street) the proportion of UK multiple retailers is low at 7% and 21% respectively. Independent/niche retailing is also strong along Holywell Hill, where the proportion of multiple retailers in SSF7 (2-34 Holywell Hill) and SSF6 (1-23 Holywell Hill) is only 13% and 17% respectively.

3.6 In 2003-2004 the Council produced a St Albans City Centre Audit Performance Indicators Report, which assesses the overall vitality and viability of the City Centre. The Retail and Leisure Need Assessment 2006 and the Retail Update 2009 include detailed health checks for St Albans and Harpenden centres, as recommended in PPS4.

St Albans City Centre Shopping Frontages

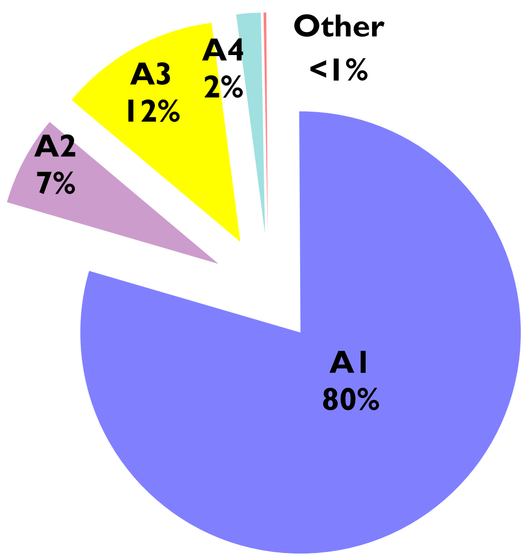
3.7 The City Centre's Primary Shopping Frontages are listed below. A1 use accounts for 80% of the Primary Frontages with the highest proportions in PSFs 8, 9 and 10 which have 90% or more; A2 use is highest in PSF1 with 41% of the frontage but overall A2 use accounts for 7% of the Primary Frontages; A3 use has 12% of the frontage with the highest concentration in in PSFs 11 and 12.

Table 1: St Albans City Centre PRIMARY Shopping Frontages - Existing Uses

Ref*	Frontage	Frontage Length In Metres And Percentage													
		Total	A1	%	A2	%	A3	%	A4	%	A5	%	Other	%
PSF1	3-37 Chequer Street	106.9	46.4	43	43.4	41	17.1	16	0.0	0	0.0	0	0.0	0
PSF2	2-38 Chequer Street	159.0	95.6	60	27.4	17	0.0	0	31.0	19	0.0	0	5.0	3
PSF3	Christopher Place (Inner Courtyard)	211.7	185.8	88	0.0	0	25.9	12	0.0	0	0.0	0	0.0	0
PSF4	3-21 French Row	53.5	40.0	75	0.0	0	13.5	25	0.0	0	0.0	0	0.0	0
PSF5	1-13 George Street	80.6	64.0	79	0.0	0	16.6	21	0.0	0	0.0	0	0.0	0
PSF6	18-28 George Street	85.0	67.0	79	0.0	0	18.0	21	0.0	0	0.0	0	0.0	0
PSF7	The Maltings	461.7	408.4	88	7.9	2	45.4	10	0.0	0	0.0	0	0.0	0
PSF8	1-37 Market Place	134.6	121.6	90	5.0	4	8.0	6	0.0	0	0.0	0	0.0	0
PSF9	6-38 Market Place	87.5	82.5	94	5.0	6	0.0	0	0.0	0	0.0	0	0.0	0
PSF10	1-57 St. Peter's Street	180.0	167.5	93	12.5	7	0.0	0	0.0	0	0.0	0	0.0	0
PSF11	2-20 High Street	67.3	29.5	44	15.1	22	22.7	34	0.0	0	0.0	0	0.0	0
PSF12	3-33 High Street	107.0	71.0	66	0.0	0	36.0	34	0.0	0	0.0	0	0.0	0
	Total	1734.8	1379.3	80	116.3	7	203.2	12	31.0	2	0.0	0	5.0	<1

*as defined by District Plan Review Policy 52

St Albans Primary Frontages – Existing Uses



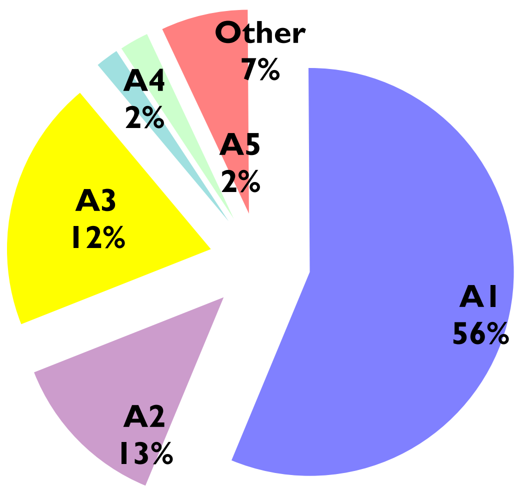
3.8 In the Secondary Shopping Frontages A1 use accounts for 56% of the frontage; A2 has 13%, although most of this is concentrated in areas 7, 8 and 9; A3 accounts for 20% of the frontage with a cluster of restaurants in SSF 12 and a few in 1, 3 and 10.

Table 2: St Albans City Centre SECONDARY Shopping Frontages - Existing Uses

Ref*	Frontage	Frontage Length In Metres And Percentage											
		Total	A1	%	A2	%	A3	%	A4	%	A5	%	Other	%
SSF1	1-39 Catherine Street	79.5	39.5	50	0.0	0	22.0	28	0.0	0	13.0	16	5.0	6
SSF2	8-28 Catherine Street & 93 St. Peter's Street	85.5	62.0	73	0.0	0	4.5	5	0.0	0	0.0	0	19.0	22
SSF3	Heritage Close	72.0	44.0	61	0.0	0	28.0	39	0.0	0	0.0	0	0.0	0
SSF6	1-23 Holywell Hill	73.0	51.5	71	0.0	0	6.0	8	0.0	0	0.0	0	15.5	21
SSF7	2-34 Holywell Hill	100.0	47.0	47	34.0	34	19.0	19	0.0	0	0.0	0	0.0	0
SSF8	1-9 London Road	62.5	35.2	56	21.3	34	0.0	0	0.0	0	0.0	0	6.0	10
SSF9	2-46 London Road	124.9	59.6	48	39.8	32	0.0	0	16.5	13	5.0	4	4.0	3
SSF10	61-85 St. Peter's Street	118.9	75.3	63	6.5	5	37.1	31	0.0	0	0.0	0	0.0	0
SSF11	1 Spencer Street	23.5	23.5	100	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0
SSF12	1-11 The Colonnades	58.5	11.0	19	0.0	0	42.5	73	0.0	0	0.0	0	5.0	9
	Total	798.3	448.6	56	101.6	13	159.1	20	16.5	2	18.0	2	54.5	7

*as defined by District Plan Review Policy 52

St Albans Secondary Frontages – Existing Uses



3.9 The level of vacancies remains fairly low despite the recession. The total number of vacant units in the City Centre Primary Shopping Frontages has fallen to 9 compared to 13 last year. (See Table 3). The Maltings has only one vacant unit out of a possible 47. The vacancy rate for all of St Albans City centre stands at 6.9% with the primary shopping frontages having only a 4.4% vacancy rate.

Table 3: PRIMARY Shopping Frontages - Vacant Units 2000-2010

Ref*	Frontage	No of Units	Vacant Units										
			2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
PSF1	3-37 Chequer Street	13	0	0	1	2	2	0	3	0	0	1	0
PSF2	2-38 Chequer Street	19	0	1	0	0	0	0	0	0	2	2	3
PSF3	Christopher Place (Inner Courtyard)	21	6	14	8	1	1	0	0	0	0	2	1
PSF4	3-21 French Row	8	1	0	0	0	0	0	0	0	1	0	0
PSF5	1-13 George Street	14	0	1	0	1	1	0	1	1	0	1	0
PSF6	18-28 George Street	11	0	0	1	1	1	0	0	2	1	0	1
PSF7	The Maltings	47	7	3	4	1	0	2	2	2	1	4	1
PSF8	1-37 Market Place	19	0	0	0	0	0	0	1	2	0	1	0
PSF9	6-38 Market Place	12	0	1	0	1	0	1	0	0	0	0	1
PSF10	1-57 St. Peter’s Street	18	0	0	0	0	0	0	0	0	0	1	1
PSF11	2-20 High Street	6	0	0	0	0	0	0	0	0	0	0	0
PSF12	3-33 High Street	14	0	0	0	0	2	0	0	0	1	1	1
	Total	202	14	20	14	7	7	3	7	7	6	13	9

2010 Vacant Units by Use Class

Ref*	Frontage	No of Units	A1	A2	A3	A4	A5
PSF1	3-37 Chequer Street	13	0	1	0	0	0
PSF2	2-38 Chequer Street	19	2	0	0	1	0
PSF3	Christopher Place (Inner Courtyard)	21	2	0	0	0	0
PSF4	3-21 French Row	8	0	0	0	0	0
PSF5	1-13 George Street	14	1	0	0	0	0
PSF6	18-28 George Street	11	0	0	0	0	0
PSF7	The Maltings	47	3	0	1	0	0
PSF8	1-37 Market Place	19	1	0	0	0	0
PSF9	6-38 Market Place	12	0	0	0	0	0
PSF10	1-57 St. Peter’s Street	18	1	0	0	0	0
PSF11	2-20 High Street	6	0	0	0	0	0
PSF12	3-33 High Street	14	1	0	0	0	0
	Total	202	11	1	1	1	0

*as defined by District Plan Review Policy 52

3.10 The number of vacant units in the City Centre Secondary Shopping Frontages has fallen to 8 out of a possible 102 during 2009 – 2010. The most vacancies are in SSF10 at the northern end of St Peters Street (see Table 4), where it appears that units are being kept empty pending a possible redevelopment scheme. Despite this the vacancy rate is still only 7.9% for the Secondary Shopping Frontages.

Table 4: SECONDARY Shopping Frontages - Vacant Units 2000-2010

Ref*	Frontage	No of Units	Vacant Units										
			2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
SSF1	1-39 Catherine Street	11	1	0	0	0	0	1	0	0	0	0	0
SSF2	8-28 Catherine Street & 93 St. Peter’s Street	7	0	0	0	0	0	0	0	0	0	0	0
SSF3	Heritage Close	8	3	2	3	1	2	4	0	0	0	0	0
SSF6	1-23 Holywell Hill	12	1	2	0	0	0	1	1	0	1	2	1
SSF7	2-34 Holywell Hill	15	0	1	0	0	1	1	0	0	2	4	2
SSF8	1-9 London Road	6	1	2	4	3	0	0	0	0	0	1	1
SSF9	2-46 London Road	18	1	0	1	0	1	1	0	0	1	0	1
SSF10	61-85 St. Peter's Street	17	1	0	3	1	0	1	2	1	5	5	3
SSF11	1 Spencer Street	1	0	0	0	0	0	0	0	0	0	0	0
SSF12	1-11 The Colonnades Verulam Road /Upper Dagnall Street	6	2	3	3	1	2	2	0	0	0	1	0
	Total	101	10	10	14	6	6	11	3	1	9	13	8

2010 Vacant Units by Use Class

Ref*	Frontage	No of Units	A1	A2	A3	A4	A5
SSF1	1-39 Catherine Street	11	0	0	0	0	0
SSF2	8-28 Catherine Street & 93 St. Peter’s Street	7	0	0	0	0	0
SSF3	Heritage Close	8	0	0	0	0	0
SSF6	1-23 Holywell Hill	12	0	0	1	0	0
SSF7	2-34 Holywell Hill	15	2	0	0	0	0
SSF8	1-9 London Road	6	1	0	0	0	0
SSF9	2-46 London Road	18	1	0	0	0	0
SSF10	61-85 St. Peter's Street	17	2	0	1	0	0
SSF11	1 Spencer Street	1	0	0	0	0	0
SSF12	1-11 The Colonnades Verulam Road /Upper Dagnall Street	6	0	0	0	0	0
	Total	101	6	0	2	0	0

* as defined by District Plan Review Policy 52

3.11 Within the City Centre Class A Frontages (see Table 5) the vacancy rate is 9.2%. The worst performing Class ‘A’ frontage is still AF5, (67-89 London Road) which has declined further, and now has only one unit out of 7 occupied. This situation was primarily due to land assembly for a potential development site (which has now been abandoned), rather than a lack of commercial interest in these units as retail premises and it is proposed to refurbish the existing buildings. Also in London Road is AF6 which has 2 vacant units out of a possible 29.

Table 5: St Albans City Centre CLASS A Shopping Frontages

REF.*	FRONTAGE	NUMBER OF UNITS						VACANT UNITS											VACANCIES/USE CLASS				
		Total	A1	A2	A3	A4	A5	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	A1	A2	A3	A4	A5
AF1	41-63 Catherine Street	11	10	1	0	0	0	1	2	0	0	4	3	5	4	3	2	0	0	0	0	0	0
AF2	6-14 Hatfield Road	4	3	0	1	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
AF3	61-63 Lattimore Road & 80/80A Victoria Street	5	3	0	0	0	1	0	0	0	1	2	3	1	0	0	0	0	0	0	0	0	0
AF4	13-29 London Road & 1-9 Marlborough Road	9	5	3	0	0	0	0	0	0	2	2	1	1	0	0	1	1	0	1	0	0	0
AF5	67-89 London Road	7	4	1	0	0	2	2	4	4	5	5	6	3	4	4	4	6	3	1	0	0	2
AF6	92-164 London Road	29	16	1	3	1	6	2	1	1	1	2	2	5	3	1	4	2	1	0	1	0	0
AF7	113-117 London Road & 1-6 Francis Court	5	0	3	1	0	0	0	1	2	2	2	2	2	2	2	2	3	0	3	0	0	0
AF8	4 St. Peters Street-Forrester House & 1-9 Victoria Street	15	7	7	1	0	0	1	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0
AF9	Lockey House – 30 St. Peters Street	7	1	5	1	0	0	1	0	0	0	0	1	1	1	0	0	0	0	0	0	0	0
AF10	95-101A St. Peters Street	5	2	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
AF11	109-117 St Peters Street	5	4	1	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0
AF12	4A-24 Spencer Street	6	1	2	2	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0
AF13	1-13 Verulam Road	7	4	1	3	0	0	1	0	0	1	1	1	1	1	1	0	0	0	0	0	0	0
AF14	2-6 Victoria Street	3	2	1	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0
AF15	Victoria Parade & 95-143 Victoria Street	16	12	1	1	0	0	1	2	0	2	1	1	0	0	0	0	0	0	0	0	0	0
AF16	126 Victoria Street-Horn Of Plenty	3	1	0	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
AF17	145-161 Victoria Street	10	5	0	4	0	1	0	0	0	0	0	0	0	0	1	1	2	2	0	0	0	0
AF18	1-7 Waddington Road	5	3	0	2	0	0	1	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Total	152	83	27	21	3	10	10	13	7	15	20	20	19	15	13	15	14	6	5	1	0	2

*as defined by District Plan Review Policy 52

4.0 HARPENDEN TOWN CENTRE

4.1 Harpenden Town Centre is the District's second largest shopping centre. District Plan Review Policy 53 provides guidance on shopping development in Harpenden Town Centre and identifies defined shopping frontages (see paragraphs 2.2 and 2.3 above).

4.2 The town centre has two major food stores (Sainsbury's and Waitrose), a Marks and Spencer Simply Food outlet, and some national multiple retailers, including Boots, Argos and W H Smith. There is also a wide variety of speciality retailers in the town and, in recent years, there has been a significant increase in the number of restaurants and takeaways that are mainly to be found in the Secondary and Class 'A' frontages. Restaurants and takeaways add to the general vitality of Harpenden Town Centre, but it is important to ensure that such uses do not undermine its main role as a retail centre. Introduced in 2005, the Farmer's Market is now a regular event, held once a month along the service road in High Street, with around 55 stalls selling a variety of local produce. This adds to the vibrancy of the town centre and attracts visitors from out of town.

Harpenden Shopping Frontages

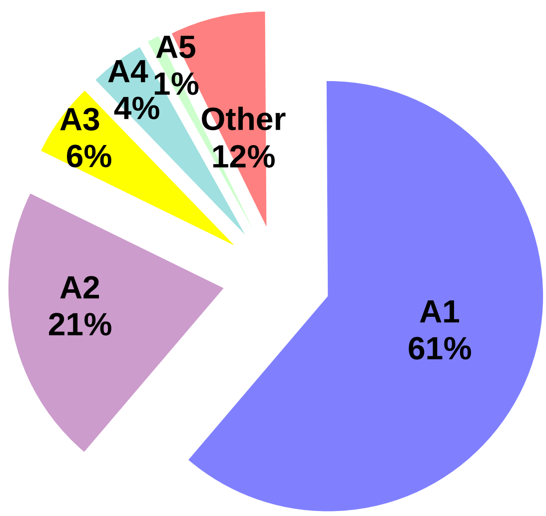
4.3 Harpenden's Primary Shopping Frontages continue to perform well. The level of A1 usage has fallen during 2009 -10 from 63% to 61%. The centre continues to attract speciality retailers which enhance the town's retail offer. PSF3 has more than 50% A2 use.

Table 6: Harpenden Town Centre PRIMARY Shopping Frontages - Existing Uses

Ref.*	Frontage	Frontage Length In Metres and Percentage													
		Total	A1	%	A2	%	A3	%	A4	%	A5	%	Other	%
PSF1	1-3 Church Green/ 2b-10 Leyton Road	89.9	77.7	86	4.7	5	4.0	4	0.0	0	0.0	0	3.5	4
PSF2	1-31 High Street	202.0	119.0	59	38.0	19	0.0	0	9.0	4	0.0	0	36.0	18
PSF3	18-50 High Street	113.6	48.1	42	61.0	54	0.0	0	0.0	0	4.5	4	0.0	0
PSF4	The Leys	57.0	48.5	85	2.5	4	0.0	0	0.0	0	0.0	0	6.0	11
PSF5	1-11 Leyton Road/ 12-18 Church Green Row	139.0	129.7	93	9.3	7	0.0	0	0.0	0	0.0	0	0.0	0
PSF6	2-16 High Street & 1-3 Leyton Green Road	133.0	25.0	19	39.5	30	37.0	28	23.0	17	0.0	0	8.5	6
	Total	734.5	448.0	61	155.0	21	41.0	6	32.0	4	4.5	1	54.0	7

* as defined by District Plan Review Policy 53

Harpenden Primary Frontages – Existing Uses



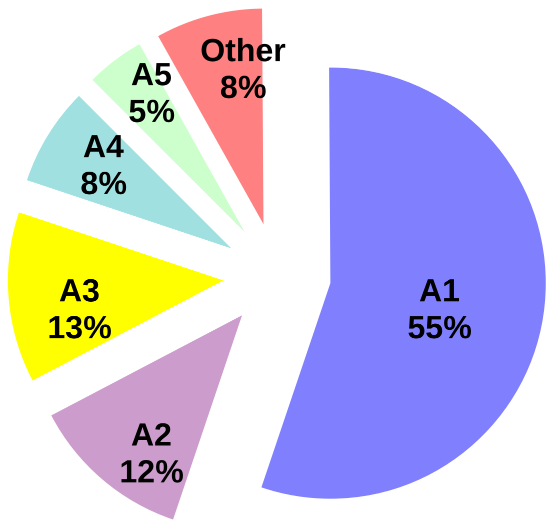
4.4 The Secondary Shopping Frontages are also performing well. A1 units here account for 55% of the frontage.

Table 7 Harpenden Town Centre SECONDARY Frontages - Existing Uses

Ref.*	Frontage	No of Units	Frontage Length In Metres And As Percentage													
			Total	A1	%	A2	%	A3	%	A4	%	A5	%	Other	%
SSF1	4-6 Church Green & 52-104 High Street	28	213.0	89.2	42	0.0	0	30.5	14	35.0	16	17.3	8	41.0	19
SSF2	33-61 High Street	25	159.3	102.5	64	22.6	14	14.5	9	11.7	7	0.0	0	8.0	5
SSF3	12-14 Leyton Road	2	13.0	13.0	100	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0
SSF4	2a-34 Station Road	19	138.2	55.5	40	50.2	36	26.5	19	0.0	0	6.0	0	0.0	0
SSF5	1-17a Station Road	10	94.9	80.5	85	2.8	3	6.8	7	0.0	0	4.8	5	0.0	0
	Total	84	618.4	340.7	55	75.6	12	78.3	13	46.7	8	28.1	5	49.0	8

* as defined by District Plan Review Policy 53

Harpenden Secondary Frontages – Existing Uses



4.5 The vacancy level in Harpenden town centre is low (4.6%), with 167 units occupied out of a possible 175. (see Tables 8-10).

Table 8 Harpenden Town Centre PRIMARY Shopping Frontages - Vacant Units

Ref*	Frontage	No of Units	Vacant Units										
			2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
PSF1	1-3 Church Green /2b-10 Leyton Road	13	1	0	0	1	1	1	3	1	0	1	1
PSF2	1-31 High Street	18	0	1	3	0	0	0	0	1	1	0	0
PSF3	18-50 High Street	15	0	0	0	0	1	0	1	0	0	0	0
PSF4	The Leys	3	0	0	0	0	1	0	0	1	1	1	2
PSF5	1-11 Leyton Road /12-18 Church Green Row	7	0	0	0	1	0	0	0	0	0	0	0
PSF6	2-16 High Street & 1-3 Leyton Green Road	9	0	0	0	0	0	0	0	0	0	1	0
	Total	65	1	1	3	2	3	1	4	3	2	3	3

2010 Vacant Units by Use Class

Ref*	Frontage	No of Units	A1	A2	A3	A4	A5
PSF1	1-3 Church Green /2b-10 Leyton Road	13	1	0	0	0	0
PSF2	1-31 High Street	18	0	0	0	0	0
PSF3	18-50 High Street	15	0	0	0	0	0
PSF4	The Leys	3	2	0	0	0	0
PSF5	1-11 Leyton Road /12-18 Church Green Row	7	0	0	0	0	0
PSF6	2-16 High Street & 1-3 Leyton Green Road	9	0	0	0	0	0

Table 9 Harpenden Town Centre SECONDARY Frontages - Vacant Units

Ref*	Frontage	No of Units	Vacant Units										
			2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
SSF1	4-6 Church Green & 52-104 High Street	28	0	1	0	0	0	0	0	0	0	0	0
SSF2	33-61 High Street	25	0	0	0	0	0	0	0	1	1	3	2
SSF3	12-14 Leyton Road	2	0	0	0	0	0	0	0	0	0	0	0
SSF4	2a-34 Station Road	20	0	0	0	3	3	2	1	0	1	1	1
SSF5	1-17a Station Road	10	0	2	0	0	0	1	1	0	1	0	0
	Total	85	0	3	0	3	3	3	2	1	3	4	3

2010 Vacant Units by Use Class

Ref*	Frontage	No of Units	A1	A2	A3	A4	A5
SSF1	4-6 Church Green & 52-104 High Street	28	0	0	0	0	0
SSF2	33-61 High Street	25	1	1	0	0	0
SSF3	12-14 Leyton Road	2	0	0	0	0	0
SSF4	2a-34 Station Road	20	1	0	0	0	0
SSF5	1-17a Station Road	10	0	0	0	0	0
	Total	85	2	1	0	0	0

* as defined by District Plan Review Policy 53

Table 10: Harpenden Town Centre CLASS A Frontages

Ref*	Frontage	No of Units	Vacant Units										
			2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
AF1	65-73 High Street	7	0	0	0	0	0	1	1	0	0	0	1
AF2	1-12 Harding Parade	10	0	0	0	0	0	0	0	0	0	0	1
AF3	1A-3 & 2-4 Vaughan Road and 1-3 Clayton House	9	0	0	0	0	2	2	0	0	0	0	0
	Total	26	0	0	0	0	2	3	1	0	0	0	2

2010 Vacant Units by Use Class

Ref*	Frontage	No of Units	A1	A2	A3	A4	A5
AF1	65-73 High Street	7	0	0	1	0	0
AF2	1-12 Harding Parade	10	1	0	0	0	0
AF3	1A-3 & 2-4 Vaughan Road and 1-3 Clayton House	9	0	0	0	0	0
	Total	26	1	0	1	0	0

* as defined by District Plan Review Policy 53

4.3 The main conclusions in the retail study update 2009 with regard to Harpenden are summarised below:

- By 2016, there will be a quantitative need for a net additional 2,900 sq metres of convenience goods floorspace in Harpenden;

- The quantitative need calculation supports an additional foodstore floorspace in Harpenden, and this need may be met by extensions to the existing modestly sized foodstores in the town centre;

- By 2016, there is a quantitative need for a net additional 1,600 sq metres of comparison goods floorspace in the Harpenden sub-area;

- For Harpenden, the comparison floorspace need is modest and it reflects the more limited comparison goods offer in the Harpenden zone.

5.0 MAJOR RETAIL DEVELOPMENT OUTSIDE EXISTING TOWN CENTRES

5.1 Existing and proposed developments in St Albans District are set out below. The Griffiths Way and Barnet Road sites are referred to in Policy 58 of the District Local Plan.

(i) Alban Park/Acrewood Way, Hatfield Road, St Albans

There are four retail warehouses:

Focus (currently vacant), Alban Park 2,952 sq m (gross)
Homebase, Alban Park 3,450 sq m (gross)
Wickes, Acrewood Way 2,787 sq m (gross)
Hi-Spek Electronics, Acrewood Way 553 sq m (net sales)

The former Focus site has a pending planning application submitted by Dunelm Mill to increase the floorspace with a mezzanine level.

(ii) Griffiths Way, St Albans (former Gas Works Site)

This development comprises a Sainsbury's superstore (6,402 sq m gross), a non-food retail development (Abbey View Retail Park - 6,504 sq m gross) and a Homebase store which has been extended and divided to include an Argos store (7,580 sq m gross).

Abbey View Retail Park consists of four non-food retail units and one A5 restaurant:

Halfords
Matalan
Carpetright
Currys
McDonalds

An application has been submitted to redevelop this site, increasing the retail warehousing floorspace.

The Emerging Core Strategy 2009 considered whether the Abbey View Retail Park might be extended onto the Gas Holders Site to provide additional retail warehouse development.

(iii) Colney Fields, London Colney

Since the approval of the Savacentre development in the late 1980s, Colney Fields has developed into a major out-of-centre shopping complex. Colney Fields now consists of:

Sainsbury's (11,066 sq metres gross, 8,042 sq metres net)
Marks and Spencer (8,593 sq metres net)
Five non-food retail units (9,095 sq metres retail purposes)

The five non-food retail units were completed in 2005. They are situated at the eastern end of the car park and are occupied by Next, Boots, Sports World, Monsoon/Accessorize and New Look.

5.2 Colney Fields (London Colney) is a retail park with extensive retail floorspace, but it lacks service and other uses. Therefore, it does not have a formal designation within the hierarchy of centres, so there is no policy support for future expansion of this out-of-town facility.

The Emerging Core Strategy 2009 considered whether the retail park might be extended onto the Ridgeview Site to provide additional retail development.

6.0 MAJOR FOOD STORES IN ST ALBANS DISTRICT

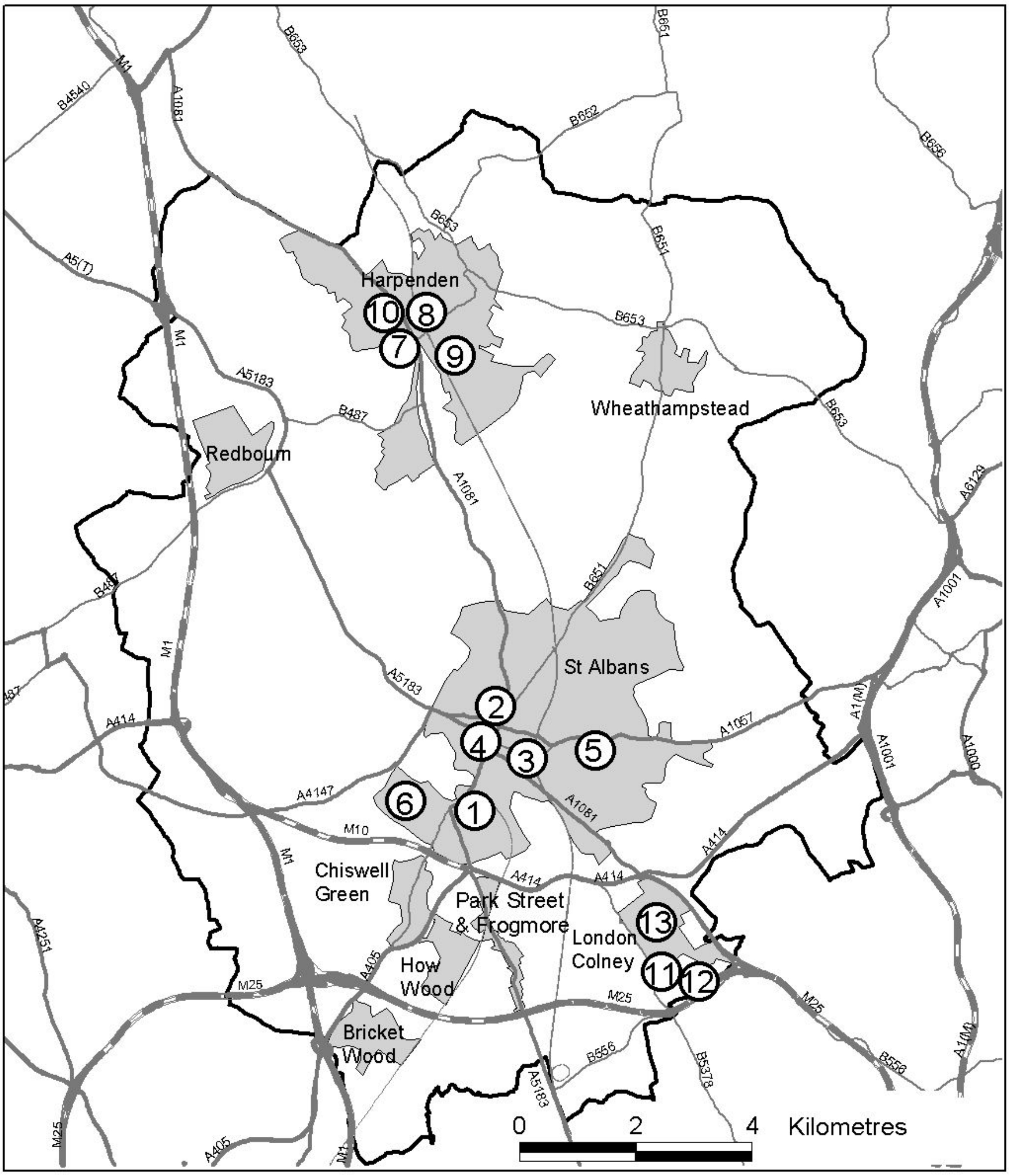
6.1 The major food stores in the District are listed below and their locations are shown on Map 1.

6.2 During 2009-2010 Tesco Metro relocated their store to the larger and more central former Woolworths site. An application has been submitted to extend the Sainsburys Store in Everard Close.

St Albans	**Gross floorspace**	**Net floorspace**
Sainsbury's, Everard Close	6,402 sq m	4,226 sq m
Tesco Metro, St Peter's Street	1,954 sq m	946 sq m
Iceland, Victoria Street	1,133 sq m	608 sq m
Marks & Spencer, St Peter's Street	N/A	743 sq m*
Morrisons Hatfield Road, Fleetville	6,174 sq m	3,406 sq m
Waitrose, Verulam Estate	3,627 sq m	2,185 sq m
Harpenden		
Waitrose, 3-7 Leyton Road	2,415 sq m	1,207 sq m
Sainsbury's, High Street	4,490 sq m	2,083 sq m
Somerfield, Southdown Road	3,000 sq m	1,240 sq m
Marks and Spencer Simply Food	N/A	466 sq m
London Colney		
Sainsbury's, Barnet Road	11,066 sq m	8,042 sq m
Marks and Spencer, Barnet Road	N/A	1,161 sq m*
Co-op, Haseldine Road	1,023 sq m	650 sq m

*Food element of store only

MAP 1 MAJOR FOOD STORES IN ST ALBANS DISTRICT



ST ALBANS	HARPENDEN	LONDON COLNEY
1 SAINSBURY'S, GRIFFITHS WAY	7 WAITROSE, LEYTON ROAD	11 SAINSBURY'S, BARNET ROAD
2 TESCO METRO, ST PETERS STREET	8 SAINSBURY'S, HIGH STREET	12 MARKS AND SPENCER, BARNET ROAD
3 ICELAND, VICTORIA STREET	9 SOMERFIELD, SOUTHDOWN	13 CO-OP, HASELDINE ROAD
4 MARKS AND SPENCER, ST PETERS STREET	10 MARKS AND SPENCER SIMPLY FOOD, LEYTON GREEN	
5 MORRISONS, HATFIELD ROAD, FLEETVILLE		
6 WAITROSE, VERULAM ESTATE		

N

7.0 NEIGHBOURHOOD CENTRES

7.1 There are seven neighbourhood centres located across the District. These centres meet the needs of the local population, particularly in terms of food retailing and are home to a wide variety of comparison shops and speciality shops. Wheathampstead has a monthly Farmers Market selling local produce. Other commercial and community uses are important in these centres, but it is the retail activity that underpins their vitality and viability.

7.2 District Plan Review Policy 54 provides guidance on shopping development in the neighbourhood centres and the policy defines Primary Shopping Frontages and Class 'A' Frontages in each. (Paragraph 2.3 above explains the Council's approach towards the loss of retail floorspace and the location of service uses in defined shopping frontages).

7.3 Little has changed in the neighbourhood centres. Vacancies have fallen over the last 12 months from 24 to 21. The vacancy rate is currently 8%. London Colney has only one vacant unit and, although well below the 90% requirement, the percentage of Primary frontage in A1 use remains at 67% (see Table 12). As highlighted in previous monitoring reports, pressure continues in the neighbourhood centres for conversion of existing retail units to other competing uses, particularly residential uses. Such trends need to be carefully monitored to ensure that these centres continue to retain their primary function in meeting the retail needs of the local population.

Table 11: Neighbourhood Centres - Vacant Units

Ref*	Frontage	No of Units	Vacant Units										
			2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
NC1	Southdown	37	1	1	2	1	1	1	1	1	1	4	4
NC2	Redbourn	27	3	3	3	4	4	4	4	4	3	4	3
NC3	Wheathampstead	29	5	7	5	4	3	1	3	3	6	4	5
NC4	Verulam Estate	2	0	0	1	1	2	2	0	0	0	0	0
NC5	Fleetville	103	9	8	4	8	9	9	10	8	5	9	6
NC6	The Quadrant, Marshalswick	40	0	1	1	2	0	0	0	0	1	3	2
NC7	London Colney	26	3	3	0	0	3	3	1	1	0	0	1
	Total	264	21	23	16	20	22	20	19	17	16	24	21

2010 Vacant Units by Use Class

Ref*	Frontage	No of Units	A1	A2	A3	A4	A5
NC1	Southdown	37	3	0	0	0	0
NC2	Redbourn	27	3	0	0	0	0
NC3	Wheathampstead	29	4	0	0	0	1
NC4**	Verulam Estate	2	0	0	0	0	0
NC5	Fleetville	103	4	0	0	0	2
NC6	The Quadrant, Marshalswick	40	1	1	0	0	0
NC7	London Colney	26	0	1	0	0	0
	Total	264	15	2	0	0	3

*as defined by District Plan Review Policy 54
** Was 5 units until extension to Waitrose store during 2005

7.4 The Quadrant and Fleetville in St Albans, and Southdown in Harpenden, consistently perform well. Fleetville has only 6 vacant units out of a possible 103 and has a good range of small, independent retail outlets. Wheathampstead has the worst performing neighbourhood centre with a vacancy rate of 17%. The Class 'A' frontages also retain a high proportion of A1 uses (See Tables 12 and 13).

Table 12: Neighbourhood Centres PRIMARY Frontages – Existing Uses

Ref*	Neighbourhood Centre	Length Of Frontage In Metres & Percentage													
		Total	A1	%	A2	%	A3	%	A4	%	A5	%	Other	%
NC1	Southdown	200.1	133.1	67	8.5	4	5.5	3	0.0	0	15.2	8	37.8	19
NC2	Redbourn	34.0	23.0	68	0.0	0	0.0	0	0.0	0	0.0	0	11.0	32
NC3	Wheathampstead	206.7	109.2	53	23.6	11	11.8	6	0.0	0	8.9	4	53.2	26
NC4	Verulam Estate	50.9	50.9	100	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0
NC5	Fleetville	164.0	149.0	91	0.0	0	5.0	3	0.0	0	4.0	2	6.0	4
NC6	The Quadrant, Marshalswick	105.0	95.0	90	5.0	5	0.0	0	0.0	0	5.0	5	0.0	0
NC7	London Colney	107.0	72.0	67	15.0	14	0.0	0	0.0	0	5.0	5	15.0	14
	Total	867.7	632.2	73	52.1	6	22.3	3	0.0	0	38.1	4	123.0	14

* as defined by District Plan Review Policy 54

Neighbourhood Centres Primary Frontages – Existing Uses

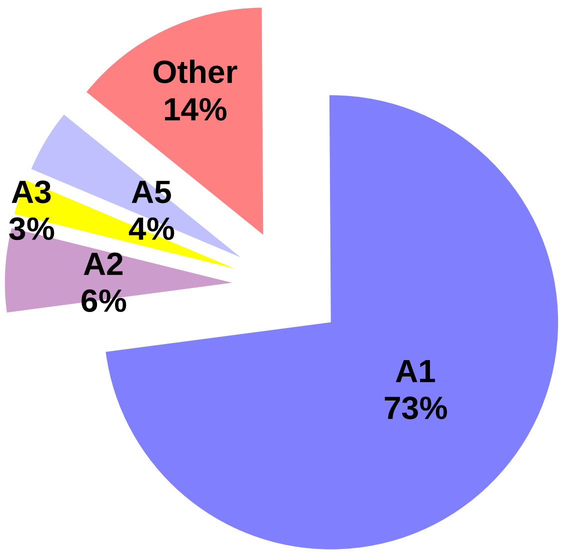


Table 13: Neighbourhood Centres CLASS A Frontages

REF*	NEIGHBOURHOOD CENTRE	TOTAL CLASS 'A' UNITS	CLASS 'A' FRONTAGES				
			A1 Units	A2 Units	A3 Units	A4 Units	A5 Units
NC1	Southdown	8	6	1	1	0	0
NC2	Redbourn	21	14	2	2	1	1
NC3	Wheathampstead	5	4	0	1	0	0
NC4	Verulam Estate	0	No Class 'A' Frontage				
NC5	Fleetville	82	48	9	9	2	14
NC6	The Quadrant, Marshalswick	20	11	5	1	0	3
NC7	London Colney	10	6	1	1	1	1
	Total	146	89	18	15	4	19

*as defined by District Plan Review Policy 54

7.6 The audit of the District's Neighbourhood Centres in the Retail Study Update 2009 confirmed that overall they generally have a good mix of convenience, comparison and service businesses. This offer is supplemented in most cases by a range of other health and communities facilities, including libraries, doctor surgeries, churches, youth centres, etc.

8.0 LOCAL CENTRES

8.1 There are now twenty six local shopping centres located throughout the District. They serve the residential areas of the major settlements and the villages. These centres provide basic shopping facilities and services for the local population and are vital for people who do not have easy access to the supermarkets and food superstores where the majority of people shop on a regular basis. Local centres can also provide a focal point for communities.

8.2 District Plan Review Policy 55 provides guidance on shopping development in the local centres. Policies 56 and 57 allow for changes of use from retail to service uses in such centres provided '*sufficient shops remain to cater for the daily needs of the local population'*.

8.3 The newest local centre is at Hill End, St Albans, which was completed in 2005. It includes a doctor's surgery and 4 retail units.

8.4 Despite the difficult economic situation during the past year, vacancies in local centres have altered very little (Table 14) and all have good occupancy rates. Sixteen of the twenty six Local Centres are fully occupied. The vacancy rate stands at 7.1%. Many of these centres are still able to provide for basic needs, but they face considerable competition from supermarkets, superstores and more recently from petrol filling stations, which sell a wide range of convenience goods.

8.5 Over recent years there has been an increase in retail and other uses within local centres which meet district-wide rather than local needs (for example, computer stores or sports injury clinics). There is also continued pressure for units to convert to residential uses, especially in some of the worst performing local centres. Despite the new residential development at the adjacent Napsbury Park, No. 5 Shenley Lane (LC19) has been vacant since 2001 and planning permission exists for a change of use from A1 to residential.

Table 14: Local Centres

REF.*	FRONTAGE	NO. OF UNITS						VACANT UNITS										
		Total	A1	A2	A3	A4	A5	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
LC1	8-26 High Oaks Road	10	7	0	0	0	2	3	3	2	0	1	0	0	0	0	0	0
LC2	35-41a Abbey Avenue, St Albans	5	4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
LC3	23-29a Vesta Avenue & Watling Avenue, St Albans	11	5	0	1	0	2	0	0	0	0	1	1	0	2	2	0	0
LC4	28-30 Abbots Avenue West, St. Albans	5	5	0	0	0	0	2	4	3	2	2	4	4	3	1	1	1
LC5	St. Brelades Place, Jersey Farm, St Albans	7	5	0	1	0	1	0	0	0	0	1	1	0	0	0	0	0
LC6	2-36 Beech Road, St Albans	11	7	0	0	0	2	0	0	0	0	0	0	0	0	1	1	2
LC7	19-23 & 40-42 Sandridge Road, St Albans	3	1	0	0	0	0	0	0	0	0	1	1	0	0	0	0	0
LC8	15-23 Central Drive, St Albans	5	4	0	0	0	0	1	0	0	0	1	0	0	1	1	1	2
LC9	38-52 Newhouse Park	8	3	1	0	0	3	1	0	0	0	0	0	0	0	1	1	1
LC10	399-421 & 444 Hatfield Road, St Albans	12	10	0	1	0	1	0	1	1	1	0	0	1	0	2	1	1
LC11	211-217 & 243-249 Camp Road St Albans	2	2	0	0	0	0	1	1	1	1	1	1	1	0	0	0	0
LC12	191-205 Cell Barnes Lane, St Albans	7	6	0	0	0	0	0	0	0	0	1	1	0	0	0	0	0
LC13	60, 61 & 63 Russet Drive, Hill End, St Albans	5	3	0	1	0	0	NA	NA	NA	NA	NA	NA	2	1	0	0	0
LC14	381-397 Luton Road, Harpenden, St Albans	5	3	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1
LC15	95-105 Luton Road Harpenden, St Albans	6	5	0	0	0	0	0	0	0	0	0	1	0	1	0	0	0
LC16	50-54 Westfield Road, Harpenden	3	3	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0
LC17	121-125 & 138-146 Lower Luton Road, Harpenden	4	3	0	0	0	1	1	2	1	0	0	0	0	0	0	0	0
LC18	103-107 Station Road, Harpenden	3	3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
LC19	1-5 Shenley Lane, London Colney	3	1	0	1	0	1	1	2	2	2	2	2	1	1	1	1	1
LC20	81-97 Old Watford Road, Bricket Wood	6	3	0	0	0	2	0	0	0	0	0	1	1	1	0	0	1
LC21	95-127 Oakwood Road, Bricket Wood	9	8	1	0	0	0	0	1	0	0	1	1	1	1	1	1	1
LC22	19-27 Blackboy Wood, Bricket Wood	2	2	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0
LC23	2A Tippendell Lane & 301-305, 337 & 192-204 Watford Road, Chiswell Green	10	7	1	0	0	2	0	0	0	0	0	0	0	0	0	0	1
LC24	2-30 How Wood, How Wood	13	10	1	0	0	2	1	1	2	0	0	0	0	0	1	0	0
LC25	69-71 & 68-76 & land south of 84 Park Street, 1-2 Park Street Lane, Park Street	9	3	0	0	1	1	2	0	0	0	1	0	0	0	1	1	0
LC26	15 & 8-116 High Street, Colney Heath	5	2	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0
	TOTALS	**169**	**115**	**4**	**5**	**1**	**21**	**14**	**15**	**12**	**7**	**13**	**14**	**12**	**12**	**13**	**9**	**12**

*as defined by District Plan Review Policy 55

2010 Vacant Units by Use Class

REF.*	FRONTAGE	No of Units	VACANT 2010				
			A1	A2	A3	A4	A5
LC1	8-26 High Oaks Road	10	0	0	0	0	0
LC2	35-41a Abbey Avenue, St Albans	5	0	0	0	0	0
LC3	23-29a Vesta Avenue & Watling Avenue, St Albans	11	0	0	0	0	0
LC4	28-30 Abbots Avenue West, St. Albans	5	1	0	0	0	0
LC5	St. Brelades Place, Jersey Farm, St Albans	7	0	0	0	0	0
LC6	2-36 Beech Road, St Albans	11	2	0	0	0	0
LC7	19-23 & 40-42 Sandridge Road, St Albans	3	0	0	0	0	0
LC8	15-23 Central Drive, St Albans	5	1	0	0	0	0
LC9	38-52 Newhouse Park	8	1	0	0	0	0
LC10	399-421 & 444 Hatfield Road, St Albans	12	1	0	0	0	0
LC11	211-217 & 243-249 Camp Road St Albans	2	0	0	0	0	0
LC12	191-205 Cell Barnes Lane, St Albans	7	0	0	0	0	0
LC13	60, 61 & 63 Russet Drive, Hill End, St Albans	5	0	0	0	0	0
LC14	381-397 Luton Road, Harpenden, St Albans	5	1	0	0	0	0
LC15	95-105 Luton Road Harpenden, St Albans	6	0	0	0	0	0
LC16	50-54 Westfield Road, Harpenden	3	0	0	0	0	0
LC17	121-125 & 138-146 Lower Luton Road, Harpenden	4	0	0	0	0	0
LC18	103-107 Station Road, Harpenden	3	0	0	0	0	0
LC19	1-5 Shenley Lane, London Colney	3	1	0	0	0	0
LC20	81-97 Old Watford Road, Bricket Wood	6	0	0	0	0	0
LC21	95-127 Oakwood Road, Bricket Wood	9	1	0	0	0	0
LC22	19-27 Blackboy Wood, Bricket Wood	2	0	0	0	0	0
LC23	2A Tippendell Lane & 301-305, 337 & 192-204 Watford Road, Chiswell Green	10	1	0	0	0	0
LC24	2-30 How Wood, How Wood	13	0	0	0	0	0
LC25	69-71 & 68-76 & land south of 84 Park Street, 1-2 Park Street Lane, Park Street	9	0	0	0	0	0
LC26	15 & 8-116 High Street, Colney Heath	5	0	0	0	0	0
	TOTALS	**169**	**10**	**0**	**0**	**0**	**0**

9. 0 KEY TRENDS

9.1 There has been no appreciable change in vacancy rates during the recession. Vacancy rates in most of the District are well below the national average.

9.2 Monitoring information for 2010 indicates that vacant units are slightly less than 2009. Within the primary frontages in St Albans City, 193 units are occupied out of a possible 202 giving a vacancy rate of only 4%. Secondary Frontages, have 93 out of 101 units occupied, a vacancy rate of 8%. Class 'A' frontages have 14 (one less than last year) vacancies out of a possible 153 (9%) .

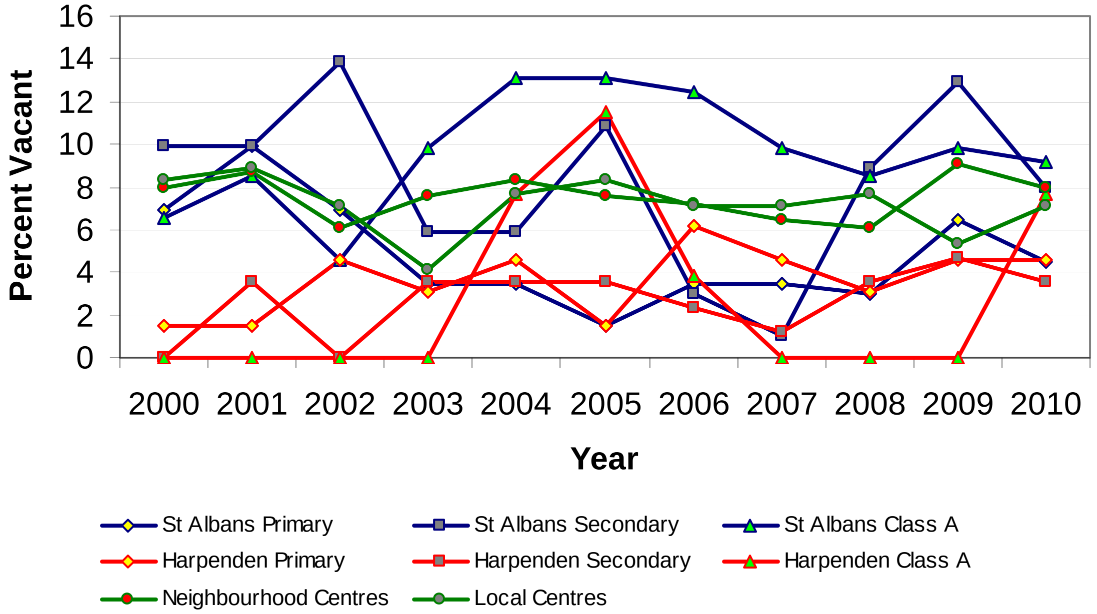
9.3 Harpenden also remains a strong retail centre, with a wide variety of specialist shops, a number of national multiples and very low vacancy rates in all types of retail frontage. Whilst there have been no significant changes since 2001, the proportion of A3 units in the town's secondary and Class 'A' frontages will need to be carefully monitored to ensure that an appropriate balance of uses is maintained.

9.4 Notwithstanding the strengths highlighted above, it is important to bear in mind that the retail sector is extremely dynamic and reactive to customer demand. Continual improvements therefore need to be made if St Albans is to retain its vitality and viability and effectively compete with its neighbouring towns, in order to remain a strong, distinctive shopping destination in its own right.

9.5 Vacancies in neighbourhood and local centres have remained consistently steady since 2000, with only very small fluctuations. London Colney has only one vacancy but the low proportion of A1 units here is of concern.

9.6 The chart below shows the percentage of vacant units over time in each type of frontage. It can be seen that local and neighbourhood centres vary very little, whilst primary, secondary and class A frontages are more reactive to market forces. Harpenden has lower vacancy rates than St Albans.

Vacant Units 2000-2010



9.7 The Retail Study Update 2009 sets out specific quantitative and qualitative retail deficiencies within the St Albans District, which need to be addressed in the forthcoming Development Plan Documents (particularly the Core Strategy and Site Allocations DPD). Conclusions reached in the study include:

- The economic assessment has provided a broad overview of the potential need for new convenience and comparison goods floorspace over the short term (up to 2011) and medium term (up to 2016), with longer term forecasts up to 2026 and 2031.

- There is economic capacity for major new comparison goods floorspace in St Albans City Centre over the short to medium term. A number of potential sequential sites have been identified that could accommodate the forecast capacity up to 2016.

- The qualitative (health check) assessment indicates that Harpenden is a vital and viable town centre. It is performing well in terms of a number of key performance indicators. In our judgement the further loss of Class A1 retail floorspace and particularly one or more of the centre's major multiple retailers could undermine Harpenden's overall attraction and performance, and harm the centre's vitality and viability.

- The audit of the District's Neighbourhood Centres confirmed that overall they generally have a good mix of convenience, comparison and service businesses. This offer is supplemented in most cases by a range of other health and community facilities, including libraries, doctor surgeries, churches, youth centres, etc.

- Local shopping parades are broadly defined as small clusters of shops, generally comprising three or more Class A1 units. Government guidance defines small parades of shops as having a purely neighbourhood significance. Nevertheless, the smaller shopping parades and clusters of shops have an important function and role in the District's network of shopping.

- St Albans has a good provision of out-of-centre foodstores and large format retail warehouse operators, particularly in the St Albans area (Zone 1) to the south of the District. In policy terms any identified need for new comparison and convenience goods floorspace should be directed to town centre and edge-of-centre sites in the first instance.

9.8 No major retail developments have been completed in the District during the last year (see Appendix 1) but the Tesco Metro store relocated to a larger and more central site in St Peters Street. Applications have been received to extend the Sainsbury's store in Everard Close and to redevelop the Abbey View Retail Park. Both applications will increase floorspace. Additional floorspace will be created at Alban Park if the application to extend the former Focus site with a mezzanine level is granted.

9.9 The Emerging Core Strategy 2009 sets out proposals for comparison and convenience retailing. The main issues can be summarised as follows:

Emerging strategy 2009 comparison retailing

- St Albans city centre - The Council's main priority is to secure a retail led mixed use development scheme. This should be located one of the following locations or possibly both in the long term:
  SH1: West of St Peter's Street (Drovers Way)
  SH2: East of St Peter's Street (Civic Centre).

The development should include space for larger chain stores, smaller specialist retailers and possibly a department store.

- Harpenden town centre - No substantial non-food shopping development is proposed, particularly given the low assessed ‘need’.

- Griffiths Way (gas works site), St Albans - The gas holder site has potential for more retail warehousing development. The Council will reach a decision on this possibility at the Core Strategy Pre-submission stage.

- Colney Fields, London Colney - The Council will give consideration to using the Ridgeview site to extend the retail park and will reach a decision on this at the Pre-submission stage.

Emerging strategy 2009 convenience retailing

- St Albans city centre - The Council’s main priority is to secure a superstore or large supermarket in the city centre. This should be located in one of the following locations possibly as part of a larger retail led mixed use scheme:
  FS4: West of St Peter’s Street (Drovers Way)
  FS5: East of St Peter’s Street (Civic Centre),
  A decision on location will be included in the Core Strategy Pre-submission document, informed by the St Albans City Vision master planning stage.

- St Albans out-of-centre - The Core Strategy will not propose an out-of-centre superstore unless it becomes clear at the Pre-submission stage that a city centre site cannot be brought forward. Also, sites north of the city centre are favoured as there are no superstores at present. Sites FS2 (Harpenden Road, fire station site) and FS3 (Harpenden Road, rear of Texaco filling station) should be considered further if required in the long term.

- Harpenden - Town Centre FS6: Extension of the existing supermarkets is acceptable in principle. Southdown FS7: Extension of the existing supermarket is acceptable in principle, or possibly a replacement supermarket in Grove Road.

- Harpenden out-of-centre - Much of the town centre’s strength comes from its food shopping. An out of- centre superstore is not favoured, because of the likely harm to the town centre’s vitality and viability.

APPENDIX 1
COMPLETED DEVELOPMENTS IN ALLOCATED RETAIL FRONTAGES AND EDGE OF TOWN/OUT OF TOWN CENTRES
1 APRIL 2009 – 31 MARCH 2010

Local Plan Ref	Planning Ref	Address	Proposal
St Albans			
PSF2	09/0457	14 Chequer Street	Change of use from Class A1 (retail) to Sui Generis (beauty salon)
PSF7	09/0699	47 The Maltings	Replacement shop front at St Albans
PSF7	09/1445	45 The Maltings	Replacement shopfront (retrospective)
PSF8	09/1033	21 Market Place	Internal alterations to existing building, replacement shopfront
SSF1	10/0482	39 Catherine Street	Change of use from Class A1 (retail) to Class A3 (cafe)
SSF7	09/0080	8 Holywell Hill	Change of use from Class A1 (retail) to Class A2 (financial and professional services)
SSF8	09/1435	3b London Road	Change of use from Class A2 (financial services) to Sui Generis (photographic studio)
AF6	09/2448	92 London Road	Change of use from Class A1 (retail) to Class A2 (letting agents)
AF13	09/1184	3-5 The Colonnade Verulam Road	Alterations to shopfront to include hard wood panelling and alterations to openings (retrospective)
Harpenden			
SSF4	09/0954	14 Station Road	Alterations to shopfront & division of retail space into 2 units
Neighbourhood Centre			
NC1	08/2723	126 Southdown Road Harpenden	Change of use from Class A1 (retail) to Class A2 (financial and professional services)
NC5	08/2705	66-68 Stanhope Road Porters Wood St Albans	Amalgamation of numbers 66 and 68 to form one unit and change of use from Class A1 (retail) to Class A3 (restaurant)
NC5	10/0141	66-68 Stanhope Road St Albans	New shopfront
NC5	07/2378	167 Hatfield Road Fleetville	Change of use from A1 to A3
NC5	09/0972	1 Novus House 181 Hatfield Road	Change of use to Class C3 (residential)
NC5	08/1589	171a Hatfield Road St Albans	Part conversion of ground floor from Class A1 (retail) to one self contained flat
Local Centre			
LC10	10/0118	415 Hatfield Road	change of use from shop to restaurant

PERMISSIONS OUTSTANDING OR UNDER CONSTRUCTION IN ALLOCATED RETAIL FRONTAGES AND EDGE OF TOWN/OUT OF TOWN CENTRES 31st MARCH 2010

Local Plan Ref	Planning Ref	Address	Proposal	Position at 31.03.2010
St Albans				
PSF2	08/1654	The Bell Hotel 22 Chequer Street	Demolition of conservatory and podium reducing size of existing public house, alterations to openings and erection of a single storey replacement wing and part change of use to provide three retail units (Class A1)	Not started
PSF2	08/2104	30 Chequer Street	Certificate of Lawfulness (proposed) - Use as hair and beauty salon (Class A1)	Not started
PSF3	07/2956	Land Adj 2 Christopher Place	Change of use of external storage area to Class A3 (cafe)	Not started
PSF6	07/2060	26a & 26b George Street	Alterations to form single shop unit	Not started
AF1	07/2247	45 Catherine Street	Change of use from A1 to A2	Not started
AF6	07/1615	156 London Road	Change of use from A3 to A5	Not started
AF6	09/1451	144 London Road	Change of use from A1 (offlicence/ newsagents) to Class A3/A5 (restaurant / takeaway)	Not started
Harpenden				
PSF2	09/1467	1 High Street	Replacement shopfront and handrails	Not started
SF2	08/0229	49 High Street	Change of use from Class A1 (hairdressers) to Class A2 (estate agents)	Not started
Neighbourhood Centre				
NC1	08/2541	126 Southdown Road Harpenden	COU of part ground floor and all of first floor from Class A1 (retail) to Class C3 (residential) with alterations to openings	Not started
NC2	09/2243	50 High Street Redbourn	Change of use of ground floor from Class A1 (retail) to Class A3 (cafe)	Not started
NC3	09/2214	29 High Street Wheathampstead	Change of use from Class A2 (financial and professional services) to Class B1 (business use)	Not started
NC3	08/0796	19-21 High Street Wheathampstead	Change of use of 19 High Street from Class B1 (office) to Class A1 (retail) and amalgamation of Nos 19 and 21 High Street to form one retail unit	Not started
NC3	08/0797	19-21 High Street Wheathampstead	Alterations to shopfront	Not started
NC3	08/1330	32-34 High Street Wheathampstead	Change of use of part of ground floor from Class A1 (retail) to Class C3 (residential) to form new ground floor entrance to first floor flat, new shopfront to No. 32, new windows and doors to ground floor	Not started
NC5	09/1399	193 Hatfield Road St Albans	Change of use from Class A1 (retail) to a mixed use of Class A1 (retail) and Class A3 (restaurant/cafe)	Not started

Local Plan Ref	Planning Ref	Address	Proposal	Position at 31.03.2010
NC5	09/2289	63 Hatfield Road St Albans	Change of use from Class A1 (retail) to A3 (restaurant)	Not started
NC6	10/0270	23 The Quadrant St Albans	Installation of new shopfront	Not started
NC5	08/0076	101 Hatfield Road St Albans	Replacement shopfront	Not Started
Local Centre				
LC4	08/1903	34b Abbots Avenue West St Albans	Change of use from Class A1 (retail) to Sui Generis (laundrette)	Not started
LC6	09/2334	26-30 Beech Road St Albans	Installation of new shopfront and associated minor external alterations	Not started
LC15	09/0825	101 Luton Road Harpenden	Replacement shopfront	Not started
LC22	09/1304	19 Black Boy Wood Bricket Wood	Change of use from Class A1 (retail) to Class A3 with ancillary Class A1(coffee shop with florist)	Not started
LC25	5/2008/1858	76-78 Park Street St Albans	Alterations to shopfront	Not Started
Out of Centre				
N/A	06/2466	Focus, Alban Park Hatfield Road	Demolition of garden centre and extension of A1 retail unit	Not started
NA	08/2813	Napsbury Church Goldring Way London Colney	Demolition of existing building and erection of three storey building including three retail units	Church Demolished