



Revised Stevenage Retail Study

October 2014

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1 ADDENDUM

- 1.1 Since this Retail Study was published in April 2013 the 2011 Census figures have been released. These show that when compared to projections based on the ONS 2010 mid-year estimates, upon which the Study is based, the actual population for Stevenage Borough was 84,800 compared to 81,600.
- 1.2 In addition the ONS 2012 based projections suggest an increased population growth for Stevenage over the Plan period to 2031 has increased from 91,000 to 97,900. There has been no substantial change to the figures for North Hertfordshire, which forms part of the Study's Primary Catchment Area.
- 1.3 The CACI model used to underpin the Retail Study is not easily updated to take account of these changes largely due to alterations to the boundaries of the study's super-output areas. The following figures should therefore be only taken as being indicative of the likely effects of these population increases.

Comparison Goods

- 1.4 Based on increased population of 6,900 for the core of the catchment area and an average per capita on comparison goods in 2031 of £2,994 an additional potential available of £20.66m would be available. Utilising the figures and methodology provided by CACI, the retention rate for postcode areas SG1 and SG2 was 17.2% or £3.56m. Based on our target benchmark of £5,000/sq.m. this would amount to 712 sq m of additional space by 2031. This quantum of floorspace does not affect our recommendation at paragraph 10.8.

Convenience Goods

- 1.5 With regards to convenience floorspace, the CACI data would indicate a spend per head of approximately £2,350 in 2012 and 2,450 in 2031. On this basis the additional population would generate £7.5m of additional available expenditure in the base year and £16.9m by 2031. This results in a need for 584 sq. m in 2012 rather than the surplus recorded at paragraph 10.12 of the Report. The need increases to 7,612 sq m by 2031 compared to 6,270 sq.m. in the Report. These changes are shown on the following Chart. The effect of this is to bring forward the date by which a new major superstore should be provided by two years to 2023 with applications being entertained from 2018.

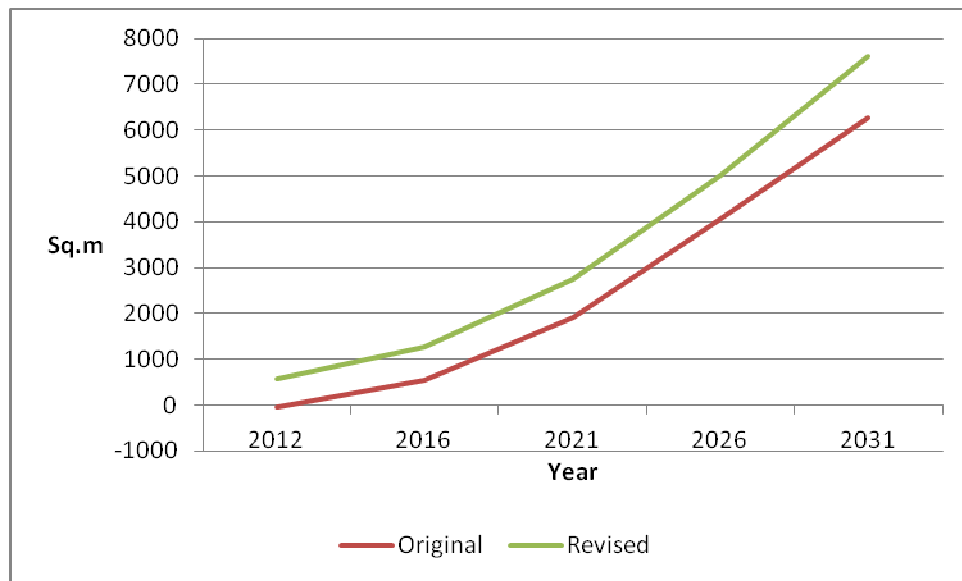


Chart showing the need for new convenience goods floorspace

2 INTRODUCTION

The Purposes of the Study

2.1 Applied Town Planning Limited (Applied Planning) and CACI were appointed by Stevenage Borough Council in October 2012 to carry out two independent but related studies. This Study is a review of the retail facilities in the town and quantifies the amount and location of new facilities that are required to meet needs in the period to 2031. In particular, the purposes of this part of the Study are to:

- Provide an objective review of the role and function of the various centres in Stevenage and identify the quantitative and qualitative needs for land and floorspace;
- Provide part of the evidence base underpinning the preparation of the Council's Local Plan and, where relevant, the plans of other authorities under the Duty to Co-operate; and
- Inform the Council's proposals for the regeneration of the Town Centre.

2.2 A second report by CACI analyses the existing retail structure of the town and identifies deficiencies in optimising the town's role as a retail centre.

The Approach

2.3 This Retail Study is underpinned by data and modelling provided by CACI. CACI's Retail Footprint Model is the most extensive and expansive retail centre catchment model for comparison goods available and is common currency for most retailers and property developers in supporting their site locations and investment decisions.

2.4 Retail Footprint is a gravity model and calculates comparison expenditure and resident shopper populations for each centre. Gravity modelling is based on four general factors, which influence the level of spatial interaction between retail centres:

- 1** Physical distance to (or time taken to reach the centre);
- 2** The 'attractiveness' of the centre's facilities;
- 3** The degree of intervening opportunities or level of competition; and
- 4** The size of the population within an area.

2.5 The Retail Footprint User Guide is included in Appendix 3 of this Study. The Guide provides a comprehensive description of the methodology underpinning the Retail Footprint model.

- 2.6 The analysis of the convenience market is provided by CACI's ProVision model. ProVision creates realistic overlapping catchments reflecting the local network, the location and the strength of competing stores. It takes account of store fascia, size, drive-time and shopper demographics to understand how attractive stores will be to customers in the area. Catchments are defined using low level census geography (Output Area).
- 2.7 The Study includes a technical assessment which adopts a transparent step-by-step methodology and considers potential retail capacity in 2012, 2013, 2016, 2021, 2026 and 2031, based on population growth and increase in expenditure per capita. The Study considers whether this growth in expenditure should be translated into new floorspace or whether it should be used to support the role and function of centres and maintain or improve the vitality and viability of the existing offer.
- 2.8 The approach includes a detail analysis of the socio-economic profile of Stevenage's catchment area and establishes the extent to which the existing offer within Stevenage's centres meet the needs and aspirations of residents. This qualitative assessment also establishes how the offer in competing centres meets the needs and aspirations of residents in Stevenage's catchment area and identifies the reasons why particular economic groups tend to shop in specific centres.
- 2.9 Having established this benchmark situation, Retail Footprint provides a 'polycentric' view of future retail capacity assessing how expenditure flows will change between Stevenage Town Centre and other neighbouring centres in light of existing commitments.
- 2.10 Finally the Study considers a 'what if' scenario and assesses how the retail offer in Stevenage could be improved to match demographic profile of the population enabling Stevenage to compete more effectively with surrounding centres and retain a greater proportion of available expenditure in the catchment.
- 2.11 In addition to Retail Footprint and ProVision models CACI have commissioned market research in to shopper's habits. This is explained in Section 4 of this Study.

An Overview of the Retail Market

- 2.12 The Study has been produced during an extended period of economic recession which has impacted heavily on the retail market with the majority of centres throughout the UK experiencing higher vacancy rates and longer void periods. The results have been well documented and publicised through reports such as that prepared by Mary Portas.
- 2.13 Many household names have disappeared altogether and many others have undergone restructuring that has led to the closure of weaker branches. Whilst these names will naturally make the headlines their effects have been felt mainly in the larger centres, it is the loss of many independent traders that has affected many smaller centres.

- 2.14 As the Centre for Retail Research reported in January 2013: *2012 has been the worst year since 2008, with more than 48,000 employees affected, almost 4,000 stores and 54 retailers. The reasons include: a second economic downturn causing weak retail sales; the failure of a few retail giants (e.g. Peacocks and Comet) which bumped up the figures for affected employees and stores; and the exiting of many companies that could survive a year or so of recession but not four years of low profits or losses. Companies affected in the last five years have included Comet, JJB Sports, Clinton Cards, Game, Borders, Barratts, Alexon, T J Hughes, Jane Norman, Habitat, Focus DIY, Floors-2-Go, the Officers Club, Oddbins, Ethel Austin, Faith Shoes, Adams Childrenswear, Thirst Quench, Stylo, Mosaic, Principles, Sofa Workshop, Allied Carpets, Viyella, Dewhursts, Woolworths, MFI, Jessops, Blockbuster, HMV and Zavvi/Virgin Megastore.*

| | Companies failing | Stores Affected | Employees Affected |
|------------------|-------------------|-----------------|--------------------|
| 2013 (to 17 Jan) | 4 | 991 | 10,720 |
| 2012 (12 months) | 54 | 3,951 | 48,142 |
| 2011 (12 months) | 31 | 2,469 | 24,025 |
| 2010 (12 months) | 26 | 944 | 10,930 |
| 2009 (12 months) | 37 | 6,536 | 26,688 |
| 2008 (12 months) | 54 | 5,793 | 74,539 |
| 2007 (12 months) | 25 | 2,600 | 14,083 |

Table 1: Retail Closures 2007-12 Source: Centre for Retail Research Jan 2013

- 2.15 It is difficult to forecast how long the recession will last but, as recessions are cyclical, economic growth will return in due course which will lead to an improved retail environment. However, the problems being experienced by many centres are not wholly related to the recession. The problems faced by retailers such as HMV and Blockbuster is largely relate to the revolution in technology that has changed the way that products such as entertainment media are purchased.
- 2.16 Competition from out-of-centre stores, particularly the larger superstores selling a wide range of comparison goods as well as groceries, and the growth of internet based retailing cannot be reversed and these changes are structural rather than cyclical.
- 2.17 Retailing is probably the most dynamic sector of the property market and a high proportion of retail expenditure is in effect 'mobile'. Shoppers often have the choice of centres and stores and will travel to the one that best meets their needs. Retailers are drawn to locations with high existing or potential expenditure flows. As demand for those centres increases so do rental levels and investment yields tighten making redevelopments more viable. The opposite is equally true with centres being at risk of a spiral of decline.

- 2.18 Change is inevitable and centres will need to evolve to meet new challenges. Centres must develop their own identity and niche markets which will widen their potential catchment area. Town centres often set the character of an area and the challenge is to ensure that town centres remain the primary focus for retail activity along with complementary services and leisure uses and that these centres are attractive to their catchment populations. In some cases this may result in less, but better quality retail floorspace with new complimentary uses, such as increased catering and leisure uses, moving into the centre.

3 PLANNING POLICY FRAMEWORK

National Planning Policy Framework

- 3.1 The National Planning Policy Framework (NPPF) was published in March 2012. It is stated at paragraph 14 that *'At the heart of the National Planning Policy Framework is a presumption in favour of sustainable development, which should be seen as a golden thread running through both plan-making and decision-taking'*.
- 3.2 NPPF states that there are three dimensions to sustainable development; an economic role, a social role and an environmental role. This Study is primarily concerned with the economic role which is defined as *'contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation; and by identifying and coordinating development requirements, including the provision of infrastructure'*.
- 3.3 Paragraphs 23-27 of NPPF set out the requirements for ensuring the vitality of town centres. The Framework states that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period.
- 3.4 NPPF advises that in drawing up Local Plans, local authorities should:
- *recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;*
 - *define a network and hierarchy of centres that is resilient to anticipated future economic changes;*
 - *define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;*
 - *promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;*
 - *retain and enhance existing markets and, where appropriate, reintroduce or create new ones, ensuring that markets remain attractive and competitive;*
 - *allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning*

authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;

- *allocate appropriate edge-of-centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge-of-centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;*
- *set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;*
- *recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and*
- *where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.*

3.5 NPPF also includes requirements for plan making. Local Plans must be underpinned by a proportionate evidence base. At paragraph 158 it is stated that '*Each local planning authority should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. Local planning authorities should ensure that their assessment of and strategies for housing, employment and other uses are integrated, and that they take full account of relevant market and economic signals*'.

3.6 Paragraph 161 states that local planning authorities should use this evidence base to assess:

- *The needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;*
- *The existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs. Reviews of land available for economic development should be undertaken at the same time as, or combined with, Strategic Housing Land Availability Assessments and should include a reappraisal of the suitability of previously allocated land;*
- *The role and function of town centres and the relationship between them, including any trends in the performance of centres;*
- *The capacity of existing centres to accommodate new town centre development;*
- *Locations of deprivation which may benefit from planned remedial action; and*
- *The needs of the food production industry and any barriers to investment that planning can resolve.*

3.7 NPPF also provides guidance on planning applications for town centre uses and states that local planning authorities should apply a sequential test to planning applications for main town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan. They should require applications for main town centre uses to be located in town centres, then in edge-of-centre locations and only if suitable sites are not available should out-of-centre sites be considered. When considering edge-of-centre and out-of-centre proposals, preference should be given to accessible sites that are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale.

3.8 Furthermore the Framework states that when assessing applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date Local Plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sq.m.). This should include assessment of:

- *The impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and*
- *The impact of the proposal on town centres vitality and viability, including local consumer choice and trade in the Town Centre and wider, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should also be assessed up to ten years from the time the application is made.*

Locally set impact thresholds for the centres in Stevenage are set out in Chapter 9.

3.9 Where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the above factors, it should be refused.

The Development Plan

3.10 The Stevenage District Plan (Second Review) was published in 2004 and was 'saved' until December 2007. The Hertfordshire Structure Plan does not contain any policies that remain 'saved' that are of relevance to this Study.

3.11 Stevenage Borough Council were preparing a draft Core Strategy based on the growth requirement of the now revoked East of England Plan which required 16,000 new homes to be built. Because of the restricted nature of the Borough's boundary half of this growth was to be accommodated within the neighbouring authority of North Hertfordshire who were working on a joint strategy with Stevenage. However following the Secretary of State's announcement of his intention to abolish Regional Plans, North Hertfordshire withdrew from these joint arrangements and subsequently Stevenage's Core Strategy was found to be 'unsound' in 2010. This decision was upheld by the High Court in December 2011.

when it was acknowledged that the Council were unable to produce a Plan that both conformed to the now revoked Regional Strategy and was 'sound'.

- 3.12 The Council is now preparing its own Local Plan and this Retail Study will form part of its evidence base. In April 2012 Stevenage Borough Council published an Interim Planning Policy Statement (IPPS) which contains policies culled from the East of England Plan and Draft Core Strategy and takes into account guidance from the NPPF. The IPPS has the weight of a 'material consideration' when determining planning applications.

Policy IP03: TOWN CENTRE DEVELOPMENT PRINCIPLES is of relevance to retail development and states:

Planning permission for development within the Town Centre Inset Area will be granted where, individually and cumulatively, it would deliver:

- *A completed pedestrian circuit to connect the Town Square westwards and northwards with Tesco;*
- *Defined spaces and squares at key junctions and arrival points;*
- *An effective, accessible and safe network of pedestrian and cycle routes into and through the Town Centre, including new or improved connections across the ring road and to/from Gunnels Wood and the Old Town;*
- *Increased passenger transport capacity and improved connectivity between bus and train whilst maintaining accessibility for the private car and service vehicles;*
- *Tall buildings at entrances and gateways into the town;*
- *A mix of uses that provide a vital and viable shopping area; and*
- *Development within the Town Centre Inset Area will be required to preserve and enhance both the Town Square Conservation Area and its setting, integrate successfully with existing development and permitted schemes to ensure a co-ordinated Town Centre.*

Development proposals which do not meet these principles, or prejudice our ability to do so in the future will be refused.

- 3.13 **We are advised by the Borough Council that, based on current projections, a NPPF compliant housing target for the Borough will be in the order of 6,000 new homes over the period 2011-31 and this is used as the baseline for this Study.**

Previous Retail Studies

- 3.14 Previous retail studies have been prepared by Cushman Wakefield in 2005 (which was commissioned by Stanhope/ING who were at that time the Council's preferred development partners for a proposed redevelopment in the Town Centre) and by King Sturge in 2007, which was updated in 2010.
- 3.15 These studies were prepared before the current economic recession which has impacted on the retail and development markets. There have been significant changes to planning policy particularly with regards to the abolition of regional strategies and the implications for growth in and around Stevenage which largely underpinned the scale of redevelopment proposals for the Town Centre.
- 3.16 The Council resolved to grant planning permission subject to the completion of a Section 106 agreement for the Town Centre regeneration scheme proposed by Stanhope/ING in January 2012. However, in May the developers terminated their involvement in the scheme. Whilst the Council will be considering the future of the Town Centre and will bring forward a strategy for its regeneration this is unlikely to be of the scale of the original proposals and it will be some years before development takes place.
- 3.17 However, the challenges facing Stevenage Town Centre identified in those reports still remain.

4 STEVENAGE TOWN CENTRE

General

- 4.1 Stevenage was the first of the post-war New Towns and the Town Centre reflects this. The centre consists of a series of pedestrianised precincts arranged in a rigid grid. These precincts provide a safe, car-free environment which make it easy to move around and there would appear to be good levels of public car parking as well as bus and train stations which are well located near to the centre giving good levels of accessibility. The original concept for the centre was based on a high degree of conformity in shop fronts, fascias and signage. The centre's importance as an example of town planning from this period was recognised in 1988 with the designation of the Town Square Conservation Area. The comments in this section of the Study are concerned with the effect that the characteristics of the centre have on its success as a retail centre in retaining and attracting retail trade rather than a view on the architectural merit and historical interest.
- 4.2 The buildings are generally three stories in height and whilst a limited number of shops trade on two floors, many upper stories appear to be used for storage and presumably staff accommodation which tends to give a disused appearance when viewed from ground floor level. Others have residential accommodation above which assists in bringing life to the centre particularly outside normal shopping hours.



Queensway, Stevenage



The Westgate Centre, Stevenage

- 4.3 Although the Council's Town Square Conservation Appraisal 2010 noted that street frontages were beginning to break down in terms of the intended uniform appearance, compared to most centres, shop fronts and fascias remain generally uniform and basic. Whilst the original concrete paving has been replaced by more attractive paving, street furniture and some planting and, in part, by new canopies, the overall impression, in retailing terms, is drab, uninspiring and unfashionable, having neither the variety and elegance of many pre-war centres nor the interest and vibrancy of more modern centres.



The Forum, Stevenage

- 4.4 Some buildings are clearly in need of maintenance, particularly to the canopies, and we understand that the designation of part of the centre as a Conservation Area is regarded by some as a barrier to improvements.
- 4.5 The Town Centre requires some rejuvenation and recognition that that public realm and shopping environment is not aligned to the modern day shoppers. There is a requirement to improve the quality of some of the peripheral car parks which are often the first impression of the Town Centre. It is suggested that these are reviewed in terms of space provision (particularly for family groups) and pricing policy.
- 4.6 There is also a requirement to invest in the public realm through improved hard and soft landscaping. It is considered critical that the council considers a protected budget for on-going maintenance and enhancement of the Town Centre environment. Should any out-of-centre development be permitted for whatever reason we would recommend that the Council seek contributions through Section 106 agreements which could be used to further improve the town centre and in so doing ameliorate and negative effects that such a development may have on vitality and viability.

Retail Profile

- 4.7 CACI classify Stevenage both as a 'Major Centre' and as a 'Mall Dominated Town'. Major Centres are the second tier of centre within the shopping hierarchy behind Primary Centres which range from International Centres in the case of London's West End, and major provincial and regional centres such as Birmingham and Ipswich. Other Major Centres against which Stevenage can be benchmarked include Tunbridge Wells, High Wycombe, Doncaster, Southend, Great Yarmouth and Milton Keynes. Mall dominated centres are, in the main, other New Towns such as Crawley, Telford and Redditch.
- 4.8 Stevenage achieves a Retail Footprint score of 741 compared to an average score of 807 for Major Centres. Within the classification Mall Dominated Major Centres, 'Premium' retailers such as John Lewis, Monsoon and Apple have a representation of up to 20%. Stevenage scores only 1%.

Catchment Area

- 4.9 Fig. 1 shows Stevenage's Catchment Area i.e. the area from which comparison trade is drawn from. The Primary Catchment Area (PCA) extends southward towards Knebworth and northward beyond, but not including, Letchworth. The Secondary Catchment Area includes Hitchin and Letchworth to the north, Buntingford to the east and Knebworth to the south. The Tertiary and Quaternary (where less than 25% of expenditure is drawn to Stevenage) areas extend to Potters Bar, Safron Waldon, Dunstable and northwards beyond Bedford.

- 4.10 Table 2 shows the analysis of the areas shown in Fig. 1 and demonstrates that Stevenage obtains a 39.6% comparison goods market share from the PCA amounting to £111.4m of a total of £213.9m. Similar centres achieve an average of 43.6% which shows that Stevenage performs slightly under benchmark due to the relative attractiveness of competing centres. However, the Residential Comparison Goods Market Potential figure of £213.9m places Stevenage at 98th of all centres which is slightly higher than Luton at £213.4m and Bedford at £202.8. Within the East of England region, Stevenage has the 11th highest figure.

| Catchment | Total Population | Total Comparison Goods Expenditure by Residents (£m) | Shopper Population | Comparison Goods Market Potential (£m) | Market Share (%) |
|------------------------|------------------|--|--------------------|--|------------------|
| Primary | 130,103 | £281.3 | 51,442 | £111.4 | 39.6% |
| Secondary | 142,010 | £298.5 | 24,032 | £50.4 | 16.9% |
| Core Catchment | 272,113 | £579.8 | 75,474 | £161.9 | 27.9% |
| Tertiary | 195,209 | £412.4 | 14,503 | £30.7 | 7.4% |
| Quaternary | 840,590 | £1,761.7 | 10,168 | £21.3 | 1.2% |
| Total Catchment | 1,307,912 | £2,753.9 | 100,146 | £213.9 | 7.8% |

Table 2: Stevenage Comparison Market Share Source: CACI

- 4.11 Fig. 2 shows the areas where Stevenage draws most of its trade. The area where Stevenage dominates the market with over 40% of weighted expenditure flows is a tight area around the centre extending eastwards. The areas immediately to the north, west and south are rated at over 30% but beyond this the influence of competing centres can be seen.
- 4.12 Please note that an area's 'market potential' is not the predicted actual turnover. CACI advise that approximately 40% of this potential is actually realised and it is these estimated values that are used in this Study. Readers are referred to the Retail Footprint User Guide included as Appendix 3 for a full explanation of this methodology.

Socio-Economic Profile

- 4.13 An area's socio-economic composition will determine not only the amount of spending capacity which is available to support retailing but also the types of goods that will be demanded. CACI provide an analysis of an areas socio-economic profile using the 'ACORN' classification which identifies 17 profiles ranging from 'Wealthy Executives' to 'Inner City Adversity'. The rural areas around Stevenage have a high representation of 'Wealthy Achiever' and 'Comfortably Off' households whereas Stevenage itself is dominated by less affluent 'Moderate Means' households.
- 4.14 As CACI report, *'The dominant groups in the catchment area are the Wealthy Executives (14%), the Secure Families (14%), Post-Industrial Families (14%) and Struggling Families (13%). These groups are of varying affluence levels but it is the less affluent Post-Industrial Families and 'Struggling Families' that are over represented; the Post-Industrial Families, who make up 14% of the catchment area only account for 5% of the households in the East of England and Struggling Families, who make up 13% of the catchment, make up 11% of households in the East of England'.*

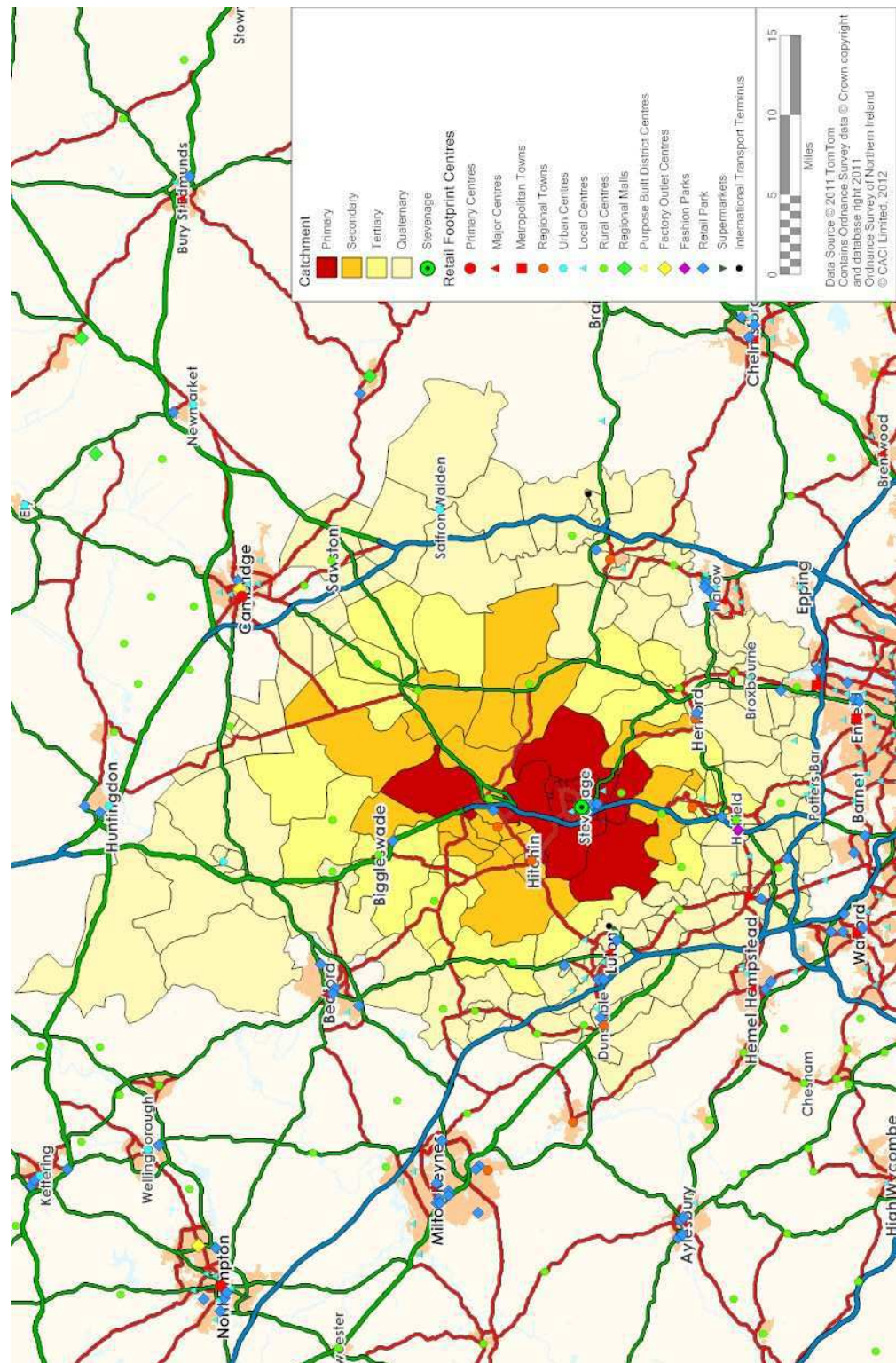


Fig 1: Stevenage Catchment Area. Source CACI Retail Footprint

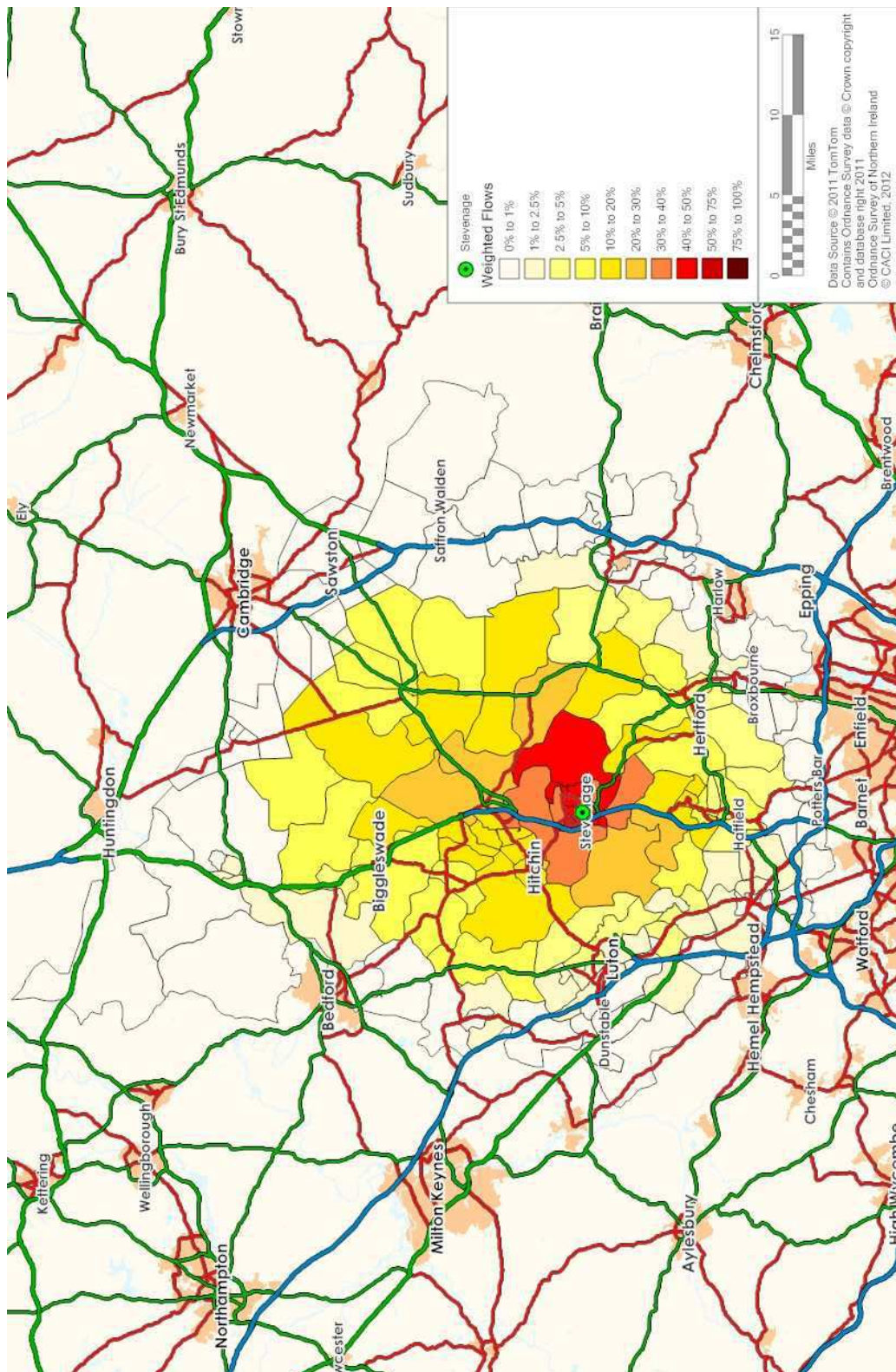


Fig 2: Stevenage Market Shares Source CACI Retail Footprint

- 4.15 The primary conclusion is that *'These less affluent groups are found in the largest volumes in Stevenage itself and it is these shoppers that the centre is currently appealing to. The more affluent residents in the outer catchments will prefer a very different retail offer and are likely to be choosing to shop elsewhere.'*

Household Spending

- 4.16 According to figures supplied by CACI, within the catchment area households spend on average £5,034 on comparison goods, £4,329 on convenience goods and £1,415 on catering. The spend on comparison goods is 10% above the UK average and 5% above the regional (East of England) average. Spending is particularly high on durable goods (18% above the UK average) and house and home (13% above UK average).

Other Sources of Expenditure

- 4.17 According to CACI, tourists spend £3.0m on shopping and workers from other areas contribute a further £3.5m in the 2012 base year.

Trade Leakage

- 4.18 In terms of the overall catchment area shown on Fig.1, Stevenage captures a market share of 7.8%. The main competitors are Luton (7.4%), St.Albans (5.2%) and Milton Keynes (5.0%). Looking at Stevenage's core catchment area where 75% of the town's trade is expected to originate, 9.7% of trade is drawn to Hitchin and 6.8% to Letchworth. The Roaring Meg Retail Park in Stevenage also draws 9.1% of the catchment area's trade.
- 4.19 Further analysis by CACI shows that the main competing centres (St Albans, Milton Keynes and Luton) have stronger 'Premium' and 'Mass Market' offers than Stevenage and that the more affluent shoppers in the catchment area will be drawn to those centres.

Floorspace Analysis

- 4.20 The 2012 Goad Report for Stevenage shows that in the Town Centre there are a total of 128 outlets occupying a gross floorspace of 605,900 sq.ft (56,290 sq.m.). Compared to UK averages, Stevenage has an average representation of convenience stores by number, but a lower than average by floorspace. By both measures, the centre has a high proportion of Comparison Shops. By contrast, Retail Services, Leisure Services and Financial & Business Services are under-represented.
- 4.21 Chart 1 shows the share of floorspace in Stevenage Town Centre by use and Chart 2 shows this distribution of Town Centre uses against the UK average. This shows a large proportion of Comparison Shops at the expense of the other categories, most notably Leisure Services.

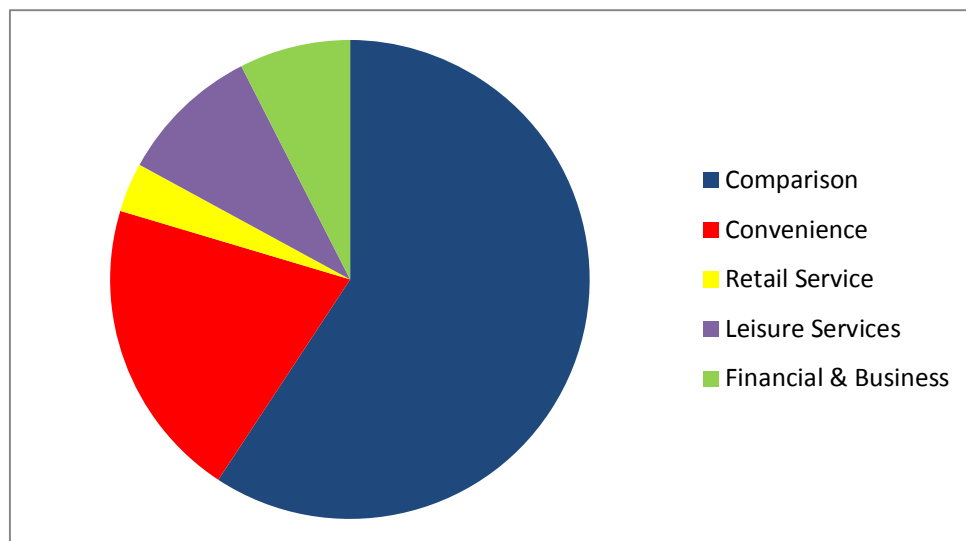


Chart 1: Distribution of Uses in Stevenage Town Centre Source: Goad 2012

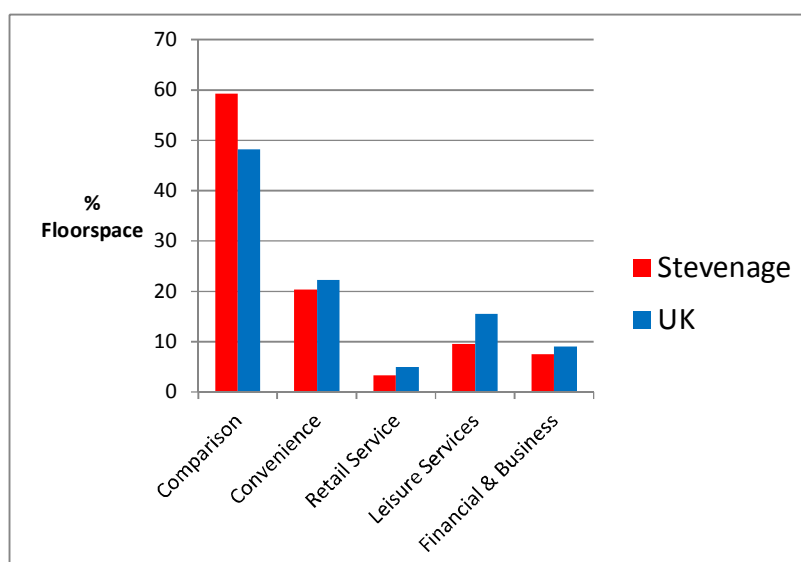


Chart 2 : Use Distribution of Town Centre Floorspace Source: Goad 2012

4.22 Where an index score of 100 is parity with the UK average, within the comparison goods sector Stevenage is well represented by numbers of outlets for Booksellers (170), Charity Shops (112), Department and Variety Stores (371), Footwear (190), Greeting Cards (164), Hardware (123), Jewellery (180), Ladies and Menswear and Accessories (159), Music and Video Recordings (171), Second Hand Goods (173), Sports, Camping and Leisure Goods (167), Telephones (372) and Cosmetics (146).

- 4.23 The following business sectors are poorly represented: Antique Shops and Art Dealers, Carpets and Catalogue Shops, Children's Wear, Craft and Gift Shops, Cycles, DIY, Florists, Fitted Furniture, Garden Equipment, Leather and Travel Goods, Musical Instruments, Photographic and Vehicle Accessories were not represented at all. The following were under-represented: Chemists (40), Electrical Goods (63), Furniture (48), Newsagents and Stationers (66), and Textiles and Soft Furnishings (65). It should be noted that a number of these under-represented categories are essentially sold from the retail parks which are not part of this survey.
- 4.24 Within the Convenience sector, the town is well represented with Bakers and Confectioners (123), Convenience Stores (110), Frozen Foods (306), Health Foods (189) and Markets (402). However the centre is underrepresented by Butchers, Confectionary, Tobacconists and Newsagents (CTNs), and Fishmongers which were not represented at all and Grocers and Delicatessens with a score of 48.

Vacant Floorspace

- 4.25 According to Goad, in 2012 there were 32 vacant units amounting to 14.36% of all units compared to a UK average of 12.22%. However this amounts to 9.96% of floorspace compared to a UK average of 10.16%.
- 4.26 The amount of vacant property in the Town Centre is also monitored by the Council. Chart 3 shows the trends both in numbers of units and in terms of floorspace between 2009 and 2012. According to their survey, between October 2011 and January 2012 the number of vacant units decreased from 31 to 25 (14.3% to 11.6%) and the amount of vacant retail floorspace fell by 1,509m² from 5,509 m² to 4,000m² (6.0% to 4.5%). These figures are more positive than the Goad survey and this can probably be explained by a variation in survey area and calculation of floorspace.
- 4.27 From our own observations we conclude that, compared to many other centres, vacant floorspace is not a major problem in Stevenage with the largest concentrations in the secondary areas. As with all centres, Stevenage is vulnerable to the failure of national retailers in the Core Area.

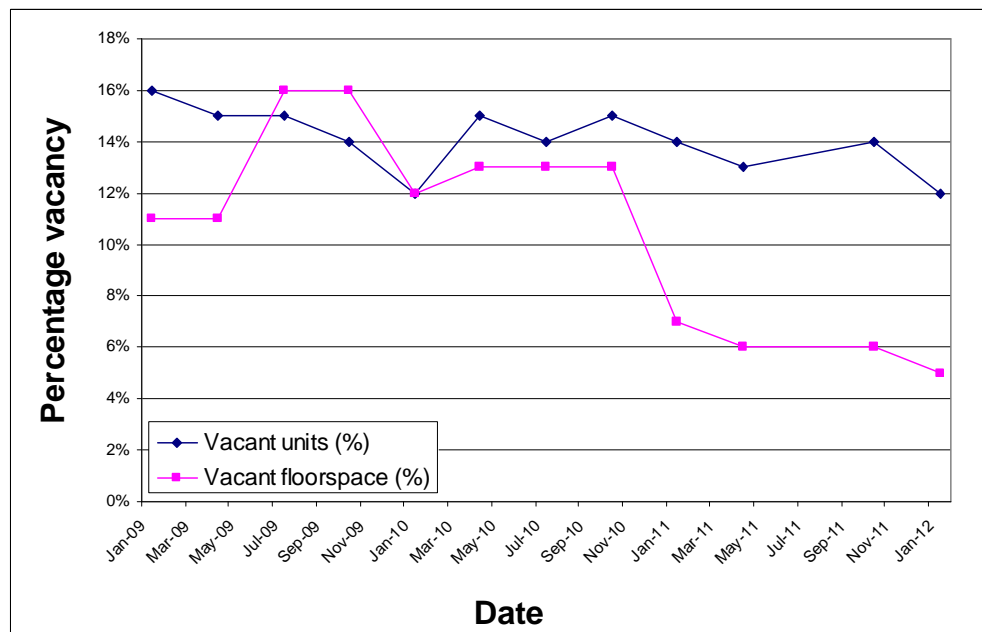


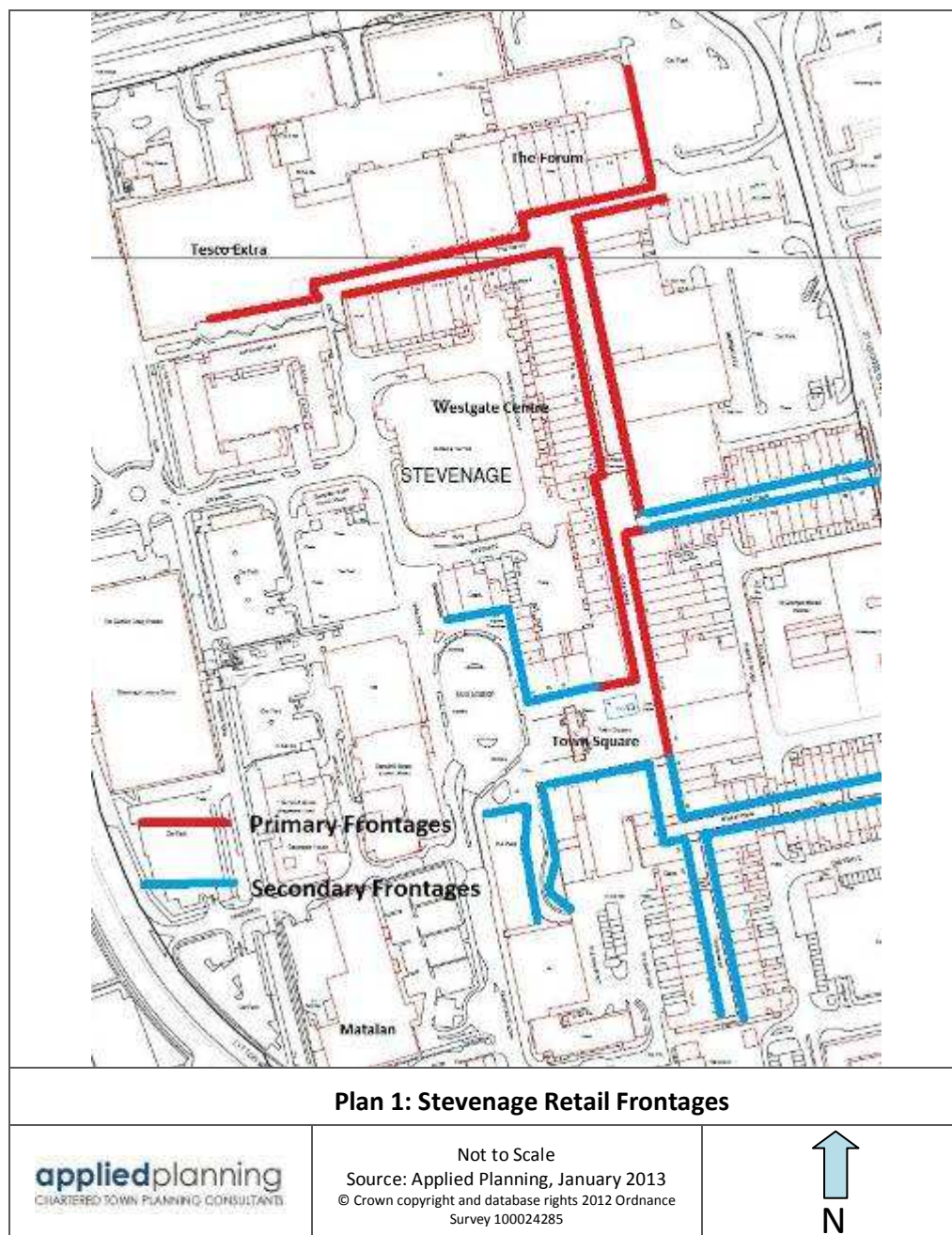
Chart 3: Vacant Property Trends 2009-12 Source: Stevenage Borough Council

Retail Rental Levels and Retail Investment Yields

- 4.28 Rental and investment yield levels are often regarded as useful indicators of a centre's health. A buoyant demand for shop units and a low level of vacant properties will tend to drive rents higher and investment yields reflect investor confidence with prospects for rental growth and security of income being the underpinning factors.
- 4.29 Both figures are influenced to a great extent by national trends and currently reflect the pressure that the retail market is under largely as a result of the recession with many retailers unable to pay increased rents and levels of business failures and longer void periods increasing the investment risk. For these reasons, the long term movement of rents and yields against similar centres gives an indicator of comparative health.
- 4.30 A report in December 2012 by PROMIS showed that Stevenage's prime retail rents are consistently lower than comparable centres but that investment yields are slightly better. The Report indicates that at mid-2012 Prime Zone A rents in Stevenage were £80 per sq.ft. (£7.43 sq.m.) which, as with most centres, was a fall compared to the end of 2011. The Report estimates that yields on prime retail properties in Spring 2012 stood at 7.75% which was a softening on previous results. Again, the Stevenage figures mirror the general movements in rents and yields across the UK as a result of the effects of the recession on the retail sector.

Retail Frontages

- 4.31 We have reviewed the Council's distinction between Primary and Secondary Retail Frontages. The only alteration we propose is to extend the Primary Frontage along the eastern flank of The Forum. The Primary Frontages would include the malls in the Westgate Centre which are not detailed on Plan 1 below.

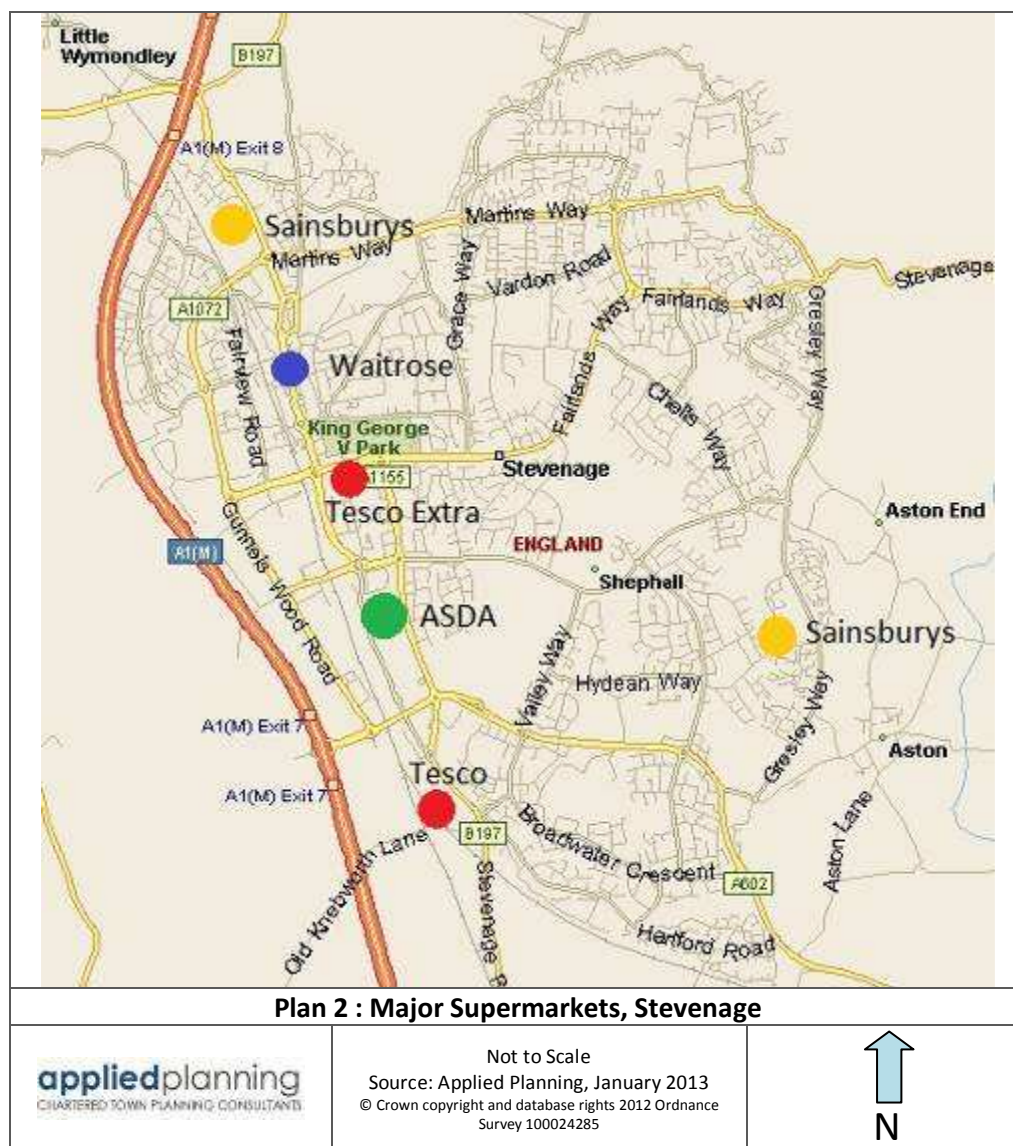


Other Town Centre Uses

- 4.32 As may be expected, the Town Centre contains a number of non retail uses including Estate Agents, Banks and Building Societies (Financial & Professional A2), Restaurants and Cafes (A3), Drinking Establishments (A4) and Take-Aways (A5) and Beauty Parlours and Tattoo Studios (Sui Generis). It can be seen from the Goad analysis in Charts 1 and 2 that all these uses are at or below the national average. Generally, these are not within the Prime Shopping Area or in such concentrations as to be detrimental to the shopping centre.
- 4.33 The Town Centre has a Costa Coffee, a Greggs Cafe, a McDonalds and Burger King along with a number of independent cafes. Bars and restaurants are essentially limited to a JD Wetherspoons and a small number of pizza outlets and take-aways. Consequently there is no evening economy as such. If it were considered desirable to promote the Town Centre as a night time leisure destination there would have to be a significant influx of bars and restaurants to effect a change. However, Old Town provides a good choice of bars and restaurants and the Leisure Park has a number of restaurants as well as a cinema and bowling alley to cater for existing and forecast needs. Stevenage is unusual in having these discrete areas. However, these areas compliment the Town Centre and it may well be prudent to maintain the existing separate roles of these centres rather than to pursue a policy which would weaken the overall offer.
- 4.34 With regard to leisure uses we do not consider that there is any need to cater for large space uses such as bowling alleys, cinema, bingo and nightclubs in the Town Centre. This is because they are already primarily catered for at the Stevenage Leisure Park which has critical mass for this type of destination and uses in this location are isolated from other uses such as residential to which disturbance could be caused.
- 4.35 With regards to A3 and A4 uses such as bars and restaurants we recommend that uses that support the retail function of the Town Centre such as cafes and snack bars should, in general, be encouraged especially in the more secondary locations. The local authority should monitor such changes of use and, although we think it unlikely, should introduce policies to prevent a harmful proliferation in the Core Shopping Area.
- 4.36 In relation to A3 restaurants and A4 bars which heavily rely on evening trade we recommend that such uses should be resisted, possibly through planning conditions limiting opening hours. In order to be successful these uses need to be part of a critical mass which could be harmful to established retail patterns and the amenities of residents in the Town Centre.
- 4.37 In general, the Town Centre is not a suitable location for A5 takeaway uses due to poor access by car. Such uses can also harm vitality and viability of the centre.

5 CONVENIENCE SHOPPING

- 5.1 Stevenage has six large supermarkets as shown on Plan 2. Four of these stores, Tesco Extra, ASDA and both Sainsburys are classified as superstores (stores having more than 2,500 sq.m. trading floorspace).



- 5.2 The Tesco Extra is part of The Forum and is an 'in-centre' store. It has a trading floorspace of 4,925 sq.m. of which we estimate that 30% is dedicated to comparison goods. The store has 40 check-outs and car parking for 612 cars as well as access to other car parking facilities in the town. (Data from IGD 2009).

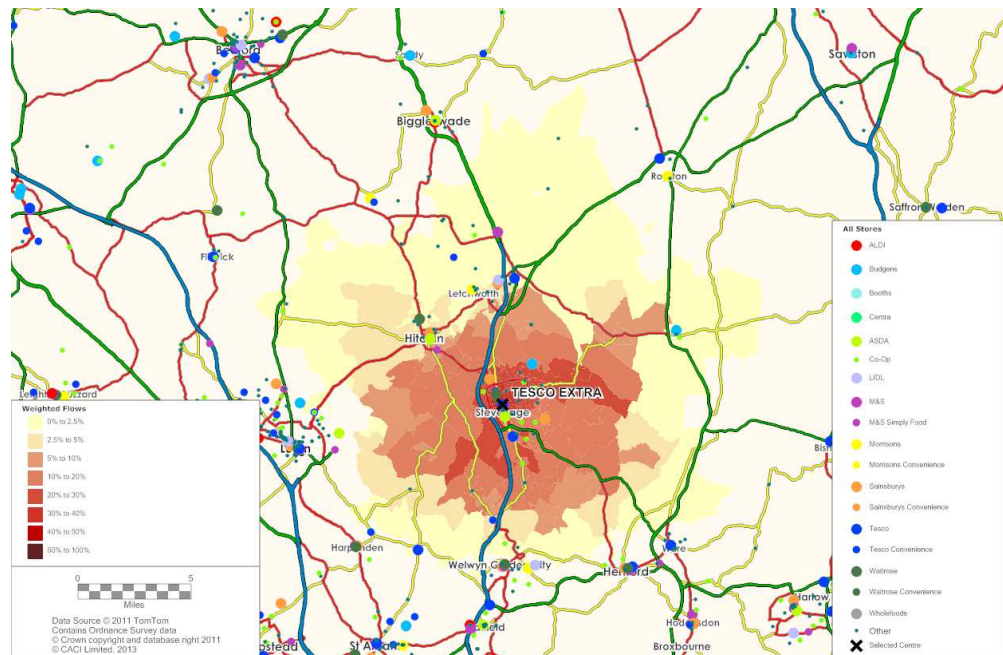


Fig 3: Catchment Area, Tesco Extra Source CACI ProVision

- 5.3 The Primary Catchment Area for the Tesco Extra is the central areas of Stevenage extending along Fairlands Way. The store has a penetration rate of over 10% up to but not including Hitchin, Letchworth, Baldock, Buntingford and Welwyn.
- 5.4 The second Tesco store is at the Broadwater Retail Park with a floorspace of 3,507 sq.m. with car parking for 390 cars. We estimate that 20% of the floorspace is used for comparison goods sales.
- 5.5 It can be seen from the catchment area plan that the store's Primary Catchment Area is central southern and western Stevenage with significant areas of overlap with the Tesco Extra store particularly in eastern Stevenage.



Tesco Extra, Stevenage Town Centre and Waitrose, Old Town

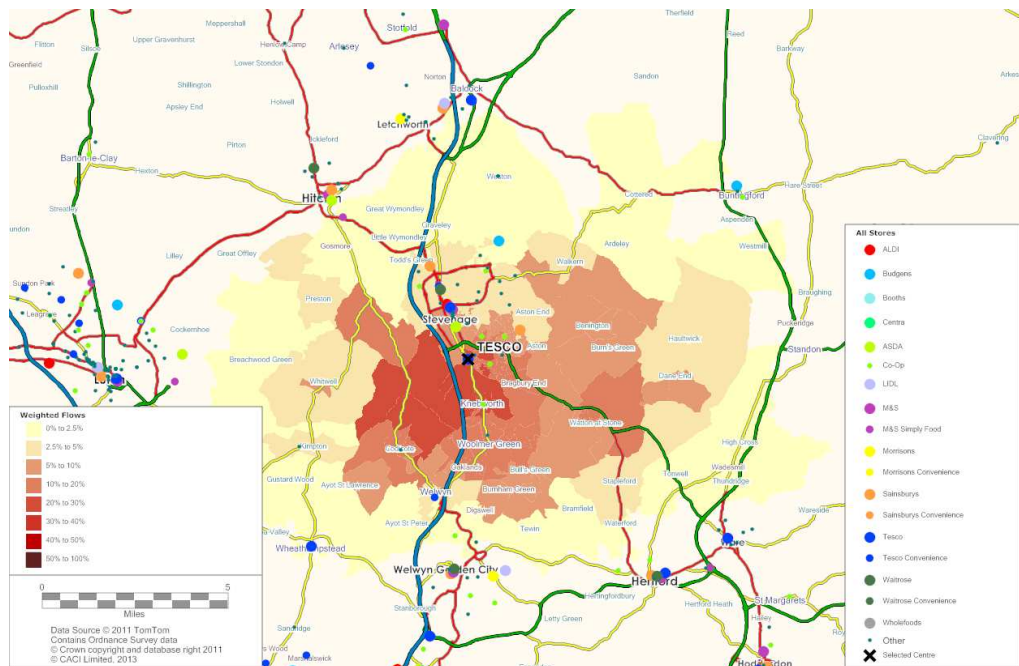


Fig 4: Catchment Area, Tesco Broadwater Source CACI ProVision

5.6 The ASDA store at Monkwood Way has a trading floorspace of 6,666 sq.m. and parking for 652 cars. We estimate that comparison goods account for up to 35% of the sales area. Both Tesco Broadwater and ASDA stores are classified as an out-of-centre stores.

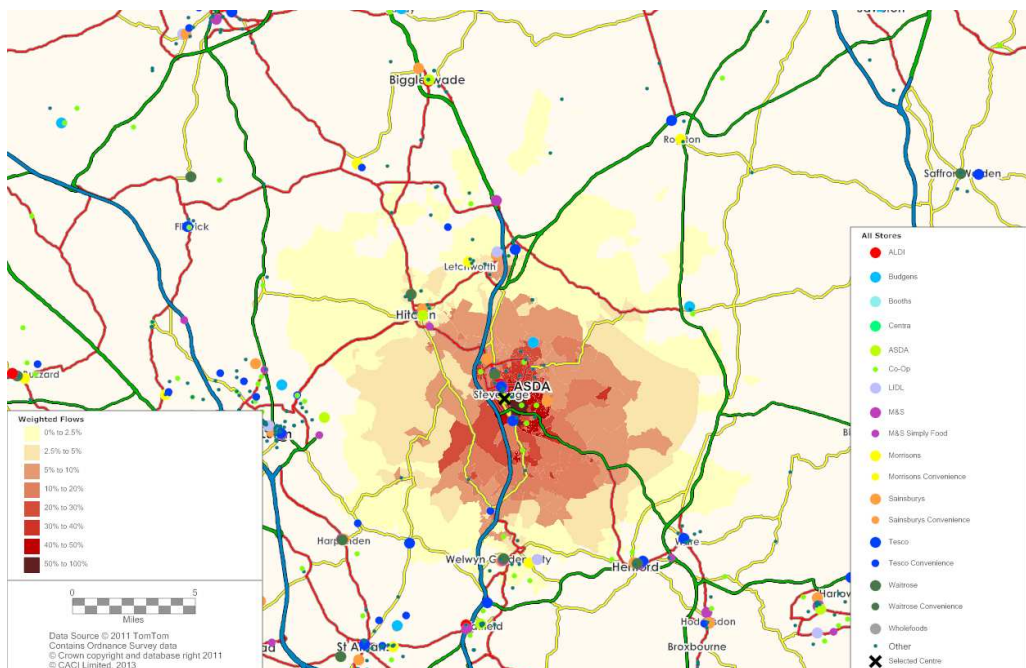


Fig 5: Catchment Area, ASDA Source CACI ProVision

- 5.7 The 'footprint' for the ASDA store is noticeably more concentrated than either of the Tesco stores and achieves high penetration rates throughout the Borough's area.
- 5.8 Sainsburys have two superstores in Stevenage. The store at Corey's Mill on Hitchin Road has a trading floorspace of 3,575 sq.m., 28 check-outs and car parking for 503 vehicles. This is classified as an out-of-centre store. As may be expected, this store's catchment area is primarily north Stevenage and extends to include Hitchin.

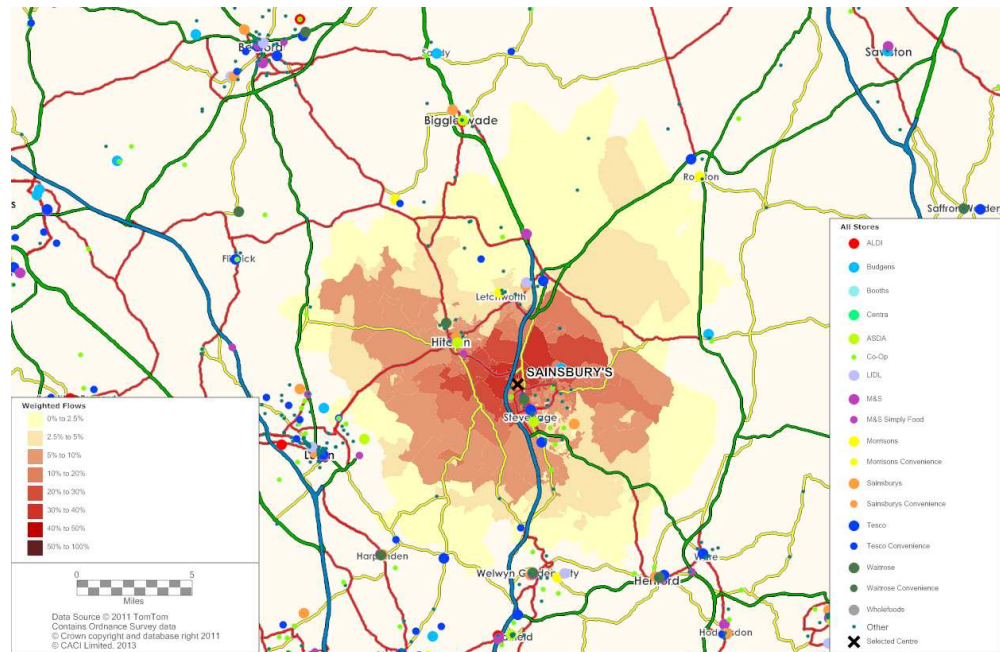


Fig 6: Catchment Area, Sainsburys Corey's Mill Source CACI ProVision

- 5.9 The store at Magpie Crescent forms the basis for The Poplars Local Centre. It has a trading floorspace of 3,620 sq.m., 26 check-outs and parking for 463 cars. Whilst being classified as a Local Centre clearly a store of this size will draw much of its trade from beyond the local community and this is confirmed by the catchment area map which shows high penetration rates for western and southern Stevenage extending in the direction of Hertford. We would estimate that 20% of both stores are devoted to the sale of comparison goods.

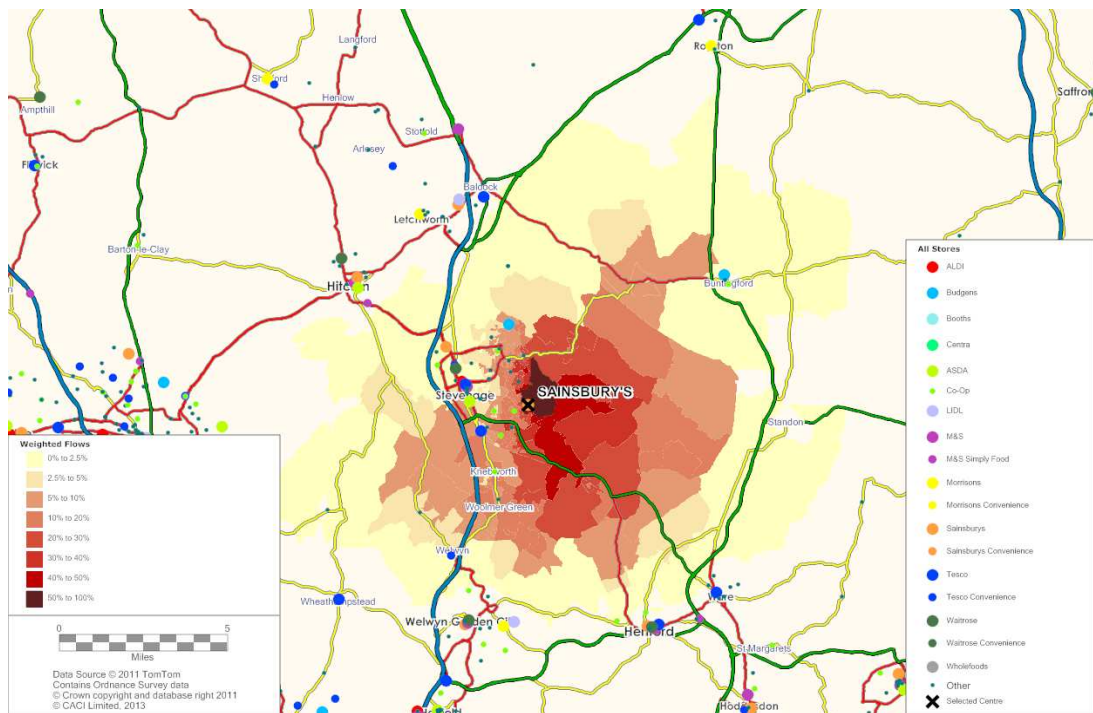


Fig 7: Catchment Area, Sainsburys Magpie Crescent Source CACI ProVision

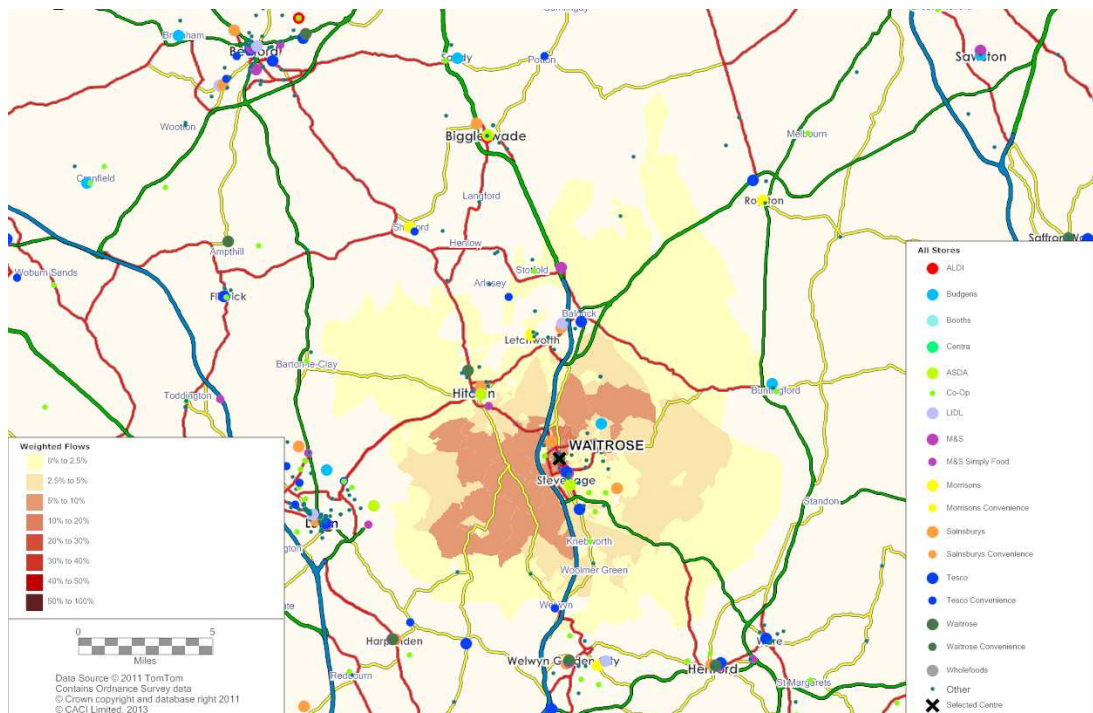


Fig 8: Catchment Area, Waitrose, Old Town Source CACI ProVision

- 5.10 The Waitrose store is in High Street, Old Town and is as an 'in-centre' store. It has a trading floorspace of 1,348 sq.m., 8 check-outs and parking for 146 cars along with the use of parking facilities within Old Town. Waitrose sell a negligible amount of comparison goods and due to their positioning in the retail market can attract trade over a wide area. The catchment area for the store shows a smaller market share than the other major supermarkets but it does attract some trade over a wide catchment area covering much of Hertfordshire.
- 5.11 Other significant convenience stores include Marks and Spencer (650 sq.m.), Frozen Food specialists Iceland (510 sq.m.) and Farmfoods in Stevenage Town Centre which also has Costcutter, Londis, Premier and Savers convenience stores. The Co-operative operate a number of convenience stores within the Local Centres the most notable being Broadwater Crescent (120 sq.m.), Hydean Way (139 sq.m.), Filey Close (148 sq.m.), The Hyde (254 sq.m.) and The Oval (239 sq.m.). There are Tesco Express stores in Old Town and at The Glebe as well as a One Stop convenience store at Broadwater Crescent. Other smaller independent convenience stores are identified in the section of the Study which describes the Local Centres in more detail.
- 5.12 In general Stevenage is well served by a choice of stores catering for both main and top-up shopping. Whilst the bulk of shopping trips to the larger supermarkets, particularly for main shopping, will be undertaken by car, all centres are well served by public transport.

6 OUT OF CENTRE RETAIL PARKS

6.1 Stevenage has a range of out-of-centre retail warehouse parks as shown on Plan 3.

Roaring Meg North

6.2 Stevenage's largest concentration of out-of-centre retail provision is at Roaring Meg Retail Park North. The principle access is off Monkswood Way to the south of the Town Centre.

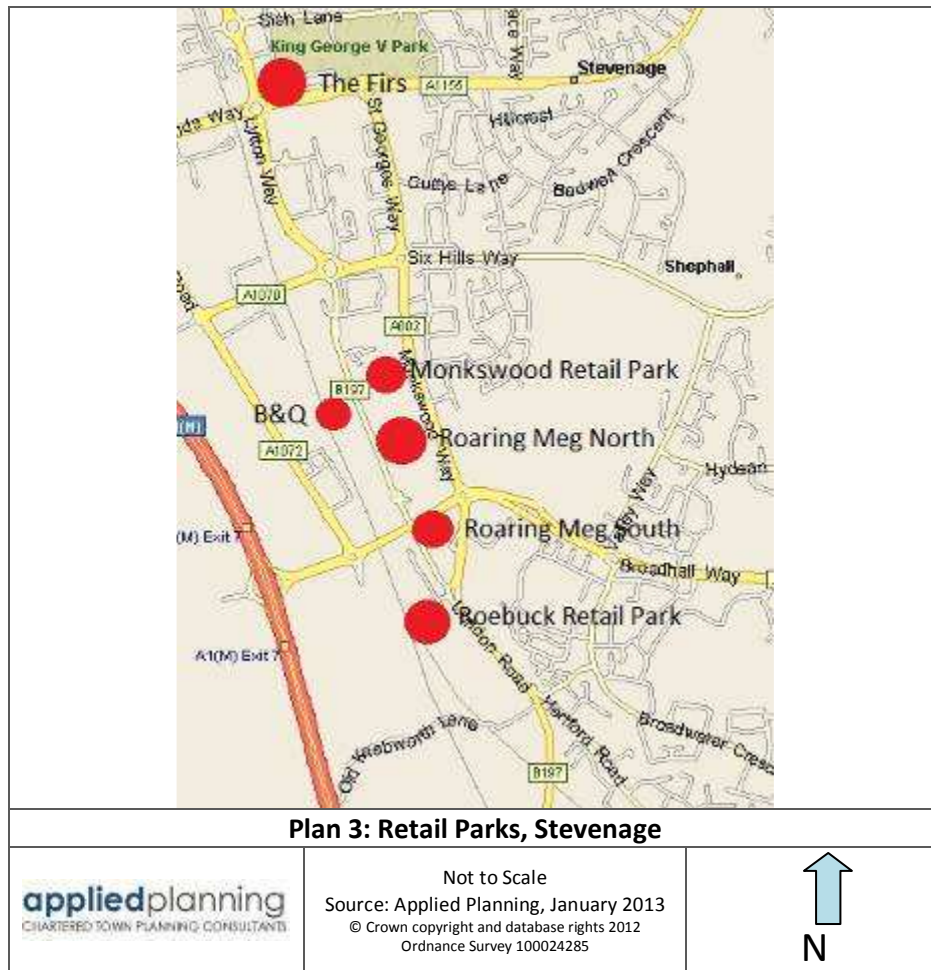
6.3 The Retail Park has a total of 15 retail units and a total retail floorspace of 39,105 sq.m. gross including mezzanine floors. The Park also contains 6 leisure units and 4 catering outlets. The current occupiers are:

| | |
|------------------------|---------------------------------|
| Wren Kitchens | 1,222 sq.m. including mezzanine |
| Boots | 916 sq.m. |
| Currys | 3,809 sq.m. |
| DFS | 1,736 sq.m. |
| Homebase | 5,957 sq.m. including mezzanine |
| Fitness First | 929 sq.m. |
| ScS | 1,577 sq.m. including mezzanine |
| Carpetright | 929 sq.m. |
| Pizza Hut | 297 sq.m. |
| Oak Furnitureland | 1,208 sq.m. including mezzanine |
| Costa Coffee | 139 sq.m. |
| Argos | 3,696 sq.m. including mezzanine |
| Gambardo (Leisure) | 1,443 sq.m. including mezzanine |
| Paul Simon (Household) | 1,336sq.m. including mezzanine |
| Burger King | 371sq.m. |
| Hobbycraft | 1,469 sq.m. including mezzanine |
| Toys R Us | 5,037 sq.m. including mezzanine |
| Harvester | 278 sq.m. |
| Harveys | 1,612 sq.m. including mezzanine |

6.4 As at April 2013 there were two vacant units having a total floorspace of 3,154 sq.m. including mezzanines.



Roaring Meg Retail Park



6.5 On the opposite side of London Road is a large freestanding B&Q.



B&Q unit, London Road

Roaring Meg South

- 6.6 Roaring Meg South is located to the south west of Monkwood Way/Broadhall Way Roundabout and extends to 5,945 sq.m. gross. The Park contains two retail units which are occupied by Wickes and The Range. In addition there is a car wash on the site.

Monkwood Retail Park

- 6.7 Monkwood Retail Park is immediately to the north of Roaring Meg North. At the time of the survey tenants included Comet, Blockbuster, McDonald's, Topps Tiles, Jollyes (Pets) and Mothercare. Since the survey, both the Comet and Blockbusters have gone into liquidation.

The Firs

- 6.8 Is a small Retail Park occupied by Aldi, Majestic Wine and Pets at Home. The site is to the north of Fairland Way and is connected to the Town Centre by a pedestrian/cycle underpass.

Roebuck Retail Park

- 6.9 Roebuck Retail Park has a floor area of 7,563 sq.m. gross providing five units with principal occupiers being Halfords, PC World. Carphone Warehouse, Dunelm Mill, In & Out, Laura Ashley and Maplin Electrical.

Commitments

- 6.10 Planning permissions (07/00126/OP and 11/00296/RMM) have been granted for 3 retail units at a site on London Road opposite Roaring Meg. The use of the site is limited to the sale of furniture, soft furnishings, carpets and other floor coverings, home improvements, gardening and electrical goods). In addition. we are aware of an extant planning permission which would add 527 sq.m. as a mezzanines to an existing unit.

7 DISTRICT AND LOCAL CENTRES

7.1 The Stevenage District Plan 2004 differentiates between Large and Small Neighbourhood Centres. The Old Town is considered to be a Large Neighbourhood Centre, but due to its special characteristics it is dealt with separately. We have followed this classification in this Study.

7.2 In addition to Old Town, the Large Neighbourhood Centres are:

1. Bedwell Crescent
2. The Glebe
3. The Hyde
4. Marymead
5. Oaks Cross
6. The Oval
7. The Poplars
8. Canterbury Road
9. Filey Close
10. Chells Manor

and the Small Neighbourhood Centres are:

1. Archer Road
2. Austen Paths
3. Burwell Road
4. Fairview Road
5. Hydean Way
6. Kenilworth Close
7. Lonsdale Road
8. Mobbsbury Way
9. Popple Way
10. Rockingham Way
11. Roebuck
12. Whitesmead Road

Old Town

7.3 Stevenage Old Town, as the name suggests, is the original pre-New Town Stevenage which is located approximately 600m north of the Town Centre. The character of Old Town is more akin to the surrounding areas of Hertfordshire than that of the remainder of Stevenage. Retailing in Old Town is in a linear pattern along High Street. There is ample on-street parking as well as public car parking off Primett Road.



- 7.4 Applied Planning surveyed Old Town in November 2012. A total of 141 businesses were identified and the results of the survey are shown in Table 4.
- 7.5 Within the High Street area a total of 5,095 sq.m. in Use Classes B1a, B2, C1 and D1 were noted. We have also included Beauty Parlours and Tattoo Studios totalling 272 sq.m. which are 'Sui Generis' within Comparison Floorspace.
- 7.6 From these figures it can be seen that Old Town has a very low vacancy rate. Restaurants and Bars account for a larger than usual proportion of floorspace emphasising Old Town's role as a leisure destination. Convenience shopping accounts for a large proportion of floorspace but is largely accounted for by a Waitrose and a small Tesco Express convenience store. The amount of space in Use Class A2 (Financial & Professional) shows the popularity of Old Town by Estate Agents.
- 7.7 Comparison shopping has in effect been squeezed by these other uses but Old Town accommodates a diverse mix of independent businesses. The stock of retail premises generally provides small shop units that are not available in the Town Centre.
- 7.8 The quality of the environment of the shopping area in Old Town is very good with a variety of highly individual building styles and shop fronts. The centre displays good levels of vitality during the day and evening. These qualities and mix of businesses is in complete contrast with the Town Centre but, overall, the two areas are complimentary in their functions.

| | Sq.m.Net | % |
|--------------------------|----------|------|
| Comparison | 4,194 | 27.1 |
| Convenience | 3,531 | 22.8 |
| Vacant | 448 | 2.9 |
| Financial & Professional | 1,766 | 11.4 |
| Restaurants & Cafes | 3,067 | 19.8 |
| Bars | 1,960 | 12.7 |
| Take-Aways | 518 | 3.3 |
| | | |
| Total | 15,484 | |

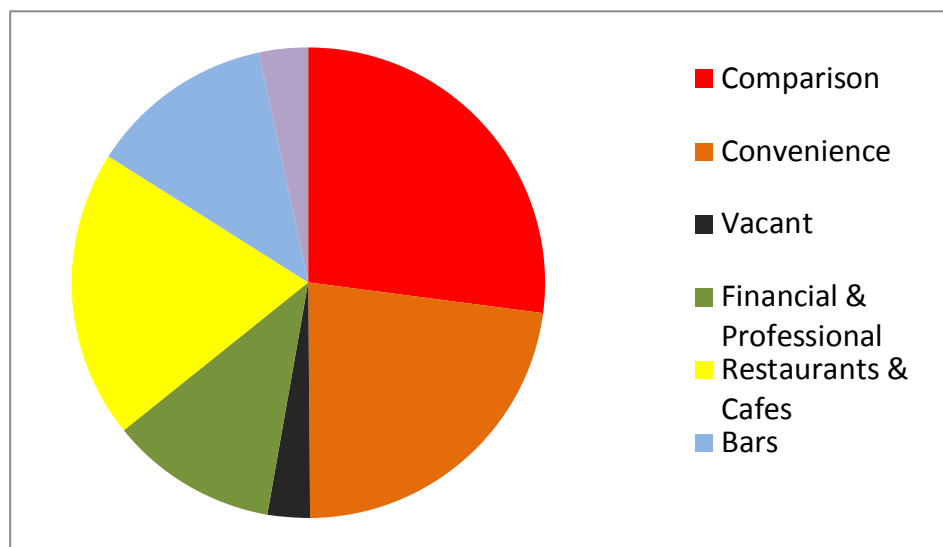


Table 4: Floorspace Analysis, Old Town Source: Applied Planning Nov 2012



Variety of Shops and Restaurants, Old Town

- 7.9 We have no data on rental levels or investment yields of retail properties in Old Town but the low vacancy rates would indicate a reasonable demand for premises and a good overall level of viability. The fact that there are a high proportion of small independent businesses where failure rates are usually high would lead us to suspect that there is a steady turnover of businesses but this is probably offset by a good level of demand for premises as they become available and not harmful to the centre as a whole.
- 7.10 Old Town serves the immediate community primarily for convenience shopping as well as a wider catchment drawn to the bars and restaurants and a retail offer that is not otherwise available in Stevenage. Our overall conclusion is that Old Town is very healthy in retail terms but we see no evidence of a qualitative or quantitative need to allocate new retail floorspace.

Large Neighbourhood Centres

1. Bedwell Crescent

- 7.11 Bedwell Crescent is a Large Neighbourhood Centre located approximately 500 m. to the east of the Town Centre. The centre includes a forecourt used for parking up to 40 cars. Retail provision is provided at ground floor level to the north and east of the car park.
- 7.12 Bedwell Crescent contains ten units providing approximately 711 sq.m. gross of floorspace. All of the units besides William Hill Bookmakers are independent shops. The Centre accommodates a range of businesses but there are no comparison goods retailers, besides a pharmacy. There is also a Community Centre and Public House adjacent to the centre.



| Bedwell Crescent | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | 1 | 19 |
| CTN/Off Licence | 2 | 17 |
| Comparison Goods | | |
| Charity Shops | | |
| Pharmacy | 1 | 10 |
| Opticians | | |
| Takeaways | 3 | 27 |
| Cafes/Restaurants | 1 | 8 |
| Bookmakers | 1 | 11 |
| Hairdressers/Beauticians | 1 | 8 |
| Other | | |
| Vacancies | | |
| TOTAL | 10 | 100 |

Source: Applied Planning Oct 2012

- 7.13 A total of 36% of the floorspace is used for the sale of convenience goods, of which 19% is in Bedwell Supermarket, an independent foodstore. The largest proportion of floorspace is dedicated to hot food takeaways which comprise 27% of all floorspace. There are no vacant units in the centre.

- **Strengths** – There is a good range of basic services which cater for residents day-to-day needs.
- **Weaknesses** – The Centre is in need of repair and maintenance and the canopy diminishes the environmental quality of the Centre.

2. The Glebe

- 7.14 The Glebe is a Large Neighbourhood Centre located towards the eastern part of the town. The Centre includes a car parking forecourt with space for approximately 35 cars. The car park is fronted by ground floor units to the west, north and east with between two and four storeys of residential accommodation over the shops. Units are also located on a thoroughfare to the north east of the car park.
- 7.15 The Glebe contains 24 units which provide approximately 2,237 sq.m. gross of floorspace. The Centre provides a good range of floorspace including both multiple, franchise and independent convenience goods stores, a wide range of service uses including hairdressers and a launderette. The Glebe is also one of the few neighbourhood centres to sell comparison goods (beside pharmacies) and at the time of the survey The Glebe included a DIY shop, charity shops and a bicycle shop.
- 7.16 A former public house located 20 metres to the west of the car park has been converted into a Tesco Express. In total 23% of floorspace in the Glebe is apportioned to foodstores. The quantity and quality of provision meets residents day-to-day top-up shopping needs. There are currently two vacant units in the Glebe, which is lower than the four units identified in the 2007 Neighbourhood Centres Study and the three units identified in 2010 Stevenage Retail Capacity Assessment



| Glebe | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | 3 | 23 |
| CTN/Off Licence | 2 | 9 |
| Comparison Goods | 2 | 12 |
| Charity Shops | 2 | 7 |
| Pharmacy | 1 | 4 |
| Opticians | 1 | 3 |
| Takeaways | 3 | 11 |
| Cafes/Restaurants | 2 | 7 |
| Bookeepers | 1 | 3 |
| Hairdressers/Beauticians | 2 | 6 |
| Other | 3 | 11 |
| Vacancies | 2 | 5 |
| TOTAL | 24 | 100 |

Source: Applied Planning Oct 2012

7.17 The Centre has a good mix of retail and community uses and the centre has benefited from recent investment in the public realm.

- **Strengths** – There are a good range of shops and complementary uses which meet the day-to-day needs of residents. The number of vacant units have halved over the last five years.
- **Weaknesses** – A shortage of car parking at peak periods.

3. The Hyde

7.18 The Hyde is a Large Neighbourhood Centre located towards the south eastern part of the town. The Hyde includes a car parking forecourt with space for approximately 40 cars. The core shopping area comprises a healthy mix of uses which are supported by secondary retail units to the north.

7.19 The Centre is anchored by a Co-operative foodstore as well as a Martins CTN which meet the day-to-day top-up shopping requirements of residents. There are also a range of independent convenience and comparison operators including oriental food, bakery, off license, domestic appliances, angling, car parts and computer retailers. Whilst there remains a vibrant mix of independent and multiple retailers it is noted that a number of independent operators have closed in The Hyde in recent years.



| The Hyde | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | 3 | 23 |
| CTN/Off Licence | 2 | 11 |
| Comparison Goods | 6 | 17 |
| Charity Shops | 1 | 4 |
| Pharmacy | 1 | 3 |
| Opticians | | |
| Takeaways | 6 | 17 |
| Cafes/Restaurants | 1 | 2 |
| Bookeepers | 1 | 3 |
| Hairdressers/Beauticians | 2 | 5 |
| Other | 3 | 9 |
| Vacancies | 2 | 6 |
| TOTAL | 28 | 100 |

Source: Applied Planning Oct 2012

7.20 The Hyde contains 28 units which comprise of approximately 2,314 sq.m. gross of floorspace. A total of 34% of floorspace is apportioned to convenience goods of which 23% are foodstores. 17% of floorspace comprises of comparison goods (excluding charity shops), this is a relatively high percentage and is representative of the large quantum of floorspace in the centre and its function in the retail hierarchy.

7.21 It is noticeable that there are a high proportion of takeaways in the Centre, which provide 17% of all floorspace. This is relatively high proportion of floorspace which is an indicator of low retailer demand. However, there are currently only two vacant units, which is a significant improvement since the 2010 Retail Study when four vacant units were identified which is indicative of the improving health of the Centre.

- **Strengths** – There is a good variety of shops and supporting town centre uses which meet the day-to-day need of residents.
- **Weaknesses** – The number of independent comparison stores has reduced over recent years which has impacted on the retail diversity of the Centre.

4. Marymead

7.22 Marymead is a Large Neighbourhood Centre located towards the south of the town. The main parade of shops front onto a forecourt car park which contains approximately 40 spaces. A second cluster of single storey shops and a community centre on a pedestrian access is situated to the northeast of the main shopping area.

7.23 The Centre contains 13 units which provide approximately 1,366 sq.m. gross of floorspace. The Centre is anchored by a Co-operative foodstore which meets the day-to-day shopping need of residents. Other than a charity shop the Centre does not contain any comparison goods floorspace.



| Marymead | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | 1 | 21 |
| CTN/Off Licence | 1 | 6 |
| Comparison Goods | | |
| Charity Shops | 1 | 10 |
| Pharmacy | 1 | 6 |
| Opticians | | |
| Takeaways | 3 | 19 |
| Cafes/Restaurants | | |
| Bookmakers | 1 | 6 |
| Hairdressers/Beauticians | 1 | 6 |
| Other | | |
| Vacancies | 4 | 27 |
| TOTAL | 13 | 100 |

Source: Applied Planning Oct 2012

7.24 The Centre provides a well balanced range of complementary uses including pharmacy, takeaways, betting shop and hairdressers. However, vacancy rates within the Centre are very high and there are currently four vacant units which amounts to 27% of floorspace, albeit three of these vacant units are located in the secondary shopping area.

7.25 Noticeably only two vacant units were identified in the 2010 Retail Study. This increase in vacant units is demonstrative of declining vitality and viability in the Centre.

- **Strengths** – The Centre has a foodstore which meets the day-to-day top-up shopping needs of residents as well as a range of complementary uses.
- **Weaknesses** – The centre has a high percentage of vacant units which has increased in recent years which indicates that the vitality and viability of the Centre is declining.

5. Oaks Cross

- 7.26 Oaks Cross is a Large Neighbourhood Centre located towards the southern part of the town. The Centre comprises of a square with buildings on three sides. The central part of the square is given over substantially to car parking which is relieved by a central landscaped paving area.



- 7.27 The Centre contains 11 units which comprise 828 sq.m. gross floorspace. A Premier Foodstore provides a basic convenience goods offer for residents, this is complemented by other uses including post office, pharmacy, betting shop, takeaways, florist, beauticians and hairdressers.

| Oaks Cross | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | 1 | 20 |
| CTN/Off Licence | 1 | 9 |
| Comparison Goods | 1 | 7 |
| Charity Shops | | |
| Pharmacy | 1 | 8 |
| Opticians | | |
| Takeaways | 4 | 29 |
| Cafes/Restaurants | | |
| Bookeepers | 1 | 9 |
| Hairdressers/Beauticians | 2 | 18 |
| Other | | |
| Vacancies | | |
| TOTAL | 11 | 100 |

Source: Applied Planning Oct 2012

7.28 There are currently no vacant units in the centre. By contrast, three vacant units were identified in 2010 Retail Study. Over the same period the number of takeaways has increased from two to four. This indicates that whilst the number of vacancies has decreased this is not due to an increase in retail floorspace provision.

- **Strengths** – A good variety of shops and complementary Town Centre uses. The number of vacant units has reduced significantly in recent years
- **Weaknesses** – A high proportion of the floorspace is occupied by takeaways, hairdressers and beauticians which is indicative of a low retail demand.

6. The Oval

7.29 The Oval is a Large Neighbourhood Centre located in the north of the town. The Centre is introverted in nature designed facing inwards to an internal pedestrian-only L-shaped shopping street. Although the area is partially overlooked by flats above the shops, and despite the presence of CCTV cameras, the internal nature of the Centre creates an uncomfortable and potentially threatening environment.

7.30 The centre contains 25 units which extend to 2,956 sq.m. gross and provide a wide variety of shops and community uses which meet the day-to-day needs of residents. There are four foodstores in the centre including a Co-operative, an International convenience store, butchers and bakers. These are complemented by a Martins CTN and an off license.

7.31 There are a number of specialist comparison goods and other uses which draw trade from beyond the immediate catchment and include hardware, flooring, car parts and bridal stores, dry cleaners, launderette, pharmacy, betting shop and hairdressers. Only 6% of the floorspace is attributed to takeaways which is relatively low compared to the other Large Neighbourhood Centres.

7.32 There are three vacant units within the Centre which amounts to 11% of floorspace. The level of vacancies has remained relatively stable since the 2010 Retail Study which identified two vacant units.



| The Oval | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | 4 | 23 |
| CTN/Off Licence | 2 | 10 |
| Comparison Goods | 4 | 17 |
| Charity Shops | | |
| Pharmacy | 1 | 3 |
| Opticians | | |
| Takeaways | 2 | 6 |
| Cafes/Restaurants | 1 | 3 |
| Bookeepers | 1 | 3 |
| Hairdressers/Beauticians | 2 | 6 |
| Other | 5 | 18 |
| Vacancies | 3 | 11 |
| TOTAL | 25 | 100 |

Source: Applied Planning Oct 2012

- **Strengths** – There is a diverse range of shops and supporting services which meet the needs of the community and to some extent the specialist needs of a wider population.
- **Weaknesses** – The internal nature of the centre creates an unwelcoming and potentially threatening environment.

7. Poplars

- 7.33 Poplars Neighbourhood Centre consists of a Sainsbury's superstore along with a pharmacy, take-way, and community facilities including a doctor's surgery. The size of the Sainsbury store results in the Poplars serving a much wider area than the immediate neighbourhood.



| The Poplars | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | 1 | 97 |
| CTN/Off Licence | | |
| Comparison Goods | | |
| Charity Shops | | |
| Pharmacy | 1 | 2 |
| Opticians | | |
| Takeaways | 1 | 1 |
| Cafes/Restaurants | | |
| Bookeepers | | |
| Hairdressers/Beauticians | | |
| Other | | |
| Vacancies | | |
| TOTAL | 1 | 100 |

Source: Applied Planning Oct 2012

- **Strengths** - Large superstore offers a choice a wide choice of goods for residents.
- **Weaknesses** – The superstore attracts trade from beyond the catchment area intended within the hierarchy of centres and diverts trade from other neighbourhood centres.

8. Canterbury Way

7.34 Canterbury Way is a Large Neighbourhood Centre located in the north eastern corner of Stevenage. The Centre is essentially a parade of shops which extend to 306 sq.m. gross and comprises of three units; a small Londis supermarket, Martin's CTN and a pharmacy. There are no vacant units.



| Canterbury Way | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | 1 | 34 |
| CTN/Off Licence | 1 | 38 |
| Comparison Goods | | |
| Charity Shops | | |
| Pharmacy | 1 | 27 |
| Opticians | | |
| Takeaways | | |
| Cafes/Restaurants | | |
| Bookeepers | | |
| Hairdressers/Beauticians | | |
| Other | | |
| Vacancies | | |
| TOTAL | 3 | 100 |

Source: Applied Planning Oct 2012

- **Strengths** – All the units are occupied and the Centre meets some of the day-to-day top-up shopping requirements of residents
- **Weaknesses** – The façade and canopy would benefit from refurbishment

9. Filey Close

7.35 Filey Close Large Neighbourhood Centre is located in the north east of Stevenage. The Centre comprises of five units which extend to 510 square metres gross. Occupiers of the Centre include a Co-operative foodstore, pharmacy, two takeaways and a vacant unit. Whilst the Centre provides a limited retail offer, it does meet some of the day-to-day top-up shopping needs of residents.



| Filey Close | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | 1 | 24 |
| CTN/Off Licence | | |
| Comparison Goods | | |
| Charity Shops | | |
| Pharmacy | 1 | 24 |
| Opticians | | |
| Takeaways | 2 | 29 |
| Cafes/Restaurants | | |
| Bookeepers | | |
| Hairdressers/Beauticians | | |
| Other | | |
| Vacancies | 1 | 24 |
| TOTAL | 5 | 100 |

Source: Applied Planning Oct 2012

7.36 Notably the two takeaway businesses have occupied two of the three units which were identified as vacant in the 2010 Retail Study. Whilst the takeaway units do not enhance the retail offer of the Centre, they provide a complementary use and have added vibrancy, and improved the appearance of the centre.

- **Strengths** – The number of vacant units in the Centre has decreased in recent years which has enhanced the appearance and vibrancy of the Centre.
- **Weaknesses** – The Centre has a limited retail offer.

10. Chells Manor

7.37 Chells Manor is a Large Neighbourhood Centre located in the north east of the town. The Centre is a recent development compared to other neighbourhood centres in Stevenage.



| Chells Manor | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | 1 | 32 |
| CTN/Off Licence | 1 | 23 |
| Comparison Goods | | |
| Charity Shops | | |
| Pharmacy | | |
| Opticians | | |
| Takeaways | 2 | 45 |
| Cafes/Restaurants | | |
| Bookeepers | | |
| Hairdressers/Beauticians | | |
| Other | | |
| Vacancies | | |
| TOTAL | 4 | 100 |

Source: Applied Planning Oct 2012

7.38 The Centre contains four units; a Costcutter, off licence and two take-aways, which provide approximately 310 sq.m. gross of floorspace. The occupiers have remained unchanged since the 2010 Retail Study survey. There is an adjacent public house with an underused car park to the rear of the shops.

- **Strengths** – This is a modern development which is in a better condition than some of the other neighbourhood centres. There are no vacant units.
- **Weaknesses** – The Centre has a limited retail offer. The layout of the Centre is poor in terms of maximising the visibility of retail frontages and their relationship with the area of car parking.

Small Neighbourhood Centres

1. Archer Road

- 7.39 Archer Road is a Small Neighbourhood Centre located to the north-east of the Town Centre. The Centre contains two units; a Londis convenience store and a pharmacy which provide approximately 300 sq.m. gross of floorspace. Three former units located between the occupied units have been bricked up indicating long-term low demand.



| Archer Road | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | 1 | 72 |
| CTN/Off Licence | | |
| Comparison Goods | | |
| Charity Shops | | |
| Pharmacy | 1 | 28 |
| Opticians | | |
| Takeaways | | |
| Cafes/Restaurants | | |
| Bookeepers | | |
| Hairdressers/Beauticians | | |
| Other | | |
| Vacancies | | |
| TOTAL | 2 | 100 |

Source: Applied Planning Oct 2012

- 7.40 The retail units face onto an internal rectangular shape and the entire Centre is not visible from the road which is likely to impact on footfall to the units. The Centre includes a car parking forecourt to the rear northern and eastern edges of the Centre with space for approximately 20-30 cars. The car park is poorly related to the retail units which creates an uncomfortable and potentially threatening environment.
- 7.41 There have been improvements to the public realm in recent years.

- **Strengths** – The Centre has a foodstore and pharmacy which meet some of the sq.m. top-up shopping needs of residents.
- **Weaknesses** – The Centre is not visible from the road and the car park is poorly related to the retail units.

2. Austen Paths

7.42 Austen Paths is a recent development consisting of only one convenience shop underneath flats. There is a lay by in front of the shop for two vehicles. The unit is approximately 150 sq.m. gross.



| Austen Paths | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | 1 | 100 |
| CTN/Off Licence | | |
| Comparison Goods | | |
| Charity Shops | | |
| Pharmacy | | |
| Opticians | | |
| Takeaways | | |
| Cafes/Restaurants | | |
| Bookeepers | | |
| Hairdressers/Beauticians | | |
| Other | | |
| Vacancies | | |
| TOTAL | 1 | 100 |

Source: Applied Planning Oct 2012

3. Burwell Road

- 7.43 Burwell Road is a Small Neighbourhood Centre located towards the south eastern quarter of Stevenage. The Centre comprises a parade of units which include a NISA convenience store, a CTN and provides approximately 352 sq.m. gross of floorspace. The Centre contains no vacant units. The retail parade fronts onto a small car park with space for approximately 14 cars.



| Burwell Road | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | 1 | 25 |
| CTN/Off Licence | 1 | 25 |
| Comparison Goods | | |
| Charity Shops | | |
| Pharmacy | | |
| Opticians | | |
| Takeaways | 2 | 50 |
| Cafes/Restaurants | | |
| Bookeepers | | |
| Hairdressers/Beauticians | | |
| Other | | |
| Vacancies | | |
| TOTAL | 4 | 100 |

Source: Applied Planning Oct 2012

- **Strengths** -The Centre is fully occupied and the shops meet some of the day-to-day top-up shopping needs of residents.
- **Weaknesses** - There is a limited choice of shops and 50% of the floorspace is dedicated to A5 uses.

4. Fairview Road

- 7.44 Fairview Road is classified as a Small Neighbourhood Centre and is located towards the north western corner of Stevenage. The Centre contains a convenience store and a vacant unit and extends to approximately 160 sq.m. gross. The vacant unit was previously a hairdressers and has become vacant since the 2010 Retail Study.



| Fairview Road | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | 1 | 69 |
| CTN/Off Licence | | |
| Comparison Goods | | |
| Charity Shops | | |
| Pharmacy | | |
| Opticians | | |
| Takeaways | | |
| Cafes/Restaurants | | |
| Bookeepers | | |
| Hairdressers/Beauticians | | |
| Other | | |
| Vacancies | 1 | 31 |
| TOTAL | 2 | 100 |

Source: Applied Planning Oct 2012

7.45 Car parking for the Centre is provided in a lay-by off Fairview Road which can accommodate approximately four cars.

- **Strengths** – The convenience store meets some of the day-to-day top-up shopping needs of residents
- **Weaknesses** – There is a lack of variety and choice

5. Hydean Way

- 7.46 Hydean Way is classified as a Small Neighbourhood Centre and comprises a parade of five units fronting onto a car park with approximately 17 spaces. The Centre is in good condition with generally attractive landscaping and facades. The Centre contains a Co-operative foodstore, two takeaways, a hairdressers and a vets and extends to approximately 540 sq.m. gross.



| Hydean Way | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | 1 | 33 |
| CTN/Off Licence | | |
| Comparison Goods | | |
| Charity Shops | | |
| Pharmacy | | |
| Opticians | | |
| Takeaways | 2 | 33 |
| Cafes/Restaurants | | |
| Bookeepers | | |
| Hairdressers/Beauticians | 1 | 17 |
| Other | 1 | 17 |
| Vacancies | | |
| TOTAL | 5 | 100 |

Source: Applied Planning Oct 2012

- **Strengths** - The Centre is fully occupied and the Co-operative sells a reasonable range of convenience items.
- **Weaknesses** – Four of the five units are occupied by non-retail tenants.

6. Kenilworth Close

- 7.47 Kenilworth Close Centre is a square brick block which comprises of four units and extends to approximately 306 sq.m. gross. Occupiers include a convenience store, a takeaway and a physiotherapy clinic. There is one vacant unit. The Centre is set back from the road and faces onto a forecourt car park with approximately 20 spaces.



| Kenilworth Close | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | 1 | 35 |
| CTN/Off Licence | | |
| Comparison Goods | | |
| Charity Shops | | |
| Pharmacy | | |
| Opticians | | |
| Takeaways | 1 | 15 |
| Cafes/Restaurants | | |
| Bookeepers | | |
| Hairdressers/Beauticians | | |
| Other | 1 | 35 |
| Vacancies | 1 | 15 |
| TOTAL | 4 | 100 |

Source: Applied Planning Oct 2012

- **Strengths** – The Centre meets some of the day-to-day top-up shopping needs of residents.
- **Weaknesses** – The Centre is dominated by non retail tenants

7. Lonsdale Road

- 7.48 Lonsdale Road is a Small Neighbourhood Centre which consists of two units, a CTN and a community use. The CTN is approximately 150 sq.m. gross. The shop and associated car parking is wholly removed from Lonsdale Road and footfall is likely to suffer as a consequence.



| Lonsdale Court | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | | |
| CTN/Off Licence | 1 | 50 |
| Comparison Goods | | |
| Charity Shops | | |
| Pharmacy | | |
| Opticians | | |
| Takeaways | | |
| Cafes/Restaurants | | |
| Bookeepers | | |
| Hairdressers/Beauticians | | |
| Other | 1 | 50 |
| Vacancies | | |
| TOTAL | 1 | 100 |

Source: Applied Planning Oct 2012

- **Strengths** – The CTN meets some of the day-to-day top-up shopping needs of residents.
- **Weaknesses** - There is a lack of choice and the centre is in a poor condition.

8. Mobbsbury Way

- 7.49 Mobbsbury Way is located in the north-east of Stevenage. The Centre comprises a parade of five units with flats above and fronts on to a lay by off Mobbsbury Way which provides parking for approximately 12 cars.



| Mobbsbury Way | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | 1 | 33 |
| CTN/Off Licence | | |
| Comparison Goods | | |
| Charity Shops | | |
| Pharmacy | | |
| Opticians | | |
| Takeaways | 1 | 17 |
| Cafes/Restaurants | | |
| Bookeepers | | |
| Hairdressers/Beauticians | 2 | 33 |
| Other | | |
| Vacancies | 1 | 17 |
| TOTAL | 5 | 100 |

Source: Applied Planning Oct 2012

- 7.50 The Centre extends to approximately 540 sq.m. gross and occupiers include a convenience store, a takeaway, a hair studio and beauty salon. There is one vacant unit.

- **Strengths** – The convenience stores meets some of the day-to-day top-up shopping needs of residents.
- **Weaknesses** – The Centre is dominated by non retail tenants.

9. Popple Way

- 7.51 Popple Way Small Neighbourhood Centre is located in the north east of Stevenage and is in close proximity to the Town Centre. The Centre comprises of a parade of units with flats above and bay parking for nine cars. The Centre contains six units and extends to 540 sq.m. gross. There are no Community or Health Centres associated with this Centre.



| Popple Way | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | 1 | 17 |
| CTN/Off Licence | 1 | 17 |
| Comparison Goods | | |
| Charity Shops | | |
| Pharmacy | | |
| Opticians | | |
| Takeaways | 1 | 17 |
| Cafes/Restaurants | | |
| Bookeepers | | |
| Hairdressers/Beauticians | 1 | 17 |
| Other | 1 | 17 |
| Vacancies | 1 | 17 |
| TOTAL | 6 | 100 |

Source: Applied Planning Oct 2012

- 7.52 Occupies include a CTN, a convenience store, a takeaway, a hairdressers and Stevenage Labour Party. There is also one vacant unit.

- **Strengths** – The Centre meets some of the day-to-day needs of residents.
- **Weaknesses** – The fascias and general appearance is of poor standard.

10. Rockingham Way

- 7.53 Rockingham Way Centre is located close to the centre of Stevenage and comprises of a parade of shops with flats above. The Centre fronts on to a lay by off Rockingham Way which provides parking for approximately 22 cars.



| Rockingham Way | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | 1 | 17 |
| CTN/Off Licence | 1 | 17 |
| Comparison Goods | 1 | 17 |
| Charity Shops | | |
| Pharmacy | | |
| Opticians | | |
| Takeaways | 2 | 33 |
| Cafes/Restaurants | | |
| Bookeepers | | |
| Hairdressers/Beauticians | 1 | 17 |
| Other | | |
| Vacancies | | |
| TOTAL | 6 | 100 |

Source: Applied Planning Oct 2012

- 7.54 The Centre contains six units and extends to approximately 450 sq.m. gross. Occupiers include a convenience store, CTN, carpet retailers, two takeaways and a hairdressers.

- **Strengths** – All the units are occupied and the Centre meets some of the day-to-day top-up shopping requirements of residents.
- **Weaknesses** – The fascias and general appearance is of a poor standard.

11. Roebuck

- 7.55 Roebuck Centre is located in the south of Stevenage. The Centre consists of a parade of shops with flats above. Off street car parking is provided for approximately 37 cars to the south of the parade.



| Roebuck | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | 1 | 20 |
| CTN/Off Licence | | |
| Comparison Goods | 1 | 20 |
| Charity Shops | | |
| Pharmacy | 1 | 10 |
| Opticians | | |
| Takeaways | | |
| Cafes/Restaurants | 1 | 10 |
| Bookeepers | | |
| Hairdressers/Beauticians | 2 | 20 |
| Other | | |
| Vacancies | 2 | 20 |
| TOTAL | 8 | 100 |

Source: Applied Planning Oct 2012

- 7.56 The Centre contains eight units and comprises of 650 sq.m. gross of floorspace and includes a One Stop convenience store, pharmacy, a bicycle shop, two hairdressers and a café. There are currently two vacant units, which is a reduction from the three which were recorded in the previous Retail Study. There are adjacent Community and Health Centres.

- **Strengths** – There are a range of shops and supporting uses which meet the day-to-day needs of residents.
- **Weaknesses** – There is a high proportion of vacant units.

12. Whitesmead Road

- 7.57 This consists of a single Londis Shop. There is a lay by in front of the shop for two vehicles. The unit is approximately 50 sq.m. gross.



| Whitesmead Road | Number of Units | Percentage of Floorspace |
|--------------------------|-----------------|--------------------------|
| Foodstore | 1 | 100 |
| CTN/Off Licence | | |
| Comparison Goods | | |
| Charity Shops | | |
| Pharmacy | | |
| Opticians | | |
| Takeaways | | |
| Cafes/Restaurants | | |
| Bookeepers | | |
| Hairdressers/Beauticians | | |
| Other | | |
| Vacancies | | |
| TOTAL | 1 | 100 |

Source: Applied Planning Oct 2012

- 7.58 Further descriptive and background information on Old Town and the Local Centres is contained in the Council's 2007 Neighbourhood Renewal Study commissioned from the Matrix Partnership.

8 MARKET RESEARCH

8.1 CACI commissioned in-centre surveys in order to more fully understand shopper's habits in the catchment area. The surveys were carried out during the week commencing 12th November 2012 in Stevenage Town Centre (403 interviews), Old Town (72), Roaring Meg Retail Park (103), Hitchin (86), and Letchworth (67).

8.2 These are the main findings of the surveys, the full results are contained in the CACI Report:

- 85.6% of respondents visiting Stevenage live within the Primary Catchment Area (PCA)
- The majority of respondents live in the less affluent areas in and around Stevenage
- Stevenage attracts a higher proportion of less affluent groups than are represented in the catchment area as a whole
- The combined Stevenage centres attract a greater proportion of the more affluent ACORN groups
- The Town Centre attracts older female shoppers
- On average, shoppers in the Town Centre stay for 75 minutes compared to 107 minutes for Hitchin
- 70% of respondents visit the Town Centre at least once a week. This is considered exceptionally high
- Those shopping most regularly fall within the less affluent groups
- 44% travelled to the centre by car, 30% by bus, 20% walked and 4% came by train
- Wealthy Achievers arrive by car, Moderate Means by bus and Hard Pressed walked
- 40% were shopping for non-grocery items. In Hitchin this figure was 47%
- Linked trips to Old Town and the Retail Parks are rare, but 38% of those questioned at Roaring Meg planned to visit the Town Centre
- Tesco, Primark and the Westgate Centre were the main destinations in Stevenage Town Centre
- 75.7% of respondents made a purchase in the Town Centre and 41.7% visited catering outlets
- Personal Safety was seen as the greatest strength of the Town Centre whilst the cost of car parking was the greatest perceived problem. The choice of shops and general atmosphere also scored poorly
- Improving the quality and number of shops would encourage respondents to visit more regularly

9 RETAIL ASSESSMENT AND CAPACITY PROJECTIONS

- 9.1 NPPF states that local authorities should use their evidence base to assess the needs for land and floorspace, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including retail.
- 9.2 Accordingly, this Section establishes the need for additional retail floorspace in Stevenage. We have established the current performance of the Town Centre, Retail Parks and supermarkets/superstores and used this as a basis for forecasting the need for further retail floorspace over the plan period up to 2031. The quantitative analysis statistical tables accompanying this assessment are attached at Appendices 1 and 2.
- 9.3 We have used a step-by-step methodology which is underpinned by CACI's Retail Footprint and Provision models for comparison goods and convenience goods respectively. In the analysis which follows we have used the following step-by-step approach:
- Step 1: Establish the geographical area from which the centre or store attracts trade. This hereinafter is the catchment area and is identified by CACI's Retail Footprint and ProVision models;
 - Step 2: Identify the proportion of trade which the centre or store attracts from each postcode sector in the catchment area. Again, this is established through Retail Footprint and ProVision;
 - Step 3: Calculate the current (2012) population and available expenditure in each postcode sector and through Step 2 identify the expenditure flows from the postcode sector to each centre or store;
 - Step 4: Assess the growth in available expenditure in each postcode sector over the plan period and identify quantitative need using a constant market share approach; and
 - Stage 5: Where appropriate, undertake scenario modelling and assess how commitments and other interventions affect market shares and in turn quantitative need over the plan period.
- 9.4 The detailed parameters and assumptions for both the comparison and convenience assessment are set out below.

Comparison Goods Analysis

Catchment Area

- 9.5 To estimate residential catchment, market shares and hence centre turnover, CACI have employed their Retail Footprint Model, which models resident's choice of location for comparison goods shopping, based on factors such as the attractiveness of the centre, relative distance to centres and strength of competing centres.
- 9.6 To calibrate Retail Footprint and ensure the model is underpinned by the most up-to-date information available, CACI also commissioned 731 on street surveys in Stevenage Town Centre, Roaring Meg Retail Park, Stevenage Old Town and Letchworth. The headline results of this survey are contained in Section 7 of this Study.
- 9.7 The catchment area of Stevenage Town Centre is shown on Fig. 1 on Page 15 of this Study. The modelled retail catchment is broken down into four sub-catchment areas. The Primary Catchment Area is defined by where the first 50% of shoppers come from. The Secondary Catchment is defined by where the next 25% of shoppers come from. Tertiary and Quaternary catchments are similarly defined, representing where the next 15% and final 10% of shoppers come from.
- 9.8 The combination of the Primary and Secondary Catchments is referred to as the Core Catchment Area. This area represents where 75% of a centre's spend comes from. The combination of the Primary, Secondary and Tertiary catchments is referred to as the Major Catchment Area. This area represents where the majority (90%) of a centre's spend comes from.
- 9.9 Due to the definition of these areas at Postcode Sector level, the actual proportion of shoppers coming from any particular sub-catchment may vary slightly, with the cut-off marks as close to the targets of 50%, 25%, 15% and 10% as possible.
- 9.10 Retail Footprint provides information on the estimated market share of resident-based spend that a centre achieves by postcode sector.
- 9.11 By multiplying market share within each postcode sector by resident based spend on comparison goods, and adding up this component across all postcode sectors, the model calculates an estimate of spend attributable to each centre. This is referred to as the Market Potential of each centre.
- 9.12 Catchment analysis is also useful to understand where and who the centre's potential resident-based shoppers are, and what choices they have to shop in relation to the centre being analysed.

Population

- 9.13 Table 1, Appendix 1 sets out the population estimates for each postcode in the catchment area in 2012, 2013, 2016, 2021, 2026 and 2031. The information has been provided by CACI and is based on the 2001 Census of Population and household counts for 2001 at unit postcode level, and detail information on 2001 population and household characteristics at Census Output Area Level.
- 9.14 Population projections are based on the 2010 Mid-Year Estimates provided by the Office for National Statistics. The projections are based on statistics including age and sex and observed trends in fertility, mortality and migration.
- 9.15 On the basis of the 2010 Mid-Year Estimates the population of the catchment area is projected to increase by 17.2% over the plan period from 1,307,912 in 2012 to 1,532,870 in 2031.
- 9.16 Given the particular circumstances of Stevenage and its hinterland in delivering housing to accommodate population growth, where appropriate we have modelled alternative scenarios which identify the effects on retail need if it does not prove possible to house the increase in population within the originating catchment areas.

Available Comparison Goods Expenditure

- 9.17 Table 4 Appendix 1 sets out the available retail expenditure in each postcode within the catchment in 2012. The 2012 local expenditure estimates are provided by CACI and produced in collaboration with Cambridge Econometrics. Local Area spend at the product group level is split down into detail product lines based upon a model using ACORN. Retail Footprint automatically deducts Special Forms of Trading. Further information is contained in the Retail Footprint User Guide included as Appendix 3.
- 9.18 Projections in levels of spend from the 2012 base year are undertaken at regional level and based on the East of England trend from the *Regionalised Cambridge Multisectoral Dynamic Model of the UK Economy* (Regionalised MDM).
- 9.19 Table 5 sets out the growth in available comparison goods expenditure in the catchment up to 2031. The available comparison goods expenditure within the catchment area is projected to increase by 72% between 2012 to 2031 from £2,753.9m to £4,762.0m.

Market Potential

- 9.20 Table 5 Appendix 1 also provides the total available comparison goods expenditure in all the postcodes zones in the catchment area. However not all of this expenditure is available to Stevenage shops. CACI's Retail Footprint takes the total amount of spend which is available in an area and calculates what proportion of that spend could flow into each centre. This is described in the Retail Footprint User Guide (Appendix 3).

- 9.21 The outputs of the Retail Footprint Model are set out in Table 6 Appendix 1 which clearly identifies the market potential trade draw to Stevenage Town Centre from each postcode in the catchment area at 2012, 2013, 2016, 2021, 2026 and 2031.
- 9.22 It is demonstrated that over the plan period the turnover potential of Stevenage increases by £150m from £214m to £364m.

Turnover of Stevenage Town Centre in 2012

- 9.23 Using CACI's Retail Footprint, Table 6 Appendix 1 identifies the proportion of available expenditure within each postcode area which is attracted to Stevenage Town Centre.
- 9.24 The Retail Footprint model calculates that the 'market potential expenditure' of Stevenage is £213.87m from residents in 2012 which amounts to 7.77% of available expenditure in the catchment area as shown in Table 1 on Page 14 of this Study. As explained in paragraph 3.11, CACI advise that a 40% 'market potential' to 'turnover' conversion rate should be used which results in a resident derived turnover of Stevenage in 2012 of £85.55m.
- 9.25 In addition to resident expenditure, CACI advise that comparison retailers in Stevenage Town Centre attract £3m from tourists and £3.5m from workers in 2012.
- 9.26 On this basis, the turnover of existing comparison goods floorspace in 2012 is £92.05m.

Stevenage Floorspace and Trading Density

- 9.27 Trading density is the amount of turnover per sq.m. of trading floorspace. Benchmark, or company average, trading densities are derived from Mintel's Retail Rankings. These figures are used to assess the trading density of a centre by using a typical 'basket' of values. Reflecting Stevenage's role in the retail hierarchy, we would expect the centre to achieve a benchmark trading density of £5,000 (including adjustment for VAT) per sq.m. in the 2012 base year.
- 9.28 As set out in the Stevenage Health Check in Chapter 3 there is 26,968 sq.m. net of comparison goods floorspace in Stevenage Town Centre. On this basis, the trading density of comparison goods floorspace in Stevenage Town Centre is calculated at £3,413 sq.m. in 2012. All trading densities are inclusive of VAT.
- 9.29 This is a very low trading density for a centre of this size and in this instance we recommend that any additional expenditure which is generated as a result of population increase, increases in spending per capita or improved penetration of the town's natural catchment area should, in the first instance, be used to boost the trading position of existing floorspace rather than being translated into new floorspace. Therefore our analysis is based on achieving an overall trading density of £5,000/sq m, allowing for increases in trading efficiency, over the plan period and, on this basis there is no need for new comparison goods floorspace before 2026.

Capacity Analysis

9.30 We have modelled three scenarios:

- Scenario 1: No competing commitments implemented. Maintain expenditure attraction at 2012 levels;
- Scenario 2: All commitments implemented by 2017. Constant expenditure attraction at 2017 levels; and
- Scenario 3: Achieve CACI recommended retail mix and maintain market share (all commitments implemented by 2017)

Scenario 1: No competing commitments implemented. Maintain expenditure attraction at 2012 levels

9.31 Scenario 1 provides the baseline position. The scenario assumes that there is no development in Stevenage, or improvement in the retail mix. The scenario solely models the effects of population change, increase in expenditure per capita and changes in retail efficiency over the plan period. The scenario assumes that no commitments in competing centres are implemented.

9.32 This scenario assumes that Stevenage Town Centre continues to attract a constant percentage of available expenditure from each postcode sector up to 2031, as identified by Retail Footprint in 2012. Table 7 Appendix 1 sets out the projected turnover in Stevenage Town Centre solely modelling the effects of population changes and an increase in expenditure per capita.

9.33 Due to the fact that Stevenage Town Centre attracts a lower proportion of expenditure from those postcode sectors which benefit from the largest increases in available expenditure over then plan period, it is evident that in this scenario the market share which Stevenage attracts from the catchment declines even though Stevenage continues to attract a constant percentage of trade from each postcode sector.

9.34 In Scenario 1 the 'market potential' of Stevenage increases from £213.87m in 2012 to £363.99m in 2031, equating to a 70% increase in resident derived turnover from £85.55m in 2012 to £145.60m in 2031. When accounting for tourism and worker derived expenditure, the turnover of Stevenage is set to increase from £92.05m in 2012 to £155.17m in 2031. This is the expenditure which is available to support new floorspace.

9.35 By applying a target benchmark trading density of £5,000 sq.m. throughout the plan period there is no need for new comparison goods floorspace in this scenario until after 2021. There is a small need for 196 sq.m. net by 2026 increasing to 4,066 sq.m. by 2031.

9.36 This scenario represents the 'do-nothing' baseline situation and we do not recommend that the floorspace requirements are implemented.

Scenario 2: All commitments implemented by 2017. Constant expenditure attraction at 2017 levels

9.37 This scenario assumes that the following commitments are delivered by 2017:

- Biggleswade Retail Park, London Road 2,288 sq.m. GLA (opening date 2014)
- Hatfield Town Centre Redevelopment, 8,042 sq.m. GLA (opening date 2015)
- Grosvenor Centre Extension, Northampton 42,734 sq.m. GLA (opening date 2017)

The effects of these commitments are aggregated in the Retail Footprint model.

9.38 We are aware that there is a commitments at Roaring Meg Retail Park of 527 sq.m. where open as well as bulky goods commitments at London Road of 3,659 sq.m. CACI's Retail Footprint Model is not designed to model goods sensitive changes at this scale and therefore the commitments have been excluded from analysis at this stage. Instead this scenario provides an indication of the potential impact on Stevenage Town Centre resulting from pipeline developments in Biggleswade, Hatfield and Northampton.

9.39 The scenario assumes that any effects of these trade diversions are realised by 2017 and the effects are modelled by CACI's Retail Footprint model. Once the trade diversion arising from the commitments are modelled, this scenario assumes that Stevenage Town Centre continues to attract a constant percentage of available expenditure from each postcode sector up to 2031 from a 2017 base year as the available expenditure in each postcode increases.

9.40 Again, as Stevenage Town Centre attracts a lower proportion of expenditure from those postcode sectors which benefit from the largest increases in available expenditure over then plan period, it is evident that the market share which Stevenage attracts from the catchment declines even though Stevenage continues to attract a constant percentage of trade from each postcode sector.

9.41 Table 8 Appendix 1 sets out the projected turnover of Stevenage Town Centre in Scenario 2. The Table demonstrates that as a result of the trade diversion arising from commitments the turnover of Stevenage Town Centre increases from £92.05m in 2012 to £105.91m in 2017 (compared to £106.2m in the base scenario) and consequently the percentage of available resident expenditure which is apportioned to Stevenage Town Centre decreases from 7.77% in 2012 to 7.69% in 2017.

9.42 The Table demonstrates that the resident derived turnover of Stevenage Town Centre increases from £85.55m in 2017 to £145.16m in 2031. When allowing for tourism and worker derived expenditure the turnover of Stevenage Town Centre is set to increase from £92.05m to £154.73m (68%).

9.43 Applying a target benchmark trading density of £5,000 sq.m. throughout the plan period there is no quantitative need for new comparison goods floorspace in this

scenario up to 2021, by 2026 there is a quantitative need for 119 sq m rising to 3,979 sq.m. net of floorspace by 2031.

Scenario 3: Achieve CACI recommended retail mix and maintain market share (all commitments implemented by 2017)

- 9.44 In Part 2 of this Study CACI Retail Footprint models an uplift scenario which assesses the potential for Stevenage Town Centre to improve its market share. This scenario assumes that the three pipeline schemes are implemented but also assumes that the retail offer in Stevenage is improved. To calculate the uplift in attractiveness score in Stevenage Town Centre CACI have assumed that the top 10 'missing' brands from the gap analysis are attracted to Stevenage and replace independent retailers on Queensway. This increases Stevenage's Retail Footprint score from 741 to 840, an increase of 13%.
- 9.45 The brands which have been included in the Retail Footprint model are H&M, Debenhams, Monsoon, Warehouse, Republic, Superdry, Build A Bear, Oasis, The Entertainer and Phase 8. CACI do not expect these exact retailers to be attracted to Stevenage, but the scenario demonstrates the beneficial effects if the Town Centre retail mix is achieved.
- 9.46 CACI conclude that if the retail mix is improved in Stevenage Town Centre then the centre will become more attractive to some of the middle income and affluent shopping groups who are currently choosing not to shop in Stevenage. As shown on the map below, in this scenario Stevenage will penetrate deeper into its core catchment and increase market shares in the critical area around Hitchin.
- 9.47 As the CACI Retail Footprint scenario discounts the effects of population and expenditure growth, to isolate the effects of the potential uplift in turnover the uplift is applied to the 2012 base year. However it should be noted that any such uplift would be unlikely to be achieved until circa 2017.
- 9.48 In the 2012 base year this scenario assumes that Resident Market Potential penetration rate increases from 7.77% to 8.50%. The scenario assumes that Stevenage Town Centre is able to maintain this penetration rate over the plan period.
- 9.49 Table 9 Appendix 1 sets out the projected turnover in Stevenage Town Centre in Scenario 3. In 2017, it is demonstrated that the turnover of Stevenage Town Centre would be £116.32m, which would deliver a trading density of £4,313 sq.m.

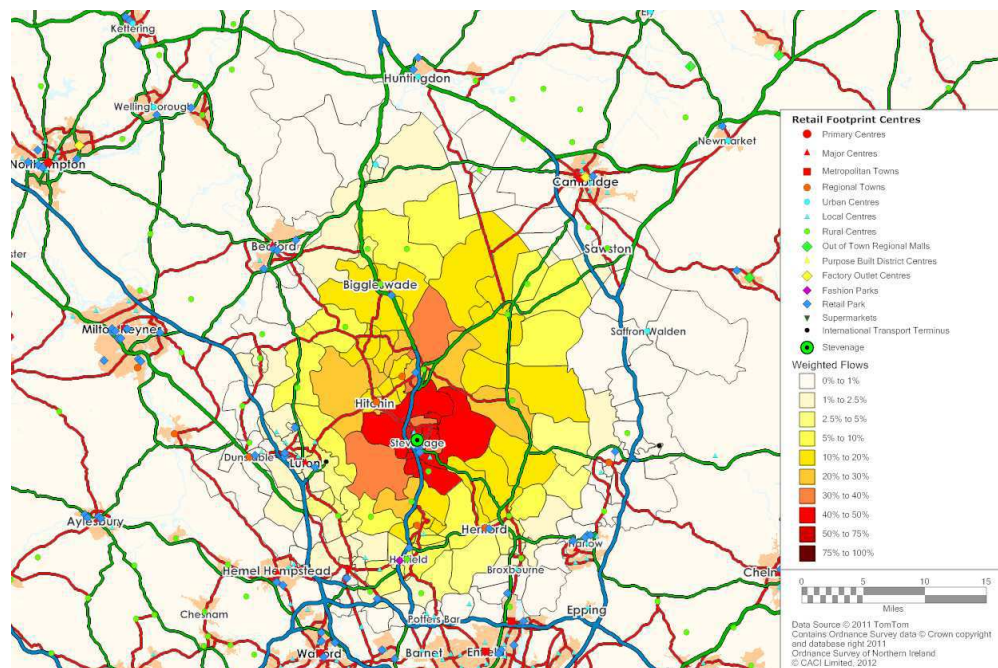


Fig 9: Scenario 3 Catchment Area Source: CACI Retail Footprint

- 9.50 The trading density is less than the benchmark trading of £5,000 sq.m. and indicates that the retail mix of Stevenage should be delivered through the utilisation of existing floorspace and not through the delivery of new floorspace which would further undermine the trading position and hence the vitality of the centre. Instead the growth in expenditure should be channelled into supporting the viability of existing retailers and enhancing the overall quality of the offer.
- 9.51 No need is identified up to 2021 for additional comparison good floorspace. By 2026 there is a need for 3,007 sq.m. rising to 7,343 sq.m. net by 2031.
- 9.52 This is an aspirational scenario given the difficulties in actually attracting these major brands identified by CACI taking in to account the current retail profile of the town. Should the Council be successful in delivering a regeneration strategy for the Town Centre then there would be an actual quantitative need post 2021.

Comparison Capacity Analysis Conclusions

- 9.53 Scenario 2 assesses the trading position of Stevenage post commitments and we are of the opinion that this scenario should provide the baseline situation for planning policy floorspace allocations. Up to 2026, we are of the opinion that increased available spending should primarily be used to improve the retail efficiency of existing floorspace. On this basis, there is no quantitative need for additional comparison goods floorspace across the whole of Stevenage Borough up to 2026, by 2031 there is a quantitative need for 3,979 sq m net of floorspace. This is very much lower than the floorspace that was being proposed by ING/Stanhope and is indicative of the reduction in projected population growth in the catchment area which largely underpinned those proposals.

- 9.54 However, there is a case for a qualitative improvement of floorspace in the Town Centre and, ideally, this should be achieved through the redevelopment or refurbishment of existing floorspace. We are of the opinion that the Council should seek through the Plan-making process to facilitate where possible the enhancement of secondary areas in the Town Centre such as the Market Hall and the area around the Bus Station.
- 9.55 Our view is that a redevelopment of part of the centre to provide better retail floorspace and retail environment would be preferable to an extension to the existing retail area. Additional floorspace could be entertained if the scheme would be clearly supported by new spending attracted to the town.
- 9.56 The centre should be protected from further competition from out-of-centre stores and any new floorspace should be located in or adjacent to the Town Centre.

Convenience Goods Analysis

Catchment Area

- 9.57 To estimate resident catchment, market shares and turnover of convenience stores CACI have employed their ProVision Model. ProVision creates realistic, overlapping catchments reflecting the local road network, the location and strength of competing stores, store fascia, size, drive time and shopper demographics. The Provision 2012 User Guide is included in Appendix 4 of this Study.
- 9.58 ProVision provides the estimated market share which each store attracts for each Output Area. This is set out in a supplementary technical document. By multiplying the market share within each postcode sector by resident based spend on convenience goods, and adding up the components across all Output Areas, the model calculates the spend attributable to each store.

Population

- 9.59 Base population data and projections for each store's catchment area has been provided by CACI. The methodology for these projections is set out in paragraphs 8.13 onwards.

Available Expenditure

- 9.60 The available expenditure in the catchment area of each store is set out in a supplementary technical document. The 2012 local expenditure estimates have been provided by CACI and produced in collaboration with Cambridge Econometrics. The expenditure per capita data excludes special forms of trading which is deducted at 3.9% in 2012 and throughout the Study period. This reflects the fact that convenience on-line shopping is still sourced from stores in the catchment area as opposed to comparison on-line shopping which is usually supplied from remote warehouses.

- 9.61 Projections in levels of spend from the 2012 base year are undertaken at regional level and based on the East of England trend from the *Regionalised Cambridge Multisectoral Dynamic Model of the UK Economy* (Regionalised MDM).

Turnover of Convenience Stores

- 9.62 ProVision identifies the proportion of available expenditure within each Output Area which is attracted to each store in the 2012 base year. The turnover of each store is projected forward assuming that each store attracts a constant market share from each Output Area. This is shown in a supplementary technical document and summarised in Table 1 Appendix 2.

Aggregated Turnover of Stores

- 9.63 To ascertain the need for additional convenience goods floorspace across Stevenage it is necessary to aggregate the turnover of all stores. Table 1 Appendix 2 identifies that the aggregated annual convenience turnover of all convenience stores in Stevenage is estimated to be £233.39m in 2012. Assuming that all the individual stores maintain market share, the aggregated annual turnover of the stores is calculated to increase to £324.30m by 2031.

Floorspace and Trading Density

- 9.64 Trading density is the amount of turnover per sq.m. of trading floorspace. Benchmark, or company average, trading densities are derived from Mintel's Retail Rankings. These figures are used to assess the trading density of a centre by using a typical 'basket' of values. Having regard to the range of convenience operators within Stevenage, we would expect a benchmark trading density of £10,000 per sq.m. in the 2012 base year.
- 9.65 As calculated in Table 1 Appendix 2 there is 23,388 sq.m. net of convenience goods floorspace in Stevenage. On this basis, the trading density of convenience goods floorspace is calculated at £9,979 sq.m. in 2012. This demonstrates that in the 2012 base year that collectively convenience stores in Stevenage are marginally undertrading i.e. there is a surplus of convenience floorspace to meet current needs.
- 9.66 As the convenience trading density of stores in Stevenage is already at benchmark, the current trading density of £10,000 sq.m. should increase as retail efficiency increases. Retail efficiency relates to expected improvements to the trading density in the future as retailers benefit from growth in spending and sell more goods or higher value goods from the same floorspace. We have adopted the advice from Experian Retail Planner Briefing Note 9 (September 2011) in the case of convenience goods which estimates that retail efficiency will increase by 0.4% per annum up to 2017 and 0.2% thereafter.
- 9.67 It is demonstrated in Table 2 Appendix 2 that the benchmark trading density for convenience goods in Stevenage increases to £10,491 per sq.m. by 2031.

Projected increase in turnover and retail capacity (Baseline)

- 9.68 Table 2 Appendix 2 sets out the increase in aggregated annual convenience store turnover up to 2031 and demonstrates that turnover will increase from £233.39 in 2012 to £324.30m by 2031. This translates in to a residual convenience goods expenditure deficit of £0.5m in 2012 becoming a convenience goods capacity to support new floorspace of £78.93m by 2031. This increase is largely attributable to CACI's projected expenditure growth rates post 2021.
- 9.69 If this floorspace is delivered in a supermarket format operating at circa £12,000 sq.m. in the 2012 base year we estimate that there is no surplus convenience goods capacity in 2012 but by 2016 there is a convenience goods capacity for an additional 535 sq.m. increasing to 6,270 sq.m. by 2031.

Projected increase in turnover and retail capacity (Reduced Population Growth)

- 9.70 Given the particular circumstances of Stevenage and it's hinterland in delivering housing to accommodate population growth, we have also modelled a scenario alternative whereby only 50% of the ONS population growth within the catchment as a whole is achieved. This is shown in Table 3 Appendix 2.
- 9.71 In this scenario we estimate that there is sufficient convenience goods capacity to support an additional 268 sq.m. net in 2016 increasing to 5,954 sq.m. net by 2031 assuming the floorspace is delivered in a supermarket format.

10 CONCLUSIONS AND POLICY RECOMMENDATIONS

Stevenage Town Centre

- 10.1 All towns have their own characteristics but Stevenage is unique due primarily to the design and character of the Town Centre and the demographic make-up of the Borough. The rigid and unfashionable design, layout and character of the Town Centre diminishes its attractiveness.
- 10.2 The Town Centre requires some rejuvenation and recognition that that public realm and shopping environment is not aligned to the demands of modern day shoppers. There is a requirement to improve the quality of some of the peripheral car parks which are often the first impression of the Town Centre. It is suggested that these are reviewed in terms of space provision (particularly for family groups) and pricing policy.
- 10.3 There is also a requirement to invest in the public realm and investment in hard and soft landscaping and improvements. It is considered critical that the council considers a protected budget for on-going maintenance and enhancement of the Town Centre environment. Should any out-of-centre development be permitted for whatever reason we would recommend that the Council seek contributions through Section 106 agreements which could be used to further improve the town centre and in so doing ameliorate and negative effects that such a development may have on vitality and viability.
- 10.4 Nevertheless the Town Centre appears to be quite healthy as evidenced by relatively low vacancy rates. For comparison goods, the Town Centre is dominated by mid-range and value retailers and this largely meets the needs of the bulk of the town's population.
- 10.5 Stevenage has a modern market hall but this is poorly located and surrounded by service roads. We believe that this is an underutilised asset and could be promoted possibly in conjunction with occasional use of the Town Square and wide precincts to develop a niche retail attraction and to introduce an element of interest to the Town Centre.
- 10.6 Car ownership in Stevenage is above the national average and therefore a high proportion of this expenditure is 'mobile'. In other words expenditure could be lost if a competing centre could provide a more attractive offer taking in to account, distance, retail mix and other factors such as a more attractive shopping environment. However, as the Town Centre offers the type of shopping demanded by much of the town's population and competing centres are not targeting this market, one could take the view that the current penetration rates of the PCA will be resilient to change.
- 10.7 By the same token, Stevenage's penetration rates into the remainder of its catchment area are low indicating that shoppers who would normally be expected to gravitate towards Stevenage are choosing to shop in other centres. This

equilibrium is unlikely to change without a significant change in the town's retail profile and in turn, that is unlikely to happen without a significant amount of new residential development close to Stevenage which would bring about an increase in demand for that type of retail. In both cases a critical mass in terms of new shops and resident population would have to be achieved. The current strategic planning perspective is that only sufficient new housing land will be allocated to cater for the town's natural growth.

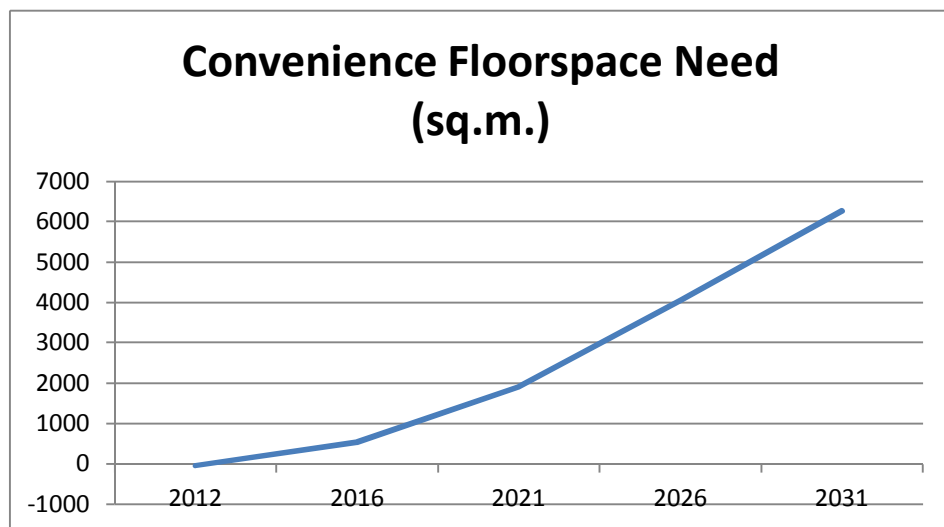
- 10.8 We are of the opinion that increased available spending should primarily be used to improve the retail efficiency of existing floorspace. There is no quantitative need for additional comparison goods floorspace across the whole of Stevenage Borough until 2026 and by 2031 there is a quantitative need for 3,979 sq m net of floorspace.
- 10.9 However, there is a case for a qualitative improvement of floorspace in the Town Centre and, ideally, this should be achieved through the redevelopment or refurbishment of existing floorspace. We are of the opinion that the Council should seek through the Plan-making process to facilitate where possible the enhancement of secondary areas in the Town Centre such as the Market Hall and the area around the Bus Station.
- 10.10 Whilst the Study does not identify a short term quantitative need for additional comparison goods floorspace across the Borough, we are of the opinion that there is a qualitative need to enhance the Town Centre. Our view is that a redevelopment of part of the centre to provide better retail floorspace and retail environment would be preferable to an extension to the existing town. Additional floorspace could be entertained if the scheme would be clearly supported by new spending attracted to the town.

Out-of-Centre Floorspace

- 10.11 Stevenage already has a well developed out-of-centre comparison goods offer. We see no need to allow for additional out-of-centre comparison goods floorspace other than perhaps as an ancillary element should the Council be minded to approve an additional convenience based superstore during the plan period. The Council should also manage the existing portfolio of out-of-centre space by resisting any proposals to relax or remove conditions controlling the types of goods that can be sold from any existing units. It is the case that in many parts of the country bulky goods units have become vacant due to the effects of the recession and owners are seeking relaxation of user conditions in order to relet the units. The danger is that if the stock of bulky goods units are diminished that pressure could grow for new bulky goods floorspace once the recession ends.

Convenience Goods Need

- 10.12 With regards to convenience shopping our analysis shows that there is a current surplus of floorspace of 41 sq.m. rising to a need for an additional 525 sq.m. in 2016 and 6,270 sq.m. by the end of the plan period. The Council is under an obligation to plan positively for this need which requires a policy as to how this floorspace should be distributed and the necessary allocations made through the Local Plan process.



- 10.13 If this need were to be provided by a single superstore the required floorspace would be 6,270 sq.m. which rises to 7,838 sq.m. of trading floorspace allowing for up to 20% of floorspace being devoted to ancillary comparison goods.
- 10.14 However we are of the view that at least 20% of the need is reserved to allow for extensions to existing convenience stores particularly in Local Centres where the provision of local services should be preserved and strengthened. This would reduce the maximum size of a single new superstore to 6,270 sq.m. of which no more than 1,254 should be devoted to comparison goods.
- 10.15 Given the fact that there is no current need for additional floorspace, the timing of any new development, allowing for construction and trading establishment, is of paramount importance. Based on the above graph, it is our view that any new major superstore should not be trading before 2026 and priority should be given to safeguarding and strengthening the Local Centres.
- 10.16 We are of the opinion that the local planning authority should plan positively for this identified need and allocate a site in the emerging Local Plan. Whilst the need for a new superstore is not identified until 2026, it is the case that the lead in time for a proposal of this nature can be significant. In order for a superstore to be operational by 2026, we are of the view that the local planning authority should seek to be entertaining applications by 2021.

- 10.17 However, if a plan-led superstore is delivered with qualitative benefits prior 2026, as part of a new or enhanced District Centre incorporating a range of unit shops and community facilities, this is not necessarily a cause for concern as the majority of any impact will fall on non-protected out-of-centre stores.
- 10.18 Whilst a new superstore would essentially draw its trade from existing superstores some of these stores (Tesco Extra, Waitrose and Sainsbury, Magpie Crescent) are in the town, district or neighbourhood centres and the impact on these stores would need to be assessed as part of any new proposal. Possibly more important would be the potential effects on neighbouring Local Centres and it may also be beneficial if any new superstore provided the basis for a new or replacement Local Centre which could incorporate additional small unit shops for other local shops as well as community facilities. Clearly any new development of this size would have to be well located in relation to the town's principal highway network as well as maximising access for the local community.
- 10.19 We recommend that when considering potential sites, the local authority should have regard to qualitative requirements to ensure that there is a more even geographic distribution of superstores across the borough. It is notable that the existing superstores in Stevenage are predominantly located in the west of the Borough and therefore to minimise overall travel distances for residents, we recommend that the local authority consider potential sites in the east of Stevenage.

Old Town

- 10.20 Old Town serves the immediate community primarily for convenience shopping as well as a wider catchment drawn by the bars and restaurants and retail offer that is not otherwise available in Stevenage. Our overall conclusion is that Old Town is very healthy in retail terms but we see no evidence of a qualitative or quantitative need to allocate new retail floorspace.

Centre Hierarchy

- 10.21 With regards to the Local Centres, it is the case that the majority were planned in the 1950s and 1960s and the number and size of unit shops reflect an era when retailing was not dominated by superstores which sell a comprehensive range of goods. The parades of shops would once have accommodated a number of convenience retailers; a bakers, butchers, an off-license etc. Now many of these specialised retailers have succumbed to pressures from the supermarkets resulting in either vacant uses or businesses that are marginally viable and who do not add greatly to the retail quality of these centres. This maybe evidenced by poor quality shop fronts, displays and fascias and shops that have limited opening hours.
- 10.22 Some centres have a large representation of hot food take-aways many of which only trade in the evenings with security shutters during normal retail hours which detract markedly from the quality of the centre. Equally, many convenience stores are operating from units that are too small to allow for a good range of products to

be sold in a modern retail environment. Consequently many of these centres are providing a less than ideal level of service. Whilst this is a common problem in most towns it is heightened in Stevenage due to the relatively large number of Local Centres constructed during this period.

- 10.23 A modern District or Local Centre should be anchored by a convenience store of reasonable size of say 500sq.m. gross to allow for a butchery counter, in-store bakery and a good selection of fruit and vegetables as well as the usual grocery products. Associated with this would be a limited number of shops housing typically a hairdressers, hot food take away, pharmacy, post office and maybe a bookmakers. The shops would be well located near to other facilities such as school, public house, health and community centres served by good parking provision and bus services. Many of Stevenage's Local Centres have had improvements in the form of new canopies, seating and planting areas. Whilst this may ameliorate the problems it does not address the fundamental imbalance in the stock of premises. Unfortunately it is very expensive and in many cases impractical to completely remodel existing centres and the existing pattern of provision is likely to persist over the plan period.
- 10.24 As part of this exercise we also recommend that the Council undertake a thorough assessment of all District and Local Centres and seek to implement a long-term improvement strategy based on the potential future role of the centres taking in to account viability and the delivery of local services. This may involve some rationalisation and refurbishment or redevelopment to provide a network of centres anchored on a supermarket and incorporating a range of local shops and services commensurate which could be supported by the local communities.
- 10.25 We are of the view that existing convenience stores should be given some measure of protection and that changes of use should be resisted unless it can be clearly demonstrated that continued use would be unviable over a period of time. We would also suggest that extensions to existing convenience stores in the Local Centres should be encouraged as long as community facilities such as public houses are not displaced.
- 10.26 We have reviewed the hierarchy of centres as described in the District Plan. We are of the view the designations are in need of review and would suggest that Stevenage Town Centre and Old Town require individual designations and policies which recognise their separate Borough wide roles.
- 10.27 Old Town is very healthy in retail terms but we see no evidence of a qualitative or quantitative need to allocate new retail floorspace. We also consider that the Poplars should be differentiated because of the wide catchment area that the Sainsburys store achieves and the fact that it is a 'centre' rather than a free standing out-of-centre store because of the pharmacy and community uses.
- 10.28 We also consider that some of the other designations need to be reviewed as some 'Large' Neighbourhood Centres are limited and some 'Small Neighbourhood Centres' are single stores or have a very limited role in the retail hierarchy. The following Table sets out our suggested new designations.

| Centre | District Plan Designation | Suggested Designation |
|------------------|----------------------------------|------------------------------|
| Town Centre | | Town Centre |
| Old Town | Large Neighbourhood Centre | Major Centre |
| Bedwell Crescent | Large Neighbourhood Centre | Large Neighbourhood Centre |
| The Glebe | Large Neighbourhood Centre | Large Neighbourhood Centre |
| The Hyde | Large Neighbourhood Centre | Large Neighbourhood Centre |
| Marymead | Large Neighbourhood Centre | Large Neighbourhood Centre |
| Oaks Cross | Large Neighbourhood Centre | Large Neighbourhood Centre |
| The Oval | Large Neighbourhood Centre | Large Neighbourhood Centre |
| Poplars | Large Neighbourhood Centre | District Centre |
| Canterbury Way | Large Neighbourhood Centre | Small Neighbourhood Centre |
| Filey Close | Large Neighbourhood Centre | Small Neighbourhood Centre |
| Chells Manor | Large Neighbourhood Centre | Small Neighbourhood Centre |
| Archer Road | Small Neighbourhood Centre | Local Shop(s) |
| Austen Paths | Small Neighbourhood Centre | Local Shop(s) |
| Burwell Road | Small Neighbourhood Centre | Local Shop(s) |
| Fairview Road | Small Neighbourhood Centre | Local Shop(s) |
| Hydean Way | Small Neighbourhood Centre | Small Neighbourhood Centre |
| Kenilworth Close | Small Neighbourhood Centre | Local Shop(s) |
| Lonsdale Road | Small Neighbourhood Centre | Local Shop(s) |
| Mobbsbury Way | Small Neighbourhood Centre | Small Neighbourhood Centre |
| Popple Way | Small Neighbourhood Centre | Small Neighbourhood Centre |
| Rockingham Way | Small Neighbourhood Centre | Small Neighbourhood Centre |
| Roebuck | Small Neighbourhood Centre | Large Neighbourhood Centre |
| Whitesmead Road | Small Neighbourhood Centre | Local Shop(s) |

10.29 Having regard to the proposed hierarchy of centres, we recommend that the local planning authority implement locally set retail impact floorspace thresholds in accordance with paragraph 26 of NPPF. If the local authority does not implement any local thresholds, then applications will be assessed against the national threshold of 2,500 sq m. This could be potentially harmful to centres.

10.30 We recommend that the local planning authority request an impact assessment for any retail or leisure proposal, which is located in an in-centre or edge-of-centre location, if the proposal exceeds the following floorspace thresholds.

| Designation | Local Retail Impact Threshold (sq.m.gross) |
|----------------------------|--|
| Town Centre | 2,500 sq m |
| Major Centre | 1,000 sq m |
| Large Neighbourhood Centre | 750 sq m |
| Small Neighbourhood Centre | 500 sq m |
| Local Shops | 300 sq m |
| Out-Of-Centre | 300 sq m |

- 10.31 We also recommend that the local planning authority should request an impact assessment for any out-of-centre retail or leisure development above 300 sq m gross. In all cases, the retail impact assessment should be proportionate to the scale of application proposed.

Retail Frontages

- 10.32 We have reviewed the Council's distinction between Primary and Secondary Retail Frontages. The only alteration we propose is to extend the Primary Frontage along the eastern flank of The Forum. The Primary Frontages would include the malls in the Westgate Centre which are not detailed on Plan 1.

Other Town Centre Uses

- 10.33 With regard to leisure uses we do not consider that there is any need to cater for large space uses in the Town Centre such as bowling alleys, cinema, bingo and nightclubs. This is because they are already primarily catered for at the Stevenage Leisure Park which has critical mass for this type of destination and uses in this location are isolated from other uses such as residential to which disturbance could be caused.
- 10.34 With regards to A3 and A4 uses such as bars and restaurants we recommend that uses that support the retail function of the Town Centre such as cafes and snack bars, should in general be encouraged, especially in the more secondary locations. The local authority should monitor such changes of use and although we think it unlikely, should introduce policies to prevent a harmful proliferation in the Core Shopping Area.
- 10.35 In relation to A3 restaurants and A4 bars which heavily rely on evening trade we recommend that such use should be resisted, possibly through planning conditions limiting opening hours. In order to be successful these uses need to be part of a critical mass which could be harmful to established retail patterns and the amenities of residents in the Town Centre.
- 10.36 In general, the Town Centre is not a suitable location for A5 takeaway uses due to poor access by car. Such uses can also harm vitality and viability of the centre.