



Stevenage Retail Study Update

October 2024

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1 INTRODUCTION

The Purposes of the Study

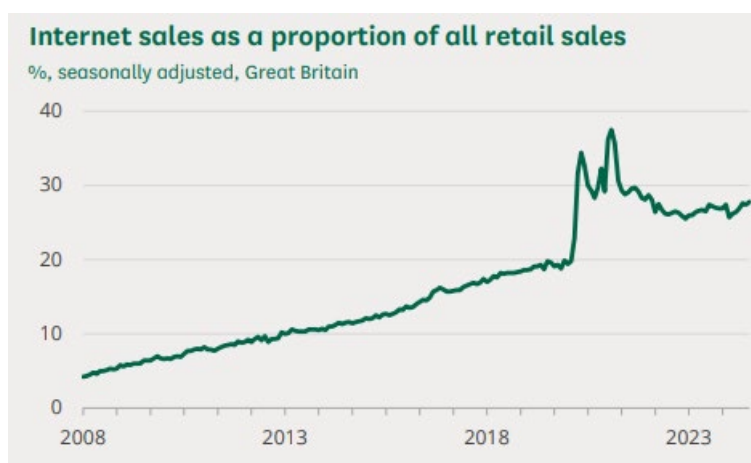
- 1.1 Applied Town Planning Ltd (Applied Planning) have been appointed by Stevenage Borough Council (SBC) to update the Applied Planning Stevenage Retail Study which was published in October 2014.
- 1.2 The purpose of the Retail Study Update is to provide a refresh of the 2014 Study for the purposes of the current Stevenage Borough Local Plan Review (SBLPR) and to focus on the key drivers of change.
- 1.3 The existing Stevenage Borough Local Plan 2011-2031 (SBLP) was adopted on 22nd May 2019 and covers the period up until 2031. The SBLPR maintains the Development Plan period and will also cover the period until period 2031.
- 1.4 The purposes of this current Retail Study Update is a review of the retail facilities in the town and a review of the change, and is limited to factual and necessary changes only, related to key drivers of change since the SBLP was adopted in 2019.
- 1.5 The Retail Study Update will provide part of the evidence base underpinning the SBLPR and the purposes of the Study are specifically to provide:
 - An update on National / Local Policy and Legislation;
 - An update on the baseline position including updated health checks of defined centres, a review of the role and function of centres and the retail hierarchy and updated information on out of centre retail parks, supermarkets and SG1;
 - A review of the baseline need analysis in the 2014 Study and a review of commitments and new facilities since the publication of 2014 and contributions that have been delivered towards identified quantitative and qualitative needs in the plan period to 2031.
 - A review of the current Local Plan policies including the retail hierarchy, Primary and Secondary Retail Shopping Frontages, Defined Centre Boundaries and locally set retail and leisure impact assessment thresholds
 - Recommendations for Development Plan Policy within the SLPR.

2 RETAIL AND LEISURE TRENDS

2.1 In order to provide context for this Retail Study Update and to identify sectors where there is a greater likelihood of additional development proposals, this Section provides an update of current retail and leisure trends.

Internet Shopping

2.2 Online shopping has increased markedly since the 2014 Retail Study and became the norm during the coronavirus pandemic. According to the Office for National Statistics, the proportion of online sales as a percentage of all retail sales peaked during the January 2021 lockdown at approximately 37% of all sales. However, this percentage fell back after pandemic and in May 2022, seasonally adjusted internet sales accounted for 26.6% of all official retail sales, and the figure has remained relatively consistent since (being 26.7% in July 2024).



Source: ONS, series [MS6Y](#)

2.3 The proportionate increase in online sales has been greater in particular sectors most notably in the categories of ‘clothing’, ‘electrical household appliance’, and ‘sports equipment’ and ‘games and toys’. Data on online retailing published by the Centre for Retail Research indicates that prominent UK fashion retailers such as Next now derive “a minority of their sales from their retail premises.

2.4 Convenience goods online sales have remained relatively static between 2019-2023, being circa 10% of all retail sales by sector according to the ONS Retail Sales Index. In regard to on-line grocery sales, most of the main large format foodstores (apart from ALDI and Lidl) provide a delivery service. Apart from Ocado, where products are picked from warehouses, most orders are sourced from within existing stores and picked by staff, meaning that the rise in food internet sales does not directly correlate with a loss of demand for convenience goods floorspace.

2.5 There has also been an expansion in the click and collect services, whereby orders are made online with purchases being picked up at a dedicated counter within a

store. In recent years, many large format stores have re-configured their car parks to facilitate this service.

Supermarket Environments

- 2.6 Over the last decade, planning applications for large format convenience superstores have reduced dramatically, and in some cases planning permissions are not being built out partially due to concerns about viability. At the same time there has been a significant expansion in Limited Assortment Discounters (LADs) (Aldi and Lidl) who both are undertaking a significant investment programme to increase their market share through new store openings.
- 2.7 These LAD Stores are typically of set formats providing a circa 1,900 sq m gross internal area with a 1,200-1,300 sq m sales area with an 80%/20% convenience goods/comparison goods sales floorspace split. The LAD stores commonly seek to serve a localised catchment area primarily serving residents within a 4-5 minute drive-time catchment area of the store, meaning that in urban areas it is increasing commonplace for there to be numerous stores in relatively close proximity.
- 2.8 Changing consumer behaviour has also affected the big four supermarkets. In recent years, consumers have begun to make more frequent, smaller value shopping trips. Consumer preference has shifted in favour of single item purchases, rather than “big weekly shops” while the trend towards increased online purchasing means that a large stock selection in store is no longer as important’. (Retail Sector in the UK Commons Library Research Briefing, 16 August 2024).
- 2.9 Facilitating, and as a result of this trend, the major supermarkets have also altered the profile of their estates, with a concerted move away from out-of-town stores towards town centre convenience stores and ‘small supermarkets’. In 2014, Sainsbury’s announced that it had more convenience stores than supermarkets; Tesco, the UK’s largest retailer, announced that its convenience stores outnumber its supermarkets in 2013. Morrisons and Asda have also begun to expand into convenience stores and the first Morrisons Daily was opened in 2017, with the chain has expanding this portion of its operations following the acquisition of McColls in 2022. Asda opened its first convenience store in late 2022, with plans to expand after acquiring a number of sites from the Co-Op. (Retail Sector in the UK Commons Library Research Briefing, 16 August 2024).
- 2.10 These national trends are evident within Stevenage Borough, with Morrisons Daily now having a presence in Stevenage Old Town, Canterbury Way, Bedwell Crescent and Hydean Way Centres, which are all new additions since the 2014 Retail Study.

Comparison Goods Trends

- 2.11 A number of the major comparison goods multiple retailers are changing their store formats and locational requirements. This is a national trend which is also evident in Stevenage with key anchor retailers such as TK Maxx, Sports Direct, Boots and Marks and Spencer locating to larger format out of centre units. This national trend

has been amplified in the case of Stevenage as this locational shift has occurred at the same time as the redevelopment of the Town Centre.

- 2.12 These larger multiples are shifting to stores which provide an experience that cannot be provided online by providing stores with experiences such as cafes, repairs, and product support. In parallel with this trend, there has been an increase in standalone restaurants being provided in out-of-centre retail parks in order that the Retail Parks can provide a wider experience to visitors.

Mixed Use Centres

- 2.13 The Centre for Cities have predicted successful high streets of the future, in addition to shopping, will also offer “what we cannot find at home or online, by moving away from over reliance on retail towards the ‘experience’ ” (Retail Sector in the UK Commons Library Research Briefing, 16 August 2024).
- 2.14 The thrust of Government policy is clear that town centres should be allowed to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries. The changes to permitted development rights in 2020, were intended to streamline the planning system to enable buildings to be converted between commercial, business and service uses – shops, restaurants, services (like banks), gyms, offices, research facilities – and into a mix of such uses – without needing planning permission.
- 2.15 In recent years there has been a general expansion of food and drink, and retail service operators within centres, and the availability of high street units post the pandemic has given rise to an increase in independent operators. The expansion of beauty and personal service shops further highlights this trend, signalling the type of service that customers value that is not found online.
- 2.16 The diversification of centres into mixed use destinations, where residents can enjoy wider experiences is a continuing trend and it is noted that the regeneration strategy for Stevenage Town Centre is also based on this ethos to diversify the overall offer.
- 2.17 With the continued presence of online retailing, Applied Planning consider that successful high streets of the future will be mixed use destinations, where residents visit for socialisation, services, as well as the retail offer. In many cases the expansion of the food and drink sector within centres, is having wider beneficial impacts on town centres making them destinations and attracting retailers which are benefiting from linked trips.

Implications for Stevenage

- 2.18 These trends have consequences for Stevenage and its town centre. There has been a notable relocation of major comparison goods multiples out of the town centre to out of centre retail parks. The regeneration strategy of the Town Centre is

also underpinned by an aim to diversify the offer to increase the overall mix of uses and create both a daytime and evening economy.

- 2.19 In Section 8 of this Study we consider the implications of these trends and aspirations for development plan policy.

3 PLANNING POLICY FRAMEWORK AND LEGISLATIVE REVIEW

- 3.1 To inform this Study it is necessary to review relevant retail and town centres uses policy at both the national and local level as well as changes in the legislative and planning policy context since the publication of the original Retail Study in 2014.

National Planning Policy Framework (NPPF) December 2023

- 3.2 The 2014 Retail Study was published at a time when the March 2012 version of the NPPF applied for the purposes of examining plans and was a material consideration in the decision-making process.
- 3.3 The latest version of the NPPF was published in December 2023 and Section 7 deals with retail and town centres uses and ensuring the vitality of centres. In respect to town centre uses policy, the NPPF 2023 broadly aligns with the 2012 version of the NPPF. The current relevant policies in the NPPF and changes since the 2012 version are summarised below.
- 3.4 Paragraph 90 of the NPPF 2023 states that planning policies and decisions should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation. Specifically, paragraph 90 identifies that [town centre uses] planning policies should:
- a) 'define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
 - b) define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
 - c) retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
 - d) allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
 - e) where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and

f) recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.'

3.5 Paragraph 90 of the NPPF 2023 revises paragraph 23 of the NPPF 2012 and broadly echoes the 2012 requirements. Principal matters for consideration are as follows:

- Paragraph 90 of the NPPF now states that town centre planning policies should take a positive approach to the 'adaption' of town centres as well as supporting their growth and management.
- Paragraph 90a maintains the requirement to define a network and hierarchy of centres but now also states that centres long term vitality and viability is to be promoted. Paragraph 90a of the NPPF 2023 advises that long term vitality and viability should be promoted by allowing centres to grow and diversify, respond to rapid changes in the retail and leisure industries, by allowing a suitable mix of uses (including housing) reflecting their distinctive characters.
- Paragraph 90b maintains the requirement to define the extent of town centres and primary shopping areas and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of a centre.
- The NPPF 2023 has deleted the requirement for local authorities to define primary and secondary retail frontages in designated centres which was previously a requirement of bullet point 3 of paragraph 23 of the NPPF 2012.
- Paragraph 90d of the NPPF 2023 now states that a range of suitable sites should be allocated in town centres to meet the scale and type of development likely to be needed 'looking at least 10 years ahead'. This requirement to plan to meet needs across a minimum of a 10 year period represents a change from the NPPF 2012 which required the needs for town centre uses to be met within the entire plan period.
- Bullet point 8 of the NPPF 2012 which stated that local planning authorities should 'set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres' has been omitted from the NPPF 2023.

3.6 Paragraphs 91-93 of the NPPF 2023 maintains the requirement for a sequential test to be applied for main town uses which are neither in an existing centre nor in accordance with an up-to-date development plan. Main town centre uses should be located in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered. The main change to sequential test policy from 2012, is that later revisions of the NPPF expanded on the issue of the period of 'availability' and paragraph 91 of the NPPF now states that only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered. It remains a requirement for applicants

and local authorities to demonstrate issues flexibility on issues such as format and scale.

- 3.7 Paragraph 94 of the NPPF 2023 maintains the requirement for impacts assessments and now states that:

‘When assessing applications for retail and leisure development outside town centres, which are not in accordance with an up-to-date 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 2,500m² of gross floorspace). This should include assessment of:

a) 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

b) the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme)’

- 3.8 The principal changes to the impact test since the NPPF 2012 is that:

- It is no longer a requirement to undertake impact assessments for office development.
- Criterion b now states that impact on town centre vitality and viability should be assessed as applicable to the scale and nature of the scheme. References for impact assessments to undertaken for up to five years from time of the application, and for up ten years for major schemes, have been removed.

- 3.9 At paragraph 95 of the NPPF 2023 the NPPF continues to state:

‘Where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the considerations in paragraph 94, it should be refused.’

- 3.10 Finally, in respect to plan-making paragraph 20 of the NPPF 2023 states that strategic policies should set out an overall strategy and make sufficient provision for retail, leisure and other commercial development. Paragraph 31 also confirms that the preparation and review of all policies should be underpinned by relevant and up-to-date evidence which should be adequate and proportionate, tightly focused and supporting and justifying the policies concerned, and take account of relevant market signals.

Planning Practice Guidance

- 3.11 National Planning Practice Guidance (NPPG) was first published on 3rd March 2014 and Town Centre and Retail Section was last updated on 18th March 2020. The

NPPG provides guidance on how retail and town centres uses policy should be applied in respect to the plan-making and decision taking.

- 3.12 Paragraph 001 states that the key way to set out a vision and strategy for town centres is through the development plan and (if needed) supplementary planning documents. Paragraph 002 also advises that planning policies are expected to define the extent of primary shopping areas and that Authorities may, where appropriate, also wish to define primary and secondary retail frontages where their use can be justified in supporting the vitality and viability of particular centres.
- 3.13 Paragraph 005 advises that town centre strategies should be based on evidence of the current state of town centres and the opportunities that exist to accommodate a range of suitable development and support their vitality and viability. Strategies should be used to establish:
- the realistic role, function and hierarchy of town centres over the plan period. Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed.
 - the vision for the future of each town centre, including the most appropriate mix of uses to enhance overall vitality and viability.
 - the ability of the town centre to accommodate the scale of assessed need for main town centre uses, and associated need for expansion, consolidation, restructuring or to enable new development or the redevelopment of under-utilised space. It can involve evaluating different policy options (for example expanding the market share of a particular centre) or the implications of wider policy such as infrastructure delivery and demographic or economic change.
 - how existing land can be used more effectively – for example the scope to group particular uses such as retail, restaurant and leisure activities into hubs or for converting airspace above shops.
 - opportunities for improvements to the accessibility and wider quality of town centre locations, including improvements to transport links in and around town centres and enhancement of the public realm (including spaces such as public squares, parks and gardens).
 - what complementary strategies are necessary or appropriate to enhance the town centre and help deliver the vision for its future, and how these can be planned and delivered. For example, this may include consideration of how parking charges and enforcement can be made proportionate.
 - the role that different stakeholders can play in delivering the vision. If appropriate, it can help establish the level of cross-boundary/strategic working or information sharing required between both public and private sector groups.

- appropriate policies to address environmental issues facing town centres, including opportunities to conserve and enhance the historic environment.
- 3.14 Paragraph 005 advises that it may not be possible to accommodate all forecast needs for main town centre uses in a town centre. In these circumstances, planning authorities should plan positively to identify the most appropriate alternative strategy for meeting the identified need for these main town centre uses, having regard to the sequential and impact tests.
- 3.15 Paragraph 006 sets out the indicators which may be relevant for assessing the health of centres and planning for their future. These indicators remain broadly consistent with best practice at the time of preparation of the 2014 Retail Study.
- 3.16 Paragraphs 007 and 008 advise on changes to permitted development rights and states that broad range of national permitted development rights support appropriate changes of use, and temporary changes of use, in town centres. We expand on the changes to permitted development rights below.
- 3.17 Paragraph 010 advises how the sequential test should be used in plan-making and that the sequential approach requires a thorough assessment of the suitability, viability and availability of locations for main town centre uses. It requires clearly explained reasoning if more central opportunities to locate main town centre uses are rejected.
- 3.18 Paragraph 016 states how the impact test should be used in plan-making and that if plan policies are based on meeting the assessed need for town centre uses in accordance with the sequential approach, issues of adverse impact should not arise. The impact test may however be useful in determining whether proposals in certain locations would impact on existing, committed and planned public and private investment, or on the role of particular centres.

Permitted Development and Use Class Order

- 3.19 On 1st September 2020, the Use Class Order was significantly amended. The update to the Town and Country Planning (Use Classes) Order 1987 created Class E which combines shops, restaurants, offices, gyms and nurseries (amongst others) that no longer require planning permission to switch uses. A number of other town centre uses became 'sui-generis'
- 3.20 Class E of the Use Class Order now includes, inter alia:
- a) Shop other than for the sale of hot food
 - b) Sale of food and drink for consumption (mostly) on the premises
 - c) Provision of:
 - i Financial services,

- ii Professional services (other than health or medical services), or
 - iii Other appropriate services in a commercial, business or service locality
 - d) Indoor sport, recreation or fitness (not involving motorised vehicles or firearms or use as a swimming pool or skating rink,)
 - e) Provision of medical or health services (except the use of premises attached to the residence of the consultant or practitioner)
 - f) Creche, day nursery or day centre (not including a residential use)
 - g) Uses which can be carried out in a residential area without detriment to its amenity:
 - i Offices to carry out any operational or administrative functions,
 - ii Research and development of products or processes
 - iii Industrial processes
- 3.21 Changes to another use, or mix of uses, within Class E no longer requires planning permission. The Government has advised that the main driver of change has been the need to enable a repurposing of buildings on high streets and town centres.
- 3.22 In addition, drinking establishments, takeaways, launderettes, betting shops, nightclubs, casinos, concert halls, bingo halls and dance halls (amongst other uses) are sui-generis.
- 3.23 The Government has also introduced Class MA Permitted Development Rights which allows for, in certain circumstances and through a process of prior approval, development consisting of a change of use of a building and any land within its curtilage from a use falling within Class E to a use falling within Class C3 (dwellinghouses).

Stevenage Borough Local Plan 2011-2031

- 3.24 The statutory development plan is the Stevenage Borough Local Plan 2011-2031 (SBLP) which was adopted on 22nd May 2019. This replaced the Stevenage District Plan (Second Review) which was published in 2004 and was 'saved' until December 2007. The 2014 Retail Study formed part of the evidence base for the SBLP and informed it's policies.
- 3.25 A summary of the key policies in respect to town centre uses is set out below. These policies are also considered in more detail in the Policy Recommendations section of this Study.
- 3.26 Policy SP2 sets out how sustainable development will be achieved in Stevenage and states at criterion C that planning permission will be granted where proposals

demonstrate (as applicable) that they will regenerate areas of the town that are underperforming.

- 3.27 Policy SP3 seeks to promote a strong, competitive economy and states at criterion f that the SBLP will recognise the important role played by town's retail, health and other non-B class land uses in providing employment.
- 3.28 Policy SP4 relates to a vital town centre. Criterion a) identifies and seeks to maintain the retail hierarchy of:
- i. Stevenage Town Centre;
 - ii. High Street, Major Centre;
 - iii. Poplars, District Centre;
 - iv. Seven Local Centres; and
 - v. Seven Neighbourhood Centres
- 3.29 Criterion b) promotes the comprehensive and co-ordinated regeneration of Stevenage Central (Town Centre plus adjoining sites). The Policy states that this will provide for in the order of 4,700m² of additional comparison retail floorspace, 3,000 new homes and an improved range of shopping, bars, restaurants, leisure, community, civic and cultural facilities. An extended and regenerated train station will be the focus of an enlarged Stevenage Central area, within which six Major Opportunity Areas will be designated to promote distinct mixed-use redevelopment schemes.
- 3.30 Criterion c) states that primary retail frontages in both the Town Centre Shopping Area and the High Street Shopping Area will be retained as the focus of major comparison shopping.
- 3.31 Criterion D support the provision of up to 7,600 m² net of additional convenience floorspace within the Borough boundary by 2031 to meet the needs of the expanded town. This will include:
- i. 1,500m² for extensions to existing centres in the retail hierarchy, then other stores in accordance with the sequential test;
 - ii. A Local Centre in the west of Stevenage development in the order of 500m² to meet the day-to-day needs of the residents of the new neighbourhood;
 - iii. A Local Centre in the north of Stevenage development in the order of 500m² to meet the day-to-day needs of the residents of the new neighbourhood;
 - iv. A Neighbourhood Centre in the south-east of Stevenage development of no more than 500m² with a convenience store and other related small-scale Use Class A1 shops sufficient to meet the day-to-day needs of the residents of the new neighbourhood;

- v. A new allocation for a large new store, in the order of 4,600m² net convenience goods floorspace and 920m² net comparison goods floorspace, at Graveley Road to meet identified needs post-2023
- 3.32 Criterion e) states that new out-of-centre comparison goods floorspace will be tightly regulated including the refusal of the relaxation or removal of conditions on the type of goods that can be sold from existing out-of-centre comparison retail unit.
- 3.33 Policy SP9 (Healthy Communities) states that community facilities will be provided that meet the needs of local residents. The Policy identifies that (inter alia):
- A hierarchy of centres will be identified;
 - Applications within identified centres where they support its role and function, deliver the proposed distribution of retail floorspace and preserve the vitality and viability of the hierarchy as a whole will be permitted; and
 - Centres will be required to be provided in significant new developments.
- 3.34 Section 7 of the SBLP is concerned with town centres uses policy. Policy TC1 confirms that the extent of Stevenage Town Centre is defined on the Policy Map for the purposes of what is now paragraph 90 of the NPPF.
- 3.35 Policies TC2 – TC7 define six separate Major Opportunity Areas (MOA) within the Town Centre and site-specific policies are provided for each MOA setting out key design principles and strategic components.
- 3.36 Policy TC8 and the Proposals Map defines Stevenage Town Centre Shopping Area (TCSA) and identifies Primary Shopping Frontages and provides policy on what use classes will be permitted in these areas.
- 3.37 Policy TC9 and the Proposals Map defines the extent of High Street Shopping Area (HSSA) in Stevenage Old Town and states that planning permission will be granted for development of an appropriate scale for use classes A1, A2, A3, A4, C1, C3, D1 or D2 (based on the 1987 Use Class) Order subject to other development control criteria being met.
- 3.38 Policy TC10 defines Primary and Secondary Frontages within the HSSA and provides policy on what use classes will be permitted in these areas.
- 3.39 Policy TC11 is concerned with new convenience retail provision and provides a spatial strategy and allocates the projected Borough wider need for 7,600 sq m net of convenience trading floorspace which was identified within the 2014 Study. The policy:
- Reserves 1,500m² of floorspace to be provided as extensions to existing stores in the retail hierarchy, then other stores in accordance with the sequential test.

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- States new Local Centres will be permitted in each of the Stevenage West and North of Stevenage new neighbourhoods, each in the order of 500m², to meet the day-to-day needs of the residents of the respective new developments
 - States a Neighbourhood Centre will be permitted in the South-East of Stevenage development of no more than 500m² with a convenience store and other related small-scale Use Class A1 shops, sufficient to meet the day-to-day needs of the residents of the new neighbourhood.
 - Allocates a site for a major new foodstore of up to 4,600m² net convenience goods floorspace and 920m² net comparison goods floorspace to serve Borough-wide needs post-2023 as identified on the policies map at Graveley Road.
- 3.40 The 2014 Retail Study identified a need of 4,700 sq m net of additional comparison goods floorspace across the plan-period. Policy TC12 confirms that planning permission will be granted for in the order of 4,700 sq m of comparison retail floorspace within MOA's and states that proposals for out of centre comparison goods floorspace will be refused unless they are an ancillary element to a convenience store proposed under Policy TC11.
- 3.41 Policy TC13 provides a locally set retail impact assessment threshold and states an impact assessment will be required for any proposals in excess of 300m² for main town centre uses outside the Town Centre. Policy TC13 also re-iterates the requirement for a sequential test to be applied to town centre proposals.
- 3.42 Policy HC1 identifies a hierarchy of District, Local and Neighbourhood Centres and the boundaries of these are shown on the Proposals Map. The policy provides criteria in which planning permission for development proposals will be acceptable in these Centres.
- 3.43 Finally, policy HC2 states that freestanding shops and small parades (which are not in the defined retail hierarchy) will generally be retained. The policy goes on to set out the circumstances in which a change of use will be granted.

4 HEALTH CHECKS

4.1 The 2014 Retail Study undertook health checks for Stevenage Town Centre, Old Town High Street Major Centre, Poplar District Centre as well as the lower order Local and Neighbourhood Centres. The Retail Brief for this 2024 Retail Study Update requires that these health checks should be updated.

4.2 Paragraph 006 of the Planning for Town Centre Vitality and Viability of the PPG advises which indicators are useful and may be relevant when planning for town centres and high streets and assessing their health. These are:

- diversity of uses
- proportion of vacant street level property
- commercial yields on non-domestic property
- customers' experience and behaviour
- retailer representation and intentions to change representation
- commercial rents
- pedestrian flows
- accessibility – this includes transport accessibility and accessibility for people with different impairments or health conditions, as well as older people with mobility requirements.
- perception of safety and occurrence of crime
- state of town centre environmental quality
- balance between independent and multiple stores
- extent to which there is evidence of barriers to new businesses opening and existing businesses expanding
- opening hours/availability/extent to which there is an evening and night time economy offer

4.3 Within Stevenage, there are five tiers within the Boroughs Retail Hierarchy as defined in Policy SP4(a) of the SBLP. Policy SP4 states that the SBLP will maintain this retail hierarchy.

4.4 The existing retail hierarchy is set out below.

1. Stevenage Town Centre.
2. High Street Major Centre (Stevenage Old Town).
3. Poplars District Centre.
4. Seven Local Centres.
 - Bedwell Crescent
 - The Glebe

- The Hyde
- Marymead
- Oaks Cross
- The Oval
- Roebuck

5. Seven Neighbourhood Centres

- Canterbury Way
- Chells Manor
- Filey Close
- Hydean Way
- Mobbsbury Way
- Popple Way
- Rockingham Way

- 4.5 In accordance with the Retail Brief, comprehensive health checks have been undertaken for Stevenage Town Centre and High Street which have been supplemented by more concise audits of Poplars District Centre as well as the Local and Neighbourhood Centres.

Stevenage Town Centre Health Check

General

- 4.6 Stevenage Town Centre is the principal centre in Stevenage Borough and the primary economic and social destination. The Centre is largely anchored by the Westgate Centre and the Tesco Extra also provides an important anchor for the Town Centre.
- 4.7 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 are good levels of public car parking as well as public transport connections 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. Although a leading example of it's time, the Council has recognised that the Town Centre requires some

rejuvenation and recognition and that public realm and shopping environment is not aligned to modern day shoppers and commercial requirements of operators.

- 4.8 The Council is currently, in partnership with the development industry, pro-actively progressing a series of mixed-use regeneration projects, as well as new public transport infrastructure improvements, as part of positive strategy for the growth and adaption of the Centre.
- 4.9 As defined on the SBLP Policies Map, Stevenage Town Centre is generally bound by Fairlands Way to the north, St Georges Way to the east and Six Hills Way to the south. The railway line runs on a north/south axis through the Town Centre, and the area to the west of the railway line, comprises the Stevenage Leisure Park.

Map 1: SBLP – Stevenage Town Centre Policies Map

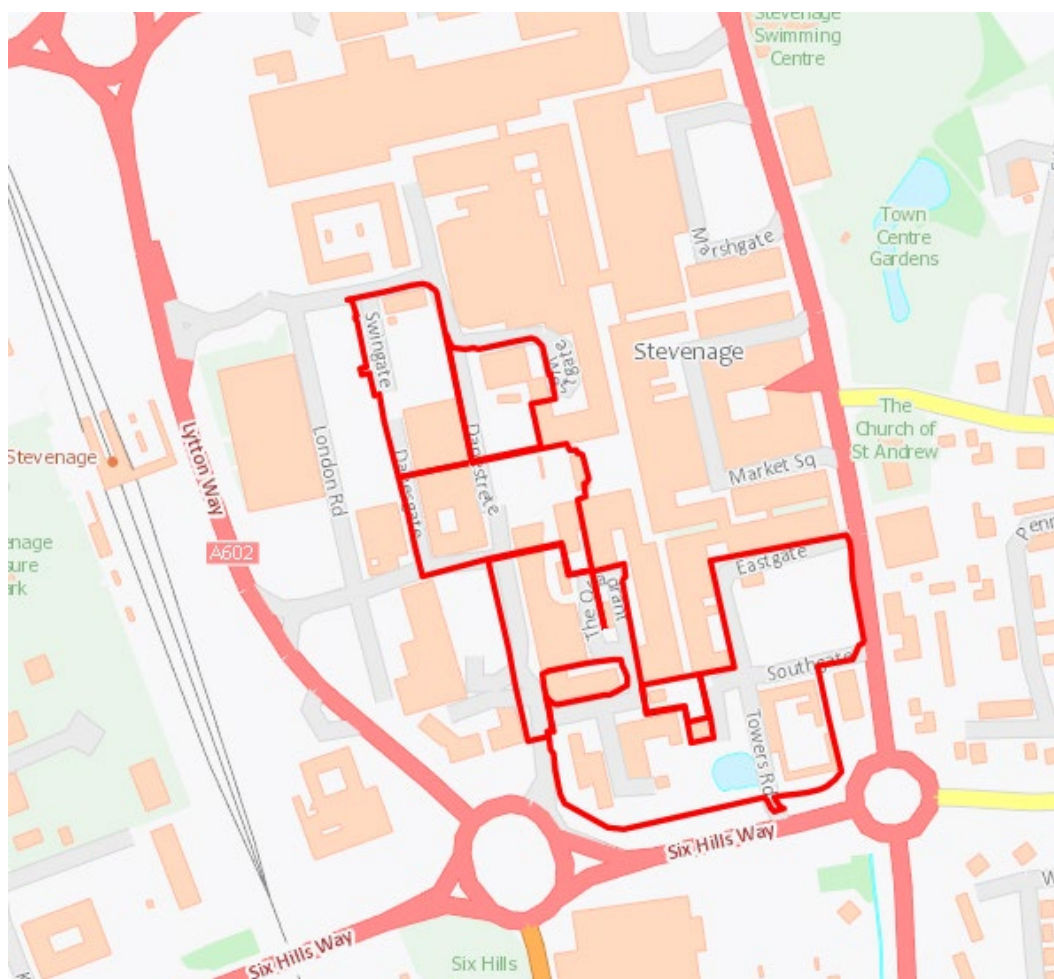


- 4.10 As set out in the policy review section of this Study, and as shown on the above policies map extract, much of the Town Centre (edged blue) is identified as Major Opportunity Areas in the SBLP (policies TC2-TC7) and or allocated for employment development (Policy EC1/5).
- 4.11 In total, six Major Opportunity Areas have been identified in the Town Centre and there are individual SBLP policies for each of these areas to encourage mixed use development with the purpose of adapting Stevenage to become a destination centre with an ‘extended day offer’ that meets the needs and aspirations of the its catchment.
- 4.12 To set the context for the Town Centre Health Check, this Health Check firstly sets out the latest position on the Major Opportunity Areas regeneration proposals.

SG1 Development, Stevenage

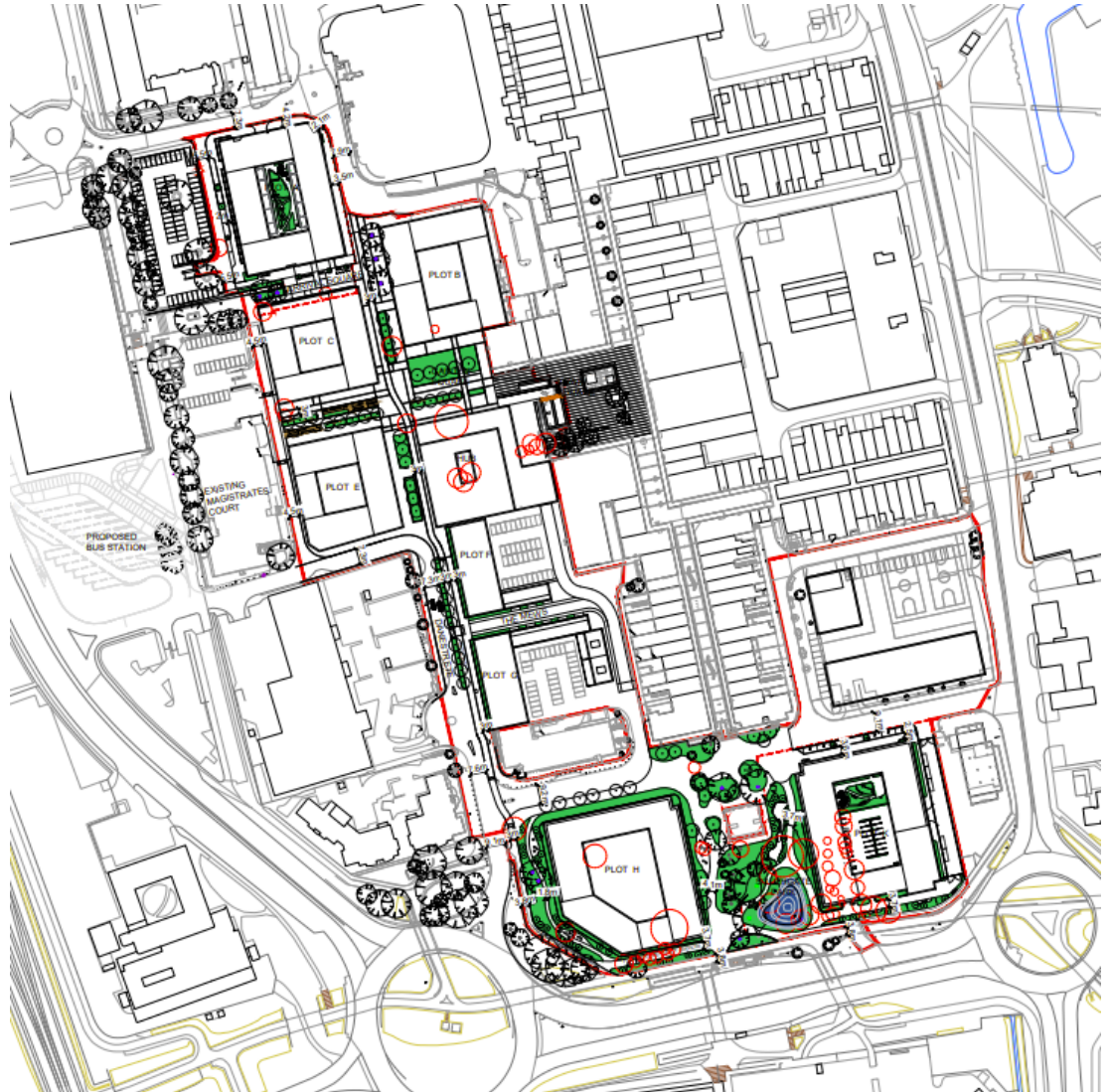
4.13 In May 2023, a hybrid planning application (reference 19/00743/ FPM) was granted permission for a site which extends to approximately 6 hectares of land within Stevenage Town Centre. The planning permission site is shown in the extract below, encompasses a number of the Major Opportunity Areas, and is located west and south of Queensway which is the main pedestrianised area of the town centre. The site itself is occupied by Swingate House (now demolished), the Council’s Offices, Mecca Bingo, The Plaza, Danestrete Health Centre, Stevenage Central Library, the former bus station site, former Police Station and Hertfordshire County Council Offices, as well as retail, commercial and residential properties. There are also a number of surface car parks which are currently operated by Stevenage Borough Council.

Map 2: SG1 Application Site



4.14 The Illustrative Masterplan submitted as part of the planning application is shown below

Map 3: SG1 Masterplan



4.15 The planning permission approves outline planning permission for the demolition of existing buildings on the site and the mixed use redevelopment of Plots A to K including new retail, food and beverage uses (A1 to A5), leisure (D2), office (B1), community (D1), 4 primary school (D1) and residential (C3). The new buildings will comprise of residential accommodation, retail floorspace, leisure floorspace, office floorspace, public services hub, primary school, plant, storage, servicing, new vehicle and pedestrian accesses and circulation, new public amenity space, new and amended car parking, landscaping, public realm and associated works.

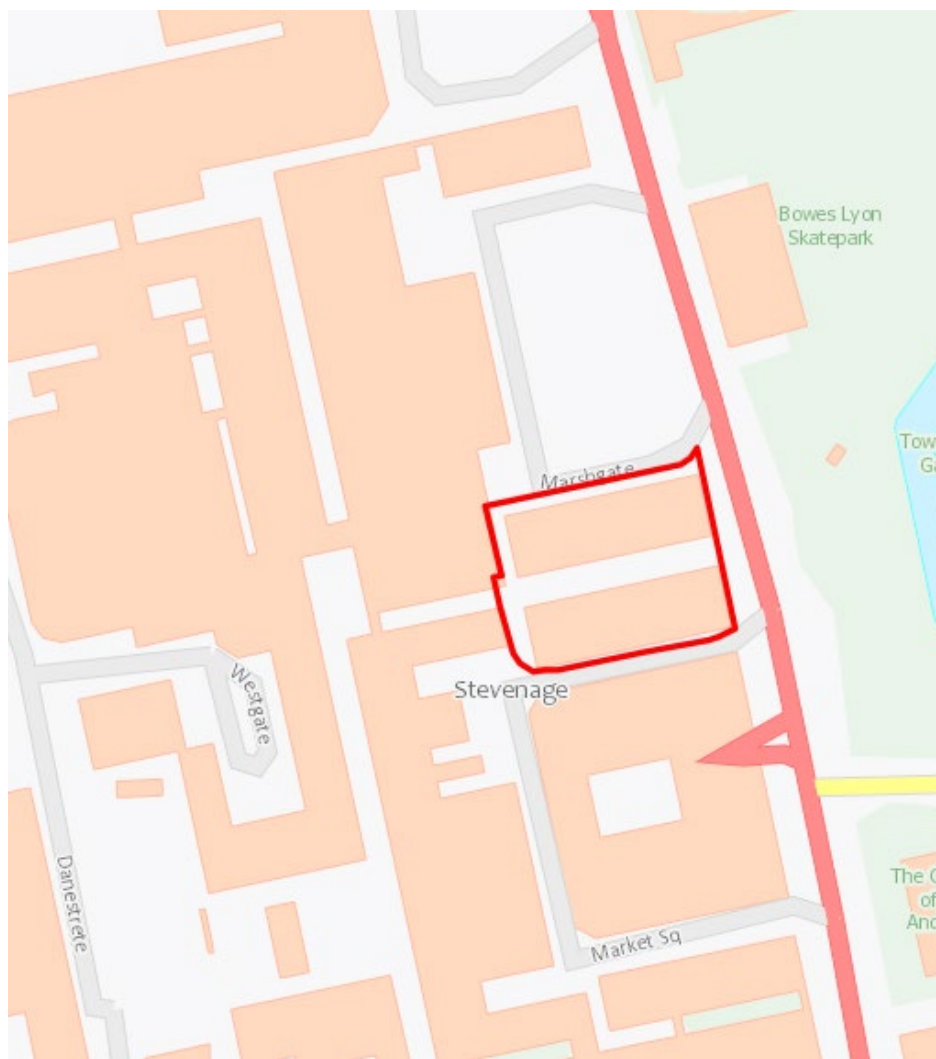
4.16 It is understood that works are planned to commence during 2025 and in summary, the SG1 development will provide:

- More than 1 million sq. ft of new residential-led mixed-use development to be delivered in phases
- A minimum of 1,700+ new homes for sale and to rent;
- 60,000 sq. ft + of new ground floor retail and restaurant space to attract an improved café and restaurant offer to the town;
- Over 12,000 sq. m of new public open space including a garden square, pedestrianised boulevard and landscaped park;
- A new 100,000 sq. ft Public Services Hub including community assets such as health services, library, voluntary sector, café and council offices; and
- A new primary school.

Park Place Redevelopment

4.17 In December 2016 planning permission (reference 16/00511/FPM) was granted for the change of use of an existing three storey building at Park Place in the eastern part of the town centre from A1 (retail), B1 (office) and D1 (dental clinic) to retail and residential use and the construction of three additional floors for residential use comprising 44 studio units, 120 one bedroom residential units, and 38 two bedroom residential units. The application site comprises the southern part of Major Opportunity Site TC7 and is shown on the site plan below.

Map 4: Park Place Application Site

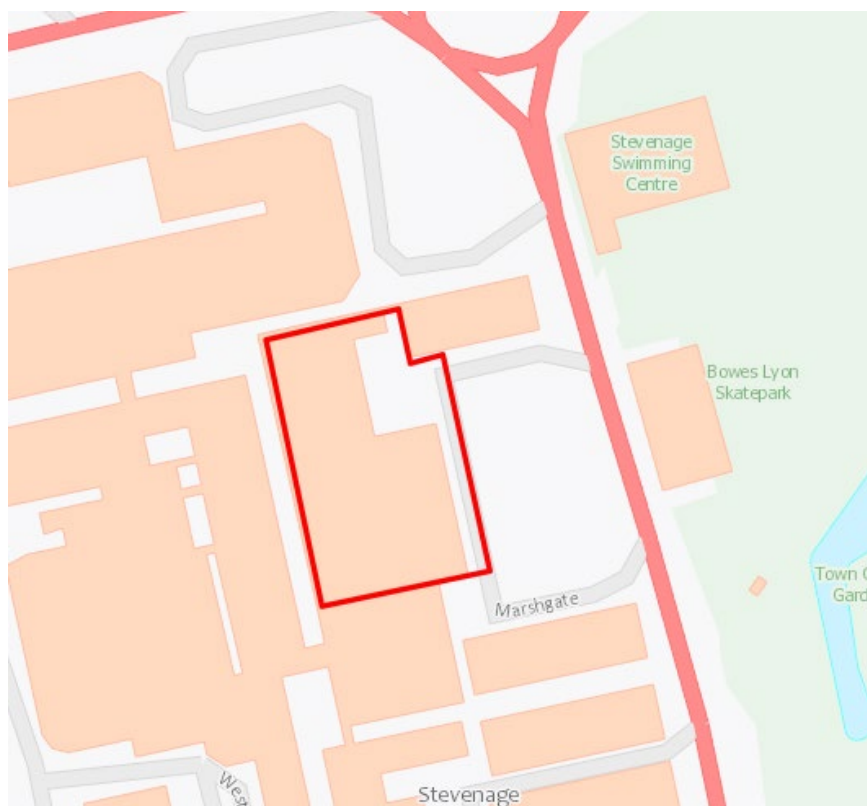


- 4.18 The development was completed in 2019 providing approximately apartments and commercial units in this gateway location when entering the town centre from the east. There are currently three occupiers of the commercial units, being Geek Retreat, Smarty Schoolwear and T shop. However, many of the new commercial units are currently vacant.

Queensway North

- 4.19 In December 2018 planning permission (reference 18/00268/FPM) was granted for the development site know as Queensway North. The plans were subsequently amended by planning permission reference 19/00641/FP in December 2019.
- 4.20 The application site comprised the former site of Marks and Spencer and adjoining buildings and is located in Major Opportunity Site TC7 and is shown on the site plan below.

Map 5: Queensway North Application Site



- 4.21 The development has now been completed and is a mixed use scheme comprises new retail, residential and commercial facilities including a 24-hour gym and office space along with 94 new homes and flexible working facilities.

Former Matalan Site

- 4.22 In October 2017 outline planning permission reference 14/00559/OPM was granted for the demolition of the existing buildings and the erection of up to 526 residential apartments and commercial units (Classes A1-A5) providing 1,7000 of commercial space (LPA Ref: 14/00559/OPM) at the site of the former Matalan Retail Park at Denestrete, Stevenage Town Centre. Reserved matters reference 20/00643/RMM were subsequently approved in April 2021.
- 4.23 The application site comprised the former Matalan Store and it’s associated car park and two council owned car parks to the west and is located in Major Opportunity Site TC2 and is shown on the site plan below.

Map 6: Former Matalan Site: Application Site

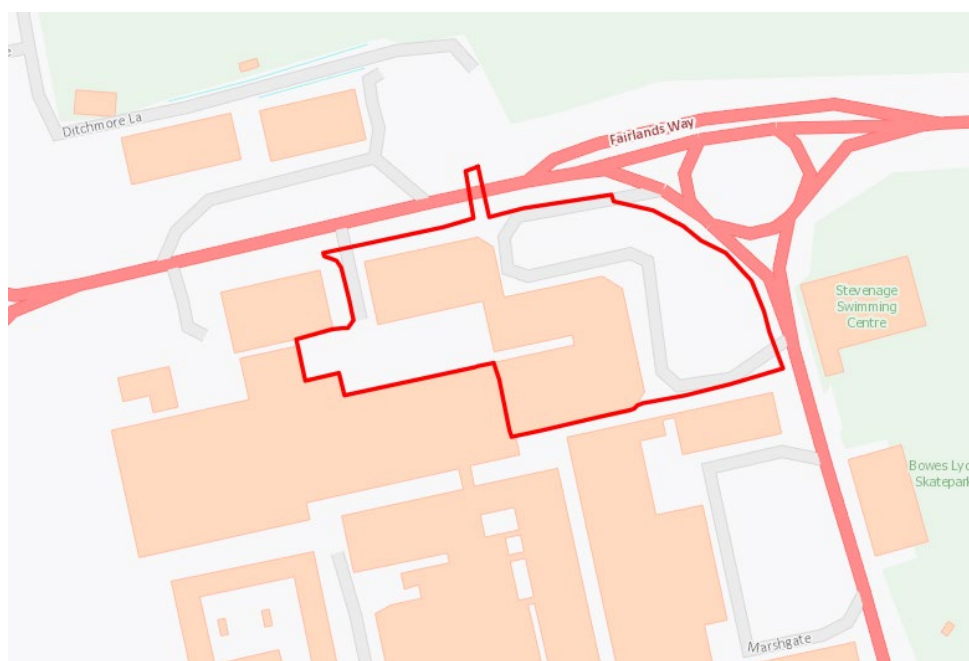


- 4.24 The development commenced during 2023 and the expected first phase completed late 2024/early 2025, with further phases to follow.

The Forum Redevelopment

- 4.25 Planning permission 22/00923/FPM was granted in June 2023 for the demolition of the existing retail units and the erection of a mixed use development comprising biopharma manufacturing laboratories and workspace facilities, together with flexible active ground floor uses including cafes, retail, collaboration spaces, Cinema and drinking establishments, and a new multi-storey public car park
- 4.26 The application site is located in the north west of the town centre at the edge of the pedestrianised retail area. The site currently comprises a 326-space surface car park, 8 medium/large retail units and a service yard and is in Major Opportunity Area TC7 and is shown on the site plan below.

Map 7: The Forum Redevelopment: Application Site

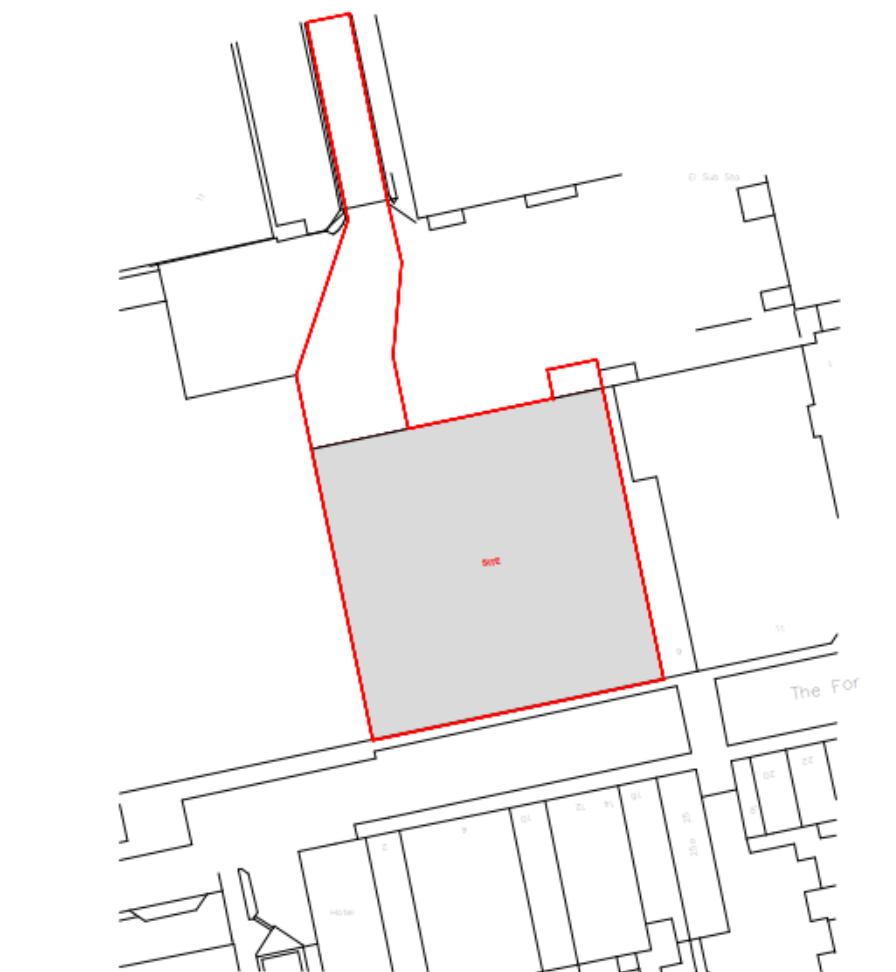


4.27 Applied Planning are currently unaware of when the developer intends to implement the planning permission. However, a number of major multiple retailers have left this site including TK Maxx/Homesense and B&M Bargains. Sports Direct and Game are also due to leave the site shortly and it is understood that Next are also seeking to vacate their premises. These operators have relocated, or are seeking to relocate, to out of centre retail parks within the town (primarily Roaring Meg).

Former BHS Store, 7 The Forum

4.28 Planning permission reference 19/00647/FPM for the partial demolition and redevelopment of existing former BHS store to create 11 storey building comprising of 1 no ground floor commercial unit and 129 apartments was permitted in August 2021. The site is not located within a Major Opportunity Area and the location of the application site is shown below

Map 8: Former BHS Store: Application Site



4.29 Applied Planning are currently unaware of when the developer intends to commence the planning permission.

Autolus (former Marshgate Car Park)

4.30 On the site of the former Marshgate car park, a new 83,000 sq ft life sciences building was completed in August 2023 pursuant to planning permission 21/00627/FPM. The development is located in Major Opportunity Area TC7 and shown in site plan below.

Map 9: Former Marshgate Car Park: Application Site



Other Developments

- 4.31 Alongside the above major development proposals, there has also been wider development proposals in the town centre including the relocation and modernisation of the bus interchange, expansion of the existing railway station and the redevelopment of the Town Square, and enhancements to the public realm. These proposals have contributed to the enhancement of the environmental quality and connectivity of Stevenage Town Centre.

Assessment of Regeneration Proposals

- 4.32 It is clear from this overview, that Stevenage Town Centre is currently undergoing an extensive regeneration programme which includes a number of ambitious projects. These projects will collectively deliver over a billion pounds of investment in the Town Centre over a 20-year period.

- 4.33 The regeneration strategy will lead to improvements in the retail units in the town centre, but importantly are re-purposing the centre to become a mixed-use destination providing a combination of retail, residential and commercial facilities, to make it a destination to live, work and shop. This regeneration strategy is a clear step-change from when Applied Planning undertook our original Retail Study in 2014 and it is commended that a long-term strategy is in place to grow and diversify the Town Centre to provide a mix of uses to promote and respond to the changes in retail and leisure industries.
- 4.34 There are also other regeneration schemes in the pipeline, including TC4 Station Gateway which are gathering momentum, which are proposing to deliver mixed uses included retail floorspace into the Town Centre. This process is of course ongoing, and it is imperative that during this transformation of the Town Centre, it is continued to be protected from out-of-centre competition in accordance with ‘town centre first principles’, and planning policies should support, enable and promote the long term vitality and viability of the centre. The impact of development on these planned, and committed developments, from development proposals outside of the Town Centre therefore needs to be carefully considered as required by paragraph 94b of the NPPF.
- 4.35 In this context, the following health check represents a snap-shot in time, in what is an evolving situation, as the development pipeline and regeneration of the Town Centre continues to be delivered.

Floorspace Analysis and Diversity of Uses

- 4.36 The 2024 Experian GOAD Category Report is derived from a survey in April 2024. Based on the town centre boundary as identified by Experian GOAD, the centre contains 225 commercial units which provide 826,000 sq ft of floorspace. The division of this floorspace, relative to the UK average, as surveyed by Experian GOAD is summarised in the Tables 1 and 2 below.

Table 1: Unit Composition – Stevenage Town Centre

	Stevenage Town Centre		
	No. of Units	% Units	Uk Average %
Comparison	70	31	26
Convenience	19	8	9
Retail Service	24	11	16
Leisure Service	38	17	26
Financial and Business Services	20	9	8
Vacant Outlets	54	24	14
Total	225	100	100

Table 2: Floorspace Composition Stevenage Town Centre

	Stevenage Town Centre		
	Floorspace Sq ft	% Floorspace	Uk Average %
Comparison	226,600	27	29
Convenience	152,800	18	16
Retail Service	20,500	2	7
Leisure Service	154,000	19	27
Financial and Business Services	41,300	5	6
Vacant Outlets	230,800	28	14
Total	826,000	100	100

- 4.37 The highest number of units fall within the comparison goods use, with 70 units being within this category providing 226,000 sq ft, which comprises 27% of floorspace, being broadly in accordance with the UK average. However, notably the percentage of comparison goods units and floorspace has fallen since the 2014 Study, at which point over 50% of floorspace was comparison goods.
- 4.38 The reduction in comparison goods floorspace in the Town Centre has partially been a result of the on-going redevelopment proposals and some major comparison goods multiples have relocated from the Town Centre to Roaring Meg Retail Park including M&S, TK Maxx and Sports Direct. In addition Next is also seeking to relocate to Roaring Meg from 2025.
- 4.39 There have also been some notable retailers which no longer have a presence in the Town Centre such as Matalan which left it's premises as a result of the redevelopment proposals. Whilst Stevenage Town Centre still has an average representation of comparison goods retailers, this trend is a cause for concern. Whilst the regeneration proposals to diversify uses with the Town Centre are commended, this has resulted in what is perhaps an inevitable relocation of operators from the Town Centre during the redevelopment. Many of these retailers have relocated to the out of centre Roaring Meg Retail Park and the enhanced retail offer at out of centre retail parks will provide increased competition for the Town Centre moving forward
- 4.40 It essential that the role and function of the Town Centre as principal retail destination in the Borough is maintained. Future regeneration phases in the Town Centre are likely to compromise substantial amounts of retail floorspace/comparison retail floorspace and attracting/retaining multiple comparison retailers in the Town Centre as anchor tenants is an important role component of ensuring the future vitality and viability of the Town Centre and delivering the planned public and private investment.
- 4.41 Applied Planning consider this trend and the policy implications of the migration of major multiple retailers from the Town Centre in Section 8 is this Study.
- 4.42 In terms of the sectoral split of comparison goods by number of outlets which are in the Town Centre, where an index score of 100 is parity with UK average, the Town

Centre is well represented by Leather and Travel Goods (485), Toys Games and Hobbie (399), Booksellers (274), Mens Wear and Accessories (259), Telephone and Accessories (252), Toiletries Cosmetics and Beauty Products (208), Cycles and Accessories (200) and Footwear (193).

- 4.43 There are also some notable comparison goods sectors where the Town Centre is poorly represented. There is currently no department store or variety store in the Town Centre, and the centre is under-represented for Chemist & Drugstores (47) and General Clothing (87). It is also notable that the number of charity operators is below the UK par at index of 87.
- 4.44 In terms of the location of these comparison goods retailers, they are primary located within the Westgate Centre and along Queensway, and the Primark Store on the corner of Town Square also provides an important anchor within the Town Centre.
- 4.45 The Town Centre is well represented in the convenience sector and the Tesco Extra provides an important destination in the Town Centre, albeit the store is now quite dated in terms of its external appearance. This is recognised in paragraph 7.11 of the SBLP, where it is recognised that redevelopment of this land-hungry site into a more mixed use, intensive, high density style would transform this north-western quarter of the Town Centre.
- 4.46 Within the convenience sector, the Town Centre is also well represented by Markets (424), Green Grocers (208), Bakers and Confectioners (122) and off-licenses. The Town Centre is also well represented by independent convenience good retailers, including ethnic minority food retailers, which are located outside of the defined shopping frontages. For instance, there are two independent ethnic minority food retailers on Market Place, which contribute to vitality and viability of this part of the Town Centre where footfall is noticeably high. Overall, it is considered that the Town Centre provides a varied and diverse convenience goods offer, and this is a positive strength of the Town Centre.
- 4.47 The business services sector in the Town Centre is also well represented, and there is a strong representation of banks and travel agents and there is a strong representation from national providers.
- 4.48 In terms of the retail service and leisure offer, the leisure offer within the Town Centre is principally provided at Stevenage Leisure Park to the west of the railway station, where there is a strong leisure offer including a cinema, bowling alley, indoor crazy golf and trampoline park. A number of national multiple restaurants are also located within the Leisure Park, and the overall there is a vibrant leisure offer within this area.
- 4.49 Within the area of the Town Centre to the east of the railway line, the retail service and leisure offer is more poorly represented, although Mecca Bingo is located to the north of Town Square. The Plaza previously provided a concentration of leisure uses within this part of the Town Centre, and currently there is a notable lack of public houses in the Town Centre, with only the Old Post Office Public House

remaining in The Plaza. There is also an under-representation of restaurants within the eastern part of the Town Centre. This under-representation of pubs and restaurants is a current weakness of the Town Centre, which the Council is seeking to address through the ongoing regeneration strategy.

Vacant Floorspace

- 4.50 According to the 2024 Experian GOAD Report there are currently 54 vacant units in the Town Centre which represents 24% of floorspace compared to a UK average of 14%. This percentage of vacant floorspace has increased markedly since the 2014 Study at which point there were 32 vacant units amounting to 14% of floorspace.
- 4.51 A high percentage of vacant units within a centre is key indicator of the vitality and viability of a centre, with higher vacancy rates undermining vitality and viability. However, in the case of Stevenage the ongoing regeneration of the Town Centre is a partial driver of this trend as tenants are vacating existing premises to facilitate the regeneration programme and there are notable areas of vacancies within The Forum and The Plaza, where redevelopment is proposed.
- 4.52 However, it is also noticeable that vacancy rates are high in areas which have been subject to redevelopment, most noticeably at Park Place. Applied Planning are unaware of the progress of commercial negotiations for occupiers to enter these newly created commercial units, but the occupancy rate of the newly created commercial units is a matter which should be carefully monitored by the Council.
- 4.53 The current high vacancy rate is snap-shot in time, but is a cause for concern, and it is recommended that SBC monitor this trend, particularly in light of the migration of a number of multiple retailers to out of centre retail parks during redevelopment of the Town Centre.

Pedestrian Flows within the Centre

- 4.54 During recent site visits, Applied Planning observed that the pedestrian flows within the Town Centre are fairly high, including at The Forum, the linkages between Tesco Extra within the rest of the Town Centre, and along Queensway. Pedestrian flows were also noticeably higher on Market Street, where there is a higher concentration of small independent retailers including independent food retailers, showing that these more peripheral areas are providing an important contribution to the overall vitality and viability of the Centre.

Accessibility

Walking

- 4.55 The Town Centre is accessible on foot from the surrounding area albeit the Centre is surrounded by major roads and residents are required to use underpasses. Nevertheless, the Centre is easily accessible to residents in surrounding residential areas and as residential development within the Centre continues to expand, there is a significant potential for the vitality and viability of the Centre to benefit from ease of access to services and shops from residents living within a reasonable walking distance of the Town Centre Offer.

Train

- 4.56 The Town Centre benefits from a train station which is centrally located between Stevenage Leisure Park to the west and the principal retail area to the east. This is a key gateway to the Town Centre providing connections to Kings Cross, London in 20 minutes, as well as more local settlements.
- 4.57 The train station is a major asset for the Town Centre, and the station and environs are subject to ongoing redevelopment proposals which will continue to benefit the vitality and viability of the Centre

Bus

- 4.58 The central bus station, which has benefitted from redevelopment, is now located between the train station and principal retail areas and there is a comprehensive network of buses providing access to the Town Centre. This facility is also an important asset for the Town Centre, and it's central location will assist in the ongoing regeneration of the Centre and alongside the train station provides good accessibility to support both the daytime and evening economy.

Cars and Car Parking

- 4.59 The Town Centre benefits from a suitable amount of car parking at both multi-storey and surface level which is available for short stay and long stay durations. Applied Planning are not aware of any reported shortages in car parking spaces. Car parking is also offered in central locations within both the retail area and Stevenage Leisure Park, in locations well related to the town centre offer.

Environmental Quality

- 4.60 The environmental quality of the town centre has been enhanced significantly since the 2014 Retail Study and this enhancement is ongoing process through the regeneration initiatives. The Town Centre is in a period of transition and building works and vacant units do impact on the environmental quality of the Town Centre, but the redevelopment of areas such of Town Square and Park Place are providing improvements in environmental quality and are demonstrating the successfulness of the approach.
- 4.61 Continued improvements to the environment quality of the Town Centre, will be an important component of the continuing regeneration programme to diversify Stevenage Town Centre into a leisure destination and establishing an evening economy.

Summary of Stevenage Town Centre Health Check

- 4.62 The Town Centre is in a period of transition and SBC is currently, in partnership with the development industry, pro-actively progressing a series of mixed use

regeneration projects, as part of positive strategy for the growth and adaption of the Centre.

- 4.63 These regeneration projects and the loss of floorspace has resulted in a number of major multiples leaving the Town Centre and an increase in vacancy rates. These trends are a particular concern as a number of operators have located to out of centre retail parks including Roaring Meg, and are now competing with the town centre.
- 4.64 This is a clear risk to the Town Centre, and the potential impact of this out of centre development and migration of multiples retailers, on the Town Centre regeneration strategy should be recognised in planning policy.
- 4.65 Whilst we conclude that overall the Town Centre has reasonable vitality and viability, the planning policy challenge is to ensure that Council's approach to growth and adaption of the Town Centre is not undermined by increased competition from out of centre retail parks, as maintaining and attracting a strong retail presence in the Town Centre is a central component of a strategy to deliver a successful mixed-use Town Centre.

High Street Major Centre (Stevenage Old Town)

- 4.66 Stevenage Old Town, as the name suggests, is the original pre-New Town centre of Stevenage and 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. The buildings in Old Town are primarily arranged in a linear pattern along High Street. There is ample on-street parking as well as public car parking off Primett Road.

Floorspace and Diversity of Uses

- 4.67 The Centre comprises a robust mix of retail, restaurants, cafes, coffee shops, public houses, and retail services including hairdressers and beauticians. There is a strong representation of independent retailers, which contribute to giving the Centre a unique character as both a leisure and shopping destination for both residents during both the daytime and evening economy.
- 4.68 The Centre has a convenience goods offer which provides a top-up shopping function for local residents. Whilst the Waitrose closed in recent years, current occupiers include a Tesco Express, Morrisons Daily and the Old Town Food Centre (which now occupies part of the former Waitrose unit).
- 4.69 There is a centre is well represented in the retail service sector, with a high proportion of hairdressers and beauticians, and there is also a strong presence of estate agents.
- 4.70 There is a high proportion of restaurants, bars and public houses in the centre and a number of the restaurants have outdoor seating areas which add to the vibrancy and vitality of the centre as a leisure destination.

- 4.71 The centre also has a day-to-day comparison goods offer including two pharmacies. There are also a number of specialist comparison goods retailers such as a bike shop, bridal shop, music shop and camera shop which provide a specialist offer for the wider catchment.
- 4.72 There are also community use buildings including a library at the north of the centre. Springfield Community Centre is also located to the north of the High Street Shopping Area as defined in SBLP.
- 4.73 Applied Planning surveyed Old Town in September 2024. A total of 135 units were identified and the results of the survey are shown in Table 3 below.

Table 3 – Retail Composition of Stevenage Old Town as of September 2024

Stevenage Old Town	Number of Units	Percentage of Units
Foodstore	3	2
CTN/Off License		0
Comparison Goods	24	18
Charity Shops	2	1
Pharmacy	2	1
Opticians	1	1
Takeaways	13	10
Cafes/Restaurants	20	15
Bookmakers	4	3
Hairdressers/Beauticians	25	19
Veterinary Clinic		0
Estate Agents	8	6
Vacancies	8	6
Others	13	10
Sub-Total Retail and Service Units	123	91
Public House	8	6
Medical Centre/General Practitioner		0
Community Use Building	1	1
Place of Worship		0
Other Community Uses	1	1
Miscellaneous Uses	2	1
TOTAL	135	100

- 4.74 From these figures it can be seen that Old Town has a high percentage of restaurants, public houses and hairdressers emphasising Old Town's role as a leisure destination.
- 4.75 Comparison shopping has in effect been squeezed by these other uses but the Centre does accommodate a diverse mix of independent businesses. The stock of retail premises generally provides small shop units that are not available in the Town Centre.

- 4.76 Overall, the diversity of units and the presence of independent and multiple retailers, and the presence of a robust retail service and leisure sector means the Centre provides range of services and facilities for local residents and is a destination in its own right.

Vacant Floorspace

- 4.77 At the time of the survey in September 2024, there were 8 vacant units identified which represents 6% of units. However, two of these units were in process of being refurbished to accommodate new occupiers.
- 4.78 The remaining vacant units in Old Town are predominantly very small units around Middle Row, where the floorspace configuration would only suit small businesses.
- 4.79 Overall, the vacancy rate is well below the national average and indicates strong demand from occupiers to locate into the Centre.

Pedestrian Flows within the Centre

- 4.80 The Centre benefits from a robust day-time and evening economy, and pedestrian flows were observed as being high during both the day-time and the evening.

Accessibility

- 4.81 The Centre is accessible for pedestrians and cyclists from the surrounding area and there is also a bus service along the High Street. The Centre is also accessible by car with restricted stay road side parking available within and adjacent to High Street and there are also two large car parks to the west of the centre at Primmet Road. Overall the Centre benefits from good accessibility.

Environmental Quality

- 4.82 The quality of the environment of Old Town is very good with a variety of highly individual building styles and shop fronts. Outside restaurant dining areas also contribute to enhancing the streetscape and the vibrancy of the Centre.
- 4.83 In parts of the Centre, vehicles along the High Street do diminish the quality of the environment, but overall the environmental quality within the Centre is a significant asset of the Centre which contributes to its vitality and viability.

Summary of Old Town Health Check

- 4.84 Overall Old Town displays very good levels of vitality and viability during the daytime and evening. The historic attributes and mix of uses contrasts with Stevenage Town Centre, and overall, the two areas are complimentary in their functions.

Poplars District Centre

- 4.85 Poplars District Centre is located in the east of the Borough and the Centre is dominated by a Sainsbury's superstore which has a trading floorspace of circa 3,620 sq m. During the Applied Planning survey in May 2024 approximately 80% of

the floorspace was dedicated to convenience goods and 20% comparison goods floorspace.

- 4.86 The Centre also contains a Public House, a Petrol Filling Station within a CTN and a car wash (also operated by Sainsbury's), as well as a pharmacy, takeaway and opticians. The Centre also contains community use buildings, being a General Practice Doctor's and two community buildings, one of which is the headquarters of Stevenage District Scouts.

Poplar Way	Number of Units
Foodstore	1
CTN/Off License	1
Comparison Goods	
Charity Shops	
Pharmacy	1
Opticians	1
Takeaways	1
Cafes/Restaurants	
Bookmakers	
Hairdressers/Beauticians	
Veterinary Clinic	
Vacancies	
Others	
Sub-Total Retail and Service Units	5
Public House	1
Medical Centre/General Practitioner	1
Community Use Building	2
Place of Worship	
Other Community Uses	
Miscellaneous Uses	
TOTAL	9

- 4.87 The size of the Sainsbury's Superstore means the Centre serves a much wider catchment area than the immediate neighbourhood, which justifies the Centre having a higher place in the retail hierarchy and being identified as a District Centre in the SBLP. We recommend that the Centre is maintained as a District Centre in the SBLPR at a higher place in the retail hierarchy than Local and Neighbourhood Centres.

- 4.88 The existing centre boundary is defined in the SBLP. The boundary includes all of the retail and community buildings located within the Centre as well as the petrol filling station, car wash and all of the car park associated with the Sainsbury's store. We consider that the existing centre boundary is appropriate and we do not recommend any changes.

- **Strengths** – The Centre has a large superstore which offers a comprehensive choice of goods for residents, which is complemented by community and

health buildings. Overall, the Centre provides a wide-ranging retail offer as well as community facilities.

- **Weaknesses** – The centre is dominated by the car park serving the Sainsbury's store which results in a poor and unwelcoming pedestrian environment. The community use buildings are located to rear of the Sainsbury's store and are not lack prominence from the principal access points into the Centre. In addition, due to the size of the Sainsbury's store and the wide-ranging retail offer, the Store diverts trade from other Neighbourhood and Local Centres

Bedwell Crescent Local Centre

- 4.89 Bedwell Crescent is a Local Centre located approximately 500m 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.
- 4.90 Bedwell Crescent contains ten units fronting onto the car park as well as a public house. Occupiers include Morrisons Daily (which was not present in the Centre during Applied Planning's survey for the 2014 Retail Study), as well as an independent supermarket, pharmacy, bakery, off license, hairdressers, bookmakers and takeaways. The Centre contains a good convenience goods and service offer to meet the day-to-day needs of residents. However, there are no comparison goods retailers within the Centre reflecting that the Centre primarily caters for day-day-to day shopping needs. There are no vacant units within the principal retail terraces.
- 4.91 The Centre also contains Bedwell Community Centre to the east of the car park which is a large community centre providing a range of facilities including a sports hall. There is also a second smaller community centre building (Sherma Batson Building) located to the north east of the car park.
- 4.92 To the north of the car park is a row of three single storey commercial units, occupied by an MOT garage, art studio and there is also one vacant unit within the row of units. There is also a separate single storey building occupied by Stevenage Home Start in the northern part of the Centre which due to the orientation of the building is detached from the retail core of the Centre.

Bedwell Crescent	Number of Units
Foodstore	2
CTN/Off License	1
Comparison Goods	
Charity Shops	
Pharmacy	1
Opticians	
Takeaways	3
Cafes/Restaurants	
Bookmakers	1
Hairdressers/Beauticians	1
Veterinary Clinic	
Vacancies (in rear commercial unit)	1
Others (bakery)	1
Sub-Total Retail and Service Units	10 (not including vacant commercial unit)
Public House	1
Medical Centre/General Practitioner	
Community Use Building	2
Place of Worship	
Other Community Uses	1
Miscellaneous Uses	2
TOTAL	17

4.93 The range of operators in the centre and community service facilities means that the Centre is in keeping with within it's role and function as a Local Centre as defined in the SBLP. We do not recommend any changes to the designation of Bedwell as a Local Centre within the retail hierarchy in the SBLPR.

4.94 The existing centre boundary of Bedwell Local Centre is defined in the SBLP. The existing defined boundary includes a 3-storey residential building and it's associated car park in the south west corner which is not a mixed use building and does not physically form part of the Centre with separate vehicular and pedestrian accesses. As part of the SBLP we recommended that the defined centre boundary of the Centre is revised to excluded this residential building.

- Strengths – The Centre has a good convenience goods range and basic services which cater for the day-to-day needs of residents and there are no vacancies within the main retail area.
- Weaknesses - The Centre is in need of repair and maintenance and the canopy diminishes the environmental quality of the Centre.

The Glebe Local Centre

- 4.95 The Glebe Local 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.
- 4.96 The Glebe contains 23 commercial units and provides a good and diverse range of convenience goods units including both multiples (Tesco Express), franchise (Simply Local) and independent specialist convenience goods stores. There is also a wide range of service uses including hairdressers, pharmacy, opticians and a veterinary clinic. In addition, there are specialist comparison goods stores selling hardware and bicycles. There are also a number of takeaways, cafes and restaurants which contribute to the diversity and vitality of the centre.
- 4.97 There are currently four vacant units in The Glebe, including a cluster of vacant units in the thoroughfare to the north east of the car park. This cluster of vacant units is viewed by pedestrians in context of the eastern non-commercial elevation of building number 22 (occupied by a restaurant) and cumulatively these inactive frontages diminish the quality of the Centre's environment as there is currently a zone with no active commercial frontages.
- 4.98 The defined Centre also includes Chells Enterprise Village located in the north east which is physically separated from the principle town centre area, as well as two community use buildings, a church and it's associated rectory.

The Glebe	Number of Units
Foodstore	3
CTN/Off License	1
Comparison Goods	2
Charity Shops	1
Pharmacy	1
Opticians	1
Takeaways	4
Cafes/Restaurants	2
Bookmakers	
Hairdressers/Beauticians	2
Veterinary Clinic	1
Vacancies	4
Others	1
Sub-Total Retail and Service Units	23
Public House	
Medical Centre/General Practitioner	
Community Use Building	2
Place of Worship	1
Other Community Uses	
Miscellaneous Uses	Chells Enterprise Village
TOTAL	26

4.99 Overall, the Centre has a strong retail and service offer which meets the day-to-day need of local residents. This offer is complemented by specialist comparison goods stores, which serve a wider catchment area. Applied Planning consider that the Glebe is a vital and viable Centre and the retail and service offer is in keeping with it's role and function as a Local Centre as defined in the SBLP. We do not recommend any changes to the designation of The Glebe as a Local Centre within the retail hierarchy in the SBLPR.

4.100 The existing Centre boundary as defined in the SBLP is in Appendix xx. The boundary includes all of the retail and community buildings located within the Centre as well Chells Enterprise Village. We consider that the existing centre boundary is appropriate and we do not recommend any changes.

- **Strengths** – There are a good range of convenience goods shops, and service uses which meet the day-to-day uses which are complemented by a specialist comparison goods retailers. The Centre has a diverse retail and service offer which offers good choice for residents.
- **Weaknesses** – There is a cluster of vacant units in the north eastern thoroughfare, which when viewed by pedestrians in context of the non-commercial elevations of surrounding buildings diminishes the quality of the centre environment.

The Hyde Local Centre

- 4.101 The Hyde is a Local 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 albeit a relatively large percentage (circa 20%) of the units are takeaways. This is relatively high proportion of floorspace which is an indicator of low retailer demand and has increased from 17% during our last survey in October 2012.
- 4.102 The Centre has three foodstores including a Co-operative and a foodstore specialising in Afro-Caribbean foods which meet the day to day need of residents as well as servicing a wider catchment area for specialist products. Applied Planning note that the comparison goods offer within the Centre has reduced since our survey in 2012 and a number of retailers comparison goods retailers which were present at that time no longer operate within the Centre.
- 4.103 Whilst the number of comparison goods retailers has reduced in the Centre, and there has been an increase in takeaways, there is currently only one vacant unit in the Centre and the centre is relatively healthy.

The Hyde	Number of Units
Foodstore	3
CTN/Off License	1
Comparison Goods	3
Charity Shops	1
Pharmacy	1
Opticians	
Takeaways	6
Cafes/Restaurants	3
Bookmakers	1
Hairdressers/Beauticians	3
Veterinary Clinic	
Vacancies	1
Others	5
Sub-Total Retail and Service Units	28
Public House	1
Medical Centre/General Practitioner	
Community Use Building	
Place of Worship	1
Other Community Uses	
Miscellaneous Uses	1 Brandt Kitchen Factory
TOTAL	30

- 4.104 Overall, the Centre has a good retail and service offer which meet the day-to-day need of local residents. This offer is complemented by some comparison goods stores, which would serve a wider catchment area. It is notable that there are less community uses than many other centres and there is no community centre or medical centre.
- 4.105 However, overall Applied Planning consider that The Hyde is a vital and viable Centre and the retail and service offer is in keeping with it's role and function as a Local Centre as defined in the SBLP. We do not recommend any changes to the designation of The Glebe as a Local Centre within the retail hierarchy in the SBLPR.
- 4.106 The existing centre boundary as defined in the SBLP. The boundary includes the Brandt Kitchen Factory/Supply Shop to the west and St Hilda's Church to the south which is severed from the main part of the centre by Hydean Way. We consider that the existing centre boundary is appropriate and we do not recommend any changes.
- **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.

Marymead Local Centre

- 4.107 Marymead is a Local Centre located towards the south of the town. The main parade of shops fronts onto a forecourt car park which contains approximately 40 spaces. A second cluster of single storey shops known as Willows Link is situated to the northeast of the main shopping area.
- 4.108 The Centre contains 13 retail/service units and is anchored by a Co-operative foodstore which meets the day-to-day shopping need of residents. Other than a charity shop, the Stevenage Reuse Scheme, the Centre does not contain any comparison goods floorspace.
- 4.109 The Centre does provide a well-balanced range of complementary uses including a pharmacy, takeaways and hairdressers. However, vacancy rates within the Centre remain very high and there are currently four vacant units which amounts to circa 30% of units, albeit three of these vacant units are located in the secondary shopping area. The level of vacant units was identified at similarly high levels in Applied Planning's 2012 survey and this long-term position is indicative of weaknesses in the Centre.

Marymead	Number of Units
Foodstore	1
CTN/Off License	1
Comparison Goods	
Charity Shops	
Pharmacy	1
Opticians	
Takeaways	3
Cafes/Restaurants	1
Bookmakers	
Hairdressers/Beauticians	1
Veterinary Clinic	
Vacancies	4
Others	1
Sub-Total Retail and Service Units	13
Public House	1
Medical Centre/General Practitioner	
Community Use Building	
Place of Worship	1
Other Community Uses	
Miscellaneous Uses (Nursery)	1
TOTAL	16

4.110 Marymead Centre is a relatively small Local Centre which contains 16 units in total, principally focused towards meeting the day-to-day needs of residents and notably contains no comparison goods retailers. Whilst Marymead is a relatively small local centre with a limited range of retailers and limited community use buildings, Applied Planning consider that due to the number of units in the Centre and the overall mix of services uses, that the retail and service offer is in keeping with it's role and function as a Local Centre as defined in the SBLP. We do not recommend any changes to the designation of Marymead as a Local Centre within the retail hierarchy in the SBLPR.

4.111 The existing centre boundary as defined in the SBLP. We consider that the existing centre boundary is appropriate and we do not recommend any changes.

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 persistently high percentage of vacant units which indicates weaknesses in the vitality and viability of the Centre. There is a notable cluster of vacancies within Willows Link which has limited visibility and pedestrian desire lines from the principal retail area. It is recommended that opportunities to improve the inter-relationship between these two areas are explored.

Oak Cross Local Centre

- 4.112 Oaks Cross Local Centre is 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.
- 4.113 The Centre contains nine commercial units alongside a church and public house and is the smallest of the defined Local Centres. A Premier Foodstore provides a basic convenience goods offer for residents, this is complemented by other uses including post office, a gift shop, pharmacy, betting shop, takeaways, beauticians and hairdressers. The Centre does not contain a Community Centre although there is a Church within the south east of the centre which is severed from the principal part of the Centre by Oak Cross Road. There are no vacant units within the Centre

Oak Cross	Number of Units
Foodstore	1`
CTN/Off License	
Comparison Goods	1
Charity Shops	
Pharmacy	1
Opticians	
Takeaways	3
Cafes/Restaurants	1
Bookmakers	1
Hairdressers/Beauticians	2
Veterinary Clinic	
Vacancies	
Others	
Sub-Total Retail and Service Units	9
Public House	1
Medical Centre/General Practitioner	
Community Use Building	
Place of Worship	1
Other Community Uses	
Miscellaneous Uses	
TOTAL	11

- 4.114 Oaks Cross is one of the smallest Local Centres containing nine retail/service units, alongside a church and a public house. Whilst Oaks Cross is a small Local Centre with a limited offer, Applied Planning consider that due to the number of units in the Centre and the overall mix of services uses that the retail and service offer is in keeping with it's role and function as a Local Centre as defined in the SBLP. We do not recommend any changes to the designation of Oaks Cross as a Local Centre within the retail hierarchy in the SBLPR.

4.115 The existing centre boundary as defined in the SBLP. Applied Planning consider that the existing centre boundary is appropriate and we do not recommend any changes.

- **Strengths** – The Centre has a top-up shopping convenience goods offer which is complemented by a range of service uses. There are no vacant units in the Centre.
- **Weaknesses** – A high proportion of the floorspace is occupied by takeaways, hairdressers and beauticians which is indicative of a low retail demand.

The Oval Local Centre

4.116 The Oval Local Centre is 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 environment.

4.117 The Centre contains 25 units which 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 Morrisons Daily, Co-operative, an international convenience store and butchers.

4.118 There are a number of specialist comparison goods retailers and other uses which draw trade from beyond the immediate catchment and include a hardware and a flooring retailer. There are also a wide range of complementary service uses including launderette, pharmacy, betting shop, hairdressers, beauticians and cafe. Only 15% (3no.) of the retail/service units are takeaways which is relatively low compared to the other Local Centres and there is only one vacant unit in the Centre.

The Oval	Number of Units
Foodstore	4
CTN/Off License	1
Comparison Goods	3
Charity Shops	1
Pharmacy	1
Opticians	
Takeaways	3
Cafes/Restaurants	1
Bookmakers	1
Hairdressers/Beauticians	3
Veterinary Clinic	
Vacancies	1
Others	1
Sub-Total Retail and Service Units	20
Public House	1
Medical Centre/General Practitioner	
Community Use Building	1
Place of Worship	3
Other Community Uses	
Miscellaneous Uses (Nursery)	
TOTAL	25

- 4.119 A hybrid planning application (reference: 23/00954/FPM) has been submitted to redevelopment The Oval Centre comprising:

‘An Outline Application for a mixed use development on parcels A,B and D to include 250 dwellings, 1200sqm of mixed commercial (Class E), Parking and public realm improvements including a New Market Square, up to 2650sqm of retail (Class E) and 220sqm mixed use (Class E and Sui Generis) and parking on Parcel C, and a Full Application for the Construction of 91 dwellings and shared communal facilities for Independent Living (Parcel E), community building including place of worship and public realm’

- 4.120 At this time of preparing this Study the application is awaiting determination, but this application broadly seeks a similar quantum of town centre uses floorspace which is currently at The Oval, including a proposed Limited Assortment Discounter. Applied Planning were consulted on this application by SBC and concluded that given the size and nature of the redevelopment proposals, the proposed development would maintain the retail hierarchy as whole and the redevelopment proposals at The Oval are appropriate to the size and role of the Centre in the retail hierarchy.

- 4.121 Therefore, in respect to the retail hierarchy, Applied Planning consider that due to the number of units in the centre and the overall mix of services uses that the retail and service offer is in keeping with it’s role and function as a Local Centre as defined in the SBLP. We do not recommend any changes to the designation of The

Oval as a Local Centre within the retail hierarchy in the SBLPR. We also consider that should planning permission 23/00954/FPM be granted in its current form, The Oval should continue to be designated as a Local Centre in the Retail hierarchy.

- 4.122 The existing centre boundary as defined in the SBLP. The boundary includes some uses which would not normally be including in a defined centre boundary including a Locally Equipped Area of Play (LEAP) to the north and a sub-station to the south. The Local Planning Authority may wish to review this boundary as part of SBLP Review, to exclude the LEAP, but it is noted that this area is subject to the redevelopment proposals. It is recommended that the boundary of the Centre is kept under review as part of the Plan Review process, taking account of the progress of planning application 23/00954/FPM in the intervening period.

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. There is an opportunity to improve the built environment of the Centre through the existing redevelopment proposals.

Weaknesses – At present, the internal nature of the centre creates an unwelcoming environment.

Roebuck Local Centre

- 4.123 Roebuck Centre is located in the south of Stevenage. The Centre consists of a parade of shops with flats above. The parade of shops consists of eight units and includes a One Stop convenience store, pharmacy, hairdressers and café as well as two comparison goods stores selling bicycles and catering supplies. Off street car parking is provided for approximately 37 cars to the south of the parade. The Centre also includes a General Practice Surgery to the west and a standalone vets to the north. Within the north western part of the centre is the former St Paul's Methodist Building which is vacant and currently for sale, and a residential complex.

Roebuck	Number of Units
Foodstore	1
CTN/Off License	
Comparison Goods	2
Charity Shops	
Pharmacy	1
Opticians	
Takeaways	
Cafes/Restaurants	1
Bookmakers	
Hairdressers/Beauticians	2
Veterinary Clinic	1
Vacancies	1
Others	1
Sub-Total Retail and Service Units	10
Public House	
Medical Centre/General Practitioner	1
Community Use Building	
Place of Worship	
Other Community Uses	
Miscellaneous Uses (Nursery)	
TOTAL	11

- 4.124 Roebuck is one of the smallest Local Centres containing eight units in the parade of shops, alongside a veterinary clinic, general practitioner doctors and a vacant church. Whilst Centre is a small Local Centre with a limited offer, Applied Planning consider that as a centre has a doctors and a veterinary clinic, the centre has a diverse offer beyond the core retail offer and is in keeping with it's role and function as a Local Centre as defined in the SBLP. We do not recommend any changes to the designation of Roebuck as a Local Centre within the retail hierarchy in the SBLPR.
- 4.125 The existing centre boundary is defined in the SBLP. This boundary includes the vacant former St Paul's Methodist Church as well as a residential complex to the west and an area of open space with tree planting to the south. The residential use and open space to the south is detached from the commercial element of the centre, and is residential in character, and does not physically form part of centre with separate vehicular and pedestrian accesses. As part of the SBLPR we recommended that the defined centre boundary of the Centre is revised to excluded this residential building and the open space to the south. During the Plan Review process it is also recommended that the Local Planning Authority keep under review any redevelopment proposals that may come forward at the former St Paul's Methodist Church. If for instance, this building were to be converted to residential uses during the Plan Review process, it may also be appropriate to exclude this building from the defined centre boundary.

Strengths – There are a range of shops and supporting community uses which meet the day-to-day needs of residents.

Weaknesses – The size of the foodstore which anchors the Centre is limited relative to other Local Centres

Canterbury Way Neighbourhood Centre

- 4.126 Canterbury Way Centre is Neighbourhood Centre located in the north east of Stevenage. The Centre contains two retail units, a Morrisons Daily Supermarket and a pharmacy, as well as a public house, health centre and community centre. There are no vacant units.
- 4.127 The Morrisons Daily is a local store which sells convenience goods that serves a top-up retail function. The Morrisons has occupied the Centre since the preparation of 2014 Retail Study through the amalgamation of two units which were previously occupied by Londis and Martins CTN.
- 4.128 The Centre has a strong convenience goods offer which is appropriate to it’s role and function in the retail hierarchy and the pharmacy, public house, health centre and community centre also provide important day-to-day facilities for local residents and contribute to the vitality of the centre.

Canterbury Way	Number of Units
Foodstore	1
CTN/Off License	
Comparison Goods	
Charity Shops	
Pharmacy	1
Opticians	
Takeaways	
Cafes/Restaurants	
Bookkeepers	
Hairdressers/Beauticians	
Vacancies	
Sub-Total Retail and Service Units	2
Public House	1
Veterinary Clinic	
Medical Centre/General Practitioner	1
Community Use Building	1
Place of Worship	
Other Community Uses	
TOTAL	5

- 4.129 Canterbury Way is defined as a Neighbourhood Centre with the existing retail hierarchy in the SBLP. The Centre has a strong offer of community uses including a General Practitioner Doctors, community centre, and public house. However, given

that there are only two retail units within the Centre, Applied Planning consider the overall retail and service/community building offer is in keeping with it's role and function as a Neighbourhood Centre as defined in the SBLP. We do not recommend any changes to the designation of Canterbury Way as a Neighbourhood Centre within the retail hierarchy in the SBLPR.

4.130 The existing centre boundary is defined in the SBLP. Applied Planning consider that the existing centre boundary is appropriate and we do not recommend any changes.

- **Strengths** - The Centre has a strong convenience goods shopping offer as well as community facilities, health facilities and a public house. It is robust centre which provides a top-up shopping offer, as well as community facilities for local residents. There are also no vacancies within the centre, and the retail canopy has been enhanced since the 2014 Study which alongside enhanced planting and street furniture within the pedestrianised public realm has enhanced the quality to the environment within the centre.
- **Weaknesses** – The retail function and vitality and viability of the Centre is underpinned by one shop, Morrisons Daily, which may be susceptible to competition from large format superstores. We recommend that particular attention is given to the impact that any future retail proposals may have on the vitality and viability of the Centre.

Chells Manor Neighbourhood Centre

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

4.132 The Centre contains five retail/service units; a Costcutter, off licence, two take-aways and a pharmacy. There is an adjacent public house, general practitioner doctors and community centre.

Chells Manor	Number of Units
Foodstore	1
CTN/Off License	1
Comparison Goods	
Charity Shops	
Pharmacy	1
Opticians	
Takeaways	2
Cafes/Restaurants	
Bookmakers	
Hairdressers/Beauticians	
Veterinary Clinic	
Vacancies	
Others	
Sub-Total Retail and Service Units	5
Public House	1
Medical Centre/General Practitioner	1
Community Use Building	1
Place of Worship	
Other Community Uses	
Miscellaneous Uses (Nursery)	
TOTAL	8

4.133 Chells Manor has a strong offer of community uses including a doctor’s, community centre, and public house. However, there is only a small foodstore, off-licence, pharmacy and takeaways within the Centre. Applied Planning consider the overall retail and service/community building offer is in keeping with it’s role and function as a Neighbourhood Centre as defined in the SBLP. We do not recommend any changes to the designation of Chells Manor as a Neighbourhood Centre within the retail hierarchy in the SBLPR.

4.134 The existing centre boundary is defined in the SBLP. Notably the defined boundary excludes the existing public car park which serves the centre to the north and the car park which serves the public house. As these uses are integral to the Centre it is recommended that the centre boundary is extended to include these car parks. There is also an area of landscaping to the south west of the public house which is used as a beer garden, it is unclear whether this use of lawful, but it is also suggested that the Local Planning Authority consider extending the boundary of the Centre to include this land which is being used as beer garden which is linked to the associated uses within the Centre.

- **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.

Filey Close Neighbourhood Centre

- 4.135 Filey Close is located in the north east of Stevenage and since the previous 2014 Retail Study has benefited from redevelopment proposals pursuant to planning permission reference 16/00395/FPM.
- 4.136 The Centre now contains a Nisa Supermarket, pharmacy, two takeaways, two hairdressers, a florists, a fishing tackle shop and a public house. The Centre also contains a general practitioners doctors and a community centre.

Filey Close	Number of Units
Foodstore	1
CTN/Off License	
Comparison Goods	1
Charity Shops	
Pharmacy	1
Opticians	
Takeaways	2
Cafes/Restaurants	
Bookmakers	
Hairdressers/Beauticians	2
Veterinary Clinic	
Vacancies	
Others	1
Sub-Total Retail and Service Units	8
Public House	1
Medical Centre/General Practitioner	1
Community Use Building	1
Place of Worship	1
Other Community Uses	
Miscellaneous Uses	
TOTAL	12

- 4.137 Filey Close Centre is designated as Neighbourhood Centre in the SBLP. However, since the preparation of the 2014 Retail Study, the Centre has undergone redevelopment and now has a better representation of retail facilities including Nisa Supermarket which provides a reasonable top-up shopping offer. Whilst there are only eight retail/service units in the Centre, the Centre contains a strong range of Community Uses. Having regard to the wider range of community uses and the improved retail offer within the Centre, we recommend that Filey Close is redesignated as a Local Centre within the SBLPR (albeit the Centre would be one of

the smallest Local Centres in the retail hierarchy).

- 4.138 The existing centre boundary as defined in the SBLP. The defined centre includes a residential building known as Somerton Court which is physically detached from the wider centre and is a separate residential use. It is recommended that the defined centre boundary is amended to exclude this residential building.
- **Strengths** – The Centre has a convenience offer which meets the day-to-day need of residents which is complemented by service and takeaway uses. The centre has a wide range of community uses for a Centre of it's size.
 - **Weaknesses** – The Centre is anchored by Nisa Supermarket which may be susceptible to competition from competing retailers. We recommend that particular attention is given to the impact that any future retail proposals may have on the vitality and viability of this store.

Hydean Way Neighbourhood Centre

- 4.139 Hydean Way is a Neighbourhood Centre and comprises a parade of five retail/service units fronting onto a car park with approximately 17 spaces. The centre also includes a public house and it's associated car park to the west of Valley Way Road. The Centre is in good condition with generally attractive landscaping and facades. The Centre contains a Morrisons Daily foodstore, two takeaways, a beautician and a vets. The Centre does not contain any community use buildings.

Hydean Way	Number of Units
Foodstore	1
CTN/Off License	
Comparison Goods	
Charity Shops	
Pharmacy	
Opticians	
Takeaways	2
Cafes/Restaurants	
Bookmakers	
Hairdressers/Beauticians	1
Veterinary Clinic	1
Vacancies	
Others	
Sub-Total Retail and Service Units	5
Public House	1
Medical Centre/General Practitioner	
Community Use Building	
Place of Worship	
Other Community Uses	
Miscellaneous Uses	
TOTAL	6

4.140 Hydean Way is defined as Neighbourhood Centre with the existing retail hierarchy in the SBLP. We do not recommend any changes to the designation of Hydean Way as a Neighbourhood Centre within the retail hierarchy in the SBLPR.

4.141 The existing centre boundary is defined in the SBLP. Applied Planning consider that the existing centre boundary is appropriate and we do not recommend any changes.

Strengths - The Centre is fully occupied and the Morrisons Daily sells a reasonable range of convenience items providing a top-up shopping offer to local residents.

4.142 **Weaknesses** – Four of the five units are occupied by non-retail tenants. The Centre is anchored by Morrisons Daily which may be susceptible to competition from competing retailers. We recommend that particular attention is given to the impact that any future retail proposals may have on the vitality and viability of this store.

Mobbsbury Way Neighbourhood Centre

4.143 Mobbsbury Way is located in the north-east of Stevenage and is designated as a Neighbourhood Centre. 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.

- 4.144 The Centre contains a Best One foodstore, two takeaways and two hairdressers/beauticians. There are no community use buildings.

Mobbsbury Way	Number of Units
Foodstore	1
CTN/Off License	
Comparison Goods	
Charity Shops	
Pharmacy	
Opticians	
Takeaways	2
Cafes/Restaurants	
Bookmakers	
Hairdressers/Beauticians	2
Veterinary Clinic	
Vacancies	
Others	
Sub-Total Retail and Service Units	5
Public House	
Medical Centre/General Practitioner	
Community Use Building	
Place of Worship	
Other Community Uses	
Miscellaneous Uses	
TOTAL	5

- 4.145 Mobbsbury Way is defined as Neighbourhood Centre with the existing retail hierarchy in the SBLP. We do not recommend any changes to this designation within the retail hierarchy in the SBLPR.
- 4.146 The existing centre boundary is defined in the SBLP. Applied Planning consider that the existing centre boundary is appropriate and we do not recommend any changes

Strengths - The Centre is fully occupied and the foodstore meets some of the day-to-day top-up shopping needs of residents.

Weaknesses – Four of the five units are occupied by non-retail tenants. The Centre is anchored by Best One which may be susceptible to competition from competing retailers. We recommend that particular attention is given to the impact that any future retail proposals may have on the vitality and viability of this store.

Popple Way Neighbourhood Centre

- 4.147 Popple Way Local 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 comprising a

CTN, two takeaways, a café and a tuition centre. There are no Community or Health Centres associated with this Centre. There are no vacant units.

Popple Way	Number of Units
Foodstore	
CTN/Off License	1
Comparison Goods	
Charity Shops	
Pharmacy	
Opticians	
Takeaways	2
Cafes/Restaurants	1
Bookmakers	
Hairdressers/Beauticians	1
Veterinary Clinic	
Vacancies	
Others	1
Sub-Total Retail and Service Units	6
Public House	
Medical Centre/General Practitioner	
Community Use Building	
Place of Worship	
Other Community Uses	
Miscellaneous Uses	
TOTAL	5

- 4.148 Popple Way is defined as Neighbourhood Centre with the existing retail hierarchy in the SBLP. We do not recommend any changes to this designation within the retail hierarchy in the SBLPR.
- 4.149 The existing centre boundary as defined in the SBLP. Applied Planning consider that the existing centre boundary is appropriate and we do not recommend any changes
- **Strengths** – The Centre meets some of the day-to-day needs of residents.
 - **Weaknesses** – There is a limited convenience goods offer in the Centre and the Centre is dominated by takeaways and cafes.

Rockingham Way Neighbourhood Centre

- 4.150 Rockingham Way Centre is located close to the centre of Stevenage and comprises 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.
- 4.151 The Centre contains a Premier Convenience foodstore, café, two takeaways and a hairdressers. There are no vacant units of community use buildings.

Rockingham Way	Number of Units
Foodstore	1
CTN/Off License	
Comparison Goods	
Charity Shops	
Pharmacy	
Opticians	
Takeaways	2
Cafes/Restaurants	1
Bookmakers	
Hairdressers/Beauticians	1
Veterinary Clinic	
Vacancies	
Others	
Sub-Total Retail and Service Units	5
Public House	
Medical Centre/General Practitioner	
Community Use Building	
Place of Worship	
Other Community Uses	
Miscellaneous Uses	
TOTAL	5

4.152 Rockingham Way is defined as Neighbourhood Centre with the existing retail hierarchy in the SBLP. We do not recommend any changes to this designation within the retail hierarchy in the SBLPR.

4.153 The existing centre boundary as defined in the SBLP is in Appendix xx. The defined boundary extends south and includes a three-storey residential building (Twin Foxes House) which is physically detached from the town centre uses within the Centre. It is recommended as part of the SBLPR that the defined centre boundary of the Centre is revised to exclude this residential building.

- **Strengths** – All the units are occupied and the Centre meets some of the day-to-day top-up shopping requirements of residents.
- **Weaknesses** – There is a limited convenience goods offer in the Centre and the Centre is dominated by takeaways and cafes.

5 CONVENIENCE SHOPPING

- 5.1 The supermarket/superstore convenience goods offer has remained relatively consistent since the 2014 Retail Study. The principal superstores (stores having more than 2,500 sq.m. trading floorspace) have remained unchanged. These are:

Unchanged Large Format Stores

- Tesco Extra, The Forum, Stevenage Town Centre which has a trading floorspace of circa 4,925 sqm.
- ASDA, Monkswood Way, which is an out of centre store to the south of Stevenage Town Centre, and has a trading floorspace of circa 6,666 sq m.
- Sainsbury's, Coreys Mill on Hitchin Road is in an out of centre location within the north west of Stevenage and has a trading floorspace of circa 3,575 sq m.
- Sainsbury, Poplars District Centre is an in-centre store with a trading floorspace of circa 3,620 sq m.
- Tesco, Broadwater Retail Park is an out of centre store in the south west of the Borough. The store has a trading floorspace of circa 3,507 sq m.

New Large Format Stores

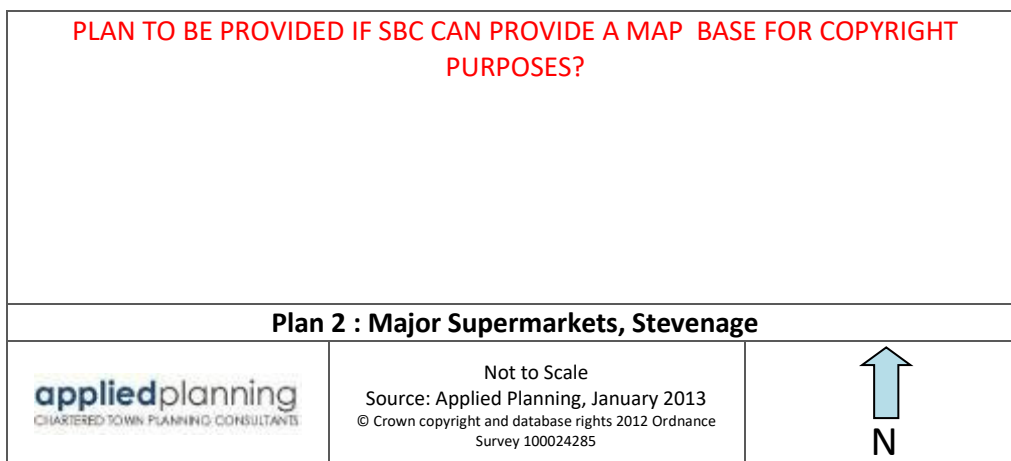
- 5.2 A major addition to the convenience goods offer within Stevenage since the 2014 Study is the delivery of the Costco on Cavendish Road Stevenage which is an out of centre location. The Retail Impact Assessment which supported the planning applications advises that 35% of the turnover would be for 'individual membership sales' and of this 35%, 65% would be convenience goods sales and 35% comparison goods sales. The gross retail floorspace of the unit is 14,429 sq m on the basis of the application form. Applied Planning have assumed that the building operates at a 70% gross floorspace to net floorspace trading ratio which equates to a 10,100 sq m net. If turnover is directly proportioned to floorspace and all floorspace has the same trading density, 22.75% of this floorspace would be dedicated to convenience goods. This equates to 2,298 sq m of convenience goods floorspace.
- 5.3 Marks and Spencer have also located into Unit 5 at the out-of-centre Roaring Meg Retail Park since the 2014 Study. The Marks and Spencer provides both a convenience and comparison goods offer and condition 3 of planning permission 21/00260/FPM allows for up to 1,647 sq m of to be dedicated to convenience goods sales within the unit.
- 5.4 In addition, Iceland Food Warehouse has also occupied a unit in Monkswood Retail Park, which has a trading floorspace of circa 900 sq m of convenience goods.

Extended Large Format Stores

- 5.5 The only supermarket to be extended since the 2014 Study is Aldi Fairlands Way, which is an edge of centre location to the north of Stevenage Town Centre. The works are currently ongoing and the trading floorspace of the store will increase from 870sq m to 1,229 sq m following the completion of works pursuant to the implementation of planning permission 23/00736/FP.

Large Format Convenience Retail Losses

- 5.6 The in-centre Waitrose Store at High Street, Old Town has ceased trading since the 2014 Study which previously provided 1,348 sq m of convenience goods trading floorspace.
- 5.7 In addition Marks and Spencer previously traded both convenience and comparison goods from their premises in Stevenage Town Centre, and this unit no longer trades within the Town Centre. Farmfoods and Iceland have also both ceased trading in Stevenage Town Centre since the 2014 Study. However, the number of independent small convenience retailers have increased in the Town Centre over the intervening period, helping maintain the overall offer.



- 5.8 In general Stevenage continues to be well served by a choice of food shopping destinations catering for both main and top-up shopping.

6 OUT OF CENTRE RETAIL PARKS

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

Plan can be provides if SBC can provide a base layer for copyright purposes?		
Plan 3: Retail Parks, Stevenage		
 <small>appliedplanning</small> <small>CHARTERED TOWN PLANNING CONSULTANTS</small>	Not to Scale Source: Applied Planning, January 2013 © Crown copyright and database rights 2012 Ordnance Survey 100024285	 N

Roaring Meg North

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

6.3 Since the 2014 Retail Study, the number of units in the Roaring Meg North has increased through the development and reconfiguration of units. Concurrently, planning conditions have been varied on a number of the existing units to increase the range of goods which can be sold to facilitate the relocation of existing multiple retailers from the Town Centre.

6.4 As a result of this, the number of retailers and range of goods on sale at Roaring Meg North has evolved significantly over the last 10 years. The Table below set out the retailers which were present at Roaring Meg in 2014, relative to position in Autumn/Winter 2024.

Table xx: Roaring Meg North Occupiers 2014 and 2024

Roaring Meg North Occupiers	
Occupiers 2014	Occupiers 2024
Wren Kitchens	Marks and Spencers
Boots	TK Maxx/Homesense
Currys	Sports Direct/USC
DFS	Smyths Toy Superstore
Homebase	Wren Kitchens
Harveys	Dreams
ScS	Furniture Village
Carpetright	Sharps Furniture
Oak Furniture Land	Oak Furniture Land
Argos	Benson for Beds
Gambardo	Boots
Paul Simon	Tapi Carpets
Hobbycraft	ScS
Toys R Us	DFS
Fitness First	Hobbycraft
Pizza Hut	Currys
Burger King	TruGym
Costa Coffee	Costa Coffee
Harvester	Burger King
	Nandos
	Miller and Carter

- 6.5 Table xx identifies that the range of goods being sold from Roaring Meg North has increased over the last 10 years, and notably a number of retailers which were previously in the Town Centre (Marks and Spencer, TK Maxx and Sports Direct), have relocated to Roaring Meg North.
- 6.6 The enhanced offer within Roaring Meg North will inevitably result in increased competition with the Town Centre, and it is recommended that the impact of any future expansion or relaxation on the range of goods which can be sold from the Retail Park is carefully considered by Local Planning Authority, both in terms of the impact on the vitality and viability of defined centres and potential impacts on existing, committed and planned public and private investment.

B&Q

- 6.7 On the opposite side of London Road from Roaring Meg North is a large freestanding B&Q.

Roaring Meg South

- 6.8 Roaring Meg South is located to the south west of Monkwood Way/Broadhall Way Roundabout. The Park contains two retail units which are occupied by Wickes and The Range. These units are unchanged since the 2014 Retail Study. In addition, there is a car wash on the site. A KFC drive-through has been developed on the site in recent years, which is a new occupier since the 2014 Study.

Monkwood Retail Park

- 6.9 Monkwood Retail Park is immediately to the north of Roaring Meg North. As of Autumn 2024, the occupiers are The Food Warehouse, Home Bargains, Mattressman, Topps Tiles, Jolleys (Pets) and a McDonalds drive-through. At the time of the survey, an electric vehicle parking hub was under construction within the Retail Park.

Oaklands Retail Park

- 6.10 Oaklands Retail Park has been delivered since the 2014 Retail Study and is located to the west of London Road opposite Roaring Meg North. The Retail Park contains three units and current occupiers are B&M Homestore and Cancer Research UK. At the time of the survey there was one vacant unit, which was formerly occupied by Carpetright.

Roebuck Retail Park

- 6.11 Roebuck Retail Park is located to the west of London Road to the south of the A602. As of Autumn 2024, the occupiers were Halfords, CareCo, Enfield Electrical Supplies, Leaner Life Gym, American Golf, In 'n' Out Autocentre and Sure Store. At the time of the survey there was one vacant unit in the Retail Park. There is also a Dunelm immediately to the south of the Retail Park which was also present at the time of the 2014 Study.

The Firs

- 6.12 The is a small Retail Park occupied by Aldi, Majestic Wine and Pets at Home and these occupiers are unchanged since the 2014 Study. The site is to the north of Fairlands Way and is connected to the Town Centre by a pedestrian/cycle underpass. At the time of the survey works were ongoing to extend the Aldi.

7 RETAIL NEEDS ASSESSMENT

- 7.1 In regard to Plan-making paragraph 20 of the NPPF 2023 states that strategic policies should set an overall strategy and should make sufficient provision for retail, leisure and other commercial development. Paragraph 31 also confirms that the preparation and review of all policies should be underpinned by relevant and up-to-date evidence which is proportionate, tightly focused and supporting and justifying the policies concerned, and take account of relevant market signals.
- 7.2 The Brief from SBC for this Retail Study Update requires Applied Planning to undertake a high-level assessment, and review the quantitative need for convenience and comparison floorspace, over the plan period to 2031 utilising the original baseline needs assessment data within the Applied Planning 2014 Retail Study.
- 7.3 The decision to use the same baseline needs assessment data as the SBLPR consists of a Partial Review and Update of the SBLP. As such, the scope of the review to policies and supporting text is limited to factual and necessary changes only, related to key drivers of change since the SBLP was adopted in 2019.
- 7.4 The 2014 Retail Study utilised population growth and long terms expenditure per capita growth projections for the period from 2014-2031. As the plan period will not change and remains to 2031, the population growth data which underpins the SBLP will not change, and the SBLPR is within the time period of the long- term population and expenditure growth projection timeframes utilised within the 2014 Retail Study.
- 7.5 Applied Planning consider it is proportionate and appropriate to use the baseline need assessment in the 2014 Retail Study to underpin the need assessment in the SBLPR. This approach is considered proportionate and a full review of retail needs will be undertaken at the next stage of the Local Plan Review, a Full Review of the Plan, from 2025.
- 7.6 The key factual drivers of changes which are necessary to consider within the Retail Needs Assessment Update are the material changes in retail floorspace supply which have occurred, and commitments which have come forward since the preparation of the 2014 Retail Study. The retail floorspace which has been delivered and lost, as well as the retails commitments which are reasonably expected to be delivered to 2031, represent factual changes to the baseline Retail Needs Assessment since the 2014 Retail Study.
- 7.7 As such it is proportionate and appropriate to undertake an assessment of retail commitments, gains and losses since the preparation of the 2014 Study, to assess the extent to which the identified retail quantitative need has been delivered thus far in plan period, and to assess any implications that delivered retail floorspace supply and losses must have on the formulation of policies in the SBLPR.
- 7.8 Accordingly, Applied Planning have undertaken an assessment of:

1. Convenience Floorspace gains including delivered floorspace and commitments since 2014.
2. Convenience Floorspace losses including commitments since 2014.
3. Comparison Floorspace gains including delivered floorspace and commitments since 2014.
4. Comparison Floorspace losses including commitments since 2014.

THE BASELINE

7.9 The Stevenage Retail Study 2014 identified that in respect to comparison goods floorspace:

- Over the plan period to 2031, there is no quantitative need for additional comparison goods floorspace until 2026 and by 2031 there is a quantitative need for 4,691 sq m net of comparison goods floorspace.
- Increased available comparison goods spending over the plan period should primarily be used to improve the retail efficiency of existing floorspace.
- There was 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. Applied Planning were of the opinion that SBC 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.
- Whilst the 2014 Study did not identify a short term quantitative need for additional comparison goods floorspace across the Borough, we were of the opinion that there was a qualitative need to enhance the Town Centre. Our view was that redevelopment of part of the Centre to provide better retail floorspace and retail environment would be preferable to an extension to the existing Town Centre

7.10 In respect to convenience goods floorspace, the Stevenage Retail Study 2014 identified that:

- Over the plan period to 2031, there is a quantitative need for 7,612 sq m net of convenience goods floorspace.
- Applied Planning recommended that at least 20% of this convenience floorspace needs be reserved to allow for extensions to existing convenience stores particularly in Local Centres where the provision of local services should be preserved and strengthened.
- We recommended that the local planning authority should plan positively for this identified convenience goods need and allocate a site in the emerging

Local Plan (subsequently the SBLP). It was 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. It was recommended that that when considering potential sites, SBC 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 recommended that SBC consider potential sites in the east of Stevenage.

7.11 Having regard to the evidence base provided by the 2014 Retail Study, the SBLP includes the following policies:

- Policy SP4 criterion C acknowledges a need for 4,700 sq m net of additional goods comparison goods floorspace and states that this will be directed to the Town Centre and will be provided through the regeneration of the town centre and the Major Opportunity Areas.
- Policy SP4 criterion D acknowledges a need to 7,600 sq m net of additional convenience goods floorspace with the Borough boundary. The policy requires that this floorspace be delivered through:
 - o 1,500 sq m net of this floorspace being provided by extensions to existing centres in in the retail hierarchy, then other stores in accordance with the sequential test;
 - o A Local Centre in the west of Stevenage development in the order of 500m² to meet the day-to-day needs of the residents of the new neighbourhood;
 - o A Local Centre in the north of Stevenage development in the order of 500m² to meet the day-to-day needs of the residents of the new neighbourhood;
 - o A Neighbourhood Centre in the south-east of Stevenage development of no more than 500m² with a convenience store
 - o A new allocation for a large new store, in the order of 4,600m² net convenience goods floorspace and 920m² net comparison goods floorspace, at Graveley Road to meet identified needs post-2023.

Changes in Floorspace Supply since 2014

7.12 Applied Planning have undertaken an assessment of all convenience and comparison goods retail floorspace planning permission and retail floorspace losses since 2014 (i.e. the evidence baseline of the 2014 Retail Study) using the SBC's monitoring databases.

- 7.13 The convenience goods floorspace retail floorspace gains/losses are set out in **Appendix 1 Table 1** and the comparison goods retail floorspace gains/losses are set out in **Appendix 2 Table 2**. In summary the analysis demonstrates that:

Convenience Goods

- 5,535 sq m net of convenience goods floorspace has been delivered or is committed since 2014.
- No losses of convenience floorspace have been identified since 2014.
- Therefore since 2014, 5,535 sq m net of convenience net of additional floorspace has been delivered or is committed.

Comparison Goods

- 9,125 sq m net of comparison goods floorspace has been delivered or is committed since 2014.
- 20,602 sq m net of comparison goods floorspace has been lost or is committed to be lost since 2014.
- Therefore since 2014, there has been a net loss of 11,476 sq m net of comparison goods floorspace.

- 7.14 As such, taking account of the identified quantitative needs figures from the 2014 Retail Study from 2014-2031 and accounting for changes in the supply of the floorspace in the intervening period and existing commitments, for the rest of the plan period (2024 -2031), a capacity is identified for:

- **2,078 sq m net of convenience goods floorspace**
- **16,167 sq m net of comparison goods floorspace**

- 7.15 In interpreting these headline capacity figures, it is necessary to give consideration to the qualitative distribution of the floorspace supply which has come forward in the plan period to date. The following factors are of relevance in the interpretation of the retail capacity figures and the formulation of policy.

Convenience Goods Qualitative Supply Factors

- In order of 4,000 sq m net of convenience goods floorspace has been delivered in two new foodstores being Costco Cavendish Road and Marks and Spencer's Roaring Meg Retail Park. Collectively these stores provide in the order of the 4,600 sq m net of convenience floorspace in a 'large new store' in accordance with Policy SD4 D criterion v of the SBP.
- Planning application reference 21/00356/FPM for up to 1,100 dwelling units which includes a neighbourhood centre with up to 900 sq m Use Class E/F2 Space to the west of Stevenage is currently being determined by the

Local Planning Authority. This emerging proposal is in broad accordance with Policy SP4 D criterion ii of the SBLP.

- Reserved matters application 23/00393/FPM has been granted by the Council for new a neighbourhood centre to the north of Stevenage in accordance with Policy SP4 of the SBLP in accordance with Policy SP4 D criterion iii of the SLP
- A planning application is yet to submitted for the proposed urban extension to the south east of Stevenage which Policy SP4 criterion iv identifies would contain a foodstore of no more than 500m2 with a convenience store.

Comparison Goods Qualitative Supply Factors

- It is notable that a significant proportion of the comparison goods floorspace which has been lost since 2014 is from Stevenage Town Centre as a result of residential-led mixed use redevelopment proposals. The 2014 Retail Study recommended that through the plan-making process the enhancement of secondary retail areas within the Town Centre be facilitated. The redevelopment of Stevenage Town Centre is ongoing, but Applied Planning recommend that the further loss of any comparison goods floorspace in the Town Centre is considered as material consideration in any future planning applications.
- Since 2014 there has been a significant increase in the supply of comparison goods retail floorspace the out-of-centre Roaring Meg Retail Park, including Units, 2A, 4A, 4C, 5 and 7B which equate to 6,145 sq m net of comparison floorspace, being approximately two-thirds of new comparison goods floorspace which has been delivered since 2014.

7.16 This factors and the implications for Development Plan policy are considered in the Policy Recommendations Section of this Study.

8 CONCLUSIONS AND POLICY RECOMMENDATIONS

- 8.1 The purpose of the Retail Study Update is to provide a refresh of the 2014 Study for the purposes of the SBLPR and to focus on the key drivers of change.
- 8.2 The purposes of the Study are specifically to provide:
- An update on National / Local Policy and Legislation;
 - An update on the baseline position including updated health checks of defined centres, a review of the role and function of centres and the retail hierarchy and updated information on out of centre retail parks, supermarkets and SG1;
 - A review of the baseline need analysis in the 2014 Study and a review of commitments and new facilities since the publication of 2014 and contributions that have been delivered towards identified quantitative and qualitative needs in the plan period to 2031.
 - A review of the current Local Plan policies including the retail hierarchy, Primary and Secondary Retail Shopping Frontages, Defined Centre Boundaries and locally set retail and leisure impact assessment thresholds
 - Recommendations for Development Plan Policy within the SLPR.
- 8.3 We set out are recommended strategy for the defined centres below having regard to the assessments within this Study.

Stevenage Town Centre and the Major Opportunity Areas

- 8.4 The Council is currently, in partnership with the development industry, pro-actively progressing a series of mixed-use regeneration projects, as well as new public transport infrastructure improvements, as part of positive strategy for the growth and adaption of Stevenage Town Centre. This is a long-term strategy and the implementation of this strategy and the adaption of the Town Centre will extend well beyond the plan period to 2031
- 8.5 In total, six Major Opportunity Areas have been identified in the Town Centre and there are individual SBLP polices (policies TC2-TC7) for each of these areas to encourage mixed use development with the purpose of adapting Stevenage to become a destination centre with an 'extended day offer' that meets the needs and aspirations of the its catchment.
- 8.6 These Major Opportunity Areas policies provide an important role in facilitating the Town Centre Strategy, are soundly based, and have been positively prepared to provide certainty to the development industry and set out the guiding principles for delivering the Strategy.

- 8.7 Whilst planning permissions have been granted for a number of proposals in the Major Opportunity Areas, this regeneration strategy is ongoing. Therefore, the retention of these policies in the SBBLPR is considered necessary to continue to guide future planning applications, including reserved matters applications.
- 8.8 However, some parts of these policies are out of date as on 1st September 2020, the Use Class Order was significantly amended. The update to the Town and Country Planning (Use Classes) Order 1987 created Class E which combines shops, restaurants, offices, gyms and nurseries (amongst others) that no longer require planning permission to switch uses.
- 8.9 It is therefore recommended that Policies TC2-TC7 are retained in the SBLPR as the policies remain necessary and justified to continue to guide future development proposals. However, these policies should be updated to reflect Use Class E, and the flexibility that this Use Class provides.

Retail Needs and Retail Capacity

- 8.10 In regard to plan-making paragraph 20 of the NPPF 2023 states that strategic policies should set an overall strategy and should make sufficient provision for retail, leisure and other commercial development. Paragraph 31 also confirms that the preparation and review of all policies should be underpinned by relevant and up-to-date evidence which is proportionate, tightly focused and supporting and justifying the policies concerned, and take account of relevant market signals.
- 8.11 The review of policies is limited to necessary changes, and other wider changes will be considered for the next stage of the Local Plan Review, a Full Review of the Plan, from 2025 onwards.
- 8.12 The headline figures are:
- Since 2014, being the base year of 2014 Retail Study, 5,535 sq m net of convenience net of additional floorspace has been delivered or is committed within Stevenage Borough.
 - Since 2014, there has been a net loss of 11,476 sq m net of comparison goods floorspace within Stevenage Borough.
- 8.13 This gives rise to a theoretical capacity for the rest of the plan period (2024 -2031), for:
- 2,078 sq m net of convenience goods floorspace
 - 16,167 sq m net of comparison goods floorspace
- 8.14 However, whilst these capacity requirements are of some relevance, they represent a snapshot in time taking account of planning permissions that have been granted at this current time, as part of the Stevenage Town Centre regeneration Strategy.

- 8.15 It is important to consider not just the headline figures, but the underlying trends, the performance of Stevenage Town Centre, the migration of retailers, and the progress of the Town Centre regeneration strategy.
- 8.16 The existence of theoretical capacity is not determinative in considering planning applications for additional retail outside of centres. Instead, there is a clear requirement of national planning policy to consider the impacts arising from town centre uses planning applications, and whether proposals comply with the sequential test, in accordance with the NPPF and the Development Plan.
- 8.17 In this context, we consider the policy implications for the theoretical convenience and comparison goods capacity below.

Convenience Goods Capacity

- 8.18 Taking account of the identified quantitative needs figures from the 2014 Retail Study from 2014-2031, and accounting for changes in the supply of the floorspace in the intervening period and existing commitments, for the rest of the plan period (2024 -2031), a capacity is identified for 2,078 sq m net of convenience goods floorspace.
- 8.19 Policy SP4 criterion D identifies a capacity for up to 7,600 sq m net of additional convenience goods floorspace with the Borough boundary. It is recommended that this policy is updated to support the provision of 2,078 sq m of floorspace.
- 8.20 Policy SP4 goes on to state how the identified capacity would be met.
- 8.21 Reserved matters application 23/00393/FPM has been granted by the Council for a new neighbourhood centre to the north of Stevenage in accordance with Policy SP4 of the SBLP in accordance with Policy SP4 D criterion iii of the SBLP. Criterion SP4 D criterion iii can therefore now be deleted.
- 8.22 Planning application reference 21/00356/FPM which includes a neighbourhood centre with up to 900 sq m Use Class E/F2 Space to the west of Stevenage is currently being determined by the Local Planning Authority. This emerging proposal is in broad accordance with Policy SP4 D criterion ii of the SBLP. However as this application is yet to be determined and is not a commitment, Policy SP4 D criterion ii should remain.
- 8.23 A planning application is yet to be submitted for the proposed urban extension to the south east of Stevenage which Policy SP4 criterion iv identifies would contain a foodstore of no more than 500m² with a convenience store. Policy SP4 D criterion iv should therefore remain.
- 8.24 Criterion D ii and criterion D iv will collectively continue to allocate 1,000 sq m net convenience goods, meaning the residual convenience goods capacity over the remainder of the plan period would be 1,078 sq m net. This is a relatively modest figure and it is recommended that SBC amend SP4 criterion Di to allow this residual

capacity to be accommodated for extensions to existing centres in the retail hierarchy, then other stores in accordance with the sequential test.

- 8.25 Accordingly, it is no longer necessary, and the convenience goods capacity does not exist, for the 4,600 sq m net convenience store allocation at Graveley Road in accordance with Policy SP4 D criterion V, policy TC11 and policy TC12. As such, if this allocation were to be delivered there is a significant likelihood that the proposal would have a significant and adverse impact on one or more of the considerations in paragraph 94 of the NPPF. It is therefore recommended that this allocation is removed as part of the SBLPR.

Comparison Goods Capacity

- 8.26 Taking account of the identified quantitative need figures from the 2014 Retail Study from 2014-2031, and accounting for changes in the supply of the floorspace in the intervening period and existing commitments, for the rest of the plan period (2024 -2031), a theoretical capacity is identified of 16,167 sq m net of comparison goods floorspace.
- 8.27 This level of capacity is identified, primarily due to the fact that 20,602 sq m net of comparison goods floorspace has been lost or is committed to be lost since 2014.
- 8.28 Indeed, it is notable that a significant proportion of the comparison goods floorspace which has been lost since 2014 is from Stevenage Town Centre as a result of residential-led mixed use redevelopment proposals. These regeneration projects and the loss of floorspace has resulted in a number of major multiples leaving the Town Centre and an increase in vacancy rates.
- 8.29 This trend has also correlates with a parallel significant increase in the supply of comparison goods retail floorspace at out-of-centre retail parks, most noticeably at Roaring Meg North.
- 8.30 This is a clear risk to the Town Centre, and the potential impact of this out of centre development and the migration of comparison goods multiple retailers, on the Town Centre regeneration strategy should be recognised in planning policy.
- 8.31 Paragraph 90(b) of the NPPF is clear on centre first principles, and that LPA's should allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed. It is clear that there is sufficient physical capacity within Stevenage Town Centre to accommodate the theoretical capacity for 16,167 sq m net of comparison goods floorspace. It is also likely that future redevelopment proposals as part of the Major Opportunity Areas will include substantial components of comparison goods floorspace.
- 8.32 It is therefore not necessary to allocate edge of centre or out of centre sites to seek to accommodate the current theoretical comparison goods capacity. Moreover, to do so, would provide a real risk of exacerbating the migration of retailers from the Town Centre and would likely have a significant adverse impact on the vitality and

vitality and viability of centres and existing, committed and planned public and private investment.

- 8.33 To allow permissive Development Plan policy to enable and facilitate comparison goods schemes to be delivered in the Town Centre, as part of the wider mixed use regeneration strategy, it is recommended that Policy SP4 criterion b is amended to 'allow' for in the order of 20,000 sq m of additional comparison goods floorspace in the Town Centre, from the current baseline. It is also recommended that Policy TC12 is amended to echo this allowable comparison goods floorspace in the Town Centre Shopping Area.
- 8.34 The amendment to these policies would ensure that any future development proposals to replace the losses of comparison goods floorspace which have currently been lost from Town Centre are not in conflict with SP4(d) and TC12. These suggested amendments to the policies would not alter the sub-regional/regional role and function of Stevenage Town Centre as a comparison goods shopping destination, but the amendments to the policies would instead just provide a permissive policy context which would allow the replacement of the comparison goods floorspace which has been lost.

The implementation of the Impact Test and the Sequential Test

- 8.35 The redevelopment of Stevenage Town Centre is ongoing, but Applied Planning recommend that the further loss of any retail floorspace from the Town Centre is considered carefully as a material consideration in any future planning applications, as this trend is a cause for concern.
- 8.36 Policy TC13 of the SBLP sets a locally set impact assessment threshold requiring that any proposals in excess of 300m² for main town centre uses outside the Town Centre are subject to an impact assessment. This locally set retail impact assessment is in accordance with our recommendations from the 2014 Retail Study.
- 8.37 We consider that this retail impact threshold remains robust, and the local planning authority should request an impact assessment for any retail or leisure development which is not in a defined centre above 300 sq m gross. This threshold remains reflective of the health of centres and the potential for developments to have a significant adverse impact on the considerations in paragraph 94 of the NPPF and remain justified.
- 8.38 However, we do recommend that Policy TC13 is amended as follows:
- The title of the policy should refer to Town Centre Uses Impact Assessments and not 'retail' impact assessments, so the title of the policy is consistent with the substance of the text.

- It should be clarified in the policy that the threshold applies to proposals in excess of 300 sq m gross of floorspace as per the recommendation of the 2014 Retail Study.
- The policy should clarify that this policy also applies to planning applications which seek to vary the type of goods which can be sold from existing premises. This is important given the effects that these types of Section 73 applications outside of defined centres are having on the vitality and viability of the Town Centre.
- Criteria i and ii should be updated to reflect the updated tests in paragraph 94b of the NPPF (or any subsequent version of the NPPF).

8.39 Concurrently, SBC may want to consider amending the wording of criterion e of Policy SP4. Applied Planning do not consider it is appropriate for this policy to just state that applications to relax or refuse conditions will be refused. The NPPF requires that such applications should be refused if they fail to satisfy the sequential test or are likely to have significant adverse impact on one or more of the considerations in paragraph 94 of the NPPF.

Centres Hierarchy

8.40 Paragraph 90(a) of the NPPF states that planning policies should define a network and hierarchy of centres. Paragraph 004 in in Town Centres and Retail Section of Planning Practice Guidance also states that town centre strategies should establish the realistic role, function and hierarchy of town centres over the plan period.

8.41 Within Stevenage, there are five tiers within the Borough's Retail Hierarchy as defined in Policy SP4(a) of the SBLP. Policy SP4 states that the SBLP will maintain this retail hierarchy.

8.42 The existing retail hierarchy is set out below.

Tier 1: Stevenage Town Centre.

Tier 2: High Street Major Centre (Stevenage Old Town).

Tier 3: Poplars District Centre.

Tier 4: Seven Local Centres.

- Bedwell Crescent
- The Glebe
- The Hyde
- Marymead

- Oaks Cross
- The Oval
- Roebuck

Tier 5: Seven Neighbourhood Centres

- Canterbury Way
- Chells Manor
- Filey Close
- Hydean Way
- Mobbsbury Way
- Popple Way
- Rockingham Way

8.43 We have the following observations on the retail hierarchy.

- Stevenage is the largest centre in the Development Plan area and has an important role in meeting a retail and service needs. It should remain as the top-tier centre.
- The number and diversity of units in High Street Major Centre (Stevenage Old Town), and the presence of a robust retail service and leisure sector means the Centre provides a range of services and facilities for local residents and is a destination in its own right. The Centre has a role and function which justifies it being a 'tier 2' centre, sitting below Stevenage Town Centre and above the other centres. We recommend no changes to this designation.
- Poplars should also continue to be differentiated as a separate 'tier 3' centre 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.
- Filey Close Centre is designated as Neighbourhood Centre in the SBLP. However, since the adoption of the SBLP, the Centre has undergone redevelopment and now has a better representation of retail facilities including Nisa Supermarket which provides a reasonable top-up shopping offer. Whilst there are only eight retail/service units in the Centre, the Centre contains a strong range of community uses. Having regard to the wider range of community uses and the improved retail offer within the

Centre, we recommend that Filey Close is redesignated as a Local Centre within the SBLPR.

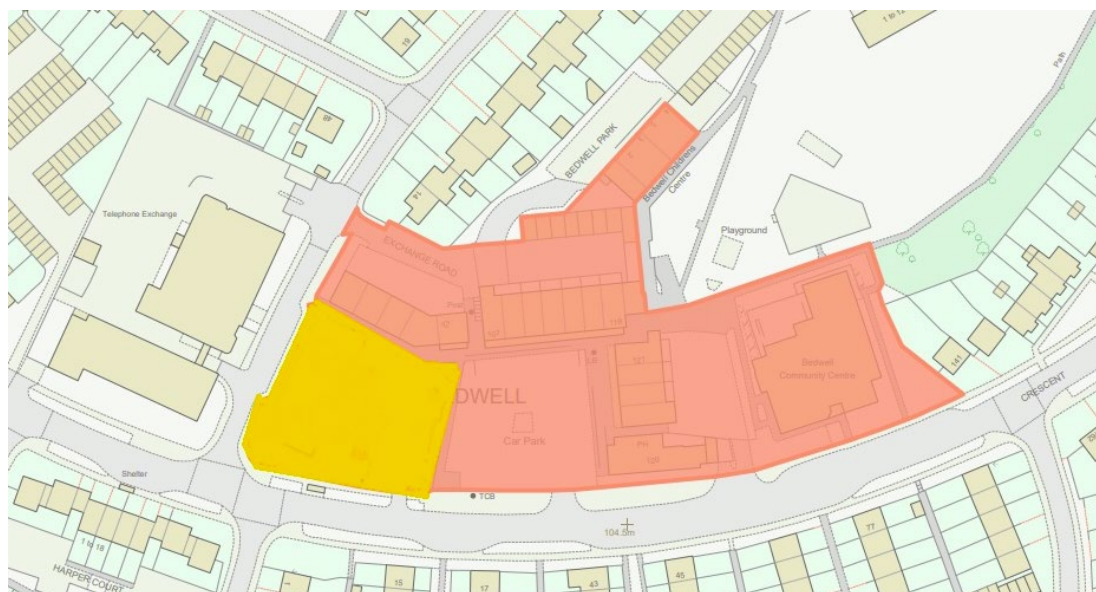
- We consider, that all over Local and Neighbourhood Centres continue to fulfil their role and function and it remains appropriate to maintain the two tiers of the centres to differ between the Local Centres which provide a wider range of retail provision, community and service facilities, and thus serve a wider catchment than the Neighbourhood Centres.

Defined Centre Boundaries

- 8.44 We have reviewed the defined Town Centre Boundary and Town Centre Shopping Area for Stevenage Town Centre and do not recommend any changes. However, it is recommended that these boundaries are revisited as part of the full plan review as it may be logical to amend the boundaries once a number of developments which are currently under construction and are committed have been delivered.
- 8.45 However, it is recommended that the first paragraph of Policy TC8 is updated to advise that Class E Uses will be permitted at ground floor level, as the Policy is currently referring to superseded Use Classes from the Town and Country Planning (Use Classes) Order 1987.
- 8.46 We have also reviewed the High Street Shopping Area for Stevenage Old Town and we do not recommend any changes. However, again it is recommended that Policy TC9 is updated to advise that Class E Uses will be permitted.
- 8.47 In regard to the Local and Neighbourhood Centres we recommend the following amendments to the defined boundaries of the centres as defined on the SBLP Proposals Map.

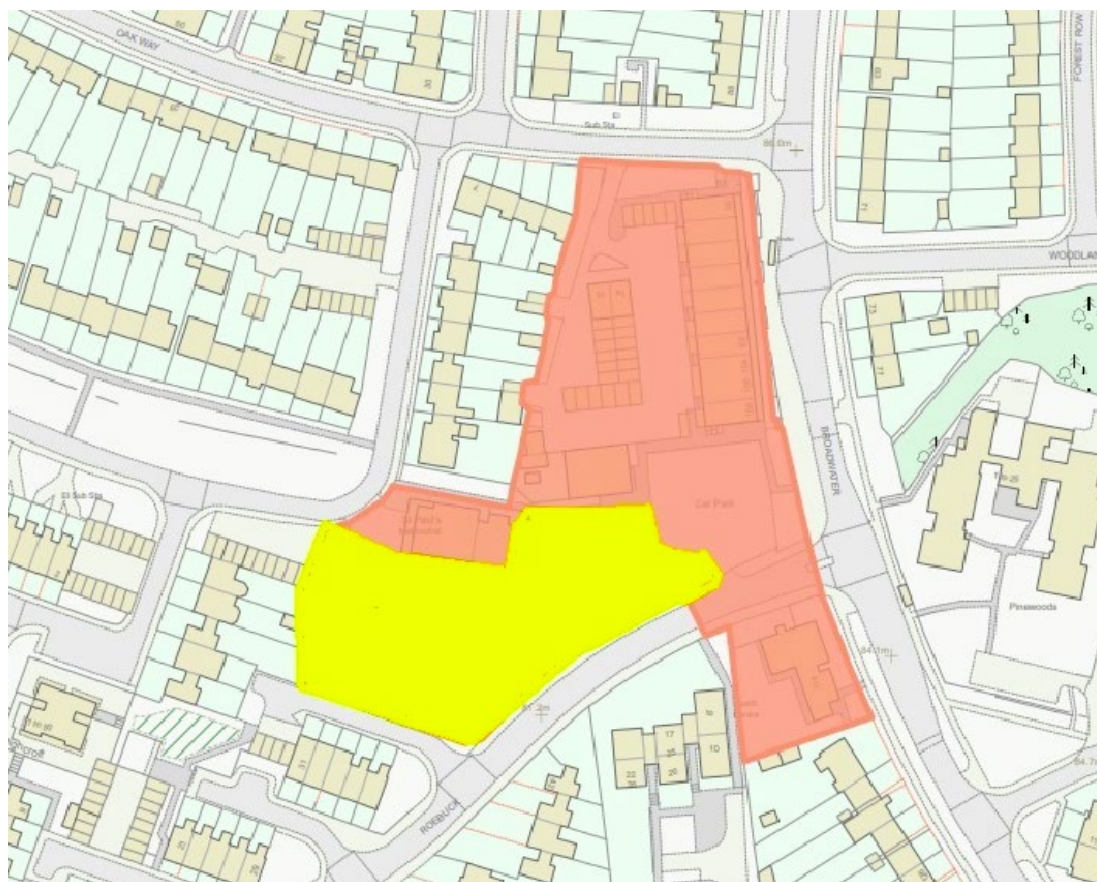
Bedwell Crescent Local Centre

- 8.48 It is recommended that the defined boundary of Bedwell Crescent is amended to exclude the area shaded yellow below. The area shaded yellow comprises a 3-storey residential building and its associated car park which is not a mixed use building and does not physically form part of the Centre with separate vehicular and pedestrian accesses.



Roebuck Local Centre

- 8.49 It is recommended that the defined boundary of Roebuck Local Centre is amended to exclude the area shaded yellow below. This is a residential building and open space with tree planting. The residential use and open space is detached from the commercial element of the Centre, and is residential in character, and does not physically form part of centre with separate vehicular and pedestrian accesses.
- 8.50 During the Plan Review process it is also recommended that the Local Planning Authority keep under review any redevelopment proposals that may come forward at the former St Paul’s Methodist Church (to the north of area shaded yellow) which is currently vacant and for sale. If for instance, this building is converted to residential uses during the Plan Review process, it may also be appropriate to exclude this building from the defined centre boundary.



Chells Manor

- 8.51 It is recommended that the defined boundary of Chells Manor Neighbourhood Centre is extended to include the area edged yellow below, to include the vehiclr access to the Centre as well the car parks, including the car park for the public house. These areas should be included as they are integral to the centre.
- 8.52 There is also an area of landscaping to the south west of the public house which is used as a beer garden. It is unclear whether this use of lawful, but it is also suggested that the Local Planning Authority consider extending the boundary of the Centre to include this land which is being used as beer garden which is linked to the associated uses within the Centre. Given the uncertainty about the lawfulness of the use, this area is not edged yellow in the plan below



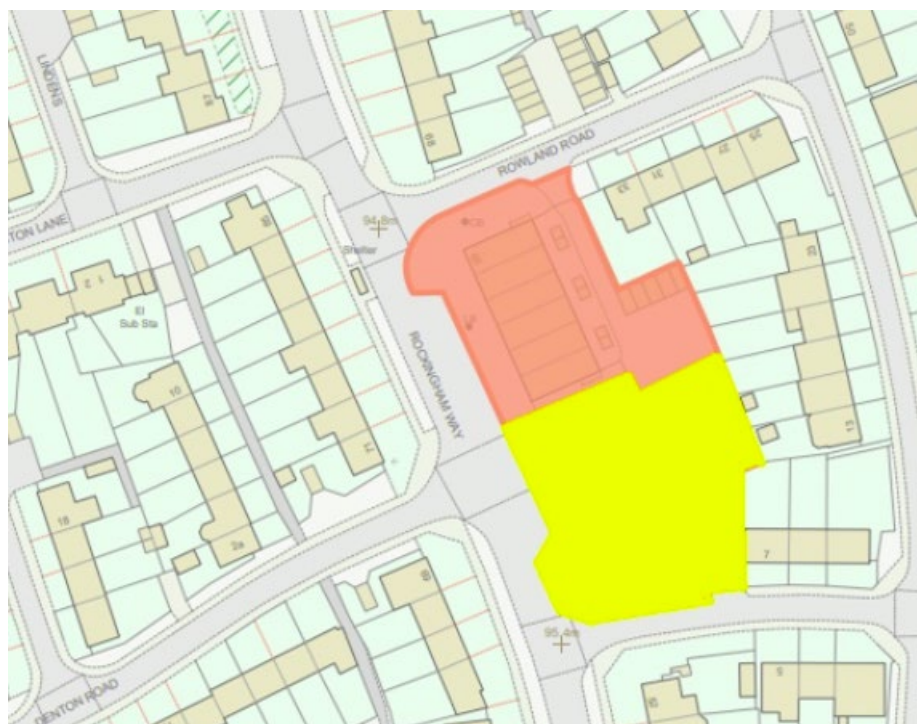
Filey Close

- 8.53 It is recommended that the defined boundary of Filey Close Neighbourhood Centre is amended to exclude the area shaded yellow below. This is a residential building known as Somerton Court which is physically detached from the wider centre and is a separate residential use.



Rockingham Way Neighbourhood Centre

8.54 It is recommended that the defined boundary of Rockingham Way Neighbourhood Centre is amended to exclude the area shaded yellow. This area of land is occupied by a three-storey residential building (Twin Foxes House) and its associated car park and access, and the building is physically detached from the town centre uses.



The Oval

- 8.55 The existing centre boundary of the Oval is defined in the SBLP. The boundary includes some uses which would not normally be including in a defined centre boundary including a Locally Equipped Area of Play (LEAP) to the north and a sub-station to the south. The Local Planning Authority may wish to review this boundary as part of SBLP Review, to exclude the LEAP, but it is noted that this area is subject to the redevelopment proposals. It is recommended that the boundary of the Centre is kept under review as part of the Plan Review process, taking account of the progress of planning application 23/00954/FPM in the intervening period.

Primary Shopping Frontages

- 8.56 Policy TC8 of the SBLP defines Primary and Secondary Frontages within Stevenage Town Centre. The purpose of this policy is to give primacy to retail uses within these areas.
- 8.57 The NPPF 2023 has deleted the requirement for local authorities to define primary and secondary retail frontages in designated centres which was previously a requirement of bullet point 3 of paragraph 23 of the NPPF 2012. It is also considered that these Primary and Secondary Frontage Policies are inconsistent with the permitted development rights which existing by virtue of Use Class E which combines shops, restaurants, offices, gyms and nurseries (amongst others) and these uses no longer require planning permission to switch uses.
- 8.58 However, paragraph 002 of the Town Centres and Retail Section of Planning Practice Guidance states that LPA's may, where appropriate, also wish to define

primary and secondary retail frontages where their use can be justified in supporting the vitality and viability of particular centres.

- 8.59 In the case of Stevenage Town Centre, we consider it is no longer appropriate to maintain Primary and Secondary Frontage Policies. The ethos of the Town Centre regeneration strategy is to encourage a mix of uses into the Centre, to in part facilitate a evening economy. The Primary and Secondary Shopping Frontage are acting as a planning policy barrier for the Centre to respond to structural changes in shopping and leisure patterns and allowing the Centre to adapt and change. These policies in turn have the potential negatively impact on the vitality and viability of the Town Centre. It is therefore recommended that the Primary and Secondary Frontage policies for Stevenage Town Centre are deleted in the SBLPR.