Oaklands College & Land south of Sandpit Lane, St Albans

Retail Capacity Statement

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Project: 333101694

OAKLANDS BLOSSON & OAKLANDS COLLEGE, ST ALBANS
RETAIL CAPACITY STATEMENT

Introduction

1. This Statement has been prepared on behalf of Taylor Wimpey and Oaklands College in order to inform development proposals for Oaklands Blossom, which will provide a mixed-use scheme as described below.

   "*A Hybrid planning application for a severable phased development comprising:*

   - *Full detailed planning application for the construction of new homes (use class C3); new local centre and community facility (use classes E(a to f) and F); a children's home (use class C2); demolition and renovation of existing college buildings; construction of new college buildings (use class F1.); the creation of Active Travel Routes including footpaths for walking, cycling and equestrian activities; removal and planting of trees; along with the laying out of green infrastructure (including publicly accessible open space) and habitat creation; drainage infrastructure, earthworks, new means of access and alterations to existing access points.*
   - *Outline planning application (access only, all other matters reserved) for the construction new homes (use class C3); new extra care home dwellings (use class C2); land for the construction of a new primary school (use class F.1); demolition and renovation of existing college buildings; construction of new college buildings (use class F1.); the construction of new sports facilities and pitches; the creation of Active Travel Routes including footpaths for walking, cycling and equestrian activities; removal and planting of trees; new energy centre; new recycling facilities; new car parking facilities; along with the laying out of green infrastructure and habitat creation; drainage infrastructure, earthworks, pedestrian and cycle routes, alterations to existing access points.*
   - *The phasing of the development is indicative allowing different phases to commence at different times and independently (severable) from each other. The outline phases will are the subject of parameter plans and design codes*".

2. Drawing on the South West Hertfordshire Retail and Leisure Study (2018), this Statement examines the capacity or 'need' for additional retail and leisure floorspace aimed at serving the new community at Oaklands College in order to ensure that the proposals are appropriately scaled.

Background Context

3. The emerging Local Plan (Regulation 19 Submission) allocates 'Broad Locations' for development growth including land at 'East St Albans'. This allocation is intended to provide a minimum of 472 dwellings and between 70 and 80 extra care homes as part of a mixed- use scheme that will also provide new primary schools and local centre. It also identifies Oaklands College within a College Development Zone and a Sports and Community Zone, which expects new improvements, green infrastructure, transport infrastructure and other community infrastructure to be delivered in this location.

4. Strategic Policy SP6 – 'City Town and Village Centres and Retail' also seeks to maintain and enhance a hierarchy of retail centres based on the town centre first principle and develop new local centres within the Broad Locations to serve the day-to-day needs of the relevant wider resident catchment population.

5. The South West Hertfordshire Retail and Leisure Study 2018 (SWHRLS) identified modest capacity for additional convenience and comparison retail floorspace over the Local Plan period. (The Study identifies need of between 2,200sq m and 4,800 sq m of convenience goods in St Albans by 2031 and that this capacity should be used to support day-to-day requirements). Paragraph 9.86 of the SWHRLS states:

   "…We consider that there is therefore no pressing qualitative need to allocate specific large sites for convenience retail development in St Albans over the next 10 years, and that the capacity identified should be envisaged to support the day-to-day requirements of smaller convenience goods retailers, together perhaps, with providing small-scale Local Centre type floorspace to accompany any major planned urban extensions…".

6. This provides helpful context to support the principle of a local centre within the East St Albans site. However, given the passage of time since the SWHRLS was produced, it is considered prudent to further review the expected locally derived 'need' for additional retail and leisure floorspace in order to inform the proposals and ensure it is appropriately scaled and commercially attractive.

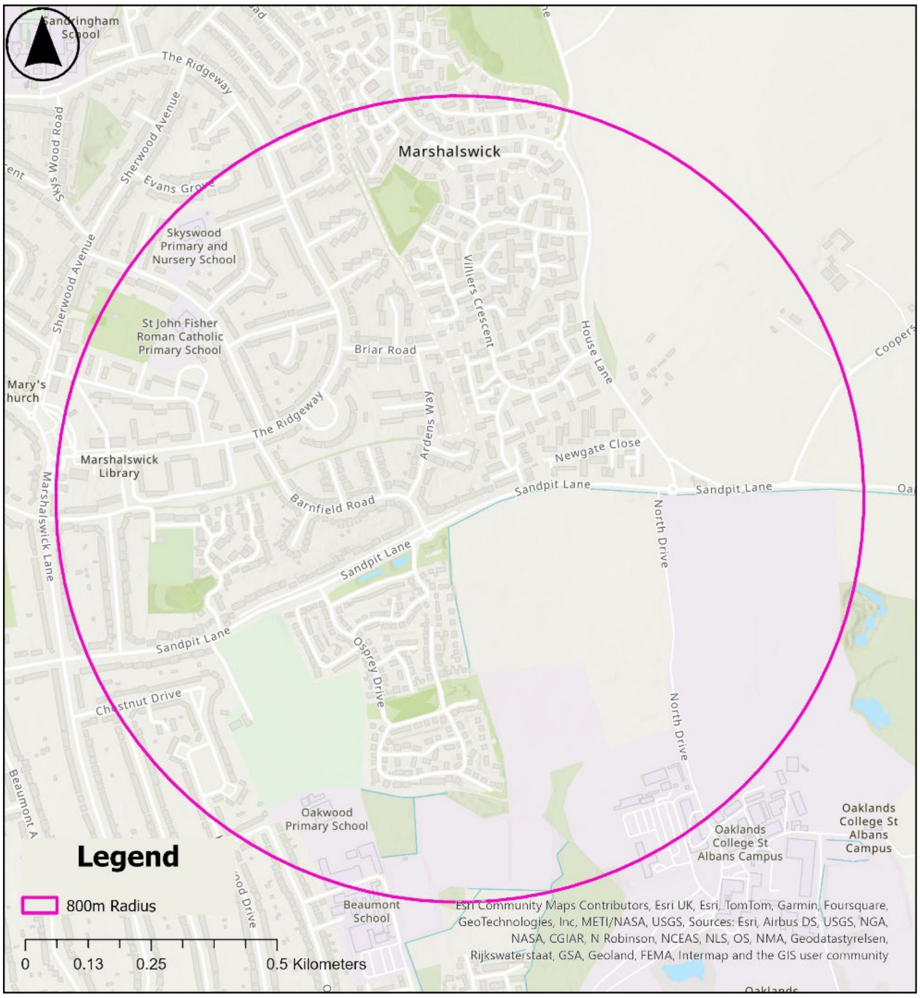
Retail Capacity Update – Convenience Goods

7. The SWHRLS was published in September 2018 and whilst now somewhat dated, the underpinning household survey continues to provide the most up-to-date evidence of shopping patterns within the Borough.

8. Based on population and expenditure data and input assumptions relating to expenditure growth, Special Forms of Trading or SFT (i.e. Internet and non-store spending), and sales efficiency growth at that time, the 2018 Study (as noted above) identified capacity for up to 4,800 sq m of convenience goods by 2031 and 4,300 sq m of comparison goods once commitments had been factored in.

9. Not all of that capacity should be directed to Oaklands Blossom and Oaklands College, but it confirms there is an overall capacity to support new floorspace on the Site and provided it is commensurate with the scale of the development, it should not undermine the existing retail hierarchy of centres.

10. Looking more closely at the expenditure capacity of the immediate area of the Site, Stantec have undertaken an assessment using up to date population and expenditure data for the area within 800m of the site (as an accepted standard of distance people are prepared to walk to a shop/facility). The area is shown below.



11. Within the 800m catchment area, the existing local centre at St Brelades Place (Jersey Farm) and the neighbourhood/district centre of The Quadrant (Marshalswick), lie on the extremities and are likely to be the main draw for existing top-up convenience shopping. Central Drive Local Centre is outside of the catchment area to the west.

12. Included in **Appendix 1** are a number of Tables that consider the convenience goods expenditure capacity within the catchment and can be summarised as follows:

- **Table A1** provides up-to-date population data for the catchment area derived from Experian at 2025 and projected forwards at 5-year intervals to 2030, 2035 and 2040.
- **Table A2** sets out up-to-date expenditure per capita for convenience goods for each zone at 2025, 2030, 2035 and 2040. The expenditure data is drawn from Experian data at 2025 (in 2022 prices), which has been projected forwards using growth forecasts within Experian Retail Planner Briefing Note 21 (ERPBN 22) (March 2025).
- **Table A3** presents the total available convenience goods expenditure per zone at 2025, 2030, 2035 and 2040. This shows that at 2025, there is an estimated £16.29m of total convenience goods expenditure generated across the 800m radius around the proposed scheme, which remains consistent, albeit a slight drop, to £16.15m by 2040. The proposed development seeks to provide a top-up shopping facility rather than compete with bulk shopping destinations. Accordingly, **Table A3** also considers top-up shopping expenditure capacity as a percentage of total convenience goods

spending. It is estimated that there is c£5.7m of top-shopping expenditure derived from the catchment.

- **Table A4** considers existing top-up convenience goods turnover within the catchment area and estimates c£3.3m of turnover of existing surrounding stores is derived from the catchment.
- **Table A5** considers the surplus top-up convenience goods expenditure capacity within the catchment that can support new floorspace. It is estimated that the existing population could support c19 sq m of new net sales floorspace within catchment in 2030.
- The proposed development will also deliver new population within the catchment to further support new convenience goods floorspace. **Table A6** considers the additional expenditure capacity to support new floorspace that is derived from the proposals (minimum of 522 homes). This would deliver an additional £3.65m of convenience expenditure of which c£1.28m would be available for top-up shopping, providing support for an additional 106 sq m net sales of convenience goods floorspace by 2035.
- **Table A7** summarises the total available convenience expenditure available to support new floorspace and calculates this could support up to c300 sq m net of additional convenience floorspace or c400 sq m GIA by 2035.
- The results are summarised in Table 1 below.

Table 1: Convenience Goods Floorspace Capacity Forecasts (sqm net)

	2025	2030	2035	2040
Top-Up Expenditure in Catchment (£m)	£5.70	£5.63	£5.63	£5.65
New Top-Up Expenditure resulting from the Proposals (£m)	£0	£0.30	£1.28	£1.28
Existing Stores turnover derived from catchment (£m)	£3.31	£3.31	£3.31	£3.31
Residual Expenditure (£m)	£2.39	£2.62	£3.60	£3.62
Floorspace (sqm net sales)	**199**	**218**	**300**	**302**
Floorspace (sqm gross)	**265**	**291**	**400**	**402**

Source: Experian 2025 (2022 Prices)

13. Accordingly, there is sufficient capacity to support a small local convenience store within the Proposed Development to accommodate surplus expenditure.

Retail Capacity Update – Comparison Goods

14. The SWHRLS (2018) identified capacity for up to 4,300 sq m of additional comparison goods retailing once commitments had been factored in.

15. The size of the residential population generated by the Proposed Development at Oaklands Blossom will also generate comparison goods capacity. This can be estimated by similarly using recent Experian data.

16. Table 2 below (and **Tables A8-A9** in **Appendix 1**) shows the estimated comparison goods expenditure generated by the development up to 2040.

Table 2: Estimated Residential Population and Comparison Goods Spend

Year	No. Dwellings (Cumulative)	Estimated Population	Comparison Expendiure per head	Comparison Expenditure
2025	0	0	4,326	0
2030	122	309	4,885	£1.51m
2035	522	1,321	5,597	£7.39m
2040	522	1,321	6,376	£8.42m

Source: Experian 2025 (2022 Prices)

17. It can be seen that a significant amount of Comparison Goods expenditure will be generated by the Proposed Development (c£7.4m by 2035 when Oaklands Blossom would be expected to be fully built out).

18. Comparison shopping is by its nature, less localised and it is therefore important to ensure that any such provision at the Proposed Development is tailored to meet local needs so that other defined centres continue to be the focus for higher order comparison goods shopping (i.e. the development should provide a localised comparison shopping offer of a scale which will not directly compete with existing centres such as St Albans town centre, The Quadrant or affect the vitality of Jersey Farm centre).

19. Smaller centres should therefore have much lower levels of retention of comparison goods expenditure reflecting the more limited role they perform in serving non-food retail needs. However, if only 10% of the comparison goods expenditure generated by the Proposed Development was retained within the development, it could still support c250 sq m of GIA floorspace (based on an average sales density of £4,000 per sqm net) as shown in **Table A9** and summarised in Table 3 below.

Table 3: Comparison Goods Retail Floorspace Capacity Forecast

Year	Comparison Goods Expenditure	10% Comparison Goods Expenditure Retention	Floorspace Supported (sqm gross)
2030	£1.51m	£0.15m	50
2035	£7.39m	£0.74m	246
2040	£8.42m	£0.84m	281

Source: Experian 2025 (2022 Prices)

Leisure, including 'Beauty' and 'Food and Beverage' Expenditure

20. In addition to retail floorspace, it is also important to recognise the potential for leisure floorspace to complement the local centre function. A high level assessment of leisure expenditure is provided in Tables **A10-A11** in **Appendix 1** and summarised below.

21. Table 4 sets out an average leisure expenditure per head for total leisure activities and broken down into restaurants/cafes, activities and personal grooming (hair salons etc) as taken from the Experian data source. A large proportion of leisure expenditure is spent on food and beverage (F&B), with less expenditure on activities and personal grooming which is likely to be more local expenditure. Table 5 then projects that forward as the Oaklands Blossom is completed.

Table 4: Annual Leisure Expenditure Per Person

Leisure Category	Annual Expenditure per Person (£)			
	2025	2030	2035	2040
Total Leisure[1]	**4,993**	**5,129**	**5,306**	**5,494**
Restaurants, cafes etc	2,338	2,402	2,484	2,573
Recreational Activities	235	241	250	258
Personal Grooming	117	120	124	129

Source: Experian 2025 (2022 Prices)

Table 5: Leisure Expenditure Generated by New Residents

Year	Expenditure (£m)			
	Total Leisure	Restaurants, cafes etc	Recreational Activities	Personal Grooming
2025	**£0**	£0	£0	£0
2030	**£1.58m**	£0.74m	£0.07m	£0.04m
2035	**£7.01m**	£3.28m	£0.33m	£0.16m
2040	**£7.26m**	£3.40m	£0.34m	£0.17m

Source: Experian 2025 (2022 Prices)

22. Similar to retail provision, it is important that the leisure provision within new centres is of a scale which is proportionate to its role in the hierarchy. If the proposed centres are ‘over-sized’ relative to ‘need’ there is potential for it to give rise to a negative impact on other defined centres within the wider area, including the existing The Quadrant and Jersey Farm.

23. On basis that 10% of leisure expenditure is retained locally, this would equate to around £0.7m of turnover within the new Local Centre.

24. There is no established methodology for translating this leisure expenditure into floorspace, but if we were to assume that a typical food and beverage (F&B) operator were to generate an average of £10,000 - £15,000 per week, this would equate to an annual turnover of c.£0.5m - £0.8m per annum. At this level of turnover, the expenditure generated by the new resident population could theoretically support 1 F&B unit. Alternatively, expenditure of £0.17m on personal grooming is also likely to support 1 x hair salon or similar. Accordingly, it is expected that the leisure expenditure will support 1 additional unit of c100 sq m.

Conclusion

25. Drawing the analysis together, it is considered there is scope for a proposed local centre to support around 750 sq m GIA of Class E (retail and leisure) floorspace on the Oaklands Blossom site.

[1] Includes accommodation services; cultural services; education; games of chance; personal grooming; insurance; recreational activities; restaurants, cafes etc; social protection and other services.

26. This could be split to include a local convenience store of c330 sq m and a small newsagents (in total to provide c400 sq m gross of convenience goods floorspace) and/or c350 sq m of smaller local stores/facilities to cater for hair salons or beauty uses; a café/restaurant; dry cleaning or other specific comparison retailing.

27. The proposed local centre at Oaklands Blossom should not aim to attract an unrealistic rate of retention for comparison goods expenditure in order to limit competition with other centres such as The Quadrant, which should continue to be a focus for this type of shopping within the area to maintain its vitality and viability.

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Appendix 1 - Retail Tables

Retail Capacity Assessment: Convenience Goods

Table A1: Estimated Survey Area Population

Population Projection 2025	5,840
Population Projection 2030	5,802
Population Projection 2035	5,824
Population Projection 2040	5,843

Notes

1. Population derived from Experian Area Profile Report (2025) specific to 800m radius catchment area

Table A2: Per Capita Convenience Goods Expenditure

2025	£2,789
2030	£2,772
2035	£2,764
2040	£2,764

Notes

1. Per Capita expenditure at 2025 derived from Experian Area Profile Report (2025) specific to 800m radius catchment area
2. Expenditure growth in line with Experian Retail Planner Briefing Note 22 (March 2025)
3. Expenditure data presented in 2022 prices
4. Figures may not cast due to rounding

Table A3: Estimated Convenience Goods Expenditure (£M)

	Total Estimated Expenditure	Top-Up Shopping Expenditure
2025	£16,288,750	£5,701,063
2030	£16,085,892	£5,630,062
2035	£16,098,494	£5,634,473
2040	£16,151,013	£5,652,855

Notes

1. Derived from Tables A1 and A2.

2. Expenditure data presented in 2022 prices

3. Estimated Top-Up Expenditure based on 35% of Total Estimated Expenditure

Table A4: Top-Up Convenience Goods Turnover derived from Catchment

Location	Size (net sales area) (Sq m)	Sales Density (£/sq m)	Estimated Turnover	% derived from catchment	Turnover from Catchment
Jersey Farm (St Bedales)					
Tesco Express	255	13,000	£3,315,000	35%	£1,160,250
The Quadrant (Marshalswick)					
M&S Simply Food	255	11,000	£2,805,000	25%	£701,250
Sainsbury's PFS	200	13,000	£2,600,000	20%	£520,000
Budgens	200	7,000	£1,400,000	25%	£350,000
Cook (Frozen Meals)	65	5,500	£357,500	15%	£53,625
Simmons Bakery	65	5,500	£357,500	25%	£89,375
Morrisons Daily	150	10,000	£1,500,000	25%	£375,000
Greggs Bakery	50	5,000	£250,000	25%	£62,500
Total			£12,585,000		£3,312,000

Notes

1. Sales Density based on Global Data Assessments

2. % derived assumptions based on spatial assessment of catchment

Table A5: Existing Available Top Up Expenditure to support new floorspace.

	Available Top Up Expenditure	Turnover derived from Catchment	Surplus expenditure	Floorspace (net sales) sq m
2025	£5,701,063	£3,312,000	£2,389,063	199
2030	£5,630,062	£3,312,000	£2,318,062	193
2035	£5,634,473	£3,312,000	£2,322,473	194
2040	£5,652,855	£3,312,000	£2,340,855	195

Notes

1. Sales Density of £12,000 per sq m used to calculate new floorspace, based on Global Data Assessments for Tesco/Sainsbury/Co-op type convenience store

Table A6: Additional Expenditure derived from Proposed Development to support new floorspace

	Homes Built	Population	Expenditure per head	Total Spend	Top-Up Shopping Spend	Floorspace Capacity (sq m)
2025	0	0	2,789			0
2030	122	309	2,772	£855,752	£299,513	25
2035	522	1,321	2,764	£3,650,521	£1,277,683	106
2040	522	1,321	2,764	£3,650,521	£1,277,683	106

Notes

1. Population based on household size of 2.53 people in new developments

2. Expenditure data presented in 2022 prices

3. Estimated Top-Up Expenditure based on 35% of Total Estimated Expenditure

4. Sales Density of £12,000 per sq m used to calculate new floorspace, based on Global Data Assessments for Tesco/Sainsbury/Co-op type convenience store

Table A7: Total Additional Convenience Expenditure to support new floorspace

	Surplus Top Up Expenditure	Additional Top-Up Expenditure from Development	Total Top-Up Expenditure	Net Sales Floorspace Capacity (sq m)	GIA Florspace Capacity (sq m)
2025	£2,389,063		£2,389,063	199	265
2030	£2,318,062	£299,513	£2,617,575	218	291
2035	£2,322,473	£1,277,683	£3,600,155	300	400
2040	£2,340,855	£1,277,683	£3,618,537	302	402

Notes

1. Surplus Top-Up Expenditure from Table A5
2. Expenditure data presented in 2022 prices
3. Additional Top-Up Expenditure from Table A6
4. Sales Density of £12,000 per sq m used to calculate new floorspace, based on Global Data Assessments for Tesco/Sainsbury/Co-op type convenience store
5. Net Sales area 75% of GIA

Retail Capacity Assessment: Comparison Goods

Table A8: Additional Comparison Goods Expenditure derived from Proposed Development

	Homes Built	Population	Expenditure per head	Total Spend
2025	0	0	4,326	0.00
2030	122	309	4,885	£1,507,756
2035	522	1,321	5,597	£7,391,999
2040	522	1,321	6,376	£8,420,635

Notes

1. Population based on household size of 2.53 people in new developments
2. Expenditure data presented in 2022 prices
3. Per Capita expenditure at 2025 derived from Experian Area Profile Report (2025) specific to 800m radius catchment area
4. Expenditure growth in line with Experian Retail Planner Briefing Note 22 (March 2025)

Table A9: Total Additional Compariosn Goods Expenditure to support new floorspace

	Comparison Goods Spend derived from development	10% Retention	Net Sales Floorspace Capacity (sq m)	GIA Florspace Capacity (sq m)
2025	£0	£0	0	0
2030	£1,507,756	£150,776	38	50
2035	£7,391,999	£739,200	185	246
2040	£8,420,635	£842,063	211	281

Notes

1. Comparison Goods Spend from Table A8
2. Expenditure data presented in 2022 prices
3. Sales Density of £4,000 per sq m used to calculate new floorspace
5. Net Sales area 75% of GIA

Retail Capacity Assessment: Leisure Expenditure

Table A10: Per Capita Leisure Expenditure

	Leisure*	Food and Beverage	Personal Grooming	Recreation
2025	£4,993	£2,338	£117	£235
2030	£5,129	£2,402	£120	£241
2035	£5,306	£2,484	£124	£250
2040	£5,494	£2,573	£129	£258

Notes

1. Per Capita expenditure at 2025 derived from Experian Area Profile Report (2025) specific to 800m radius catchment area
2. Expenditure growth in line with Experian Retail Planner Briefing Note 22 (Figure 1a) (March 2025)
3. Expenditure data presented in 2022 prices
4. Figures may not cast due to rounding
5. Leisure spending includes accommodation services; cultural services; education; games of chance; personal grooming; insurance; recreational activities; restaurants, cafes etc; social protection and other services.

Table A11: Leisure Expenditure generated by development to support new floorspace

Total Leisure Spending			
Year	**Population**	**Spend/head**	**Total Spend**
2025	0	£4,993	£0
2030	309	£5,129	£1,584,847
2035	1,321	£5,306	£7,008,863
2040	1,321	£5,494	£7,257,632
F&B			
Year	**Population**	**Spend/head**	**Total Spend**
2025	0	£2,338	£0
2030	309	£2,402	£742,080
2035	1,321	£2,484	£3,281,793
2040	1,321	£2,573	£3,398,275
Hair Salons etc.			
Year	**Population**	**Spend/head**	**Total Spend**
2025	0	£117	£0
2030	309	£120	£37,131
2035	1,321	£124	£164,208
2040	1,321	£129	£170,037
Recreational Activities			
Year	**Population**	**Spend/head**	**Total Spend**
2025	0	£235	£0
2030	309	£241	£74,541
2035	1,321	£250	£329,650
2040	1,321	£258	£341,351

Notes

1. Population taken from Table A8.

2. Expenditure per head from Table A10

3. Expenditure data presented in 2022 prices