Royal Borough of Windsor and Maidenhead

Retail Health Check

May 2008

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The Royal Borough
Windsor & Maidenhead

Summary

This annual report addresses the requirement for 'comprehensive, relevant and up-to-date monitoring' of the regional centres of Windsor and Maidenhead, and the district centres of Ascot and Sunningdale, as set out in Planning Policy Statement 6 (PPS6): Planning for Town Centres.

To show the viability and vitality of the key centres a variety of monitoring indicators have been measured:

- Diversity of main town centre uses;
- Retail outlet representation and intentions to change representations;
- Shopping rents;
- Proportion of vacant street level property;
- Commercial yields;
- Pedestrian flows (footfall);
- Accessibility;
- Customer and residents views;
- Perceptions of safety and occurrence of crime;
- State of town centre environmental quality.

Windsor town centre is the first to be assessed in this report. This is an attractive shopping centre, offering a range of high-street, designer and specialist shops, and is popular with tourists. The town centre exhibits good levels of vitality and viability with low yields, strong rents, a diverse selection of retailer representations, and a high level of environmental quality.

There are a number of car parks and bus stops available around the periphery of the town centre, and the retail centre is served by two railway stations. A large percentage of the town centre is pedestrianised, though due to the historic nature of the town and the steep hills, accessibility can still be an issue for shoppers with mobility difficulties.

Recent developments in Windsor include the newly reopened Waitrose development within the King Edward Court shopping centre and the closure of the Caleys department store, (due to be converted into a new hotel and retail units).

In contrast to Windsor, Maidenhead town centre is aimed more towards the needs of the local community with the emphasis on high-street brands. Due to their distinct characters the two main regional centres within the Royal Borough are non comparable. Maidenhead retail centre is relatively healthy with a strong level of multiple representations, moderate yields, strong rents and a good retailer demand. The town centre is easily accessible by car, is served by a good rail link, and a good public bus service.

Maidenhead has had a number of improvements made to the environmental quality of the centre over recent years i.e. King Street/ Grenfell Island and the new Sainsbury's development. These have all contributed to improving the retail health of the town. However, Maidenhead town centre is still identified as an area in need of revitalisation, with the aim of making *'a good town even better'*. A Masterplan is currently being drawn up by the recently formed Partnership for the Regeneration of Maidenhead (ProM).

This report should be viewed in the context of the impact of surrounding retail areas and new developments occurring in these centres. It is interesting to note that the recent Slough Retail Assessment indicates that Slough only captures 30.1% of available spend in its area, with Windsor capturing 20.8% and Maidenhead 3.4%[1]. New retail developments are expected to impact on Windsor and Maidenhead, for example the

[1] http://www.slough.gov.uk/documents/Slough_Retail_Assessment.pdf

proposed Bracknell Eye could result in a 7% loss of trade to Windsor and a 3% loss to Maidenhead owing to proximity[2].

Both Sunningdale and Ascot are classified as district retail centres within RBWM. They provide food and other day-to-day requirements to the local catchment areas. Due to the small size of these centres not all the indicators could be measured, however information was collected on:

- Diversity of main town centre uses;
- Retailer representations (Ascot and Sunningdale) and intentions to change (Sunningdale only)
- Vacancy
- Pedestrian Flows
- Accessibility
- Local views
- Perception of safety and the occurrence of crime
- Environmental Quality

Ascot is a vibrant district retail centre catering for the resident population. The retailers in this area represent the higher end of the market, reflecting local affluence. Only the excessive level of on-street parking mars the environmental quality of the centre.

Sunningdale is an equally vibrant town centre providing an adequate range of comparison and convenience goods outlets, which fulfil the needs of the local community. Like Ascot the representation of upmarket retailers is evident. The only negative aspects of this district retail centre are its disjointed nature and the heavy traffic experienced along the London Road.

The retail health of the Borough as a whole is good, however building on this strong base there is scope for improvement.

[2] http://www.bracknell-forest.gov.uk/bracknell-town-centre-retail-study-impact-analysis.pdf

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Glossary

Town Centre	The area including the primary shopping area and other areas of predominantly business/ leisure uses within or adjacent to the primary shopping area.
Primary Shopping Area	An area where retail development is concentrated as defined on the Local Plan proposals maps.
District Centre	Groups of shops often containing at least one supermarket or superstore, and a range of non-retail services e.g. banks, restaurants, public library etc.
Diversity of Use	The number of units used for different functions e.g. shopping, services, restaurants etc.
A1 (Shops)	Shops, retail warehouses, hairdressers, dry cleaners, sandwich bars, etc.
A2 (Financial and Professional Services)	Banks, building societies, estate and employment agencies, betting offices.
A3 (Restaurants and Cafés)	Restaurants, snack bars, cafés.
A4 (Drinking Establishments)	Pubs and bars.
A5 (Hot food Takeaway)	Takeaways.
Comparison Goods	Comparison goods relate to items not obtained frequently e.g. clothing, household items, electrical equipment, etc.
Convenience Goods	Convenience goods relate to essential everyday items e.g. food, drinks, newspapers, etc.
Services	In this report Services comprise of non-retail outlets e.g. banks, hairdressing and beauty salons, cafés, restaurants, pubs.
Vacant Outlets	For this report vacant is defined as a unit that is currently empty and available for immediate let.

Introduction

National Multiple	A retail or service operator which is part of a network of nine or more outlets.
Retailer Representation	The retailers present in a given area.
Accessibility	Ease and convenience of access via different means of travel including car parking, cyclists, Shopmobility.

1 Introduction

1.1 This is the 2007/8 annual review of retail health within the Royal Borough, based on the guidance in PPS6: Planning for Town Centres. It states ‘comprehensive, relevant and up-to-date monitoring is essential to the effective planning and management of town centres’. The Submitted South East Plan (2006) defines Windsor and Maidenhead as secondary regional centres (based on a number of individual indicators covering both retail and non-retail uses). The subsequent Report of the Panel recommended that Maidenhead be altered from the latter classification to an area of focus of major retail developments. The closest primary centres to the Borough are Reading, High Wycombe, Slough and Woking. The hierarchy of centres for the Royal Borough as stated in the Local Plan is as follows:

Level 1: Sub-Regional Centre – Windsor,
Level 2: Main Town Centre – Maidenhead,
Level 3: District Centres - Ascot and Sunningdale,
Level 4: Local Centres.

1.2 In order to assess the health of the four key centres of the Royal Borough, namely Windsor, Maidenhead, Ascot and Sunningdale, a selection of indicators outlined in PPS6 have been used. These indicators aim to measure the viability and vitality of the key centres:

- Diversity of main town centre uses;
- Retail outlet representation and intentions to change representation;
- Shopping rents;
- Proportion of vacant street level property;
- Commercial yields;
- Pedestrian flows (footfall);
- Accessibility;
- Customer and residents views;
- Perception of safety and occurrence of crime[3];
- State of town centre environmental quality.

1.3 Viability is a measure of economic health and consequently the ability of a town centre to attract investment and to maintain its form. Indicators that measure viability include vacancy rates, retail outlet representations and intentions to change representation.

1.4 Vitality is the degree to which the town is busy, lively, visited and represented by a variety of activities. Indicators that measure the vitality include the diversity of town centre uses, the perception of safety and the state of environmental quality.

1.5 The health checks have been compiled using a variety of data sources, the main being biannual surveys of the town centres, which assess vacancy rates and diversity along with determining qualitative characteristics such as environmental quality. Other sources include FOCUS reports, Property Market Reports and information from Experian GOAD and G L Hearn.

[3] The perceptions of crime can only really be measured through primary surveys. The Council at the present time only has access to crime figures for the beat codes that cover the retail centres. These produce quantitative data that are not necessarily representative of public perceptions.

2 Windsor Town Centre Health Check

Form and Function

2.1 Windsor serves both local needs and those of tourists. Accordingly its role as a popular visitor destination results in a wider range of shopping floor space than would normally be expected for a town of its size. The main retail centre of Windsor comprises:

Primary Shopping Area:	King Edward Court Peascod Street (North) High Street
Secondary Shopping Area:	Peascod Street (South) St Leonards Road William Street Oxford Road
Specialist Shopping Area:	Thames Street Guildhall Island River Street East High Street Windsor Royal Station

2.2 A map of this area is available in the Proposals Map 3 of the RBWM Adopted Local Plan (1999).

2.3 The main shopping area of Windsor is 'T' shaped extending down Peascod Street and St Leonards Road, and spreading northwards along Thames Street and southwards along the High Street.

2.4 The main tourist area of the centre is focused around Windsor Castle; Guildhall Island provides a number of cobbled streets and historic. Thames Street provides a disproportionately high number of restaurants and cafés, located to serve the large number of tourists visiting the Castle.

Diversity of Use

2.5 Biannual retail surveys are carried out in Windsor recording shop use frontage, vacancy rates and changes in Use Class. Accordingly some shops with more than one entrance are counted twice to ensure diversity of use classes on each street is maintained. The most recent retail survey for Windsor was carried out in February 2008 (see table 1.1).

Table 1.1: Use Classes in Windsor Town Centre[4]

Use Class	2006	2007	2008
A1	265	260	255
A2	28	28	27
A3	60	62	63
A4	14	14	14
A5	5	5	4
Other	11	8	9
Total	**383**	**377**	**372**

(Source: RBWM Retail Surveys)

[4] There has been a loss of 11 retail units since 2006. Five units on St Leonards Road through the development of East Berkshire College; one on Peascod Street as No. 92/93 amalgamated; one unit in the Royal Station amalgamated; one through King Edward Court development and there was one occurrence of double counting.

2.6 Use classes in Windsor Retail Centre by street are available upon request from the Planning Policy Unit or can be viewed on the RBWM website. These are updated every six months during February and September.

2.7 There is a mixture of both national multiple and independent retailers in Windsor. The presence of the former is believed to enhance the appeal of town centres often increasing footfall. Yet whilst independent retailers may benefit from this increase in potential customers, multiple nationals present fierce competition. Accordingly independent traders in Windsor are predominantly to be found in secondary shopping areas, like St Leonards Road and towards the southern end of Peascod Street. Composition is determined by whether a shop sells items not purchased on a regular basis (comparison), essential everyday items (convenience), provides a service or is miscellaneous (see table 1.2 and figure 1.1). The opening of Windsor Royal Station shopping area in 1997 has contributed to the ability of Windsor to offer an up-market shopping experience that sets it apart from other retail centres.

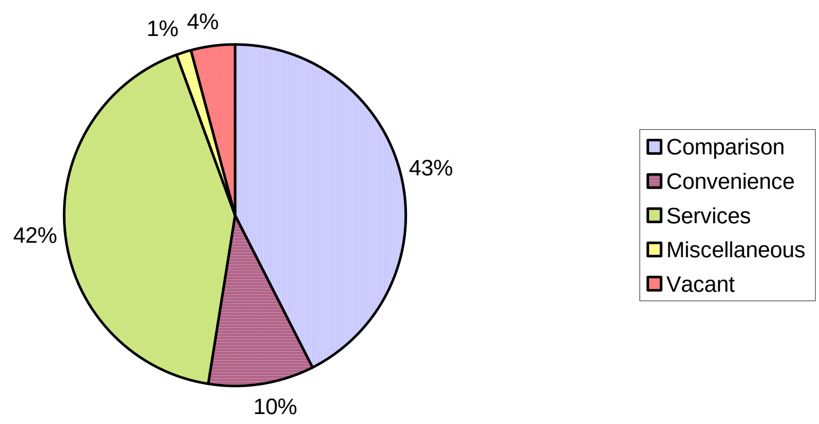
2.8 Service outlets account for greater than 40% of the retail units in Windsor town centre; this high percentage is well above the national average indicated by GOAD, which in October 2004 was 31.81%.

Table 1.2: Composition Of Uses In Windsor Town Centre, February 2008

Type of Use	Number of Units Surveyed	Percentage of Overall Units
Comparison	155	43%
Convenience	36	10%
Services	156	42%
Miscellaneous	5	1%
Vacant	16	4%
Total:	**368**	**100%**

(Source: RBWM Retail Surveys)

Figure 1.1: Composition of Uses in Windsor Town Centre, February 2008



N.B: Totals for use class and composition have a discrepancy of 4 properties, since composition assesses retail units, not frontage.

2

Windsor Town Centre Health Check

Retailer Representation and Intentions to Change Representation

2.9 There is a mixture of retail outlets within Windsor's centre, with national multiple outlets located largely along Peascod Street, upmarket specialist shops in the periphery areas such as Windsor Royal Station and independent stores scattered throughout the centre and along St Leonards Road. Perhaps not unexpectedly there are a number of shops aimed towards tourists, these are particularly evident near the Castle along Thames Street and around Guildhall Island.

2.10 National Multiple outlets represented in Windsor include Next, New Look, Woolworths, Marks and Spencer, W H Smith, Boots and Superdrug among others.

2.11 'Up-market' retailers include Crabtree and Evelyn, Hobbs Ladieswear and Nine West Shoes and Ladieswear.

2.12 John Lewis withdrew from Windsor in June 2006; however planning permission has been granted for the creation of three new retail units with a hotel above.

2.13 Despite the loss of John Lewis' representation there has generally been an increase in demand for floor space from other retailers in Windsor, demonstrated by the retailers now represented in the new King Edward Development. However demand has fluctuated over the years. Retailers currently requiring representation in Windsor town centre include Argos, Pier Homewares and Toys 'R' Us. Windsor's Town Manager understands that there is also a requirement for stores selling: Small and Large White Electrical Goods, Gardening Equipment, Video Rental and another Sports Equipment Store.

Table 1.3: Historical No. of Retailers Wishing to be Represented in Windsor Town Centre

Apr 05	88
Oct 04	77
Apr 04	75
Oct 03	85
Apr 03	83
Oct 02	94
Apr 02	86
Oct 01	74
Apr 01	87
Oct 00	86
Apr 00	72
Oct 99	61
Apr 99	59
Oct 98	57
Apr 98	64
Oct 97	58
Apr 97	46

(Source: Focus Report for Windsor)

Shopping Rents

2.14 The latest Colliers CRE 'In Town Retail Rents' research paper provides rates from 2000 to 2007 for the 609 open market Zone A shopping locations in the UK. Table 1.4 highlights the rental levels for Windsor over this period compared to neighbouring town centres.

Table 1.4: Comparative Zone A Rental Levels (£/square feet.)								
Centre	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**
Reading	200	225	225	225	230	230	230	240
Windsor	**125**	**130**	**130**	**130**	**130**	**135**	**160**	**165**
Slough	110	100	95	100	100	105	105	105
Maidenhead	95	95	100	100	100	110	110	110
Bracknell	90	80	90	90	110	110	110	115
High Wycombe	75	80	85	85	85	90	90	90

(Source: Collier CRE 'In Town Retail Rents)

2.15 Rental levels for Windsor have steadily risen since 2000, indicating a healthy centre that is increasingly in demand. Indeed according to a Colliers CRE 'In Town Retail Rents' (Autumn 2007), Windsor rents are £165 p. sq. ft. and rising year on year. Compared to neighbouring centres, Windsor is the second most expensive demonstrating it is a desirable location for retailer representation. The average rental for the South East is £105 p. sq. ft.; illustrating Windsor is a healthy retail centre performing well in the current economic climate.

Vacancy Rates

2.16 Table 1.5 shows vacancy rates collated from data collected during biannual retail surveys for Windsor.

Table 1.5: Vacancy Rates, Windsor	
Feb. 2001	8.5%
Nov. 2001	7.0%
Feb. 2002	8.3%
Nov. 2002	5.4%
Feb. 2003	4.7%
Nov. 2003	4.4%
Feb. 2004	5.7%
Nov. 2004	5.2%
Apr. 2005*	7.6%
Oct. 2005*	6.3%
Apr. 2006*	8.3%
Sep. 2006*	6.3%
Mar. 2007*	6.9%
Sep. 2007*	6.4%
Feb. 2008	4.3%

(Source RBWM Retail Surveys)

**Temporary increase in vacancy levels due to redevelopment of Waitrose and part of King Edward Court.*

2.17 In the most recent retail survey of Windsor (February 2008) there were 16 vacant properties (4.3%), the lowest in seven years. This is considerably below the national average, which at January 2006 was 8.1%.

2.18 Historically Windsor has had a relatively low vacancy rate compared to Maidenhead. The temporary closure of seven retail units in King Edward Court whilst redevelopment was taking place increased the vacancy figures; completion has rectified the situation (see table 1.5).

Commercial Yields

2.19 Commercial yields are defined as capital value in relation to the expected market retail and can be an indicator of an investor's confidence in the profitability of commercial property in a town centre. The Valuation Office considers yields a measure of retail viability, however it is an indicator that needs to be used with care. The level of yield on its own is of less value than in comparison with other yields at different points in time and in different locations. Yields measured over time can offer an indication of the direction in which a particular town centre is moving (VOA, 2007).

Windsor Town Centre Health Check

2.20 If an investor considers the prospects for rental growth of an investment to be good, they will generally be prepared to pay more for a particular property, and the initial yield is accepted in anticipation of rising incomes from rent. A high yield is generally an indication of lower investor expectations in rental growth and concern over periods in which the property may remain vacant.

2.21 The table below is taken from the July 2007 Property Market Report published by the Valuation Office showing time series data on retail property yields for Windsor from Spring 2001 to Summer 2007.

Table 1.6: Retail Property Yields

Date	04/01	10/01	04/02	10/02	04/03	01/04	07/04	01/05	07/05	01/06	07/06	01/07	07/07
Slough	6.75	7	8	8	7.25	6.5	6.5	6.5	5.5	4.5	4.5	4.5	4.5
Reading	6.5	6.5	6.5	6.5	6.5	6.5	6.5	6.5	5.5	4.5	4.5	4.5	4.25
Maidenhead	6.25	6.25	6.25	6.25	6.25	7	7	7.5	6.5	6	6	5.25	5.25
Windsor	**5.75**	**6**	**6.75**	**6.75**	**6.25**	**6.25**	**6.25**	**5.5**	**4.75**	**4.25**	**4.25**	**4.25**	**4.25**
Bracknell	7	7	7	7	7	7	7	7	6.5	6	6	6	6

(Source: The Valuation Office)

2.22 For the last five years retail property yields for Windsor have fluctuated but shown a downward trend, comparing well with neighbouring towns. This is a positive indication of the economic health of Windsor showing that retail and commercial property within the town is attractive to investors.

Footfall Counts

2.23 Most retail outlets are located along busy pedestrian routes, as it provides them with the most profitability, thus pedestrian footfall counts are an important retail health check. Pedestrian footfall data has been provided by PMRS to RBWM annually since 1996. The most recent data was collect on Friday 5th and Saturday 6th October 2007.

2.24 Table 1.7 and figure 1.2 show the average annual pedestrian counts for Windsor since 1996. Pedestrian counts have fluctuated more than in neighbouring Maidenhead. This can be accounted for by major developments and the changing fortunes of the tourist trade. For instance the re-development of Royal Windsor Station, the pedestrianisation of Peascod Street, redevelopment of King Edward Court and general slumps in the global tourism industry can explain periods of lower pedestrian numbers in Windsor. (Please contact the Planning Policy Unit for the most recent footfall counts).

2.25 Between 1998 and 1999 there was a very sharp decline in footfall levels. Although there are no major factors that could explain this difference, the weather for the survey period was cold with heavy rain that could have deterred people from shopping. England was also playing New Zealand in the Rugby World Cup, but these are merely speculations.

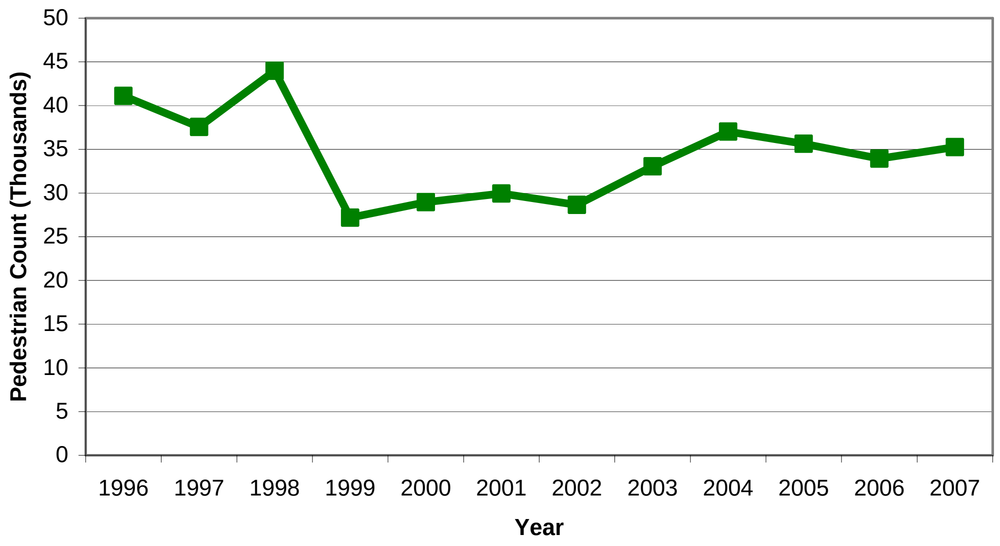
Table 1.7 Average Footfall in Windsor	
Year	**Average Count (In Thousands)**
1996	41.1
1997	37.55
1998	43.98
1999	27.17
2000	28.95
2001	29.95
2002	28.64
2003	33.06
2004	37.02
2005	35.63
2006	33.93
2007	35.24

(Source: PMRS Footfall Surveys)

Between 1996 and 1998 the highest footfall count was outside Marks and Spencer located towards the top of Peascod Street. In following years, the highest footfalls have been outside Boots in King Edward Court and outside Lloyds TSB on Thames Street. The footfall figures for 2007 follow the trend of the highest counts consistently found along Peascod Street, in King Edwards Court and around Thames Street. The focus of Windsor Castle at the very top of Peascod Street can explain high footfalls in this area. The opening of Windsor Royal Station in 1997 has led to a more varied circulation pattern of pedestrians.

2.26 The areas that receive the lowest footfall counts are often peripheral secondary shopping areas such as St Leonards Road and William Street with few national multiples; these are also places farthest from the Castle and associated tourist attractions. The pedestrian flows for 2007 are consistent with these findings from previous years.

Figure 1.2: Windsor Pesdestrian Flowcount



Cyclist Counts

2.27 Cyclist counts were conducted weekdays from 7am–7pm in September 2007. They represent complete cordons around the town centre, each site being surveyed on a single day to minimise impacts of day-to-day variability. Weather conditions were selected to be as consistent as possible.

2.28 The peak flows follow commuter times, showing high counts in the mornings at 8–9am inbound and 5-6pm outbound (see figures1.3 and 1.4). Interestingly an increased number of cyclists can be seen at around 3pm, possibly a reflection of school finishing times.

2.29 The cyclist counts provide a useful indication of how people access Windsor town centre. The highest count at any given time was 57, but the pedestrian count taken at the same time confirms that high numbers of people are in the town. This would suggest that many opt for alternative modes of transport. The cyclist counts could be indicative of the distance people travel from, since it is unlikely that people would cycle great distances. By this token, when compared to the pedestrian count, the information suggests that people travel from a wide catchment.

Figure 1.3: Windsor Cyclists (Inbound)

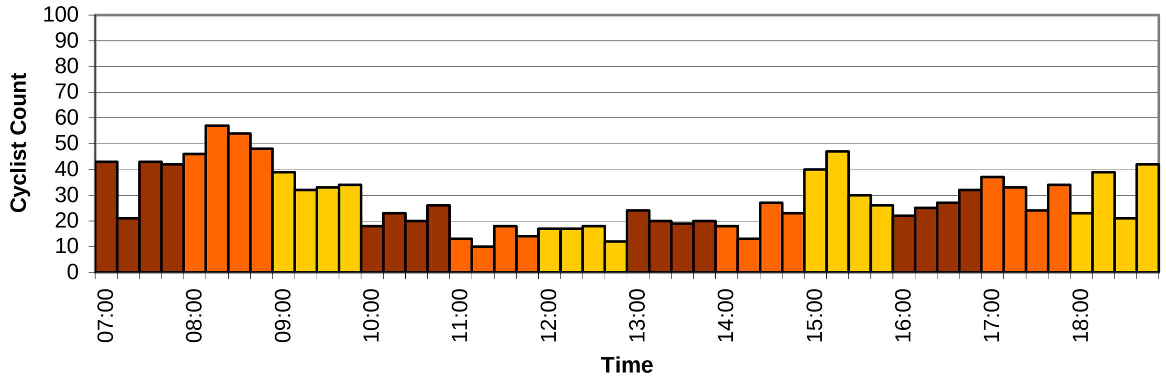
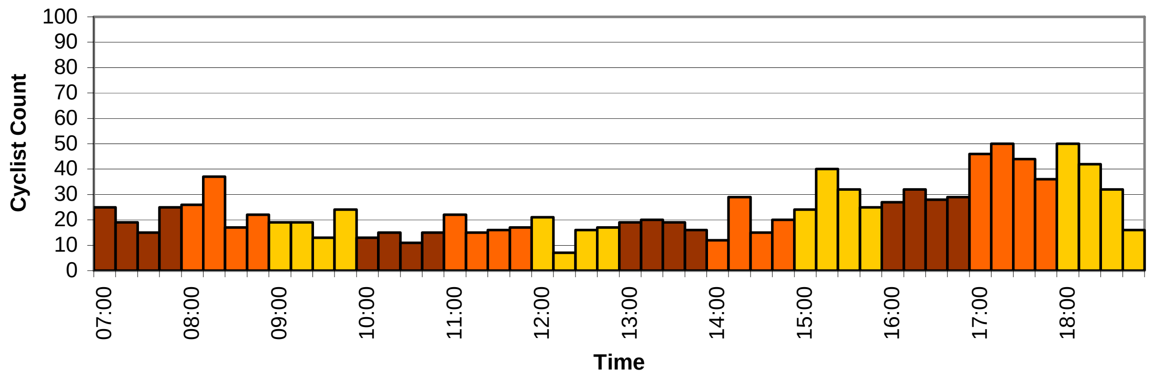


Figure 1.4: Windsor Cyclists (Outbound)



(Source: RBWM Transport Surveys)

Accessibility

2.30 A large percentage of Windsor Retail Centre is pedestrianised, including Peascod Street, King Edward Court and Windsor Royal Station.

2.31 Two railway stations, Windsor and Eton Central and Windsor and Eton Riverside, serve the town centre:

- Windsor and Eton Central is a fast link to Slough, whence it is possible to connect for London Paddington station, Maidenhead and the South West.
- Windsor and Eton Riverside Railway line links to London Waterloo station (this journey takes about 1hr).

2.32 Since Windsor retail centre is pedestrianised, bus stops are located on the periphery around Victoria Street, High Street and Thames Street. Passenger benefit from Real Time Bus Information being provided at bus stops.

2.33 There are two Park and Ride schemes serving the town centre; from Home Park Car Park, St. Albans Street and from Legoland Windsor.

2.34 Despite being extensively pedestrianised, both on and off road parking is available. The off-street parking serving the retail centre is available at various locations (see table 1.8).

Table 1.8: Car Parking Available in Windsor (Prices at March 2008)

Site	Spaces	Type	Stay	Cost		
				1hr	2hr	3hr
Victoria Street	206	Multi-storey	Long	£0.90	£1.80	£2.90
East Berks College *	112	Surface	Long	£0.80	£1.40	£2.00
King Edward Court	960	Multi-storey	Long	Privately owned - prices not set by RBWM		
River Street	145	Surface	Short	£2.70	£4.30	£6.00
Thames Avenue	100	Surface	Long	Privately owned - prices not set by RBWM		
Alexandra Gardens	198	Surface	Long	£0.90	£1.80	£2.70
Windsor Library	15	Surface	Short	£2.00	£4.00	-
Dials *	250	Multi-storey	Long	£0.90	£1.80	£2.70
Alma Road	101	Surface	Long	£0.90	£1.80	£2.70

*(Source: RBWM website) * Weekend parking only*

2.35 Windsor town centre offers a Shopmobility service from the King Edward Court Car Park for those who have difficulty walking. The service operates Monday to Saturday 10am – 5pm and costs a small fee for the hire of equipment (manual or powered wheelchairs/ scooters) or an escort to accompany shoppers in need of extra assistance.

Public Perceptions

2.36 In a public consultation regarding the Local Development Framework (LDF) held in Feb/Mar 2006, many respondents commented on the retail centres of Windsor and Maidenhead. Some of the key issues for Windsor were:

- Too many restaurants.
- Too many shops aimed at tourists, neglecting the needs of the local residents.
- Parking issues are causing stores to close e.g. Caleys (John Lewis store).
- There are not enough facilities aimed towards young people in the centre and in Windsor as a whole e.g. a Cinema.

Windsor Town Centre Health Check

Perception of Safety & Occurrence of Crime

2.37 The statistics for Windsor and Maidenhead have been sourced from Thames Valley EIS system[5]; this information covers a twelve-month period for each crime year, which starts in April and ends in March.

2.38 The statistics are reviewed over time rather than against other areas within the Royal Borough because all the centres are considered to have their own unique character.

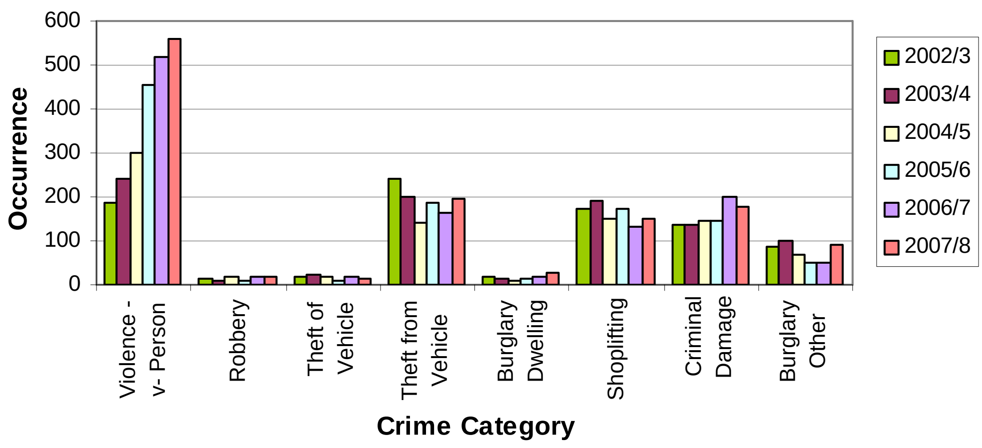
2.39 The police beat for Windsor exceeds the boundaries of the retail centre but this is still a fairly apt representation of how people perceive safety within the centre.

Table 1.9: Crime Statistics for Windsor

Crime Category	2002/3	2003/4	2004/5	2005/6	2006/7	2007/8
Violence -v- Person	186	242	302	454	516	557
Robbery	12	7	19	8	19	16
Theft of Vehicle	17	22	17	11	19	12
Theft from Vehicle	241	199	142	187	165	194
Burglary Dwelling	19	13	9	13	20	26
Shoplifting	175	189	151	171	131	151
Criminal Damage	137	135	146	144	199	176
Burglary Other	87	99	70	49	51	91

(Source: Thames Valley Police)

Figure 1.5: Crime Statisitics for Windsor



2.40 The majority of crime categories have shown a decrease since 2002 or remained relatively static with the exception of violence against the person, which has risen from 186 in 2002/3 to 577 in 2007/8. Criminal damage, robbery and theft of vehicle have all seen a decrease in occurrence in the last year. (For more information please contact Thames Valley Police).

2.41 Policing priorities within Inner Windsor have been identified by the general public as anti-social behaviour from young people (underage drinking and litter), dangerous parking & related highway obstructions, and a need for more visible policing.

5 Enterprise Information System – this system gathers data for management information and performance indicators.

Environmental Quality

2.42 Windsor town centre has a high level of environmental quality due to its setting alongside Windsor Castle and the presence of many other historical buildings. A large proportion of the town centre is also located within a Conservation Area, which helps to preserve a pleasant environment and the urban character of the town. The close setting of the Thames and public open spaces such as Bachelor's Acre and Alexandra Gardens also assist in making this a pleasant shopping area.

2.43 Good quality street furniture and level surfaces around the shopping centre were enhanced by the pedestrianisation of Peascod Street. There is also a low level of graffiti and litter; it is considered that all these factors contribute to making Windsor a highly attractive town centre.

Conclusion

2.44 Using the PPS6 indicators, it is apparent that Windsor is a healthy town centre, with a diverse selection of retail representations. There are many retailers wanting representation in the area, yields are low and rents are strong, illustrated by a low vacancy rate.

2.45 The character and nature of Windsor is different from other comparative centres in the Royal Borough due to high levels of tourism. Overall, the environment of Windsor town centre is of high quality and the centre exhibits good levels of vitality and viability as measured by the appropriate indicators.

3 Maidenhead Town Centre Health Check

Form and Function

3.1 Maidenhead has a local catchment area; described in the Berkshire Structure Plan 2001 – 2016 as providing "*an important centre for both convenience and comparison shopping for the urban area and its surrounding catchment*". In addition to this Maidenhead possesses a range of specialist and non-food shops. The main retail centre comprises of:

Primary Shopping Area	High Street West (East of Post Office) Nicholsons Walk Queens Walk
Inner Secondary Shopping Area	Queen Street North High Street East Market Street St Mary's Walk King Street North High Street West
Outer Secondary Shopping Area	King Street South The Colonnade Bridge Street Queen Street South Providence Place Bridge Avenue

3.2 The High Street and Nicholsons Shopping Centre form the core of Maidenhead's town centre providing a pedestrianised area with planting and seated areas. The secondary shopping centres are to the south along King Street and Queen Street heading towards the railway station, and to the east along Bridge Street up to Waitrose. See Proposals Map 1 of the Adopted Local Plan (1999). The survey has been extended this year to include additional outer shopping areas.

Diversity of Use

3.3 Biannual retail surveys are carried out in Maidenhead recording shop use frontage, vacancy rates and changes in Use Class. The most recent retail survey for Maidenhead was carried out in February 2008:

Table 2.1: Use Classes in Maidenhead Town Centre

Use Class	2006	2007	2008
A1	206	202	205
A2	41	38	42
A3	34	31	32
A4	13	13	13
A5	10	12	14
Other	13	19	21
Total	**317**	**315**	**327**

(Source: RBWM Retail Surveys)

3.4 There was a reduction in two retail units along Queen Street following the re-development of part of No. 41 Queen Street and No. 74, which has gone from being two units to one. The amalgamation of five retail units into three in the Nicholosons centre due to redevelopment, and the additional monitoring of Providence Place and Bridge Avenue can account for the new higher figure for retail units in Maidenhead for 2008.

3.5 The composition of shops has been ordered by three main definitions: Comparison, Convenience and non-retail Services. The proportions have remained similar year on year. Even accounting for Maidenhead centre being smaller than Windsor, it still has proportionately fewer comparison shops. This is an indication that Maidenhead retail centre is aimed towards local consumers. These comparative stores are located in the primary shopping areas along the High Street and in the Nicholsons Centre.

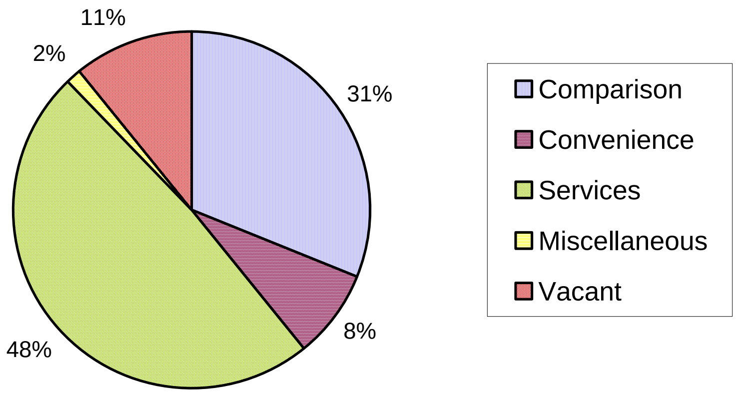
3.6 Service outlets account for almost half the composition of retail in Maidenhead, varying from cafes and restaurants to hairdressers, estate agents and banks.

Table 2.2 Composition of Uses in Maidenhead Town Centre, February 2008

Type of Use	Number of Units Surveyed	Percentage of Overall Units
Comparison	102	31
Convenience	26	8
Services	159	48
Miscellaneous	5	2
Vacant	35	11
Total:	327	100

(Source RBWM Retail Surveys)

Figure 2.1: Composition of Uses in Maidenhead Town Centre, February 2008



(Source: RBWM Retail Surveys)

Retailer Representations and Intentions to Change Representations

3.7 There are a healthy number of multiples represented within Maidenhead town centre including: Next, Top Shop, Boots, Tesco, Sainsbury's, Waitrose, Marks and Spencer's, Woolworths, W H Smith, Argos, New Look and Zavvi. However there is public demand for a department store.

3.8 Maidenhead's Town Centre Manager understands that there are 62 retailers wishing to be represented within Maidenhead. These include national multiples TK Maxx, BHS, Millets and River Island amongst others. To date these are not represented in the town centre.

3.9 A hinderance to these retailers acquiring their desired representation in Maidenhead has been a lack of suitable units at the sizes they require. The most recent development in the centre was the office and leisure development at Grenfell Island, which included the development of a new cinema complex, Ivory Lounge, Pizza Hut, Noodle Bar and a David Lloyd Health Club, but no larger units. However, the Nicholsons Shopping Centre is now under new ownership and ING Real Estate has recently announced intentions to redevelop a substantial slice of Maidenhead town centre to create a mixed-use scheme linking the existing retail core with the town's railway station, providing substantial new retail space, parking and offices[6].

3.10 Table 2.3 shows the historical demand for retail representation in Maidenhead since 1997. This information is from the Town FOCUS report for Maidenhead.

Table 2.3: Historical No. of Retailers Wishing to be Represented in Maidenhead Town Centre	
Apr 05	67
Oct 04	70
Apr 04	76
Oct 03	88
Apr 03	83
Oct 02	82
Apr 02	75
Oct 01	63
Apr 01	71
Oct 00	58
Apr 00	58
Oct 99	46
Apr 99	54
Oct 98	48
Apr 98	52
Oct 97	51
Apr 97	43

(Source: Maidenhead Focus Report)

Shopping Rents

3.11 The latest Colliers CRE 'In Town Retail Rents' research paper provides retail rental rates from 2000 to 2007 for the 609 open market Zone A shopping locations in the UK. Table 2.4 highlights the rental levels for Maidenhead over this period compared to neighbouring town centres.

Table 2.4: Comparative Zone A Rental Levels (£/square feet.)

Centre	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**
Reading	200	225	225	225	230	230	230	240
Windsor	125	130	130	130	130	135	160	165
Slough	110	100	95	100	100	105	105	105
Maidenhead	**95**	**95**	**100**	**100**	**100**	**110**	**110**	**110**
Bracknell	90	80	90	90	110	110	110	115
High Wycombe	75	80	85	85	85	90	90	90

(Source: Collier CRE 'In Town Retail Rents)

3.12 Retail rental levels offer a good indication of town centre health; Maidenhead is showing a consistent demand for floor space, currently static at approximately £110 p. sq. ft. Indeed, according to Shopproperty.co.uk a unit available on the High Street as at March 2008, is asking a rental value of £108, 950 p. a. The rental level for Maidenhead in 2007 is above the average rent for the South East, which stood at £105 p. sq. ft in the same period. This is a competitive rate compared to surrounding town centres, fairing

[6] Source: http://www.rbwm.gov.uk/web/news_40107_maidenhead_rejuvenation.htm

higher than nearby Slough, and only £5 p. sq. ft below that of Bracknell. It is also important to note that the figure for the South East is derived from an average of town centre rents, including Bluewater, Southampton and Milton Keynes.

3.13 Presently the UK retail industry has to cope with a succession of interest rate rises since summer 2006. Interestingly the FOCUS Retail Demand Report 2007, states that the UK market has seen a resurgence of previously struggling retailers e.g. Marks and Spencer and Sainsbury's. The latter of whom has had a large redevelopment and increased floor space in Maidenhead.

Vacancy Rates

3.14 Table 2.5 shows vacancy rates collated from data collected during biannual retail surveys for Maidenhead.

Table 2.5 Vacancy Rates, Maidenhead	
Feb.2001	10.9%
Nov.2001	6.6%
Feb.2002	7.9%
Nov.2002	7.9%
Feb.2003	8.5%
Nov.2003	5.1%
Feb.2004	6.3%
Nov.2004	6.0%
Mar.2005	6.6%
Oct.2005*	8.5%
Apr.2006*	8.8%
Sep.2006**	11.4%
Feb.2007**	10.5%
Sep. 2007**	9.1%
Feb. 2008**	10.7%

(Source: RBWM Retail Surveys)

**Temporary increase in vacancy levels due to redevelopment of Sainsbury's.*

*** Closure of three units within the Nicholsons Centre for expansion.*

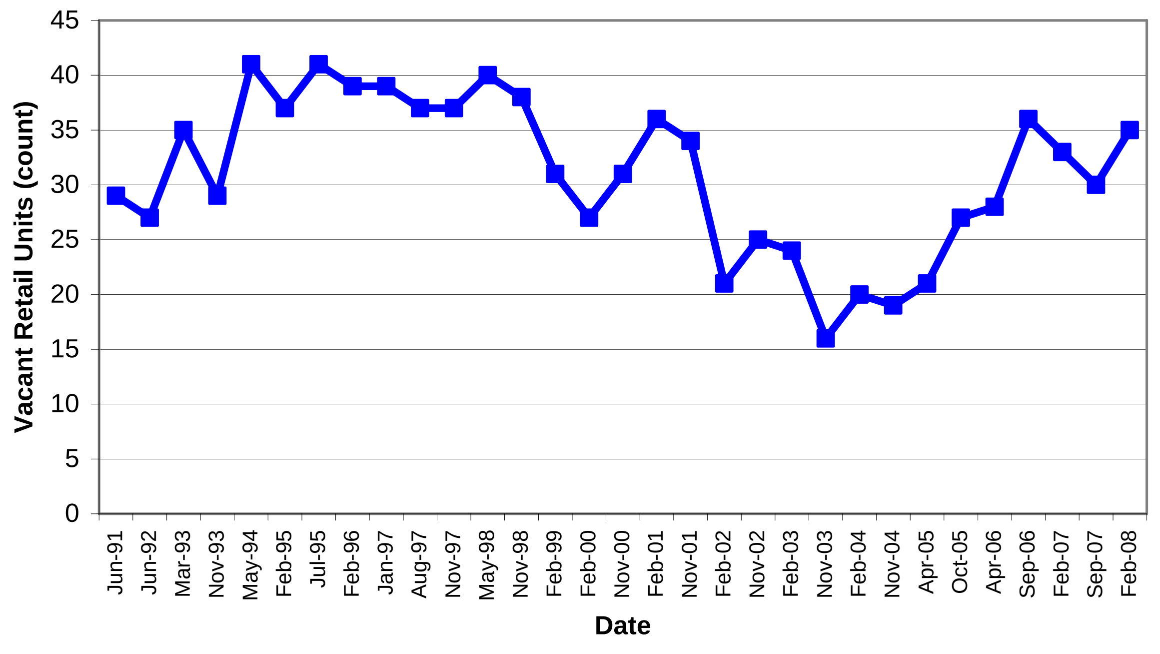
3.15 The most recent retail survey conducted by the Borough (February 2008) shows there are 35 vacant properties (10.7%). This is higher than the national average vacancy rate for properties in England, which the Communities Local Government stated was 9% for the South East at 2004/5.

3.16 Historical vacancy rates in Maidenhead town centre since 1991 can be seen in figure 2.2. As before, this data has been taken from RBWM biannual retail surveys, and it is important to note that the total number of retail units has changed over time. Vacancy rates partly reflect national economic trends, but were generally declining (showing improvement) until the recent deterioration in retail conditions in Maidenhead over the last two years (in particular along Queen Street).

3

Maidenhead Town Centre Health Check

Figure 2.2: Historical Vacancy Rates in Maidenhead



(Source: RBWM Retail Surveys)

Commercial Yields

3.17 Table 2.6 is taken from the July 2007 Property Market Report published by the Valuation Office, showing time series data on retail property yields for Maidenhead from Spring 2001 to Summer 2007. For detailed information regarding the value of Retail Property Yields see paragraph 2.5.

Table 2.6: Retail Property Yields

Date	04/01	10/01	04/02	10/02	04/03	01/04	07/04	01/05	07/05	01/06	07/06	01/07	07/07
Slough	6.75	7	8	8	7.25	6.5	6.5	6.5	5.5	4.5	4.5	4.5	4.5
Reading	6.5	6.5	6.5	6.5	6.5	6.5	6.5	6.5	5.5	4.5	4.5	4.5	4.25
Maidenhead	6.25	6.25	6.25	6.25	6.25	7	7	7.5	6.5	6	6	5.25	5.25
Windsor	5.75	6	6.75	6.75	6.25	6.25	6.25	5.5	4.75	4.25	4.25	4.25	4.25
Bracknell	7	7	7	7	7	7	7	7	6.5	6	6	6	6

(Source: The Valuation Office)

3.18 Maidenhead's retail property yields have remained high in comparison to other town centres in the region. However a recent trend has shown some improvement, and the retail property yield for Maidenhead is at its lowest for five years.

Footfall Counts

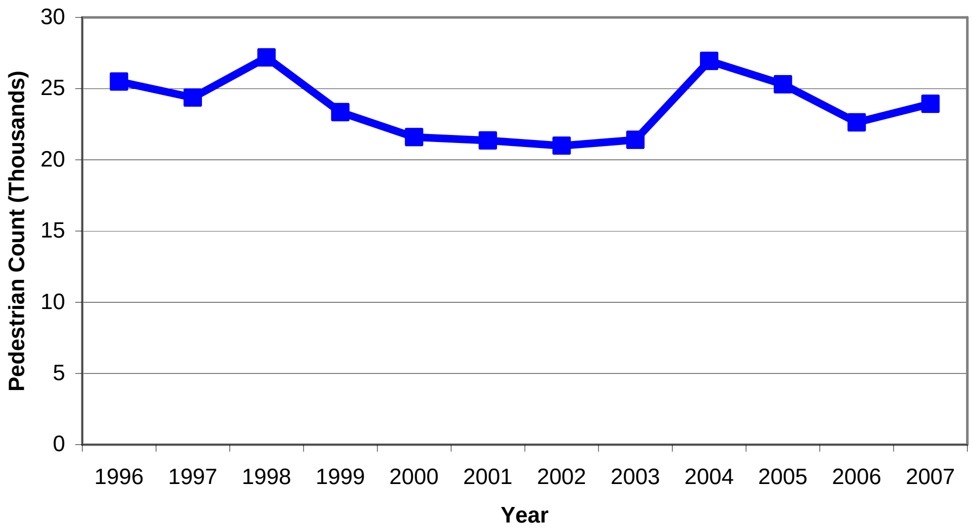
3.19 The annual footfall surveys for Maidenhead are undertaken by PMRS in October every year, the most recent survey being on Friday 5th and Saturday 6th October 2007. The footfall is recorded at 30 sites. These records are available upon request from the Planning Policy Unit.

3.20 Table 2.7 and figure 2.3 show that, on average, pedestrian flows have remained relatively consistent since 1996 with only minor fluctuations. The biggest fluctuation was between 2003 and 2004 with an increase of 5,540. Footfall has increased since the 2007 Retail Health Check Report.

Table 2.7: Average Footfall in Maidenhead	
Year	**Average Count (In Thousands)**
1996	25.5
1997	24.37
1998	27.19
1999	23.35
2000	21.6
2001	21.37
2002	21
2003	21.41
2004	26.95
2005	25.31
2006	22.64
2007	23.94

(Source: PMRS Footfall Survey)

Figure 2.3: Maidenhead Pedestrian Flowcount



3.21 The collection and collation of this data has revealed changes in the behaviour of pedestrian movement. As would be expected in any town centre, some routes are favoured more than others. In July 1996 the highest pedestrian count was recorded outside Marks and Spencer in the High Street, and the lowest outside 66 King Street. This remained the case until 1999 when the lowest count was outside 3 Providence Place (near Sainsbury's).

3.22 In 2000 the peak flow was recorded on High Street Mall just at the entrance of the Nicholsons Shopping Centre. By 2002 this peak flow had moved further inside the precinct. Once again the lowest count was recorded at 3 Providence Place.

3.23 The most recent pedestrian count taken in October 2007 shows that the highest pedestrian flow was recorded outside Marks and Spencer, the same as the previous three years, whereas the lowest pedestrian count is now found outside 4 Bridge Avenue. In recent years the lowest count has been recorded along St. Mary's Walk, but the completion of the Sainsbury's redevelopment appears to have increased footfall.

3.24 Using these pedestrian flow counts, the most popular throughfares are along the eastern part of the High Street between the junction with Queen Street / High Street Mall in the Nicholsons Centre and the Nicholsons Centre itself.

3.25 The pedestrian flows proving the least popular include the southern section of Queen Street, which is also characterised by a high proportion of vacant retail outlets. Similarly the southern section of King Street has notably low footfall counts, possibly the result of pedestrians entering the centre from the North (where the majority of residential areas and car parking facilities are located).

3.26 Pedestrian flows reflect Maidenhead town centre's designated primary and secondary shopping areas. Numbers are highest at commuter times and at lunchtime. This would suggest that the workforce of Maidenhead are important and use the retail services provided.

3.27 High pedestrian flow counts can also be seen around car parks, in particular the car park associated with the Nicholsons Centre and the car park on West Street.

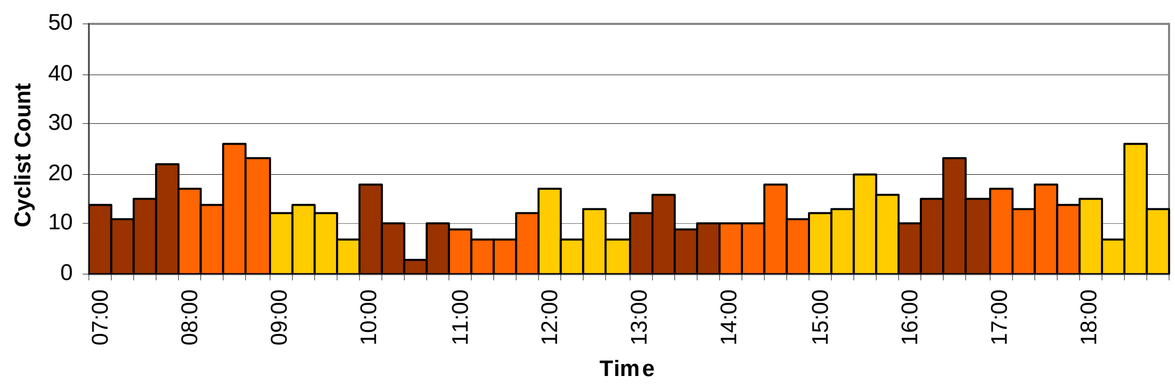
Cyclist Counts

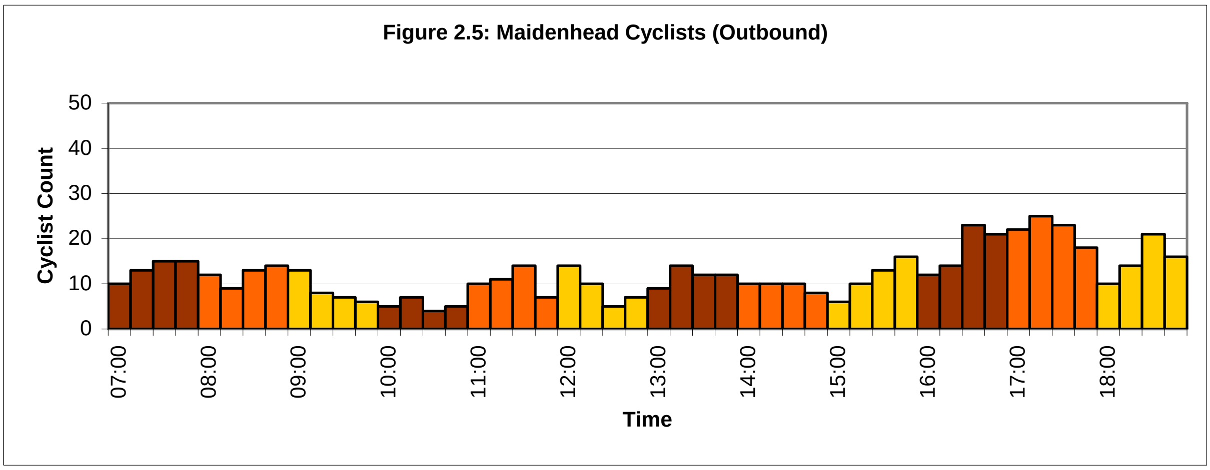
3.28 Cyclist counts were conducted weekdays from 7am – 7pm in September 2007. They represent complete cordons around the town centre, each site being surveyed on a single day to minimise impacts of day-to-day variability. Weather conditions were selected to be as consistent as possible.

3.29 Peak cycle flows (inbound and outbound) reflect commuter times (see figures 2.4 and 2.5). Actual numbers of cyclists are surprisingly low for a town of Maidenhead's size, indicating alternative transport is used. Indeed the numbers of pedestrians seen on King Street and Queen Street suggests that the train is a popular form of transport.

3.30 Unlike with pedestrian counts, cyclist flows do not increase at lunchtime, suggesting that it is mainly commuters who use this mode of transport. An additional consideration is that cycling assumes a local distance is travelled – the generally low counts indicate Maidenhead has a wide workforce catchment.

Figure 2.4: Maidenhead Cyclists (Inbound)





(Source: RBWM Transport Surveys)

Accessibility

3.31 Despite partial pedestrianisation, local residents predominately access Maidenhead retail centre through the use of privately owned vehicles. Cycle assess is deemed an area for improvement.

3.32 There is one train station serving Maidenhead retail centre, which is mainly used by commuters as it provides a fast service to London Paddington in addition to services to Reading and the South West.

3.33 It has been proposed for Maidenhead to be a Crossrail terminus, providing an affordable railway, with a high frequency, convenient and accessible train services across the London from 2017. The route will go from Maidenhead and Heathrow in the west right across the capital into Essex and Kent in the east. It will travel underground through the city centre between Paddington and east London. The bill is currently still going through parliament[7].

3.34 There are a number of bus services supplying Maidenhead town centre, with stops in the centre e.g. at the corner of High Street/ Queen Street, and around the perimeter e.g. Frascati Way. Improvements have been made to the legibility of services to passengers by Real Time Bus Information boards. Services do not run into the evenings but there are some on Sundays.

3.35 There are numerous long and short stay car parks in and around the town centre, which provide accessibility to car users (see table 2.8). The long stay car parks tend to be on the periphery of the centre, whereas the short stay shopper's car parks are within the retail centre. This ensures there is high space turnover in convenient locations.

Table 2.8: Car Parking Available in Maidenhead (Prices at March 2008)

Site	Spaces	Type	Stay	Cost		
				1hr	2hr	3hr
Magnet Leisure Centre	248	Surface	Long	£0.70	£1.30	£2.00
Grove Road	82	Surface	Short	£0.80	£1.50	-
Hines Meadow	1280	Multi-storey	Long	£0.80	£1.60	£2.40
Nicholsons	734	Multi-storey	Long	£0.80	£1.60	£2.40
Town Hall*	111	Surface	Short	£0.80	£1.50	£2.20
Stafferton Way**	576	Multi-storey	Long	£4.00	£4.00	£4.00
West Street	59	Surface	Short	£0.80	£1.50	£2.20

**Evenings only* ***Price is for all day parking*

[7] Source: www.crossrail.co.uk

Maidenhead Town Centre Health Check

3.36 Maidenhead town centre offers a Shopmobility service from the Nicholsons Centre for those who have difficulty walking. The service operates Monday to Saturday 10am – 5pm and costs a small fee for the hire of equipment (manual or powered wheelchairs/ scooters) or an escort to accompany shoppers in need of extra assistance. Shopmobility has been available in Maidenhead for 12 years.

Public Perceptions

3.37 Since 2006 there have been two public consultations in which respondents have been presented with the opportunity to comment on Maidenhead town centre. The first consultation was held in Feb/Mar 2006 in connection with Local Development Framework. The key issues raised in relation to Maidenhead were:

- No need for any further supermarket development.
- There is a need to attract independent stores back into the area.
- A need to visually enhance Maidenhead, for instance shop frontage needs to be improved; more planting and more places to sit.
- Accessibility to the centre needs to be improved. Public transport should become more frequent, cheaper and run on Sundays/ into the evening.
- Farmers Market should become more of a feature and continue to promote local produce.
- There are too many fast food and drinking establishments, which to many make the area feel unsafe and look untidy.
- Need a central focal point for the town, for instance a town square.

3.38 More recently a consultation was held for the Maidenhead Town Centre Plan during February 2007. The main issues raised during this consultation were:

- 60% of respondents were in favour of more shops in the identified areas of West Street, Broadway and the east end of the High Street.
- 77% supported a more mixed town centre, with a balance of office, retail and residential properties.
- 87% saw a need for stronger connections between the town centre and the River Thames.
- The majority of respondents support the need for more public spaces for landscaping and gardens (73%) and spaces for markets and fairs (71%).
- 88% agreed that the town centre should be accessible by all forms of transport.
- Popular buildings were identified; this included the Town Hall, the Clock Tower, Cressett Towers, Queen Ann House (on the Broadway) and St Mary's House. All of which were considered to be good reference points for future design in the town centre.
- Respondents recognised a need to harmonise new buildings with the existing and diverse streetscapes, more recent buildings that have been considered to achieve this include the Library, the 3 building and Grenfell Island.
- Taller buildings were largely considered eyesores not because of there height but because they were regarded as ugly.

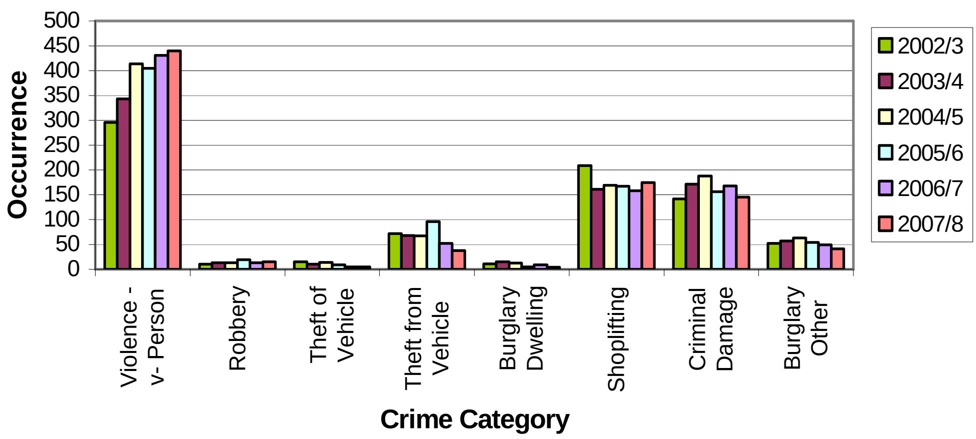
Perceptions of Safety & Occurrence of Crime

3.39 The statistics below have been obtained from Thames Valley Police. The data has been reviewed over time rather than against other areas within the Royal Borough because all the centres are considered to have their own unique character.

Table 2.9: Crime Statistics For Maidenhead						
Crime Category	**2002/3**	**2003/4**	**2004/5**	**2005/6**	**2006/7**	**2007/8**
Violence Against the Person	296	343	414	405	431	440
Robbery	10	13	13	19	13	15
Theft of Vehicle	15	10	14	9	5	5
Theft from Vehicle	72	68	67	96	52	38
Burglary Dwelling	11	15	12	5	9	4
Shoplifting	209	161	169	167	158	175
Criminal Damage	142	171	188	156	168	145
Burglary Other	52	57	63	54	49	41

(Source: Thames Valley Police)

Figure 2.6: Crime Statistics for Maidenhead



3.40 Maidenhead's biggest rise in crime has been within the category of violence against the person, which is in line with the trend in Windsor. Violence against the person has risen from 296 incidences in 2002/3 to 440 in 2007/8. Incidences of criminal damage and shoplifting also remain relatively high, whilst theft from a vehicle has decreased in recent years.

3.41 Despite extensive CCTV coverage within the retail centre, crime occurrences are still relatively high. This has a negative impact on local perceptions of safety; there are several areas within the centre that could be enhanced in order to improve perceptions of safety. These sites include the Green Way and along York Stream, the former cinema at the junction of the Green Way / High Street and some of the buildings along Queen Street.

3.42 The current top three policing priorities identified by the public for the town centre are parking & obstruction problems (particularly in bus stops and pedestrian areas), anti-social behaviour by young people (noise, litter and intimidation issues) and shop theft.

Environmental Quality

3.43 The environment of the shopping area along the pedestrian section of the High Street has been enhanced by the presence of raised planters, good quality street furniture and bins, making it a pleasant shopping area. Over the last two years improvements have been made to various properties along the High Street as a result of enforcement action. This has included improvements to the frontage of Cresset Towers and No 6 High Street.

3

Maidenhead Town Centre Health Check

3.44 King Street has recently seen a number of environmental improvements with the development of Grenfell Island at the southern end, road surface improvements and the addition of new street furniture at the northern end. Combined these factors help to increase the attraction of Maidenhead to shoppers.

3.45 The southern part of Queen Street is an area in particular need of enhancement. Vacant properties and unattractive shop frontages characterise this alternative route to the main shopping area. It is a busy traffic route through the centre of the town. These factors all detract away from this secondary shopping area.

3.46 The former cinema site on the corner of the High Street and the Green Way is in need of redevelopment. As it currently stands the building has graffiti and thus contributes to the perception of the area being unsafe. (A recent planning application for an office development on the site was refused in April 2008, but the principle of office development has been accepted). Improvements are also needed along the Green Way, although there has been some recent renovation.

3.47 A significant proportion of Maidenhead town centre is within a Conservation Area; consequently the original character of the town is preserved as far as possible.

3.48 The densely built urban centre does not favour public squares or parks that frequently constitute open space. However the Maidenhead Town Centre Conservation Area Statement perceives that the pedestrianisation of much of the High Street provides a traffic free environment that serves as a valuable addition to open space in the town. Grenfell Park and Kidwells Park are located adjacent to the centre but it is difficult to reach them due to the ‘ring road’ dual carriageway. This means the parks are only accessible via subways or major crossings, which are never desirable pedestrian routes. The parks are considered ancillary to the town centre not integral. Indeed in two recent consultations, many people have commented on the need for a town square to provide a central fixture with the open space.

3.49 The Maidenhead Waterways Restoration Group (MWRG) was established in 2006 with the aim of restoring the original waterways through the town centre to a navigable standard, bringing boats and water related amenities back into the centre of Maidenhead and stimulating much needed regeneration in that part of the town. This is a voluntary organisation working in partnership with the Council, Environment Agency and other national and local groups[8].

3.50 The Council have identified Maidenhead as an area to be revitalised with the aim of making a ‘good town even better’. This is being undertaken by the Partnership for the Regeneration of Maidenhead (PRoM), a cross-party group created by the council with an independent chairman charged with steering the regeneration. PRoM is pursuing actions on three fronts:

- Devising a Masterplan and strategy which will include Development Briefs for key areas;
- Looking to progress one or more of these areas as a priority;
- Ensuring that its work on a Vision for the town centre runs parallel to and informs the new Local Development Framework which will replace the Local Plan.

Conclusion

3.51 Maidenhead retail centre, although relatively healthy, has plenty of scope to improve its status. In terms of vitality, the centre scores well with moderate yields, strong retailer demand and high rents. Additionally improvements in recent years to King Street/ Grenfell Island and Providence Place have improved the environmental quality of the centre.

[8] Source: www.maidenheadwaterways.org/

3.52 The centre has a strong level of 'multiple' representations, although a more diverse selection of retail, services and leisure facilities would improve the centre even further. The diversity of retail uses in Maidenhead show a town that meets the needs of the community rather than encouraging visitors. Vacancy rates are currently quite high, some of which can be accounted for by the temporary closure of several retail units within the Nicholsons Centre for redevelopment, but vacancy rates do tend to reflect the economic retail market as a whole. Retail rents are currently static, but have increased marginally over the last six years.

3.53 There are plenty of car parking facilities available making the town accessible to those who have a motor vehicle, however for those who do not public transport needs to be improved. In particular the bus service which needs an increase in the services available. Yet despite these shortfalls, the footfall counts show that Maidenhead has a relatively consistent visitor attraction, and has actually seen an increase in pedestrian numbers in the last three years.

3.54 Many parts of the town centre would benefit greatly from environmental improvements, in particular the peripheral outer secondary shopping areas such as Queen Street. However the recent establishment of PRoM is set to create a vision for regeneration in Maidenhead, which will address these issues.

4 Health Check of Ascot and Sunningdale District Centres

4.1 Ascot and Sunningdale are both classified as district retail centres within RBWM. They provide convenience shops to meet the day-to-day requirements of the local catchment area. *'District Centes will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as, banks, building societies and restaurants, as well as local public facilities such as a library' (PPS6).* See Proposal Map 4 of the Adopted Local Plan (1999) for Ascot and Sunningdale district centres.

Form and Function

4.2 Ascot - Ascot district retail centre is linear following the High Street. Retail is predominantly located along the northern side.

4.3 The retail provision is a mixture of convenience and comparison outlets to serve local needs. There are a large number of services including: banks, hairdressers and cafés/restaurants. Additionally Ascot retail centre offers a number of high quality, expensive shops to cater to an affluent market, comprising of up-market car sales, clothing boutiques and interior designers.

4.4 Sunningdale - Sunningdale district retail centre is somewhat unique, comprising of two divided core areas separated by a railway line. On the southern side of the railway along the London Road, the main focus is the Waitrose store (1,450 m²). However this core area also provides specialist comparison goods stores, restaurants and financial services.

4.5 To the northern side of the railway line the other core retail area is primarily located along Chobham Road. The majority of retail facilities in this area are up-market and high quality, reflecting the affluent community. There are a number of comparison goods outlets on Chobham Road including clothing boutiques, interior designers and homeware stores. The services provided include banks, cafés and hair/beauty salons. This core area also encompasses retail facilities on the London Road including a large Majestic Wine Warehouse and a musical instrument retailer.

Diversity of Uses

4.6 Ascot – Biannual retail surveys are conducted in Ascot to record the usage of each retail unit. Maintaining accurate information is essential to ensure the composition of uses within Ascot retail centre remains as diverse as possible. Table 3.1 and Figure 3.1 show the composition of uses for this core area at February 2008.

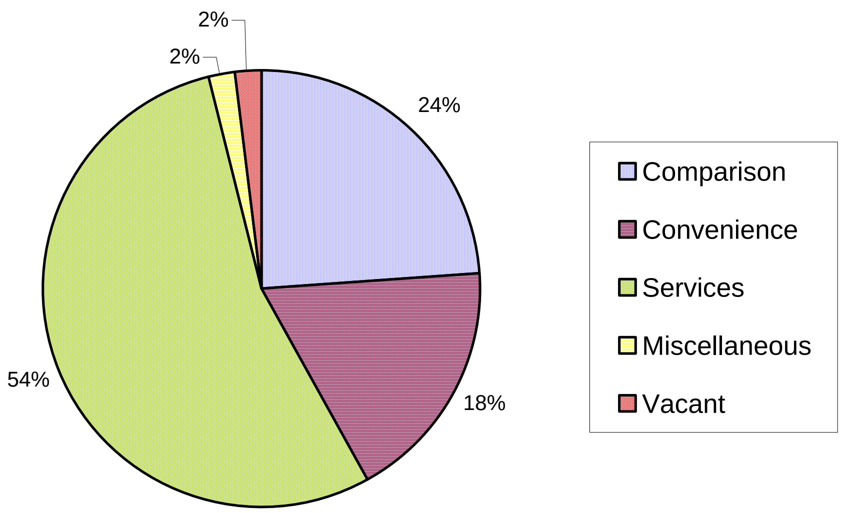
Table 3.1: Composition of Uses in Ascot District Centre, February 2008

Type of Use	Number of Units Surveyed	Percentage of Overall Units
Comparison	13	24%
Convenience	9	18%
Services	26	54%
Miscellaneous	1	2%
Vacant	1	2%
Total	50	100%

(Source: RBWM Retail Survey, February 2008)

Health Check of Ascot and Sunningdale District Centres

Figure 3.1: Composition of Uses in Ascot District Centre, February 2008



4.7 As illustrated in Figure 3.1 Services account for over half the retail unit usage in Ascot, varying from Cafes and estate agents to hairdressers. Whilst this number may seem high, it is important to remember that many different services are encompassed within this category.

4.8 Convenience facilities in the area include a small Budgens, butchers, bakers and newsagents. This demonstrates that whilst the area is deemed prestigious as a result of proximity to the racecourse, it does still meet the needs of local residents.

4.9 Comparison good shops in Ascot tend to reflect the affluence of the surrounding area, consisting of clothes boutiques, an expensive hardware store and a car showroom.

4.10 Sunningdale – Biannual retail surveys are conducted in Sunningdale to record the usage of each retail unit. Table 3.2 and Figure 3.2 show the composition of uses in the retail centre as it was at February 2008.

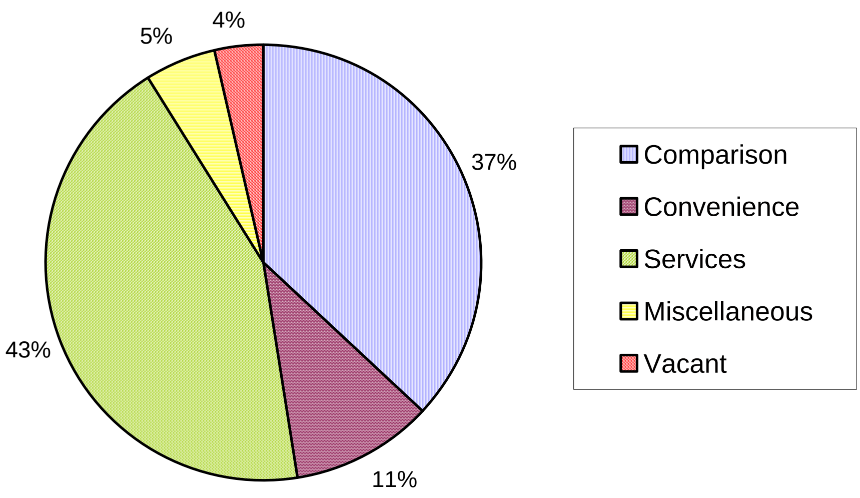
Table 3.2: Composition of Uses in Sunningdale District Centre, February 2008

Type of Use	Number of Units Surveyed	Percentage of Overall Units
Comparison	21	37%
Convenience	6	11%
Services	25	43%
Miscellaneous	3	5%
Vacant	2	4%
Total	57	100%

(Source: RBWM Retail Surveys, February 2008)

Health Check of Ascot and Sunningdale District Centres

Figure 3.2: Composition of Uses in Sunningdale District Centre, February 2008



4.11 The convenience stores located within Sunningdale also tend to be focused towards the local affluence of the area providing up-market stores, for instance Waitrose and a specialist butcher. This trend is also apparent in the style and quality of comparison goods outlets as well as the services provided, including cafés, boutiques and beauty salons.

Retailer Representations and Intentions to Change

4.12 Ascot - Retail representation is a suitable balance between independent retailers and national multiples. Notable examples of the latter include Budgens, Blockbuster Video, Toni and Guy, Starbucks and Wine Rack. The independent stores provide high quality goods and services, allowing the retail centre to offer an alternative shopping experience to larger towns.

4.13 The convenience shopping facilities in Ascot principally allow top-up weekly shopping, catering for local needs. The convenience units in Ascot consist of a small Budgens with a floor space of 840m², a specialist butchers, bakery, newsagents/post office and a Smile convenience store attached to the Esso petrol station. According to the G L Hearn's 'Retail and Leisure Study' 2006 for RBWM, the floor space within Ascot centre dedicated to convenience shopping is approximately 1,190m².

4.14 The comparison shops offered account for a healthy 1,360 m² of floor space within the retail centre, according to G L Hearns 'Retail and Leisure Study' 2006 for RBWM.

4.15 Sunningdale - Like Ascot there is a strong presence of local and independent traders within Sunningdale district centre. Notable exceptions (national multiple retailers) include Pizza Express, Waitrose, The Carphone Warehouse and Lloyds Pharmacy.

4.16 Convenience stores within Sunningdale include Waitrose, Majestic Wine warehouse, an independent butchers amongst. According to the aforementioned 2006 Retail and Leisure study there is approximately 2,025m² floor space occupied by convenience stores in the retail centre.

4.17 Comparison goods and services stores account for most of the remaining retail units in Sunningdale, again aimed towards affluent local residents. Shops offered vary from interior designers to boutiques and cafés to beauty salons.

4.18 According to a town FOCUS report for Sunningdale there has been a steady increase in demand for retailer representation in the area. Table 3.3 shows historical retailer requirements for the centre.

Table 3.3: Historical No. of Retailers Wishing to be Represented in Sunningdale District Centre

Apr 05	9
Oct 04	7
Apr 04	3
Oct 03	3
Apr 03	4
Oct 02	4
Apr 02	2
Oct 01	0
Apr 01	1
Oct 00	1
Apr 00	1
Oct 99	0
Apr 99	0
Oct 98	0
Apr 98	1
Oct 97	0

(Source: Sunningdale Focus Report)

Shopping Rents

4.19 A property market report by FPD Savills research in September 2004 put local rents for Sunningdale at around £26-28 p. sq. ft, whilst Ascot faired slightly better at £30 p. sq. ft. The higher rents in Ascot reflect a bigger catchment and thus increased retail offering.

Vacancy Rates

4.20 Ascot - At the time of the last retail survey in February 2008 there was only one vacant property (see Table 3.1).

4.21 Sunningdale - During the last retail survey of Sunningdale in February 2008, there were two vacant units in the centre. This equates to a vacancy rate of 4%, which according to GOAD, is below the national average of 10.1% at June 2003 (see Table 3.2).

Commercial Yields

4.22 Due to the small size of Ascot and Sunningdale district retail centres, retail property transactions are scarce. As a result no data can be obtained on retail property yields for these areas.

Pedestrian Flows

4.23 Ascot - Due to the linear nature of the retail centre, and the predominance of retail facilities on the northern side of the High Street, this is where the highest pedestrian flows occur.

4.24 Sunningdale - Waitrose supermarket is a focus for pedestrian flows in Sunningdale, particularly to and from Sunningdale railway station. Since Sunningdale comprises two core areas of retail facilities separated by the railway line, there is a constant pedestrian flow between the centres. There are good footpaths on either side of the road, and electronic barriers at the railway crossing to maximise pedestrian safety.

4

Health Check of Ascot and Sunningdale District Centres

Accessibility

4.25 Ascot - There is one bus route serving the district centre, which stops at the Racecourse. Ascot train station is only a 10-minute walk away. However access to the district centre is predominately by privately owned cars.

4.26 There is ample off-street parking provided at three separate locations serving the high street. There are 80 spaces located to the rear of Budgens supermarket, 50 spaces in front of Hermitage Parade shops and 100 spaces located at the end of the High Street on the northern side. Furthermore a new car park has been created opposite the Racecourse that is accessible to the public. On-street parking is also available for high turnover along a significant part of the High Street and London Road.

4.27 For pedestrian safety there are wide pavements, plus zebra and pelican crossings to link both sides of the retail centre. However Ascot could benefit from an additional crossing to the east of the petrol station due to the traffic flow along the High Street.

4.28 Sunningdale - Accessibility to Sunningdale district centre is mainly via privately owned cars or on foot. The district centre is easily accessible from Sunningdale railway station and is also on a bus route (albeit infrequent). There are a number of on- and off-street parking facilities, the latter provided at the railway station (220 spaces), and Waitrose supermarket (150 spaces). There are a further 100 spaces serving the Chobham Road facilities, accessible from London Road.

Local Views

4.29 In an LDF-related public consultation held in Spring 2006, many respondents commented on the retail centres of the Borough. In relation to Ascot and Sunningdale the key issues were:

- These local districts need to be maintained and kept healthy to serve local needs.
- More convenience stores are needed to provide for the increasing population in this area.

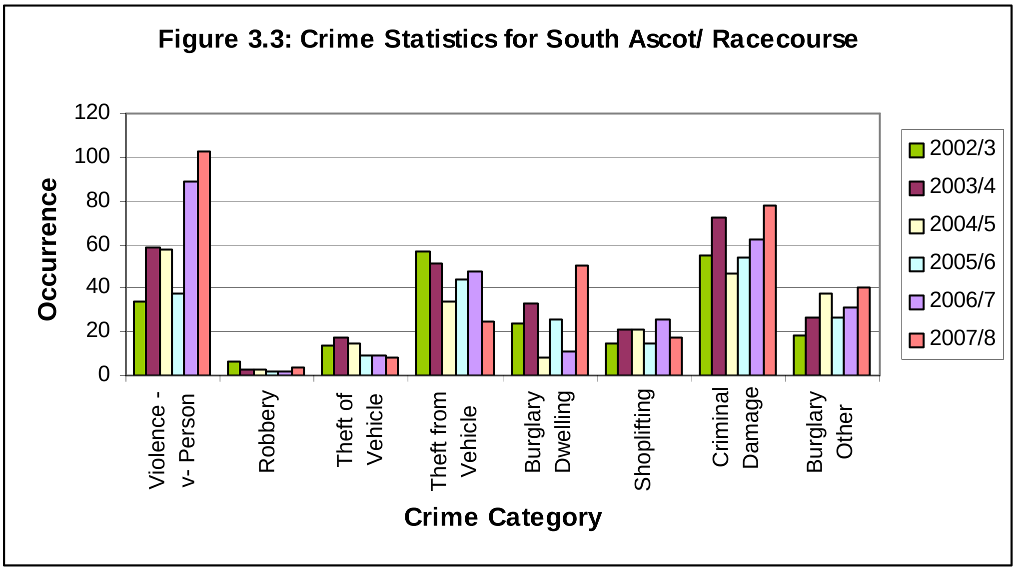
Perceptions of Safety and Crime

4.30 Ascot - There are four policing beat codes in Ascot: 1) Sunningdale; 2) Central Ascot/ Sunninghill/ Cheapside; 3) South Ascot/ Racecourse and 4) Blythewood. The South Ascot/ Racecourse beat incorporates Ascot High Street, the area of interest in this report.

Table 3.4: Crime Statistics For South Ascot/Racecourse

Crime Category	2002/3	2003/4	2004/5	2005/6	2006/7	2007/8
Violence -v- Person	34	59	58	38	89	103
Robbery	6	3	3	2	2	4
Theft of Vehicle	14	17	15	9	9	8
Theft from Vehicle	57	51	34	44	48	25
Burglary Dwelling	24	33	8	26	11	50
Shoplifting	15	21	21	15	26	17
Criminal Damage	55	72	47	54	62	78
Burglary Other	18	27	38	27	31	40

(Source: Thames Valley Police)



4.31 During the period of 2004/2005 all crime categories saw a decline from previous years, with the exception of shoplifting that remained static and burglary other, which had been rising steadily. In 2006/7 most crime categories remained around the same levels either decreasing or increasing slightly with the exception of violence against the person, which has increased dramatically from the previous year.

4.32 **Sunningdale**

4.33 The results for Sunningdale are varied; some categories show a decrease in occurrence, e.g. theft of vehicle, robbery and criminal damage, whilst in contrast Violence against the person has almost doubled in the last year. Theft of Vehicle occurrence has also increased significantly in the 2007/8 period, as have other burglary types.

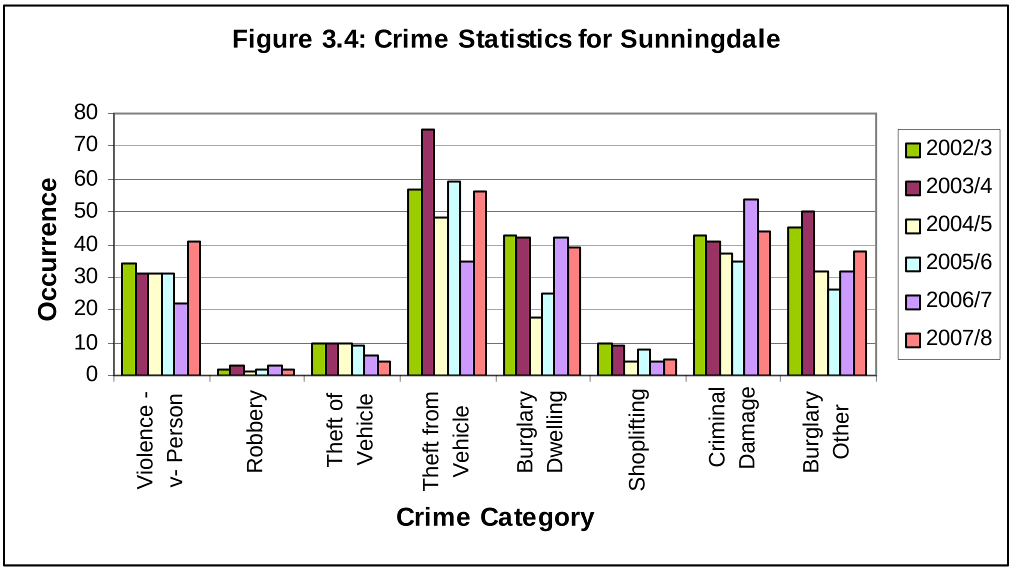
Table 3.5: Crime Statistics for Sunningdale

Crime Category	2002/3	2003/4	2004/5	2005/6	2006/7	2007/8
Violence -v- Person	34	31	31	31	22	41
Robbery	2	3	1	2	3	2
Theft of Vehicle	10	10	10	9	6	4
Theft from Vehicle	57	75	48	59	35	56
Burglary Dwelling	43	42	18	25	42	39
Shoplifting	10	9	4	8	4	5
Criminal Damage	43	41	37	35	54	44
Burglary Other	45	50	32	26	32	38

(Source: Thames Valley Police)

4

Health Check of Ascot and Sunningdale District Centres



4.34 Policing priorities for Ascot, Sunningdale and Sunninghill neighbourhood have been identified as burglary, anti-social behaviour and parking & speeding. Although there have been some rises in crime, overall levels are still relatively low, with the highest number of instances in any given category not exceeding 56 cases in 2007/8.

Environmental Quality

4.35 Ascot - Ascot has a high level of environmental quality, with the main High Street being clean and well maintained. It has raised planters running down the centre of the street. The only negative aspect is the volume of traffic in the area associated with race time. Despite this the centre lies adjacent to designated Green Belt, which creates a 'village' feel to the area and enhances the attractiveness of the High Street.

4.36 Sunningdale - The majority of Sunningdale's retail centre has a high environmental quality, but the heavy volumes of traffic on the A30 London Road separating the core retail areas detract from this.

4.37 The retail facilities within Sunningdale are well maintained and attractive. The centre is kept clean with planting and gardens makes it an attractive area, maintaining the 'village' feel of the area, often absent from larger towns.

Conclusions

4.38 Both Ascot and Sunningdale are similar in many ways providing a satisfactory range of convenience goods to serve the local needs of the residents. They also both offer prestigious independent comparison good stores aimed at an affluent community.

4.39 Ascot – The indicators based on PPS6 criteria have shown Ascot to be a vibrant town centre. There is a good range of retailers providing convenience, comparison and service stores for the local resident population. The upmarket quality of the retail representations indicates they serve the requirements of wealthy area. This is also reflected in the high physical quality of the centre.

4.40 The visual amenity of the centre is enhanced by a high standard of maintenance, but the high level of on-street parking, whilst making the area very accessible for the purposes of convenience, can detract from the environmental quality. The minimal vacant floor space also reinforces the present health of the centre.

4.41 Sunningdale – This is a vibrant retail centre, which provides a good range of shopping facilities that fulfils the needs of the local population. The high quality services and the retail profile reflect the affluence in this area, not dissimilar to Ascot.

4.42 The centre is attractive and well maintained, however its vitality is hindered by its disjointed nature and the heavy congestion experienced down the A30 London Road, especially at peak times. The low vacancy rate indicates that Sunningdale is a healthy and popular local centre that sufficiently meets the day-to-day requirements of its local community, whilst also offering facilities to a wider market.

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