Royal Borough of
Windsor and Maidenhead

Retail Health Check

May 2010

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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 4 (PPS4): Planning for Sustainable Economic Growth[1]. Also 'The South East Plan – Regional Spatial Strategy for the South East (2009)' states that Local Planning Authorities should carry out regular assessments of town centres (Policy TM1).

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

- Diversity of main town centre uses;
- Retailer representations and intentions to change;
- 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 visitors. Indeed the South East Plan has identified Windsor as a 'priority area for tourism' under policy TSR7. 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 its topography, accessibility can still be an issue for shoppers with mobility difficulties.

Recent developments in Windsor include the recently finished Waitrose development within the King Edward Court shopping centre and the closure of the Caleys department store, (currently being converted into a new hotel and retail units – one unit now trading).

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 town centres within the Royal Borough are non comparable. Maidenhead retail centre is relatively healthy with a good level of multiple representations, moderate yields and strong rents. The town centre is easily accessible by car and is served by good public transport links.

Recent developments in Maidenhead include the development at King Street/ Grenfell Island (an Odeon Cinema, restaurants and bars, and David Lloyd Leisure) and the Sainsbury's redevelopment. 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.

The need for a coordinated approach to town centre regeneration led to the preparation of the document 'A Vision for Maidenhead Town Centre' (January 2009)[2]. This has been drawn up with key partner organisations to establish an overarching strategy for the town

[1] The government published PPS4: Planning for Sustainable Economic Growth on 29th December 2009. Policy EC9 requires that local planning authorities keep under review the vitality and viability of their town centres. This involves monitoring the health of town centres over time by collecting data on listed key indicators. PPS4 supersedes the previous PPS6: Planning for Town Centres, which has subsequently been cancelled.

[2] http://www.rbwm.gov.uk/web/prom_vision.htm

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centre and to provide the basis for the development of the town over the next 20 years. The document highlights five priority projects which will be the key to regeneration and revitalisation of the town centre over the medium to longer term.

Cabinet adopted the 'Vision' for Maidenhead Town Centre as a strategy for the town centre in January 2009. This has since led to the preparation of a draft Area Action Plan (AAP)[3] as part of the formal Local Development Framework process. Consultation on the AAP was carried out in January/ February 2010. Further studies have been conducted to support this work, including a 'Retail Study', 'Public Realm Strategy' and 'Transport Modelling'[4]. Further consultation on the AAP, to produce a final version for Government examination, will be carried out during 2010.

This report should be viewed in the context of the impact of surrounding retail areas and new developments occurring in these centres. In the case of comparison goods Windsor Town Centre retains 15.4% of its catchment expenditure, whereas Maidenhead Town Centre only retains 9.9% of its total catchment area expenditure, indicating many local residents choose to shop elsewhere[5].

Planned retail developments are expected to impact on Windsor and Maidenhead, for example the proposed Bracknell Eye could result in a 7% loss of trade from Windsor and a 3% loss from Maidenhead owing to proximity[6]. Further, the 'Heart of Slough' proposal to regenerate 11.75ha of land in the town centre[7] (work has already commenced), and the recent opening of High Wycombe's Eden Centre is likely to have attracted some spending, particularly from Maidenhead's catchment.

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 and intentions to change;
- Vacancy;
- Pedestrian Flows;
- Accessibility;
- Local views;
- Perception of safety and the occurrence of crime;
- Environmental Quality.

Ascot is a busy 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 a 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 centre are its disjointed nature (there is a level crossing) and the heavy traffic experienced along the A30 London Road.

Although the UK recession officially ended in quarter 4 of 2009, the growth margin was very small (0.1%). The fall in GDP over 6 consecutive quarters made the recession one of

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[3] http://www.rbwm.gov.uk/web/pp_lds.htm

[4] The timeframe for the production of the AAP is set out in the Council's Local Development Scheme http://www.rbwm.gov.uk/web/pp_lds.htm

[5] Windsor and Maidenhead Retail Capacity Update 2009

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

[7] http://www.slough.gov.uk/services/16968.aspx

the longest and most severe on record. Consequently recovery of town centres and the retail industry is expected to be slow[8]. This report should be read in light of these factors.

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

8 Colliers CRE National Retail Barometer (Retail Voids) Winter 2010 Report.

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Glossary

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.
Sui Generis	Not covered by a use class – in a class of their own.
Accessibility	Ease and convenience of access by a choice of means of travel, including – the quality, quantity and type of car parking; the frequency and quality of public transport services and the range of customer origins served; and, the quality of provision for pedestrians, cyclists and disabled people and the ease of access from main arrival points to the main attractions.
Catchment Area	The surrounding area that a shop or retail centre serves.
Commercial Yield	Demonstrates the confidence of investors in the long-term profitability of the centre for retail, office and other commercial developments, based on the capital value of the property in relation to the rental return. This indicator should be used with care since yield on its own is of less value than in comparison with other yields at different points in time and in different locations.
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.
Designated Public Places Order (Alcohol Consumption) 2009	The Royal Borough has recently reviewed its ‘Designated Public Places Order (Alcohol Consumption) 2009’ to combat anti-social behaviour associated with alcohol. There are 111 areas in the Borough where there are now restrictions on public drinking. Refusal to comply with an Officer’s request to refrain from drinking can result in fines of up to £500.
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 variety of units used for different functions e.g. shopping, services, restaurants etc.

Environmental Quality	A set of properties and characteristics that relate to the natural and built environment. Should include views and information on problems (such as air pollution, noise, clutter, litter and graffiti) and positive factors (such as trees, landscaping and open spaces).
Footfall	A key indicator of vitality of shopping streets, measured by the numbers and movement of people on the streets, in different parts of the centre at different times of the day and evening, who are available for businesses to attract into shops, restaurants or other facilities.
Local Development Framework (LDF)	A number of documents which together form the spatial strategy for development and land use.
Local Plan	A Borough-wide planning document setting out policies for development and the use of land. It will be replaced by the Local Development Framework.
National Multiple	A retail or service operator which is part of a network of nine or more outlets.
Planning Policy Statement (PPS)	A series of statements issued by the Government, setting out the policy guidance on different aspects of planning.
Primary Shopping Area	An area where retail development is concentrated as defined on the Local Plan proposals maps.
PRoM	Partnership for the Rejuvenation of Maidenhead. PRoM is a cross-party group created by the council with an independent chairman charged with finding agreed solutions for town centre regeneration, including the creation of a vision and Masterplan and a strategy for achieving it. It will make recommendations to the Royal Borough's cabinet. With a majority of lay members, PRoM represents a wide cross-section of interests in the town. Also contributing are council officers with relevant expertise, such as transport and planning.
Retailer Representation (and intentions to change)	Existence and changes in representation of types of retailer and the demand of retailers wanting to come into the centre.
Tourists	People who travel to and stay in places outside their usual environment, for leisure, business and other purposes. Tourism refers to all activities of visitors including 'over-night visitors' and 'same-day visitors' (World Tourism Organisation).
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 which provide a broad range of facilities and services and which fulfil a function as a focus for both the community and public transport. It excludes retail parks, neighbourhood centres and small parades of shops of purely local significance.

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Services	In this report services comprise of non-retail outlets e.g. banks, hairdressing and beauty salons, cafés, restaurants, pubs.
South East Plan	A plan produced by the South East England Regional Assembly, which forms the Regional Spatial Strategy for the area.
Vacant Outlets	For this report vacant is defined as a unit that is currently empty and available for immediate let.
Viability	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.
Vitality	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 Introduction

1.1 This is the 2009/10 annual review of retail health within the Royal Borough, based on the guidance in Planning Policy Statement 4 (PPS4): Planning for Sustainable Economic Growth. It states 'comprehensive, relevant and up-to-date monitoring is essential to the effective planning and management of town centres'. The approved South East Plan – Regional Spatial Strategy for the South East (May 2009) defines both Windsor and Maidenhead as secondary regional centres[9]. Maidenhead is also identified as a second tier Sub-regional hub[10]. The closest primary centres to the Borough are Reading, High Wycombe, Slough and Woking. The nearest of the secondary centres to the Borough are Camberley, Bracknell and Staines. The Local Plan also identifies the following service centres:

- District Centres – Ascot and Sunningdale; and
- Local Centres and Parades e.g. Cookham Rise, Sunninghill.

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 PPS4 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[11];
- Perception of safety and occurrence of crime[12];
- 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 (e.g. Colliers CRE), information from Experian GOAD, G L Hearn's Retail and Leisure Study and Windsor and Maidenhead Retail Capacity Update (2009).

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[9] Based on Policy TC1 of the South East Plan
[10] Based on Policy WC BV1 of the South East Plan.
[11] Borough wide information on residents views can be found in the RBWM Place Survey (annual publication).
[12] 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. Indeed the South East Plan has identified Windsor as a 'priority area for tourism' under policy TSR7. 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 Incorporating Alterations adopted June 2003.

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, connecting with the Royal Windsor Shopping (in the refurbished Victorian Central railway station).

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 offers a proportionately 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 by 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 2010 (see Table 1).

Table 1: Use Class Breakdown in Windsor Town Centre at February 2010

Use Class	2006	2007	2008	2009	2010
A1	265	260	255	252	244
A2	28	28	27	27	26
A3	60	62	63	65	66
A4	14	14	14	14	13
A5	5	5	4	4	4
Sui Generis	-	-	-	-	6
Other	11	8	9	10	6
Total	**383**	**377**	**372**	**372**	**365**

(Source: RBWM Retail Surveys)

2.6 The decrease in the net number of units since the February 2009 survey is the result of: redevelopment schemes involving 5 units at Daniels and King Edward Court, amalgamation of 4 units (Zizzi, Berrys of Windsor, Phase Eight and Cocoa Bean) and addition of new units (2 – Caleys redevelopment). The survey has also been altered to separate 'Sui Generis' from 'Other'.

2.7 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: http://www.rbwm.gov.uk/web/pp_facts_and_figures_retail_health_checks.htm. These are normally updated every six months during February and September.

2.8 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. Whilst independent retailers may benefit from this increase in potential customers, multiple nationals present 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.

2.9 Composition is determined by whether a shop sells items bought on an irregular basis (comparison), essential everyday items (convenience), provides a service or is miscellaneous (see Table 2 and Figure 1). The opening of Windsor Royal Shopping area (located in the refurbished Victorian Central railway station) in 1997 has contributed to the ability of Windsor to offer an up-market shopping experience that sets it apart from other retail centres.

2.10 The comparison goods floorspace in Windsor Town Centre is estimated to be 36,216m^2 (this is based on the most recent Experian Goad surveys, with net comparison goods sales areas in the main food stores added)[13].

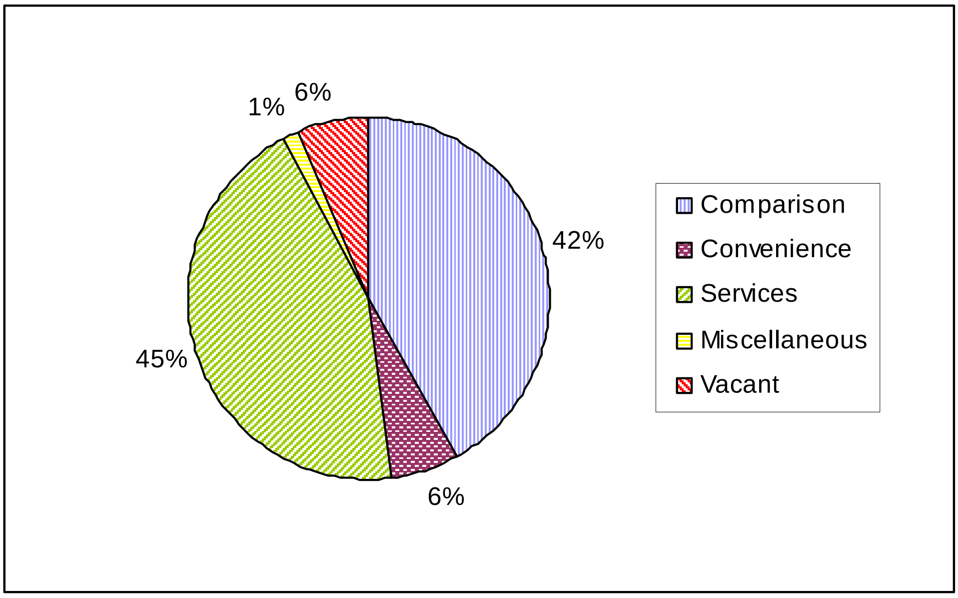
Table 2: Composition of Uses in Windsor Town Centre at February 2010

Type of Use	Number of Units Surveyed	Percentage of Overall Units
Comparison	151	42%
Convenience	22	6%
Services	160	45%
Miscellaneous	5	1%
Vacant	23	6%
Total:	**368**	**100%**

(Source: RBWM Retail Surveys)

[13] Windsor and Maidenhead Retail Capacity Update 2009

Figure 1: Composition of Uses in Windsor Town Centre February 2010



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

Retailer Representations and Intentions to Change

2.11 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 peripheral 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 visitors; these are particularly evident near the Castle along Thames Street and around Guildhall Island.

2.12 'National Multiple' outlets represented in Windsor include Next, New Look, Marks and Spencer, W H Smith, Boots, Waitrose (1,976m^2 – net convenience floorspace) and Superdrug, among others.

2.13 'Up-market' retailers include Crabtree and Evelyn, Hobbs Ladieswear and Jaeger.

2.14 John Lewis withdrew from Windsor in June 2006, however planning permission[14] has been granted on the site for the creation of three new retail units with a hotel above. This work is currently under-construction, with one of the retail units open with TK Maxx trading.

2.15 Despite the loss of John Lewis' representation there has generally been an increase in demand for floorspace from other retailers in Windsor, demonstrated by the retailers now represented in the new King Edward Court Development. However demand has fluctuated over the years reflecting national trends e.g. the loss of Woolworths has affected town centres across the country. Windsor's Town Centre Manager considers that there is also a requirement in the town for stores selling small and large white electrical goods, gardening equipment, video rental and sports equipment.

Table 3: Number of Retailers Wishing to be Represented in Windsor Town Centre

Year	Number	Source of Data
Apr 97	46	FOCUS
Oct 97	58	FOCUS
Apr 98	64	FOCUS

[14] Planning application reference: 07/01660

Oct 98	57	FOCUS
Apr 99	59	FOCUS
Oct 99	61	FOCUS
Apr 00	72	FOCUS
Oct 00	86	FOCUS
Apr 01	87	FOCUS
Oct 01	74	FOCUS
Apr 02	86	FOCUS
Oct 02	94	FOCUS
Apr 03	83	FOCUS
Oct 03	85	FOCUS
Apr 04	75	FOCUS
Oct 04	77	FOCUS
Apr 05	88	FOCUS
Jul 09	73	EGi[15]
Mar 10	75	EGi

2.16 Using published EGi[16] data it is possible to gain an indication of retailer requirements for any given town centre. Whilst this information has inherent accuracy issues e.g. retailers put out a requirement for a unit in any town in the South East rather than a requirement for a specific town, useful trends can be drawn. A change in the source of data used means that direct comparison with previous years cannot be assured, but available information would seem to reflect the current market (see Table 3).

Shopping Rents

2.17 Colliers CRE 'In Town Retail Rents' research paper provides rates from 2000 to 2009 for more than 600 open market Zone A shopping locations in the UK. Table 4 highlights the rental levels for Windsor over this period compared to neighbouring town centres.

Table 4: Comparative Zone A Rental Levels (£/square metre)

Centre	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Reading	2153	2422	2422	2422	2476	2476	2476	2583	2583	2691
Windsor	**1346**	**1399**	**1399**	**1399**	**1399**	**1453**	**1722**	**1776**	**1776**	**1561**
Slough	1184	1076	1023	1076	1076	1130	1130	1130	1130	753
Maidenhead	1023	1023	1076	1076	1076	1184	1184	1184	1184	969
Bracknell	969	861	969	969	1184	1184	1184	1238	1238	915
High Wycombe	807	861	915	915	915	969	969	969	1399	1076

(Source: Colliers CRE 'In Town Retail Rents; converted from square feet using 0.0929)

2.18 Rental levels for Windsor have risen since 2000, indicating a healthy centre that is increasingly in demand. Indeed according to a Colliers CRE 'In Town Retail Rents' (February 2010), Windsor rents are £1561 psm. Although this is a decrease since last year, this reflects the current economic climate and is a pattern common to almost all neighbouring centres. When compared to neighbouring centres Windsor is the second most expensive, demonstrating it is a desirable location for retailer representation.

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[15] Requirements are calculated by adding together those for live (i.e. not satisfied) requirements 'In Town' and 'Shopping Centre' locations for the town. Non-specific nationwide entries are also excluded.

[16] EGi is the online property information service of the Estates Gazette Group.

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Vacancy Rates

2.19 Table 5 shows vacancy rates collated from data collected during biannual retail surveys for Windsor.

Table 5: Vacancy Rates in Windsor Town Centre

Date of Survey	Vacancy Rate
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%
Sep. 2008	4.0%
Feb. 2009	6.7%
Sep. 2009	6.5%
Feb. 2010	6.3%

(Source RBWM Retail Surveys)

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

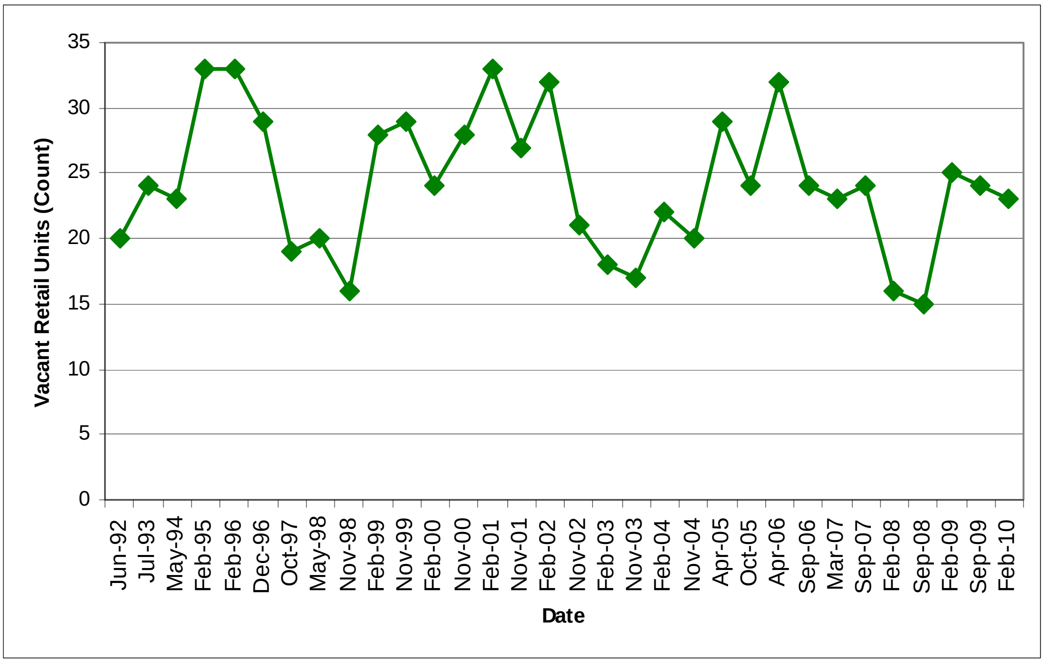
2.20 In the most recent retail survey of Windsor (February 2010) there were 23 vacant properties (6.3%), a decrease since early 2009, and well below the national average rate of 12.4%[17] (Colliers CRE state 14.4% nationally in October 2009)[18].

2.21 Historically Windsor has had a relatively low vacancy rate compared to Maidenhead. Although 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 5/ Figure 2).

[17] http://www.shopping-centre.co.uk/news/fullstory.php/aid/3355/Vacancy_rates_still_in_decline_but_at_a_slower_rate.html - 25th February 2010

[18] Colliers CRE 'Central London Retail Health Check Spring 2010'

Figure 2: Historical Retail Vacancy in Windsor Town Centre



(Source: RBWM Retail Surveys)

Commercial Yields

2.22 Commercial yields can be an indicator of investor confidence and profitability of an investment, and can also reflect 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, 2009).

2.23 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 an initial later 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.

2.24 Table 6 is taken from the July 2008 Property Market Report published by the Valuation Office showing time series data on retail property yields for Windsor from Spring 2001 to Summer 2008.

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Table 6: Retail Property Yields

Date	Slough	Reading	Maidenhead	Windsor	Bracknell
Apr 01	6.75	6.50	6.25	5.75	7.00
Oct 01	7.00	6.50	6.25	6.00	7.00
Apr 02	8.00	6.50	6.25	6.75	7.00
Oct 02	8.00	6.50	6.25	6.75	7.00
Apr 03	7.25	6.50	6.25	6.25	7.00
Jan 04	6.50	6.50	7.00	6.25	7.00
Jul 04	6.50	6.50	7.00	6.25	7.00
Jan 05	6.50	6.50	7.50	5.50	7.00
Jul 05	5.50	5.50	6.50	4.75	6.50
Jan 06	4.50	4.50	6.00	4.25	6.00
Jul 06	4.50	4.50	6.00	4.25	6.00
Jan 07	4.50	4.50	5.25	4.25	6.00
Jul 07	4.50	4.25	5.25	4.25	6.00
Jan 08	4.50	4.50	5.25	4.25	6.00
Jul 08	4.75	4.75	5.75	4.50	6.00

(Source: The Valuation Office)

2.25 For the last seven years, retail property yields for Windsor have fluctuated but generally 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

2.26 Most retail outlets are located along busy pedestrian routes, as it provides them with the most profitability, thus pedestrian footfall counts are a useful retail health check. In the past annual footfall surveys for Windsor have been undertaken by PMRS in October each year, the most recent survey being on Friday 3rd and Saturday 4th October 2008. The footfall is recorded at 30 sites. Unfortunately it was not possible to continue this data series in 2009, but we will be looking at future ways of obtaining information.

2.27 The cordon pedestrian counts were conducted weekdays from 7am – 7pm in September each year. They represent complete cordons around the town centre, and although each site was surveyed on a single day, the counts were spread over a number of days to minimise the impacts of day-to-day variability. Weather conditions were selected to be as consistent as possible. Figure 3 shows the distribution of footfall over a 12 hour period for pedestrians heading into Windsor town centre[19].

2.28 Past average annual pedestrian counts for Windsor since 1996 can be seen in Table 7 and Figure 4. 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 could explain periods of lower pedestrian numbers in Windsor[20]. (Please contact the Planning Policy Unit for further information on footfall counts).

[19] It should be noted that this data is intended to monitor commuter patterns and therefore shows routes that allow access in and out of the town centre, rather than thoroughfares in town.

[20] 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.

Figure 3: Inbound Pedestrians in Windsor (12-hour period)

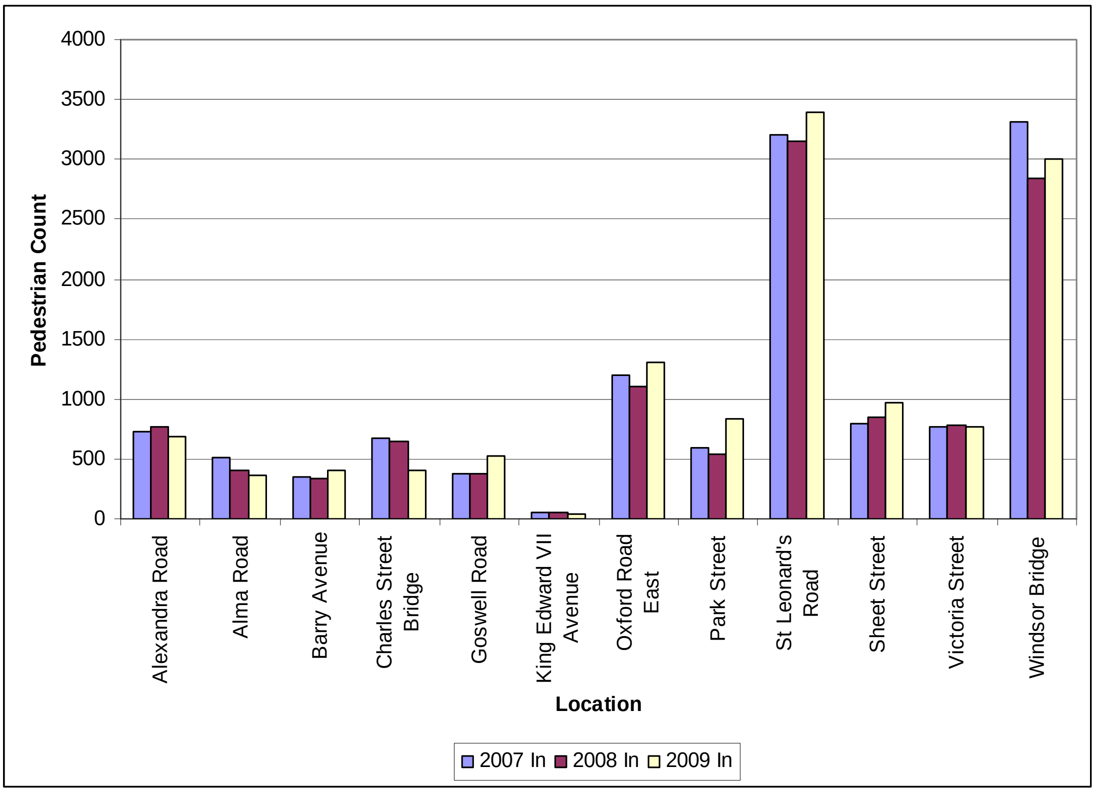


Table 7: Average Footfall in Windsor

Year	Average Count (In Thousands)
1996	41.10
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
2008	34.96

(Source: PMRS Footfall Surveys)

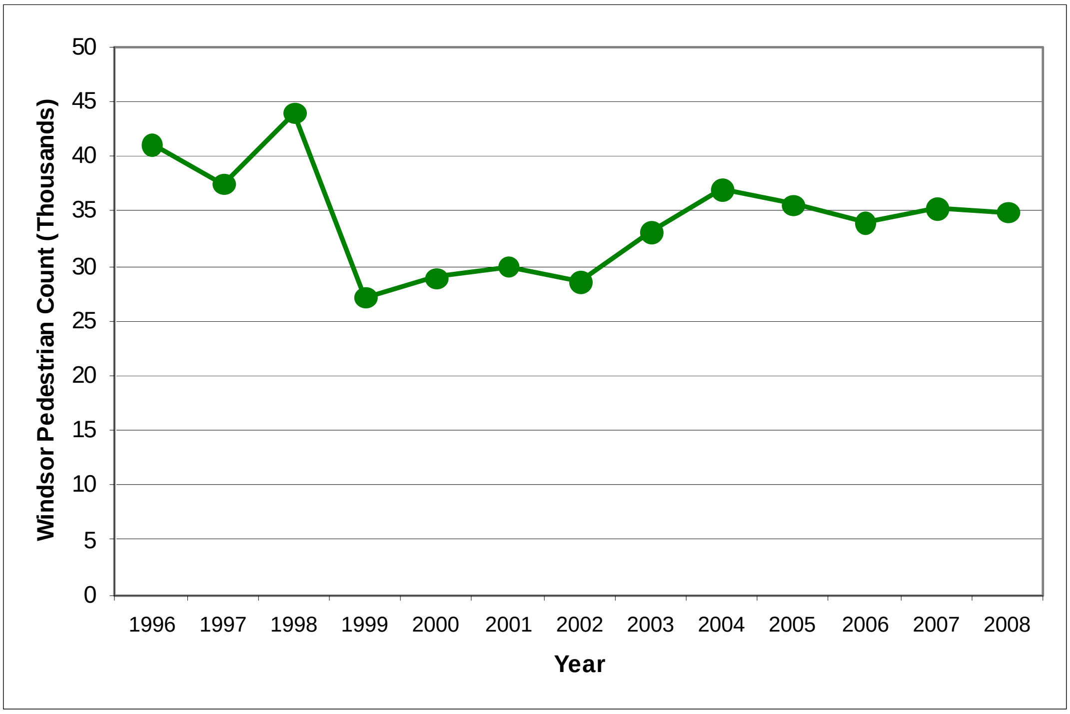
2.29 Between 1996 and 1998 the highest footfall count was outside Marks and Spencer located towards the top of Peascod Street. In following years, the highest footfalls have been outside Boots in King Edward Court and outside Lloyds TSB on Thames Street. The footfall figures for 2008 follow the trend of the highest counts being consistently found along Peascod Street, in King Edward 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 led to a more varied circulation pattern of pedestrians.

2

Windsor Town Centre Health Check

2.30 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 2008 are consistent with these findings from previous years.

Figure 4: Windsor Pedestrian Footfall Since 1996



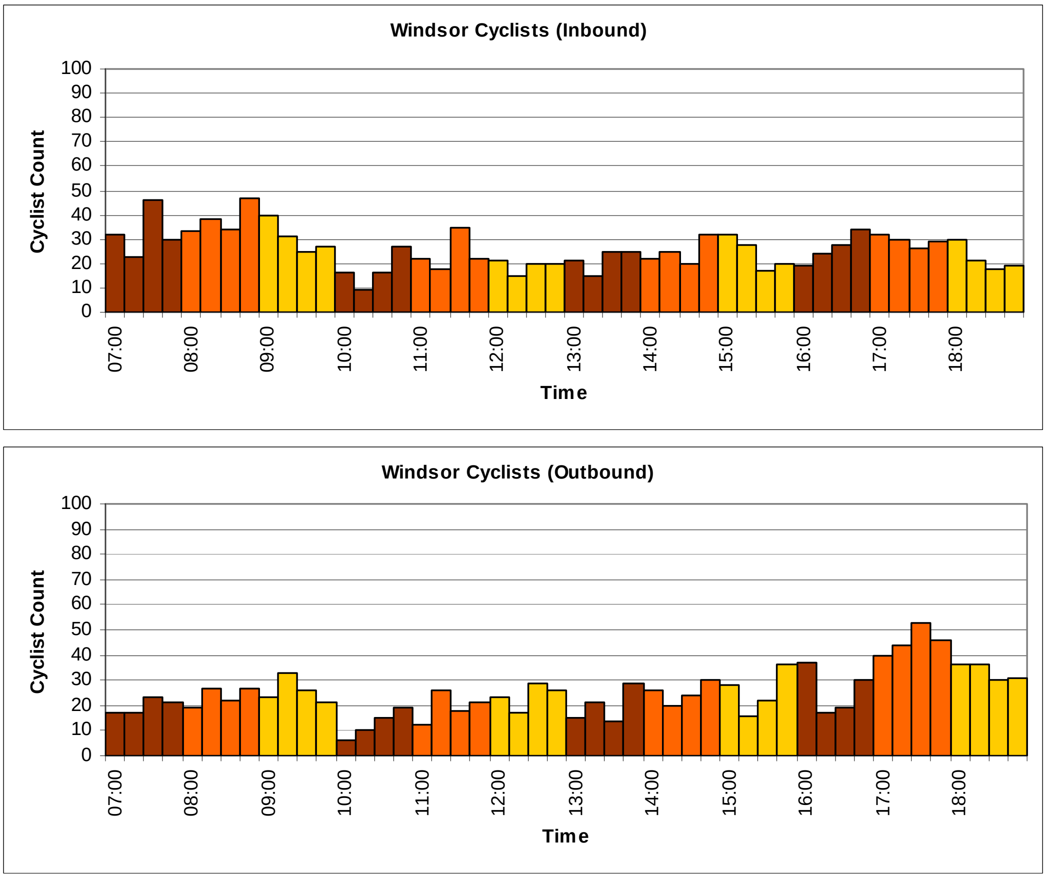
Cyclist Counts

2.31 Cyclist counts were conducted weekdays from 7am–7pm in September 2009. 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.

2.32 The peak flows follow commuter times, showing high counts in the mornings at 8 – 9am inbound and 5-6pm outbound (see the graphs in Figure 5). Interestingly an increased number of cyclists can be seen at around 3pm.

2.33 The cyclist counts provide a useful indication of how people access Windsor town centre. The highest count at any given time was 53 (outbound), but a pedestrian count (see figure 3) confirms that high numbers of people are in the town at the same time.

Figure 5: Cyclist Counts in Windsor



(Source: RBWM Transport Surveys)

Accessibility

2.34 A large percentage of Windsor retail centre is pedestrianised, including Peascod Street, King Edward Court and Windsor Royal Station. The nature of the town presents some inherent problems common to many historical towns. The Castle is on a steep hill; consequently some of the shops, restaurants and hotels are less accessible to wheelchair users because of their historic nature[21].

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

- Windsor and Eton Central offers a direct link to Slough, whence it is possible to connect to London Paddington, Maidenhead and the west via the Great Western Mainline.
- Windsor and Eton Riverside links to London Waterloo station (this journey takes about 1hr).

2.36 Windsor coach park is located near Windsor and Eton Central Station, adjacent to Alexandra Gardens. This caters for the large numbers of domestic and foreign visitors who arrive in the town by coach.

2.37 Given that much of Windsor retail centre is pedestrianised (with the exception of the stop in the central section of Peascod Street), bus stops are generally located on the periphery around Victoria Street, High Street and Thames Street. Passengers benefit from real time bus information being provided at many of the central bus stops. There

21 http://www.windsor.gov.uk/site/visitor-information/travelling-with-a-disability

are regular bus services to: Ascot, Bracknell, Maidenhead, Old Windsor, Staines, Heathrow Airport, as well as coach services to London. Connections via Eton provide links to communities north of the Thames.

2.38 There are currently two Park and Ride schemes serving the town centre, operating from Home Park Car Park, and from Legoland Windsor. As part of the Windsor Transport and Parking Scheme, enhancements to the Home Park site are being proposed, together with a new weekend operation at Centrica and a 7-day operation from Windsor Racecourse. Enhancements to the Legoland Park and Ride are being sought in connection with the proposed hotel development at the theme park.

2.39 Despite the centre 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 8).

Table 8: Car Parking Available in Windsor (Prices at March 2010)

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	-
Windsor 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*

2.40 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 around the town centre.

Public Perceptions

2.41 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.

2.42 The Council is committed to preparing both a Core Strategy DPD as well as a Delivery & Development Principles DPD as part of the LDF. The results of an options consultation on these documents (Spring 2009) are broadly consistent with those found in earlier consultations. The results of the consultation will feed into the preparation of both the Core Strategy and the Delivery & Development Principles DPDs.

Perception of Safety & Occurrence of Crime

2.43 This information covers a twelve-month period for each crime year, which starts in April and ends in March[22].

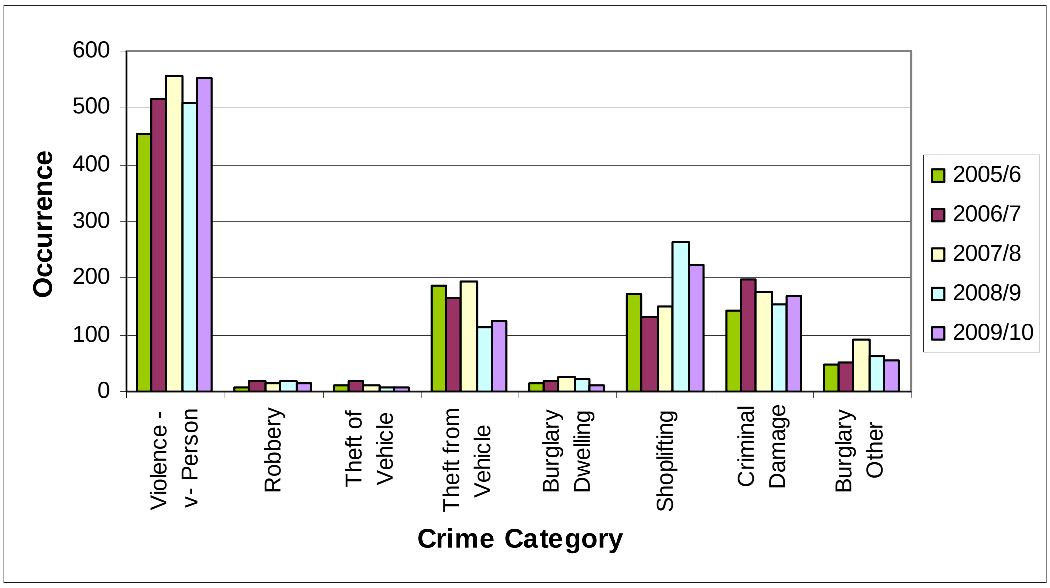
2.44 The statistics are reviewed over time rather than against other areas within the Royal Borough because all the centres are considered to have their own unique character. This data is from both day and night, and therefore may not be a true reflection of crime issues during retail hours.

2.45 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 during both day and night uses (see Table 9/ Figure 6).

Table 9: Crime Statistics for Windsor

Crime Category	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10
Violence -v- Person	186	242	302	454	516	557	509	554
Robbery	12	7	19	8	19	16	19	14
Theft of Vehicle	17	22	17	11	19	12	9	8
Theft from Vehicle	241	199	142	187	165	194	114	124
Burglary Dwelling	19	13	9	13	20	26	22	12
Shoplifting	175	189	151	171	131	151	265	225
Criminal Damage	137	135	146	144	199	176	155	169
Burglary Other	87	99	70	49	51	91	64	56

Figure 6: Crime Statistics for Windsor



(Source: Thames Valley Police)

2.46 The majority of crime categories have shown a decrease since 2002 or remained relatively static with the exception of violence against the person. This has risen from 186 in 2002/3 to a peak of 577 in 2007/8, seeing a decrease in 2008/9, and an increase in 2009/10. Robbery, theft of vehicle, shoplifting, burglary from the dwelling and burglary (other), have all seen a decrease in occurrence in the last year. (For more information please contact Thames Valley Police)[23].

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[22] The statistics for Windsor and Maidenhead have been sourced from Thames Valley Enterprise Information System – this system gathers data for management information and performance indicators.
[23] http://www.thamesvalley.police.uk/

Windsor Town Centre Health Check

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

Environmental Quality

2.48 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 River Thames and public open spaces such as Bachelor's Acre and Alexandra Gardens also assist in making this a pleasant shopping area.

2.49 The pedestrianised area of Peascod Street, coupled with good quality street furniture and level surfaces, enhances the retail experience of Windsor. There is also a low level of graffiti and litter. It is therefore considered that all these factors contribute to making Windsor a highly attractive town centre.

2.50 To combat anti-social behaviour associated with alcohol, Inner Windsor was designated under the 'Public Places Order (Alcohol Consumption) 2009', which restricts public drinking (see glossary for further information).

2.51 Windsor and Eton together was voted the top town in the UK in the 2008/09 national Clean Britain Awards (the scheme is held on a two year cycle)[24]. The five star gold award reflects the Royal Borough's concentrated efforts to keep local streets clean and tidy through determined campaigns such as zero tolerance on littering, de-cluttering of unnecessary signage, free Stubbi pouches for cigarette butts, abandoned shopping trolley retrieval and fast action against graffiti.

Conclusion

2.52 Using the PPS4 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 relatively low vacancy rate which is half that of the current national rate (at February 2010).

2.53 The character and nature of Windsor is different from other 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.

[24] http://www.cleanbritainawards.co.uk/

3 Maidenhead Town Centre Health Check

Form and Function

3.1 Maidenhead has a local catchment area and is classified as a secondary regional centre under policy TC1 in the South East Plan (2009). 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 Centre
Inner Secondary Shopping Area:	Queen Street North High Street East Market Street St Mary's Walk King Street North High Street West (West of Post Office)
Outer Secondary Shopping Area:	King Street South The Colonnade Bridge Street Queen Street South Providence Place Bridge Avenue St. Ives Road

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 areas 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 three additional units in the outer secondary shopping area – one on St. Ives Road, one in Brock Lane and the other on Nicholsons Lane.

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 2010.

Table 10: Use Classes in Maidenhead Town Centre at February 2010

Use Class	2006	2007	2008	2009	2010
A1	206	202	205	206	209
A2	41	38	42	42	41
A3	34	31	32	33	36
A4	13	13	13	12	12
A5	10	12	14	16	13
Sui Generis	-	-	-	-	11
Other	13	19	21	20	9
Total	**317**	**315**	**327**	**329**	**331**

(Source: RBWM Retail Surveys)

3.4 Since the 2009 survey there has been an increase of two units. Four additional units have been added to the survey: One unit along St Ives Road, two in Brock Lane and the other on Nicholsons Lane. However there were also two units that were amalgamated: one along Queen Street and one on Bridge Avenue (i.e. loss of two units overall).

3.5 The retail survey has also been amended to distinguish between Sui Generis uses and 'other', the former accounting for over 50% of the previous singular classification.

3 Maidenhead Town Centre Health Check

3.6 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, although there has been some re-classification this year resulting in an apparent increase in the number of comparison units and a decrease in convenience units. Even accounting for Maidenhead centre being smaller than Windsor, it still has proportionately fewer comparison shops. Comparison stores are located mainly in the primary shopping areas along the High Street and in the Nicholsons Centre. The total comparison goods floorspace for Maidenhead Town Centre is estimated to be 22,820m^2 (this is based on the most recent Experian Goad surveys, with net comparison goods sales areas in the main food stores added)[25].

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

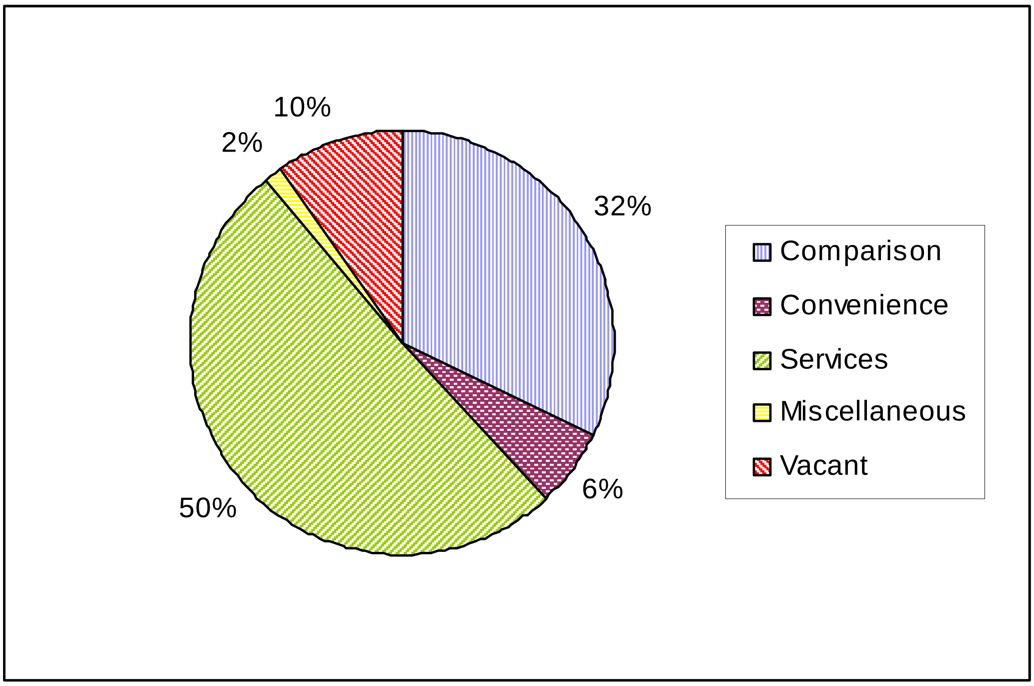
Table 11: Composition of Uses in Maidenhead Town Centre, February 2010

Type of Use	Number of Units Surveyed	Percentage of Overall Units
Comparison	106	32%
Convenience	19	6%
Services	167	50%
Miscellaneous	5	2%
Vacant	32	10%
Total:	**329**	**100%**

(Source RBWM Retail Surveys)

NB. Totals for use class and composition have a discrepancy of 2 units, since composition assesses retail units, not retail frontage. (Boots and Ernest Jones have active frontages on two streets).

Figure 7: Composition of Uses in Maidenhead Town Centre



(Source: RBWM Retail Surveys)

Retailer Representations and Intentions to Change

3.8 There are a good number of multiples represented within Maidenhead town centre including: Next, Top Shop, Boots, Tesco Metro (1,437m^2), Sainsbury's (4,383m^2),

[25] Windsor and Maidenhead Retail Capacity Update 2009

Waitrose (2,347m^2), Peacocks, Marks and Spencer (1,073m^2), W H Smith, Argos and New Look[26]. Wilkinson has recently opened along the High Street in the former Woolworths store (January 2010). However there is public demand for a department store (see public perceptions section).

3.9 Using published EGi[27] data it is possible to gain an indication of retailer requirements for any given town centre. Whilst this information has inherent accuracy issues e.g. retailers put out a requirement for a unit in any town in the South East rather than a requirement for a specific town, useful trends can be drawn.

3.10 A hindrance 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 Nation and a David Lloyd Health Club, but no larger units. ING Real Estate still has 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[28] (see the 'Looking to the Future' section for more information).

3.11 Table 12 shows the demand for retail representation in Maidenhead since 1997. A change in the source of the data used means that direct comparison with previous years cannot be assured, but a downward trend would seem to reflect the current market.

Table 12: No. of Retailers Wishing to be Represented in Maidenhead Town Centre

Year	Number of Requirements	Source of Data
Apr 97	43	FOCUS
Oct 97	51	FOCUS
Apr 98	52	FOCUS
Oct 98	48	FOCUS
Apr 99	54	FOCUS
Oct 99	46	FOCUS
Apr 00	58	FOCUS
Oct 00	58	FOCUS
Apr 01	71	FOCUS
Oct 01	63	FOCUS
Apr 02	75	FOCUS
Oct 02	82	FOCUS
Apr 03	83	FOCUS
Oct 03	88	FOCUS
Apr 04	76	FOCUS
Oct 04	70	FOCUS
Apr 05	67	FOCUS
Jul 09	33	EGi[29]
Mar 10	42	EGi

26 Floorspaces are for main food and convenience stores, taken from the Retail Capacity Update 2009
27 EGi is the online property information service of the Estates Gazette Group.
28 Source: http://www.rbwm.gov.uk/web/news_40107_maidenhead_rejuvenation.htm and http://www.rbwm.gov.uk/web/pp_broadway_king_street_queen_street_triangle_spd.htm
29 Requirements are calculated by adding together those for live (i.e. not satisfied) requirements 'In Town' and 'Shopping Centre' locations for the town. Non-specific nationwide entries are also excluded.

Maidenhead Town Centre Health Check

Shopping Rents

3.12 Colliers CRE ‘In Town Retail Rents’ research paper provides retail rental rates from 2000 to 2009 for more than 600 open market Zone A shopping locations in the UK (February 2010). Table 13 highlights the rental levels for Maidenhead over this period compared to neighbouring town centres.

Table 13: Comparative Zone A Rental Levels (£/square metre)

Centre	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Reading	2153	2422	2422	2422	2476	2476	2476	2583	2583	2691
Windsor	1346	1399	1399	1399	1399	1453	1722	1776	1776	1561
Slough	1184	1076	1023	1076	1076	1130	1130	1130	1130	753
Maidenhead	1023	1023	1076	1076	1076	1184	1184	1184	1184	969
Bracknell	969	861	969	969	1184	1184	1184	1238	1238	915
High Wycombe	807	861	915	915	915	969	969	969	1399	1076

(Source: Colliers CRE ‘In Town Retail Rents)

3.13 Retail rental levels offer a good indication of town centre health. Maidenhead is showing a relatively consistent demand for floor space, although like most centres it has seen a decrease in rents in light of the current economic situation. Rental levels of approximately £969 psm are a competitive rate compared to surrounding town centres, higher than nearby Slough and Bracknell, and only £107 psm below that of recently redeveloped High Wycombe with its Eden Centre.

3.14 Interestingly the FOCUS Retail Demand Report 2007, states that in recent years the UK market has seen a resurgence of previously struggling retailers e.g. Marks and Spencer and Sainsbury’s. The latter has recently had a large redevelopment and increased its floorspace in Maidenhead.

Vacancy Rates

3.15 Table 14 shows vacancy rates collated from data collected during biannual retail surveys for Maidenhead.

Table 14: Vacancy Rates, Maidenhead

Time of Survey	Vacancy Rate
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%
Sep. 2008**	10.1%
Feb. 2009**	11.2%

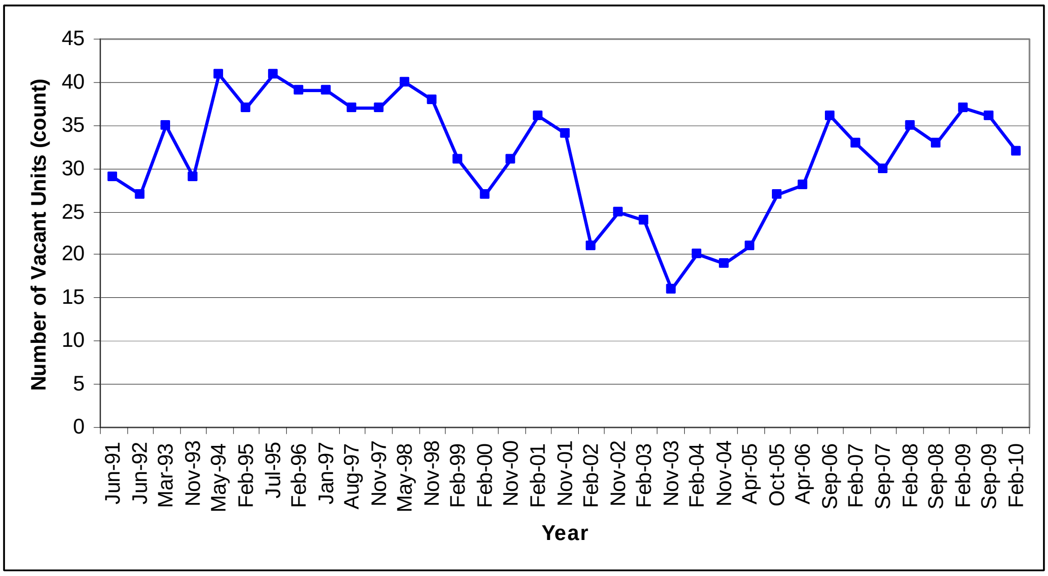
Sep. 2009	10.9%
Feb. 2010	9.7%

(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.*

3.16 The most recent retail survey conducted by the Borough (February 2010) shows there are 32 vacant properties in Maidenhead Town Centre (9.7%). This is below the national average of 12.4%[30] (Colliers CRE state 14.4% nationally in October 2009)[31].

3.17 Historical vacancy rates in Maidenhead town centre since 1991 can be seen in Figure 8. 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 few years (in particular along Queen Street), but these issues are being addressed by PRoM, the Maidenhead Town Centre Area Action Plan and the project of a mixed use redevelopment scheme in this area.

Figure 8: Historical Vacancy Rates in Maidenhead



(Source: RBWM Retail Surveys)

Commercial Yields

3.18 Table 15 is taken from the July 2008 Property Market Report published by the Valuation Office, showing time series data on retail property yields for Maidenhead from Spring 2001 to Summer 2008. For detailed information regarding the value of Retail Property Yields see paragraph 2.22.

Table 15: Retail Property Yields

Date	Slough	Reading	Maidenhead	Windsor	Bracknell
Apr 01	6.75	6.50	6.25	5.75	7.00
Oct 01	7.00	6.50	6.25	6.00	7.00
Apr 02	8.00	6.50	6.25	6.75	7.00
Oct 02	8.00	6.50	6.25	6.75	7.00

[30] http://www.shopping-centre.co.uk/news/fullstory.php/aid/3355/Vacancy_rates_still_in_decline_but_at_a_slower_rate.html - 25th February 2010
[31] Colliers CRE 'Central London Retail Health Check Spring 2010'

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Maidenhead Town Centre Health Check

Apr 03	7.25	6.50	6.25	6.25	7.00
Jan 04	6.50	6.50	7.00	6.25	7.00
Jul 04	6.50	6.50	7.00	6.25	7.00
Jan 05	6.50	6.50	7.50	5.50	7.00
Jul 05	5.50	5.50	6.50	4.75	6.50
Jan 06	4.50	4.50	6.00	4.25	6.00
Jul 06	4.50	4.50	6.00	4.25	6.00
Jan 07	4.50	4.50	5.25	4.25	6.00
Jul 07	4.50	4.25	5.25	4.25	6.00
Jan 08	4.50	4.50	5.25	4.25	6.00
Jul 08	4.75	4.75	5.75	4.50	6.00

(Source: The Valuation Office)

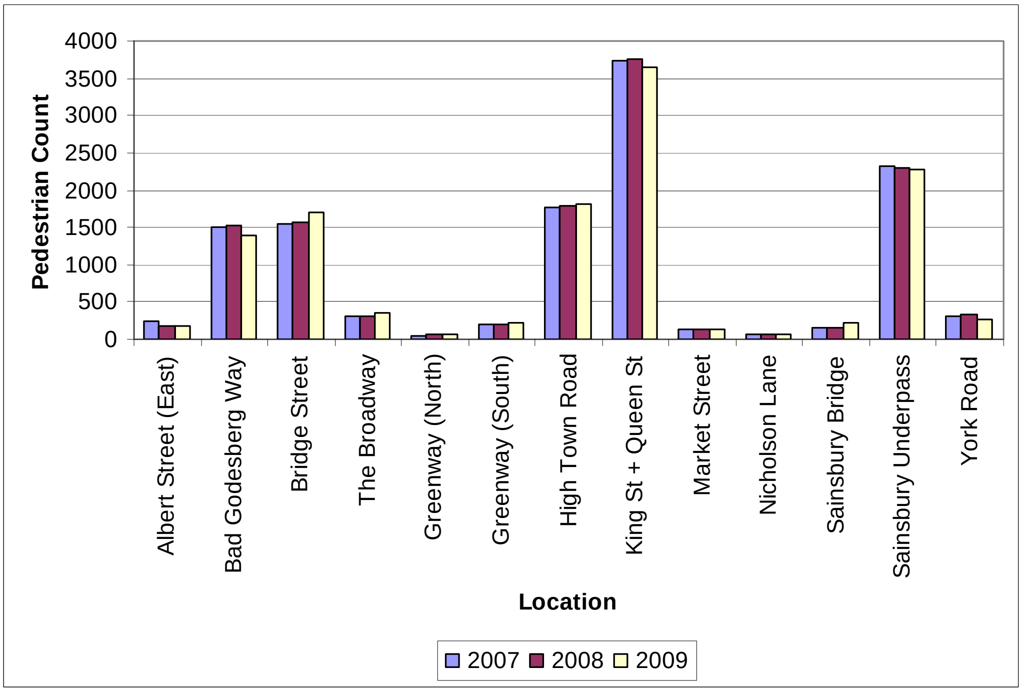
3.19 Maidenhead's retail property yields have remained high in comparison to other town centres in the region. However a recent trend has shown some improvement and the retail property yield for Maidenhead was at its lowest between January 2007 and 2008.

Footfall Counts

3.20 In the past annual footfall surveys for Maidenhead have been undertaken by PMRS in October each year, the most recent survey being on Friday 3rd and Saturday 4th October 2008. The footfall is recorded at 30 sites. These records are available upon request from the Planning Policy Unit. Unfortunately it was not possible to continue this data series in 2009.

3.21 The cordon pedestrian counts were conducted weekdays from 7am – 7pm in September each year. They represent complete cordons around the town centre, and although each site was surveyed on a single day, the counts were spread over a number of days to minimise the impacts of day-to-day variability. Weather conditions were selected to be as consistent as possible. Figure 9 shows the distribution of footfall over a 12 hour period for pedestrians heading into Maidenhead town centre[32].

Figure 9: Inbound Pedestrians in Maidenhead (12hr-period)



[32] It should be noted that this data is intended to monitor commuter patterns and therefore shows routes that allow access in and out of the town centre, rather than thoroughfares in town.

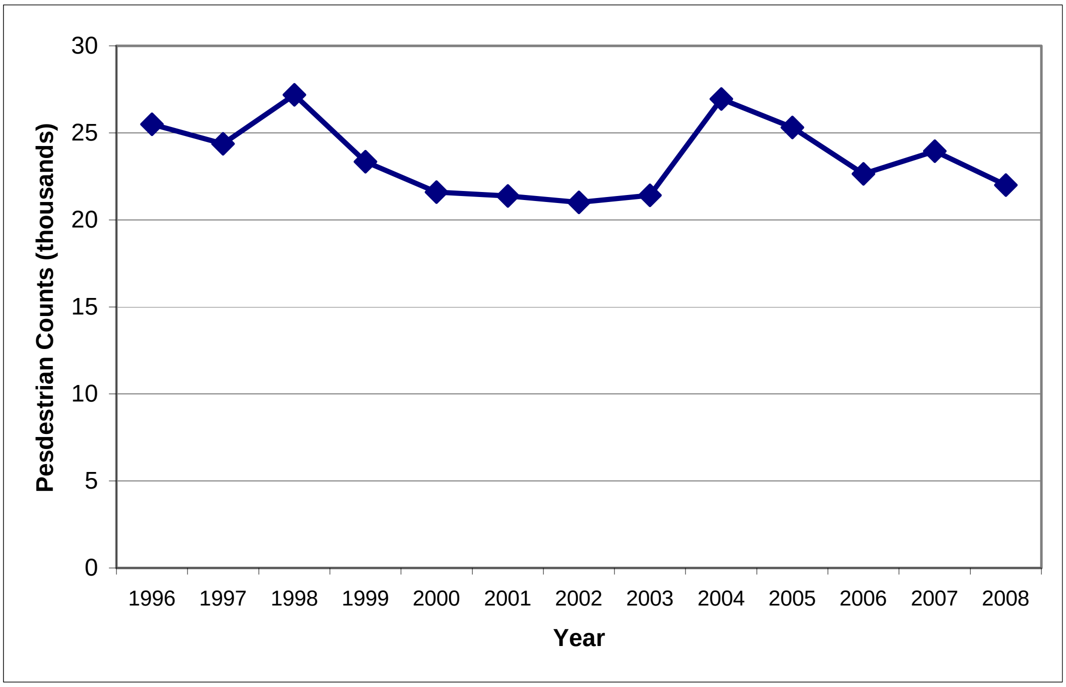
3.22 Table 16 and Figure 10 show historic pedestrian flows, which remained relatively consistent from 1996 with only minor fluctuations. The biggest fluctuation was between 2003 and 2004 with an increase of 5,540. Footfall has decreased since the 2008 Retail Health Check Report.

Table 16: Historical Average Footfall in Maidenhead

Year	Average Count (In Thousands)
1996	25.50
1997	24.37
1998	27.19
1999	23.35
2000	21.60
2001	21.37
2002	21.00
2003	21.41
2004	26.95
2005	25.31
2006	22.64
2007	23.94
2008	21.99

(Source: PMRS Footfall Survey)

Figure 10: Historical Footfall Trend in Maidenhead



3.23 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).

3.24 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.

3.25 The most recent pedestrian count taken in October 2008 shows that the highest pedestrian flow was recorded outside Marks and Spencer, the same as the previous four 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 in that area.

3.26 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.

3.27 The areas 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).

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

3.29 High pedestrian flow counts can also be seen around car parks, in particular the Nicholsons Centre and West Street.

3.30 Figure 10 shows an overall decline in footfall in the centre from 2004/05 that is consistent with trends elsewhere (e.g. Windsor) so would tend to reflect changing market conditions rather than a declining centre.

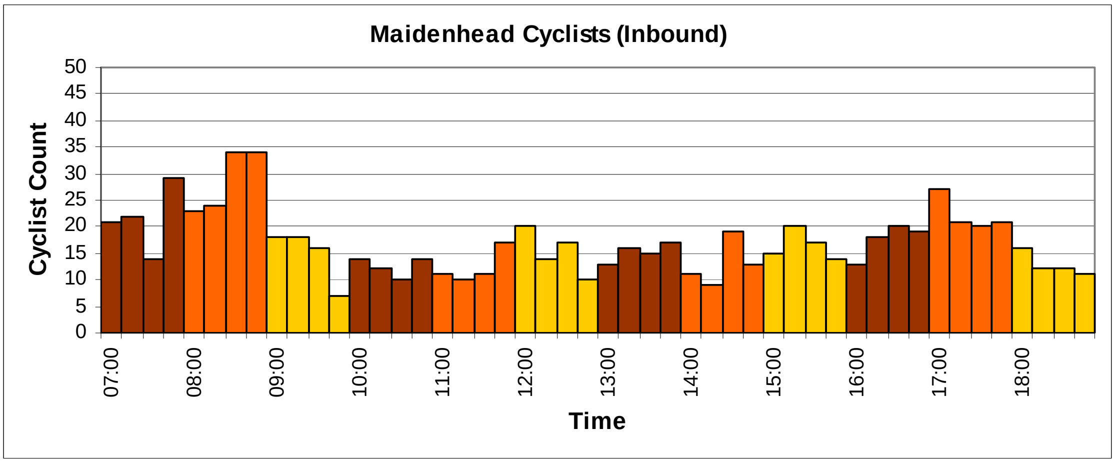
Cyclist Counts

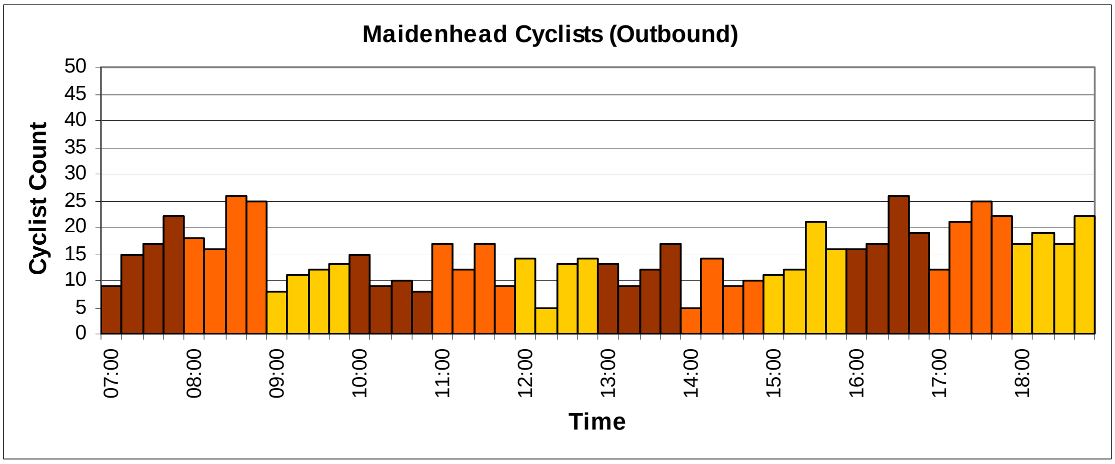
3.31 Cyclist counts were conducted weekdays from 7am – 7pm in September 2009. They represent complete cordons around the town centre, each site being surveyed on a single day to minimise impacts of day-to-day variability. Weather conditions were selected to be as consistent as possible.

3.32 Peak cycle flows (inbound and outbound) reflect commuter times (see the graphs in Figure 11). Actual numbers of cyclists are surprisingly low for a town of Maidenhead's size, indicating alternative transport is used.

3.33 Unlike with pedestrian counts, cyclist flows generally do not increase noticeably 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 could indicate Maidenhead has a wide workforce catchment.

Figure 11: Cyclist Counts in Maidenhead, 2009





(Source: RBWM Transport Surveys 2009)

Accessibility

3.34 Parts of Maidenhead town centre benefit from being pedestrianised including sections of the High Street and King Street. However local residents predominately access Maidenhead retail centre through the use of privately owned vehicles. The town centre is bordered on two sides by busy A-roads with limited opportunity for pedestrians and cyclists to cross. Cycle access to and through the town centre is deemed an area for improvement.

3.35 Maidenhead Station is located to the south west of the town centre and is popular with commuters as it provides services to Slough and London Paddington as well as to Reading and the west. Facilitating interchange between trains and buses / taxis, and improving access to the station on foot and by bike are seen as priorities for the future.

3.36 Maidenhead is to be a Crossrail terminus, providing high frequency, convenient and accessible train services across London from 2017. This is a joint venture between Transport for London (TfL) and the Department for Transport (DfT) to develop a new railway route through London running from Maidenhead and Heathrow via Paddington, Liverpool Street and Stratford to Shenfield, and Abbey Wood. The Crossrail Bill was given Royal Assent on 22nd July 2008, and construction works are now underway.

3.37 Maidenhead train station has joined Windsor and Eton Riverside and Slough stations as key arrival and departure points for visitors to Eton Dorney in the Olympics

2012, and will be officially promoted by London 2012, with shuttle buses transferring spectators between the station and the rowing venue.

3.38 There are a number of bus services supplying Maidenhead town centre, including routes to outlying residential areas as well as services to neighbouring towns and villages. There are stops within the town 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 displays. Services do not run into the evenings beyond 7pm but there are some on Sundays.

3.39 There are numerous long and short stay car parks in and around the town centre, which provide accessibility to car users (see Table 17). 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 17: Maidenhead Car Parking Prices (as at February 2010)

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	£2.00
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

*(Source: RBWM) *Evenings only **Price is for all day parking*

3.40 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 around the town centre. Shopmobility has been available in Maidenhead for approximately 14 years.

Public Perceptions

3.41 Since 2006 there have been several 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 the Local Development Framework (LDF). 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.

3.42 A subsequent consultation was held for 'Maidenhead Town Centre – Towards 2026' 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; these included the Town Hall, the Clock Tower, Cressett Towers, Queen Anne House (on the Broadway) and St Mary's House. All of these 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 Hutchinson 3G UK Ltd and Grenfell Island.
- Taller buildings were largely considered eyesores not because of their height but because they were regarded as ugly.

3.43 More recently, as a result of the establishment of the Partnership for the Rejuvenation of Maidenhead (PRoM), consultation on ‘A Vision for Maidenhead Town Centre’ took place in 2008. The findings have subsequently been incorporated in the published ‘Vision’ January 2009 and are now being taken forward as part of the Area Action Plan (AAP) for Maidenhead Town Centre.

3.44 The ‘Maidenhead Town Centre Area Action Plan Preferred Options Document’ was published for consultation in January/ February 2010. The main issues raised were:

- Expand Maidenhead shopping - need increased variety of shops, particularly a department store and independent specialist shops.
- Need to lower rents and rates to encourage new shops.
- More cafes and restaurants of better quality.
- Improved management of the evening economy.
- Need to plan to prevent future road congestion.

3.45 The Council is committed to preparing both a Core Strategy DPD and a Delivery & Development Principles DPD as part of the LDF. The results of the consultation on these documents (Spring 2009) are broadly consistent with those found in earlier consultations (see paragraphs 3.41 and 3.42). The results of the consultation will feed into the preparation of both the Core Strategy and the Delivery & Development Principles DPDs.

Perceptions of Safety & Occurrence of Crime

3.46 The statistics in Table 18 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. It is important to note that these figures are the results of day and night uses of the town centre.

Table 18: Crime Statistics for Maidenhead

Crime Category	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10
Violence -v- Person	296	343	414	405	431	440	357	349
Robbery	10	13	13	19	13	15	11	16
Theft of Vehicle	15	10	14	9	5	5	5	4
Theft from Vehicle	72	68	67	96	52	38	22	49
Burglary Dwelling	11	15	12	5	9	4	3	3
Shoplifting	209	161	169	167	158	175	214	194
Criminal Damage	142	171	188	156	168	145	138	111
Burglary Other	52	57	63	54	49	41	34	68

(Source: Thames Valley Police)

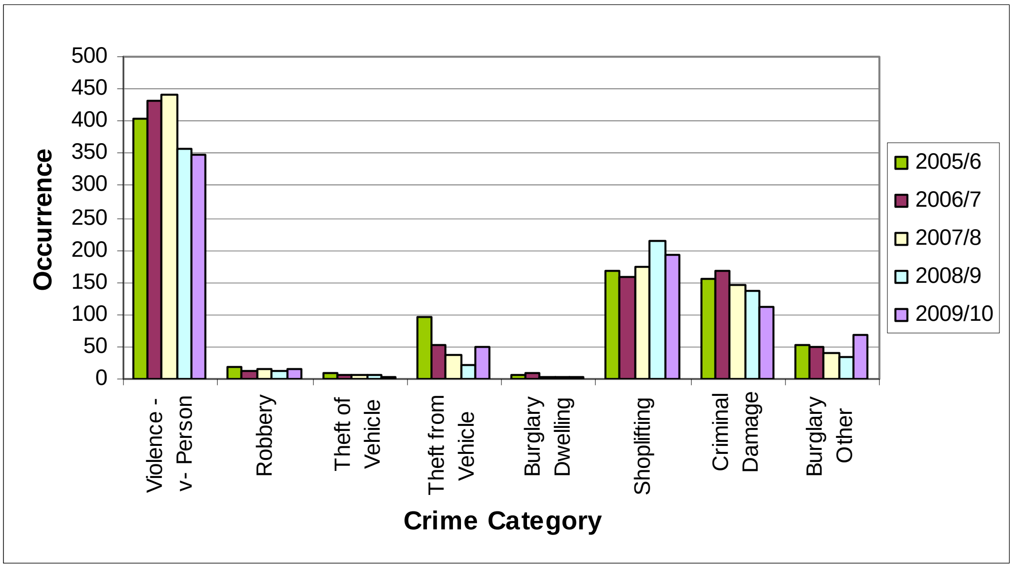
Maidenhead Town Centre Health Check

3.47 Maidenhead's most frequently occurring crime has been within the category of violence against the person, which is in line with the trend in Windsor. However this has seen a decline of 21% from the high in 2007/8 to 2009/10 period. Incidences of criminal damage and shoplifting also remain relatively high, although declining, whilst theft from a vehicle, burglary and robbery have increased in the last year.

3.48 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 these perceptions. These sites include the former cinema site at the junction of the Green Way / High Street and some of the buildings along Queen Street.

3.49 The 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.

Figure 12: Crime Statistics for Maidenhead



(Source: Thames Valley Police)

Environmental Quality

3.50 The quality of the streets and spaces – the public realm – within the town centre is important to the shopping experience of residents and visitors. Within recent years the shopping area has been improved with raised planters, and better street furniture particularly benches and bins. However, the public realm remains mixed, with a variety in the type and quality of materials resulting in a somewhat disjointed, patchwork feel to the town centre.

3.51 In response to this and the need to improve the look and feel of the town centre, a Public Realm Strategy was produced in 2009 by the Council. In working to achieve high quality streets and spaces, the Strategy provides a framework for enhancing the town centre's appearance. This will ensure a consistency of approach, through setting design principles and the need for a consistent palette of paving materials and family of street furniture. The Public Realm Strategy recommends a number of complementary strategies be undertaken such as lighting, wayfinding and public art noting that these are important elements for defining the quality of the streets and spaces. These will be produced in time, however, as a first step to improving the streets and spaces – and in line with the Strategy – the Council has laid out a variety of samples of paving and a family of street furniture prototypes (bench, bin, signage and cycle racks) and is currently seeking the views of the community before looking to roll this out as funding becomes available (for example, schemes such as resurfacing pedestrian areas are included in the Developer Contributions Supplementary Planning Document) or included as part of development schemes.

3.52 The Council wishes to develop a high quality and unified public realm linking key areas such as the shopping area, railway station and nearby parks in order to positively support and enhance the town centre's image and future growth.

3.53 Over the last couple of 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.

3.54 King Street has 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.

3.55 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 from this secondary shopping area.

3.56 To combat anti-social behaviour associated with alcohol, Maidenhead Town Centre was designated under the 'Public Places Order (Alcohol Consumption) 2009', which restricts public drinking.

3.57 The former cinema site on the corner of the High Street and the Green Way was demolished in October 2008 and gained planning permission in February 2009 for redevelopment to a four-storey office and café. Nearby improvements have been made along the Green Way (formerly highlighted as needing renovation) as a result of S106 contributions from a different development on Bridge Avenue, resulting in a new pathway, benches, fencing, planting and grass verge.

3.58 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.

3.59 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'[33] 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 not desirable pedestrian routes. The parks are considered ancillary to the town centre not integral. Indeed in recent consultations, many people have commented on the need for a town square to provide a central open space. The recently completed redevelopment of Sainsbury's at Providence Place has created a piazza that provides some for additional open space in the town, but not the focal point of a town square.

Looking to the Future

3.60 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[34]. As part of its local planning strategy, the council has

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33 http://www.rbwm.gov.uk/public/pp_maidenhead_town_centre_conservation_area_statement.pdf
34 www.maidenheadwaterways.org/

Maidenhead Town Centre Health Check

produced a planning brief – the "Maidenhead Waterways Framework", to guide future planning decisions along the waterway corridor[35].

3.61 The council has 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[36]. 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.

3.62 Cabinet adopted the 'Vision' for Maidenhead Town Centre as a strategy for the area in 2009. The vision has led to the production of a draft Area Action Plan (AAP) for the formal Local Development Framework process. Consultation on the AAP was carried out in January/ February 2010. Further studies have been conducted to support this work, including a 'Public Realm Strategy', 'Transport Modelling' and Retail Capacity Update[37]. Further consultation on the AAP to produce a final version for Government examination will be carried out during 2010.

Conclusion

3.63 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, good 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.

3.64 The centre has a good 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 shows a town that meets the needs of the community rather than encouraging visitors. Vacancy rates are currently quite high at 9.7% but below the national average of 12.4%[38] (Colliers CRE state 14.4% nationally in October 2009)[39]; some of the vacancy can be accounted for by the temporary closure of several retail units along Queen Street for redevelopment, but vacancy rates do tend to reflect the economic retail market as a whole[40]. Retail rents have decreased slightly, but are still competitive when compared to nearby towns.

3.65 There are plenty of car parking facilities available making the town accessible to those who have a motor vehicle. Improving access to the train station on foot and by bike are seen as priorities for the future. Past footfall counts show that Maidenhead has a relatively consistent visitor attraction.

3.66 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 AAP will provide the framework for their improvement.

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35 http://www.rbwm.gov.uk/web/pp_maidenhead_waterways_framework.htm

36 http://www.rbwm.gov.uk/web/prom.htm

37 The timeframe for the production of the AAP is set out in the Council's Local Development Scheme http://www.rbwm.gov.uk/web/pp_lds.htm

38 http://www.shopping-centre.co.uk/news/fullstory.php/aid/3355/Vacancy_rates_still_in_decline_but_at_a_slower_rate.html - 25th February 2010

39 Colliers CRE 'Central London Retail Health Check Spring 2010'

40 Colliers CRE National Retail Barometer (Retail Voids) Winter 2010 Report.

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' (PPS4, Annex B).* (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 shops to cater to the more 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 (1,451 m^2). 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 19 and Figure 13 show the composition of uses for this core area at February 2010.

Table 19: Breakdown of Ascot by Use Class at February 2010

Use Class	Number of Units Surveyed	Percentage of Overall Units
A1	30	60%
A2	9	18%
A3	6	12%
A4	2	4%
A5	0	0%
Sui Generis	2	4%
Other	1	2%
Total	50	100%

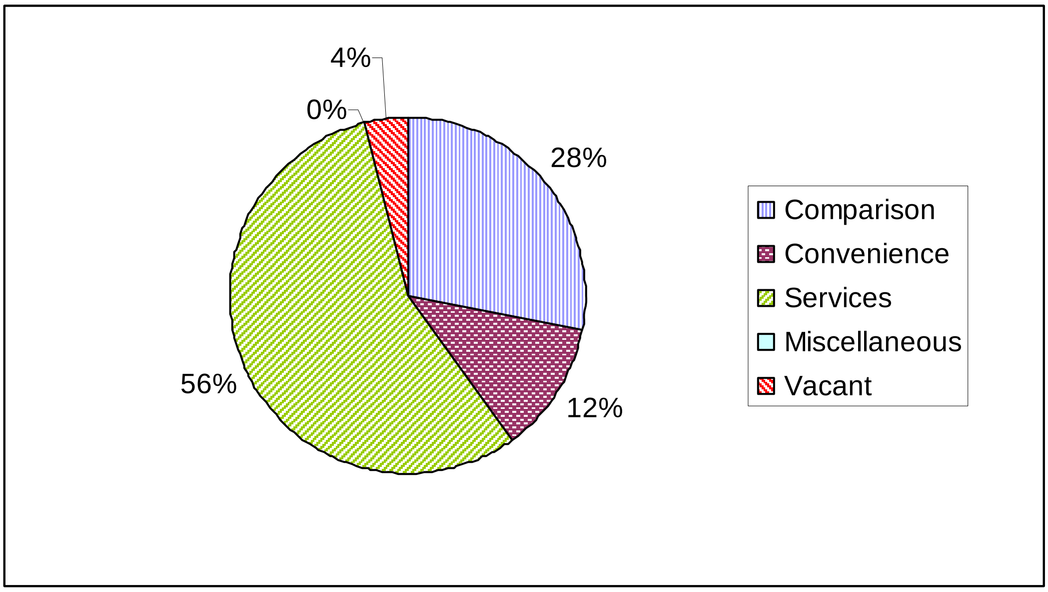
Health Check of Ascot and Sunningdale District Centres

Table 20: Composition of Uses in Ascot February 2010

Type of Use	Number of Units Surveyed	Percentage of Overall Units
Comparison	14	28%
Convenience	6	12%
Services	28	56%
Miscellaneous	0	0%
Vacant	2	4%
Total	50	100%

(Source: RBWM Retail Survey, February 2010)

Figure 13: Composition of Ascot District Centre February 2010



4.7 As illustrated in Figure 13, ‘services’ account for over half the retail unit usage in Ascot, varying from cafés 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, gift shops and a car showroom. The estimated comparison goods floorspace is 1,600m^2 (this is based on the most recent Experian Goad surveys, with any net comparison goods sales areas in the main food stores added)[41].

4.10 **Sunningdale** – Biannual retail surveys are conducted in Sunningdale to record the usage of each retail unit. Table 21 provides information on the use classes with Table 22 and Figure 14 showing the composition of uses in the retail centre at February 2010.

[41] Windsor and Maidenhead Retail Capacity Update 2009

Health Check of Ascot and Sunningdale District Centres

Table 21: Use Class breakdown of Sunningdale, February 2010

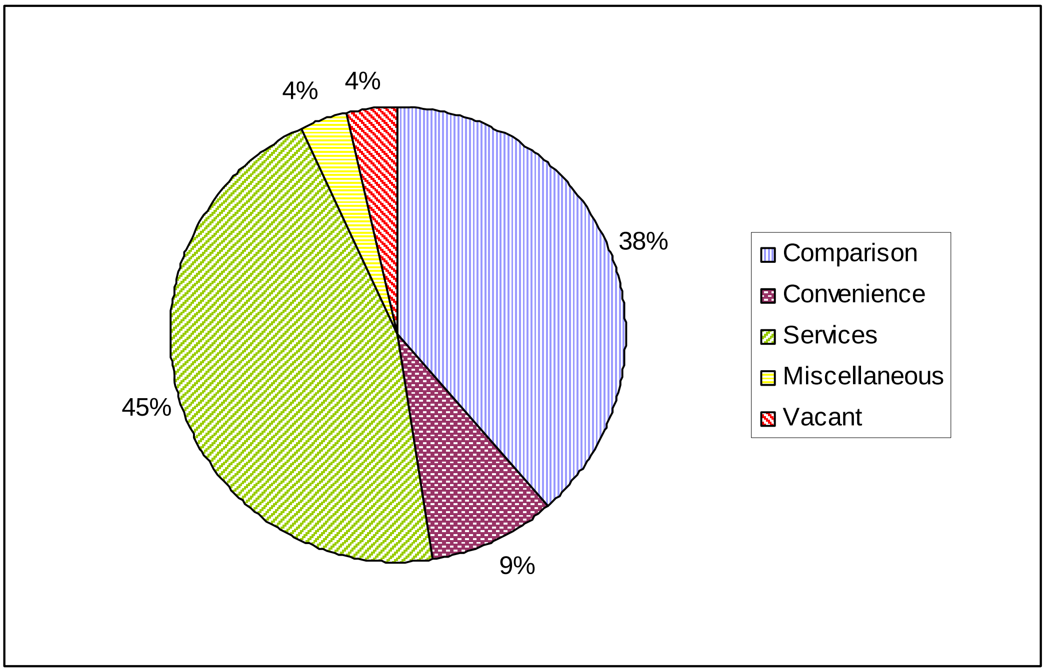
Use Class	Number of Units Surveyed	Percentage of Overall Units
A1	32	56%
A2	12	20%
A3	6	11%
A4	1	2%
A5	1	2%
Sui Generis	2	4%
Other	3	5%
Total	57	100%

Table 22: Composition of Uses in Sunningdale, February 2010

Type of Use	Number of Units Surveyed	Percentage of Overall Units
Comparison	22	38%
Convenience	5	9%
Services	26	45%
Miscellaneous	2	4%
Vacant	2	4%
Total	57	100%

(Source: RBWM Retail Surveys, February 2009)

Figure 14: Composition of Uses in Sunningdale District Centre, February 2010



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. The estimated comparison goods floorspace is 1,700m² (this is based on the

4 Health Check of Ascot and Sunningdale District Centres

Experian Goad surveys, with any net comparison goods sales areas in the main food stores added)[42].

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 and Starbucks. 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 836m², a specialist butchers, bakery, newsagents/post office and a Smile convenience store attached to the Esso petrol station. According to the 'Windsor and Maidenhead Retail Capacity Update 2009', the floorspace within Ascot centre dedicated to convenience shopping is approximately 1,214m².

4.14 The comparison shops offered account for a healthy 1,600m² of floorspace within the retail centre, according to 'Windsor and Maidenhead Retail Capacity Update 2009'.

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, and an independent butcher's, amongst others. According to the aforementioned 2009 Retail Capacity Update there is approximately 1,734m² floorspace 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 (approximately 1,693m²), again aimed towards affluent local residents. Shops offered vary from interior designers to boutiques and cafés to beauty salons. At the time of publishing, there was no retailer requirement information available for either Sunningdale or Ascot.

Vacancy Rates

4.18 **Ascot** - At the time of the last retail survey in February 2010 there were two vacant properties, equating to a 4% rate (see Table 20).

4.19 **Sunningdale** - During the last retail survey of Sunningdale in February 2010, there were two vacant units in the centre. This equates to a vacancy rate of 4% (see Table 22).

Commercial Yields

4.20 Due to the small size of Ascot and Sunningdale district retail centres, retail property transactions are scarce. At the time of publication, no details were available on retail property yields for these areas.

Pedestrian Flows

4.21 **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.

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

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[42] Windsor and Maidenhead Retail Capacity Update 2009

Health Check of Ascot and Sunningdale District Centres

Accessibility

4.23 **Ascot** – There are two bus routes serving the district centre, which call at the Racecourse, providing links to Bracknell and Windsor. A number of other services call at stops in the vicinity of Heatherwood Hospital, approximately 1 mile from the centre. Ascot train station is only a 10-minute walk away. However access to the district centre is predominately by car.

4.24 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. A car park has been created opposite the Racecourse and on-street parking is also available to enable high turnover along a significant part of the High Street and London Road.

4.25 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.

4.26 **Sunningdale** - Accessibility to Sunningdale district centre is mainly by car or on foot. The district centre is easily accessible from Sunningdale railway station and is also on bus routes, which provide links to Ascot and Windsor, as well as to destinations in Surrey. 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

4.27 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 centres 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.

4.28 The Council is committed to preparing both a Core Strategy DPD as well as a Delivery & Development Principles DPD as part of the LDF. The results of the consultation on these documents (Spring 2009) are broadly consistent with those found in earlier consultations. The results of the consultation will feed into the preparation of both the Core Strategy and the Delivery & Development Principles DPDs.

Perceptions of Safety and Crime

4.29 **Ascot -** There are four policing beat codes in the Ascot area: 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.

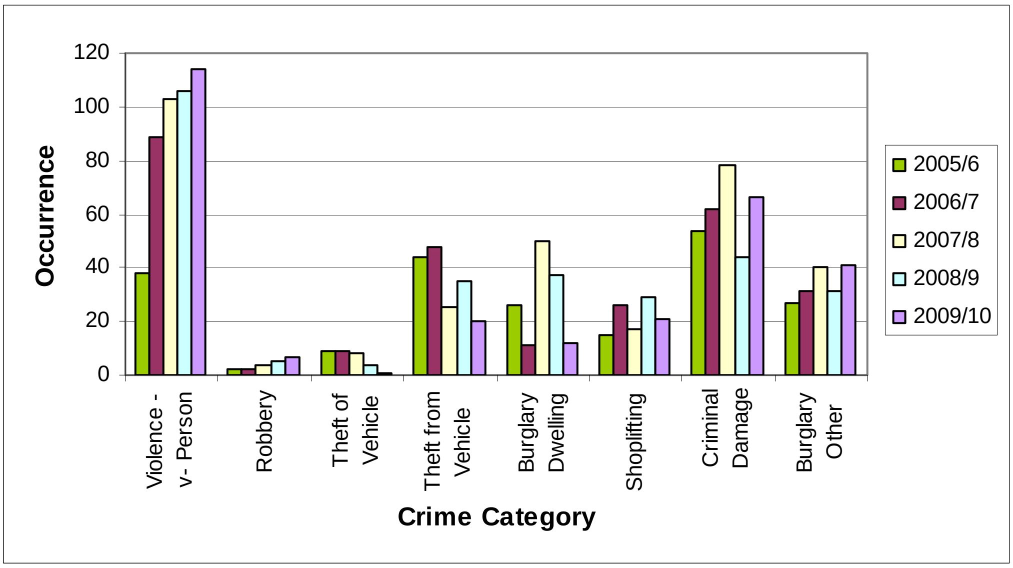
Table 23: Crime Statistics for South Ascot/Racecourse

Crime Category	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10
Violence -v- Person	34	59	58	38	89	103	106	114
Robbery	6	3	3	2	2	4	5	7
Theft of Vehicle	14	17	15	9	9	8	4	1
Theft from Vehicle	57	51	34	44	48	25	35	20
Burglary Dwelling	24	33	8	26	11	50	37	12
Shoplifting	15	21	21	15	26	17	29	21
Criminal Damage	55	72	47	54	62	78	44	66
Burglary Other	18	27	38	27	31	40	31	41

(*Source: Thames Valley Police)*

Health Check of Ascot and Sunningdale District Centres

Figure 15: Crime Statistics for South Ascot/Racecourse



4.30 During the period of 2009/10 half of the crime categories saw a decline from previous years. In the 2009/10 period violence against the person; robbery; criminal damage and burglary all increased slightly on the previous year.

4.31 **Sunningdale -** The results for Sunningdale are varied; some categories have seen a decrease in incidents, e.g. theft of vehicle, shoplifting and burglary of dwelling, whilst in contrast criminal damage and theft from vehicle have noticeably increased in the 2009/10 period.

Table 24: Crime Statistics for Sunningdale

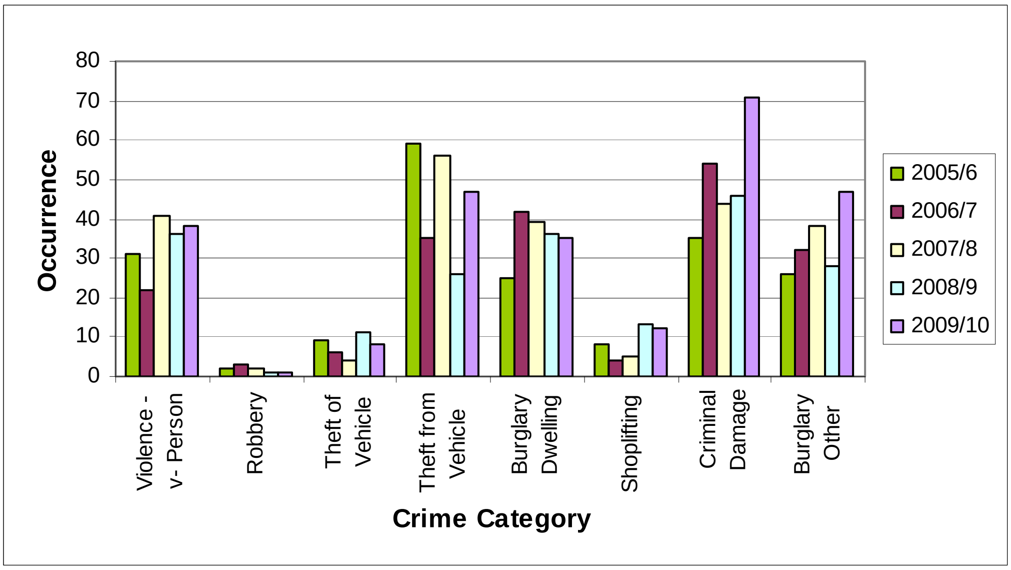
Crime Category	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10
Violence -v- Person	34	31	31	31	22	41	36	38
Robbery	2	3	1	2	3	2	1	1
Theft of Vehicle	10	10	10	9	6	4	11	8
Theft from Vehicle	57	75	48	59	35	56	26	47
Burglary Dwelling	43	42	18	25	42	39	36	35
Shoplifting	10	9	4	8	4	5	13	12
Criminal Damage	43	41	37	35	54	44	46	71
Burglary Other	45	50	32	26	32	38	28	47

(Source: Thames Valley Police)

4.32 Policing priorities for Ascot, Sunningdale and Sunninghill neighbourhoods 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 being 114 cases in 2009/10.

Health Check of Ascot and Sunningdale District Centres

Figure 16: Crime Statistics for Sunningdale



Environmental Quality

4.33 **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. A negative aspect is the volume of traffic in the area particularly 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.

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

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

4.36 To combat anti-social behaviour associated with alcohol, Ascot, Sunninghill and Sunningdale have all been designated under the 'Public Places Order (Alcohol Consumption) 2009', which restricts public drinking.

Conclusions

4.37 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 the more affluent community.

4.38 **Ascot** – The indicators based on PPS4 criteria have shown Ascot to be a busy town centre, with a low vacancy rate. 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 a wealthy area. This is also reflected in the high physical quality of the centre.

4.39 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, can detract from the environmental quality. The minimal vacant floor space reinforces the present health of the centre.

4.40 **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.

Health Check of Ascot and Sunningdale District Centres

4.41 The centre is attractive and well maintained, however its vitality is hindered by its disjointed nature and the heavy traffic 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.

5 Local Centres and Parades

5.1 The Royal Borough has a number of local centres in addition to centres already covered in the report. Local centres are defined as: *"a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette"* (PPS4, Annex B).

5.2 Local centres and parades have been monitored by the Planning Policy Unit for several years. Information on these centres is available on request. A list of these centres is available in Table 25. Percentage A1 is based on all recorded units including 'other e.g. D1 uses'. Vacancy is based on retail units only.

Table 25: Local Centres and Parades in the Borough at February 2010

Local Centres and Parades		% A1 (of total units)	% Vacant (of total retail units)
Cookham	• Cookham Village • Cookham Rise	68% 58%	3% 3%
Datchet		56%	19%
Eton	• Eton High Street • Eton Wick	62% 75%	14% 0%
Holyport		100%	0%
Maidenhead Area	• Bridge Road • Shifford Crescent • Gloucester Road • Cookham Road • St Mark's Road/ Crescent • Wootton Way • Highway Avenue • Farm Road • Hampden Road • Ross Road • Wessex Way • Woodlands Park	67% 83% 67% 63% 84% 86% 100% 80% 67% 67% 73% 70%	11% 0% 0% 13% 0% 14% 0% 0% 0% 0% 18% 0%
Old Windsor		53%	8%
South Ascot		65%	0%
Sunningdale	• Silwood Road	60%	38%
Sunninghill		59%	4%
Windsor Area	• St Leonards Road • Clewer Hill Road • Clarence Road/ Dedworth Road • Vale Road/ St Andrews Avenue • Dedworth Green • Dedworth Road	50% 63% 55% 52% 53% 61%	6% 0% 0% 0% 7% 6%
Wraysbury		65%	12%

5.3 At the time of the last survey (February 2010) all the local retail centres appeared healthy with relatively low vacancy (some seeing none at all) offering a good mix of shop types and services available to local residents. Some of the centres that have low A1 percentages offer other community facilities that increase the viability of the centre e.g. dentist, medical centre, library.

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