

Royal Borough of Windsor and Maidenhead

Retail Health Check



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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 Growth¹. 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 (where data is available):

- 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. The town centre exhibits good levels of vitality and viability with historically low yields and 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.

The latest developments in Windsor include the Waitrose development within the King Edward Court shopping centre and the closure of the Caley's department store, (which was converted into a new hotel and retail units; both the hotel and new units were trading by summer 2010).

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 reasonable level of multiple representations, and historically moderate yields with strong rents. The town centre is easily accessible by car and is served by good public transport links.

Developments in recent years 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.

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 Submitted Area Action Plan (AAP)² as part of the formal Local Development Framework process. This final

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/pp_lds.htm

Introduction

version was examined by an independent government inspector in March 2011. The plan was found sound in June 2011 and is due to be adopted by Council in September 2011.

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 elsewhere³.

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 proximity⁴. Further, the 'Heart of Slough' proposal to regenerate 11.75ha of land in the town centre⁵ (work has already commenced), and the relatively 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 six consecutive quarters made the recession one of the longest and most severe on record. Consequently recovery of town centres and the retail industry is expected to be slow⁶. 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.

³ Windsor and Maidenhead Retail Capacity Update 2009

⁴ <http://www.bracknell-forest.gov.uk/bracknell-town-centre-retail-study-impact-analysis.pdf>

⁵ <http://www.slough.gov.uk/services/16968.aspx>

⁶ 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.
Mixed uses	Where a use that incorporates more than one of the above use classes exists e.g. hairdresser and beautician.
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.

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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.
Maidenhead Town Centre Area Action Plan (AAP)	A Development Plan Document that forms the planning strategy for Maidenhead town centre, ensuring coordinated development of an appropriate type, scale, mix and quality.
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.
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.

Introduction

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1 Introduction

1.1 This is the 2010/11 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) that forms part of the development plan for the Royal Borough, defines both Windsor and Maidenhead as secondary regional centres⁷. Maidenhead is also identified as a second tier Sub-regional hub⁸. 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 views⁹;
- Perception of safety and occurrence of crime¹⁰;
- 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).

⁷ Based on Policy TC1 of the South East Plan

⁸ Based on Policy WC BV1 of the South East Plan.

⁹ Borough wide information on residents views can be found in the RBWM Place Survey (annual publication).

¹⁰ 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

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

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 survey also includes Windsor Royal Station and Bachelors Acre (the latter is new to our records), although these are not listed in the Local Plan.

2.4 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).

2.5 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

2.6 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 2011 (see Table 1).

Table 1: Use Class Breakdown in Windsor Town Centre at February 2011

Use Class	2006	2007	2008	2009	2010	2011
A1	265	260	255	252	244	242
A2	28	28	27	27	26	26
A3	60	62	63	65	66	67
A4	14	14	14	14	13	13
A5	5	5	4	4	4	3
Sui Generis	-	-	-	-	6	7
Mixed Uses	-	-	-	-	-	5
Other	11	8	9	10	6	8
Total	383	377	372	372	365	371

(Source: RBWM Retail Surveys)

Windsor Town Centre Health Check

2.7 The increase in the net number of units since the February 2010 survey is the result of the increased number of units surveyed (Bachelors Acre), the completion of the first phase of a redevelopment scheme at Daniels and the sub-division of a unit in Royal Windsor Station. It should be noted however that 4 units are currently not included in the survey because they are undergoing redevelopment (and therefore are not vacant because they are not there to be occupied). The survey has also been altered to include 'Mixed Uses'.

2.8 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.

2.9 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.

2.10 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.

2.11 The comparison goods floorspace in Windsor Town Centre is estimated to be 36,216m² (this is based on the most recent Experian Goad surveys, with net comparison goods sales areas in the main food stores added)¹¹. 'Miscellaneous' is deemed to be any uses that do not perform the function of a shop e.g. dentist, offices.

Table 2: Composition of Uses in Windsor Town Centre at February 2011

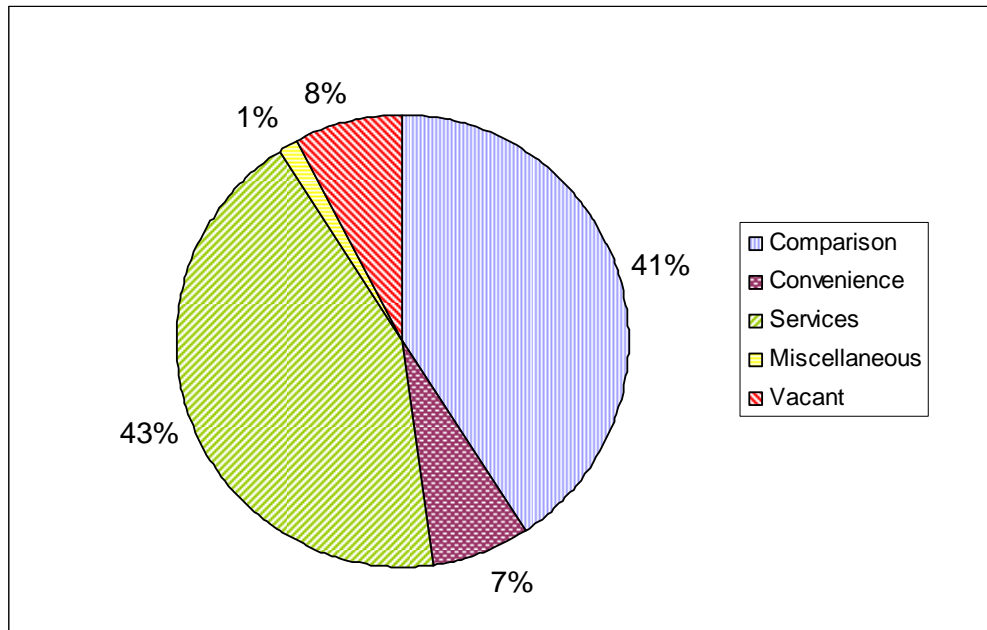
Type of Use	Number of Units Surveyed	Percentage of Overall Units
Comparison	148	41%
Convenience	25	7%
Services	156	43%
Miscellaneous	5	1.5%
Vacant	28	7.5%
Total:	362	100%

(Source: RBWM Retail Surveys)

¹¹ Windsor and Maidenhead Retail Capacity Update 2009

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Figure 1: Composition of Uses in Windsor Town Centre February 2011



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

Retailer Representations and Intentions to Change

2.12 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.

2.13 'National Multiple' outlets represented in Windsor include Next, New Look, Marks and Spencer, W H Smith, Boots (who have recently increased their representation by acquiring the former Woolworths store at the top end of Peascod Street), Waitrose (1,976m² – net convenience floorspace) and Superdrug, amongst others.

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

2.15 John Lewis withdrew from Windsor in June 2006, however planning permission¹² was granted on the site for the creation of three new retail units with a hotel above. This work completed in summer 2010, with both of the retail units (TK Maxx and Esquires Coffee) trading.

2.16 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 still also a requirement in the town for stores selling small and large white electrical goods, gardening equipment, video rental and sports equipment.

¹² Planning application reference: 07/01660

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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
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 ¹³
Mar 10	75	EGi

2.17 Using published EGi¹⁴ 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). Unfortunately no update was available at the point of publication.

Shopping Rents

2.18 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 shows the rental levels for Windsor 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)

2.19 Rental levels for Windsor have risen since 2000, indicating a healthy centre that is increasingly in demand. According to a Colliers CRE 'In Town Retail Rents' (February

¹³ 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.

¹⁴ EGi is the online property information service of the Estates Gazette Group.

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2010), Windsor rents were £1561 psm in 2009. Although this is a decrease since 2008, 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. Unfortunately no update was available at the point of publication.

Vacancy Rates

2.20 Table 5 shows vacancy rates collated 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%
Sep. 2010	7.5%
Feb. 2011	7.5%

(Source RBWM Retail Surveys)

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

2.21 In the most recent retail survey of Windsor (February 2011), there were 28 vacant properties (7.5%), which is an increase since early 2010, although still well below the national average rate of 14.5%¹⁵. (Colliers CRE state 13.7% nationally in October 2010)¹⁶.

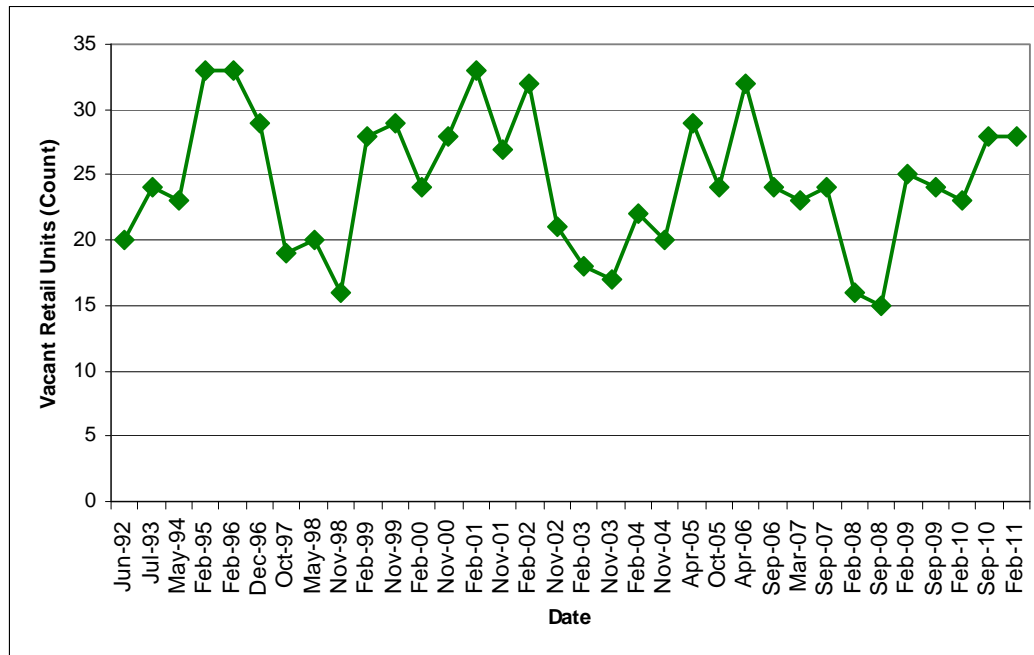
2.22 Historically Windsor has had a relatively low vacancy rate compared to Maidenhead (see Table 5/ Figure 2).

¹⁵ Shopping Centre February 2011 article http://www.shopping-centre.co.uk/news/fullstory.php/aid/4187/Vacancy_rates_update.html

¹⁶ Colliers CRE 'National Retail Barometer Winter 2010'

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Figure 2: Historical Retail Vacancy in Windsor Town Centre



(Source: RBWM Retail Surveys)

Historical Commercial Yields

2.23 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).

2.24 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.

2.25 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. Whilst there has been no update for the last few years, table 6 gives an indication of historical trends.

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

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Date	Slough	Reading	Maidenhead	Windsor	Bracknell
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)

2.26 The last seven years shown in table 6, show 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

2.27 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. Annual footfall surveys for Windsor have been undertaken by PMRS in October each year, the most recent survey being on Friday 1st and Saturday 2nd October 2010. The footfall is recorded at 30 sites. In 2010 a few of these points had to be revised owing to construction work, but these new sites were very comparable to previous years.

2.28 Past average annual pedestrian counts for Windsor since 1996 can be seen in Table 7 and Figure 3. 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 Windsor¹⁷. (Please contact the Planning Policy Unit for further information on footfall counts).

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 2010 follow the trend of the highest counts being consistently found along Peascod Street, in King Edward Court and around Windsor Royal Station/ 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.

Table 7: Average Footfall in Windsor

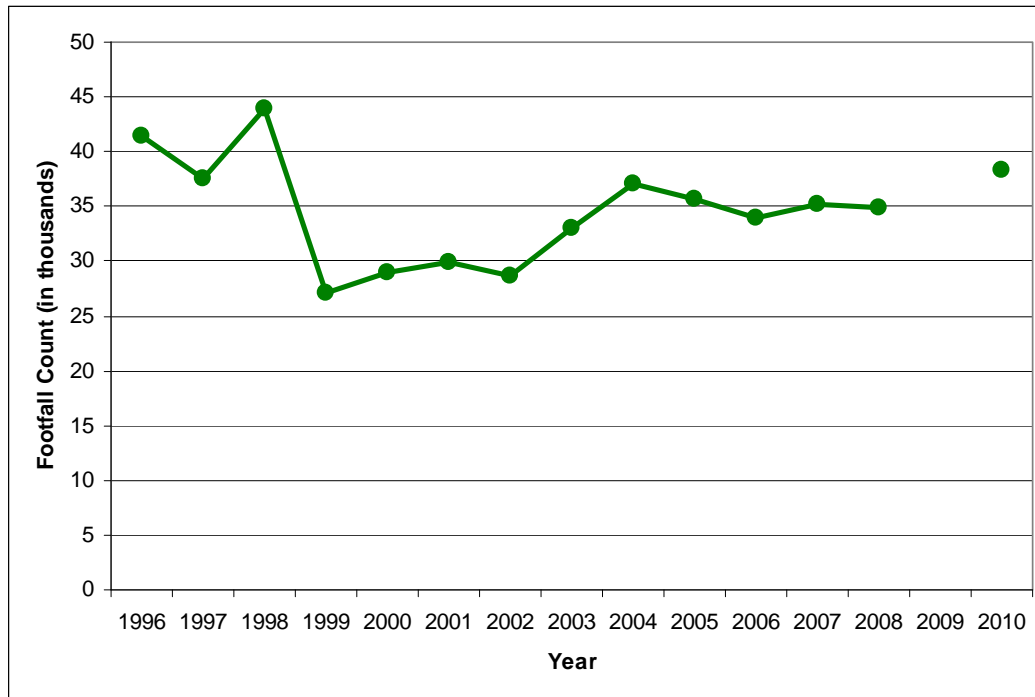
Year	Average Count (In Thousands)
1996	41.10
1997	37.55
1998	43.98
1999	27.17
2000	28.95
2001	29.95
2002	28.64
2003	33.06
2004	37.02
2005	35.63
2006	33.93
2007	35.24
2008	34.96
2009	-
2010	38.31

(Source: PMRS Footfall Surveys. NB. In 2009 no survey was conducted)

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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 2010 are consistent with these findings from previous years.

Figure 3: Windsor Pedestrian Footfall Since 1996



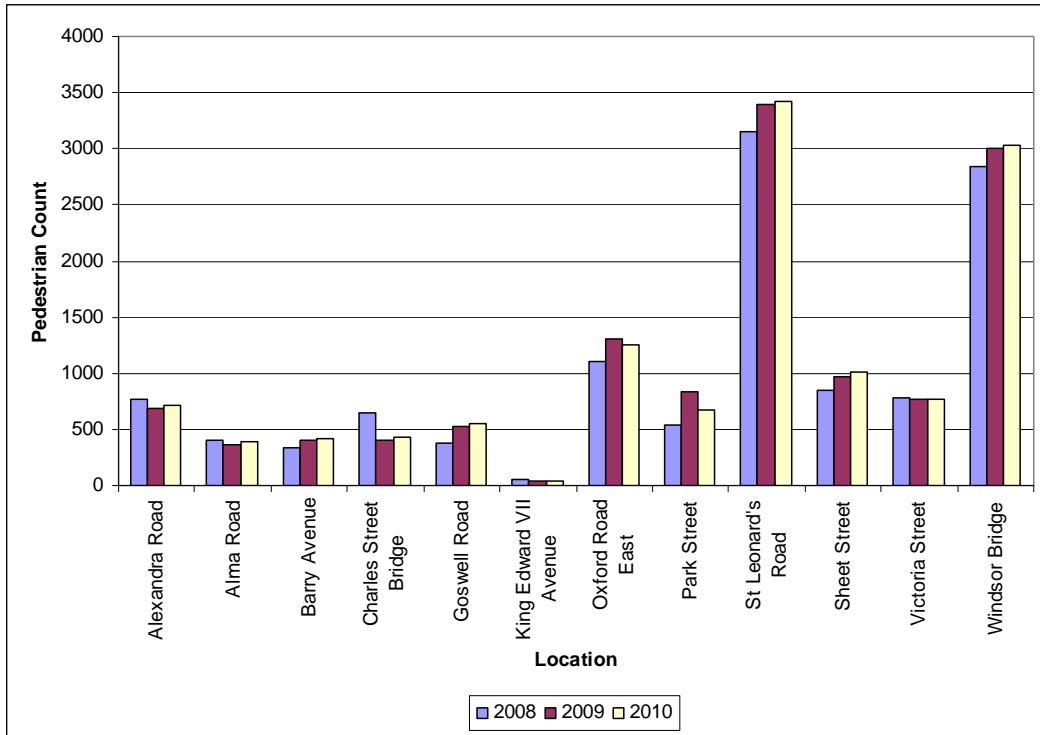
2.31 The cordon pedestrian counts were conducted weekdays from 7am – 7pm in September each year. They represent complete cordons around the town centre, and although each site was surveyed on a single day, the counts were spread over a number of days to minimise the impacts of day-to-day variability. Weather conditions were selected to be as consistent as possible. Figure 4 shows the distribution of footfall over a 12 hour period for pedestrians heading into Windsor town centre¹⁸.

¹⁷ 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.

¹⁸ 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.

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Figure 4: Inbound Pedestrians in Windsor (12-hour period)



(Source: RBWM)

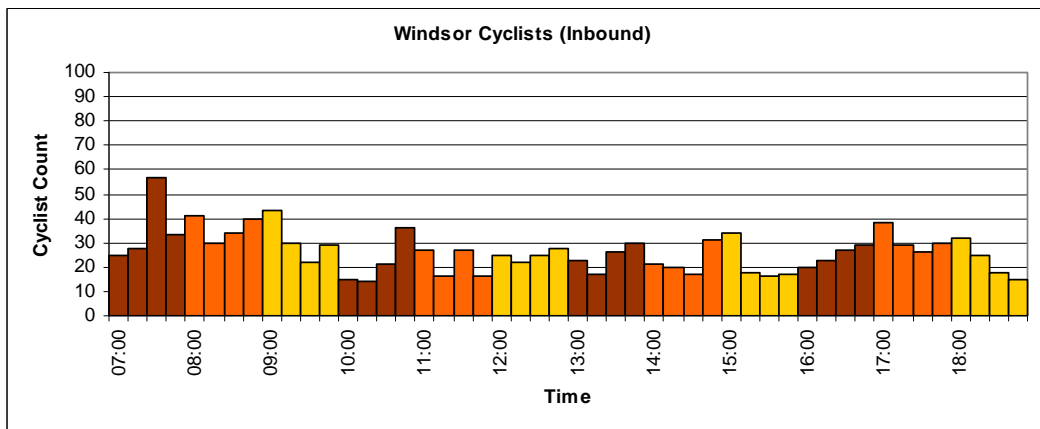
Cyclist Counts

2.32 Cyclist counts were conducted weekdays from 7am–7pm in September 2010. 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.

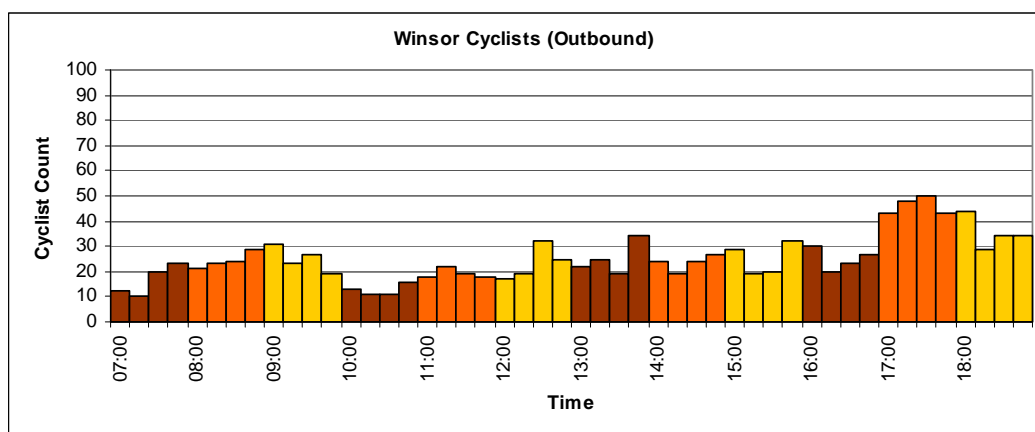
2.33 The peak flows follow commuter times, showing high counts in the mornings at 7-8am inbound and 5-6pm outbound (see the graphs in Figure 5). Interestingly an increased number of cyclists can be seen at around 3pm.

2.34 The cyclist counts provide a useful indication of how people access Windsor town centre. The highest count at any given time was 57 (inbound), but a pedestrian count (see figure 4) confirms that high numbers of people are in the town at the same time.

Figure 5: Cyclist Counts in Windsor September 2010



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(Source: RBWM Transport Surveys)

Accessibility

2.35 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 nature¹⁹.

2.36 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, where 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).

2.37 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.

2.38 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 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.

2.39 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 have been progressed, together with a new seasonal operation at Centrica. A 7-day operation from Windsor Racecourse is still proposed. Enhancements to the Legoland Park and Ride are being sought in connection with the proposed hotel development at the theme park.

2.40 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).

¹⁹ <http://www.windsor.gov.uk/site/visitor-information/travelling-with-a-disability>

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Table 8: Car Parking Available in Windsor (Prices at February 2011)

Site	Spaces	Type	Stay	Cost		
				1hr	2hr	3hr
Victoria Street	206	Multi-storey	Long	£1.20	£2.40	£3.50
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	£3.00	£4.50	£6.20
Thames Avenue	100	Surface	Long	Privately owned - prices not set by RBWM		
Alexandra Gardens	198	Surface	Long	£1.00	£1.80	£3.00
Windsor Library	15	Surface	Short	£2.00	£4.20	-
Windsor Dials *	250	Multi-storey	Long	£0.90	£1.80	£2.70
Alma Road	101	Surface	Long	£0.90	£1.80	£2.90
Windsor Leisure Centre **	249	Surface	Long	£0.60	£1.10	£2.00
York House *	92	Surface	Long	-	-	£2.50
Coach Park	74	Surface	Long	Coaches Only		
Eton Court **	57	Surface	Short	£0.90	£1.80	£3.00
Meadow Lane **	48	Surface	Long	£0.90	£1.80	£3.00
Romney Lock **	94	Surface	Long	£0.90	£1.80	£2.70
Home Park **	141	Surface	Long	£0.60	£1.20	£2.20
King Edward VII **	190	Surface	Long	£0.90	£1.80	£2.70

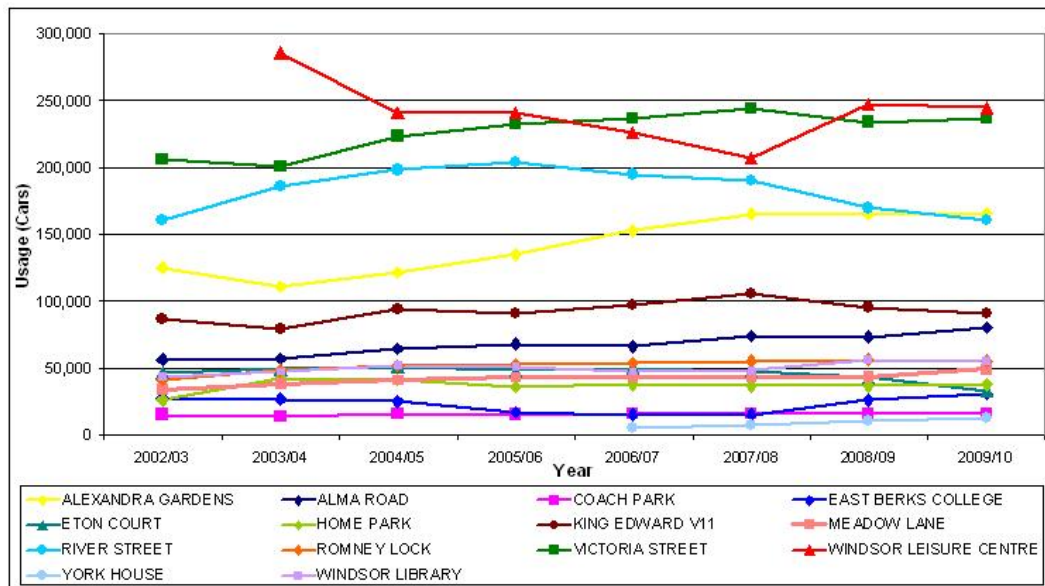
(Source: RBWM website) * Weekend parking only ** Outside of Town Centre

2.41 Information is collected on the usage of all car parks in the town centre by RBWM. Figure 6 shows that Windsor Leisure Centre, Victoria Street, River Street and Alexandra Gardens have seen the highest usage of all car parks in Windsor in the last 8 years. It is however important to caveat that the data does not account for the length of time spent in any car park, and nor does it account for the size of the car park. Therefore lower usage car parks may be primarily used by commuters (there a space is occupied all day), or be small in size, but with high turnover. Furthermore, there are a couple of privately owned car parks in Windsor that do not feature in figure 6.

2.42 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.

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Figure 6: Car park usage in Windsor over time



(Source: RBWM)

Public Perceptions

2.43 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. Caley's (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.

2.44 The Council is currently working with local communities to kick-start preparation on Neighbourhood Plans, whilst preparing a Borough Plan concurrently. Initial issues and ideas gathering workshops are being held around the borough, along with robust evidence base preparation to inform the technical and local approach to producing these development plans. The results of an options consultation in spring 2009 are broadly consistent with those found in earlier consultations, which will feed into these new development plans.

Perception of Safety & Occurrence of Crime

2.45 This information covers a twelve-month period for each crime year, which starts in April and ends in March²⁰.

2.46 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.

2.47 Windsor town centre is covered by two police beats, but this data is still a fairly apt representation of how people perceive safety within the centre during both day and night uses (see Table 9/ Figure 7).

²⁰ The historical statistics for Windsor and Maidenhead were sourced from Thames Valley Enterprise Information System – this system gathers data for management information and performance indicators. The recent statistics were obtained from the RBWM Community Safety Manager.

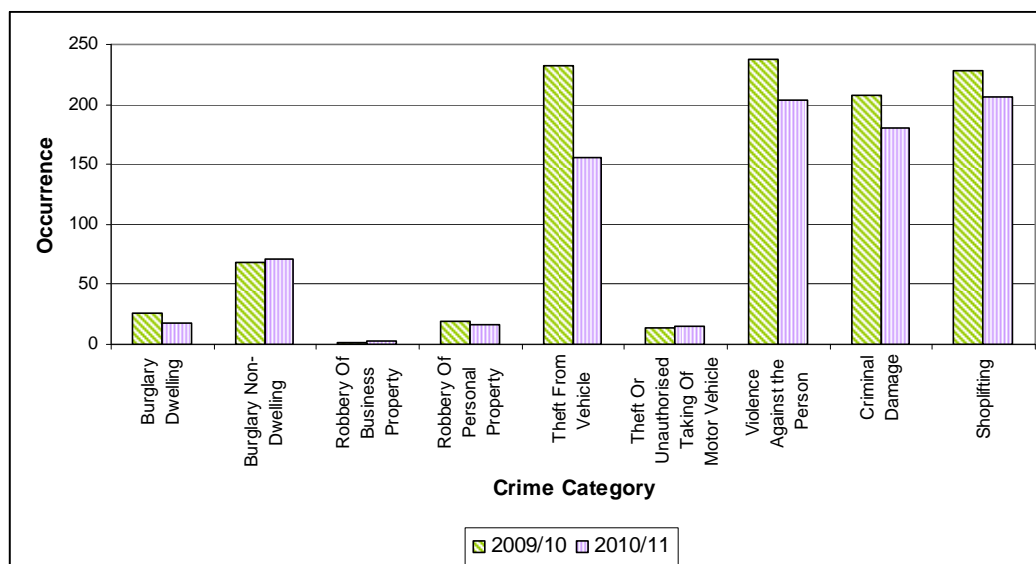
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Table 9: Occurrence of Crime by Category in Windsor*

Crime Category	2009/10	2010/11	Change	% Change
Burglary Dwelling	26	18	-8	-31%
Burglary Non-Dwelling	68	71	3	4%
Robbery Of Business Property	1	3	2	200%
Robbery Of Personal Property	19	16	-3	-16%
Theft From Vehicle	232	156	-76	-33%
Theft Or Unauthorised Taking Of Motor Vehicle	13	15	2	15%
Violence Against the Person	238	203	-35	-15%
Criminal Damage	208	181	-27	-13%
Shoplifting	228	206	-22	-10%
Grand Total	1033	869	-164	-16%

* Inner Windsor (the town centre) is comprised of 'Castle' and 'Town Centre' police beats.

Figure 7: Occurrence of Crime in Windsor Town Centre



(Source: RBWM Community Safety Manager)

2.48 Table 9/ Figure 7 show that overall Windsor has seen a decrease in crime in the last year, although long term trends cannot be reliably established from this dataset owing to only two years of data. The data in the graph above cannot be directly compared to the historical crime statistics below because different methods for collecting and collating the data have been used (this is demonstrated by the 2009/10 data in tables 9 and 10).

2.49 The most positive improvement was seen in 'Theft from a Vehicle' which saw 76 fewer crimes than during the previous year, although most crime categories saw a decrease in incidences compared to the previous year.

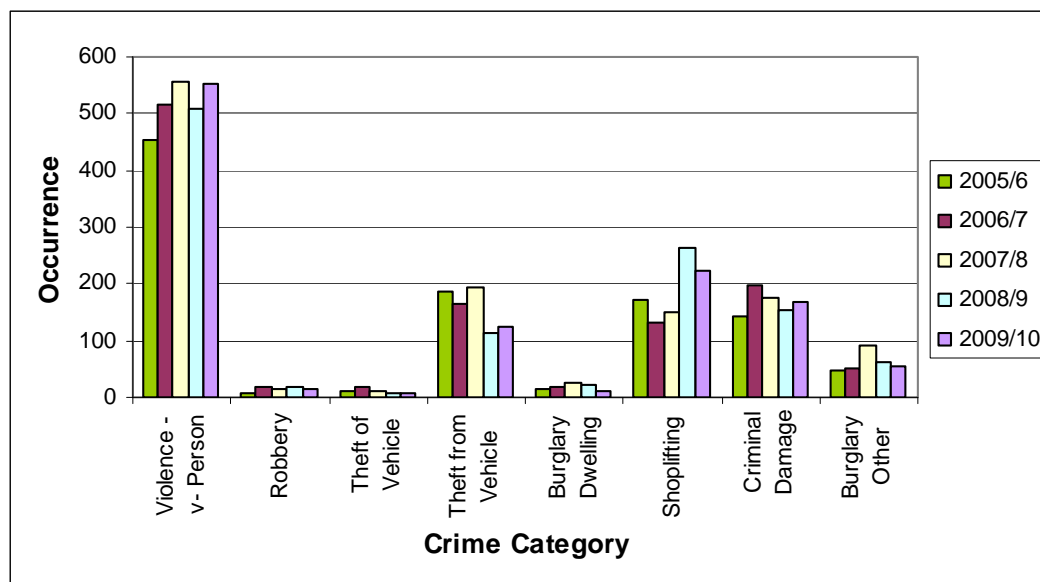
Table 10: Historical Crime Statistics for Windsor

Crime Category	Year ending March...							
	2003	2004	2005	2006	2007	2008	2009	2010
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

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Crime Category	Year ending March...							
	2003	2004	2005	2006	2007	2008	2009	2010
Criminal Damage	137	135	146	144	199	176	155	169
Burglary Other	87	99	70	49	51	91	64	56

Figure 8: Historical Crime Statistics for Windsor



(Source: Thames Valley Police)

2.50 Figure 8 shows that 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 subsequent increase in 2009/10 (based on historical data contained within table 10).

2.51 Policing priorities within Inner Windsor have been identified by the general public as: police visibility, anti-social behaviour, and burglary (in 2011).

Environmental Quality

2.52 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.

2.53 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.

2.54 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).

2.55 Windsor and Eton together were voted the top town in the UK in the 2008/09 national Clean Britain Awards (the scheme is held on a two year cycle)²¹. In the recent 2010/11 awards the town was awarded a five star award (although not placed) reflecting 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

²¹ <http://www.cleanbritainawards.co.uk/>

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signage, free Stubbi pouches for cigarette butts, abandoned shopping trolley retrieval and fast action against graffiti.

Conclusion

2.56 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 approximately half that of the current national rate (at February 2011).

2.57 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.

Maidenhead Town Centre Health Check

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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

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 in recent years to include Providence Place, Bridge Avenue and St. Ives Road. This includes the three additional units in the outer secondary shopping area which were added this year – 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 2011.

Table 11: Use Classes in Maidenhead Town Centre at February 2011

Use Class	2006	2007	2008	2009	2010	2011
A1	206	202	205	206	209	207
A2	41	38	42	42	41	41
A3	34	31	32	33	36	36
A4	13	13	13	12	12	12
A5	10	12	14	16	13	13
Sui Generis	-	-	-	-	11	11
Mixed Uses	-	-	-	-	-	3
Other	13	19	21	20	9	7
Total	317	315	327	329	331	330

(Source: RBWM Retail Surveys)

3.4 Since the 2010 survey there has been a decrease of one unit; two units were amalgamated along the Colonnade. The retail survey has also been amended to distinguish mixed uses.

3.5 The composition of shops has been ordered by three main definitions: Comparison, Convenience and non-retail Services. The proportions have remained similar year on year. Even accounting for Maidenhead town centre being smaller than Windsor, it still has proportionately fewer comparison shops. Comparison stores are located mainly in the

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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 22,820m² (this is based on the most recent Experian Goad surveys, with net comparison goods sales areas in the main food stores added)²².

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

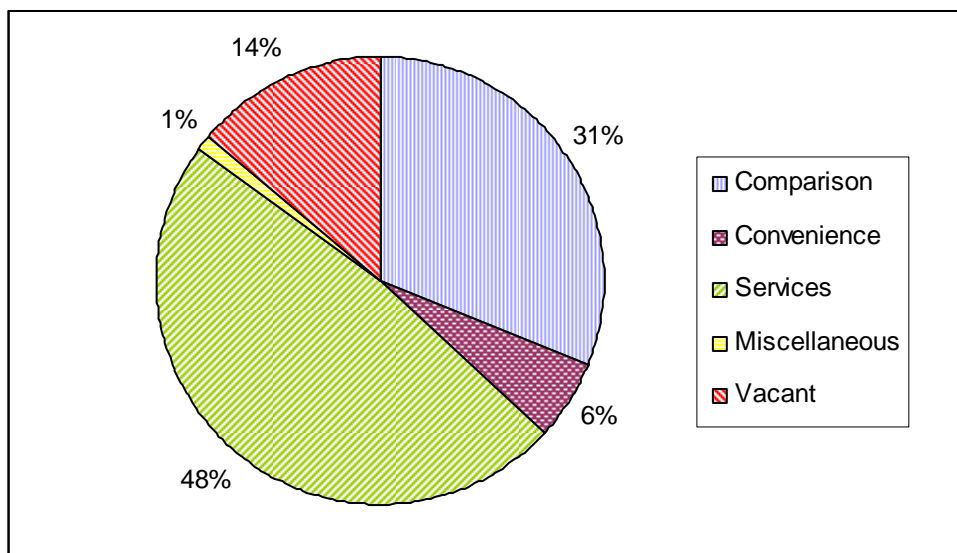
Table 12: Composition of Uses in Maidenhead Town Centre, February 2011

Type of Use	Number of Units Surveyed	Percentage of Overall Units
Comparison	102	31%
Convenience	19	6%
Services	158	48%
Miscellaneous	3	1%
Vacant	46	14%
Total:	328	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 9: Composition of Uses in Maidenhead Town Centre February 2011



(Source: RBWM Retail Surveys)

Retailer Representations and Intentions to Change

3.7 There are a good number of multiples represented within Maidenhead town centre including: Next, Top Shop, Boots, Tesco Metro (1,437m²), Sainsbury's (4,383m²), Waitrose (2,347m²), Peacocks, Marks and Spencer (1,073m²), W H Smith, Argos and New Look²³. Wilkinson has 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).

3.8 Using published EGI²⁴ 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.

²² Windsor and Maidenhead Retail Capacity Update 2009

²³ Floorspaces are for main food and convenience stores, taken from the Retail Capacity Update 2009

²⁴ EGI is the online property information service of the Estates Gazette Group.

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3.9 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 offices²⁵ (see the 'Looking to the Future' section for more information).

3.10 Table 13 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 13: 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 ²⁶
Mar 10	42	EGi

Shopping Rents

3.11 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 14 highlights the rental levels for Maidenhead over this period compared to neighbouring town centres.

²⁵ 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

²⁶ 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.

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Table 14: 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')

3.12 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 in 2009 were competitive compared to surrounding town centres in the same year, and higher than nearby Slough and Bracknell.

3.13 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

3.14 Table 15 shows vacancy rates collated from data collected during biannual retail surveys for Maidenhead. (*Temporary increase in vacancy levels due to redevelopment of Sainsbury's; ** Closure of three units within the Nicholsons Centre for expansion).

Table 15: 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%
Sep. 2010	11.2%
Feb. 2011	13.9%

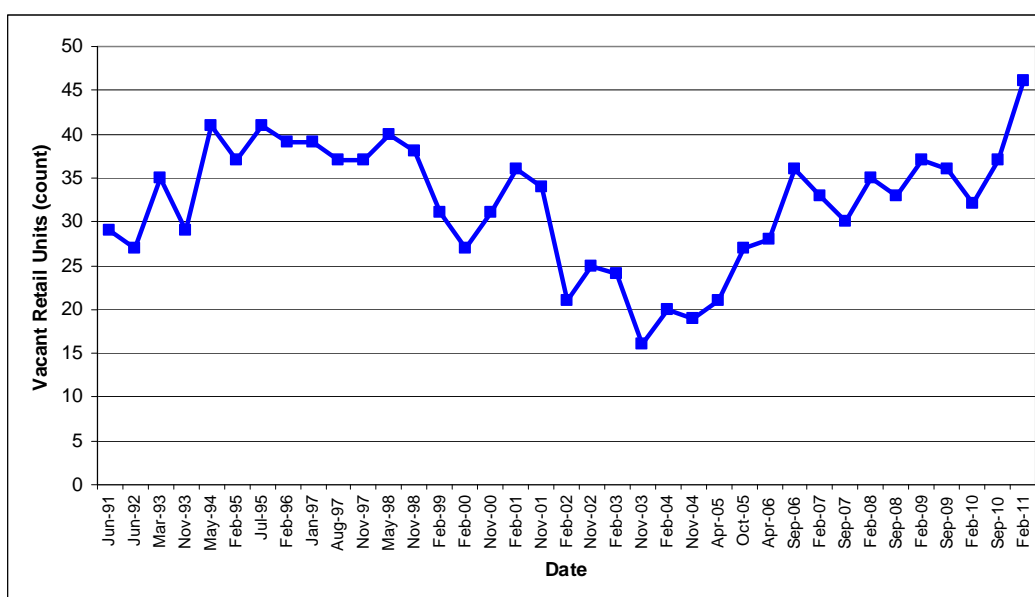
(Source: RBWM Retail Surveys)

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3.15 The most recent retail survey conducted by the Royal Borough (February 2011) shows there are 46 vacant units in Maidenhead Town Centre (13.9%). This is below the national average of 14.5%²⁷ (Colliers CRE state 13.7% nationally in October 2010)²⁸.

3.16 Historical vacancy rates in Maidenhead town centre since 1991 can be seen in Figure 10. 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 10: Historical Vacancy Rates in Maidenhead



(Source: RBWM Retail Surveys)

Commercial Yields

3.17 Table 16 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 2.23.

Table 16: Historical 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

²⁷ Shopping Centre February 2011 article http://www.shopping-centre.co.uk/news/fullstory.php/aid/4187/Vacancy_rates_update.html

²⁸ Colliers CRE 'Central London Retail Health Check Spring 2010'

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Date	Slough	Reading	Maidenhead	Windsor	Bracknell
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)

3.18 Maidenhead's retail property yields have remained high in comparison to other town centres in the region. However a recent trend has shown some improvement and the retail property yield for Maidenhead was at its lowest between January 2007 and 2008. No update was available at the time of publication.

Footfall Counts

3.19 Annual footfall surveys for Maidenhead have been undertaken by PMRS in October each year, the most recent survey being on Friday 1st and Saturday 2nd October 2010. The footfall is recorded at 30 sites. These records are available upon request from the Planning Policy Unit.

3.20 Table 17 and Figure 11 show pedestrian flows, which remained relatively consistent from 1996 with only minor changes. The biggest fluctuation was between 2003 and 2004 with an increase of 5,540. Footfall has decreased slightly since the 2008 footfall survey.

Table 17: 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
2009	-
2010	21.23

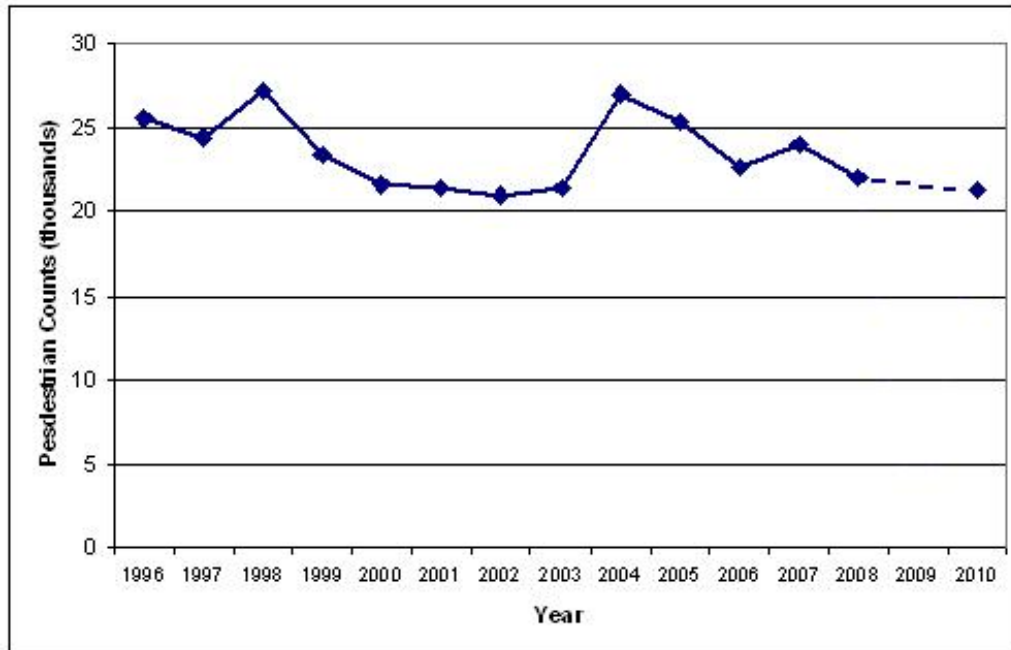
(Source: PMRS Footfall Survey)

NB. No footfall survey was conducted in 2009.

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

Maidenhead Town Centre Health Check

Figure 11: Footfall Trend in Maidenhead



3.22 The most recent pedestrian count taken in October 2010 shows that the highest pedestrian flow was recorded outside Marks and Spencer, the same as recent years, whereas the lowest pedestrian count is now found outside 4 Bridge Avenue. In these recent years the lowest count has been recorded along St. Mary's Walk, but the completion of the Sainsbury's and subsequent office redevelopment appears to have increased footfall in that area.

3.23 Using these pedestrian flow counts, the most popular thoroughfares are along the eastern part of the High Street extending between M&S and McDonalds, and the Nicholsons Centre itself.

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

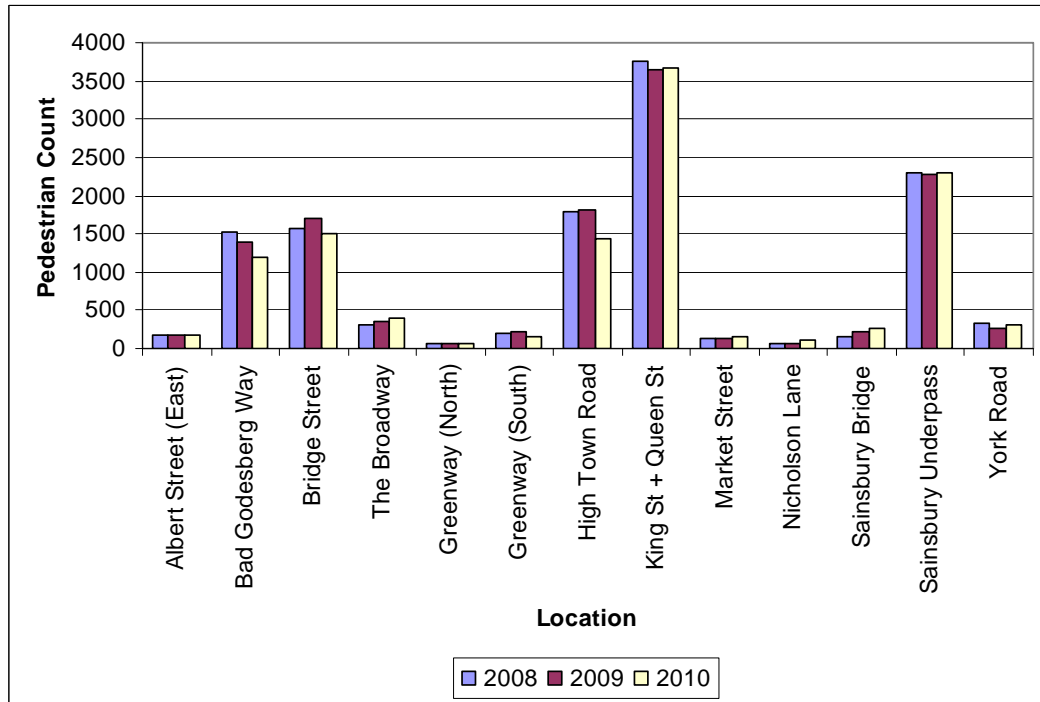
3.25 Figure 11 shows an overall decline in footfall in the centre from 2004/05 that is consistent with trends elsewhere (e.g. Windsor) so would tend to reflect changing market conditions rather than a declining centre.

3.26 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 12 shows the distribution of footfall over a 12-hour period for pedestrians heading into Maidenhead town centre²⁹.

²⁹ 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.

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



(Source: RBWM)

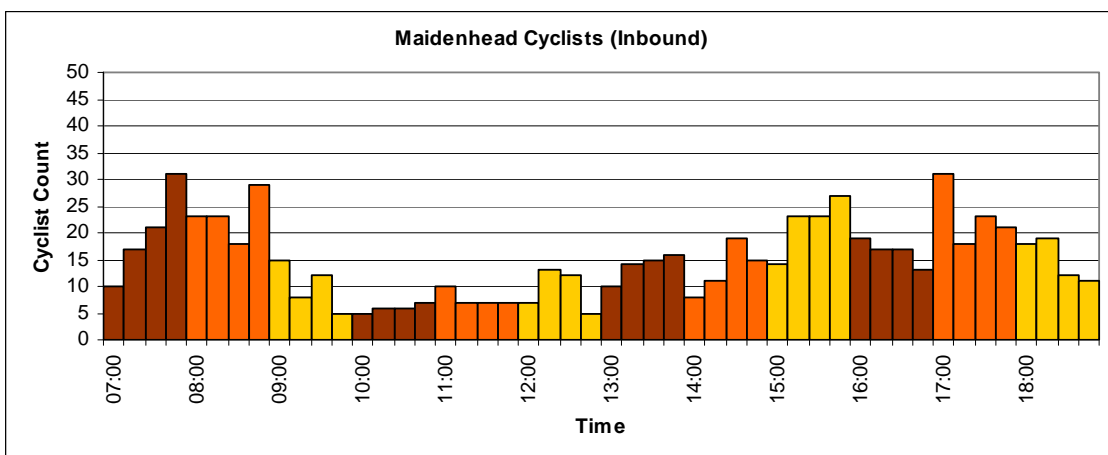
Cyclist Counts

3.27 Cyclist counts were conducted weekdays from 7am – 7pm in September 2010. 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.

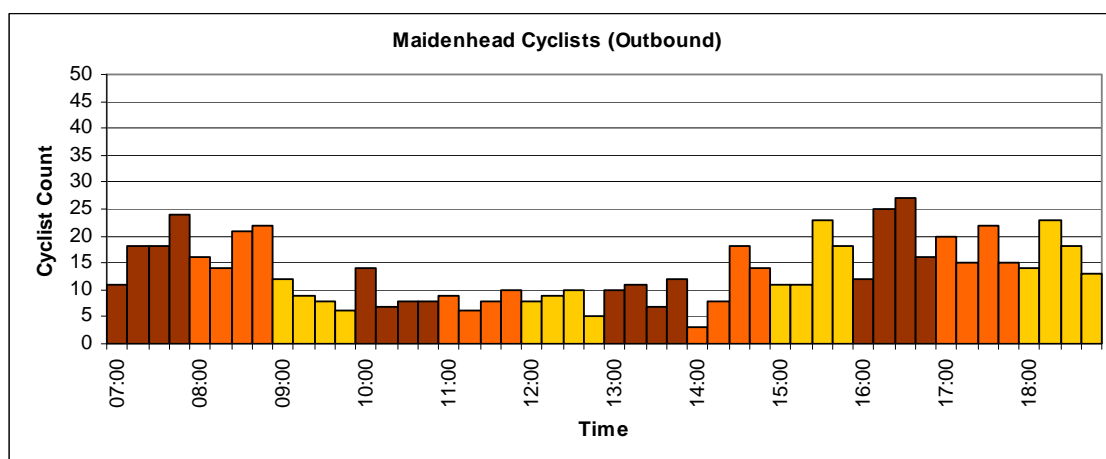
3.28 Peak cycle flows (inbound and outbound) reflect commuter times (see the graphs in Figure 13). Actual numbers of cyclists are surprisingly low for a town of Maidenhead’s size, indicating alternative transport is used. The highest count at any given time was 31 (inbound).

3.29 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 13: Cyclist Counts in Maidenhead September 2010



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(Source: RBWM Transport Surveys 2010)

Accessibility

3.30 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.

3.31 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.

3.32 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.

3.33 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.

3.34 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.

3.35 There are numerous long and short stay car parks in and around the town centre, which provide accessibility to car users (see Table 18). 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 18: Maidenhead Car Parking Prices (as at February 2011)

Site	Spaces	Type	Stay	Cost		
				1hr	2hr	3hr
Magnet Leisure Centre	248	Surface	Long	£0.80	£1.30	£2.00
Grove Road	82	Surface	Short	£0.80	£1.60	-

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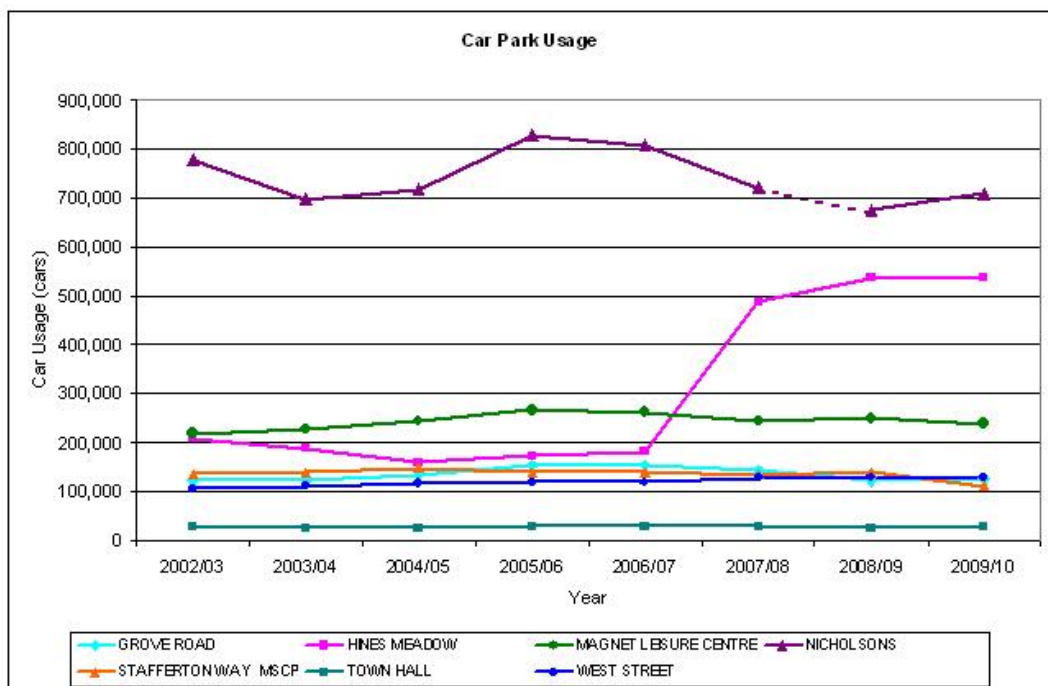
Site	Spaces	Type	Stay	Cost		
				1hr	2hr	3hr
Hines Meadow	1280	Multi-storey	Long	£0.80	£1.80	£2.50
Nicholsons	734	Multi-storey	Long	£1.00	£1.70	£2.00
Town Hall*	111	Surface	Short	£0.80	£1.50	£2.40
Stafferton Way**	576	Multi-storey	Long	£4.10	£4.10	£4.10
West Street	59	Surface	Short	£0.80	£1.50	£2.50

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

3.36 Information is collected on the usage of all car parks in the town centre by RBWM. Figure 14 shows that Nicholsons has the highest usage of all car parks in Maidenhead town centre, with Hines Meadow having seen an increase in usage since the redevelopment of Sainsbury's in 2007. It is however important to caveat that the data does not account for the length of time spent in any car park, and nor does it account for the size of the car park. Therefore lower usage car parks may be primarily used by commuters (there a space is occupied all day), or be small in size, but with high turnover.

3.37 In 2011, a parking study was carried out for Maidenhead Town Centre to assess the impact of the Maidenhead Town Centre AAP Opportunity Areas. There are 7 public car parks within Maidenhead Town Centre which equates to 3090 parking spaces during evenings and weekends. Current car parking usage in these car parks is around 156,000 purchased tickets per month. The study concluded that with the Maidenhead AAP promoting in the region of 1500 spaces across the opportunity areas, provision still adheres to the Council's policy in full. The study can be found on the Council's website³⁰.

Figure 14: Car Park Usage in Maidenhead



(Source: RBWM).

NB: The way data was collected for the Nicholsons Car Park changed between 2008 and 2009. The dashed line acknowledges this difference.

3.38 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/

³⁰ http://www.rbwm.gov.uk/public/pp_aap_car_parking_mtc_spring2011_document.pdf

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scooters) or an escort to accompany shoppers in need of extra assistance around the town centre. Shopmobility has been available in Maidenhead for approximately 15 years.

Public Perceptions

3.39 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 make the area feel unsafe and look untidy.
- Need a central focal point for the town, for instance a town square.

3.40 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.

3.41 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.

3.42 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.

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3.43 The Council is currently working with local communities to kick-start preparation on Neighbourhood Plans, whilst preparing a Borough Plan concurrently. Initial issues and ideas gathering workshops are being held around the borough, along with robust evidence base preparation to inform the technical and local approach to producing these development plans. The results of an options consultation in spring 2009 are broadly consistent with those found in earlier consultations, which will feed into these new development plans.

Perceptions of Safety & Occurrence of Crime

3.44 This information covers a twelve-month period for each crime year, which starts in April and ends in March³¹.

3.45 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.

3.46 Maidenhead town centre is covered by two police beats, but this data is still a fairly apt representation of how people perceive safety within the centre during both day and night uses (see Table 19/ Figure 15).

Table 19: Occurrence of Crime by Category in Maidenhead*

Crime Category	2009/10	2010/11	Change	% Change
Burglary Dwelling	16	13	-3	-19%
Burglary Non-Dwelling	74	52	-22	-30%
Robbery Of Business Property	2	1	-1	-50%
Robbery Of Personal Property	18	18	0	0%
Theft From Vehicle	69	42	-27	-39%
Theft Or Unauthorised Taking Of Motor Vehicle	6	6	0	0%
Violence Against the Person	120	99	-21	-18%
Criminal Damage	131	191	60	46%
Shoplifting	199	248	49	25%
Grand Total	635	670	35	6%

* Maidenhead Town Centre is comprised of 'Oldfield West' and 'Town Centre' police beats. (Source: RBWM)

3.47 In 2010/11 Maidenhead has seen a reduction in most of its crime types, including a reduction of violence against the person and theft from vehicle. There has however been an increase in criminal damage and shoplifting. Tackling these crimes is reflected in the policing priorities for the area.

3.48 The top three policing priorities identified by the public for the town centre are anti-social behaviour, shop theft and parking.

3.49 The historical statistics in Table 20 were obtained from Thames Valley Police.

³¹ The historical statistics for Windsor and Maidenhead were sourced from Thames Valley Enterprise Information System – this system gathers data for management information and performance indicators. The recent statistics were obtained from the RBWM Community Safety Manager.

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Figure 15: Occurrence of Crime in Maidenhead Town Centre

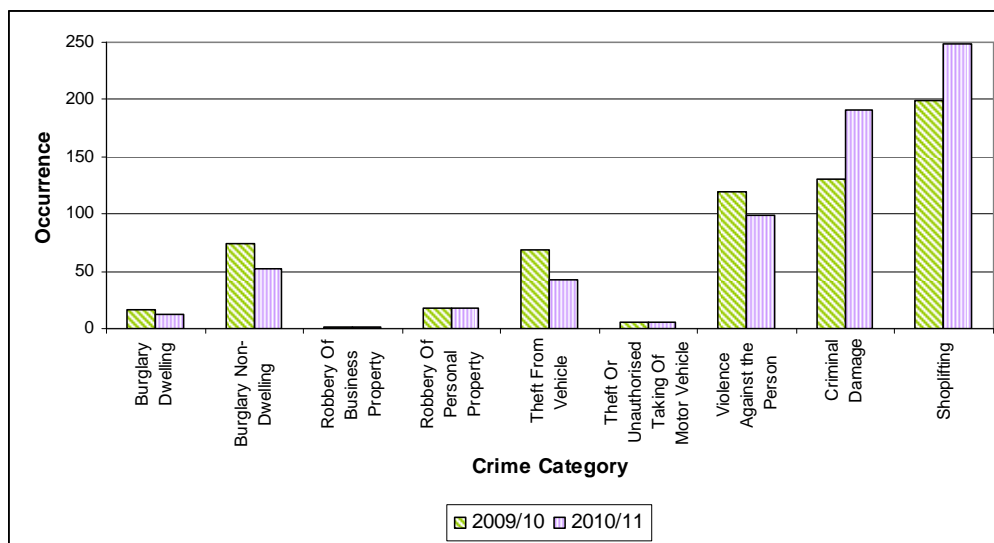


Table 20: Historical Crime Statistics for Maidenhead

Crime Category	Year Ending March...							
	2003	2004	2005	2006	2007	2008	2009	2010
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

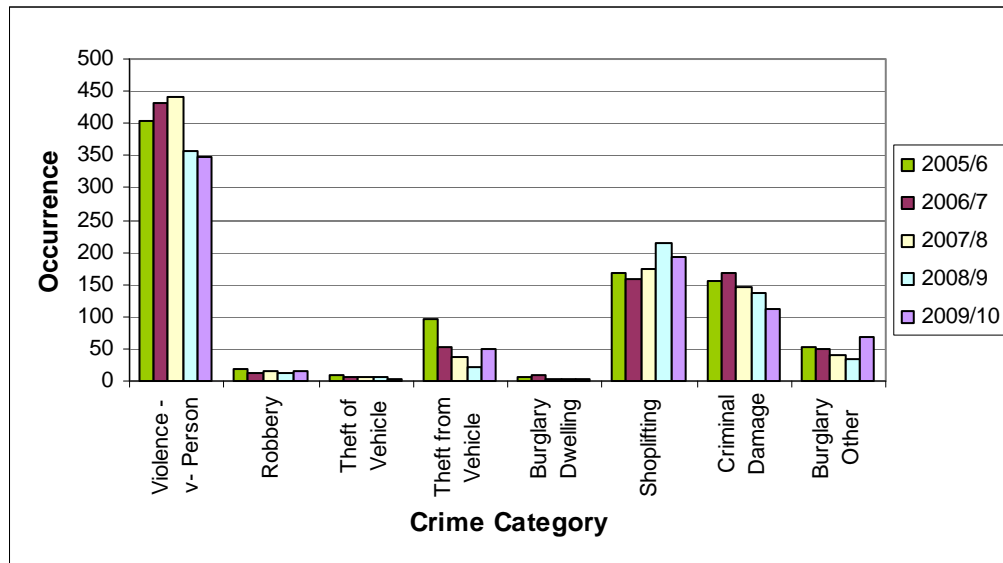
(Source: Thames Valley Police)

3.50 Historically, 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 increased in the last year. The data in the two graphs and tables cannot be directly compared because different methods for collecting and collating the data have been used (this is demonstrated by the 2009/10 data in tables 19 and 20).

3.51 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 Maidenhead Town Centre Health Check

Figure 16: Historical Crime Statistics for Maidenhead



(Source: Thames Valley Police)

Environmental Quality

3.52 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 tree planting 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.

3.53 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. In the last year new network signage in the form of monoliths, finger posts and subway signs have been installed around the town. New trees have also been planted along the High Street, with other trees re-potted and moved.

3.54 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.

3.55 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.

3.56 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.

3.57 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. The Maidenhead Area Action Plan aims to address many of these issues (see Looking to the Future section).

Maidenhead Town Centre Health Check

3.58 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.

3.59 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.

3.60 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.

3.61 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'³² 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.

3.62 Maidenhead was voted the second cleanest town in the UK in the 2010/11 national Clean Britain Awards (the scheme is held on a two year cycle)³³. 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.

Looking to the Future

3.63 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 groups³⁴. As part of its local planning strategy, the council has produced a planning brief – the "Maidenhead Waterways Framework", to guide future planning decisions along the waterway corridor³⁵.

3.64 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 regeneration³⁶. 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;

³² http://www.rbwm.gov.uk/public/pp_maidenhead_town_centre_conservation_area_statement.pdf

³³ <http://www.cleanbritainawards.co.uk/>

³⁴ www.maidenheadwaterways.org/

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

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

3 Maidenhead Town Centre Health Check

- Ensuring that its work on a Vision for the town centre runs parallel to and informs the new Local Development Framework.

3.65 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 town centre Area Action Plan (AAP) for the formal Local Development Framework process. Consultation on the AAP was carried out during 2010. Further studies have been conducted to support this work, including a 'Public Realm Strategy', 'Transport Modelling' and Retail Capacity Update. The AAP was examined by an Independent Inspector in March 2011 and was found sound by the Inspector in May 2011. The Council will formally adopt it as a Development Plan Document (DPD) in September 2011.



3.66 Finally, in June 2011, Maidenhead was named as one of the 3% of towns that is improving in the annual Colliers International Midsummer Retail Report 2011.

Conclusion

3.67 Maidenhead retail centre has scope to improve its status, but with the adoption of the Maidenhead AAP the first stage of regeneration has been secured.

3.68 In terms of vitality, the centre historically 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.

3.69 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 13.9%, but below the national average of 14.5%³⁷ (Colliers CRE state 13.7% nationally in October 2010); 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 whole³⁸.

3.70 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 is seen as a priority for the future. Footfall counts show that Maidenhead has seen a decrease in visitor attraction in recent years.

3.71 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.

³⁷ 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

³⁸ Colliers CRE National Retail Barometer (Retail Voids) Winter 2010 Report.

Health Check of Ascot and Sunningdale District Centres

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 Centres 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 m²). However this core area also provides specialist comparison goods stores, restaurants and financial services.

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

Diversity of Uses

4.6 Ascot – Biannual retail surveys are conducted in Ascot to record the usage of each retail unit. Maintaining accurate information is essential to ensure the composition of uses within Ascot retail centre remains as diverse as possible. Table 21 and Figure 17 show the composition of uses for this core area at February 2011.

Table 21: Breakdown of Ascot by Use Class at February 2011

Use Class	Number of Units Surveyed	Percentage of Overall Units
A1	30	60%
A2	10	20%
A3	4	8%
A4	2	4%
A5	0	0%
Sui Generis	2	4%
Mixed Uses	1	2%
Other	1	2%
Total	50	100%

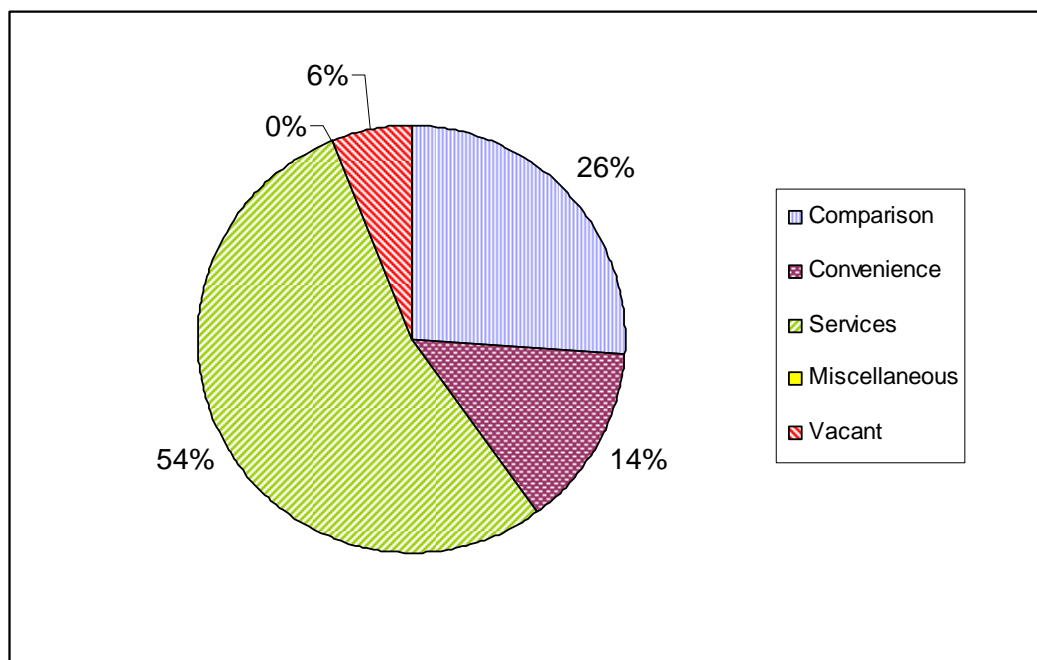
Health Check of Ascot and Sunningdale District Centres

Table 22: Composition of Uses in Ascot February 2011

Type of Use	Number of Units Surveyed	Percentage of Overall Units
Comparison	13	26%
Convenience	7	14%
Services	27	54%
Miscellaneous	0	0%
Vacant	3	6%
Total	50	100%

(Source: RBWM Retail Survey, February 2011)

Figure 17: Composition of Ascot District Centre February 2011



4.7 As illustrated in Figure 17, '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, newsagents, and more recently a Tesco Express. 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 1,600m² (this is based on the most recent Experian Goad surveys, with any net comparison goods sales areas in the main food stores added)³⁹.

4.10 Sunningdale – Biannual retail surveys are conducted in Sunningdale to record the usage of each retail unit. Table 22 provides information on the use classes with Table 23 and Figure 18 showing the composition of uses in the retail centre at February 2011.

³⁹ Windsor and Maidenhead Retail Capacity Update 2009

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Table 23: Use Class breakdown of Sunningdale, February 2011

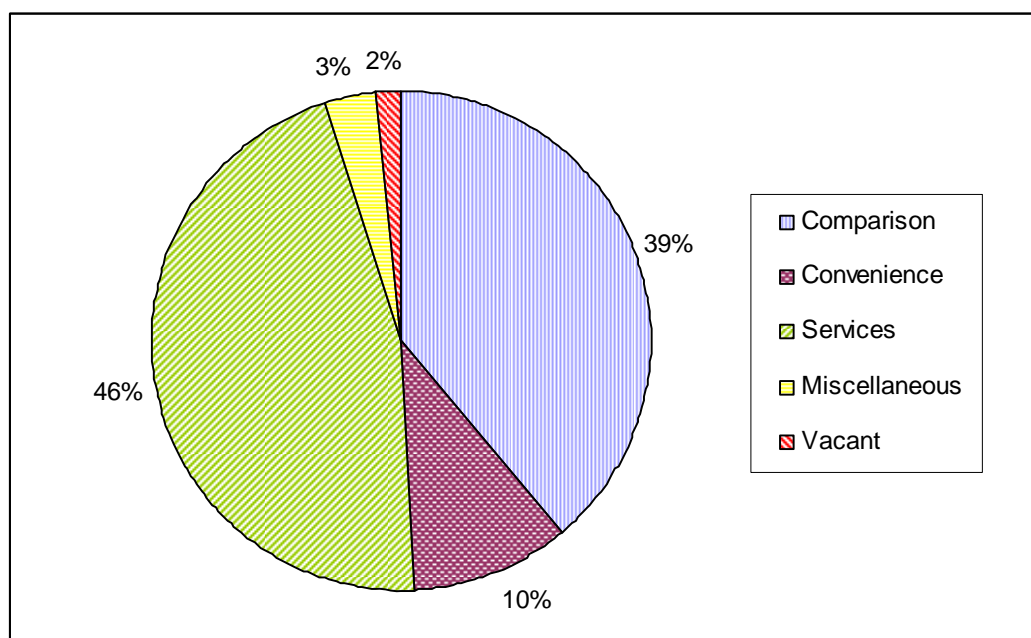
Use Class	Number of Units Surveyed	Percentage of Overall Units
A1	32	54%
A2	12	20%
A3	6	10%
A4	1	2%
A5	1	2%
Sui Generis	3	5%
Mixed Uses	1	2%
Other	3	5%
Total	59	100%

Table 24: Composition of Uses in Sunningdale, February 2011

Type of Use	Number of Units Surveyed	Percentage of Overall Units
Comparison	23	39%
Convenience	6	10%
Services	27	46%
Miscellaneous	2	3%
Vacant	1	2%
Total	59	100%

(Source: RBWM Retail Surveys, February 2011)

Figure 18: Composition of Uses in Sunningdale District Centre, February 2011



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

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Experian Goad surveys, with any net comparison goods sales areas in the main food stores added)⁴⁰.

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, Tesco Express 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. In late 2010 a Tesco Express opened along the High Street – this is not included in any of the calculations above.

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 2011 there were three vacant properties, equating to a 6% rate (see Table 22).

4.19 Sunningdale - During the last retail survey of Sunningdale in February 2011, there was one vacant unit in the centre. This equates to a vacancy rate of 2% (see Table 24).

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

⁴⁰ Windsor and Maidenhead Retail Capacity Update 2009

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are down. There are good footpaths on either side of the road, and electronic barriers at the railway crossing to maximise pedestrian safety.

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 currently working with local communities to kick-start preparation on Neighbourhood Plans, whilst preparing a Borough Plan concurrently. Initial issues and ideas gathering workshops are being held around the borough, along with robust evidence base preparation to inform the technical and local approach to producing these development plans. Each Neighbourhood Plan area is forming a Steering Group who lead on the production of the Neighbourhood Plan. The parishes of Ascot & Sunninghill and Sunningdale are working together, and have been awarded funding from central government to help in their plan preparations. Information on this Neighbourhood Plan can be found on their website at: <http://ascotandthesunnings.wordpress.com/>

4.29 The results of an options consultation in spring 2009 are broadly consistent with those found in earlier consultations, which will feed into these new development plans.

Perceptions of Safety and Crime

4.30 This information covers a twelve-month period for each crime year, which starts in April and ends in March⁴¹.

4.31 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

⁴¹ The historical statistics for Windsor and Maidenhead were sourced from Thames Valley Enterprise Information System – this system gathers data for management information and performance indicators. The recent statistics were obtained from the RBWM Community Safety Manager.

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character. This data is from both day and night, and therefore may not be a true reflection of crime issues during retail hours.

4.32 Ascot – There are two policing beat codes in the area, which are Central Ascot/ Sunninghill and South Ascot/ Racecourse.

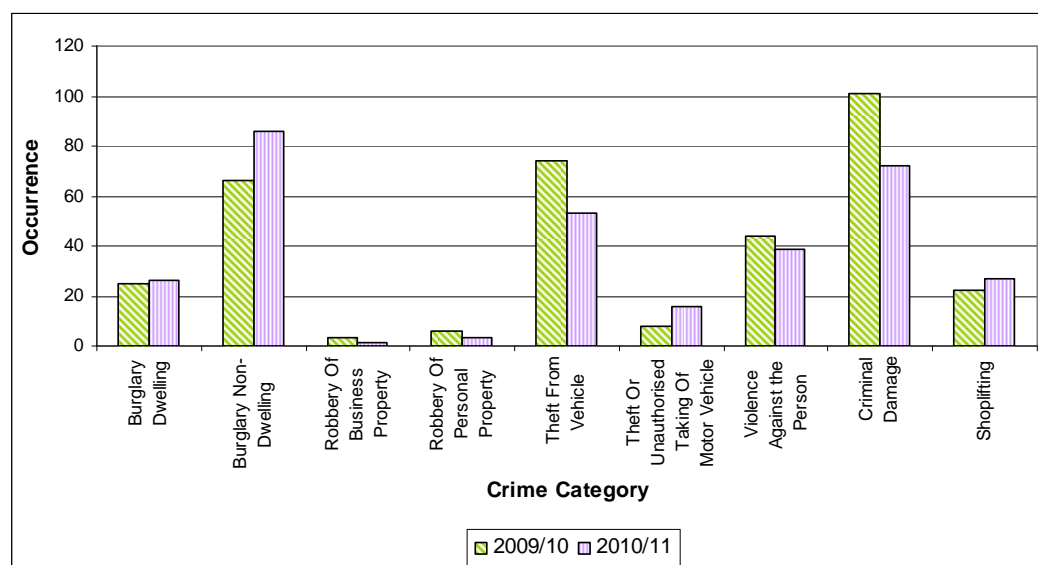
Table 25: Crime Statistics for Ascot

Crime Category	2009/10	2010/11	Change	% Change
Burglary Dwelling	25	26	1	4%
Burglary Non-Dwelling	66	86	20	30%
Robbery Of Business Property	3	1	-2	-67%
Robbery Of Personal Property	6	3	-3	-50%
Theft From Vehicle	74	53	-21	-28%
Theft Or Unauthorised Taking Of Motor Vehicle	8	16	8	100%
Violence Against the Person	44	39	-5	-11%
Criminal Damage	101	72	-29	-29%
Shoplifting	22	27	5	23%
Grand Total	349	323	-26	-7%

4.33 Overall most types of crime in Ascot have seen a decrease in 2010/11 compared to the previous year, however long term trends cannot be established from this new dataset. Theft (both shoplifting and burglary) has increased in the last year.

4.34 The data in the two graphs and tables for Ascot cannot be directly compared because different methods for collecting and collating the data have been used.

Figure 19: Crime Statistics for Ascot



4.35 Historically, there were four policing beat codes in the Ascot area: 1) Sunningdale; 2) Central Ascot/ Sunninghill/ Cheapside; 3) South Ascot/ Racecourse and 4) Blythwood. The South Ascot/ Racecourse beat incorporates Ascot High Street, the area of interest in this report.

Table 26: Historical Crime Statistics for South Ascot/Racecourse

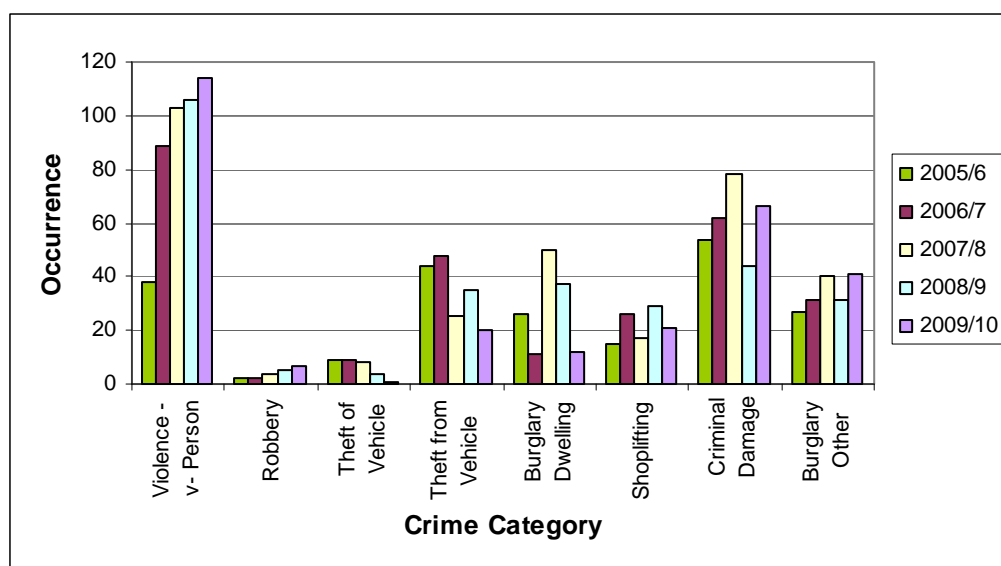
Crime Category	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10
Violence -v- Person	34	59	58	38	89	103	106	114
Robbery	6	3	3	2	2	4	5	7
Theft of Vehicle	14	17	15	9	9	8	4	1

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Crime Category	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10
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)

Figure 20: Historical Crime Statistics for South Ascot/Racecourse



4.36 Historical data shows that 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.

4.37 Sunningdale – There is only one police beat for Sunningdale.

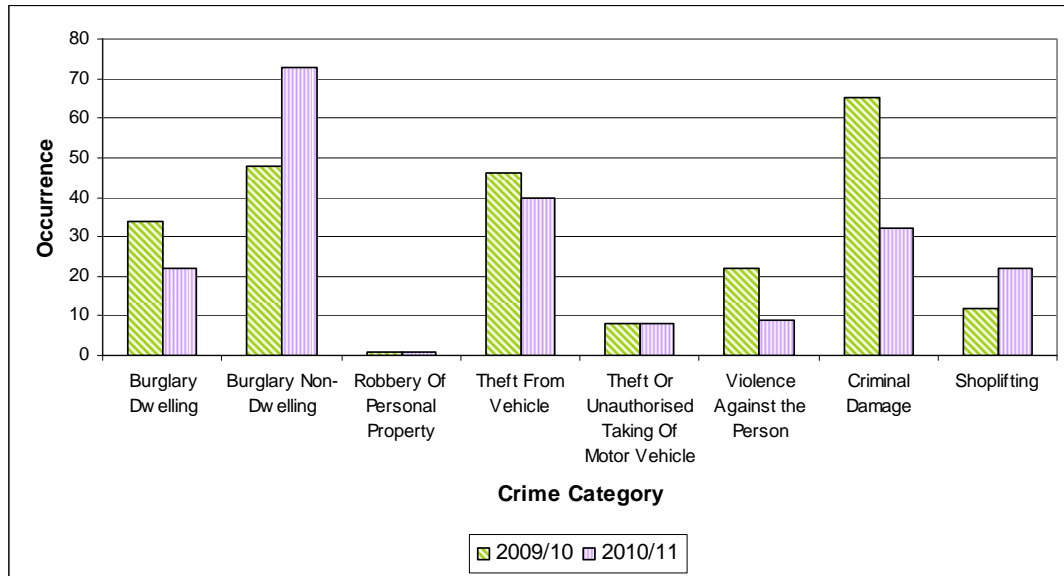
4.38 Table 27 and figure 21 show that overall Sunningdale has seen a significant drop in crime (12%).

Table 27: Crime Statistics for Sunningdale

Crime Category	2009/10	2010/11	Change	% Change
Burglary Dwelling	34	22	-12	-35%
Burglary Non-Dwelling	48	73	25	52%
Robbery Of Personal Property	1	1	0	0%
Theft From Vehicle	46	40	-6	-13%
Theft Or Unauthorised Taking Of Motor Vehicle	8	8	0	0%
Violence Against the Person	22	9	-13	-59%
Criminal Damage	65	32	-33	-51%
Shoplifting	12	22	10	83%
Grand Total	236	207	-29	-12%

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Figure 21: Crime Statistics for Sunningdale



4.39 The most notable reduction between 2009/10 and 2010/11 in Sunningdale (see figure 21) was less violence against the person and criminal damage. However shoplifting has seen a significant increase compared to 2009/10.

4.40 The historical 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. As with the datasets for Ascot, the current and historical cannot be compared due to different methods for collecting and collating the data that have been used.

Table 28: Historical Crime Statistics for Sunningdale

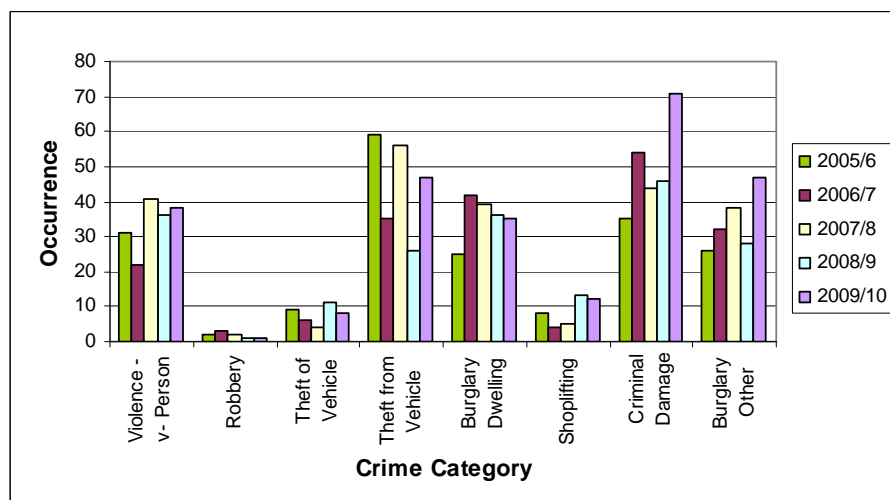
Crime Category	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10
Violence -v- Person	34	31	31	31	22	41	36	38
Robbery	2	3	1	2	3	2	1	1
Theft of Vehicle	10	10	10	9	6	4	11	8
Theft from Vehicle	57	75	48	59	35	56	26	47
Burglary Dwelling	43	42	18	25	42	39	36	35
Shoplifting	10	9	4	8	4	5	13	12
Criminal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

(Source: Thames Valley Police)

4.41 Policing priorities for Ascot, Sunningdale and Sunninghill neighbourhoods have been identified as burglary, anti-social behaviour and police visibility (in 2011). 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.

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Figure 22: Historical Crime Statistics for Sunningdale



Environmental Quality

4.42 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.

4.43 Improvements have been made to the facades along the High Street by removing the former concrete façade and replacing it with fresh wooden cladding. This has enhanced the aesthetic environmental quality of the area.

4.44 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.

4.45 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.

4.46 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

4.47 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.

4.48 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.

4.49 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.

4.50 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.

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4.51 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.

Local Centres and Parades

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 29. Percentage A1 is based on all recorded units including ‘other e.g. D1 uses’. Vacancy is based on retail units only.

Table 29: Local Centres and Parades in the Borough at February 2011

Local Centres and Parades		% A1 (of total units)	% Vacant (of total retail units)
Cookham	• Cookham Village	65%	5%
	• Cookham Rise	59%	3%
Datchet		59%	12%
Eton	• Eton High Street	63%	7%
	• Eton Wick	77%	0%
Holyport		100%	0%
Maidenhead Area	• Bridge Road	56%	0%
	• Shifford Crescent	83%	0%
	• Gloucester Road	67%	0%
	• Cookham Road	50%	13%
	• St Mark's Road/ Crescent	79%	5%
	• Wootton Way	86%	13%
	• Highway Avenue	100%	0%
	• Farm Road	80%	0%
	• Hampden Road	67%	0%
	• Ross Road	60%	0%
	• Wessex Way	64%	0%
	• Woodlands Park	64%	0%
Old Windsor		55%	13%
South Ascot		65%	0%
Sunningdale	• Silwood Road	38%	13%
Sunninghill		58%	3%
Windsor Area	• St Leonards Road	55%	5%
	• Clewer Hill Road	63%	0%
	• Clarence Road/ Dedworth Road	55%	9%
	• Vale Road/ St Andrews Avenue	52%	0%
	• Dedworth Green	47%	0%
	• Dedworth Road	56%	0%
Wraysbury		65%	8%

5.3 At the time of the last survey (February 2011) all the local retail centres appeared healthy with low vacancy (most 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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