



# **Retail and Town Centre Study 2015**

The Royal Borough of Windsor and Maidenhead

FULL DRAFT REPORT

April 2015

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# 1. Introduction

The Royal Borough of Windsor and Maidenhead (RBWM) has commissioned DTZ to prepare a new and up-to-date Retail and Town Centre Study for the Borough. The purpose of this Study is to assess the qualitative and quantitative needs for retail development over the plan period to 2031. It replaces the *2009 Retail Capacity Update* (also prepared by DTZ).

This Study focuses on Windsor and Maidenhead Town Centres, and Ascot and Sunningdale District Centres. It has been prepared in the context of a number of events and forecasting parameters, including:

- The publication of the National Planning Policy Framework (NPPF) – and subsequently the National Planning Practice Guidance (PPG) – which requires local planning authorities to plan for growth and allocate sites for retail development based on a robust and up-to-date evidence base;
- The evolution of the retail landscape and the implications for town centres;
- The impact of the recent recession on shopping habits and future shop floorspace capacity (the capacity forecasts outlined in this Study are based on a new 2015 household interview survey of shopping patterns);
- Increasing and diversifying competition in the retail sector; and
- Changes in retailers' sales densities.

For clarity, the remainder of this Study is structured as follows:

- **Section 2: Trends in Retailing and Commercial Leisure** – we describe the recent and emerging trends across the UK, and their implications for the Borough's centres.
- **Section 3: Healthcheck Assessments** – we assess the vitality and viability of the Borough's centres based on a series of healthcheck indicators.
- **Section 4: Basis of Retail Capacity Forecasts** – we describe the basis of our retail capacity forecasts, and the data inputs and assumptions on which these are based.
- **Section 5: Quantitative Capacity for New Retail Development** – we set out and describe the up-to-date retail capacity forecasts for the Borough.
- **Section 6: Review of Potential Development Opportunities** – we undertake a commercial review of potential sites in the Borough for new retail development.
- **Section 7: Conclusions** – we provide an overview of our principal findings and the implications for retail planning and development in the Borough.

## 2. Trends in Retailing and Commercial Leisure

### 1.1 NATIONAL TRENDS

According to the British Council of Shopping Centres (BCSC), for every 100 jobs created in the retail sector nationally, it is estimated an additional 50 indirect jobs will be created in other sectors<sup>1</sup> relating to supply chains, services, e-commerce, logistics, etc. The retail sector is therefore an essential contributor to the UK economy with £321bn of retail sales in 2013; and a key driver of activity in town centres such as Windsor and Maidenhead.

The retail sector – and town centres across the UK – is in a period of rapid change. In this section, we comment in broad terms on the national trends in retailing and commercial leisure; and the implications for town planning and development in the Borough (specifically in the town/district centres but also in the Borough's local centres). To that end, we consider the following factors:

- The growth of internet shopping;
- Retailer polarisation (and downsizing);
- Changing store formats and retail sales densities;
- Increasing importance of leisure uses;
- Mix of uses including the balance between multiple and independent retailers;
- Providing a high quality experience and environment.

#### 1.1.1 The growth of internet shopping

Internet shopping has experienced rapid and significant growth since the late 1990s. DTZ Research estimate that 15.7% of total UK retail sales will be conducted through online channels by 2019<sup>2</sup>.

Information for the UK published by Verdict Research Limited in 2013 includes estimates, and trend-based forecasts, of e-retail sales for both comparison (i.e. non-food) and convenience (i.e. food) retail goods. Verdict predicts that total online sales of all comparison goods will have increased by 6.5% between 2010 and 2015 to 18%. For some categories of comparison goods (i.e. music & video) the proportion of total UK retail sales accounted for by internet shopping was already substantial in 2010 (55.2%), and is expected to become much more (93.4%) this year. Other categories of comparison goods, Verdict predicts, are likely to have experienced limited growth over the same period (0.9% in the case of DIY & gardening goods). In

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<sup>1</sup> Autumn Statement Submission (BCSC, 2014).

<sup>2</sup> DTZ Insight: E-tailing and logistics (DTZ, 2014).

terms of convenience goods, Verdict predicts that total online sales of such goods (i.e. food & grocery) will have increased by 2% between 2010 and 2015 to 5.8%.

More up-to-date information published in Pitney Bowes 'Retail Expenditure Guide<sup>3</sup> 2014/15' forecasts that total non-store retail (including online) sales of comparison goods will increase from 18.9% in 2015 to 22.7% by 2021. In terms of convenience goods, Pitney Bowes forecast a relatively modest increase in such sales from 7.2% in 2015 to 8.4% by 2021. We have made an allowance for Special Forms of Trading (including internet shopping) in our retail capacity forecasts set out and described in section 5 of this Study.

While it is difficult to accurately predict how these factors may continue to impact on retailer portfolios in terms of the quantum of retail space, we summarise below some of the possible implications for town planning and development:

- Some of the larger retailers are increasingly focusing on a smaller number of core locations for their store portfolios, where they can have flagship-type stores and attract the most affluent and extensive catchments (as discussed below in further detail).
- Some retailers, such as foodstore operators, operate online sales from their traditional stores and thus the growth of internet shopping does not necessarily mean a reduction in the need for retail space.
- While the larger, national and international retailers are investing in online retail channels, this is not necessarily the case with small, independent retailers and high street businesses. According to the 'Digital High Street 2020' report<sup>4</sup> the internet has created 'digital economy' demands and opportunities, which should be embraced by all retailers and businesses and, importantly, town centres if they are to be successful and compete. The extent to which town centres develop their digital capabilities, and other solutions such as traffic management, is likely to have spatial implications for high streets.
- Retailers will not only have to continue to adapt their online retail channels, but adapt their distribution and logistics infrastructure to meet the demands of increased home delivery and collection methods (a likely consequence of which is a reduction in retail space requirements).
- Greater collaboration between retailers in terms of sharing retail space (such as the Sainsbury's and Argos case example discussed below), and between shopping centre landlords and their retailer tenants in the provision of collection points and/or lockers<sup>5</sup>. Innovative collection arrangements are also being introduced at railway stations and other public places (i.e. not on the traditional high street).

The town centres that can offer a wider, all-round experience to shoppers and other users are likely to be better positioned than others in terms of countering the challenges of internet shopping and its associated implications for town centres. Attractions such as a good quality leisure offer may help, since one cannot

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<sup>3</sup> Broad Definition and Central Case, Oxford Economics (Table 3.1).

<sup>4</sup> 'Five-year plan for high street rejuvenation', The Planner, RTPI (10 March 2015 edition).

<sup>5</sup> 'Alive and Clicking', Modus, RICS (December 2014 / January 2015 edition).

visit a leisure attraction over the internet. This is discussed in further detail below. Other attractions may include a good quality independent retail offer, and/or a public realm with good quality seating and other street furniture. Essentially, however, it is shops that attract shoppers and therefore the priority for the Council should be retaining (and attracting) as many shops, and thus shoppers, together with catering and other leisure uses, and other service businesses, as possible in this changing retail landscape.

### 1.1.2 Retailer polarisation (and downsizing)

Retailing is ever-evolving, with retailers entering and exiting the market on a regular basis. Some of this change is due to the spate of retailer administrations since the economic downturn (with Clinton Cards, Comet, Game, Habitat, JJB Sports and Woolworths to name a few), leaving major voids within town centres and retail parks. Lease expiries are another contributor, with the BCSC<sup>6</sup> commenting that the period between 2012 and 2015 will see “a significant number of retail leases expire as 25 year leases agreed in [the late 1980s and early 1990s] and more recently agreed sub-10 year leases all reach maturity.” This trend is likely to drive store rationalisation as retailers seek to adjust their requirements for the multi-channel environment.

A further significant, recent change has been the strategy of new retailers entering the UK market and their approach to store expansion and coverage. This change is driving demand in a smaller number of larger, prime locations and at a time when there is an overall reduction in multiple retailer representation across the UK.

New international retailers are still entering the UK market; however they are increasingly selective about their store coverage. Major retailers to enter the UK in the past five years include Hollister, Forever 21, Victoria's Secret, J.Crew and Aeropostale. Such retailers have, or are seeking, stores in London (often a flagship store with multiple satellite stores) and the next 10-15 major cities including the likes of Glasgow, Liverpool and Manchester. At this point, they have looked to increase their geographical spread across Europe (to similarly major cities) as opposed to achieving more concentrated coverage in the UK. This contrasts with the typical strategy of international retailers 15-20 years ago, when they would seek greater coverage across the UK before moving to the next market.

These strategies can be witnessed in the example of the upmarket fashion retailer Banana Republic and its parent company, Gap (more of a mid-market retailer). Banana Republic opened its first UK and European store in 2008 with a flagship offering on Regent Street, in the heart of the West End of London. Since then, only an additional eight stores have been opened; six of which are in prime retail areas of London. The other two stores are in prime regional shopping locations, namely Bath and Manchester's Trafford Centre. By comparison, Gap opened its first UK store in London in 1987. Since then, it has opened around 140 additional stores in the UK; this equates to around five stores per year.

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<sup>6</sup> Beyond Retail (BCSC, 2013).

This example illustrates the wider trend of polarisation between prime retail locations and the more secondary locations. Most existing, major retailers in the UK either have or are in the process of exiting large numbers of non-prime stores; so as to concentrate on stores with larger, more affluent catchments and better opportunities for e-commerce. This structural change has been driven considerably by the impact of the recession and the growth of internet shopping. There is a significant quantum of secondary/tertiary retail space on the UK's high streets that – as predicted by the BCSC<sup>7</sup> back in 2012 – is no longer fit for purpose for modern multiple retailers.

Furthermore, service-based retail uses (i.e. financial services, travel agents) have seen a gradual contraction in store numbers since the onset of the recession, and the continued growth of internet alternatives which provide convenient access to online banking and holiday price-comparison websites. For example, Thomas Cook closed 149 stores in the 12 months from September 2011 to 2012 and this downsizing has continued throughout the travel agency sector, with a reported 45% year-on-year rise in closures in April 2014<sup>8</sup>. This form of structural change has consequences for footfall and consumer spending, most notably in the secondary locations which are more dependent on retail-related service uses.

The trend towards right-sizing has led retailers and investors to target the most defensible locations, where footfall and consumer spending is most resilient to economic changes. As a result, there is increasing uncertainty as to the sustainability of over-supplied secondary locations. Windsor and Maidenhead Town Centres fall within the bracket of commercially secondary locations, owing to their relative size and limited catchment areas; and are therefore at risk from such trends which are now affecting more and more larger centres, as retailers become increasingly selective and polarise towards fewer, prime retail locations.

### 1.1.3 Changing store formats and retail sales densities

Retailing is changing, with new formats emerging in recent years as an alternative to traditional retail space; much of which is now surplus to requirements. Modern multiple retailers demand flexible, more efficient retail space of a sufficient size to showcase their brand(s) in prime retail locations. This is largely in response to the growth of internet shopping and the increased use of smart phone technology (i.e. Apps) and social media (i.e. Facebook, Twitter). Much of the redundant retail space is in commercially secondary or tertiary shopping areas in large centres, or in smaller town and district centres.

Retailers are increasingly refurbishing their existing stores to accommodate click-and-collect services, whereby customers can collect and return their goods ordered online. Major retailers such as Argos, John

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<sup>7</sup> The Rise and Rise of Multi-Channel Retailing (BCSC, 2012) estimated that almost 20% of UK retail space could be surplus to modern retailer requirements in its current form.

<sup>8</sup> BBC News (14 April 2014).

Lewis, Marks & Spencer<sup>9</sup> and Next – as well as smaller, specialist retailers like Hobbycraft and Specsavers – are incorporating click-and-collect services into their stores, thus cutting out the expensive ‘final mile’ of delivery. Mintel Retail Rankings 2014 reports that one in eight online purchasers now use some form of collection service; while the RICS ‘Modus’ journal<sup>10</sup> indicates that 2015 will see, for the first time, sales of goods brought online but collected in store outstrip home deliveries.

In a further development, designed to reflect changing shopping habits and the increasing focus on e-commerce, Argos is introducing new digital-concept stores; where tablets replace the traditional catalogues and paper forms. The same high street retailer has also recently announced plans to open 10 new digital-concept stores within existing Sainsbury’s superstores<sup>11</sup>.

Major retailers, for example Next, are pursuing new all-product out-of-centre store formats, providing a substantially expanded range of comparison goods (often including but not limited to clothing and footwear, furniture and soft furnishings, domestic appliances and DIY goods) and surface level car parking. Such stores, which require extensive showroom floorspace, enable the retailer to showcase their full range of products. These can be purchased online and collected via click-and-collect services. Meanwhile, John Lewis has opened smaller store formats with the click-and-collect option for their full range of products in locations such as Exeter, York and Ipswich. The same is true of House of Fraser in Aberdeen and Liverpool<sup>12</sup>.

A key trend in the grocery sector in recent years is the strong performance and growth of the hard discounters such as Aldi and Lidl, which have fuelled the ‘price war’ with mainstream operators. Combined, Aldi and Lidl currently command a market share of around 9%; and this is set to increase with Aldi, for instance, targeting 80 new stores in the UK per annum over the next 10 years.

The growth of C-store formats (namely Tesco Express, Sainsbury’s Local, Morrisons M-Local and Little Waitrose) is another key trend, driven by the customer’s demand for convenience and, in turn, operators seeking to enhance their market shares of ‘top up’ food shopping in a highly competitive environment. According to Mintel Retail Rankings 2014, the number of such UK stores<sup>13</sup> has increased as follows:

- Tesco Express – 1,130 in 2010 to 1,547 in 2013 (37% increase)
- Sainsbury’s Local – 335 in 2010 to 523 in 2013 (56% increase)
- Little Waitrose – 4 in 2010 to 36 in 2013 (800% increase)

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<sup>9</sup> Marks & Spencer in Maidenhead Town Centre is an example of a store to incorporate click-and-collect services off West Street.

<sup>10</sup> ‘Alive and Clicking’, Modus, RICS (December 2014 / January 2015 edition).

<sup>11</sup> EGi (30 January 2015).

<sup>12</sup> ‘Alive and Clicking’, Modus, RICS (December 2014 / January 2015 edition).

<sup>13</sup> Figures for Morrisons M-Local not available.

The grocery sector is also reacting to changing shopping habits, in particular the decline of 'bulk' food shopping as customer's shop around for best value and/or undertake more frequent top-up food shopping trips. This has prompted the main operators to reconsider their growth strategies; focusing on C-store format representation and improvements to existing superstores (as opposed to opening new superstores<sup>14</sup>) as the hard discounters continue to threaten and impact on their market shares.

The UK's high streets have seen an increase in the number of pop-up shops since the economic downturn. This concept enables retailers, usually independents, to lease retail space on a short-term basis. Whilst temporary, such shops can generate interest and activity in an area and are particularly popular for seasonal items (i.e. Christmas gifts, Halloween costumes, or fireworks).

In part, changing store formats (i.e. larger and more modern floorplates) have enabled retailers to achieve improvements in the productivity and efficiency in the use of floorspace – thereby increasing retail sales densities. Other key drivers in this respect include extended opening hours, the growth of internet and multi-channel retailing, and the sale of higher value goods which do not necessarily need more space for storage and display.

The sales density of comparison goods floorspace has been rising over time (principally driven by growing population and per capita expenditure), as the provision of new floorspace has not, in some locations, kept pace with expenditure growth. Whilst there is currently a downward pressure on comparison goods sales densities, due to the uncertain economic outlook (curtailing consumer spending power) and strong market competition (including the rise of 'value' brands) and hence the limited ability of retailers to increase their prices at this time, productivity and efficiency improvements in the use of comparison goods floorspace are likely to continue for the foreseeable future.

In contrast, following a period of considerable growth between the years 2000/01 and 2007/08, convenience goods sales densities have not been rising across the board over the last few years. For some retailers (in particular the hard discounters such as Aldi and Lidl) they have risen but for others they have fallen. This includes the 'Big 4' of Asda, Morrisons, Sainsbury's and Tesco.

A further trend is the increasing proportion of supermarket floorspace dedicated to the sale of high value comparison goods (i.e. audio-visual equipment, mobile telephones). The average comparison goods sales densities achieved by the 'Big 4' foodstores is now higher than most national multiple comparison goods retailers. By way of example, Tesco achieves an average comparison goods sales density of £8,854 per sq m net<sup>15</sup> compared with the £6,919 per sq m net<sup>16</sup> achieved by Marks & Spencer.

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<sup>14</sup> Tesco, for example, recently confirmed that it was abandoning 49 superstore developments.

<sup>15</sup> Verdict Research Limited 2013.

<sup>16</sup> Mintel Retail Rankings 2014.

#### 1.1.4 Increasing importance of leisure uses

The increased importance of leisure uses in terms of anchoring town centres and major new shopping centres has become apparent in recent years. This is due in part to reduced retail expenditure, the growth of internet shopping and the polarisation of retailers to fewer, prime locations. There are also fewer retailers to fill the voids left by others, following the spate of retailer administrations since the economic downturn. The growing importance of leisure uses further reflects changing consumer habits and needs as they seek experiences as much as retail goods.

This structural change in the retail landscape has highlighted the need to provide shoppers and other users with alternative, non-retail attractions and, ultimately, a high quality experience. As mentioned above, one cannot visit a leisure attraction (such as a bar, cafe or restaurant) over the internet. In light of their ability to increase dwell time and thus consumer spending, such attractions are forming an increased proportion of floorspace in the most successful and prosperous centres.

To illustrate this point, over 20% of total floorspace at the new Trinity Leeds shopping centre, which opened in Spring 2013, is dedicated to leisure uses<sup>17</sup>; including a cinema and a range of food and drink uses. Originally, only 12% of total floorspace was due to be occupied by leisure uses; however this increased due to soaring demand from operators. Up to 30% of frontages in the new Birmingham Grand Central scheme are to be occupied by leisure uses. This marks a recent but considerable shift from retail to leisure uses within major new shopping centres. Whilst rents for leisure uses are typically lower than those achievable for retail uses, the owners of shopping centres (such as Land Securities in the case of Trinity Leeds) are recognising the value of providing leisure uses in order to create an all-round experience for shoppers.

Furthermore, according to Goad Centre Reports, the average proportion of floorspace dedicated to leisure uses (namely A3-A5) within centres across the UK has increased from 9.52% in 2008 to 11.63% in 2013; whilst the average proportion of such units has increased from 14.82% to 16.34% over the same period.

Despite the economic downturn and the effects on consumer spending, there is evidence that consumers have largely maintained the level of discretionary expenditure on eating out. Compared to say the early to mid 1990s, eating out is no longer seen as such a luxury item. The options in the marketplace for mid-market and higher-quality 'chain' dining have soared in recent years, particularly with the advent of television chefs and their branded restaurant chains. Some of the major chains that have emerged in recent years, as the branded element of the market has grown substantially, include:

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<sup>17</sup> DTZ Research (August 2013).

- Fast Casual Dining – PieMinster; Pret-A-Manger; Yo! Sushi; and Chop'd.
- Casual Dining – Prezzo; GBK; Leon; and Giraffe.
- Premium/Fine Dining – Jamie's Italian; Gaucho; Chaophraya; and Bumpkin.

In terms of non-A3 uses, the cinema sector performed relatively well throughout the economic downturn. During this period, the advent of digital and 3D movies fuelled increased cinema attendances; whilst enabling operators to charge premium prices for the product. By way of example, cinema attendances in April 2012 were 35% higher year-on-year, and Cineworld (one of the UK's leading cinema operators) reported a 5% increase in revenue over the same period. Current figures, however, indicate that such growth is slowing in some locations due to market saturation.

The health and fitness market is also an increasingly important town centre use, helping to generate footfall for other uses. The no-contract, budget operators such as The Gym Group, easyGym and Pure Gym are performing particularly well. However, the economic downturn and the squeeze on disposable incomes has had an adverse impact on the established multiple operators; most notably Fitness First, which has been forced to close a number of health and fitness clubs as a result of falling revenues.

#### 1.1.5 Mix of uses including the balance between multiple and independent retailers

With many multiple retailers seeking to right-size and reduce their physical store footprint, this presents opportunities for alternative land uses. As mentioned, leisure uses are playing an increasingly important role in successful town centres in the wake of ongoing structural changes in the retail sector and changing consumer habits and needs. Other non-retail uses such as residential, office and community uses also have an important role to play in sustaining town centre vitality and viability. To that end, increasing a town centre's resident and worker population can help to create vibrancy and support other main town centre uses including retail and leisure.

The permitted development rights introduced (and proposed) by the Government are likely to have implications for Town Centres and their mix of uses. Currently, the rights allow for office to residential conversion without the need for planning permission (only prior approval). Across the UK this has had implications for town centres and particularly the office sector in terms of supply; however, we would note that the office to residential permitted development right currently applies only until 30 May 2016<sup>18</sup>. The permitted development and prior approval regimes are considered in further detail at section 7 of this Study.

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<sup>18</sup> As it stands, there is uncertainty over whether this permitted development right will be extended beyond this point by the next Government (post-Election in May 2015). If it is not, the right will not apply if the conversion is not completed or ready for occupation by 30 May 2016.

As well as a mix of land uses, it is important to ensure that any town centre has an appropriate balance, or mix, between multiple ‘chain’ retailers (those trading from multiple stores with either a strong local or national presence) and independent retailers (those who tend to trade from a single store). Multiple retailers offer substantial benefits to town centres, including:

- The ability to offer to shoppers the products and goods that they require at the most competitive prices;
- The ability to drive substantial levels of footfall, especially with department store operators (e.g. Debenhams) and popular fashion/technology operators (e.g. Apple) which can help to support independent retailers and other town centre uses;
- They help to increase investment levels by providing landlords with greater security in terms of income relative to that offered by independent retailers.

The main issue with having too many multiple retailers is that of identity. Today, many of the UK’s town centres look the same, with the same rows of shops (e.g. Boots, WH Smith, The Body Shop, Next) and no discernible difference and no character. It is important for town centres to differentiate themselves and provide a unique experience for shoppers, in order to increase its vitality and prosperity. A balanced mix of multiple and independent retailers should help to assist with this.

#### 1.1.6 Providing a high quality experience and environment

An important consumer behavioural change to have had implications for retailers and town centres includes the desire for ‘experience retail’ – defined by the Department of Business Innovation and Skills as *‘shopping experiences which are enjoyable in their own right, rather than just being about successfully purchasing a desired good’*. This recent change has been accelerated with the rapid emergence of and developments in e-commerce, which has meant that consumers are less likely to visit physical stores unless they provide an enjoyable experience<sup>19</sup>.

Town centres that can offer experience retail and an excellent all-round experience to shoppers and other town centre users are likely to be better positioned than others in terms of countering the challenges of the changing retail landscape. The quality of the leisure offer can be as important as the retail offer in this respect. As per the case example of Trinity Leeds considered above, the owners of shopping centres are recognising the value of providing high quality leisure uses in order to attract and create an all-round experience for shoppers.

The quality of the physical environment is another important factor to consider. Good urbanism, design and definitions of place are an essential pre-requisite in order to attract inward investment; create opportunities for interaction and exchange; and generate growth in commercial, community and/or aesthetic value over time.

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<sup>19</sup> Hart and Laing, 2014.

Whilst it is very difficult to isolate the impact of improving the local environment and providing infrastructure elements on property values, there are some examples. *The Cut* in Southwark, London, benefitted from a £3m public realm renovation in 2007/2008 which included:

- widening and resurfacing of footways;
- improved lighting;
- planting trees;
- new pedestrian signage.

Research on these improvements concluded that, as a result of the four infrastructure elements above, around £9.5m had been added to the value of private property in the area. Put simply, this is a circa 200% return on investment – thereby demonstrating the potential impact.

A larger scale example is *The Arc* in Bury St Edmunds. This circa £100m retail-led mixed use scheme included the regeneration of the town's civic core. As well as public realm improvements the scheme comprised a public arts venue, which has been important in improving the town centre experience. The result was an increase in town centre footfall, dwell time and income, with a significant uplift in revenues though car parking.

Funding for these initiatives is challenging in the current economic climate. Within a closed environment of single ownership such as a shopping centre, public realm improvements can be funded through service charges. However in town centres, where ownerships can extend to hundreds of parties, the solution is far more problematic but could include pooling S106 contributions by town centre developers to fund off-site public realm works; and/or designating a Business Improvement District (BID) whereby businesses pay additional taxes to fund local projects and improvements.

## 1.2 PLANNING POLICY IMPLICATIONS FOR THE BOROUGH

### 1.2.1 The Borough's town and district centres

The importance of the retail sector to town centres should not be understated; being the key driver of activity and vital in creating the environment for other main town centre uses (and residential uses) to be successful. The same is true of the Borough's district centres. The trends identified above have a number of implications for town planning and development in the Borough's town and district centres. These are summarised below:

- The retail sector, in spite of the ongoing structural changes and challenges, is and will continue to be the key driver of activity in the Borough's town and district centres and thus essential for their health and prosperity.
- The continued growth of internet shopping is likely to impact on town/district centre footfall and vibrancy, and squeeze retailers' profitability; not only national multiple retailers but also smaller, independent retailers. As discussed above, this is a nationwide issue (not borough-specific) but is very relevant to the future vitality and viability of the Borough's centres. E-commerce presents opportunities too, however, and the integration of 'click and collect' hubs and/or the use of digital technology should be encouraged in the Borough's town centres in particular.
- Windsor and Maidenhead Town Centres, particularly, will be constrained by the polarisation and downsizing of national multiple retailers, especially in terms of their ability to attract new such retailers. The major retailers will continue to focus representation in a small number of the UK's prime locations. While RBWM should seek to retain (and attract) as many shops as possible, retailer 'right-sizing' is likely to present opportunities for alternative, non-retail land uses including leisure, office, residential and community uses – which can help to increase the resident and worker population of the town centres in order to support other uses.
- Alternative land uses should be complementary to the retail offer, being the key driver of activity.
- Key to attracting new modern retailers to Windsor and Maidenhead Town Centres will be the provision of large, flexible units – of the type that attracted the likes of Zara and H&M to Windsor's Royal Edward Court – in prominent and well connected town centre locations. Accordingly, RBWM should consider favourably applications to amalgamate retail units<sup>20</sup> within Primary Shopping Areas; and should work with its partners to positively plan for town centre development opportunities. Later in this Study we assess the quantitative need for new retail development in the Borough (section 5), and consider potential sites for accommodating such new development (section 6).
- Further key to attracting new modern retailers include (as discussed below) creating the right conditions for modern retailers, such as high quality public realm and a complementary mix of town centre uses.
- As highlighted in section 3 below, Ascot and Sunningdale District Centres comprise very few national multiple retailers. However, those that exist (namely Tesco Express and Boots in the case of Ascot) predominantly cater for the day-to-day convenience needs of local residents and are therefore likely to continue to perform vital anchoring roles in the district centres.
- It will be increasingly important for the existing mix of independent retailers in the Borough's town/district centres to provide a high quality, distinguished offer. In the context of the shift towards internet shopping, such retailers should also be encouraged to establish their own transactional websites and/or marketing campaigns so as to expand their potential market and thus profitability.
- In order to prevent the loss of existing retailers and sustain as many shops as possible, the Borough's town/district centres will need to ensure their attractiveness as places to shop – whilst being more than simply places to shop given changing consumer expectations for a high quality, combined retail and leisure experience. Windsor Town Centre in particular, with its special attractions, is well placed to strengthen the consumer experience and increase dwell time.

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<sup>20</sup> Subject to the provisions of the development plan and other material considerations.

- In parallel to this, RBWM should look to fund and ‘roll out’ an extended programme of public realm improvements in Windsor and Maidenhead Town Centres in particular. Potential such improvements are identified in section 3 below.
- The emergence of new store formats in out-of-centre locations, especially those being pursued by major retailers selling all-product ranges – including ‘non-bulky goods’ which, traditionally, have been sold from town centres – represent a threat to the future vitality and viability of Windsor and Maidenhead Town Centres in particular. This underlines the need for the Council to positively plan for town centre development opportunities and control out-of-centre retail development including extensions and changes of use. Failure to do so will threaten the future vitality and viability of the Borough’s town/district centres.
- The provision of convenient and affordable town centre car parking is key in order to better compete with out-of-centre shopping destinations, which are accessible by car and served by free surface level car parking.
- New representation in the grocery sector is likely to be focused on C-store formats and the hard discounters, in response to changing shopping habits.

### 1.2.2 The Borough’s local centres

The hierarchy of shopping centres in the Borough<sup>21</sup> includes five local centres; namely Sunninghill, Datchet, Cookham Rise, Eton and St Leonards Road. These centres are smaller in scale (relative to the Borough’s town and district centres), comprise a limited number of retail and service uses, and principally serve essential, convenience-based shopping and service needs in the immediate surrounding areas.

In the light of the identified current and emerging trends in retailing, we summarise below the potential implications for the Borough’s local centres and their future role and function:

- The relative dominance and attractiveness of larger centres (over smaller, local centres) will continue as retailers polarise, and as the larger centres improve and increasingly compete for such retailers.
- With modern retailers seeking large and more flexible units, this trend favours the larger centres – typically those better placed to meet such requirements and/or accommodate new provision.
- Changing consumer expectations for a combined retail and leisure experience will apply to the Borough’s local centres to an extent, and they should be promoted as more than simply places to shop.
- Linked to the preceding point, there is a role for family-orientated food and drink uses in local centres as well as the essential, more traditional local services and community-based facilities. This will help to create choice and increase dwell time.
- It will be important to maximise the number of occupied shop units through flexible policies for changes of use. This will help to ensure the vitality and viability of the Borough’s local centres and, in turn, protect and support the existing mix of independent retailers and service businesses.

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<sup>21</sup> Borough Local Plan 2003.

- To make the local centres as attractive and convenient to users as possible in the face of increasing competition and choice (and mindful of their role as localised convenience-based shopping centres), car parking facilities should be accessible, flexible (in terms of duration of 'free' stay) and close to shops and services.
- Ensuring the general environmental quality of local centres will be important to create the perception and conditions necessary for attracting new investment.

### 3. Healthcheck Assessments

This section examines the vitality and viability of Windsor and Maidenhead Town Centres, and Ascot and Sunningdale District Centres; having regard for the healthcheck indicators set out in the national Planning Practice Guidance<sup>22</sup> including:

- Diversity of uses;
- Vacancy rates;
- Retailer representation;
- Commercial rents and yields;
- Pedestrian footfall;
- Centre users' views and behaviours;
- Accessibility;
- Environmental quality;
- Perception of safety.

Our healthcheck assessments in respect of Windsor and Maidenhead Town Centres are further informed by the results of the Town Centre Improvement Workshops. The purpose of these two Workshops was for local businesses, stakeholders and community organisations to develop ideas and identify priorities for improving the Borough's town centres. Full details, and the results, are provided in Annex A (Windsor) and Annex B (Maidenhead).

We conclude our healthcheck assessments with a SWOT analysis of each centre to highlight their current and likely future role. In the first instance, however, we indicate (by way of context) the status of the Borough's hierarchy of shopping centres based on their respective national retail ranking.

A key indicator of the vitality and viability of a centre is its retail ranking over time. Figure 3.1 below indicates the current status of Windsor and Maidenhead Town Centres, and Ascot and Sunningdale District Centres, relative to their respective status in 2010.

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<sup>22</sup> Planning Practice Guidance: Ensuring the vitality of town centres (March 2014).

**Figure 3.1 – Centre Retail Ranking**

<b>Town Centres</b>	<b>2014 Rank</b>	<b>2010 Rank</b>	<b>Change (2010-2014)</b>
Windsor	107	215	+108
Maidenhead	344	233	-111
<b>District Centres</b>			
Ascot	2,552	2,309	-243
Sunningdale	3,271	2,514	-757

Source: CACI Retail Footprint 2014.

Windsor Town Centre’s notable rise in the rankings (from 215<sup>th</sup> in 2010 to 107<sup>th</sup> in 2014) is very encouraging and – in the absence of any new major retail-led town centre development during this period – possibly indicates that Windsor has successfully retained and/or added to its critical mass of main retail attractions at a time when similarly-ranked centres across the UK have not (in the wake of increased retailer polarisation and downsizing).

Maidenhead Town Centre is currently ranked 344<sup>th</sup> (down from 233<sup>rd</sup> in 2010). On the face of it, this decline in the rankings is significant and is likely to be reflective of the lack of inward investment (i.e. new major retail development and/or retailer representation) over this period. Another contributing factor may be the relative improvement of similarly-ranked centres across the UK.

Ascot and Sunningdale District Centres have both dropped down the rankings considerably since 2010; however, we would caution that this does not necessarily reflect the current health of these district centres. Rather, their relative decline in the rankings is, in our view, likely to be attributed to the improvement of similarly-ranked centres (as opposed to a step-decline in their retail offer).

## 1.3 WINDSOR TOWN CENTRE

### 1.3.1 Diversity of uses

Figure 3.2 below sets out the composition of uses in Windsor Town Centre. This analysis focuses on a number of Experian Goad categories, namely:

- Comparison Retail (e.g. clothing and footwear, furniture, jewellery, electrical goods, toys);
- Convenience Retail (e.g. butchers, bakers, supermarkets);
- Retail Services (e.g. dry cleaners, hairdressers and beauticians, travel agents);
- Leisure Services (e.g. cafes, bars, restaurants);
- Financial & Business Services (e.g. banks, estate agents); and
- Vacant.

**Figure 3.2 – Diversity of uses, Windsor Town Centre (2014)**

Use Category	Units (count)	Units (%)	Floorspace (sq m)	Floorspace (%)
Comparison Retail	149	37.4%	31,643	43.4%
Convenience Retail	26	6.5%	4,831	6.6%
Retail Services	48	12.1%	3,865	5.4%
Leisure Services	116	29.2%	24,080	33%
Financial & Business Services	32	8%	4,552	6.2%
Vacant	27	6.8%	3,967	5.4%
TOTAL	398	100%	72,938	100%

Source: Experian Goad Category Report (May 2014).

There are 398 units in Windsor Town Centre, equating to 72,938 sq m of floorspace<sup>23</sup>. The main findings from our analysis include:

- Windsor Town Centre has a strong representation of Comparison Retail floorspace, accounting for almost half of the total floorspace (43.4%, or 37.4% of total units). The dominance of Comparison Retail is to be expected in a centre the size and nature of Windsor (because the larger the centre the higher the proportion of floorspace attributed to Comparison Retail).
- Unsurprisingly, given the town centre’s role as a popular tourist destination, the next highest proportion of units and floorspace (29.2% and 33% respectively) are dedicated to Leisure Services; namely restaurants (38 units), cafes (29) and bars (11).
- As expected for a centre the size and nature of Windsor, its Convenience Retail offer is relatively modest compared with its Comparison Retail and Leisure Services offer; with 6.5% of total units and 6.6% of total floorspace.
- Retail Services account for 12.1% of the total number of units in Windsor town centre; but only 5.4% of total floorspace (indicating that Retail Services, as expected and similarly to Financial & Business services, occupy smaller-sized units in the town centre).

All successful centres require a balance of uses in order to encourage linked trips and to maintain their vitality and viability. Comparison Retail is (as expected) the largest use category in Windsor Town Centre; followed by Leisure Services including food and drink uses, which are performing an increasingly important role in successful centres.

Figure 3.3 below shows the composition of Use Classes (by units) in Windsor Town Centre over time. Between 2010 and 2012, there was little change in the number of units occupied by A1 Retail and Non-A1 Retail (i.e. A2-A5). More recently, in 2014, the number of A1 Retail units has decreased while the number

<sup>23</sup> Floorspace (sq m) is Experian Goad gross floorspace.

of Non-A1 Retail units has increased. This composition shift in Windsor Town Centre may reflect national trends in retailing and the increasing importance of A3 leisure uses in response to changing consumer habits and needs.<sup>24</sup>

**Figure 3.3 – Use Classes composition by units, Windsor Town Centre (2010-2014)**

Use Class	2010 (February)	2012 (February)	2014 (May)
A1 Retail	244	243	223
Non-A1 Retail	109	106	148

Source: RBWM Use Classes Breakdown (2010 & 2012) and Experian Goad (2014).

### 1.3.2 Vacancy rates

As shown in Figure 3.2 above, which is based on the latest Experian Goad Category Report for Windsor, in May 2014 there were 27 vacant shop units in the town centre; or 6.8% as a proportion of the total number of units. The overall quantum of vacant floorspace in Windsor Town Centre is 3,967 sq m (5.4% of total floorspace).

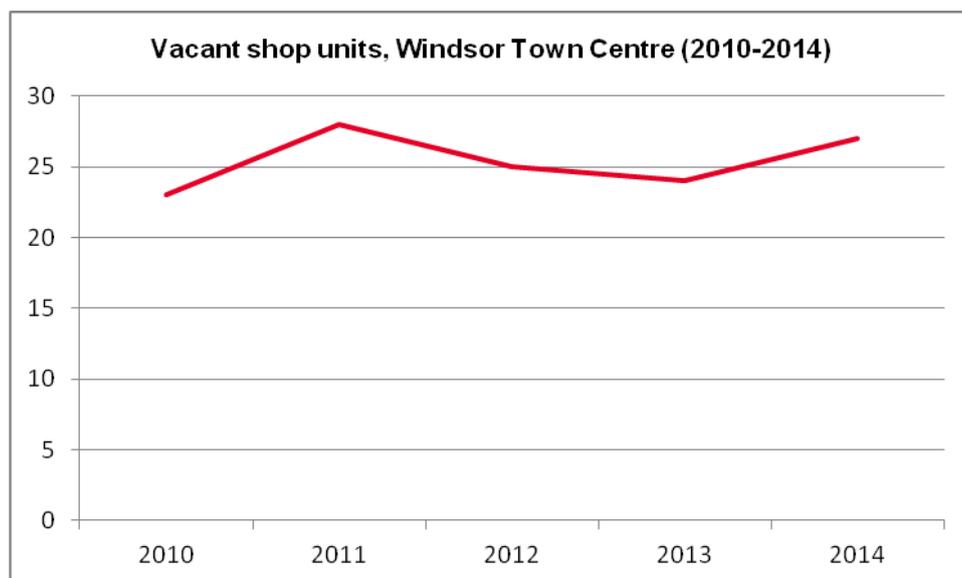
Figure 3.4 below shows vacancy rates in Windsor Town Centre over a five-year period. The total number of vacant shop units has increased by about 17% since 2010 (from 23 to 27) but, on the whole, has remained relatively stable in the context of the UK recession and the spate of retailer administrations and closures.

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<sup>24</sup> However we would caution that the two datasets (RBWM Use Classes Breakdown and Experian Goad) used for the purpose of this analysis may not be entirely compatible in terms of the extent of the town centre survey area.

**Figure 3.4 – Vacant shop units, Windsor Town Centre (2010-2014)**

Year	2010 (February)	2011 (February)	2012 (February)	2013 (March)	2014 (May)
Vacant shop units	23	28	25	24	27



Source: RBWM Use Classes Survey 2010-2013. Experian Goad Category Report 2014.

The survey by Experian Goad (May 2014) identified 27 vacant shop units dispersed throughout Windsor Town Centre. There were 5 vacant shop units on Peascod Street, despite being one of the main shopping streets and pedestrian thoroughfares in the town centre. This perhaps indicates that these smaller-sized units are unsuitable for modern retailer requirements, or that the street’s steep gradient at its upper (northeast) end is a constraint on retailer occupation; or a combination of both factors. There were also predominantly smaller-sized vacant shop units on Thames Street (4), High Street (3), and within Windsor Royal Station and King Edward Court (2 each).

### 1.3.3 Retailer representation

Windsor Town Centre includes 18 of the 31 major retailers defined by Experian Goad, as shown in Figure 3.5 below:

**Figure 3.5 – Major retailers, Windsor Town Centre**

Department Stores	Mixed Goods Retailers	Supermarkets	Clothing	Other Retailers
Marks & Spencer	Boots TK Maxx WH Smith	Waitrose	Dorothy Perkins H&M New Look Next River Island Topshop	Carphone Warehouse Clarks Clintons O2 Superdrug Vodafone Waterstones

Source: Experian Goad, DTZ Update (February 2015).

Of the 31 major retailers, the department stores of BHS, Debenhams, House of Fraser and John Lewis are not represented in Windsor Town Centre. However, the town centre is served by two department stores; namely Fenwick and Daniel of Windsor (albeit the former in particular is not a full range department store<sup>25</sup>). Other major retailers not currently represented include ‘lower end’ retailers such as Argos, Burton, Primark, H&M and Wilkinson. Interestingly, whilst Topshop forms part of the retailer line-up at King Edward Court, Topman is not represented in the town centre.

The major retailers identified in Figure 3.5 above – plus a range of mid-market multiple retailers such as Zara, Monsoon, Super Dry and Gap – are predominantly concentrated within King Edward Court and at the upper (northeast) end of Peascod Street. There are also some major and multiple retailers along Thames Street and, to a lesser extent, High Street; taking advantage of the high levels of pedestrian footfall close to Windsor Castle. Peascod Street, particularly at its lower (southwest) end, also includes some lower end retailers.

Windsor Royal Station offers a number of smaller-sized shops and stalls, with upmarket fashion retailers such as Hobbs, Jaeger, Jigsaw and Joules; as well as a strong independent offer selling health and beauty products, gifts and jewellery. The scheme is also supported by a number of food and drink uses, including national ‘chains’ such as Gourmet Burger Kitchen, Cafe Rouge, La Tasca and All Bar One.

The town centre has a mix of long established businesses. These are predominately situated beyond Windsor’s core shopping area although there are exceptions including the Daniel of Windsor department store.

<sup>25</sup> Notable exclusions include menswear and electrical goods.

### 1.3.4 Commercial rents and yields

The level of rent which retailers are prepared to pay for retail space in a centre is an indication of the perceived strength of that centre. Promis<sup>26</sup> report that, at the end of 2014, the average prime Zone A rent in Windsor Town Centre was £140 per sq ft. This represents no change on the mid 2014 average prime rent, and compares with £60 per sq ft in Maidenhead Town Centre.

In terms of commercial yields, which are an indicator of investor confidence in a centre (with lower yields indicating higher investor confidence in future rental growth), Promis report that yields in Windsor Town Centre were circa 5% at mid 2014.

### 1.3.5 Pedestrian footfall

We outline below the indexed<sup>27</sup> levels of pedestrian footfall at 30 count points in Windsor Town Centre, on both weekdays and Saturdays, at select years since 2008. This provides a useful barometer of the relative 'busyness' and performance of various town centre locations over time.

The pedestrian footfall surveys were undertaken at 30 count points over a six-hour period (10.00-17.00). A plan of the count points in Windsor is provided at Appendix A.

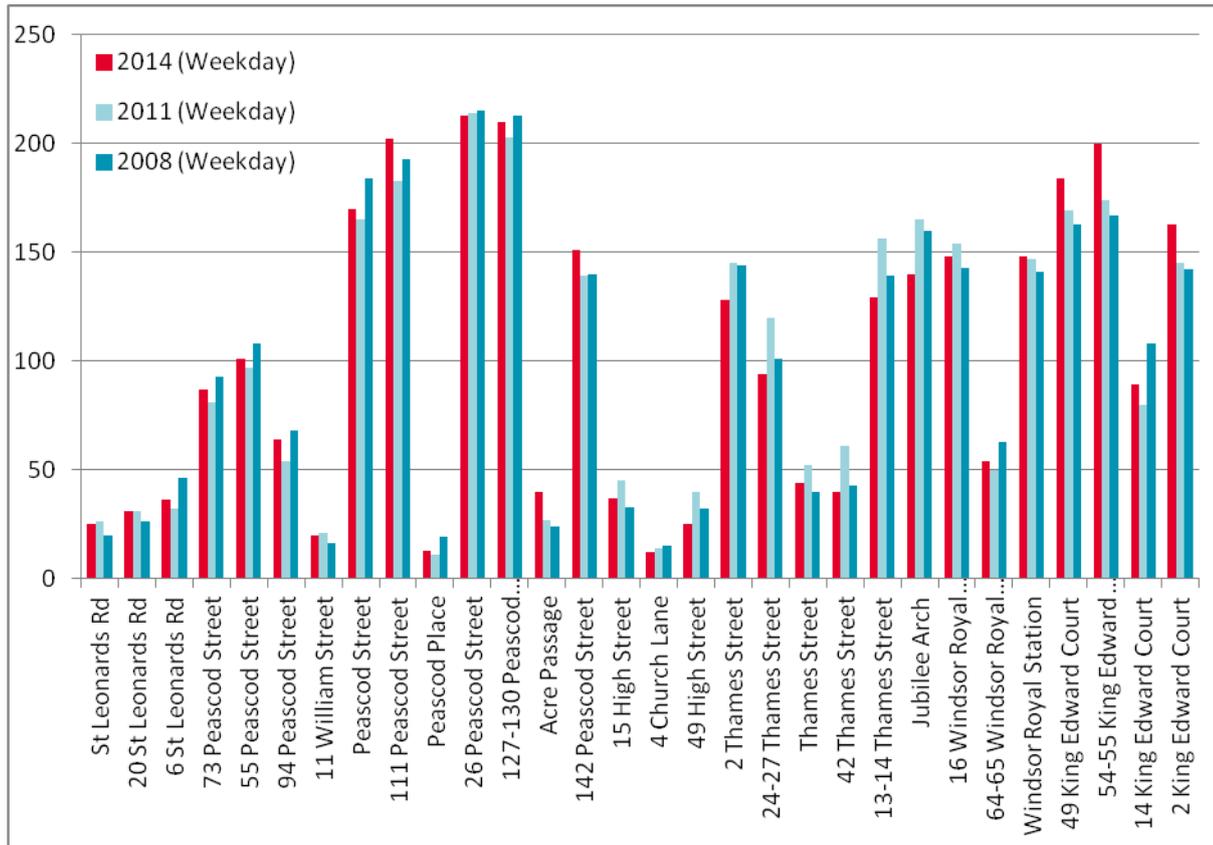
Figure 3.6 below shows (indexed) levels of pedestrian footfall in Windsor Town Centre on weekdays in October 2008, September/October 2011 and November 2014 respectively. Figure 3.7 relates to (indexed) levels of pedestrian footfall recorded on Saturdays – typically the main shopping day of the week.

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<sup>26</sup> Promis Retail Report – Windsor (March 2015).

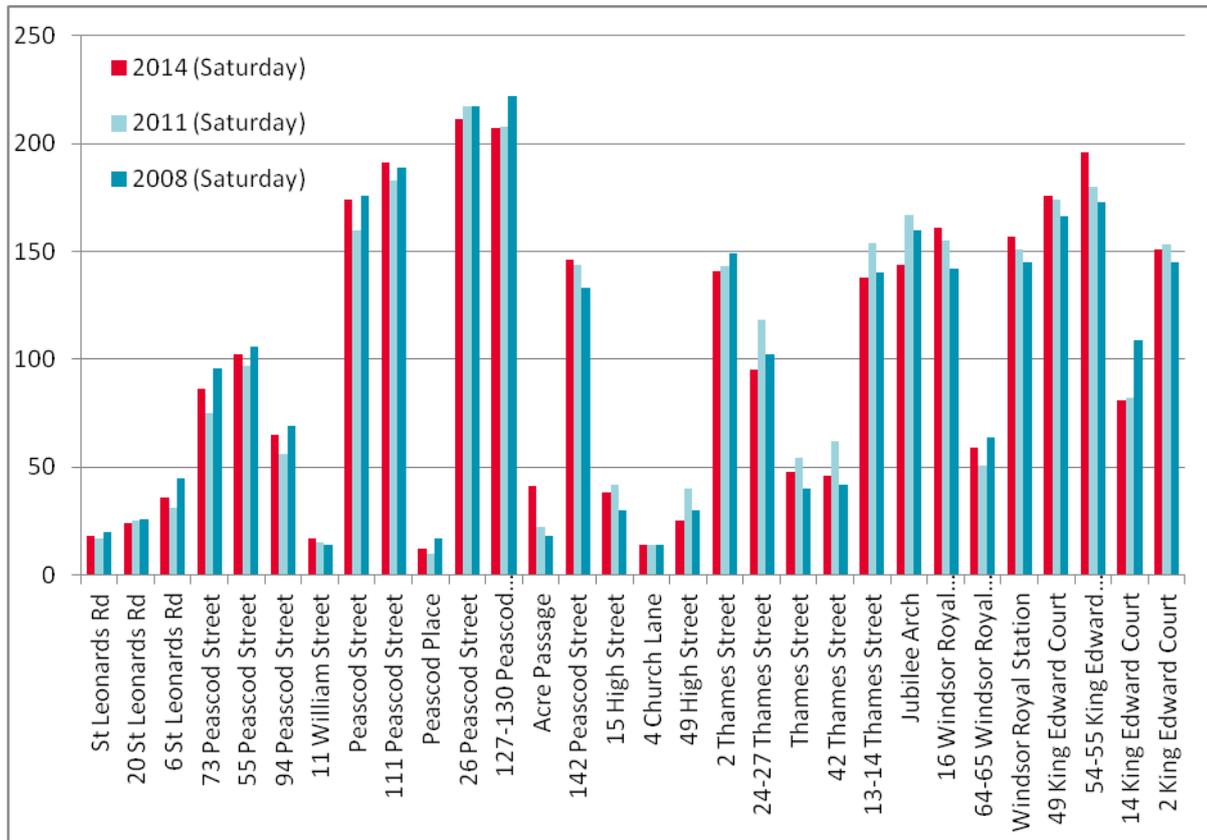
<sup>27</sup> Indices – as shown on the x-axis of Figures 3.6 and 3.7 – are percentages based on the average recorded 'flow' of all 30 count points (benchmarked at 100%) so as to indicate the locational hierarchy of pedestrian footfall throughout the town centre.

Figure 3.6 – Weekday pedestrian footfall (indexed), Windsor Town Centre (2008, 2011 and 2014)



Source: PMRS – Windsor Pedestrian Footfall Standard Reports.

Figure 3.7 – Saturday pedestrian footfall (indexed), Windsor Town Centre (2008, 2011 and 2014)



Source: PMRS – Windsor Pedestrian Footfall Standard Reports.

Figures 3.6 and 3.7 show that count points at the upper end of Peascod Street (close to Marks & Spencer and the Daniel of Windsor department store) have been the highest footfall locations in Windsor Town Centre in recent years, on both weekdays and Saturdays. Other count points with relatively high pedestrian footfall include King Edward Court, Windsor Royal Station and Jubilee Arch, which is the main pedestrian thoroughfare connecting Windsor Royal Station with Thames Street and the site of Windsor Castle.

Levels of pedestrian footfall in Windsor Town Centre dropped off at count points not in relative proximity to the main retail, cultural and/or other visitor attractions.

### 1.3.6 Centre users’ views and behaviours

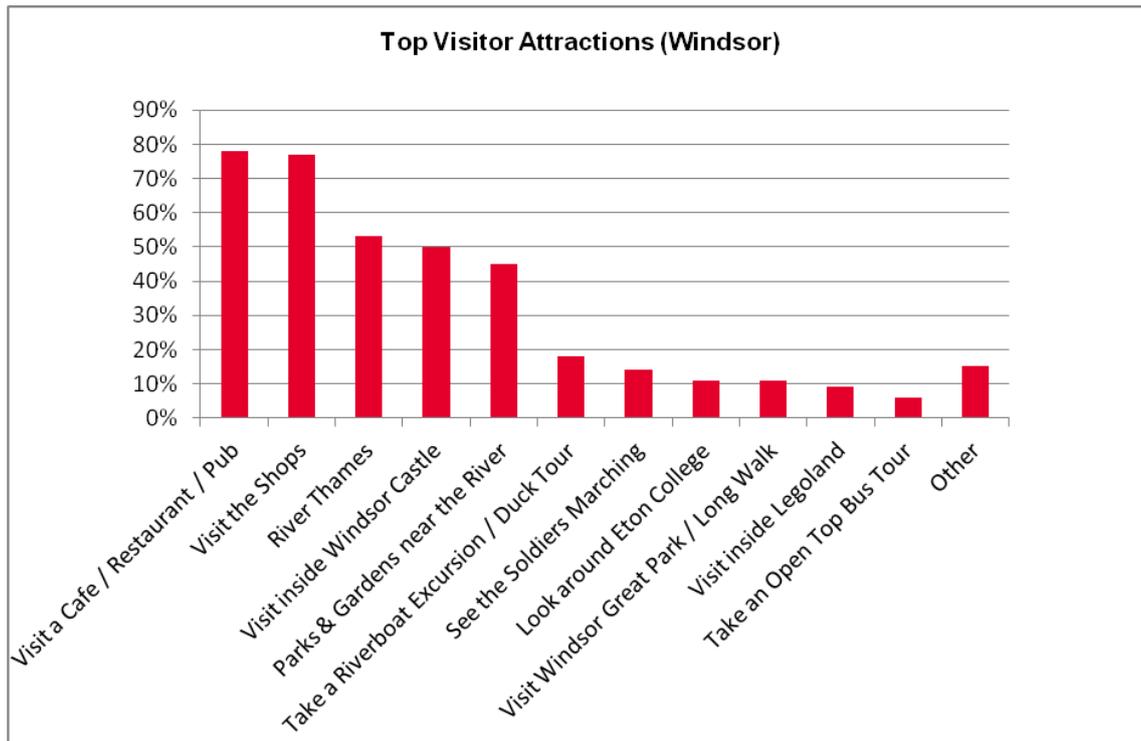
Information on Windsor Town Centre users’ views and behaviours has been obtained from two sources, namely:

- Windsor Visitor Survey 2014; and
- RBWM Household Interview Survey 2015.

In the first instance, we consider select findings from the on-street Windsor Visitor Survey 2014. This is based on a random survey sample of 400 visitors at several town centre locations, including: Windsor and Eton Bridge (18% of total on-street surveys); corner of High Street and Castle Hill (32%); Peascod Street (12%); Windsor Royal Station (33%); and the Guildhall area (6%).

Figure 3.8 below shows the town’s top visitor attractions. The retail and leisure offer performs well in this respect, with visiting a cafe/restaurant/pub and visiting the shops being the most popular responses. Visiting the River Thames, Windsor Castle and parks and gardens close to the River Thames are also popular attractions.

**Figure 3.8 – Top Visitor Attractions, Windsor (2014)**



Source: TSE Research – Windsor Visitor Survey 2014.

Figure 3.9 below shows visitor’s satisfaction with shopping facilities (i.e. the retail offer) in Windsor. The significant majority of visitors (95%) consider the town’s range of shopping facilities to be good or very good. Windsor performs much better than Maidenhead in this respect. Windsor also performs very well in terms of the shopping environment and the quality of service.

**Figure 3.9 – Visitor Satisfaction with Shopping Facilities, Windsor (2014)**



Source: TSE Research – Windsor Visitor Survey 2014.

Figure 3.10 below shows visitors' satisfaction with the food and drink offer in Windsor. Over 95% of visitors consider the town's range of places to eat and drink to be good or very good.

**Figure 3.10 – Visitor Satisfaction with Places to Eat & Drink, Windsor (2014)**



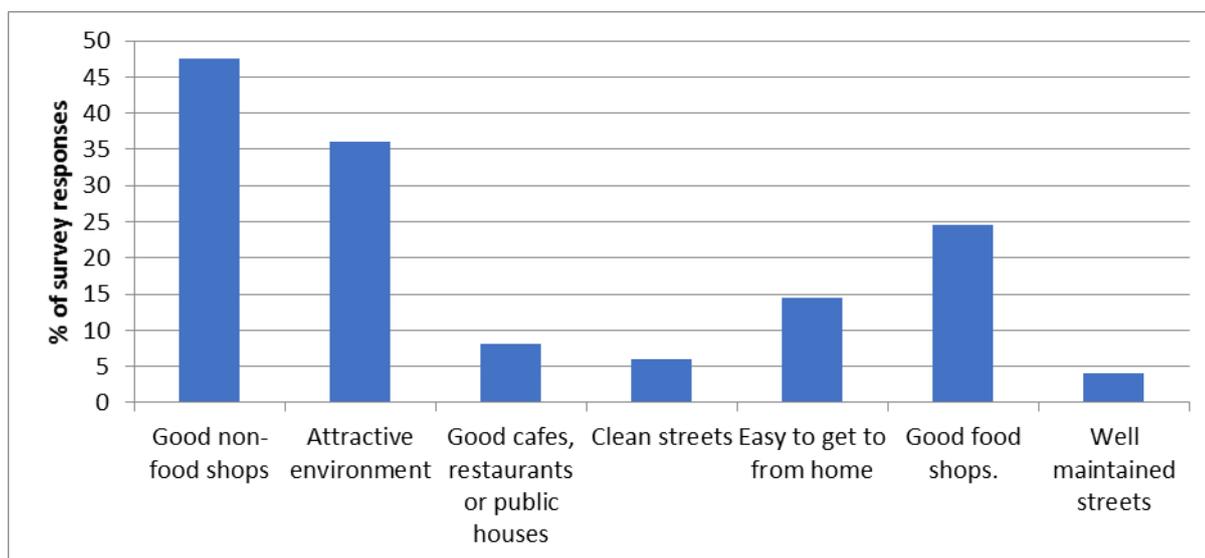
Source: TSE Research – Windsor Visitor Survey 2014.

Supplementary to the above, we have obtained from the RBWM Household Interview Survey 2015 the likes and dislikes of respondents who use Windsor Town Centre the most for shopping and services.

Figure 3.11 below shows what users of the town centre like the most about Windsor for shopping and services. The results indicate that good non-food shops is users’ principal reason for liking the town centre (47.6%), with the town’s attractive environment being the second most popular response (36.1%); followed by good food shops (24.5%).

The survey results are generally positive with respect to the town centre environment, with a number of users citing clean streets (6%) and well maintained streets (4%) as their main like about Windsor Town Centre.

**Figure 3.11 – Main ‘likes’ about Windsor Town Centre for shopping and services (2015)**



Source: RBWM household interview survey (2015).

Figure 3.12 below shows what users of the town centre dislike the most about Windsor for shopping and services. Almost half (44.7%) of survey respondents stated that they dislike nothing or very little about Windsor Town Centre, indicating that town centre users are generally satisfied with the town centre for shopping and services.

Car parking is a notable dislike about Windsor Town Centre, however, with around a quarter of users (25.8%) stating that parking is too expensive; while many also experience difficulties in terms of parking near shops (17.7%).

**Figure 3.12 – Main ‘dislikes’ about Windsor Town Centre for shopping and services (2015)**



Source: RBWM household interview survey (2015).

Overall, it is clear from the 2014 and 2015 survey information that users of Windsor Town Centre are generally satisfied; however, car parking is identified as a particular area for improvement.

### 1.3.7 Accessibility

The results of the 2015 household interview survey indicate that over three-quarters (77.7%) of respondents who use Windsor Town Centre the most for shopping and services usually travel by car. Other respondents’ modes of travel include 9.7% by public transport (6.8% bus, 2.9% train) and 9.6% on foot.

The main vehicular routes into Windsor Town Centre include the A355 (leading to/from M4 Junction 6) and the A308 (leading to/from M25 Junction 13 to the east and Maidenhead to the west). We consider the town centre to be well served by car parking and Park & Ride schemes. The main town centre car park is the King Edward Court multi-storey with circa 1,000 spaces, which is pay-on-exit and offers a Shop Mobility service. Further provision in Windsor Town Centre includes the Victoria Street multi-storey car park (circa 200 spaces) and a number of surface level car parks such as Alexandra Gardens and River Street. There are also several car parks located outside but close to the town centre such as King Edward VII and Home Park, both of which include Park & Ride schemes serving the town centre. Other current Park & Ride services operate to/from Legoland and Centrica.

Based on the results of the 2015 household interview survey, which asked respondents what they like and dislike about Windsor Town Centre, over a quarter (25.8%) consider car parking to be too expensive. Some 17.7% of respondents stated that it is difficult to park near the shops, whereas 3.2% cited ease of parking as their main ‘like’ about the town centre.

Windsor Town Centre is served by two railway stations, namely Windsor & Eton Central (First Great Western services to/from Slough) and Windsor & Eton Riverside (South West Trains services to/from London Waterloo). Close to Windsor & Eton Central railway station, adjacent to Alexandra Gardens, is the Windsor coach park, which caters for tourists arriving in the town by coach. A number of bus stops serve the town centre although, given that much of Windsor's core shopping area is pedestrianised, these are generally located in the more peripheral areas of Victoria Street, High Street and Thames Street. Private bus operators run services to/from a number of surrounding destinations (such as Maidenhead, Ascot, Sunningdale, Slough, Bracknell, Staines, Heathrow Airport etc).

The pedestrianised areas of Windsor Town Centre include King Edward Court, Windsor Royal Station and Peascod Street (as far south as Victoria Street). These areas comprise the key retail attractions and are accessible to Windsor Castle – one of the town's top visitor attractions – albeit the steep gradient of the upper end of Peascod Street is likely to be a challenge for some pedestrians including the disabled and the elderly. We consider Windsor's key destinations and visitor attractions to be reasonably well signposted; however, town centre wayfindings should be improved to/from the river in particular. On a related point, we consider that more should be done to attract cyclists into the town centre. Improved linkages to/from the river (together with the provision of better cycle facilities) presents an opportunity in this respect.

### 1.3.8 Environmental quality

As considered in section 2 above, the quality of a town's physical environment is an important pre-requisite of attracting investment and providing shoppers and other town centre users with a positive all-round experience.

Windsor Town Centre has, on the whole, a high quality and pleasant environment owing to its historic nature and setting (i.e. alongside Windsor Castle). Much of the town centre is a designated conservation area, while its proximity to the River Thames and outdoor public spaces such as Alexandra Gardens and Bachelor's Acre helps to enhance its environmental quality. There are, however, areas which detract from the town's environmental quality. The headline findings from our town centre inspections include:

- Windsor Royal Station is a fine example of a historic railway station modernised and reconfigured to accommodate retail and leisure (namely A3/A4) attractions, whilst maintaining original railway station buildings and features. It is well connected to King Edward Court and Windsor Castle.
- King Edward Court is a well-integrated 'old with the new' shopping scheme, generally comprising a high quality public realm and large, modern shop units. However, the paved 'square' to the immediate east (front) of the Fenwick store should be better utilised. The shopping scheme is easily accessible to/from Windsor Royal Station and Peascod Street and has its own dedicated multi-storey car park.
- At the time of our town centre inspections, the lower end of Peascod Street (i.e. south of William Street) was the focus of repaving works. These ongoing works, which are scheduled for completion by May 2015, should be extended to include the upper end of Peascod Street. This pedestrianised section of Peascod Street is looking 'tired' – relative to King Edward Court in particular – and would benefit from public realm improvements including new lighting, seating and planters.
- Key 'arrival' routes into the core shopping area from the south including William Street and, to a lesser extent, Peascod Street should be improved to enhance the perception of the town centre as a key shopping and visitor destination.
- The walkway to/from Windsor coach park could also be improved so as to enhance this important visitor/ tourist 'gateway' into the town centre.

- High Street and Thames Street are dominated by the setting of Windsor Castle, which is a major tourist attraction (a theme reflected by the number of tourist-type shops in this location). Both streets are generally well kept and include relatively clutter-free pavements, several kerb-height pedestrian crossings, and planters.

Further observations on the quality of the town centre environment can be drawn from the results of the 2015 household interview survey. Over a third (36.1%) of respondents who use Windsor Town Centre the most for shopping and services stated that the attractive environment is their main ‘like’ about the town centre. Other environmental ‘likes’ included clean streets (6% of responses) and well maintained streets (4%).

### 1.3.9 Perception of safety

Based on crime statistics sourced from the Thames Valley Police website, Figure 3.13 below shows the number of crimes reported in ‘Windsor Central’ including Windsor Town Centre between December 2010 and December 2014.

**Figure 3.13 – Number of crimes, Windsor Town Centre**

Year	2010 (December)	2011 (December)	2012 (December)	2013 (December)	2014 (December)
Number of crimes	249	234	192	182	131

Source: [www.thamesvalley.police.uk](http://www.thamesvalley.police.uk) (accessed February 2015).

The number of crimes reported in Windsor Central has decreased considerably and consistently year-on-year since 2010; with crime statistics for 2014 almost half those recorded in 2010. Most recently, the main type of crime within the area was violence and sexual offences (28 instances reported), followed by anti-social behaviour (22), theft (16) and shoplifting (14).

Based on the results of the 2015 household interview survey, 4.9% of respondents who use Windsor Town Centre the most for shopping and services considered good safety/security to be their main ‘like’ about the town centre. It is positive that no respondents indicated that the town centre does not feel safe.

### 1.3.10 SWOT analysis and conclusions

Figure 3.14 below identifies Windsor Town Centre’s Strengths, Weaknesses, Opportunities and Threats.

**Figure 3.14 – SWOT analysis, Windsor Town Centre**

Strengths	Weaknesses
<p>Rise in the UK retail rankings.</p> <p>Pedestrianised main shopping streets.</p> <p>Established ‘critical mass’ of major and multiple retailers, including upmarket fashion retailers at Windsor Royal Station.</p> <p>Modern, pedestrian-friendly outdoor shopping environment at King Edward Court.</p> <p>Strong and well integrated retail circuit (Windsor Royal Station, King Edward Court, Peascod Street, etc).</p> <p>Strong cluster of A3/A4 uses at Royal Station.</p> <p>Generally attractive town centre environment.</p> <p>Popular visitor/ tourist destination with attractions including Windsor Castle and the River Thames.</p> <p>Windsor &amp; Eton Central railway station within convenient walking distance of shops and services.</p> <p>Strong mix of local, long established businesses.</p> <p>Programme of (ongoing) environmental improvements along Peascod Street.</p>	<p>No ‘major’ department store.</p> <p>Increasing vacancy rates.</p> <p>Steep gradient of Peascod Street (upper end) a potential barrier to pedestrian movements – both physiologically and physically.</p> <p>Declining retail offer towards the lower end of Peascod Street.</p> <p>Poor ‘arrival’ points from the south of the core shopping area.</p> <p>Poor connections and wayfindings (to/from the river and the coach park, for example).</p> <p>Expensive car parking, which deters shoppers and other town centre users.</p> <p>Lack of car parking close to shops and services.</p> <p>Lack of cycle facilities (racks, etc).</p> <p>Limited rail services.</p>
Opportunities	Threats
<p>Become a ‘top 100’ centre in the UK retail rankings – key to this is retaining and attracting major retailers.</p> <p>Enhance the ‘evening economy’ offer to create a better all-round experience for shoppers and other town centre users.</p> <p>Improve connections to/from the river and make better use of this local attraction.</p> <p>Increase the resident and worker population (principally through new development opportunities) to help enhance the vibrancy of the town centre and support its shops and services.</p> <p>Provision of high quality food and drink uses to serve town centre visitors and the resident and worker population.</p> <p>More town centre events and marketing.</p>	<p>New out-of-centre retail development.</p> <p>Continued growth of internet shopping and retailer polarisation (and downsizing) to a small number of prime locations.</p> <p>Increased competition from nearby centres including Reading and Bracknell.</p> <p>The tourist ‘tag’ distracting from local-based shopping and service needs.</p> <p>The difficulty in attracting new major retailers (in the light of retailer polarisation).</p> <p>Opportunities for new retail development constrained by conservation issues and heritage assets.</p>

As a shopping destination, Windsor Town Centre has an established ‘twin’ role – serving local, day-to-day shopping and service needs in addition to the needs of tourists/ visitors. It is, on the whole, a vital and viable town centre with a strong comparison retail offer; particularly in regards to mid-market multiple retailers and also some upmarket fashion retailers (principally focused at Windsor Royal Station). The relative strength of the retail offer, and the town’s general health, is underlined by Windsor’s rise in the UK retail rankings from 215<sup>th</sup> in 2010 to 107<sup>th</sup> in 2014.

While the town centre includes two department stores (Fenwick and Daniel of Windsor), it currently lacks a major department store. The achievement of such new provision in the town centre would enhance the prospects of Windsor becoming ranked a ‘top 100’ shopping destination in the UK, in our view.

The majority of the town’s retail attractions are focused at King Edward Court, Windsor Royal Station and the upper end of Peascod Street. These prime shopping areas comprise a strong, well integrated retail circuit with a high quality environment (albeit the upper end of Peascod Street would benefit from an extended programme of public realm improvements). These areas benefit from the proximity of Windsor Castle, which generates footfall and activity in this part of the town centre; while Windsor Royal Station’s food and drink offer is another important factor in this respect.

Information obtained on centre users’ views and behaviours indicate that users of Windsor Town Centre are generally satisfied with the town centre for shopping and services. That said, car parking is identified as a notable issue and an area for improvement. Key for Windsor Town Centre over the plan period, in our view, will be maintaining and enhancing its role in terms of providing for local-based shopping and service needs. To this end, the accessibility and cost of town centre car parking will be important in the face of increasing competition from nearby centres and out-of-centre shopping destinations.

Other qualitative needs, which we consider will help to ensure the vibrancy and prosperity of the town centre and, importantly, provide an improved all-round experience for locals and tourists/ visitors alike, include: strengthening the ‘evening economy’ offer including high quality food and drink uses; increasing the town’s resident and worker population; creating and marketing better connections to the town’s special attractions above and beyond Windsor Castle; and improving the general environment at key ‘arrival’ points.

## 1.4 MAIDENHEAD TOWN CENTRE

### 1.4.1 Diversity of uses

Figure 3.15 below sets out the composition of uses in Maidenhead Town Centre. This analysis focuses on a number of Experian Goad categories, namely:

- Comparison Retail (e.g. clothing and footwear, furniture, jewellery, electrical goods, toys);
- Convenience Retail (e.g. butchers, bakers, supermarkets);
- Retail Services (e.g. dry cleaners, hairdressers and beauticians, travel agents);
- Leisure Services (e.g. cafes, bars, restaurants);
- Financial & Business Services (e.g. banks, estate agents); and
- Vacant.

**Figure 3.15 – Diversity of uses, Maidenhead Town Centre (2014)**

Use Category	Units (count)	Units (%)	Floorspace (sq m)	Floorspace (%)
Comparison Retail	90	27.9%	21,637	32.3%
Convenience Retail	18	5.6%	12,626	18.9%
Retail Services	56	17.3%	6,187	9.2%
Leisure Services	68	21.1%	13,610	20.3%
Financial & Business Services	45	13.9%	6,587	9.8%
Vacant	46	14.2%	6,243	9.5%
<b>TOTAL</b>	<b>323</b>	<b>100%</b>	<b>66,890</b>	<b>100%</b>

Source: Experian Goad Category Report (June 2014).

There are 323 units in Maidenhead Town Centre, equating to 66,890 sq m of floorspace<sup>28</sup>. The main findings from our analysis include:

- The highest proportion of units and floorspace (27.9% and 32.3% respectively) are dedicated to Comparison Retail (i.e. clothing and footwear, mobile telephones, charity shops), as expected in a centre the size and nature of Maidenhead, followed by Leisure Services (21.1% and 20.3% respectively). The latter use category is performing an increasingly important role in successful centres, helping to enhance dwell time and improve the overall shopping experience.
- Retail Services (i.e. estate agents, health and beauty salons, hot-food takeaways) account for 17.3% of the total number of units in Maidenhead Town Centre; but only 9.2% of total floorspace. This indicates, as expected, that Retail Services occupy smaller-sized units.
- Conversely, only 5.6% of the total number of units are dedicated to Convenience Retail whereas this use category accounts for 18.9% of total floorspace. This is because the town centre’s foodstores (including but not limited to Sainsbury’s, Tesco Metro and Waitrose) occupy larger-sized units.

All successful centres require a balance of uses in order to encourage linked trips and to maintain their vitality and viability. As expected in Maidenhead Town Centre, Comparison Retail is the largest use category; exceeding Convenience Retail (broadly, the larger the centre the lower the proportion of floorspace attributed to Convenience Retail). However the role of Convenience Retail (especially foodstores) in anchoring town centres and driving pedestrian footfall should not be underestimated. Similarly, Leisure Services (particularly A3 food and drink uses) are performing an important role in successful centres and this trend is likely to continue. The more secondary uses in Maidenhead Town Centre, in terms of representation, are Retail Services and Financial & Business Services.

Figure 3.16 below sets out the composition of units dedicated to A1 Retail and Non-A1 Retail (i.e. A2-A5) in Maidenhead Town Centre over time. The composition remained broadly constant between 2010 and 2012; however, more recently (2014) there has been a marked increase in the number of units dedicated

<sup>28</sup> Floorspace (sq m) is Experian Goad gross floorspace.

to Non-A1 Retail. This may reflect national trends in retailing and the increasing importance of A3 leisure uses in response to changing consumer habits and needs.<sup>29</sup>

**Figure 3.16 –Use Classes composition by units, Maidenhead Town Centre (2010-2014)**

Use Class	2010 (February)	2012 (February)	2014 (June)
A1 Retail	209	204	164
Non-A1 Retail	102	102	113

Source: RBWM Use Classes Breakdown (2010 & 2012) and Experian Goad (2014).

#### 1.4.2 Vacancy rates

As shown in Figure 3.15 above, which is based on the latest Experian Goad Category Report for Maidenhead, in June 2014 there were some 46 vacant shop units in the town centre; or 14.2% as a proportion of the total number of units. The overall quantum of vacant floorspace in Maidenhead Town Centre is 6,243 sq m (9.5% of total floorspace).

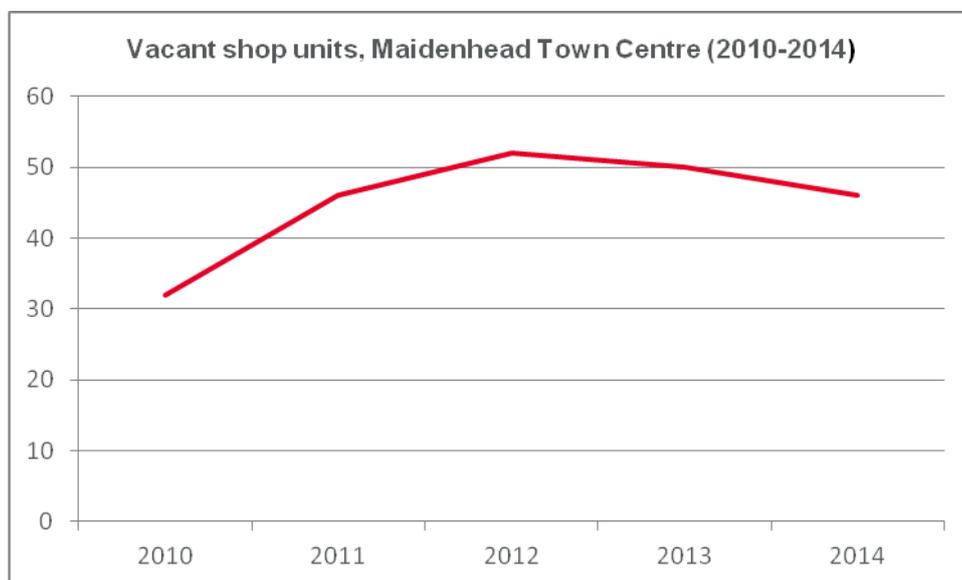
Figure 3.17 below shows vacancy rates in Maidenhead Town Centre over a five-year period. The total number of vacant shop units has increased by about 44% since 2010 (from 32 to 46). However, since ‘peaking’ in 2012 (52) in the midst of the UK recession, there are indications that this trend has been reversed and the town centre has reached a stable – albeit still rather high<sup>30</sup> – level of vacancies.

<sup>29</sup> However we would caution that the two datasets (RBWM Use Classes Breakdown and Experian Goad) used for the purpose of this analysis may not be entirely compatible in terms of the extent of the town centre survey area.

<sup>30</sup> For a town centre in the relatively prosperous Thames Valley.

**Figure 3.17 – Vacant shop units, Maidenhead Town Centre (2010-2014)**

Year	2010 (February)	2011 (February)	2012 (February)	2013 (July)	2014 (June)
Vacant shop units	32	46	52	50	46



Source: RBWM Use Classes Survey 2010-2013. Experian Goad Category Report 2014.

In regards to the distribution of vacancies in Maidenhead Town Centre, the Experian Goad survey (June 2014) identified 14 vacant shop units on Queen Street (11 of which were concentrated at its southern end between Broadway and King Street) and 9 vacant, predominantly smaller-sized shop units on High Street. The survey also identified a number of vacancies (13) dispersed throughout the Nicholsons Centre.

### 1.4.3 Retailer representation

Maidenhead Town Centre includes 20 of the 31 major retailers defined by Experian Goad, as shown in Figure 3.18 below:

**Figure 3.18 – Major retailers, Maidenhead Town Centre**

Department Stores	Mixed Goods Retailers	Supermarkets	Clothing	Other Retailers
Marks & Spencer	Argos Boots WH Smith Wilkinson	Sainsbury's (2) Tesco Waitrose	Burton Dorothy Perkins New Look Next Topman Topshop	Carphone Warehouse Clarks Clintons O2 Superdrug Vodafone

Source: Experian Goad, DTZ Update (February 2015).

Of the 31 major retailers, those not represented in Maidenhead Town Centre include the department stores of BHS, Debenhams, House of Fraser and John Lewis; and the clothing retailers of H&M, Primark and River Island. A principal reason for this is the relative status of the town centre, which is currently ranked 344<sup>th</sup> in the UK<sup>31</sup>. To that end, House of Fraser and John Lewis typically only locate in the top 40-50 ranked towns and other retail centres in the UK; while the others generally only locate in the top 150-200 locations.

The major retailers identified in Figure 3.18 above play a key anchor role in Maidenhead Town Centre, serving to enhance attractions and pedestrian footfall and, in turn, helping to sustain smaller retail and service businesses in the town centre. The majority of the major retailers are situated in the Nicholsons Centre and along the pedestrianised section of High Street. These areas further comprise other mainstream, multiple retailers (i.e. national 'chains' trading from multiple units but not defined as 'major' by Experian Goad) including the likes of Holland & Barrett, The Body Shop, Sports Direct, Ryman and Poundworld.

Maidenhead Town Centre's independent retail offer is relatively modest in quantum and range; however, there are small clusters of independents along Queen Street, King Street, Kingsway and parts of High Street. Such provision is important and helps to distinguish the town's retail offer which, overall, is lacking in choice and individuality – a problem for many secondary locations such as Maidenhead. The town centre benefits from a regular<sup>32</sup> Food Produce Market (High Street) and a monthly Farmers' Market (Grove Road car park), which help to create interest and activity in the town centre.

<sup>31</sup> Based on Retail Footprint rankings, 2014.

<sup>32</sup> The full market takes place on the first, third and fifth Saturday of the month; while a section of traders also trade on the first and third Thursday of the month.

#### 1.4.4 Commercial rents and yields

The level of rent which retailers are prepared to pay for retail space in a centre is an indication of the perceived strength of that centre. Promis<sup>33</sup> report that, at mid 2014, the average prime Zone A rent in Maidenhead Town Centre was £60 per sq ft; which is 50% below the pre-recession peak (£120 per sq ft).

In terms of commercial yields, which are an indicator of investor confidence in a centre (with lower yields indicating higher investor confidence in future rental growth), Promis report that retail yields in Maidenhead Town Centre were circa 6.25% at mid 2014.

#### 1.4.5 Pedestrian footfall

We outline below the indexed<sup>34</sup> levels of pedestrian footfall at 30 count points in Maidenhead Town Centre, on both weekdays and Saturdays, at select years since 2008. This provides a useful barometer of the relative 'busyness' and performance of various town centre locations over time.

The pedestrian footfall surveys were undertaken at 30 count points over a six-hour period (10.00-17.00). A plan of the count points in Maidenhead is provided at Appendix B.

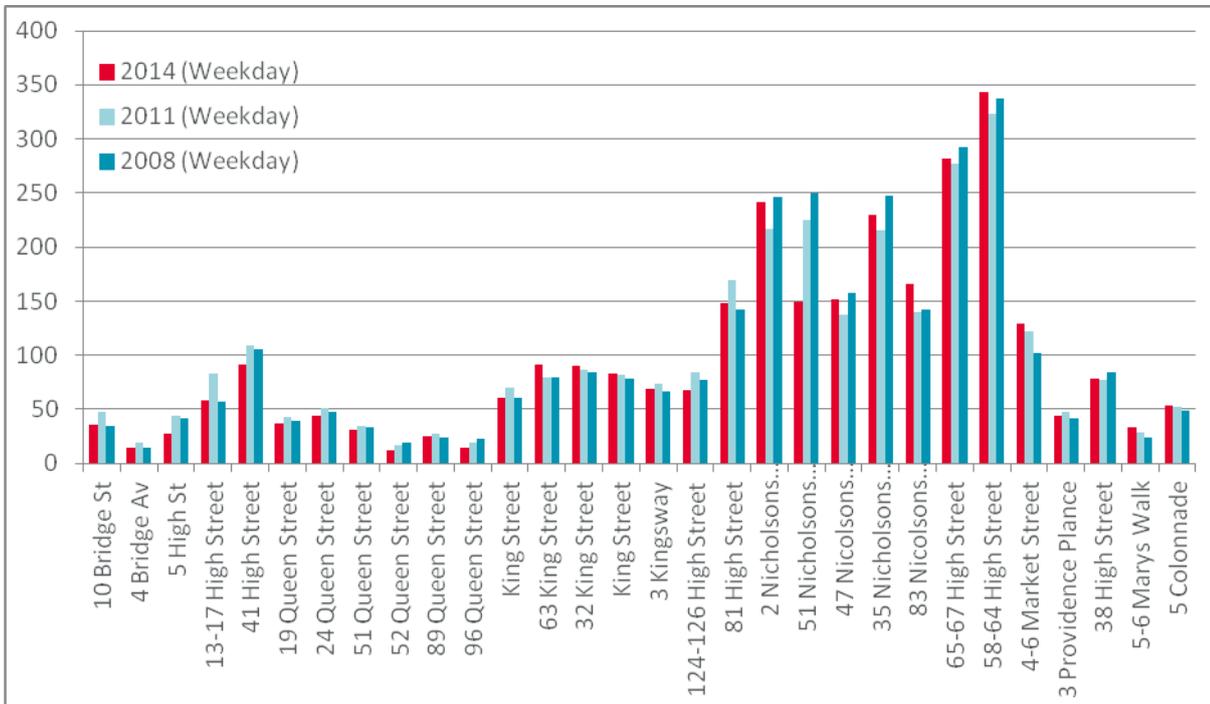
Figure 3.19 below shows (indexed) levels of pedestrian footfall in Maidenhead Town Centre on weekdays in October 2008, October 2011 and November 2014 respectively. Figure 3.20 relates to (indexed) levels of pedestrian footfall recorded on Saturdays – typically the main shopping day of the week.

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<sup>33</sup> Promis Retail Report – Maidenhead (February 2015).

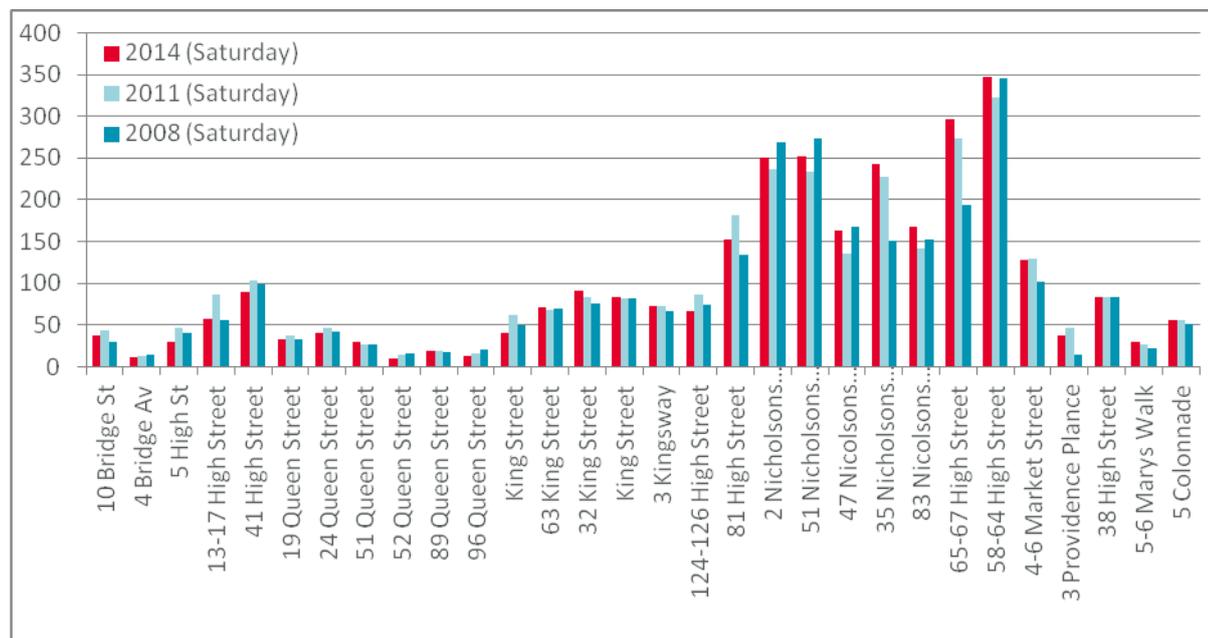
<sup>34</sup> Indices – as shown on the x-axis of Figures 3.19 and 3.20 – are percentages based on the average recorded 'flow' of all 30 count points (benchmarked at 100%) so as to indicate the locational hierarchy of pedestrian footfall throughout the town centre.

**Figure 3.19 – Weekday pedestrian footfall (indexed), Maidenhead Town Centre (2008, 2011 and 2014)**



Source: PMRS – Maidenhead Pedestrian Footfall Standard Reports.

**Figure 3.20 – Saturday pedestrian footfall (indexed), Maidenhead Town Centre (2008, 2011 and 2014)**



Source: PMRS – Maidenhead Pedestrian Footfall Standard Reports.

Figures 3.19 and 3.20 indicate broadly common trends in terms of the highest and lowest footfall locations in Maidenhead Town Centre, with count points along the High Street (namely those outside Marks & Spencer and McDonald’s) consistently the busiest locations in recent years. The next highest footfall locations were count points in the Nicholsons Centre, especially those along the Centre’s King Walk (which includes Tesco Extra, Next, WH Smith, etc) and close to its High Street Mall entrance.

Unsurprisingly, beyond the core shopping area, levels of pedestrian footfall in Maidenhead Town Centre dropped off – reflecting the fewer retail attractions. Locations with relatively low pedestrian footfall include Queen Street, Bridge Street/Avenue, King Street and the non-pedestrianised section of High Street.

#### 1.4.6 Centre users’ views and behaviours

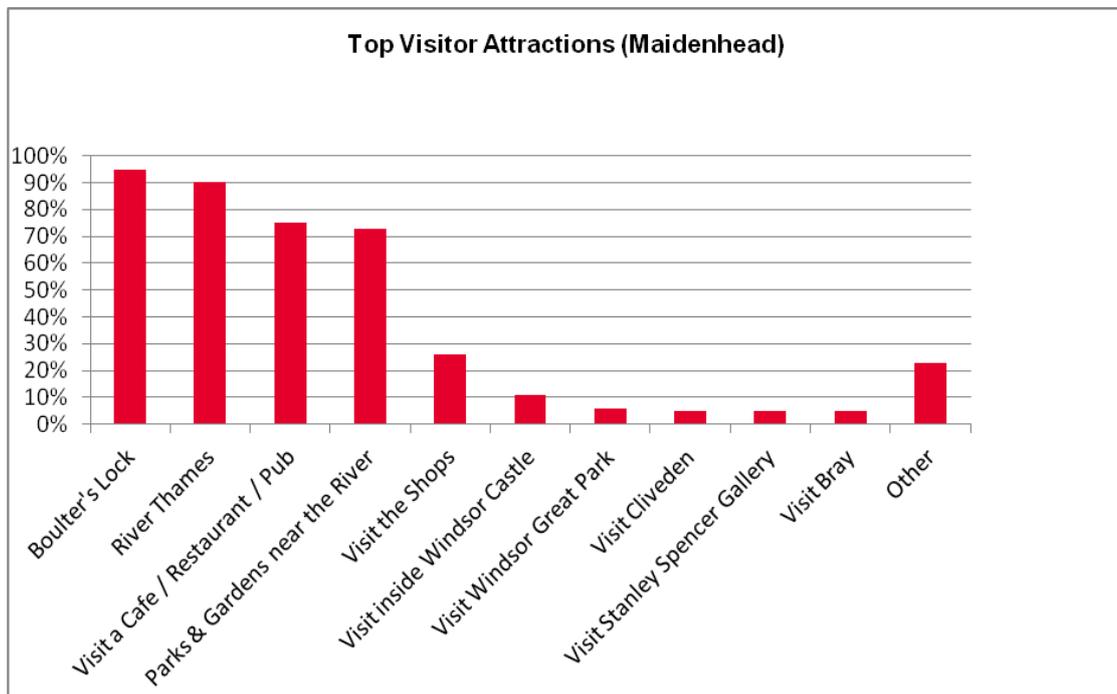
Information on Maidenhead Town Centre users’ views and behaviours has been obtained from two sources, namely:

- Maidenhead Visitor Survey 2014; and
- RBWM Household Interview Survey 2015.

In the first instance, we consider select findings from the on-street Maidenhead Visitor Survey 2014. This is based on a random survey sample of 200 visitors to Boulter’s Lock (a lock and weir on the River Thames to the east of the town) and the town’s core shopping area including High Street.

Figure 3.21 below shows the town’s top visitor attractions. The top visitor attraction is Boulter’s Lock, followed by the River Thames itself (although we would caution that such responses are likely to have been skewed by the surveys undertaken at these popular riverside locations). Other popular attractions include Maidenhead’s food and drink offer and its parks and gardens close to the River Thames. Less than 30% of visitors indicate that Maidenhead’s retail offer is the top visitor attraction.

**Figure 3.21 – Top Visitor Attractions, Maidenhead (2014)**



Source: TSE Research – Maidenhead Visitor Survey 2014.

Figure 3.22 below shows visitors’ satisfaction with shopping facilities (i.e. the retail offer) in Maidenhead. The majority of visitors (over 55%) consider the town’s range of shopping facilities to be good or very good, while almost 10% regard it to be poor. Over 60% of visitors consider the shopping environment in Maidenhead to be good or very good.

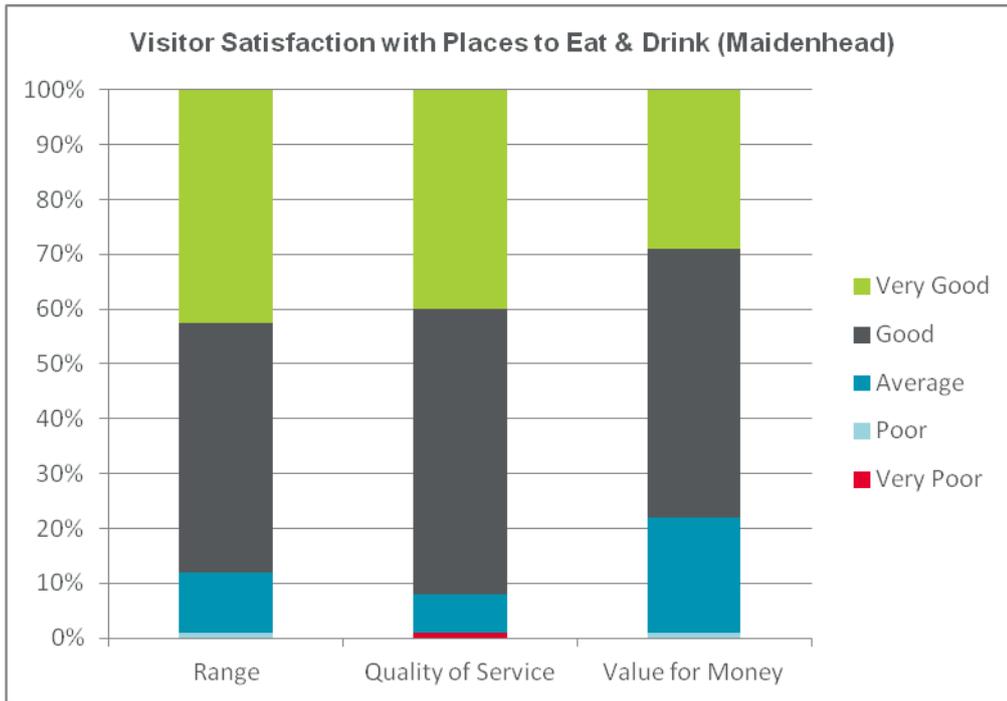
**Figure 3.22 – Visitor Satisfaction with Shopping Facilities, Maidenhead (2014)**



Source: TSE Research – Maidenhead Visitor Survey 2014.

Figure 3.23 below shows visitors' satisfaction with places to eat and drink in Maidenhead. Almost 90% of visitors consider the town's food and drink offer to be good or very good in terms of its range.

**Figure 3.23 – Visitor Satisfaction with Places to Eat & Drink, Maidenhead (2014)**

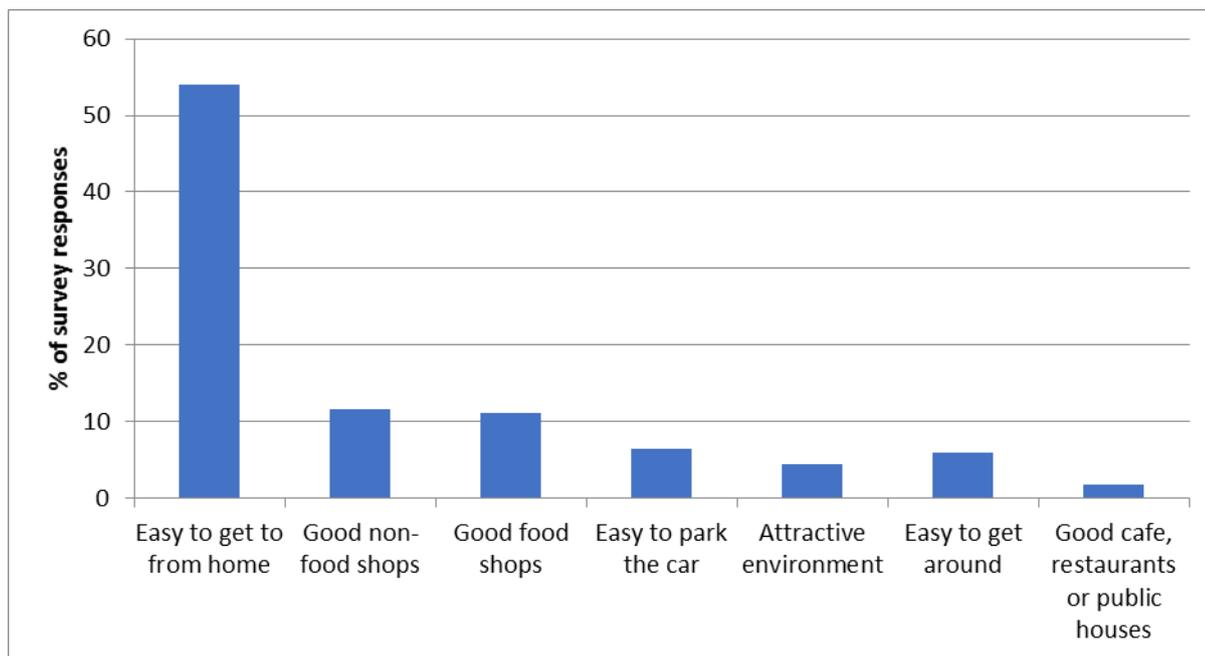


Source: TSE Research – Maidenhead Visitor Survey 2014.

In addition to the above, the results of the RBWM Household Interview Survey 2015 indicate the likes and dislikes of respondents who use Maidenhead Town Centre the most for shopping and services.

Figure 3.24 below shows what users of the town centre like the most about Maidenhead for shopping and services. The ease of getting to/from home is identified by over half (54%) of survey respondents as being their main like about the town centre. Collectively, good food shops and non-food shops make up almost a quarter of the responses (11.1% and 11.6% respectively); while 6.4% stated that it is easy to park the car.

**Figure 3.24 – Main ‘likes’ about Maidenhead Town Centre for shopping and services (2015)**

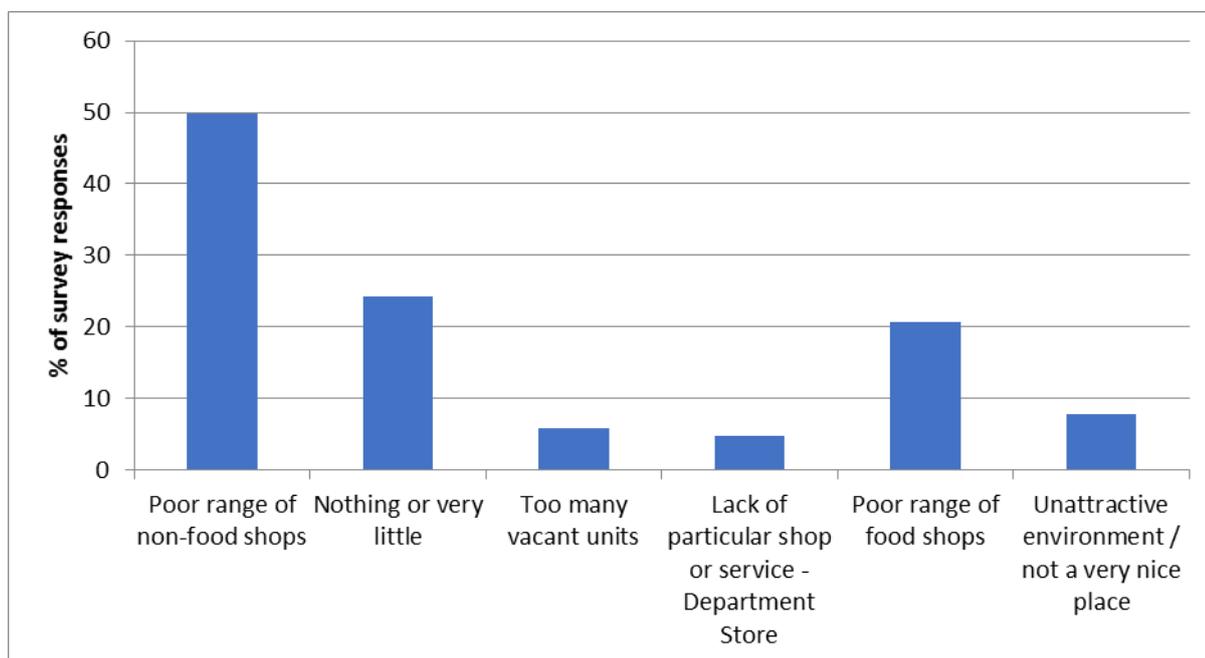


Source: RBWM household interview survey (2015).

Figure 3.25 below shows what users of the town centre dislike the most about Maidenhead for shopping and services. Users’ main dislike about the town centre is the poor range of non-food shops (49.8%). Other notable responses were the town’s poor range of food shops (20.6%), its unattractive environment (7.8%), and the perception of too many vacant units (5.9%).

Around a quarter (24.2%) of survey respondents stated that there is nothing or very little to dislike about Maidenhead Town Centre.

**Figure 3.25 – Main ‘dislikes’ about Maidenhead Town Centre for shopping and services (2015)**



Source: RBWM household interview survey (2015).

In summary, it is clear from the 2014 and 2015 survey information that users of Maidenhead Town Centre would like to see a better range of shops (particularly comparison retail), including a new department store.

#### 1.4.7 Accessibility

Some 80.3% of respondents who use Maidenhead Town Centre the most for shopping and services usually travel by car, according to the results of the 2015 household interview survey. Other responses include 7.6% by bus and 6.2% on foot, while only 1.8% of respondents travel to the town centre by train.

The A308 is the main vehicular route into Maidenhead Town Centre, with direct access to/from M4 Junction 8. Several other arterial routes (such as Bath Road, Cookham Road, etc) also serve the town centre. We consider the town centre to be reasonably well served by car parking, with notable provision at the Hines Meadow multi-storey car park (pay-and-display with circa 1,300 spaces) and the Nicholsons Centre multi-storey car park (pay-on-exit with circa 800 spaces). While pay-on-exit is preferable to pay-and-display in terms of providing the user with flexibility on the duration of their visit to the town centre, in our view, the pay-on-exit arrangement at the Nicholsons Centre car park is somewhat confusing and requires improved signage on entry. Further town centre car parking spaces are provided at Sainsbury’s (Providence Place) and at a number of predominantly smaller, surface level car parks adjacent to the A308.

Based on the results of the 2015 household interview survey, which asked respondents what they like and dislike about Maidenhead Town Centre, car parking provision performs relatively well (compared with Windsor Town Centre). Only 3.8% of respondents stated that it is difficult to park near the shops, and 2.3% consider car parking to be too expensive. By comparison, 6.4% of respondents who use Maidenhead Town Centre the most for shopping and services cited ease of parking as their main 'like' about the town centre.

Maidenhead railway station is situated to the southwest of the town centre, adjacent to the A308. First Great Western provides frequent services to/from London Paddington, Reading and Oxford; while less frequent services serve Marlow and Banbury. Crossrail, which is scheduled to open in 2017, will further enhance Maidenhead's accessibility by rail services.

Maidenhead is accessible by bus, with a number of bus stops located along the A308 and throughout the town centre including the non-pedestrianised section of High Street – close to its junction with Queen Street and the main retail attractions. Private bus operators run services to/from a number of surrounding towns (such as Windsor, Slough, High Wycombe, Bracknell, etc) and to/from local destinations and attractions including Boulter's Lock.

The main pedestrianised street in Maidenhead Town Centre is High Street, which comprises a number of key retail attractions (such as Marks & Spencer, Boots, Wilkinson, etc) and the two main entrances to the Nicholsons Centre (namely High Street Mall and Queens Walk). High Street is therefore one of the busiest locations in the town centre in terms of pedestrian footfall, as considered above. Other pedestrianised streets include King Street, which serves the Odeon-anchored leisure scheme, and Market Street, off High Street. Modern wayfindings throughout the town centre help to navigate pedestrians to key destinations including the railway station, car parks, Town Hall and retail and leisure attractions.

#### 1.4.8 Environmental quality

As considered in section 2 above, the quality of a town's physical environment is an important pre-requisite of attracting investment and providing shoppers and other town centre users with a positive all-round experience.

The quality of the environment in Maidenhead Town Centre is mixed although, on the whole, the town centre is clean and tidy and has very little graffiti and/or other apparent forms of vandalism. The headline findings from our town centre inspections include:

- One of the main pedestrian 'gateway' routes into the town centre, from Maidenhead railway station, is convoluted principally due to the busy A308 crossing.
- Queen Street is a busy vehicular route and suffers from a number of vacant, poorly maintained and/or unattractive shop units, particularly at its southern end (closest to the railway station). These factors serve to undermine the environmental quality of this part of the town centre.
- Nicholsons Centre provides a modern and pedestrian-friendly indoor shopping environment, with prominent entrances from High Street and dedicated access (via lifts) to the Centre's multi-storey car park.
- The pedestrianised section of High Street is currently the focus of repaving and public realm works including new, modern lighting and seating. At the time of our town centre inspections, such works had been completed at the eastern end of High Street (between Queen Street and the Nicholsons Centre's High Street Mall entrance) and had commenced at its western end. These ongoing works should set the benchmark for further environmental improvements in the town centre.

- The environmental quality of the non-pedestrianised section of High Street is generally sound and the main bus stops (shelters) are helpfully set back from the roadside, thereby reducing pavement clutter and barriers to pedestrian movement. However the road layout is narrow and, at the time of our town centre inspections, congestion was a problem; partly due to shop units being serviced from High Street.
- The pedestrianised section of King Street benefits from some modern street furniture (such as seating, planters, etc) at its northern end.

Further observations on the quality of the town centre environment can be drawn from the results of the 2015 household interview survey. Some 7.8% of respondents who use Maidenhead Town Centre the most for shopping and services cited the unattractive environment as their main ‘dislike’ about the town centre, while a further 5.9% stated that there are too many vacant shop units. In terms of the main ‘likes’ indicated by the survey results, respondents mentioned the town centre’s attractive environment (4.4%) and clean streets (1.6%).

#### 1.4.9 Perception of safety

Based on crime statistics sourced from the Thames Valley Police website, Figure 3.26 below shows the number of crimes reported in ‘Maidenhead Central’ including Maidenhead Town Centre between December 2010 and December 2014.

**Figure 3.26 – Number of crimes, Maidenhead Town Centre**

Year	2010 (December)	2011 (December)	2012 (December)	2013 (December)	2014 (December)
Number of crimes	224	198	163	171	148

Source: [www.thamesvalley.police.uk](http://www.thamesvalley.police.uk) (accessed February 2015).

Encouragingly, the number of crimes reported in Maidenhead Central has decreased considerably and consistently year-on-year since 2010. Most recently, as at December 2014, anti-social behaviour was the main type of crime (32 instances reported), followed by violence and sexual offences (30), shoplifting (19) and criminal damage and arson (18).

A very limited number of respondents to the 2015 household interview survey expressed views on their perception of town centre safety. Only 0.7% of respondents who use Maidenhead Town Centre the most for shopping and services considered good safety/security to be their main ‘like’ about the town centre. This compares with the 0.35% who indicated that the town centre does not feel safe.

1.4.10 SWOT analysis and conclusions

Figure 3.27 below identifies Maidenhead Town Centre’s Strengths, Weaknesses, Opportunities and Threats.

**Figure 3.27 – SWOT analysis, Maidenhead Town Centre**

Strengths	Weaknesses
<p>Established ‘critical mass’ of major and multiple retailers.</p> <p>Modern, pedestrian-friendly indoor shopping centre.</p> <p>Declining vacancy rates.</p> <p>Programme of (ongoing) environmental improvements in and around the core shopping area.</p> <p>A good range of town centre events, including but not limited to the Farmers’ Market.</p> <p>Cinema-anchored leisure scheme in well connected town centre location.</p> <p>Public transport accessibility.</p>	<p>Relative decline in the UK retail rankings.</p> <p>Small scale relative to major competitors such as Reading and (with new development there) Bracknell.</p> <p>Limited retail catchment area.</p> <p>Limited prospects for attracting new major retailers (in the light of retailer polarisation), including a new department store.</p> <p>Relatively high vacancy rates.</p> <p>The ring road creating a physical barrier and a poor ‘gateway’ route into the town centre from the railway station.</p> <p>The retail offer lacks choice and individuality.</p> <p>Fragmented town centre.</p>
Opportunities	Threats
<p>The arrival of Crossrail – including inward investment opportunities and improved public transport accessibility.</p> <p>Better facilities for car parking in and on the edge of the town.</p> <p>The reconfiguration/ reoccupation of prominent vacant shop units in the prime shopping area (i.e. Nicholsons Centre, High Street).</p> <p>Scope for new retail-led development (i.e. The Landing) to improve the town centre’s status and performance.</p> <p>A better, more distinguished independent retail offer.</p> <p>A campaign to improve the appearance and maintenance of shop units, including Queen Street (a main thoroughfare to/from the railway station).</p> <p>More food and drink uses (including family-orientated provision) to serve town centre visitors and the resident and worker population.</p>	<p>New out-of-centre retail development.</p> <p>Continued growth of internet shopping and retailer polarisation (and downsizing) to a small number of prime locations.</p> <p>Increased competition from nearby centres including Reading and Bracknell.</p> <p>Crossrail will make shopping in Central London more accessible.</p>

Maidenhead Town Centre has seen a decline in its UK retail ranking from 233<sup>rd</sup> in 2010 to 344<sup>th</sup> in 2014. While this (in part) is likely to reflect the relative improvement of similarly-ranked centres, we consider that it indicates a strong need for investment and improvement to ensure the town centre's vitality and viability over the plan period. The arrival of Crossrail to the town centre in 2019 should act as a catalyst for inward investment opportunities, and it will be important to create the environmental conditions to optimise such opportunities.

The town centre is represented by a range of major and multiple retailers, most of which are focused in the Nicholsons Centre and along the pedestrianised section of High Street. The retail offer lacks choice and individuality, however, and there is no major department store; thereby limiting the town's attractiveness as a shopping destination in the face of nearby competition. To this end, information obtained on centre users' views and behaviours indicate that users of Maidenhead Town Centre would like to see a better range of shops (particularly comparison retail), including a new department store. The town centre is further represented by a mix of smaller shops and services (multiple and independents) serving local-based needs.

Maidenhead Town Centre has relatively high, albeit declining, vacancy rates. A considerable proportion of these vacancies are concentrated on Queen Street and, somewhat surprisingly, the prime shopping areas of the Nicholsons Centre and High Street. This serves to detract from the overall environmental quality of the town centre. The main areas for environmental improvement include but should not be limited to Queen Street (a busy vehicular route and the main pedestrian 'gateway' route into the town centre from Maidenhead railway station) and the pedestrianised section of High Street (which we note is currently the focus of public realm improvements).

Other qualitative needs to help ensure the vitality and viability of the town centre include: securing new retail development (capable of attracting modern retailers); the reconfiguration/ reoccupation of prominent vacant shop units in the prime shopping area; increasing the town's family-orientated leisure offer including food and drink uses; and better car parking facilities in and on the edge of the town.

## 1.5 ASCOT DISTRICT CENTRE

### 1.5.1 Diversity of uses

Figure 3.28 below sets out the composition of uses in Ascot District Centre, based on the Experian Goad categories.

**Figure 3.28 – Diversity of uses, Ascot District Centre**

Category	Units (count)	Units (%)	Floorspace (sq m)	Floorspace (%)
Comparison Retail	18	32.1%	2,518	31.0%
Convenience Retail	5	9.0%	1,524	18.9%
Retail Services	12	21.4%	1,031	12.7%
Leisure Services	11	19.6%	1,579	19.5%
Financial & Business Services	8	14.3%	1,180	14.5%
Vacant	2	3.6%	279	3.4%
<b>TOTAL</b>	<b>56</b>	<b>100%</b>	<b>8,111</b>	<b>100%</b>

Source: Experian Goad Category Report (February 2013).

There are 56 units in Ascot District Centre, equating to 8,111 sq m of floorspace<sup>35</sup>. The main findings from our analysis include:

- The highest proportion of units and floorspace (32.1% and 31% respectively) are dedicated to Comparison Retail (i.e. clothing and footwear, jewellery).
- Unsurprisingly for a district centre such as Ascot, which primarily serves the day-to-day retail service needs of local residents and passers-by, Ascot district centre is well represented by Retail Services. The 12 such units account for 21.4% of the total number of units in the district centre, or 12.7% in floorspace terms.
- Despite a relatively low number (5) and proportion (9%) of units, Convenience Retail accounts for 18.9% of total floorspace. This is due to the presence of two convenience stores in Ascot district centre (namely Budgens and Tesco Express), which serve to inflate the quantum of floorspace dedicated to Convenience Retail.

<sup>35</sup> Floorspace (sq m) is Experian Goad gross floorspace.

- Ascot District Centre comprises a number of units occupied by Leisure Services (11) and Financial & Business Services (8), or 19.6% and 14.3% in terms of the proportion of total units.

### 1.5.2 Vacancy rates

As shown in Figure 3.28 above, which is based on the latest Experian Goad Category Report for Ascot, in February 2013 there were only two vacant shop units in the district centre; or 3.6% as a proportion of the total number of units. The overall quantum of vacant floorspace in Ascot District Centre is 279 sq m (3.4% of total floorspace). The two vacant shop units are located on the High Street, one centrally and the other at its eastern end.

### 1.5.3 Retailer representation

Ascot District Centre is represented by 3 of the 31 major retailers defined by Experian Goad; namely Boots, WH Smith and Tesco Express. These retailers serve to anchor the district centre and help to generate the pedestrian activity to support smaller shops and services.

The district centre further comprises a range of independent business services including health and beauty salons, estate agents, a butchers and a patisserie dispersed along the High Street.

### 1.5.4 Commercial rents and yields

Due to the size of the district centre, there is no published information on commercial rents and yields in Ascot.

### 1.5.5 Pedestrian flows

There is no published data on pedestrian footfall in Ascot District Centre. At the time of our district centre inspections, we observed the highest levels of footfall along the north side of High Street. This is to be expected given that the north side comprises the majority of the district centre's retail and service uses, including Tesco Express.

### 1.5.6 Centre users' views and behaviours

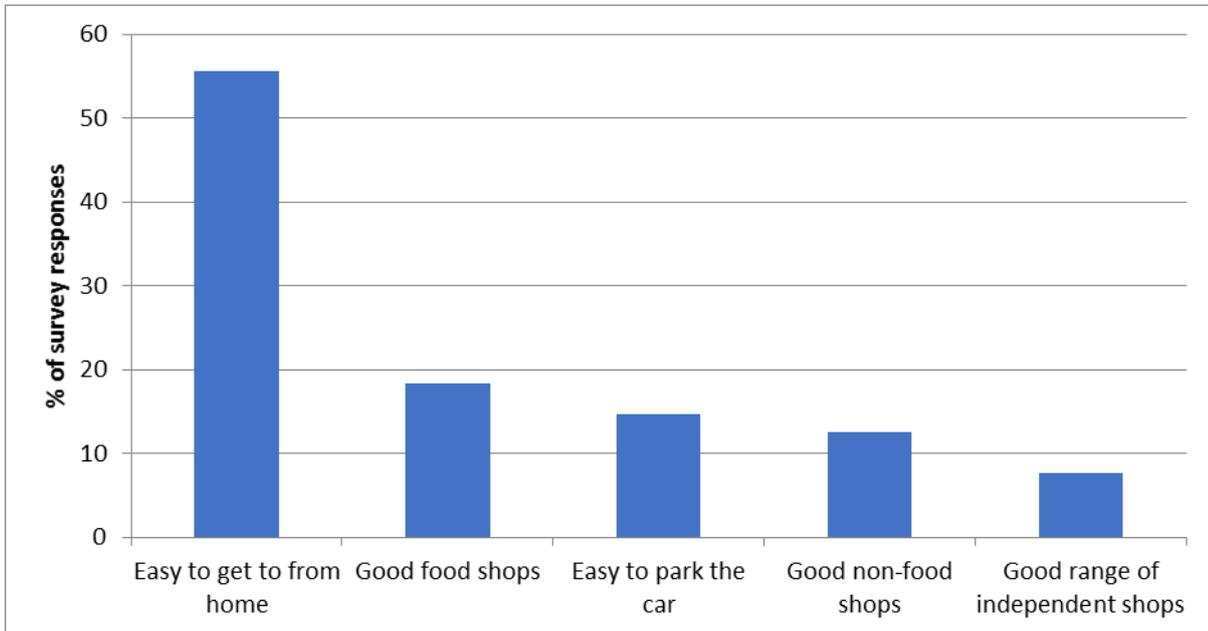
In order to establish the views and behaviours of those who use Ascot District Centre the most for shopping and services, we have had regard for the results of the RBWM Household Interview Survey 2015.

Figure 3.29 below shows what users of the district centre like the most about Ascot for shopping and services. Unsurprisingly, given the localised role and function of district centres, over half (55.6%) of users

of Ascot District Centre cited the ease of getting to/from home as their main like about the district centre. Users also regard the good food shops (18.3%) and the ease of car parking (14.7%) as key reasons for using Ascot District Centre the most for shopping and services (14.7%).

Some 7.7% of users cited a good range of independent shops as their main like about the district centre.

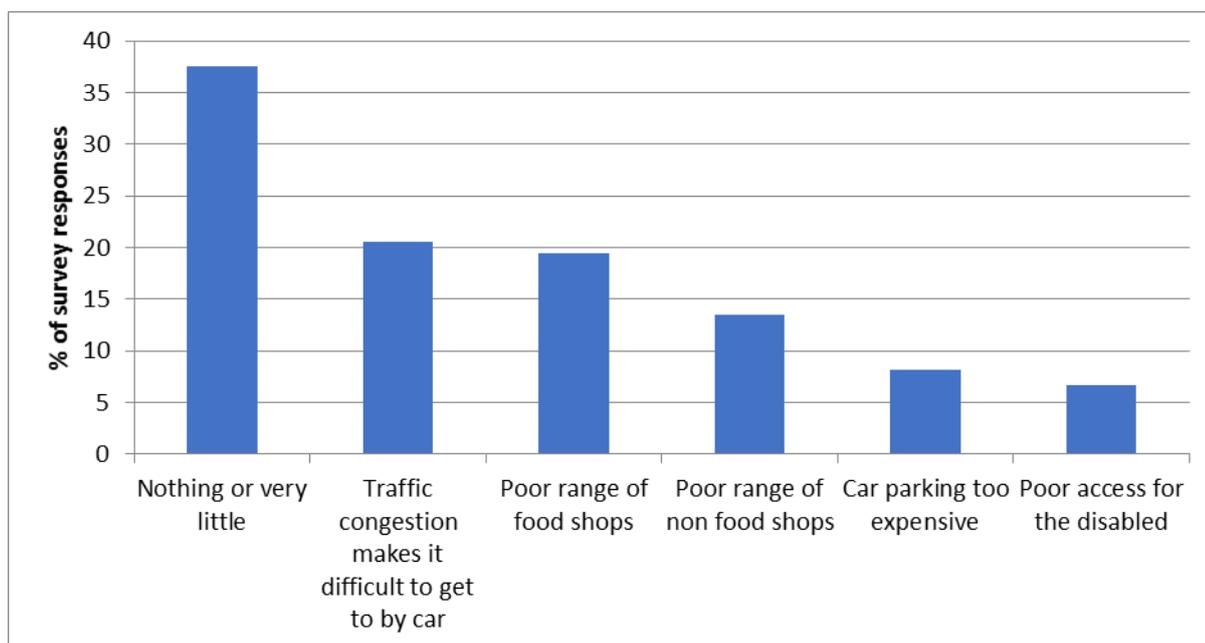
**Figure 3.29 – Main ‘likes’ about Ascot District Centre for shopping and services (2015)**



Source: RBWM household interview survey (2015).

Figure 3.30 below shows what users dislike the most about Ascot District Centre for shopping and services. Encouragingly, over a third (37.5%) of users stated that there is nothing or very little to dislike about Ascot District Centre for shopping and services. However, some 20.6% of users dislike the traffic congestion in the district centre, and 19.4% dislike the poor range of food shops. A further 13.5% of users consider Ascot District Centre to have a poor range of non-food shops.

**Figure 3.30 – Main ‘dislikes’ about Ascot District Centre for shopping and services (2015)**



Source: RBWM household interview survey (2015).

### 1.5.7 Accessibility

According to the results of the 2015 household interview survey, the dominant mode of travel for respondents who use Ascot District Centre the most for shopping and services is by car (79.3%), while 14.1% travel by bus. To that end, bus stops are located outside the Racecourse – close to the High Street/Station Hill roundabout and a short walk to/from the district centre’s shops and services.

The A329 (High Street) is the main vehicular route into Ascot District Centre. This route is lined with on-street car parking, particularly on the northern side, while off-street provision (excluding car parking associated with the Racecourse) includes the surface level car parks to the rear of Budgens and fronting Hermitage Parade’s shops and services. We consider there to be ample car parking. The ease of parking was cited by 14.7% of respondents to the 2015 household interview survey as their main ‘like’ about the district centre.

The district centre has a railway station (Ascot), albeit this is situated about 500m to the south of the district centre off Station Hill. South West Trains provide direct services to/from London Waterloo, Reading and Guildford.

### 1.5.8 Environmental quality

Ascot’s local environment is dominated by the Racecourse stadia and infrastructure. The district centre benefits from a high quality environment, with clean and well maintained streets and shop units. Planters and rows of hanging baskets add to the aesthetic quality of the district centre.

Traffic congestion (and associated noise) detracts from Ascot’s overall environmental quality, however. This view is supported by the results of the 2015 household interview survey, with some 20.6% of respondents citing traffic congestion as their main ‘dislike’ about the district centre.

### 1.5.9 Perception of safety

Crime statistics sourced from the Thames Valley Police website and shown in Figure 3.31 below indicate that, between December 2010 and December 2014, the total number of crimes recorded in Ascot (and the wider area including Sunningdale) decreased from 145 to 65; albeit in 2014 there was an increase on the previous year (58).

**Figure 3.31 – Number of crimes, Ascot District Centre**

Year	2010 (December)	2011 (December)	2012 (December)	2013 (December)	2014 (December)
Number of crimes	145	86	75	58	65

Source: [www.thamesvalley.police.uk](http://www.thamesvalley.police.uk) (accessed February 2015)

Most recently in December 2014, there were 15 recorded instances of theft within the area, while other main types of crime included violence and sexual offences (12), burglaries (10) and anti-social behaviour (9).

No respondents to the 2015 household interview survey expressed views on their perception of safety when visiting Ascot District Centre for shopping or services.

### 1.5.10 SWOT analysis and conclusions

Figure 3.32 below identifies Ascot District Centre’s Strengths, Weaknesses, Opportunities and Threats.

**Figure 3.32 – SWOT analysis, Ascot District Centre**

Strengths	Weaknesses
<p>Good visitor satisfaction.</p> <p>Low vacancy rate.</p> <p>Diverse retail offer, including comparison retail, for a centre of its size.</p> <p>Range of independent retailers and business services.</p> <p>Good retail anchors (Boots, WH Smith, Tesco Express, Budgens) which help to drive footfall and sustain smaller retailers and business services.</p> <p>Caters for local, day-to-day shopping and service needs.</p> <p>Car parking (including on-street) close to shops and services.</p> <p>Clean and well maintained streets and shop units.</p>	<p>Limited retail catchment area.</p> <p>Limited prospects for attracting new anchor retailers (in the light of retailer down-sizing).</p> <p>Busy vehicular route (High Street) and traffic congestion.</p> <p>Railway station relatively detached from shops and services.</p> <p>Limited prospects for retail diversification and/or expansion.</p>
Opportunities	Threats
<p>A more distinguished, better promoted independent retail offer.</p> <p>Improved traffic management.</p> <p>Passing/ race day trade and increased visitor numbers.</p>	<p>Increased competition from nearby centres.</p> <p>The loss of key retailer(s) as a result of down-sizing, which would have an adverse impact on footfall and the sustainability of smaller retailers and business services.</p>

Ascot is the Borough’s smallest district centre and performs well in its role of serving the day-to-day needs of local residents (as well as passers-by and occasional Racecourse visitors). Indicative of current its health, Ascot District Centre has a low vacancy rate with only two vacant shop units. The district centre is anchored by the major retailers of Boots, WH Smith and Tesco Express – which help to sustain Ascot’s smaller shops and services.

The district centre’s environmental quality is generally of a high standard, although traffic congestion along the High Street is a problem (as confirmed by the results of the 2015 household interview survey).

Overall, we consider that Ascot District Centre is vital and viable within the limitations of its small scale and localised nature.

## 1.6 SUNNINGDALE DISTRICT CENTRE

### 1.6.1 Diversity of uses

Figure 3.33 below sets out the composition of uses in Sunningdale District Centre, based on the Experian Goad categories.

**Figure 3.33 – Diversity of uses, Sunningdale District Centre**

Category	Units (count)	Units (%)	Floorspace (sq m)	Floorspace (%)
Comparison Retail	22	37.9%	3,122	32.3%
Convenience Retail	6	10.3%	2,258	23.3%
Retail Services	7	12.1%	762	7.9%
Leisure Services	9	15.5%	1,329	13.7%
Financial & Business Services	11	19.0%	1,133	11.7%
Vacant	3	5.2%	1,078	11.1%
<b>TOTAL</b>	<b>58</b>	<b>100%</b>	<b>9,682</b>	<b>100%</b>

Source: Experian Goad Category Report (February 2013).

There are 58 units in Sunningdale District Centre, equating to 9,682 sq m of floorspace<sup>36</sup>. The main findings from our analysis include:

- Comparison Retail (i.e. clothing and footwear, furniture) is the dominant use category in Sunningdale District Centre, with the highest proportion of units and floorspace (37.9% and 32.3% respectively). This is somewhat surprising given the typical localised role and nature of district centres.
- There are 6 Convenience Retail units (including Waitrose), which make up 10.3% of the total number of units. These units account for almost a quarter (23.3%) of the district centre's total floorspace.
- There is a relatively high proportion of units dedicated to Financial & Business Services in the district centre (19%), such as estate agents and banks. These uses account for 11.7% of the total floorspace.
- Sunningdale District Centre includes 9 units dedicated to Leisure Services (15.5%) and 7 units to Retail Services (12.1%). Such uses typically occupy smaller-sized units.

<sup>36</sup> Floorspace (sq m) is Experian Goad gross floorspace.

### 1.6.2 Vacancy rates

As shown in Figure 3.33 above, which is based on the latest Experian Goad Category Report for Sunningdale, in February 2013 there were only three vacant shop units in the district centre; or 5.2% as a proportion of the total number of units. The overall quantum of vacant floorspace in Sunningdale District Centre is 1,078 sq m (11.1% of total floorspace), some 860 sq m of which comprises the vacancy off Charters Road – close to Waitrose.

### 1.6.3 Retailer representation

Sunningdale District Centre has only one of the 31 major retailers defined by Experian Goad, namely Waitrose. This store is located at the western end of the district centre, off London Road, and serves to anchor the district centre.

There are a number of estate agents, as well as banks, health and beauty salons and furniture shops. In terms of convenience retail, the district centre includes a grocers, a delicatessen, an off licence and a butchers.

### 1.6.4 Commercial rents and yields

Due to the size of the district centre, there is currently no available information on commercial rents and yields.

### 1.6.5 Pedestrian flows

There is no published data on pedestrian footfall in Sunningdale District Centre. At the time of our site inspections, we observed that pedestrian footfall was primarily focused in the west of the district centre – close to the railway station, and Waitrose off London Road.

### 1.6.6 Centre users' views and behaviours

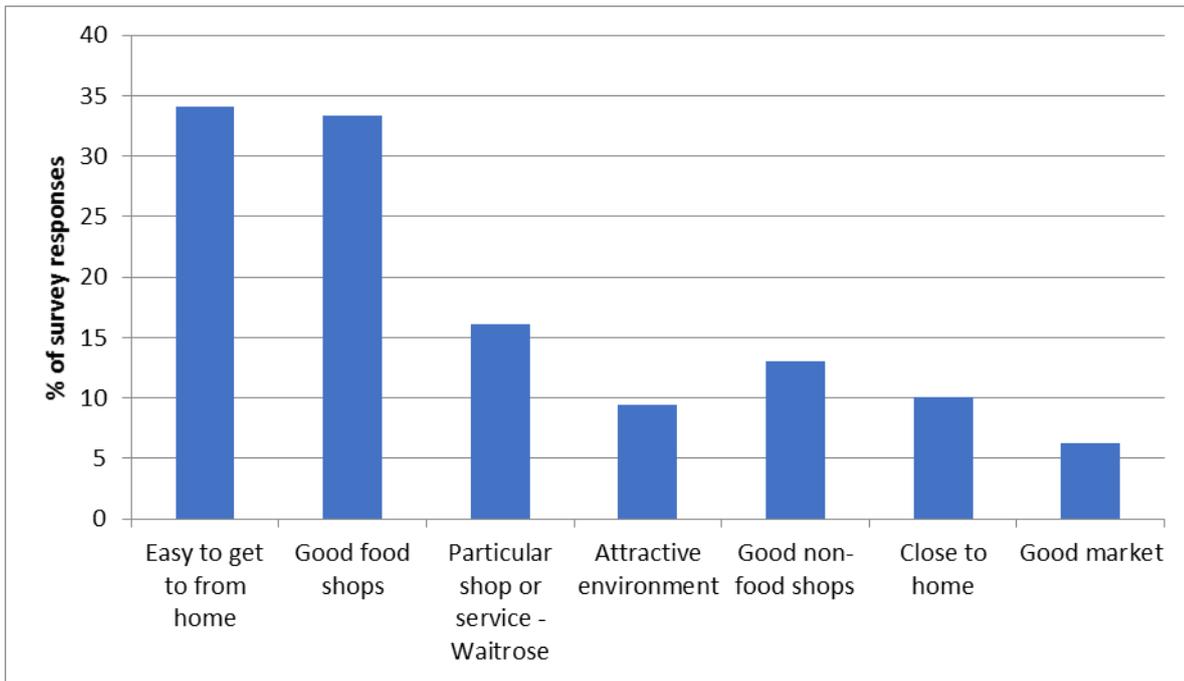
In order to establish the views and behaviours of those who use Sunningdale District Centre the most for shopping and services, we have had regard for the results of the RBWM Household Interview Survey 2015.

Figure 3.34 below shows what users of the district centre like the most about Sunningdale for shopping and services. Aside from the ease of getting to/from home (34.1% of survey respondents), the main like about Sunningdale District Centre for shopping and services is its good food shops (33.3%), which is likely

to be attributable to Waitrose. Indeed, some 16.1% of users specifically stated that Waitrose is what they like the most about the district centre.

Other notable responses include the district centre’s attractive environment (9.4%) and good market (6.3%).

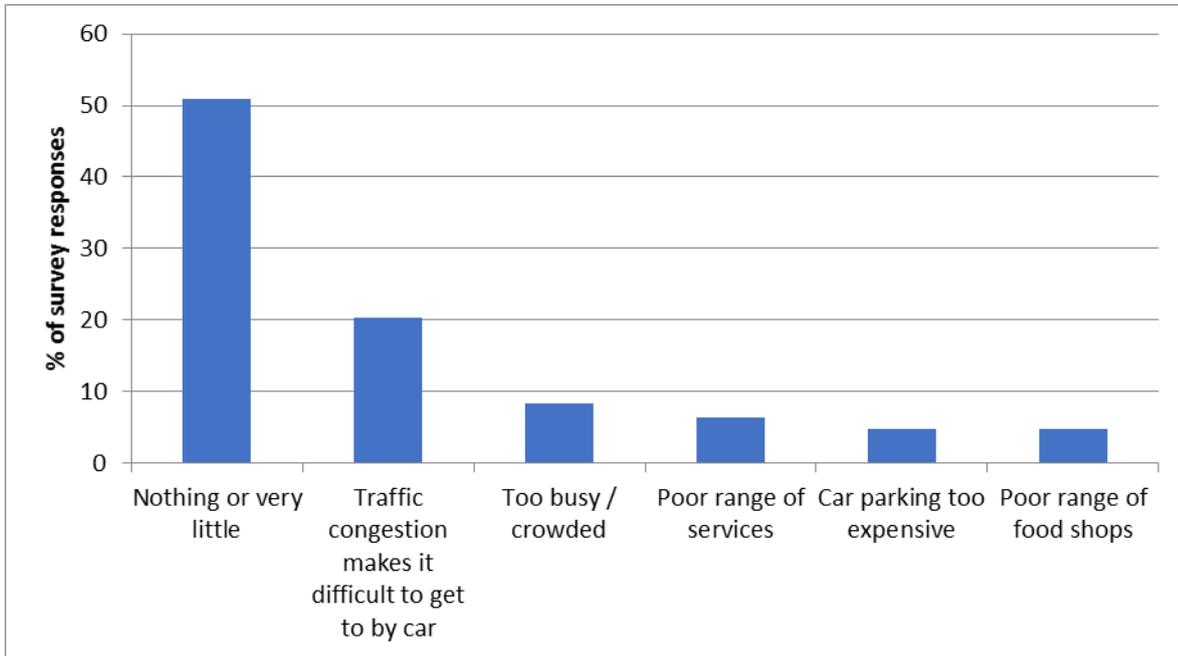
**Figure 3.34 – Main ‘likes’ about Sunningdale District Centre for shopping and services (2015)**



Source: RBWM household interview survey (2015).

Figure 3.35 below shows what users dislike the most about Sunningdale District Centre for shopping and services. Around half (50.9%) of the district centre’s users dislike nothing or very little about Sunningdale. The main dislike is traffic congestion (20.3%), while other notable dislikes include the perception that the district centre is too busy / crowded (8.4%); followed by poor range of services (6.3%) and car parking too expensive (4.7%).

**Figure 3.35 – Main ‘dislikes’ about Sunningdale District Centre for shopping and services (2015)**



Source: RBWM household interview survey (2015).

### 1.6.7 Accessibility

Around three-quarters (75.3%) of respondents who use Sunningdale District Centre the most for shopping and services usually travel by car, based on the results of the 2015 household interview survey, while some 11.6% travel by taxi. Surprisingly, but perhaps reflective of Sunningdale’s relative affluence and low density walk-in resident population, none of the survey respondents indicated that they usually travel on foot.

The main vehicular route serving Sunningdale District Centre is the A30 (London Road), which has good links to both the M3 and the M25. There is ample on-street car parking, while dedicated surface level car parks serve Waitrose, Sunningdale railway station, and the shops and services off Chobham Road. That said, none of the 2015 survey respondents cited the ease of parking as their main ‘like’ about the district centre.

In addition to rail services to/from London Waterloo, Reading and Aldershot (operated by South West Trains), the district centre is served by bus services to/from Ascot and Windsor. The main bus stops are situated close to Sunningdale railway station.

### 1.6.8 Environmental quality

The district centre has a high quality environment on the whole, with clean and well maintained streets. Planters, tree-lined streets (i.e. Chobham Road) and shop canopies help to create a ‘village’ feel in the district centre. The shopping environment is fragmented, however, with two distinct parts to the east and west (separated by, inter alia, the railway line and a cluster of residential uses).

Similarly to Ascot District Centre, traffic congestion (and associated noise) has an adverse impact on Sunningdale’s overall environmental quality. This view is supported by the results of the 2015 household interview survey, with some 20.3% of respondents citing traffic congestion as their main ‘dislike’ about the district centre.

### 1.6.9 Perception of safety

Crime statistics sourced from the Thames Valley Police website and shown in Figure 3.36 below indicate that, between December 2010 and December 2014, the total number of crimes recorded in Sunningdale (and the wider area including Ascot) decreased from 145 to 65; albeit in 2014 there was an increase on the previous year (58).

**Figure 3.36 – Number of crimes, Sunningdale District Centre**

Year	2010 (December)	2011 (December)	2012 (December)	2013 (December)	2014 (December)
Number of crimes	145	86	75	58	65

Source: [www.thamesvalley.police.uk](http://www.thamesvalley.police.uk) (accessed February 2015)

Most recently in December 2014, there were 15 recorded instances of theft within the area, while other main types of crime included violence and sexual offences (12), burglaries (10) and anti-social behaviour (9).

No respondents to the 2015 household interview survey expressed views on their perception of safety when visiting Sunningdale District Centre for shopping or services.

### 1.6.10 SWOT analysis and conclusions

Figure 3.37 below identifies Sunningdale District Centre’s Strengths, Weaknesses, Opportunities and Threats.

**Figure 3.37 – SWOT analysis, Sunningdale District Centre**

Strengths	Weaknesses
<p>Good visitor satisfaction.</p> <p>Low vacancy rate.</p> <p>Strong anchor retailer (Waitrose), which helps to drive footfall and sustain smaller retailers and business services.</p> <p>Strong independent retail offer, including comparison retail.</p> <p>Pleasant ‘village’ feel.</p> <p>High quality environment with clean and well maintained streets.</p> <p>Caters for local, day-to-day shopping and service needs.</p> <p>Railway station close to shops and services.</p>	<p>Limited retail catchment area.</p> <p>Traffic congestion.</p> <p>Limited prospects for attracting new anchor retailers (in the light of retailer down-sizing).</p> <p>Limited prospects for retail diversification and/or expansion.</p> <p>Fragmented shopping environment (east and west).</p>
Opportunities	Threats
<p>Improved traffic management.</p> <p>Passing trade.</p>	<p>Increased competition from nearby centres.</p> <p>A diluted retail offer including key independent retailers, which would have an adverse impact on footfall and the sustainability of the centre.</p>

Sunningdale District Centre is anchored by Waitrose (off London Road) and has a limited but varied mix of retail and service businesses, including independents, serving local-based needs. There are only three vacant shop units in the district centre, which is an indication of its relative health and attractiveness.

Similar to Ascot District Centre, Sunningdale District Centre’s attractive environment is undermined by traffic congestion (as confirmed by the results of the 2015 household interview survey); while the shopping environment is fragmented into two distinct parts to the east and west.

Overall, we consider that Sunningdale is a vital and viable district centre within the limitations of its small scale and localised nature.

## 4. Basis of Retail Capacity Forecasts

For the retail capacity forecasting in this Study, we have used our RECAP retail capacity forecasting Model. The RECAP Model is an empirical step-by-step model, based on the results of the 2015 RBWM household interview survey of shopping patterns as its method of allocating retail expenditure from catchment zones to shopping destinations. It is therefore not a theoretical gravity model, but is based on consumer responses about actual shopping patterns. It is also a growth allocation model; which allocates growth in expenditure to shopping destinations based on shopping patterns indicated by the household interview survey, and informed professional judgements about how these will be likely to change in the future as a result of committed or potential new retail developments.

We have modelled the following shopping destinations:

- Windsor Town Centre;
- Maidenhead Town Centre;
- Ascot District Centre;
- Sunningdale District Centre; and
- Non-central stores in Borough.

The RECAP Model forecasts the expenditure-based capacity for additional retail floorspace in the following way:

- Calculate the total amount of convenience and comparison goods expenditure which is available within the 9 zones comprising the catchment area;
- Allocate the available expenditure to Windsor Town Centre, Maidenhead Town Centre, Ascot District Centre, Sunningdale District Centre, and Non-central stores<sup>37</sup> in Borough (based on the results of the 2015 household interview survey of shopping patterns); so as to obtain estimates of current sales and forecast future sales in each shopping destination; and
- Compare the estimated sales in Windsor Town Centre, Maidenhead Town Centre, Ascot District Centre, Sunningdale District Centre, and Non-central stores in Borough with existing floorspace; so as to assess the current trading performance of each shopping destination, and the capacity to support further growth in convenience and comparison goods floorspace.

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<sup>37</sup> Including stores outside of the defined town/district centres.

The RECAP Model (like any other forecasting model of this type) is an exploratory tool, rather than a prescriptive mechanism. Thus the resulting forecasts serve as a realistic guide to planning policies and decisions on planning applications. Separate capacity forecasts have been prepared for Windsor Town Centre, Maidenhead Town Centre, Ascot District Centre, Sunningdale District Centre, and Non-central stores in Borough; in order to assist RBWM with identification and testing of alternative options for the town and district centres, developing a preferred strategy and formulating policies for new retail development.

When using the retail capacity forecasts as a guide to future planning policies, it is also important to remember that the further ahead the forecasting date, the less certain the forecast. Thus the forecasts for 2016 are more robust than those for 2031. In particular for 2026 and 2031, we suggest that forecasts such as these should be treated with some caution, since they only indicate the broad order of magnitude of retail capacity at this date, if all of the forecast trends occur. There are also particular uncertainties at the present time as a result of the recent economic recession, the financial and economic difficulties in the eurozone, and the continuing need for government austerity; for which there is very little precedent. It is therefore a matter of some conjecture as to the long term rate of economic recovery. Furthermore, long term growth in the use of internet shopping is unknown (although an assessment has been made in this Study), and reinforces the need to revise the forecasts of retail floorspace capacity before 2021.

We described below the principal data inputs, the development scenarios assessed, and the format of the RECAP Model tables.

### ***Principal Data Inputs***

#### *Catchment Area*

For this Study, the catchment area is informed by the results of the most recent previous household interview survey for RBWM (2005), together with those of recent household interview surveys undertaken for surrounding local planning authorities including Wycombe (2013) and Wokingham (2007).

The catchment area is wide enough to cover the area from which the Borough's shopping destinations capture significant market shares of available expenditure. As instructed by RBWM (in conjunction with Slough Borough Council), it is also wide enough to cover Slough Town Centre's catchment area; thereby enabling the household interview survey to establish shopping patterns for and shoppers' views on Slough Town Centre<sup>38</sup>.

This catchment area was divided into 9 catchment zones. A map of the catchment area showing these 9 zones is included in Appendix C. These zones were defined having regard to the results of previous surveys, and in order to obtain the most cost-effective sampling specification.

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<sup>38</sup> This is an evidence-sharing exercise between the respective Councils in the interests of the Duty to Cooperate. For the avoidance of doubt, this Study does not forecast the expenditure-based capacity for additional retail floorspace in Slough Town Centre based on the results of the 2015 household interview survey.

### *Base and Forecasting Years*

The new household interview survey was undertaken in January and February 2015, and we have used 2014 as our base year for the forecasts. The RECAP Model therefore provides estimates of the current retail sales in Windsor Town Centre, Maidenhead Town Centre, Ascot District Centre, Sunningdale District Centre, and Non-central stores in Borough as at 2014. As instructed by RBWM, we have prepared capacity forecasts at 2016, 2021, 2026 and 2031, so as to cover the forthcoming plan period.

### *Catchment Population*

The starting point for the population forecasts was a report, dated February 2015, commissioned from Pitney Bowes on the current and projected future population of each catchment area zone. These population forecasts cover the period up to 2025; and we have therefore extrapolated them to 2026 and 2031 by trend projection. The result is that for the catchment area as a whole the population is expected to increase from 463,595 in 2014 to 538,726 by 2031, which is an increase of about 16%.

The catchment zones are based on postcode geography and do not match local authority administrative boundaries. However, the 9 catchment zones adopted for the purpose of this Study cover and extend beyond RBWM's local authority boundary to reflect shopping patterns in the catchment area (i.e. the area from which the Borough's shopping destinations – in addition to Slough Town Centre for the reasons described above – capture significant market shares of available expenditure).

### *Price Basis*

All monetary values in this Study are in constant 2011 prices, unless otherwise stated, so as to exclude the effects of price inflation. Price conversions, for both comparison and convenience goods, from other price bases have been undertaken using Table 3.3 of 'Retail Expenditure Guide' 2014/2015 (Pitney Bowes & Oxford Economics).

### *Per Capita Expenditure*

For this Study, we obtained from Pitney Bowes a report setting out estimated average per capita expenditure on convenience and comparison goods in each catchment zone for the years 2012, 2013 and 2014, together with forecasts for 2019, 2024 and 2025. These estimates and forecasts take account of differences in average per capita expenditure on convenience and comparison goods from zone to zone. We have used these figures as the basis for our base year (2014) estimates and new forecasts. For the forecasting years of 2016 and 2021 we interpolated between the Pitney Bowes figures; and for our forecasting years of 2026 and 2031 we applied trend extrapolation to the Pitney Bowes figures. The resulting estimates and forecasts of per capita expenditure on both convenience and comparison goods, including expenditure on Special Forms of Trading, are set out in the top half of RECAP Model Table 2 in Appendix D.

The forecast growth in per capita expenditure in RECAP Model Table 2 is specific to the catchment area, and does not apply national average growth forecasts to the local catchment area base figures. Use of local growth forecasts is expected to be more reliable, as stated by Oxford Economics in the Pitney Bowes report for the catchment area:

*'The forecasts are taken from Oxford Economics published UK Macroeconomic forecasts and the local level estimates are modelled using various elements of the Economics Regional and Local forecasting services together with additional ONS data. The result is much more targeted to the prospects for a particular locality than simply taking the latest expenditure estimates for the area and growing them in line with national trend-based projections for the appropriate category of goods. This is partly because our consumer spending forecasts enable us to take account of changes in the underlying forces driving different elements of consumer spending in a much more sophisticated way than simply extrapolating trends. However, equally importantly, Oxford Economics' regional forecasts allow us to take account of how underlying differences in economic performance in different parts of the country are likely to affect relative spending power in different locations.'*

#### *Special Forms of Trading including internet shopping*

We have made deductions from the per capita expenditure figures supplied by Pitney Bowes to allow for expenditure via special forms of trading (SFT). This includes mail order, vending machines, party plan retailing, on-line shopping via the internet or interactive TV, and expenditure at temporary market stalls; and is therefore expenditure not made in retail shops. RECAP Model Table 2 shows the growing deductions which we have made, based on information for the UK published by Verdict Research Limited on growth in 'e-retail' (i.e. internet shopping and shopping via interactive TV) and forecast trends; and forecasts by Oxford Economics published in Pitney Bowes 'Retail Expenditure Guide' 2012/13. Figure 4.1 below shows Verdict's estimates for the proportion of all retail sales (both comparison and convenience goods) in the UK<sup>39</sup> in 2010 accounted for by electronic shopping, and its trend-based forecasts for 2015. This shows the proportion of such sales growing substantially over this period. For some categories of comparison goods, the proportion is already substantial and is expected to become much more so. Based on these, we have judged the deductions for SFT shown in RECAP Model Table 2. Our deductions:

- Assume a flattening of the growth trend throughout the forecasting period as internet shopping matures;
- Allow for the fact that internet shopping sales are included in the retail sales densities of some retailers which operate multi-channel retailing; and
- Include other SFT apart from the internet, in particular sales from temporary markets such as Farmers' Markets and other periodic street markets.

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<sup>39</sup> Local (i.e. Borough-specific) evidence of SFT is not available.

**Figure 4.1 – UK ‘e-retail’ Shopping Estimates and Forecasts**

Goods Type	Online sales as proportion of all UK retail sales (%)	
	2010	2015
<b>Comparison Goods:</b>		
Music & video	55.2	93.4
Electrical goods	28.0	37.2
Books	35.1	58.6
Homewares	9.0	12.8
DIY & gardening goods	5.5	6.4
Clothing & footwear	7.7	13.2
Furniture & floor coverings	4.2	6.6
Health & beauty	3.6	5.6
Other comparison goods	9.8	20.5
<b>All Comparison Goods</b>	<b>11.5</b>	<b>18.0</b>
<b>Convenience Goods:</b>		
Food & grocery	<b>3.8</b>	<b>5.8</b>

Source: Verdict Research Limited.

For comparison goods, Oxford Economics estimate that non-store retail sales (i.e. SFT) accounted for 11.5% of all comparison goods expenditure in the UK in 2010; and forecast that this will rise to 14.3% by 2015 and 14.7% by 2021<sup>40</sup>. Their estimate for 2010 is consistent with Verdict’s estimate for e-retail shopping alone in that year. However Oxford Economics’ forecasts are well below those of Verdict. For 2016 therefore, we have applied a SFT deduction which is between these two forecasts (15%), as indicated in RECAP Model Table 2 in Appendix D. For subsequent years we have assumed further growth in SFT at a higher rate than forecast by Oxford Economics in their ‘Central Case’, but lower than if Verdict’s trend was to be extrapolated. The bottom half of RECAP Model Table 2 shows forecast growth in per capita expenditure on comparison goods in each catchment zone, after deducting expenditure on SFT at the rates indicated in the table.

<sup>40</sup> Broad Definition and Central Case ‘Retail Expenditure Guide 2012/13’ (Table 3.1).

The combined effect of the forecast growth in population and in per capita expenditure is that (after deducting expenditure on SFT) we expect total catchment area expenditure on comparison goods (set out in RECAP Model Table 3 in Appendix D) to increase by about £1,227m (about 86%) over the period 2014 to 2031. This compares with growth in total catchment area population of around 16% over the period. Thus only a small proportion of the growth in catchment area expenditure on comparison goods is accounted for by forecast growth in population. This means that the comparison goods floorspace capacity forecasts are very insensitive to population growth and much more sensitive to the assumptions about growth in per capita expenditure, particularly in the later part of the forecasting period. The large increase in forecast expenditure on comparison goods indicates that a need for additional comparison goods retail floorspace will grow substantially to 2031 (particularly in the middle and later parts of this forecasting period). However, this should be reviewed at regular intervals over that period.

For convenience goods, Oxford Economics estimate that SFT accounted for 5.1% of all convenience goods expenditure in 2010; and forecast that this will rise to 6.5% by 2015 and 6.7% by 2021<sup>41</sup>. This is slightly higher than Verdict's estimates and forecasts for food & grocery sales alone, but includes other forms of SFT apart from internet shopping. After allowing for some internet sales from superstores and other retail outlets, and for other forms of SFT, we have adopted the SFT deductions for convenience goods expenditure set out RECAP Model Table 2.

### *Shopping Patterns in the Catchment Area*

For this Study, we designed and commissioned a new household interview survey of shopping patterns in the catchment area – the results of which are included at Appendix E. It covered the area shown on the map in Appendix C which was divided into the 9 catchment zones shown on that map. A total of 1,600 interviews were undertaken for us by NEMS Market Research in January and February 2015. These interviews were divided between the 9 catchment zones approximately in proportion to the population of each zone; but with adjustments to ensure that not less than 100 interviews were undertaken in any zone, and to optimise confidence limits within the budgeted limit of 1,600 interviews. Within each zone, the interviews were distributed as far as practicable in proportion to the distribution of population within the zone.

Details of the sampling specification for the household interview survey are set out in NEMS Market Research's technical report included at Appendix F.

The survey asked questions about households' shopping habits for main food and top-up food (i.e. convenience goods) shopping. The survey also asked questions about households' shopping habits for 8 different sub-categories of comparison goods shopping. These categories were closely matched to the international COICPO categories of retail expenditure to ensure compatibility with the RECAP Model. We combined the results of Questions 9 to 16 of the household interview survey to provide weighted average market shares of all comparison goods expenditure which are attracted to each shopping destination, using weights according to the amount of expenditure on each of these 8 sub-categories of comparison goods. These are set out in RECAP Model Table 7 for Windsor Town Centre, Table 15 for Maidenhead Town Centre, Table 23 for Ascot District Centre, Table 31 for Sunningdale District Centre, and Table 40 for the

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<sup>41</sup> Broad Definition and Central Case 'Retail Expenditure Guide 2012/13' (Table 3.1).

Non-central stores in Borough. The weighted averages are then corrected as described below, rounded to the nearest integer, and set out in RECAP Model Tables 8, 16, 24, 32 and 41 respectively.

### *Market Share Corrections*

The household interview survey provides a detailed picture of where households in each of the 9 catchment zones do most of their shopping for convenience goods and the 8 different categories of comparison goods. Its results do not directly indicate actual expenditure flows, but are the best available data to use as a proxy for modelling retail expenditure flows from residential areas to shopping destinations. However, like all such surveys, this means that its results cannot be applied uncritically in the RECAP Model. Thus for example, in our extensive experience, such surveys (undertaken by ourselves and by other consultants) tend to over-emphasise comparison goods shopping in large centres, and under-represent it in small centres<sup>42</sup>. The main reason is because in a small sample survey, the probability of interviewing the small number of people who use small centres is much less than the probability of interviewing the much larger number of people who use larger centres.

It is therefore sometimes necessary to introduce market share correction factors; so as to transfer expenditure in the Model from one or more locations to others, to balance (or calibrate) the Model and make it represent reality more accurately. This is not uncommon, and has been necessary in this case for some of the shopping destinations for comparison and/or convenience goods market shares.

These market share corrections do not alter the centres or retail parks themselves in any way, but are simply a means of calibrating the Model to make it as realistic as possible a representation of actual expenditure flows. There is an approximate correlation between centre size and average sales density, with larger centres generally having higher sales densities than smaller centres (and hence higher shop rental values). This experience has informed our judgements about the market share corrections needed to make the RECAP Model a realistic representation of sales in the Borough's shopping destinations.

Thus for Maidenhead Town Centre, for example, use of the comparison goods market shares from the 2015 household interview survey without correction would result in an unrealistically low sales density for the town centre. Respondents to the survey were asked where they do 'most of' their shopping for the 8 categories of comparison goods. However, we consider that the uncorrected survey results have underestimated the scale of expenditure in Maidenhead Town Centre. We have therefore increased the survey-indicated comparison goods market shares for every catchment zone by the market share correction factor of 130% indicated in the header to RECAP Model Table 16 (i.e. we have increased them by 30% from the no-change default factor of 100%). In terms of convenience goods market shares in Maidenhead Town Centre, we have decreased the survey-indicated market shares by the correction factor of 90% indicated in the header to RECAP Model Table 16 (i.e. we have decreased them by 10% from the no-change default

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<sup>42</sup> This is confirmed by the now revoked DCLG 'Practice Guidance' which states, '*Also, surveys that use simple questions about where people shop, provide answers that relate to trips and not spending flows. They can also overstate the importance of the larger centres and stores, and can understate the smaller and less frequently visited stores.*' (Appendix B, paragraph B.34).

factor of 100%). Adjustments for the other shopping destinations modelled are indicated in the equivalent RECAP Model tables, as appropriate.

These corrections to the survey-indicated market shares are our professional judgements, in the light of experience with undertaking a large number of such studies over many years. We therefore consider that the RECAP Model realistically represents the current patterns of shopping in the Borough's shopping destinations, and provides a reliable basis for forecasting future shop floorspace capacity.

#### *Visitor Expenditure*

We have made an allowance for visitor expenditure on convenience and/or comparison goods in Windsor Town Centre, Maidenhead Town Centre and Ascot District Centre<sup>43</sup>. For example, we have assumed that expenditure on comparison goods in Windsor Town Centre by visitors who live outside the catchment area amounts to 2% of expenditure by catchment area residents. This allowance for visitor expenditure would therefore account for spending arising from tourism, business visitors, etc. We consider that this is realistic for Windsor Town Centre.

Our assumptions in this respect for Windsor Town Centre, Maidenhead Town Centre and Ascot District Centre are indicated in RECAP Model Tables 13, 21 and 29 respectively.

#### *Existing Shop Floorspace*

We have obtained the details of existing occupied shop floorspace in the Borough's centres from Experian Goad; namely Windsor Town Centre (May 2014), Maidenhead Town Centre (June 2014), Ascot District Centre (February 2013) and Sunningdale District Centre (February 2013). In the case of Non-central stores in Borough, floorspace data has been sourced from IGD, Experian Goad, IGD and RBWM as appropriate. We have used these figures in our RECAP Model. For each shopping destination, lower and upper (including mezzanine) floors have been included.

#### *Committed Developments*

There is currently one notable committed retail development in the Borough's shopping destinations, namely 'Land West of Crown Lane' in Maidenhead Town Centre. Accordingly, we have included in RECAP Model Table 20 the new retail floorspace expected to come forward within this scheme. We understand that the scheme (application ref. 12/02762/OUT) has planning permission for 1,045 sq m net of new A1 retail floorspace, none of which is permitted for comparison goods floorspace in accordance with a condition of the planning permission. We assume that 314 sq m net (30%) will comprise convenience goods floorspace; and that the remainder (731 sq m net) will comprise A1 retail services such as dry cleaners, opticians and health and beauty salons.

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<sup>43</sup> We have made no such allowance for Sunningdale District Centre and Non-central stores in Borough, given that these shopping destinations are unlikely to secure significant expenditure from outside the catchment area.

In addition, there is currently some vacant retail floorspace in both Windsor and Maidenhead Town Centres. We have included a proportion of the vacant town centre retail floorspace in the RECAP Model (Tables 12 and 20 respectively) as committed development for comparison goods floorspace<sup>44</sup>; because it is likely that some of it will be reoccupied for retail use as the overall vitality and viability of the town centres improves over the plan period.

We have made assumptions relating to the actual proportion of vacant retail floorspace included in the Model as committed comparison goods floorspace. These assumptions are informed by the location and quality of such floorspace in Windsor and Maidenhead Town Centres (as follows).

- For Windsor Town Centre:
  - We have identified all vacant A1 shops within the existing Primary Shopping Area (totalling 1,140 sq m gross);
  - We have assumed that 50% of all vacant A1 shops comprise comparison goods floorspace, and that 40% of these will become occupied over the plan period.
- For Maidenhead Town Centre:
  - We have identified all vacant A1 shops within the existing Primary Shopping Area (totalling 2,660 sq m gross);
  - We have assumed that 50% of all vacant A1 shops comprise comparison goods floorspace, and that 30% of these will become occupied over the plan period.

We have excluded all vacant retail floorspace outside the Primary Shopping Areas, as we would not expect much of that floorspace to be reoccupied for comparison goods shopping. From past experience, we would expect much of it to be occupied by other uses, such as service businesses, in due course.

Given the very limited amount of vacant retail floorspace in Ascot and Sunningdale District Centres, no such floorspace is identified as committed development in the Model.

### ***Development Scenarios Assessed***

We have assessed the 'baseline' scenario (i.e. Scenario 1) for new strategic retail development in the Borough, in which we assume that the 2015 pattern of market shares of convenience and comparison goods shopping in Windsor Town Centre, Maidenhead Town Centre, Ascot District Centre, Sunningdale District Centre, and Non-central stores in Borough indicated by the household interview survey (corrected as described above) remains unchanged throughout the forecasting period to 2031. The implicit assumption in this scenario is that any new retail development in these shopping destinations does not change the market shares of expenditure attracted from the catchment area.

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<sup>44</sup> We have not assumed any committed development for convenience goods floorspace given the relevant dominance (proportionally) of comparison goods retailing within the town centres.

### ***Format of the RECAP Model Tables***

The RECAP Model Tables are set out in Appendix D. Tables 1 to 5 set out the population and expenditure forecasts for the catchment area. Tables 6 to 13 are the Scenario 1 tables for Windsor Town Centre. Tables 6 and 7 show the pattern of market shares of expenditure on each category of convenience and comparison goods respectively attracted from the catchment area, as indicated by the household interview surveys before correction. Table 8 shows the corrected market share patterns for all convenience and comparison goods expenditure in the town centre. Table 9 shows the amounts of expenditure on each comparison goods sub-category attracted, and the amounts of all comparison goods. Table 9 is the product of Table 5 and Table 7. Table 10 sets out forecast retail sales for both convenience and comparison goods, on a zone-by-zone basis and overall. Table 11 accounts for the sales capacity of existing main food and convenience goods shops in the town centre, and Table 12 sets out the committed town centre developments and their expected sales levels (for both convenience and comparison goods). Table 13 brings together the expenditure attracted, existing floorspace and committed developments, to arrive at the retail capacity forecasts for Windsor Town Centre. It also shows the overall market shares of total catchment area expenditure on convenience and comparison goods which are shown as attracted by the town centre.

Tables 14 to 21 are the Scenario 1 tables for Maidenhead Town Centre; Tables 22 to 29 are the Scenario 1 tables for Ascot District Centre; and Tables 30 to 37 are the Scenario 1 tables for Sunningdale District Centre. These tables follow the same arrangement as the tables for Windsor Town Centre.

Tables 38 to 46 are the Scenario 1 tables for Non-central stores in Borough. These tables follow the same arrangement as the tables for the Borough's town and district centres; however an additional table is included (Table 44) indicating 'benchmark' comparison goods sales in the existing out-of-centre retail warehouses and foodstores.

## 5. Quantitative Capacity for New Retail Development

In this section, we set out and describe our retail capacity forecasts for the Borough's shopping destinations as at the 2014 'baseline' year and throughout the forecasting period (i.e. 2016, 2021, 2026 and 2031). Accordingly, we indicate forecast capacity in Windsor Town Centre, Maidenhead Town Centre, Ascot District Centre, Sunningdale District Centre, and Non-central stores in Borough.

The convenience goods forecasts are summarised in Figure 5.1; and the comparison goods forecasts are summarised in Figure 5.2. In setting out our forecasts, we define convenience and comparison goods as follows:

**Convenience goods:** *Food, alcoholic drink, tobacco products, newspapers and periodicals, nondurable household goods.*

**Comparison goods:** *Clothing and footwear; household textiles and soft furnishings; Furniture and floor coverings; household appliances; audio visual equipment; hardware, DIY goods, decorating supplies; chemist and medical goods, cosmetics and beauty products; books, jewellery, watches, china, glassware and kitchen utensils, recreational, personal and luxury goods.*

### **Convenience Goods Forecasts**

Our forecasts of the capacity for new convenience goods floorspace in the Borough are summarised in Figure 5.1 below. This represents the 'baseline' Scenario 1 forecasts (i.e. no change in the 2015 survey-indicated convenience goods market shares throughout the forecasting period) for each separately modelled shopping destination. It further indicates the overall (i.e. combined) forecast capacity for convenience goods floorspace in the Borough.

**Figure 5.1**

Summary of Retail Capacity Forecasts: Convenience Goods - sq m net sales area (Source: RBWM RECAP Model 2015)

**Scenario 1**

Location	2016	2021	2026	2031	RECAP Model Table
Windsor Town Centre	-50	150	350	550	13
Maidenhead Town Centre	-650	-200	200	600	21
Ascot District Centre	50	100	150	200	29
Sunningdale District Centre	0	100	150	250	37
Non-central stores in Borough	150	350	500	700	46
<b>Combined Forecasts in Borough</b>	<b>-500</b>	<b>500</b>	<b>1,350</b>	<b>2,300</b>	n/a

Notes:

- (a) The forecasts are cumulative, i.e. the forecasts for each date include the forecasts for the previous dates and are not additional to those earlier forecasts.
- (b) The forecasts are for future retail capacity after allowing for the committed developments.
- (c) Floorspace figures from RECAP Model rounded to the nearest 50 sq m net.
- (d) The sub-totals and grand totals (i.e. combined forecasts) may not exactly equal the sum of their parts, owing to rounding.

Before we describe the convenience goods retail capacity forecasts in Figure 5.1, some additional general points should be noted.

First, the forecasts are all on the assumption that where retailers are shown by the RECAP Model to be trading above or below the level based on estimated company average levels, their sales densities will fall or rise to that company average based level. This is a conventional assumption in retail studies of this type. However, some stores may well continue to trade successfully above or below their company average sales density. The retail capacity forecasts should therefore be seen as realistic maxima, rather than targets which must be achieved through new development. By way of example; RECAP Model Table 46 shows that, we estimate, the existing convenience goods floorspace at (out-of-centre) Non-central stores in Borough was achieving an average sales density of £8,808 per sq m net in 2014. This figure is slightly above the combined 'benchmark' sales density of existing main food and convenience stores in the Borough's out-of-centre shopping destinations (£8,489 per sq m net) shown in RECAP Model Table 43. Our capacity forecasts for convenience goods floorspace therefore allow for sales to drop to that 'benchmark' level by 2016, before new floorspace becomes supportable by growth in expenditure. Thereafter, the forecasts assume that the average sales density of the existing floorspace remains constant from 2016 onwards. The same approach has been applied to all other shopping destinations modelled as appropriate.

Second, the convenience goods forecasts are all on the assumption that potential new floorspace will be provided in the form of new food superstores, trading at a 'generic' average sales density for such stores of £12,000 per sq m net. Whilst some food superstore operators trade above or broadly in line with this level (i.e. Asda, Morrisons, Sainsbury's, Tesco), other types of supermarket including some but not all discount supermarkets trade below £12,000 per sq m net. In addition, Marks & Spencer, Co-op and Waitrose trade below this average sales density; the principal reason being such stores typically sell convenience goods at a lower density. Thus the format in which new convenience goods floorspace is provided will affect the amount of such floorspace which can be supported in terms of retail capacity. If it is provided only in the form of discount supermarkets, for example, the forecast growth in expenditure would be sufficient to support substantially more floorspace than indicated in Figure 5.1. At this time, it is of course not possible to predict over the forecasting period the format in which potential food store developments might come forward. It will therefore be necessary to review the implications for retail capacity in each shopping destination when specific proposals for new stores come forward, taking account of the format of the proposed stores and their likely occupiers.

Third, we have made no allowance for increases in sales densities of convenience goods floorspace over the forecasting period. This is because convenience goods sales densities have not been rising across the board over the last few years. For some retailers they have risen but for others they have fallen. However, at the next review of the forecasts, the most up-to-date sales densities should be used, so as to take account of any changes in real terms.

Fourth, although our forecasts distinguish between town/district centres and out-of-centre shopping destinations, this is merely for forecasting convenience and reliability. It does not mean that any capacity forecast as 'non-central' should be accommodated in the form of out-of-centre development. Rather, the sequential approach should be applied, and new developments to accommodate any of the forecast need should be located in or on the edge of the town/district centres subject to identifying sufficient, potential opportunity sites, in preference to out-of-centre locations.

Taking each of the Borough's shopping destinations modelled in turn, we describe below our convenience goods retail capacity forecasts set out in Figure 5.1:

#### *Windsor Town Centre*

Table 13 of the RECAP Model shows that, we estimate, the existing convenience goods floorspace in Windsor Town Centre was achieving an average sales density of £9,197 per sq m net in 2014. This figure is slightly below the combined 'benchmark' sales density of existing main food and convenience stores in the town centre (£9,472 per sq m net) shown in RECAP Model Table 11. Our capacity forecasts for convenience goods floorspace therefore allow for sales to rise to that 'benchmark' level by 2016, before new floorspace becomes supportable by growth in expenditure. Thereafter, the forecasts assume that the average sales density of the existing floorspace remains constant from 2016 onwards.

On this basis, Figure 5.1 shows that under Scenario 1, in which the town centre's 2015 market shares remain unchanged throughout the forecasting period, there will be a nominal theoretical over-supply of convenience goods floorspace in Windsor Town Centre in 2016, before increasing to about 150 sq m net by 2021, about 350 sq m net by 2026 and about 550 sq m net by 2031; if forecast trends occur. These 'baseline' forecasts demonstrate that there is limited expenditure-based capacity to support additional convenience goods floorspace in Windsor Town Centre over the forecasting period. Any additional provision in the town centre is likely to comprise C-store formats and/or hard discounters (consistent with the national trends outlined in section 2 of this Study).

Assuming the transfer of forecast growth in convenience goods floorspace from out-of-centre locations (i.e. the Non-central stores in Borough modelled) to Windsor Town Centre, and subject to identifying a suitable site or sites in accordance with the sequential approach, the town centre should have the capacity to support a greater quantum of convenience goods floorspace (of around 850 sq m net by 2026 and around 1,250 sq m net by 2031) with no increase in the market shares of catchment area expenditure attracted.

#### *Maidenhead Town Centre*

Table 21 of the RECAP Model shows that, we estimate, the existing convenience goods floorspace in Maidenhead Town Centre was achieving an average sales density of £9,949 per sq m net in 2014. This figure is slightly below the combined 'benchmark' sales density of existing main food and convenience stores in the town centre (£10,916 per sq m net) shown in RECAP Model Table 19. Our capacity forecasts for convenience goods floorspace therefore allow for sales to rise to that 'benchmark' level by 2016, before new floorspace becomes supportable by growth in expenditure. Thereafter, the forecasts assume that the average sales density of the existing floorspace remains constant from 2016 onwards.

On this basis, Figure 5.1 shows that under Scenario 1, in which the town centre's 2015 market shares remain unchanged throughout the forecasting period, there will be a theoretical over-supply of convenience goods floorspace in Maidenhead Town Centre until the later part of the forecasting period. We forecast limited capacity for additional convenience goods floorspace by 2026 (about 200 sq m net), increasing to about 600 sq m net by 2031; if forecast trends occur. These 'baseline' forecasts demonstrate that there is limited expenditure-based capacity to support additional convenience goods floorspace in Maidenhead Town Centre over the forecasting period. Similar to Windsor Town Centre, any such provision is likely to comprise C-store formats and/or hard discounters.

If, however, all (or a greater share of) forecast growth in convenience goods floorspace was to be transferred from Non-central stores in Borough to Maidenhead Town Centre instead of Windsor Town Centre (as considered above), and subject to identifying a suitable site or sites in accordance with the sequential approach, the town centre should have the capacity to support a greater quantum of convenience goods floorspace (of around 700 sq m net by 2026 and around 1,300 sq m net by 2031) with no increase in the market shares of catchment area expenditure attracted

#### *Ascot District Centre*

Table 29 of the RECAP Model shows that, we estimate, the existing convenience goods floorspace in Ascot District Centre was achieving an average sales density of £7,723 per sq m net in 2014. This figure is slightly above the combined 'benchmark' sales density of such provision (£7,380 per sq m net) shown in RECAP Model Table 27. Our capacity forecasts for convenience goods floorspace allow for sales to drop to that 'benchmark' level by 2016, before new floorspace becomes supportable by growth in expenditure.

Thereafter, the forecasts assume that the average sales density of the existing floorspace remains constant from 2016 onwards.

On this basis, Figure 5.1 shows that under Scenario 1, in which Ascot District Centre's 2015 market shares remain unchanged throughout the forecasting period, there will be very limited capacity for additional convenience goods floorspace in the district centre (only about 50 sq m net by 2016 rising to about 200 sq m net by 2031); if forecast trends occur. In accordance with the sequential approach, forecast growth in convenience goods floorspace at Non-central stores in Borough should be transferred to and accommodated in the Borough's town/district centres, potentially including Ascot District Centre in the form of an appropriate scale and nature of retail development on a suitable site.

#### *Sunningdale District Centre*

Table 37 of the RECAP Model shows that, we estimate, the existing convenience goods floorspace in Sunningdale District Centre was achieving an average sales density of £9,817 per sq m net in 2014. This figure is comparable with the combined 'benchmark' sales density of such provision (£9,990 per sq m net) shown in RECAP Model Table 35. That said, our capacity forecasts for convenience goods floorspace allow for sales to rise to that 'benchmark' level by 2016, before new floorspace becomes supportable by growth in expenditure. Thereafter, the forecasts assume that the average sales density of the existing floorspace remains constant from 2016 onwards.

On this basis, Figure 5.1 shows that under Scenario 1, in which Sunningdale District Centre's 2015 market shares remain unchanged throughout the forecasting period, there will be very limited capacity for additional convenience goods floorspace in the district centre (with no capacity by 2016 and about 250 sq m net by 2031); if forecast trends occur. In accordance with the sequential approach, forecast growth in convenience goods floorspace at Non-central stores in Borough should be transferred to and accommodated in the Borough's town/district centres, potentially including Sunningdale District Centre in the form of an appropriate scale and nature of retail development on a suitable site.

#### *Non-central stores in Borough*

Table 46 of the RECAP Model shows that, we estimate, the existing convenience goods floorspace in Non-central stores in Borough was achieving an average sales density of £8,808 per sq m net in 2014. This figure is slightly higher than the combined 'benchmark' sales density of existing main food and convenience stores in these out-of-centre locations (£8,489 per sq m net) shown in RECAP Model Table 43.

Our capacity forecasts for convenience goods floorspace allow for sales to drop to the combined 'benchmark' level by 2016, before new floorspace becomes supportable by growth in expenditure. Any forecast capacity thus takes into account the likely over-trading of some existing provision in out-of-centre locations (most likely the Windsor Tesco on Dedworth Road). Thereafter, the forecasts assume that the average sales density of the existing floorspace remains constant from 2016 onwards.

On this basis, Figure 5.1 shows that under Scenario 1 for Non-central stores in Borough, in which the 2015 market shares remain unchanged throughout the forecasting period, there will be limited capacity for additional convenience goods floorspace in 2016 (about 150 sq m net), increasing to about 350 sq m net by 2021, about 500 sq m net by 2026 and about 700 sq m net by 2031; if forecast trends occur.

As described above, these capacity figures should be accommodated in the Borough's town centres if at all possible, or on the edge of these centres, in a retail format appropriate to such a location (in accordance with the sequential approach). Alternatively, it may be appropriate for the Borough's district centres to support some of this forecast growth in convenience goods floorspace.

### ***Comparison Goods Forecasts***

Our forecasts of the capacity for new comparison goods floorspace in the Borough are summarised in Figure 5.2 below. This represents the 'baseline' Scenario 1 forecasts (i.e. no change in the 2015 survey-indicated comparison goods market shares throughout the forecasting period) for each separately modelled shopping destination. It further indicates the overall (i.e. combined) forecast capacity for comparison goods floorspace in the Borough.

As with convenience goods, the capacity for additional out-of-centre comparison goods floorspace has been distinguished in the RECAP Model for that in town/district centres merely for forecasting convenience and reliability. It does not mean that forecast capacity should be accommodated in the format of relatively low sales density out-of-centre retail warehouses. New floorspace should be located in accordance with the sequential approach, rather than out-of-centre retail warehouses, wherever possible.

We have assumed that new floorspace forecast for Non-central stores in Borough would trade at typical average sales densities for (non-food) retail warehouses. However, in the event that the forecast capacity or any part of it can be accommodated in town centre, or edge-of-centre, format developments, the capacity would be less than forecast in Figure 5.2 below; because town centre format retail floorspace trades at higher sales densities than retail warehouses. Also, if some was to be accommodated in food/non-food superstores, the capacity would be less than forecast; because their comparison goods sales densities are higher than those of most retail warehouses. The summary figures (i.e. combined forecasts) in the bottom row of Figure 5.2 reflect this, and assume that all new comparison goods floorspace would trade at town centre format sales densities.

**Figure 5.2**

Summary of Retail Capacity Forecasts: Comparison Goods - sq m net sales area (Source: RBWM RECAP Model 2015)

**Scenario 1**

Location	2016	2021	2026	2031	RECAP Model Table
Windsor Town Centre	500	2,400	4,100	5,350	13
Maidenhead Town Centre	100	1,250	2,300	3,050	21
Ascot District Centre	50	150	200	250	29
Sunningdale District Centre	50	150	200	250	37
Non-central stores in Borough	50	350	650	850	46
<b>Combined Forecasts in Borough</b>	<b>700</b>	<b>4,150</b>	<b>7,150</b>	<b>9,450</b>	n/a

Notes:

- (e) The forecasts are cumulative, i.e. the forecasts for each date include the forecasts for the previous dates and are not additional to those earlier forecasts.
- (f) The forecasts are for future retail capacity after allowing for the committed developments.
- (g) Floorspace figures from RECAP Model rounded to the nearest 50 sq m net.
- (h) The sub-totals and grand totals (i.e. combined forecasts) may not exactly equal the sum of their parts, owing to rounding.

Taking each of the Borough’s shopping destinations modelled in turn, we describe below our comparison goods retail capacity forecasts set out in Figure 5.2:

*Windsor Town Centre*

Table 13 of the RECAP Model shows that, we estimate, the existing comparison goods floorspace in Windsor Town Centre was achieving in 2014 an average sales density of £5,546 per sq m net. This is a realistic sales density for a town centre of this size and type, and the catchment it serves.

In order to allow a substantial proportion of the growth in expenditure to support existing shops, we have assumed that the sales density of the existing town centre floorspace will grow at 2.5% per annum from 2014 onwards. This allocates about 50% of the growth in expenditure to existing shops and about 50% to new floorspace. This estimated growth in sales is based on our professional judgement, and assumes that the existing town centre floorspace will become more efficient (by 2.5% per annum) from 2014 onwards. Such efficiencies are more likely to be achieved within the town centre’s larger and modern shops (i.e. King Edward Court) as opposed to smaller, less flexible formats in the secondary/tertiary shopping areas.

On this basis, Figure 5.2 shows that under Scenario 1, in which the town centre’s 2015 market shares remain unchanged throughout the forecasting period, there will be capacity for about 500 sq m net of new

comparison goods floorspace in the town centre in 2016, rising to about 2,400 sq m net by 2021, about 4,100 sq m net by 2026 and about 5,350 sq m net by 2031; if forecast trends occur. Thus, further into the forecasting period, there is potential for growth in Windsor Town Centre.

Further, some of the potential growth in comparison goods floorspace, which is forecast for out-of-centre locations (i.e. the Non-central stores in Borough modelled) should, if at all possible, be accommodated within the Borough's town centres including Windsor Town Centre in accordance with the sequential approach. Assuming the transfer of forecast growth in comparison goods floorspace from out-of-centre locations to Windsor Town Centre, and subject to identifying a suitable site or sites for new retail development, the town centre could support a greater quantum of additional floorspace (than forecast under Scenario 1) with no increase in the market shares of catchment area expenditure attracted.

#### *Maidenhead Town Centre*

Table 21 of the RECAP Model shows that, we estimate, the existing comparison goods floorspace in Maidenhead Town Centre was achieving in 2014 an average sales density of £4,496 per sq m net. This is a realistic sales density for a town centre of this size and type, and the catchment it serves, and below the average sales density achieved in Windsor Town Centre (primarily reflecting the nature and quality of the retail offer).

Our capacity forecasts allow for 2.5% per annum growth in the sales density of the existing town centre comparison goods floorspace from 2014 onwards; consistent with that for Windsor Town Centre (as described above).

Figure 5.2 shows that under Scenario 1 with no changes in 2015 market shares, there will be limited capacity for comparison goods floorspace in 2016 (about 100 sq m net) before rising to about 1,250 sq m net by 2021, about 2,300 sq m net by 2026 and about 3,050 sq m net by 2031; if forecast trends occur.

A greater quantum of comparison goods floorspace could be supported in Maidenhead Town Centre assuming the transfer of forecast growth in such floorspace from out-of-centre locations (i.e. the Non-central stores in Borough modelled). This would be subject to identifying a suitable site or sites<sup>45</sup> in accordance with the sequential approach.

#### *Ascot District Centre*

As indicated in RECAP Model Table 29, we estimate that the existing comparison goods floorspace in Ascot District Centre was achieving in 2014 an average sales density of £2,991 per sq m net. Figure 5.2 above shows that, under Scenario 1 with no changes in 2015 market shares, there will be very limited capacity for additional comparison goods floorspace over the forecasting period (by 2031 we forecast capacity for about 250 sq m net); if forecast trends occur.

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<sup>45</sup> Such as The Landing site identified for mixed use (including retail) development in the Maidenhead Town Centre Area Action Plan and currently the subject of a pending planning application.

### *Sunningdale District Centre*

As indicated in RECAP Model Table 37, we estimate that the existing comparison goods floorspace in Sunningdale District Centre was achieving in 2014 an average sales density of £2,983 per sq m net. Similar to Ascot District Centre, Figure 5.2 above shows that under Scenario 1 there will be very limited capacity for additional comparison goods floorspace in Sunningdale District Centre over the forecasting period (by 2031 we forecast capacity for about 250 sq m net); if forecast trends occur.

### *Non-central stores in Borough*

We estimate that existing out-of-centre retail warehouses, plus the Windsor Tesco on Dedworth Road, are currently achieving a comparison goods sales density of £2,266 per sq m net (RECAP Model Table 46). This sales density is substantially lower than Windsor Town Centre (£5,546 per sq m net) and Maidenhead Town Centre (£4,496 per sq m net), because the Non-central stores in Borough modelled comprise retail warehouses including Homebase, Carpetright, Halfords, Maplin and Pets at Home; which typically achieve a lower sales density than town centre retail floorspace. Our capacity forecasts allow for 2.5% per annum growth in the sales density of the existing comparison goods floorspace at Non-central stores in Borough from 2014 onwards (consistent with that for the Borough's town/district centres).

Figure 5.2 shows that under Scenario 1, with no changes in 2015 market shares throughout the forecasting period, there will be little or no capacity for additional comparison goods floorspace at Non-central stores in Borough in 2016 (about 50 sq m net), rising to about 350 sq m net by 2021, about 650 sq m net by 2026 and about 850 sq m net by 2031; if forecasts trend occur. As described above, however, such forecast growth should be located in, or on the edge of, town centres in accordance with the 'town centres first' approach of the NPPF.

### ***Retail Sector Analysis (Comparison Goods)***

RECAP Model Table 47 shows the 2015 market shares of expenditure on each category of comparison goods, which we estimate are attracted by the Borough's shopping destinations from the catchment area. It also shows the combined market shares attracted by these shopping destinations.

Table 47 shows that Windsor Town Centre secures vastly higher market shares on clothing and footwear (20.1%) compared with Maidenhead Town Centre (7.3%) – reflecting the former's broader, higher quality fashion-orientated retail offer – and also on 'all other comparison goods' including books, jewellery, and personal and luxury goods. However, Maidenhead Town Centre secures higher market shares of expenditure on medical goods/ beauty products (14.4% compared with Windsor's 7.9%) and marginally higher market shares on 4 of the remaining 5 categories of comparison goods.

Non-central stores in Borough secure the highest market shares of catchment area expenditure on DIY goods and hardware (11.5%). This is largely attributable to the Homebase at Maidenhead Retail Park. Given the nature of Non-central stores in Borough, such stores account for limited expenditure on the 'non-

bulky goods' categories such as clothing and footwear, medical goods/ beauty products and 'all other comparison goods'.

Ascot and Sunningdale District Centres both secure their highest market shares of expenditure on medical goods/ beauty products (1.6% and 2.4% respectively). Shopping patterns for these types of comparison goods are generally localised in nature, and therefore it is unsurprising that the Borough's district centres perform better in this respect. Their performance regarding other comparison goods categories (for which little or no market shares are secured) reflects their scale and role in the Borough's hierarchy of shopping centres.

While the Borough's overall comparison goods market shares are generally modest, one needs to bear in mind the proximity and retail offer of High Wycombe, Reading and Slough (including out-of-centre retail parks), which secure considerable market shares from the catchment area<sup>46</sup>.

### ***Use and Review of the Forecasts***

We must emphasise that all expenditure-based forecasts of future shop floorspace capacity are based on imperfect data and contain a number of assumptions. Our forecasts set out in this Study are based on the most up-to-date and reliable information currently available to us. However, they are intended as an indication of the likely order of magnitude of future shop floorspace capacity (if forecast trends are realised) rather than as growth targets or rigid limits to future growth. The forecasts should be periodically revised as necessary, as advised above, in the light of actual population and expenditure growth, and as development proceeds and its effects become measurable.

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<sup>46</sup> The results of Questions 9-16 of the 2015 household interview survey (refer to Appendix E) provide market shares of each category of comparison goods expenditure which are attracted from the catchment area to these shopping destinations. Estimating the extent of actual expenditure outflows is beyond the scope of this Study, however.

## 6. Review of Potential Development Opportunities

Our retail capacity forecasts set out and described in section 5 identify capacity for additional retail floorspace in the Borough’s centres over the plan period. Most of this capacity is focused within Windsor and Maidenhead Town Centres, which sit at the top of the Borough’s hierarchy of shopping centres.

We therefore set out below our commercial review of potential development opportunities in the Borough’s centres. To that end, the NPPF requires local planning authorities to identify sites to accommodate new retail development in accordance with the ‘town centres first’ approach. Figure 6.1 below provides a list of such potential opportunities, as agreed in consultation with RBWM and its partners.

**Figure 6.1**

*Potential Development Opportunities in the Borough*

	Sites
Windsor Town Centre	W1: Peascod Quarter W2: West of King Edward Court
Maidenhead Town Centre	M1: Broadway Opportunity Area M2: West Street Opportunity Area M3: York Road Opportunity Area M4: Railway Station Opportunity Area M5: High Street East / York Stream Opportunity Area M6: Stafferton Way Opportunity Area
Ascot District Centre	A1: Ascot Green
Sunningdale District Centre	None

We assess below the retail development potential of each of these sites.

### **Windsor Town Centre**

#### *W1: Peascod Quarter*

This site is broadly bound by Peascod Street, Bachelors Ache, Victoria Street and James Street. It is situated close to the southern edge of the town’s Primary Shopping Area and currently includes a mix of land uses.

Whilst not currently available, we consider that an opportunity exists to make better use of this site – particularly given its core location in the town centre. We understand that the site consists of two considerable, majority land ownerships. Subject to early and proactive landowner engagement and the

achievement of site assembly (and the relocation of existing land uses if required), the site is potentially available for redevelopment within the plan period.

We consider the site to be suitable for comprehensive residential-led mixed use development including complementary retail and leisure uses at ground floor. Any redevelopment would improve the streetscape in this location and serve to increase the town centre's resident population which, as considered in section 2 of this Study, can help to create vibrancy and support other main town centre uses including retail and leisure.

In a town centre constrained by conservation issues and heritage assets, we acknowledge that this site is the largest potential development opportunity in proximity to the Primary Shopping Area. That said, it is physically and physiologically separate from the town's main shopping streets and pedestrian thoroughfares at present. A more retail-intensive scheme (relative to complementary ground floor uses as part of a residential-led scheme) would require, as a minimum, clear prominence from and linkages with Peascod Street and King Edward Court in particular.

#### *W2: West of King Edward Court*

This site includes the existing Fenwick store and (at least part of) the adjacent multi-storey car park which, we understand, is a potential development opportunity for more intensive retail uses. We also understand that the site falls within a single ownership.

The site lies within the Primary Shopping Area and is well related to the town's main retail attractions. As identified in our town centre healthcheck at section 3, the paved 'square' to the immediate east (front) of the Fenwick store is currently under-utilised; and therefore presents an opportunity to extend and reconfigure the retail space. A scheme of this nature could potentially come forward in isolation (i.e. without involving the multi-storey car park) and provide an opportunity for a new or extended department store, for example, in the early part of the plan period.

Any redevelopment scheme involving the multi-storey car park would need to compensate for the resultant loss of town centre car parking (we note from the survey of town centre users that car parking is identified as a problem and an improvement action). Therefore such a scheme may require an innovative design solution – potentially with car parking above or below ground and/or store level – which would impact on scheme viability.

Subject to the achievement of a feasible and commercially viable redevelopment scheme focusing on the existing Fenwick store and the adjacent multi-storey car park, we consider that this site represents a prime opportunity for new retail development (potentially including a new or extended department store) over two, potentially three storeys within the plan period.

### ***Maidenhead Town Centre***

#### *M1: Broadway Opportunity Area*

This site – also known as ‘The Landing’ – is situated to the south of the Primary Shopping Area, to the immediate west of Queen Street. It currently forms the subject of an application for outline planning permission (ref. 15/00420/OUT).

The site is identified as an Opportunity Area in the Maidenhead Town Centre AAP (Policy OA1), specifically as the highest priority area for major retail led mixed use development in the town centre. To that end, Policy OA1 outlines proposals for 25,000 sq m gross of retail floorspace, 6,000 sq m gross of office floorspace, 190 residential units, and complementary leisure provision.

We note that the current application (relative to the provisions of Policy OA1) proposes a much smaller quantum of retail floorspace for the site. It is not the purpose of this Study, however, to critically review the merits or otherwise of The Landing application.

We consider that this site is the most suitable town centre site for accommodating some of the identified forecast capacity for new retail development (as considered in section 5). It presents opportunities to provide much-needed modern retail space with links to/from the Primary Shopping Area, including the Nicholsons Centre and High Street.

#### *M2: West Street Opportunity Area*

This site is situated to the immediate north of High Street and is bound by the A308 ring road to the north. It is identified as an Opportunity Area in the Maidenhead Town Centre AAP (Policy OA2), specifically for a residential and office led mixed use regeneration scheme with complementary leisure, hotel and A3/A4 food and drink uses.

The site is separated from the Primary Shopping Area by the High Street’s northern frontages. Without better integration with and prominence from High Street and the Nicholsons Centre, the site is not commercially attractive for major retail development. Moreover, we consider that the mix of uses identified by Policy OA2 would be the most likely opportunity for this site.

#### *M3: York Road Opportunity Area*

This site is situated to the southeast of the town centre. It is identified as an Opportunity Area in the Maidenhead Town Centre AAP (Policy OA3), specifically for residential and office led mixed use development with some ground floor A3 uses. The site is not therefore allocated for A1 retail development.

In view of the site allocation, the nature of surrounding land uses, and its distance and connections to/from the Primary Shopping Area, we do not consider the York Road Opportunity Area suitable for major retail development.

We consider that a high quality residential and office led mixed use development, perhaps with small scale retail and/or leisure uses at ground floor, would be the most likely opportunity for this site.

*M4: Railway Station Opportunity Area*

This site comprises the area around Maidenhead railway station and is identified as an Opportunity Area in the Maidenhead Town Centre AAP (Policy OA4). In the light of the Crossrail investment, the site is identified by Policy OA4 for railway station improvements as part of an office led mixed use development also comprising 50 residential units, station-related retail uses, and a transport interchange.

We consider that there would be scope for small scale retail space associated with investment in and around the railway station. The demand for retail space in this location, in our view, is likely to be predominantly station driven; namely station-type retail uses such as ‘grab and go’ food and retail services.

Importantly, the scale and nature of retail space at the site should be controlled so as not to undermine the vitality and viability of the town’s Primary Shopping Area and/or detract from retail development and investment opportunities therein.

*M5: High Street East / York Stream Opportunity Area*

This site is situated at the eastern end of High Street, as identified in the Maidenhead Town Centre AAP. Policy OA5 of the AAP allocates the site as an Opportunity Area for residential and office led mixed use development with ground floor food and drink uses.

Part of the site – namely ‘Land West of Crown Lane’ – currently benefits from outline planning permission (application ref. 12/02762/OUT) for residential-led mixed use development including small scale retail and leisure uses. In terms of potential additional development opportunities in this location, we consider that a scheme similar to Land West of Crown Lane, with small scale retail and leisure uses at ground floor, would be suitable and most likely.

*M6: Stafferton Way Opportunity Area*

This site is situated off Stafferton Way, to the south of the town centre and beyond the railway line. It is identified as an Opportunity Area in the Maidenhead Town Centre AAP (Policy OA6), specifically for employment development. In view of this allocation, and the fact that the site occupies an out-of-centre location, we do not consider it suitable for retail development.

**Ascot District Centre**

*A1: Ascot Green*

This site is identified in the Ascot, Sunninghill and Sunningdale Neighbourhood Plan 2011-2026 as a potential strategic site and part of “the vision for how Ascot [District] Centre can be rejuvenated” over the plan period. In particular, the Neighbourhood Plan supports the delivery of a community centre with associated public open space, additional retail uses, and residential development.

Ascot Green is situated to the south of High Street and within the Green Belt. This is clearly a significant constraint to the development potential of the site, including retail development. For this reason, and for reasons of (lack of) retailer demand and commercial viability, we consider that the site is very unlikely to come forward for retail development over the plan period.

Further, we forecast little or no expenditure-based capacity for additional retail floorspace in the district centre to 2031 (as considered in section 5). We consider that any identified retail capacity would be 'soaked up' through changes of use, the reoccupation of vacant shop units, and/or further improvements in retailers' floorspace productivity and efficiency.

The most likely 'alternative' use for the Ascot Green site, in our view, would be community-based facilities and associated public open space.

### ***Sunningdale District Centre***

No retail development opportunities have been identified in Sunningdale District Centre. That said, we have forecast little or no expenditure-based capacity to support additional retail floorspace in the district centre to 2031 (as considered in section 5). Similar to Ascot District Centre; we consider that any identified retail capacity for Sunningdale District Centre would be 'soaked up' through changes of use, the reoccupation of vacant shop units, and/or further improvements in retailers' floorspace productivity and efficiency.

## 7. Conclusions

This Study has considered the qualitative and quantitative needs for retail development in the Borough of the plan period to 2031. We summarise the principal conclusions below.

- The UK's retail landscape has been and is changing at pace, and will continue to be the key driver of town centre activity and vital in creating the environment for other main town centre uses (and residential uses) to be successful. To ensure town centre health and prosperity over the plan period it will be important to respond to and plan for emerging trends in retailing (as considered in section 2 of this Study). The provision of larger and more flexible retail floorspace, and non-retail attractions such as A3 food and drink uses to help create a better all-round experience, will be important in this respect. Improvements to town centre environmental quality will also be necessary.
- Windsor Town Centre is the Borough's largest and most attractive town centre. It is a vital and viable town centre (underlined by its recent rise in the UK retail rankings) with an established 'twin' role – serving local, day-to-day shopping and service needs in addition to the needs of tourists/visitors. The importance of providing for local-based needs should not be understated, however.
- Maidenhead Town Centre has recently declined in the UK retail rankings which, together with other qualitative considerations including vacancy rates, indicates a strong need for investment and improvement to ensure the town centre's vitality and viability over the plan period. The arrival of Crossrail to the town centre in 2019 will be key in this respect, potentially acting as a catalyst for town centre development and improvement.
- Ascot is a vital and viable district centre within the limitations of its small scale and localised nature. It is very well occupied and serves the day-to-day needs of local residents. The district centre generally has a good quality environment; although traffic congestion is a problem.
- Sunningdale, like Ascot, is a vital and viable district centre within the limitations of its small scale and localised nature. The presence of Waitrose serves as a strong anchor and helps to sustain smaller shops and services. The district centre's pleasant 'village' environment is undermined by traffic congestion.
- A new household interview survey of shopping patterns has been undertaken for the purpose of this Study, specifically to inform our new and up-to-date retail capacity forecasts. The results of the 2015 survey indicate that Windsor, as expected, has the strongest fashion-orientated retail offer of the Borough's centres; securing almost three-times the market shares of such (clothing and footwear) expenditure compared with Maidenhead. This underlines the need for investment and improvement in Maidenhead Town Centre in particular. That said, Maidenhead secures relatively higher market shares of expenditure on the majority of other comparison goods categories.
- Reflecting the localised, convenience-based nature of the retail offer in the Borough's district centres, both secure their highest market shares of expenditure on medical goods/ beauty products. As expected, given their scale and nature, the market shares secured by Ascot and Sunningdale are very limited in regards to other comparison goods categories.

- Our quantitative, expenditure-based assessment of potential forecast capacity for convenience and comparison goods in the Borough’s centres indicates that there is scope for new retail development (additional to existing commitment developments) as follows:

- **Convenience Goods**

- *Summary of Retail Capacity Forecasts: Convenience Goods - sq m net sales area (Source: RBWM RECAP Model 2015)*

Location	2016	2021	2026	2031	RECAP Model Table
Windsor Town Centre	-50	150	350	550	13
Maidenhead Town Centre	-650	-200	200	600	21
Ascot District Centre	50	100	150	200	29
Sunningdale District Centre	0	100	150	250	37
Non-central stores in Borough	150	350	500	700	46
<b>Combined Forecasts in Borough</b>	<b>-500</b>	<b>500</b>	<b>1,350</b>	<b>2,300</b>	n/a

- **Comparison Goods**

- *Summary of Retail Capacity Forecasts: Comparison Goods - sq m net sales area (Source: RBWM RECAP Model 2015)*

Location	2016	2021	2026	2031	RECAP Model Table
Windsor Town Centre	500	2,400	4,100	5,350	13
Maidenhead Town Centre	100	1,250	2,300	3,050	21
Ascot District Centre	50	150	200	250	29
Sunningdale District Centre	50	150	200	250	37
Non-central stores in Borough	50	350	650	850	46
<b>Combined Forecasts in Borough</b>	<b>700</b>	<b>4,150</b>	<b>7,150</b>	<b>9,450</b>	n/a

- In accordance with the ‘town centres first’ approach of the NPPF, any forecast capacity at Non-central stores in Borough should be direct to and accommodated in or on the edge of the Borough’s town centres, wherever possible.
- Whilst the town centres include few potential opportunities for new retail development, those that exist (as considered in section 6 of this Study) could accommodate some of the forecast capacity – subject to retailer demand – and therefore should be actively promoted by RBWM and its partners to help ensure town centre vitality and viability.
- Unsurprisingly, given their limited scale and attractiveness as shopping destinations, there will be very limited capacity for additional retail floorspace in Ascot and Sunningdale over the plan period. Any forecast capacity in the district centres is likely to be met through changes of use, the

reoccupation of vacant shop units, and/or further improvements in retailers' floorspace productivity and efficiency.

- It will also be necessary to plan for small scale, incremental new retail floorspace in the Borough's town centres in accordance with the sequential approach. Whilst likely to make only a limited contribution towards accommodating forecast retail capacity, such provision (potentially as part of mixed use schemes) is in preference to the growth of retailing in out-of-centre locations. It will also help to improve town centre vitality and viability.