

Royal Borough of Windsor and Maidenhead

Retail Health Check



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Summary

This annual report addresses the requirement for 'comprehensive, relevant and up-to-date monitoring' of the regional centres of Windsor and Maidenhead, and the district centres of Ascot and Sunningdale, as set out in Planning Policy Statement 6 (PPS6): Planning for Town Centres¹. Also 'The South East Plan – Regional Spatial Strategy for the South East (2009)' states that Local Planning Authorities should carry out regular assessments of town centres (Policy TM1).

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

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

Windsor town centre is the first to be assessed in this report. This is an attractive shopping centre, offering a range of high-street, designer and specialist shops, and is popular with visitors. Indeed the South East Plan has identified Windsor as a 'priority area for tourism' under policy TSR7. The town centre exhibits good levels of vitality and viability with low yields, strong rents, a diverse selection of retailer representations, and a high level of environmental quality.

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

Recent developments in Windsor include the recently finished Waitrose development within the King Edward Court shopping centre and the closure of the Caley's department store, (currently being converted into a new hotel and retail units).

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

Recent developments in Maidenhead include the development at King Street/ Grenfell Island (an Odeon Cinema, restaurants and bars, and David Lloyd Leisure) and the Sainsbury's redevelopment. These have all contributed to improving the retail health of the town. However, Maidenhead town centre is still identified as an area in need of revitalisation, with the aim of making a good town even better.

Planning briefs for particular sites or areas in the town centre will be prepared in accordance with the document 'A Vision for Maidenhead Town Centre' (January 2009)².

¹ The government has published a draft PPS4: Planning for Prosperous Economies. This brings together key planning policies relating to the economy, and it is intended that it will replace PPG4 and PPS6 when adopted in late 2009. Policy EC11 requires that local planning authorities keep under review the vitality and viability of their town centres. This involves monitoring the health of town centres over time by collecting data on listed key indicators.

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

Introduction

This has been drawn up with key partner organisations to establish an overarching strategy for the town centre and to provide the basis for the coordinated development of the town over the next 20 years. The document highlights five priority projects which will be the key to regeneration and revitalisation of the town centre over the medium to longer term. These will form part of the Masterplan for the town centre, to be carried forward as part of the Area Action Plan³.

This report should be viewed in the context of the impact of surrounding retail areas and new developments occurring in these centres. It is interesting to note that a recent Slough Retail Assessment indicates that Slough only captures 30.1% of available spend in its area, with Windsor capturing 20.8% and Maidenhead 3.4%⁴. Planned retail developments are expected to impact on Windsor and Maidenhead, for example the proposed Bracknell Eye could result in a 7% loss of trade from Windsor and a 3% loss from Maidenhead owing to proximity⁵.

Further, the 'Heart of Slough' proposal to regenerate 11.75ha of land in the town centre⁶ (work due to commence in 2009) and the recent opening of High Wycombe's 'Eden Shopping Centre', are both likely to have an impact on the retail health of the town centres of Windsor and Maidenhead.

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

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

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

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

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

NB: This report should be read in light of the current economic downturn.

³ http://www.rbwm.gov.uk/web/pp_ids.htm

⁴ http://www.slough.gov.uk/documents/Slough_Retail_Assessment.pdf

⁵ <http://www.bracknell-forest.gov.uk/bracknell-town-centre-retail-study-impact-analysis.pdf>

⁶ <http://www.englishpartnerships.co.uk/slough.htm>

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Glossary

A1 (Shops)	Shops, retail warehouses, hairdressers, dry cleaners, sandwich bars, etc.
A2 (Financial and Professional Services)	Banks, building societies, estate and employment agencies, betting offices.
A3 (Restaurants and Cafés)	Restaurants, snack bars, cafés.
A4 (Drinking Establishments)	Pubs and bars.
A5 (Hot food Takeaway)	Takeaways.
Accessibility	Ease and convenience of access by a choice of means of travel, including – the quality, quantity and type of car parking; the frequency and quality of public transport services and the range of customer origins served; and, the quality of provision for pedestrians, cyclists and disabled people and the ease of access from main arrival points to the main attractions.
Catchment Area	The surrounding area that a shop or retail centre serves.
Commercial Yield	Demonstrates the confidence of investors in the long-term profitability of the centre for retail, office and other commercial developments, based on the capital value of the property in relation to the rental return. This indicator should be used with care.
Comparison Goods	Comparison goods relate to items not obtained frequently e.g. clothing, household items, electrical equipment, etc.
Convenience Goods	Convenience goods relate to essential everyday items e.g. food, drinks, newspapers, etc.
Designated Public Places Order (Alcohol Consumption) 2009	The Royal Borough has recently reviewed its 'Designated Public Places Order (Alcohol Consumption) 2009' to combat anti-social behaviour associated with alcohol. There are 111 areas in the Borough where there are now restrictions on public drinking. Refusal to cooperate can lead to fines of up to £500.
District Centre	Groups of shops often containing at least one supermarket or superstore, and a range of non-retail services e.g. banks, restaurants, public library etc.
Diversity of Use	The number of units used for different functions e.g. shopping, services, restaurants etc.
Environmental Quality	A set of properties and characteristics that relate to the natural and built environment. Should include views and information on problems (such as air pollution, noise, clutter, litter and graffiti) and positive factors (such as trees, landscaping and open spaces).

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Footfall	A key indicator of vitality of shopping streets, measured by the numbers and movement of people on the streets, in different parts of the centre at different times of the day and evening, who are available for business to attract into shops, restaurants or other facilities.
Local Development Framework (LDF)	Consists of a number of documents which together form the spatial strategy for development and land use.
Local Plan	A Borough-wide planning document setting out policies for development and the use of land. It will be replaced by the Local Development Framework.
National Multiple	A retail or service operator which is part of a network of nine or more outlets.
Planning Policy Statement (PPS)	A series of statements issued by the Government, setting out the policy guidance on different aspects of planning.
Primary Shopping Area	An area where retail development is concentrated as defined on the Local Plan proposals maps.
PRoM	Partnership for the Rejuvenation of Maidenhead. PRoM is a cross-party group created by the council with an independent chairman charged with finding agreed solutions for town centre regeneration, including the creation of a vision and Masterplan and a strategy for achieving it. It will make recommendations to the Royal Borough's cabinet. With a majority of lay members, PRoM represents a wide cross-section of interests in the town. Also contributing are council officers with relevant expertise, such as transport and planning.
Retailer Representation (and intentions to change)	Existence and changes in representation of types of retailer and the demand of retailers wanting to come into the centre.
Tourists	People who travel to and stay in places outside their usual environment, normally for the purposes of recreational or leisure.
Town Centre	The area including the primary shopping area and other areas of predominantly business/ leisure uses within or adjacent to the primary shopping area which provide a broad range of facilities and services and which fulfil a function as a focus for both the community and public transport. It excludes retail parks, neighbourhood centres and small parades of shops of purely local significance.
Services	In this report services comprise of non-retail outlets e.g. banks, hairdressing and beauty salons, cafés, restaurants, pubs.
South East Plan	A plan produced by the South East England Regional Assembly, which forms the Regional Spatial Strategy for the area.
Vacant Outlets	For this report vacant is defined as a unit that is currently empty and available for immediate let.

Introduction

Viability	Measure of economic health and consequently the ability of a town centre to attract investment and to maintain its form. Indicators that measure viability include vacancy rates, retail outlet representations and intentions to change representation.
Vitality	Degree to which the town is busy, lively, visited and represented by a variety of activities. Indicators that measure the vitality include the diversity of town centre uses, the perception of safety and the state of environmental quality.

Introduction

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1 Introduction

1.1 This is the 2008/9 annual review of retail health within the Royal Borough, based on the guidance in PPS6: Planning for Town Centres. It states 'comprehensive, relevant and up-to-date monitoring is essential to the effective planning and management of town centres'. The approved South East Plan – Regional Spatial Strategy for the South East (May 2009) defines both Windsor and Maidenhead as secondary regional centres⁷. Maidenhead is also identified as a second tier Sub-regional hub⁸. The closest primary centres to the Borough are Reading, High Wycombe, Slough and Woking. The nearest secondary centres to the Borough are Camberley, Bracknell and Staines. The hierarchy of centres for the Royal Borough as stated in the Local Plan is as follows:

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

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

- Diversity of main town centre uses;
- Retail outlet representation and intentions to change representation;
- Shopping rents;
- Proportion of vacant street level property;
- Commercial yields;
- Pedestrian flows (footfall);
- Accessibility;
- Customer and residents views;
- Perception of safety and occurrence of crime⁹;
- State of town centre environmental quality.

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

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

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

⁷ Based on Policy TC1 of the South East Plan

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

⁹ The perceptions of crime can only really be measured through primary surveys. The Council at the present time only has access to crime figures for the beat codes that cover the retail centres. These produce quantitative data that are not necessarily representative of public perceptions.

2 Windsor Town Centre Health Check

2 Windsor Town Centre Health Check

Form and Function

2.1 Windsor serves both local needs and those of tourists. Indeed the South East Plan has identified Windsor as a 'priority area for tourism' under policy TSR7. Accordingly its role as a popular visitor destination results in a wider range of shopping floor space than would normally be expected for a town of its size. The main retail centre of Windsor comprises:

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

2.2 A map of this area is available in the Proposals Map 3 of the RBWM Adopted Local Plan Incorporating Alterations adopted June 2003.

2.3 The main shopping area of Windsor is 'T' shaped extending down Peascod Street and St Leonards Road, and spreading northwards along Thames Street and southwards along the High Street, connecting with the Royal Windsor Shopping (in the refurbished Victorian railway station).

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

Diversity of Use

2.5 Biannual retail surveys are carried out in Windsor recording shop use frontage, vacancy rates and changes in Use Class. Accordingly some shops with more than one entrance are counted twice to ensure diversity of use classes on each street is maintained. The most recent retail survey for Windsor was carried out in February 2009 (see Table 1).

Table 1: Use Class Breakdown in Windsor Town Centre

Use Class	2006	2007	2008	2009
A1	265	260	255	252
A2	28	28	27	27
A3	60	62	63	65
A4	14	14	14	14
A5	5	5	4	4
Other	11	8	9	10
Total	383	377	372	372

(Source: RBWM Retail Surveys)

2.6 Use classes in Windsor Retail Centre by street are available upon request from the Planning Policy Unit or can be viewed on the RBWM website:

Windsor Town Centre Health Check

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

2.7 There is a mixture of both national multiple and independent retailers in Windsor. The presence of the former is believed to enhance the appeal of town centres often increasing footfall. Whilst independent retailers may benefit from this increase in potential customers, multiple nationals present competition. Accordingly independent traders in Windsor are predominantly to be found in secondary shopping areas, like St Leonards Road and towards the southern end of Peascod Street. Composition is determined by whether a shop sells items bought on an irregular basis (comparison), essential everyday items (convenience), provides a service or is miscellaneous (see Table 2 and Figure 1). The opening of Windsor Royal Shopping area (located in the refurbished Victorian railway station) in 1997 has contributed to the ability of Windsor to offer an up-market shopping experience that sets it apart from other retail centres.

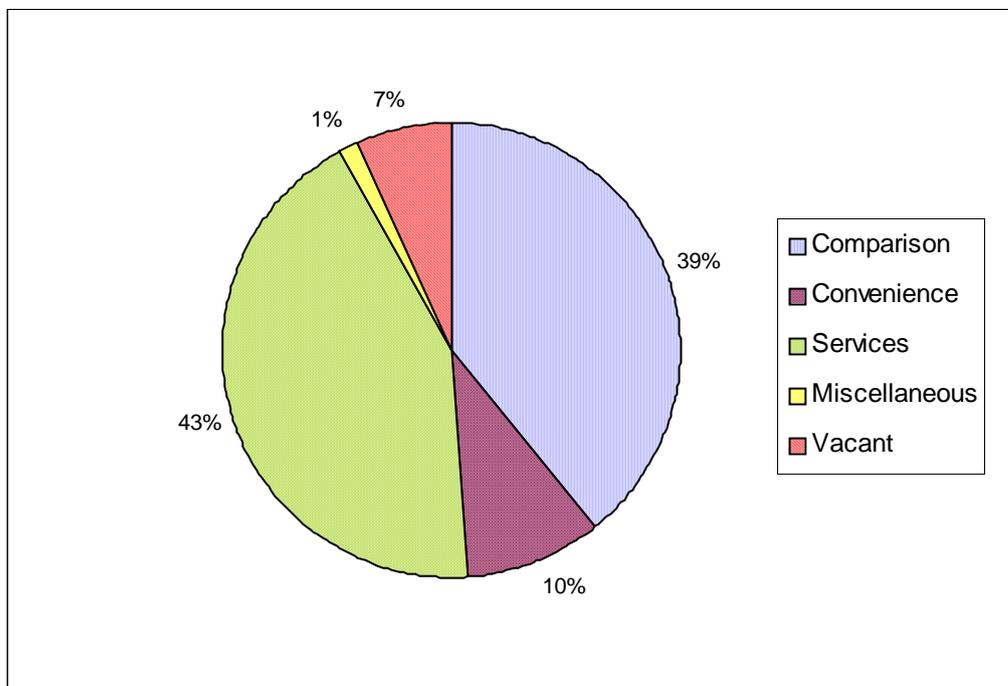
2.8 Service outlets account for greater than 40% of the retail units in Windsor town centre.

Table 2: Composition of Uses in Windsor Town Centre at February 2009

Type of Use	Number of Units Surveyed	Percentage of Overall Units
Comparison	144	39%
Convenience	36	10%
Services	158	43%
Miscellaneous	5	1%
Vacant	25	7%
Total:	368	100%

(Source: RBWM Retail Surveys)

Figure 1: Composition of Uses in Windsor Town Centre February 2009



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

2 Windsor Town Centre Health Check

Retailer Representations and Intentions to Change

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

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

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

2.12 John Lewis withdrew from Windsor in June 2006, however planning permission¹⁰ has been granted for the creation of three new retail units with a hotel above. This work is currently under-construction.

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

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

Year	Number	Source of Data
Jul 09	73	EGi ¹¹
Apr 05	88	FOCUS
Oct 04	77	FOCUS
Apr 04	75	FOCUS
Oct 03	85	FOCUS
Apr 03	83	FOCUS
Oct 02	94	FOCUS
Apr 02	86	FOCUS
Oct 01	74	FOCUS
Apr 01	87	FOCUS
Oct 00	86	FOCUS
Apr 00	72	FOCUS
Oct 99	61	FOCUS
Apr 99	59	FOCUS
Oct 98	57	FOCUS
Apr 98	64	FOCUS
Oct 97	58	FOCUS
Apr 97	46	FOCUS

2.14 Using published EGi¹² data it is possible to gain an indication of retailer requirements for any given town centre. Whilst this information has inherent accuracy issues e.g. retailers put out a requirement for a unit in any town in the South East rather

¹⁰ Planning application reference: 07/01660

¹¹ Requirements are calculated by adding together those for live (i.e. not satisfied) requirements 'In Town' and 'Shopping Centre' locations for the town. Non-specific nationwide entries are also excluded.

¹² EGi is the online property information service of the Estates Gazette Group.

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than a requirement for a specific town, useful trends can be drawn. A change in the source of data used means that direct comparison with previous years cannot be assured, but a downward trend would seem to reflect the current market (see Table 3).

Shopping Rents

2.15 The latest Colliers CRE 'In Town Retail Rents' research paper provides rates from 2000 to 2008 for the 609 open market Zone A shopping locations in the UK. Table 4 highlights the rental levels for Windsor over this period compared to neighbouring town centres.

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

Centre	2000	2001	2002	2003	2004	2005	2006	2007	2008
Reading	200	225	225	225	230	230	230	240	240
Windsor	125	130	130	130	130	135	160	165	165
Slough	110	100	95	100	100	105	105	105	105
Maidenhead	95	95	100	100	100	110	110	110	110
Bracknell	90	80	90	90	110	110	110	115	115
High Wycombe	75	80	85	85	85	90	90	90	130

(Source: Collier CRE 'In Town Retail Rents')

2.16 Rental levels for Windsor have risen since 2000, indicating a healthy centre that is increasingly in demand. Indeed according to a Colliers CRE 'In Town Retail Rents' (June 2008), Windsor rents are £165 p. sq. ft. Compared to neighbouring centres, Windsor is the second most expensive demonstrating it is a desirable location for retailer representation.

Vacancy Rates

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

Table 5: Vacancy Rates in Windsor Town Centre

Date of Survey	Vacancy Rate
Feb. 2001	8.5%
Nov. 2001	7.0%
Feb. 2002	8.3%
Nov. 2002	5.4%
Feb. 2003	4.7%
Nov. 2003	4.4%
Feb. 2004	5.7%
Nov. 2004	5.2%
Apr. 2005*	7.6%
Oct. 2005*	6.3%
Apr. 2006*	8.3%
Sep. 2006*	6.3%
Mar. 2007*	6.9%
Sep. 2007*	6.4%
Feb. 2008	4.3%
Sep. 2008	4.0%
Feb. 2009	6.7%

(Source RBWM Retail Surveys)

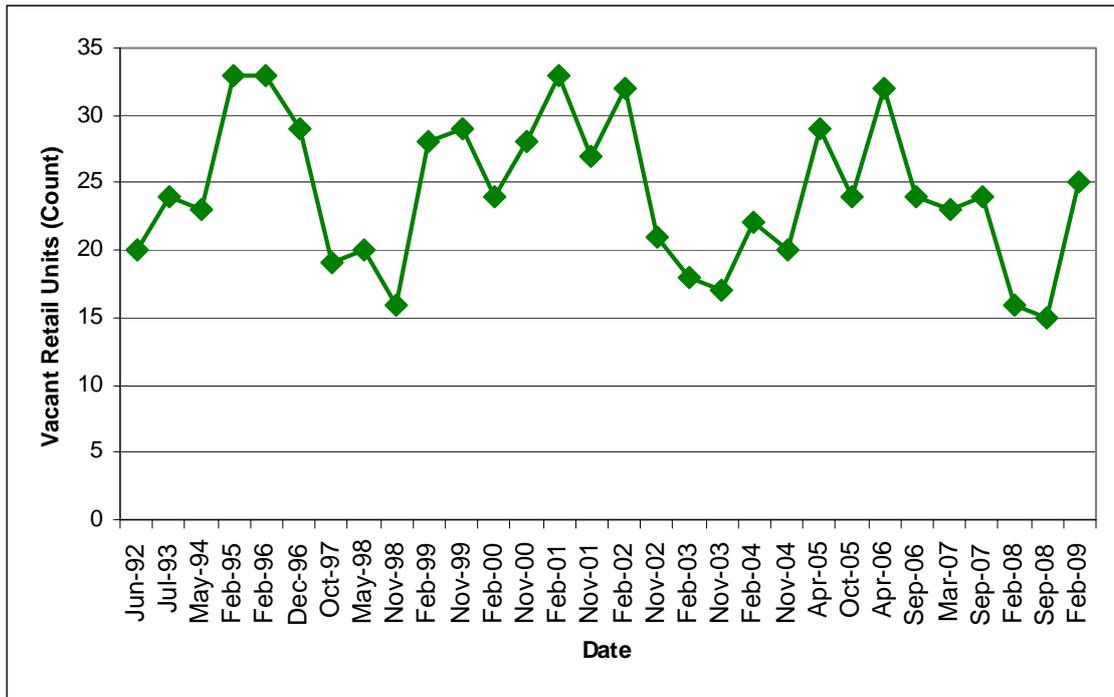
*Temporary increase in vacancy levels due to redevelopment of Waitrose and part of King Edward Court.

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2.18 In the most recent retail survey of Windsor (February 2009) there were 25 vacant properties (6.7%), an increase since the end of 2008.

2.19 Historically Windsor has had a relatively low vacancy rate compared to Maidenhead. Whilst the temporary closure of seven retail units in King Edward Court whilst redevelopment was taking place increased the vacancy figures, completion has rectified the situation (see Table 5/ Figure 2).

Figure 2: Historical Vacancy Rates in Windsor Town Centre



(Source: RBWM Retail Surveys)

Commercial Yields

2.20 Commercial yields can be an indicator of investor confidence and profitability of an investment, and can also reflect retail viability. However it is an indicator that needs to be used with care. The level of yield on its own is of less value than in comparison with other yields at different points in time and in different locations. Yields measured over time can offer an indication of the direction in which a particular town centre is moving (VOA, 2009).

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

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

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Table 6: Retail Property Yields

Date	Apr 01	Oct 01	Apr 02	Oct 02	Apr 03	Jan 04	Jul 04	Jan 05	Jul 05	Jan 06	Jul 06	Jan 07	Jul 07	Jan 08	Jul 08
Slough	6.75	7	8	8	7.25	6.5	6.5	6.5	5.5	4.5	4.5	4.5	4.5	4.5	4.75
Reading	6.5	6.5	6.5	6.5	6.5	6.5	6.5	6.5	5.5	4.5	4.5	4.5	4.25	4.5	4.75
Maidenhead	6.25	6.25	6.25	6.25	6.25	7	7	7.5	6.5	6	6	5.25	5.25	5.25	5.75
Windsor	5.75	6	6.75	6.75	6.25	6.25	6.25	5.5	4.75	4.25	4.25	4.25	4.25	4.25	4.5
Bracknell	7	7	7	7	7	7	7	7	6.5	6	6	6	6	6	6

(Source: The Valuation Office)

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

Footfall Counts

2.24 Most retail outlets are located along busy pedestrian routes, as it provides them with the most profitability, thus pedestrian footfall counts are an important retail health check. Pedestrian footfall data has been provided to RBWM by PMRS annually since 1996. The most recent data was collect on Friday 3rd and Saturday 4th October 2008.

2.25 Table 7 and Figure 3 show the average annual pedestrian counts for Windsor since 1996. Pedestrian counts have fluctuated more than in neighbouring Maidenhead. This can be accounted for by major developments and the changing fortunes of the tourist trade. For instance the re-development of Royal Windsor Station, the pedestrianisation of Peascod Street, redevelopment of King Edward Court and general slumps in the global tourism industry could explain periods of lower pedestrian numbers in Windsor¹³. (Please contact the Planning Policy Unit for the most recent footfall counts).

Table 7: Average Footfall in Windsor

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

(Source: PMRS Footfall Surveys)

2.26 Between 1996 and 1998 the highest footfall count was outside Marks and Spencer located towards the top of Peascod Street. In following years, the highest footfalls have been outside Boots in King Edward Court and outside Lloyds TSB on Thames Street. The footfall figures for 2008 follow the trend of the highest counts being consistently found along Peascod Street, in King Edward Court and around Thames Street. The focus of

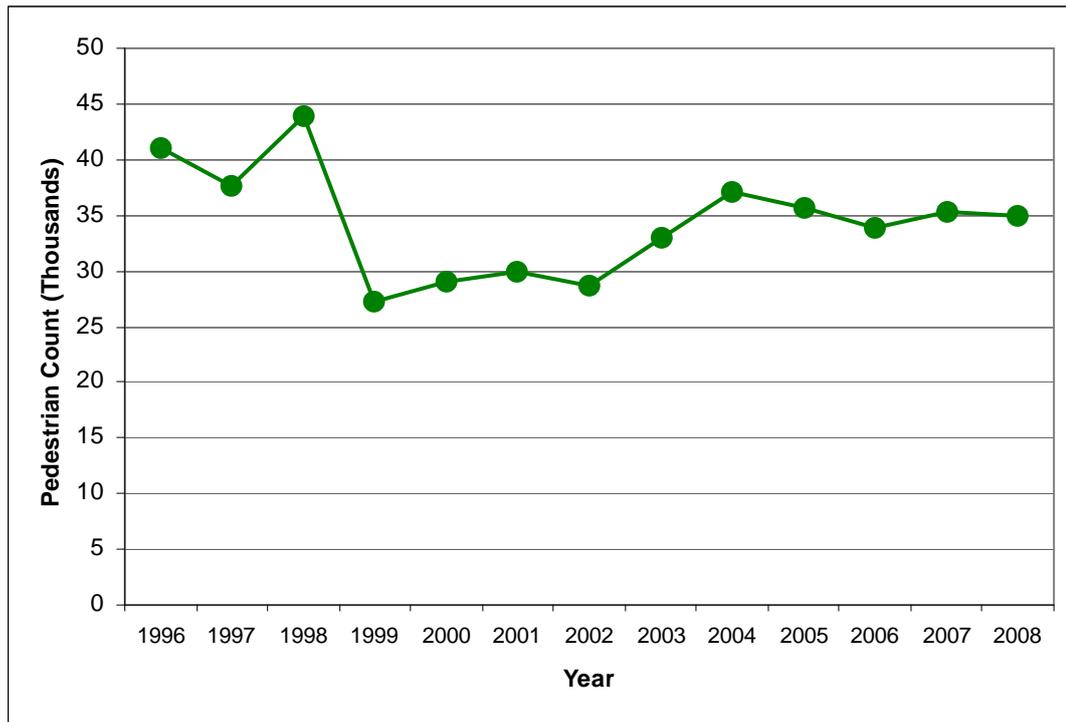
¹³ Between 1998 and 1999 there was a very sharp decline in footfall levels. Although there are no major factors that could explain this difference, the weather for the survey period was cold with heavy rain that could have deterred people from shopping.

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Windsor Castle at the very top of Peascod Street can explain high footfalls in this area. The opening of Windsor Royal Station in 1997 has led to a more varied circulation pattern of pedestrians.

2.27 The areas that receive the lowest footfall counts are often peripheral secondary shopping areas such as St Leonards Road and William Street with few national multiples; these are also places farthest from the Castle and associated tourist attractions. The pedestrian flows for 2008 are consistent with these findings from previous years.

Figure 3: Windsor Pedestrian Footfall Since 1996



Cyclist Counts

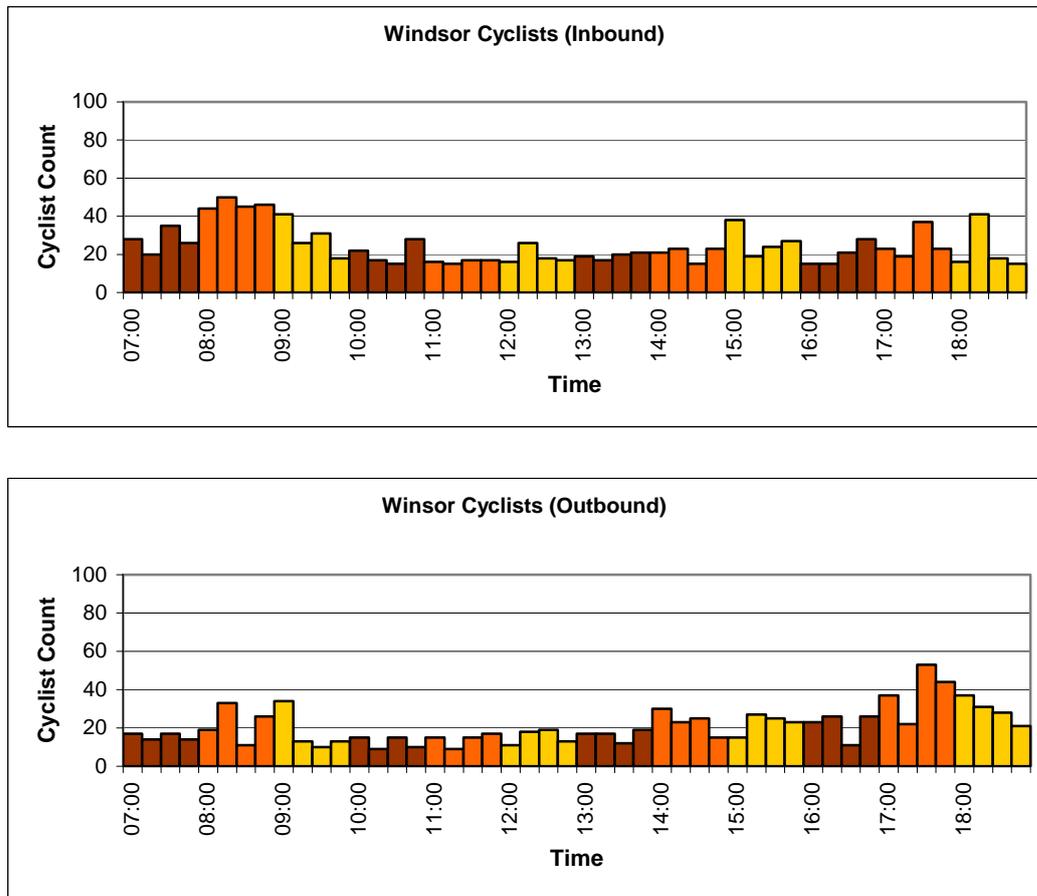
2.28 Cyclist counts were conducted weekdays from 7am–7pm in September 2008. They represent complete cordons around the town centre, each site being surveyed on a single day to minimise impacts of day-to-day variability. Weather conditions were selected to be as consistent as possible.

2.29 The peak flows follow commuter times, showing high counts in the mornings at 8 – 9am inbound and 5-6pm outbound (see the graphs in Figure 4). Interestingly an increased number of cyclists can be seen at around 3pm.

2.30 The cyclist counts provide a useful indication of how people access Windsor town centre. The highest count at any given time was 53, but a pedestrian count taken at the same time confirms that high numbers of people are in the town.

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Figure 4: Cyclist Counts in Windsor



(Source: RBWM Transport Surveys)

Accessibility

2.31 A large percentage of Windsor retail centre is pedestrianised, including Peascod Street, King Edward Court and Windsor Royal Station. The nature of the town presents some inherent problems common to many historical towns. The Castle is on a steep hill; consequently some of the shops, restaurants and hotels are less accessible to wheelchair users because of their historic nature¹⁴.

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

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

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

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

¹⁴ <http://www.windsor.gov.uk/site/visitor-information/travelling-with-a-disability>

2 Windsor Town Centre Health Check

2.35 Despite being extensively pedestrianised, both on and off road parking is available. The off-street parking serving the retail centre is available at various locations (see Table 8).

Table 8: Car Parking Available in Windsor (Prices at March 2009)

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

(Source: RBWM website) * Weekend parking only

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

Public Perceptions

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

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

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

Perception of Safety & Occurrence of Crime

2.39 This information covers a twelve-month period for each crime year, which starts in April and ends in March¹⁵.

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

2.41 The police beat for Windsor exceeds the boundaries of the retail centre but this is still a fairly apt representation of how people perceive safety within the centre during both day and night uses (see Table 9/ Figure 5).

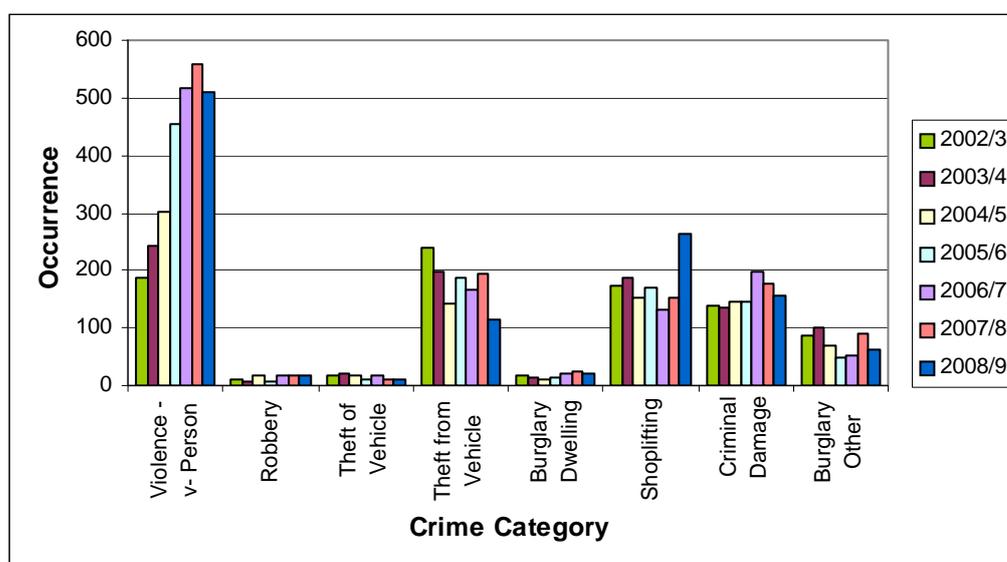
¹⁵ The statistics for Windsor and Maidenhead have been sourced from Thames Valley Enterprise Information System – this system gathers data for management information and performance indicators.

Windsor Town Centre Health Check

Table 9: Crime Statistics for Windsor

Crime Category	2002/3	2003/4	2004/5	2005/6	2006/7	2007/8	2008/9
Violence -v- Person	186	242	302	454	516	557	509
Robbery	12	7	19	8	19	16	19
Theft of Vehicle	17	22	17	11	19	12	9
Theft from Vehicle	241	199	142	187	165	194	114
Burglary Dwelling	19	13	9	13	20	26	22
Shoplifting	175	189	151	171	131	151	265
Criminal Damage	137	135	146	144	199	176	155
Burglary Other	87	99	70	49	51	91	64

Figure 5: Crime Statistics for Windsor



(Source: Thames Valley Police)

2.42 The majority of crime categories have shown a decrease since 2002 or remained relatively static with the exception of violence against the person and shoplifting. The former has risen from 186 in 2002/3 to a peak of 557 in 2007/8, but has subsequently shown a decrease in 2008/9, and the latter has increased by 114 incidents since 2007/8. Criminal damage, burglary (other), theft of/ from vehicles have all seen a decrease in occurrence in the last year. (For more information please contact Thames Valley Police)¹⁶.

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

Environmental Quality

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

2.45 The pedestrianised area of Peascod Street, coupled with good quality street furniture and level surfaces, enhances the retail experience of Windsor. There is also a

¹⁶ <http://www.thamesvalley.police.uk/>

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low level of graffiti and litter. It is therefore considered that all these factors contribute to making Windsor a highly attractive town centre.

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

2.47 Windsor and Eton together have been voted the top town in the UK in the 2008/09 national Clean Britain Awards. The five star gold award reflects the Royal Borough's concentrated efforts to keep local streets clean and tidy through determined campaigns such as zero tolerance on littering, decluttering of unnecessary signage, free Stubbi pouches for cigarette butts, abandoned shopping trolley retrieval and fast action against graffiti.

Conclusion

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

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

Maidenhead Town Centre Health Check

3 Maidenhead Town Centre Health Check

Form and Function

3.1 Maidenhead has a local catchment area and is classified as a secondary regional centre under policy TC1 in the South East Plan (2009). Maidenhead possesses a range of specialist and non-food shops. The main retail centre comprises of:

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

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

Diversity of Use

3.3 Biannual retail surveys are carried out in Maidenhead recording shop use frontage, vacancy rates and changes in Use Class. The most recent retail survey for Maidenhead was carried out in February 2009:

Table 10: Use Classes in Maidenhead Town Centre at 4th February 2009

Use Class	2006	2007	2008	2009
A1	206	202	205	206
A2	41	38	42	42
A3	34	31	32	33
A4	13	13	13	12
A5	10	12	14	16
Other	13	19	21	20
Total	317	315	327	329

(Source: RBWM Retail Surveys)

3.4 There was a reduction in two retail units along Queen Street following the re-development of part of No. 41 Queen Street and No. 74, which has been converted from being two units to one. The amalgamation of five retail units into three in the Nicholsons centre due to redevelopment, and the additional monitoring of Providence Place, St. Ives Road and Bridge Avenue can account for the new higher figure for retail units in Maidenhead for 2008 and 2009.

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

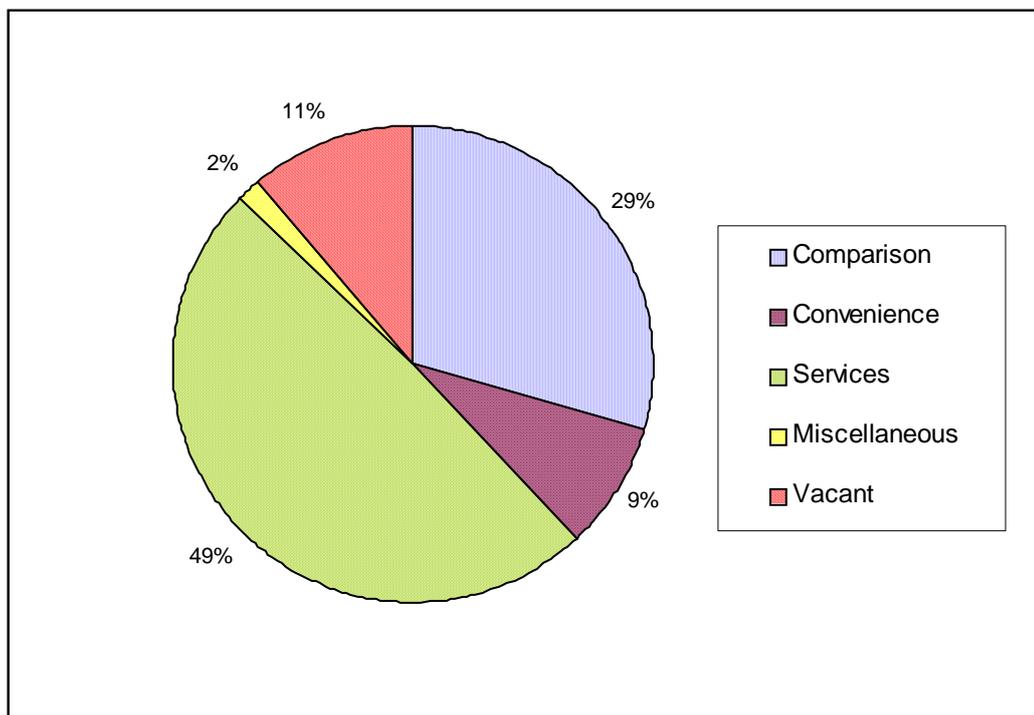
3.6 Service outlets account for almost half the composition of retail in Maidenhead, varying from cafes and restaurants to hairdressers, estate agents and banks.

Table 11: Composition of Uses in Maidenhead Town Centre, February 2009

Type of Use	Number of Units Surveyed	Percentage of Overall Units
Comparison	97	29%
Convenience	28	9%
Services	162	49%
Miscellaneous	5	2%
Vacant	37	11%
Total:	329	100%

(Source RBWM Retail Surveys)

Figure 6: Composition of Uses in Maidenhead Town Centre



(Source: RBWM Retail Surveys)

Retailer Representations and Intentions to Change

3.7 There are a good number of multiples represented within Maidenhead town centre including: Next, Top Shop, Boots, Tesco, Sainsbury's, Waitrose, Marks and Spencer's, W H Smith, Argos, and New Look. Peacocks has recently been opened in the Nicholsons Centre (Summer 2009). However there is public demand for a department store.

3.8 Using published EGi¹⁷ data it is possible to gain an indication of retailer requirements for any given town centre. Whilst this information has inherent accuracy issues e.g.

¹⁷ EGi is the online property information service of the Estates Gazette Group.

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retailers put out a requirement for a unit in any town in the South East rather than a requirement for a specific town, useful trends can be drawn.

3.9 A hinderance to these retailers acquiring their desired representation in Maidenhead has been a lack of suitable units at the sizes they require. The most recent development in the centre was the office and leisure development at Grenfell Island, which included the development of a new cinema complex, Ivory Lounge, Pizza Hut, Noodle Nation and a David Lloyd Health Club, but no larger units. ING Real Estate still has intentions to redevelop a substantial slice of Maidenhead town centre to create a mixed-use scheme linking the existing retail core with the town's railway station, providing substantial new retail space, parking and offices¹⁸.

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

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

Year	Number of Requirements	Source of Data
Jul 09	33	EGi ¹⁹
Apr 05	67	FOCUS
Oct 04	70	FOCUS
Apr 04	76	FOCUS
Oct 03	88	FOCUS
Apr 03	83	FOCUS
Oct 02	82	FOCUS
Apr 02	75	FOCUS
Oct 01	63	FOCUS
Apr 01	71	FOCUS
Oct 00	58	FOCUS
Apr 00	58	FOCUS
Oct 99	46	FOCUS
Apr 99	54	FOCUS
Oct 98	48	FOCUS
Apr 98	52	FOCUS
Oct 97	51	FOCUS
Apr 97	43	FOCUS

Shopping Rents

3.11 The latest Colliers CRE 'In Town Retail Rents' research paper provides retail rental rates from 2000 to 2008 for the 609 open market Zone A shopping locations in the UK (June 2008). Table 13 highlights the rental levels for Maidenhead over this period compared to neighbouring town centres.

¹⁸ Source: http://www.rbwm.gov.uk/web/news_40107_maidenhead_rejuvenation.htm and http://www.rbwm.gov.uk/web/pp_broadway_king_street_queen_street_triangle_spd.htm

¹⁹ Requirements are calculated by adding together those for live (i.e. not satisfied) requirements 'In Town' and 'Shopping Centre' locations for the town. Non-specific nationwide entries are also excluded.

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

Centre	2000	2001	2002	2003	2004	2005	2006	2007	2008
Reading	200	225	225	225	230	230	230	240	240
Windsor	125	130	130	130	130	135	160	165	165
Slough	110	100	95	100	100	105	105	105	105
Maidenhead	95	95	100	100	100	110	110	110	110
Bracknell	90	80	90	90	110	110	110	115	115
High Wycombe	75	80	85	85	85	90	90	90	130

(Source: Collier CRE 'In Town Retail Rents')

3.12 Retail rental levels offer a good indication of town centre health. Maidenhead is showing a consistent demand for floor space, currently static at approximately £110 p. sq. ft. This is a competitive rate compared to surrounding town centres, fairing higher than nearby Slough, and only £5 p. sq. ft below that of Bracknell. The increase rental prices in High Wycombe reflect the recent completion of the Eden Centre.

3.13 Interestingly the FOCUS Retail Demand Report 2007, states that in recent years the UK market has seen a resurgence of previously struggling retailers e.g. Marks and Spencer and Sainsbury's. The latter of whom has had a large redevelopment and increased floor space in Maidenhead.

Vacancy Rates

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

Table 14: Vacancy Rates, Maidenhead

Time of Survey	Vacancy Rate
Feb.2001	10.9%
Nov.2001	6.6%
Feb.2002	7.9%
Nov.2002	7.9%
Feb.2003	8.5%
Nov.2003	5.1%
Feb.2004	6.3%
Nov.2004	6.0%
Mar.2005	6.6%
Oct.2005*	8.5%
Apr.2006*	8.8%
Sep.2006**	11.4%
Feb.2007**	10.5%
Sep. 2007**	9.1%
Feb. 2008**	10.7%
Sep. 2008**	10.1%
Feb. 2009**	11.2%

(Source: RBWM Retail Surveys)

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

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

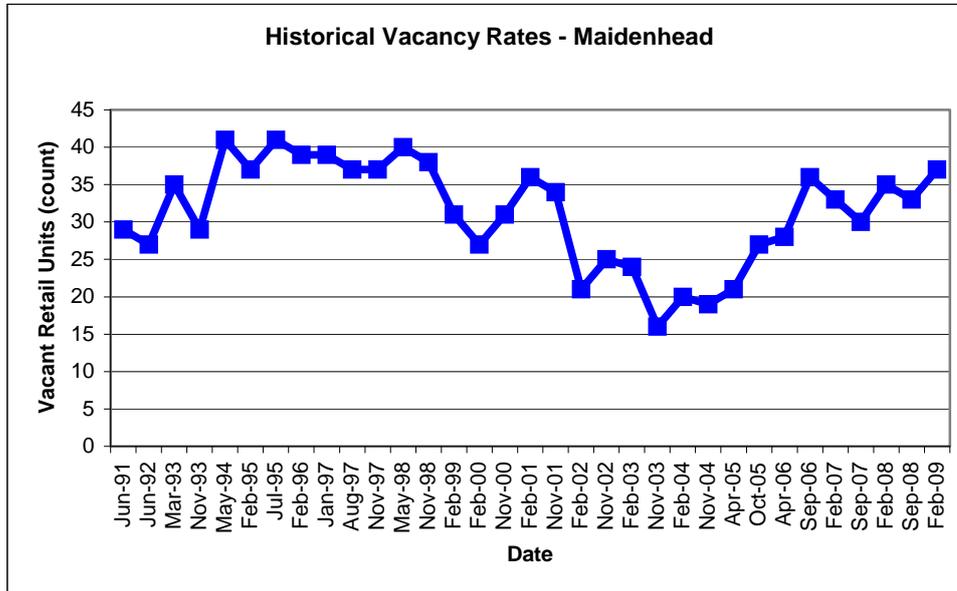
3.15 The most recent retail survey conducted by the Borough (February 2009) shows there are 37 vacant properties (11.2%).

3.16 Historical vacancy rates in Maidenhead town centre since 1991 can be seen in Figure 7. As before, this data has been taken from RBWM biannual retail surveys, and it is important to note that the total number of retail units has changed over time. Vacancy

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rates partly reflect national economic trends, but were generally declining (showing improvement) until the recent deterioration in retail conditions in Maidenhead over the last few years (in particular along Queen Street), but these issues are being addressed by PRoM and the project of a mixed use redevelopment scheme in this area.

Figure 7: Historical Vacancy Rates in Maidenhead



(Source: RBWM Retail Surveys)

Commercial Yields

3.17 Table 15 is taken from the July 2008 Property Market Report published by the Valuation Office, showing time series data on retail property yields for Maidenhead from Spring 2001 to Summer 2008. For detailed information regarding the value of Retail Property Yields see paragraph 2.20.

Table 15: Retail Property Yields

Date	Apr 01	Oct 01	Apr 02	Oct 02	Apr 03	Jan 04	Jul 04	Jan 05	Jul 05	Jan 06	Jul 06	Jan 07	Jul 07	Jan 08	Jul 08
Slough	6.75	7	8	8	7.25	6.5	6.5	6.5	5.5	4.5	4.5	4.5	4.5	4.5	4.75
Reading	6.5	6.5	6.5	6.5	6.5	6.5	6.5	6.5	5.5	4.5	4.5	4.5	4.25	4.5	4.75
Maidenhead	6.25	6.25	6.25	6.25	6.25	7	7	7.5	6.5	6	6	5.25	5.25	5.25	5.75
Windsor	5.75	6	6.75	6.75	6.25	6.25	6.25	5.5	4.75	4.25	4.25	4.25	4.25	4.25	4.5
Bracknell	7	7	7	7	7	7	7	7	6.5	6	6	6	6	6	6

(Source: The Valuation Office)

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

Footfall Counts

3.19 The annual footfall surveys for Maidenhead are undertaken by PMRS in October every year, the most recent survey being on Friday 3rd and Saturday 4th October 2008. The footfall is recorded at 30 sites. These records are available upon request from the Planning Policy Unit.

3.20 Table 16 and Figure 8 show that, on average, pedestrian flows have remained relatively consistent since 1996 with only minor fluctuations. The biggest fluctuation was

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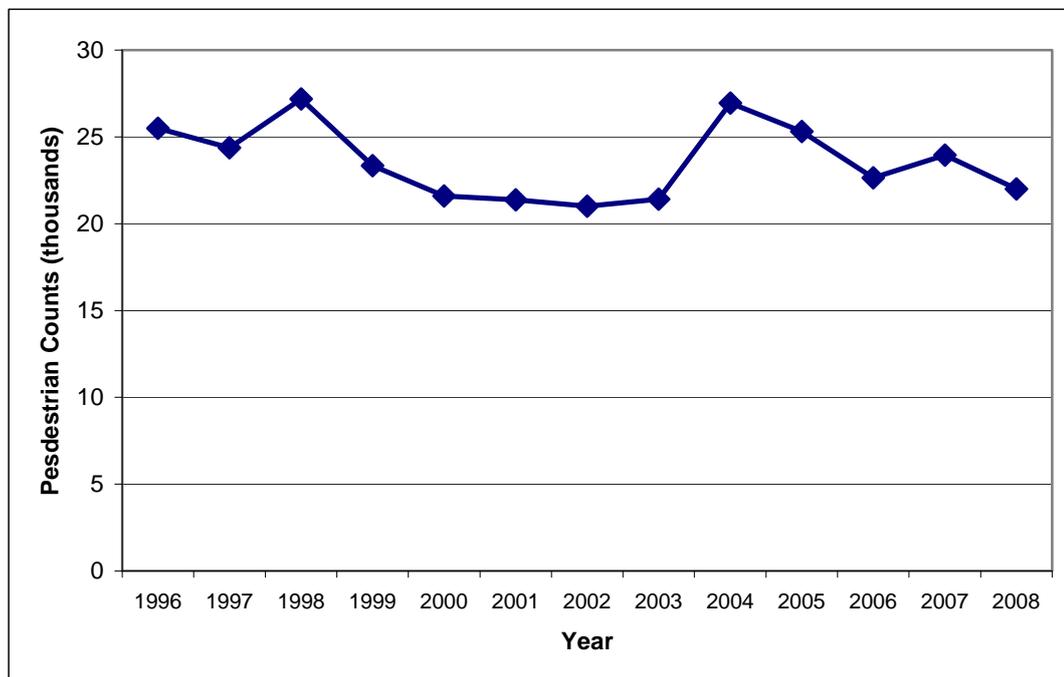
between 2003 and 2004 with an increase of 5,540. Footfall has decreased since the 2008 Retail Health Check Report.

Table 16: Average Footfall in Maidenhead

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

(Source: PMRS Footfall Survey)

Figure 8: Footfall Trend in Maidenhead



3.21 The collection and collation of this data has revealed changes in the behaviour of pedestrian movement. As would be expected in any town centre, some routes are favoured more than others. In July 1996 the highest pedestrian count was recorded outside Marks and Spencer in the High Street, and the lowest outside 66 King Street.

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This remained the case until 1999 when the lowest count was outside 3 Providence Place (near Sainsbury's).

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

3.23 The most recent pedestrian count taken in October 2008 shows that the highest pedestrian flow was recorded outside Marks and Spencer, the same as the previous four years, whereas the lowest pedestrian count is now found outside 4 Bridge Avenue. In recent years the lowest count has been recorded along St. Mary's Walk, but the completion of the Sainsbury's redevelopment appears to have increased footfall.

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

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

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

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

3.28 Figure 8 shows an overall decline in footfall in the centre from 2004/05 that is consistent with trends elsewhere (e.g. Windsor) so would tend to reflect changing market conditions rather than a declining centre.

Cyclist Counts

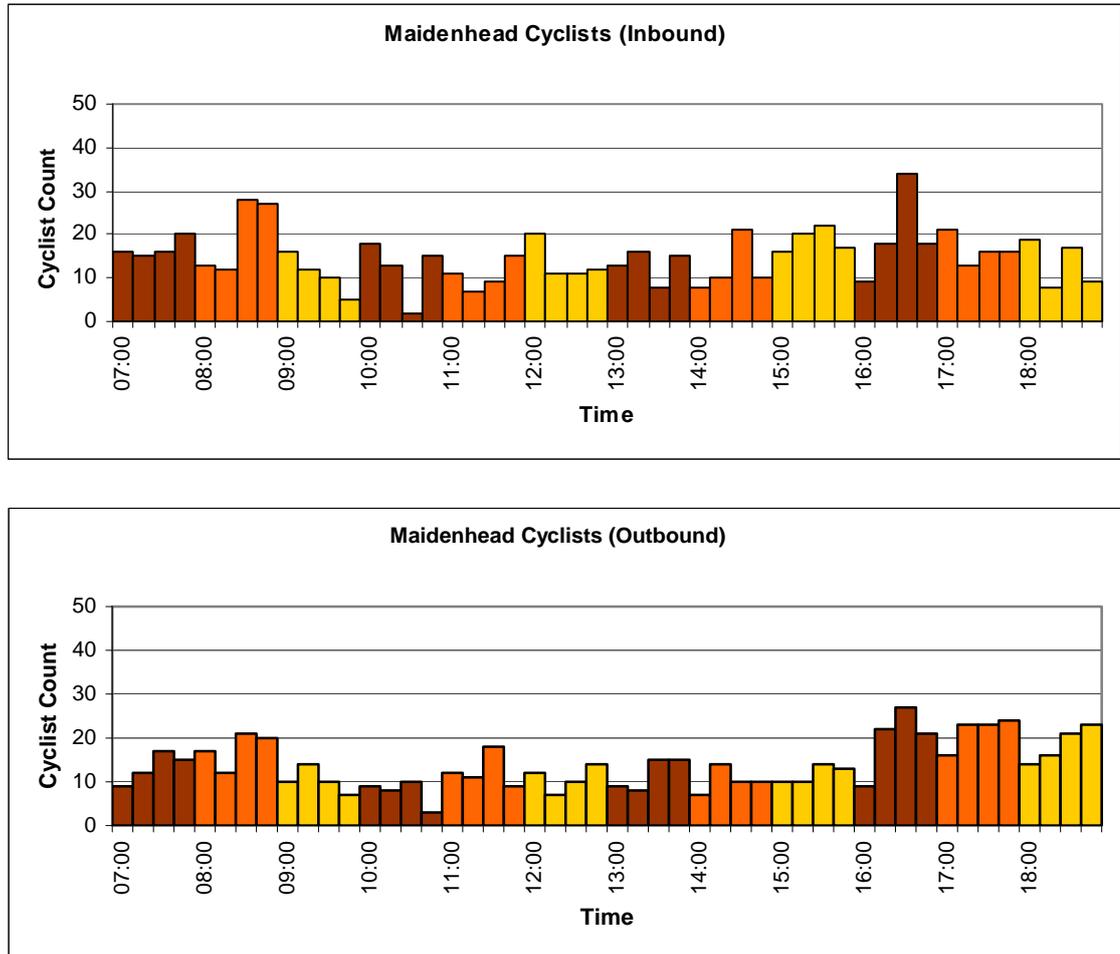
3.29 Cyclist counts were conducted weekdays from 7am – 7pm in September 2008. They represent complete cordons around the town centre, each site being surveyed on a single day to minimise impacts of day-to-day variability. Weather conditions were selected to be as consistent as possible.

3.30 Peak cycle flows (inbound and outbound) reflect commuter times (see the graphs in Figure 9). Actual numbers of cyclists are surprisingly low for a town of Maidenhead's size, indicating alternative transport is used.

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

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Figure 9: Cyclist Counts in Maidenhead, 2008



(Source: RBWM Transport Surveys)

Accessibility

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

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

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

3.35 There are a number of bus services supplying Maidenhead town centre, with stops in the centre e.g. at the corner of High Street/ Queen Street, and around the perimeter e.g. Frascati Way. Improvements have been made to the legibility of services to passengers by Real Time Bus Information boards. Services do not run into the evenings beyond 7pm but there are some on Sundays.

3.36 There are numerous long and short stay car parks in and around the town centre, which provide accessibility to car users (see Table 17). The long stay car parks tend to be

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on the periphery of the centre, whereas the short stay shopper's car parks are within the retail centre. This ensures there is high space turnover in convenient locations.

Table 17: Maidenhead Car Parking Prices (as at February 2009)

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

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

3.37 Maidenhead town centre offers a Shopmobility service from the Nicholsons Centre for those who have difficulty walking. The service operates Monday to Saturday 10am – 5pm and costs a small fee for the hire of equipment (manual or powered wheelchairs/scooters) or an escort to accompany shoppers in need of extra assistance. Shopmobility has been available in Maidenhead for 13 years.

Public Perceptions

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

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

3.39 A subsequent consultation was held for 'Maidenhead Town Centre – Towards 2026' during February 2007. The main issues raised during this consultation were:

- 60% of respondents were in favour of more shops in the identified areas of West Street, Broadway and the east end of the High Street.
- 77% supported a more mixed town centre, with a balance of office, retail and residential properties.
- 87% saw a need for stronger connections between the town centre and the River Thames.
- The majority of respondents support the need for more public spaces for landscaping and gardens (73%) and spaces for markets and fairs (71%).
- 88% agreed that the town centre should be accessible by all forms of transport.
- Popular buildings were identified; this included the Town Hall, the Clock Tower, Cressett Towers, Queen Anne House (on the Broadway) and St Mary's House. All of which were considered to be good reference points for future design in the town centre.

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- Respondents recognised a need to harmonise new buildings with the existing and diverse streetscapes, more recent buildings that have been considered to achieve this include the Library, the Hutchinson 3G UK LTD building and Grenfell Island.
- Taller buildings were largely considered eyesores not because of their height but because they were regarded as ugly.

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

3.41 The Council is currently preparing both a Core Strategy DPD as well as a Delivery & Development Principles DPD as part of the LDF. The results of the consultation (Spring 2009) are broadly consistent with those found in earlier consultations (see paragraphs 3.38 and 3.39). The results of the consultation will feed into the preparation of both the Core Strategy and the Delivery & Development Principles DPDs.

Perceptions of Safety & Occurrence of Crime

3.42 The statistics in Table 18 have been obtained from Thames Valley Police. The data has been reviewed over time rather than against other areas within the Royal Borough because all the centres are considered to have their own unique character. It is also important to note that these figures are the results of day and night uses of the town centre.

Table 18: Crime Statistics for Maidenhead

Crime Category	2002/3	2003/4	2004/5	2005/6	2006/7	2007/8	2008/9
Violence -v- Person	296	343	414	405	431	440	357
Robbery	10	13	13	19	13	15	11
Theft of Vehicle	15	10	14	9	5	5	5
Theft from Vehicle	72	68	67	96	52	38	22
Burglary Dwelling	11	15	12	5	9	4	3
Shoplifting	209	161	169	167	158	175	214
Criminal Damage	142	171	188	156	168	145	138
Burglary Other	52	57	63	54	49	41	34

(Source: Thames Valley Police)

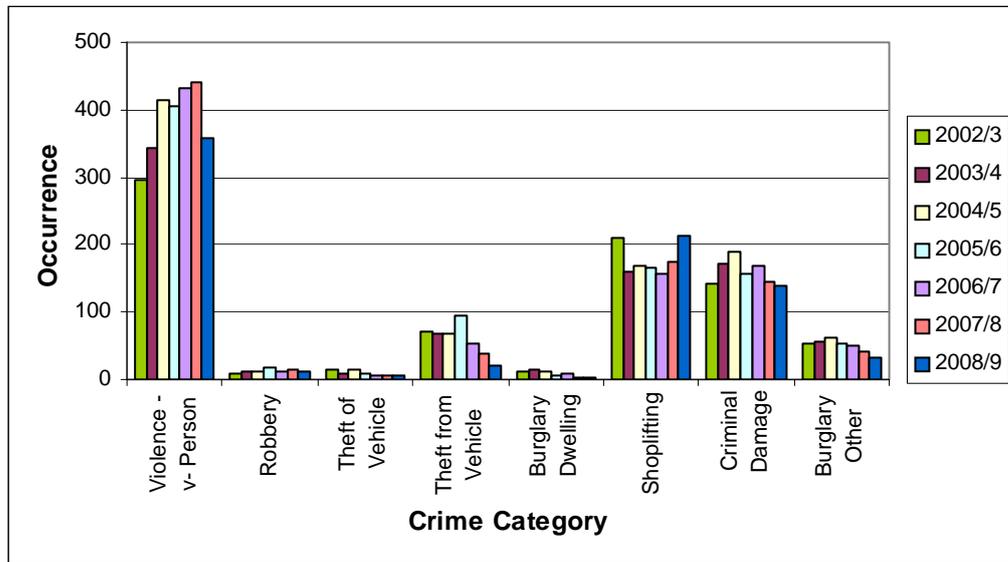
3.43 Maidenhead's most frequently occurring crime has been within the category of violence against the person, which is in line with the trend in Windsor. However this has seen a decline of almost 19% from the 2007/8 to 2008/9 periods. Incidences of criminal damage and shoplifting also remain relatively high, whilst theft from a vehicle has decreased in recent years.

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

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

Maidenhead Town Centre Health Check

Figure 10: Crime Statistics for Maidenhead



Environmental Quality

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

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

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

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

3.50 The former cinema site on the corner of the High Street and the Green Way was demolished in October 2008 and gained planning permission in February 2009 for redevelopment to a four-storey office and café. Improvements are also needed along the Green Way, although there has been some recent renovation.

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

3.52 The densely built urban centre does not favour public squares or parks that frequently constitute open space. However the Maidenhead Town Centre Conservation Area Statement perceives that the pedestrianisation of much of the High Street provides a traffic free environment that serves as a valuable addition to open space in the town. Grenfell Park and Kidwells Park are located adjacent to the centre but it is difficult to reach them due to the 'ring road' dual carriageway. This means the parks are only accessible via subways or major crossings, which are never desirable pedestrian routes.

3 Maidenhead Town Centre Health Check

The parks are considered ancillary to the town centre not integral. Indeed in two recent consultations, many people have commented on the need for a town square to provide a central fixture with the open space. However the recently completed redevelopment of Sainsbury's at Providence Place has created a piazza that accounts for additional open space in the town.

Looking to the Future

3.53 The Maidenhead Waterways Restoration Group (MWRG) was established in 2006 with the aim of restoring the original waterways through the town centre to a navigable standard, bringing boats and water related amenities back into the centre of Maidenhead and stimulating much needed regeneration in that part of the town. This is a voluntary organisation working in partnership with the Council, Environment Agency and other national and local groups²⁰. As part of its local planning strategy, the council has produced a planning brief – the "Maidenhead Waterways Framework", to guide future planning decisions along the waterway corridor²¹.

3.54 The council has identified Maidenhead as an area to be revitalised with the aim of making a good town even better. This is being undertaken by the Partnership for the Regeneration of Maidenhead (PRoM), a cross-party group created by the council with an independent chairman charged with steering the regeneration²². PRoM is pursuing actions on three fronts:

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

3.55 Cabinet has now adopted the 'Vision' for Maidenhead Town Centre as a strategy; accordingly work has now started on developing a Masterplan for the area. It is intended that this Masterplan will be transformed into an Area Action Plan (AAP) for the formal Local Development Framework process. There will be further studies conducted to support this work, including a 'Public Realm Strategy' and 'Transport Modelling'²³. Further consultation on the AAP will be carried out during the summer 2009.

Conclusion

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

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

3.58 There are plenty of car parking facilities available making the town accessible to those who have a motor vehicle, however for those who do not public transport needs to

²⁰ www.maidenheadwaterways.org/

²¹ http://www.rbwm.gov.uk/web/pp_maidenhead_waterways_framework.htm

²² <http://www.rbwm.gov.uk/web/prom.htm>

²³ The timeframe for the production of the AAP is set out in the Council's Local Development Scheme http://www.rbwm.gov.uk/web/pp_lds.htm

Maidenhead Town Centre Health Check

be improved. In particular the bus service which needs an increase in the services available. Yet despite these shortfalls, the footfall counts show that Maidenhead has a relatively consistent visitor attraction.

3.59 Many parts of the town centre would benefit greatly from environmental improvements, in particular the peripheral outer secondary shopping areas such as Queen Street. However the AAP will make it a reality.

Health Check of Ascot and Sunningdale District Centres

4 Health Check of Ascot and Sunningdale District Centres

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

Form and Function

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

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

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

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

Diversity of Uses

4.6 Ascot – Biannual retail surveys are conducted in Ascot to record the usage of each retail unit. Maintaining accurate information is essential to ensure the composition of uses within Ascot retail centre remains as diverse as possible. Table 19 and Figure 11 show the composition of uses for this core area at February 2009.

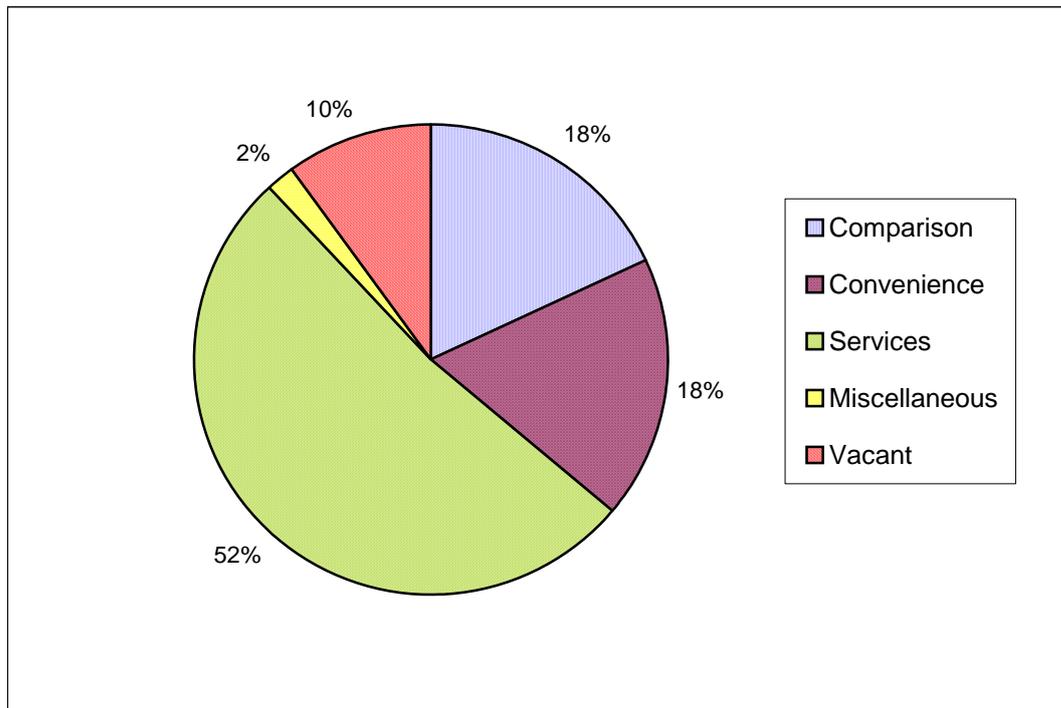
Table 19: Composition of Uses in Ascot

Type of Use	Number of Units Surveyed	Percentage of Overall Units
Comparison	9	18%
Convenience	9	18%
Services	26	52%
Miscellaneous	1	2%
Vacant	5	10%
Total	50	100%

(Source: RBWM Retail Survey, February 2008)

Health Check of Ascot and Sunningdale District Centres

Figure 11: Composition of Ascot District Centre



4.7 As illustrated in Figure 11, 'services' account for over half the retail unit usage in Ascot, varying from cafés and estate agents to hairdressers. Whilst this number may seem high, it is important to remember that many different services are encompassed within this category.

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

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

4.10 Sunningdale – Biannual retail surveys are conducted in Sunningdale to record the usage of each retail unit. Table 20 and Figure 12 show the composition of uses in the retail centre as it was at February 2009.

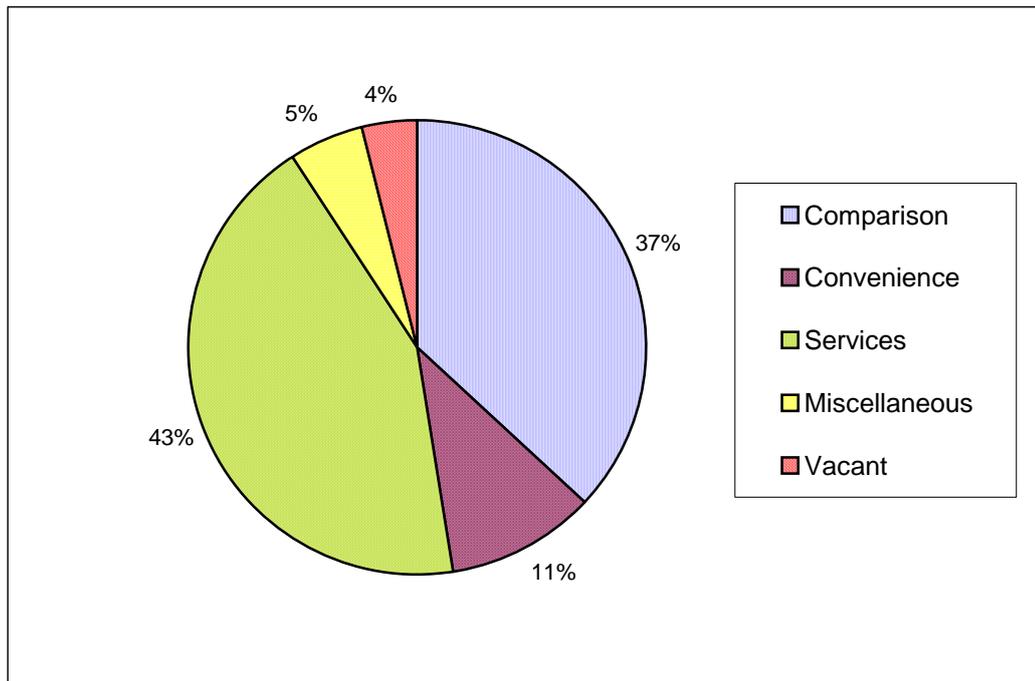
Table 20: Composition of Uses in Sunningdale

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

(Source: RBWM Retail Surveys, February 2009)

Health Check of Ascot and Sunningdale District Centres

Figure 12: Composition of Uses in Sunningdale District Centre, February 2009



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

Retailer Representations and Intentions to Change

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

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

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

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

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

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

Health Check of Ascot and Sunningdale District Centres

interior designers to boutiques and cafés to beauty salons. At time of publishing, there was no retailer requirement information available.

Vacancy Rates

4.18 Ascot - At the time of the last retail survey in February 2009 there were five vacant properties, equating to a 10% rate (see Table 19).

4.19 Sunningdale - During the last retail survey of Sunningdale in February 2009, there were two vacant units in the centre. This equates to a vacancy rate of 4%.

Commercial Yields

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

Pedestrian Flows

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

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

Accessibility

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

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

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

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

Local Views

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

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

Health Check of Ascot and Sunningdale District Centres

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

Perceptions of Safety and Crime

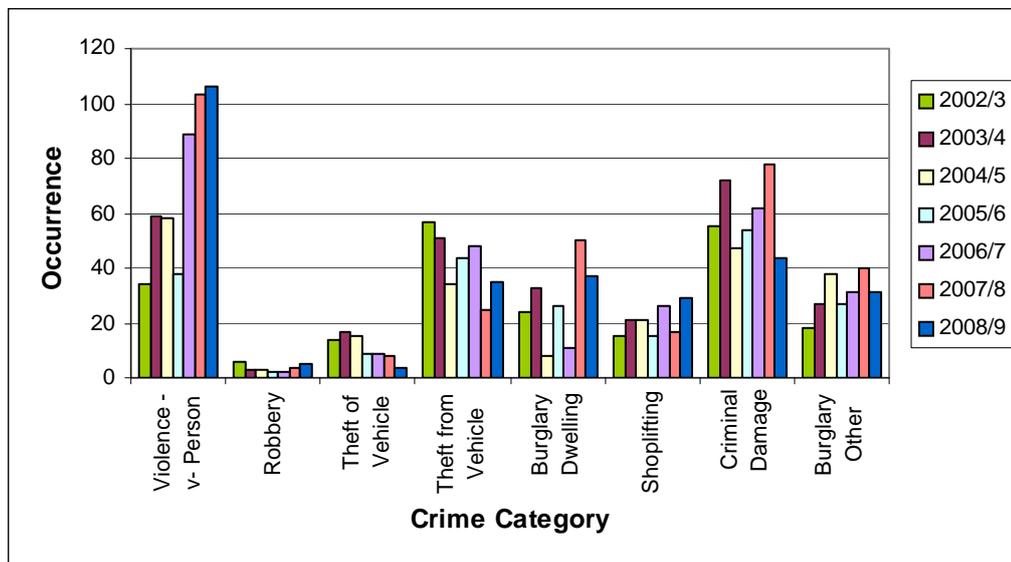
4.29 Ascot - There are four policing beat codes in Ascot: 1) Sunningdale; 2) Central Ascot/ Sunninghill/ Cheapside; 3) South Ascot/ Racecourse and 4) Blythewood. The South Ascot/ Racecourse beat incorporates Ascot High Street, the area of interest in this report.

Table 21: Crime Statistics For South Ascot/Racecourse

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

(Source: Thames Valley Police)

Figure 13: Crime Statistics For South Ascot/Racecourse



4.30 During the period of 2004/2005 all crime categories saw a decline from previous years, with the exception of shoplifting that remained static and burglary other, which had been rising steadily. In the 2008/9 period violence against the person; shoplifting; robbery; and theft from vehicles had all increased slightly on the previous year. Overall incidence figures have not altered dramatically year on year.

4.31 Sunningdale - The results for Sunningdale are varied; some categories show a decrease in occurrence, e.g. theft from vehicle, burglary and violence against the person, whilst in contrast shoplifting and theft of vehicle have more than doubled in the 2008/9 period.

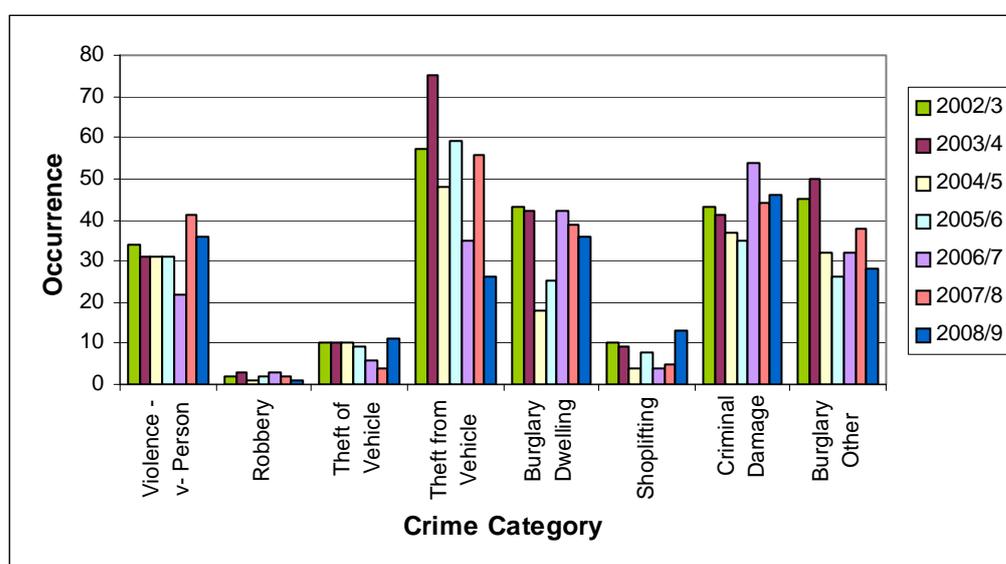
Health Check of Ascot and Sunningdale District Centres

Table 22: Crime Statistics for Sunningdale

Crime Category	2002/3	2003/4	2004/5	2005/6	2006/7	2007/8	2008/9
Violence -v- Person	34	31	31	31	22	41	36
Robbery	2	3	1	2	3	2	1
Theft of Vehicle	10	10	10	9	6	4	11
Theft from Vehicle	57	75	48	59	35	56	26
Burglary Dwelling	43	42	18	25	42	39	36
Shoplifting	10	9	4	8	4	5	13
Criminal Damage	43	41	37	35	54	44	46
Burglary Other	45	50	32	26	32	38	28

(Source: Thames Valley Police)

Figure 14: Crime Statistics for Sunningdale



4.32 Policing priorities for Ascot, Sunningdale and Sunninghill neighbourhood have been identified as burglary, anti-social behaviour and parking & speeding. Although there have been some rises in crime, overall levels are still relatively low, with the highest number of instances in any given category being 106 cases in 2008/9.

Environmental Quality

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

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

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

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

Health Check of Ascot and Sunningdale District Centres

Conclusions

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

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

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

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

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

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