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DACORUM BOROUGH COUNCIL

Dacorum Retail and Leisure Study

Report

Appendices

Contents

This report has been prepared by Donaldsons LLP. A List of the Partners of the firm is available for inspection at the principal office – 48 Warwick Street, London, W1B 5NL.

1 Executive Summary

1.1 In this Section, we summarise the principal findings and conclusions from our work on the Dacorum Retail and Leisure Study. In doing so, we focus particularly on the conclusions which potentially affect the future strategy for retail and leisure development in the Borough, to be incorporated into the new Local Development Framework (LDF). Within the main body of the report there are summaries of each principal section, as appropriate. A summary table of our retail capacity forecasts (Table 1.1) and a brief background to this is included at the end of this section.

Hemel Hempstead

1.2 In terms of retail hierarchy, Hemel Hempstead has substantially the largest and most important town centre in the Borough. Whilst the town centre has a somewhat limited retail content for its position in the sub-region, that retail content will be expanded by about 50% with the eventual completion of the new Riverside Centre. This scheme will enable the town centre to compete more effectively with Watford, Luton and St Albans (although it will remain smaller than those town centres in terms of retail floorspace).

1.3 Hemel Hempstead town centre is also an important services centre. At present, service businesses occupy almost as many shop units as do comparison goods retailers; although because they occupy smaller shops, service businesses account for a substantially lower proportion of floorspace than retailers (28% compared with 55%). Most of the retailers are concentrated into the pedestrianised part of Marlowes, and a high proportion of the service businesses are located to the north of Bridge Street. There is thus a division of function between the north and south parts of the town centre, divided by Bridge Street, with the north being principally services and the south principally retailing. The town centre as currently trading is reasonably vital and viable according to the indicators in PPS6. Its principal weakness is that it lacks sufficient shops and stores to be certain of retaining its position in the retail hierarchy in the long term. The new Riverside Centre will remedy this deficiency, and confirm Hemel Hempstead's role as that of an important town centre for the foreseeable future.

1.4 The Riverside Centre, will strengthen the south part of Marlowes in retail terms. In the longer term, we consider that there could be potential to consolidate further the prime retail area on the west side of Marlowes (south of Bridge Street) to build on the attraction of the Riverside Centre. Potential opportunities exist or could be created for one or more new prime retail developments in this area, subject to more detailed assessment. These could potentialy include development in depth onto the surface car park behind.

1.5 It will be some years before the need will arise for such development. Our capacity forecasts show that this will not occur before 2016, but that further town centre comparison goods retail development should become increasingly supportable from 2016 onwards. We therefore consider that the Council would be wise to identify this area at the south end of

Marlowes in general terms as an opportunity area for additional prime retail development in the long term.

1.6 Further to the north on Marlowes, the existing Civic Zone site north of Combe Street offers an opportunity for a new food and non-food superstore to accommodate the need for such new floorspace which we have forecast. In terms of the sequential approach, this site is the most suitable within the town centre for such a development, since there are no other sites closer to the prime retail area which could accommodate it.

1.7 There is likely to be interest from at least two superstore operators in such a new store on the Civic Zone site; and sufficient retail capacity is forecast to support it. A new superstore would help to tie together the town centre and Old Town in retail terms; and if good pedestrian links to the latter are provided, could help to improve its vitality and viability. The expanded Civic Zone site including the Market site to the south between Combe Street and Bridge Street, would also be suitable for some comparison goods retailers which need large floorplan stores, but are unable to afford the rents in a town centre scheme such as the Riverside Centre. However, the more such floorspace is developed on this site, the longer it would be before further prime retail development at the south end of Marlowes would be supportable.

1.8 In addition to the forecast need for a new food and non-food superstore on the Civic Zone site, we forecast a need for more food store floorspace elsewhere in the town. If a new superstore on the Civic Zone site is operated by Asda, with the existing Asda store going out of food retail use, there would be capacity for one or two discount supermarkets early in the period 2006 to 2011, potentially followed by an additional superstore by about 2016. If the new superstore on the Civic Zone site is operated by another retailer, and Asda remains on its present town centre site, there would only be sufficient capacity for two or three discount supermarkets early in the period 2006 to 2011, together with some limited additional floorspace later in the forecasting period, such as modest extensions to existing food stores. Since there are no discount supermarkets in Hemel Hempstead at present, the overall food retail offer in the town would become more complete if some were developed at an early stage, than if a second new superstore was permitted (in addition to a new superstore on the Civic Zone site).

1.9 We also forecast a need for a limited amount of new bulky goods retail warehouse floorspace. The vacant site adjacent to Jarman Park has been allocated for such retail development (along with a potential mix of other uses) in the adopted Local Plan, and the site is currently being marketed for a scheme of about 6,500 sq m gross retail floorspace. Our forecasts show that by the time this committed scheme has opened and established a settled pattern of trade (in about 2007/8), there will be sufficient expenditure available to support it. This is on the basis that the new retail warehouses are granted permission subject to a bulky goods condition, which prevents the sale of clothing and footwear and other non-bulky goods in which the town centre specialises. We therefore consider that such a condition should be applied; together with a condition controlling the addition of floorspace through internal alterations.

1.10 In the longer term, capacity for further comparison goods floorspace will arise. This should be developed in locations which comply with the sequential approach, and will not therefore necessarily be available to support further out-of-centre retail warehouses or additional comparison goods floorspace in large food stores. If and when it is decided to proceed with further new prime retail development at the south end of Marlowes, most of the forecast growth in comparison goods expenditure will probably be needed to support it. We do not therefore think there is any need to allocate any additional sites for out-of-centre retail warehouse development in the LDF.

1.11 There is already a reasonably good supply of commercial leisure facilities in Hemel Hempstead for a town of its size. In addition, a range of such attractions is available in nearby towns such as Watford and St Albans. We are unable to identify any pressing needs for additional commercial leisure development in Hemel Hempstead. However, we consider that the town centre would benefit from additional A3 cafés and restaurants, some of which could potentially be included in mixed use development on the Civic Zone site.

Berkhamsted

1.12 In hierarchical terms, Berkhamsted is substantially secondary to Hemel Hempstead. The town centre is much smaller, and has a limited range of retailers. The comparison goods shops cater for the day-to-day needs of the local population; whilst the food stores meet much of their main food shopping needs. In terms of its function, Berkhamsted town centre is substantially more important as a services centre than as a retail centre. Thus 57% of the shop units are occupied by service businesses, compared with 39% occupied by retailers. Because there are few large stores in the town centre, the balance is similar when measured by floorspace (54% services and 42% retailers).

1.13 As shown by the PPS6 indicators of vitality and viability, Berkhamsted town centre is performing well for its size and type. Many such small town centres have been under pressure from larger centres and have struggled to provide an attractive shopping offer. Whilst Berkhamsted town centre's retail offer is limited, it has become a very important services centre. This, coupled with its very attractive historic environment, should ensure a vital and viable future for the town centre. However, it will be essential that 'anchor' food shopping is not decentralised to out-of-centre sites from the core retail area.

1.14 We are not able to forecast a need for any additional convenience goods floorspace in the town centre throughout the period to 2016; and only a small need (of up to about 250 sq m net) by 2021. This does not necessarily mean that no additional food store floorspace should be developed, but that there is no requirement for the Council to identify any sites for such development. We forecast capacity for a modest increase in comparison goods floorspace, which would be sufficient to support the comparison goods floorspace in a new foodstore, if for example, Tesco was to relocate to a larger and more modern store on the Water Lane car park site (site S1 in adopted Local Plan). Otherwise, it would be sufficient to support small scale incremental development, such as changes of use and extensions to existing buildings, and infill developments.

1.15 There is currently moderate demand from retailers and service businesses for additional shops in Berkhamsted. In the event that support grows for such new development in the town centre, the Water Lane car park site would be the most suitable in terms of the sequential approach. This site is immediately adjacent to the retail core of the town centre, and close to the rail station. It would be suitable for a high density mixed use development including residential and possibly offices, and perhaps anchored by a replacement Tesco store or a discount supermarket. The Stag Lane site is owned by Tesco who have unsuccessfully sought to secure a new foodstore there. In contrast, this is out-of-centre in terms of the sequential approach, and would be unsuitable in those terms for new retail development.

1.16 Commercial leisure facilities in Berkhamsted are currently limited mainly to A3 café and restaurant uses and health and fitness facilities. We are unable to identify any pressing needs for these or other commercial leisure developments in Berkhamsted.

Tring

1.17 Tring is the smallest of the three town centres in Dacorum. In the hierarchy of shopping centres it functions as a small town centre serving only the day-to-day local shopping needs of the town's population. It also meets about half of the convenience goods shopping needs of the catchment zone in which it is located. Like Berkhamsted, Tring is more important as a local services centre than as a shopping centre. Services account for 67% of all shops, compared with 29% occupied by retailers. In terms of floorspace, the proportions are 62% and 35% respectively. This reflects national trends in secondary shopping locations such as small town centres, where there has been a reduction in retailing accompanied by an increase in services in recent years.

1.18 Overall, Tring town centre is holding its own as an important small services and shopping centre. However, it would benefit from upgrading of Dolphin Square; and from the attraction of a new food store, such as a discount supermarket, to complement Budgens and Tesco. We forecast that there will be sufficient capacity in terms of catchment area expenditure to support such a store in the next few years. There is also retailer interest in opening a new food store of this type.

1.19 The site which would best comply with the sequential approach, and which would be suitable in commercial terms for such a new food store, is the Cattle Market site and adjacent car park. This would be an edge-of-centre site in PPS6 terms. It is only a few minutes walk from Dolphin Square, and would therefore have the potential to reinforce the existing retailing and services in the town centre. However, the existing car park and market are both important to the vitality and viability of Tring town centre. We do not therefore think that this site should be allocated for a new discount food store unless suitable replacement locations for the car park and market can be found close to the retail core of the town centre. We are not aware of any such relocation opportunities.

1.20 Apart from a medium sized new food store, we are unable to forecast capacity for substantial additional retail floorspace in Tring. We expect sufficient capacity to support the comparison goods floorspace in such a new food store, together with small scale incremental expansion of existing floorspace. However, forecast capacity will not be sufficient to support a substantial new shopping centre in the town centre. There is also virtually no retailer demand for new comparison goods shops. There is therefore no requirement for the Council to allocate any sites for such new development in Tring.

1.21 Tring already has some A3 café and restaurant uses, together with health and fitness facilities. Being close to Aylesbury, it also has larger scale commercial leisure facilities within easy reach. We have been unable to identify any particular needs for new leisure facilities in Tring, and there is therefore no requirement for the Council to identify any sites for such development in the town.

Quantitative Need for Retail Development

1.22 This study includes the preparation of up to date forecasts of the capacity for additional retail floorspace in the study area, which will be supportable by increases in the population and expenditure of catchment area residents and visitors. The forecasts have been made with the aid of our RECAP retail capacity forecasting Model, based on the results of an up-to-date household interview survey of shopping patterns in the combined catchment area of the three main towns in the Borough. The RECAP Model is an exploratory tool, rather than a prescriptive mechanism. The forecasts summarised in Table 1.1 are therefore a realistic guide to the level of additional floorspace which will be supportable by growth in expenditure. They are not intended as growth targets or rigid limits to future growth. The longer term forecasts are necessarily less robust than those for the shorter periods ahead; and we recommend that the forecasts are periodically revised and updated as development proceeds and its effects become measurable.

1.23 The forecasts summarised in Table 1.1 envisage two possible scenarios:

Scenario 1 – the 'baseline' scenario, which assumes that there will be no change in the market shares of available expenditure attracted from the catchment area through the period to 2021.

Scenario 2 – which more realistically assumes that the committed Riverside development in Hemel Hempstead town centre, potential new food superstore on the Civic Zone site in the town centre, and committed retail warehouse development at Jarman Park increase the market shares of expenditure attracted from the catchment area. In this scenario, we also take account of expected new developments in competing towns.

1.24 Table 1.1 distinguishes between the capacity for additional convenience and comparison goods floorspace, as follows:

- Convenience goods: Food, alcoholic drink, tobacco products, newspapers and periodicals, non-durable 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.

Table 1.1

Summary of Retail Capacity Forecasts

Goods/Scenario/Location	2011 (sq m net)	2016 (sq m net)	2021 (sq m net)	RECAP Model Table (Appendix 9)
Convenience Goods:				
Scenario 1:				
Hemel Hempstead Town Centre	1,400	1,750	2,100	12
Hemel Hempstead Non-Central	1,800	2,600	3,400	21
Berkhamsted	-250	0	250	29
Tring	400	550	700	37
Scenario 2:				
Hemel Hempstead Town Centre	2,300	2,700	3,150	40
Hemel Hempstead Non-Central	2,550	3,400	4,250	43
Berkhamsted	-250	0	250	46
Tring	400	550	700	49
Comparison Goods:				
Scenario 1:				
Hemel Hempstead Town Centre	-5,100	3,700	14,050	12
Hemel Hempstead Non-Central	-2,250	1,850	6,550	21
Berkhamsted	1,850	3,650	5,750	29
Tring	1,050	2,050	3,250	37
Scenario 2:				
Hemel Hempstead Town Centre	1,450	11,450	23,250	40
Hemel Hempstead Non-Central	7,750	13,450	19,850	43
Berkhamsted	1,250	3,000	4,950	46
Tring	700	1,700	2,800	49

Source:

RECAP Model Tables in Appendix 8 as indicated, rounded to the nearest 50 sq m net.

Notes:

The forecasts in Table 1.1 are cumulative, ie. The forecasts for each date include the forecasts for the previous dates and are not additional to those earlier forecasts.

For comparison goods floorspace in Hemel Hempstead town centre, the forecasts are for new floorspace additional to Riverside Centre.

For Hemel Hempstead non-central, committed new retail warehouses at Jarman Park (expected to be about 5,525 sq m net) should be subtracted from the forecasts to arrive at the need for further comparison goods floorspace.

2 Introduction

2.1 Donaldsons was commissioned in February 2005 by Dacorum Borough Council to undertake a Retail Capacity and Leisure Study for the Borough. The purpose of which was to guide decisions on the amount and location of future retail floorspace and leisure development to be identified in the LDF. The study examines retail growth until 2021 to cover the timescale of the LDF.

2.2 The aim is to prepare a study that will ensure the Borough can fulfil its potential as a thriving area, as well as respond to increased competition from other centres such as Watford, St Albans, Luton and Aylesbury. The retail capacity and leisure study focuses predominantly on the main towns in the Borough: Hemel Hempstead, Berkhamsted and Tring.

2.3 In particular, the study seeks to:

- Inform the development of the Civic Zone in Hemel Hempstead.
- Inform the LDF process.
- Improve understanding of the patterns of retailing in the Borough and how the various retail sectors can be strengthened.
- Show how the three towns can move forward through the plan period.
- Provide a detailed analysis of retail frontages and advice on appropriate planning policies for the different parts of each town centre.
- Assess demand for additional leisure facilities within the Borough.
- Assess potential development sites for their suitability to be developed for retail or leisure uses.
- Provide an element of public consultation through a postal survey of retailers and service businesses.

2.4 This assessment has examined the strengths and weaknesses of the town centres in terms of current mix of shops, services and other land uses, and the identification of gaps in provision. A variety of data sources have been used in undertaking this study including Experian Goad data on shop floor space, the Focus database for information on retailers' requirements and the VOA for information on yields.

2.5 Sections three, four and five of this report contain a health check of each of the main centres, Hemel Hempstead, Berkhamsted and Tring respectively, drawing on the indicators set out in Chapter 4 of PPS 6. In summary these indicators are:

- Diversity of uses;
- Retailer representation;
- Shopping rents;
- Commercial yields on non-domestic property;
- Proportion of vacant street level property;
- Pedestrian flows;
- Accessibility;

- Customer views and behaviour;
- Perception of safety and occurrence of crime; and
- State of town centre environmental quality.

2.6 In order to assess the vitality and viability of the three centres, we have drawn upon Experian Goad data, combined with observations gained from site surveys and commentary shoppers and retailers, where appropriate. In order to provide information on customer views and behaviour, we designed and commissioned an on-street survey of shoppers and other users of each centre. We have also undertaken a postal survey of local businesses in each of the three centres, to ascertain their views on each centre as a trading location. It is intended that this assessment will provide a broad indication of the 'health' of each centre, and of the recent trends in key indicators.

2.7 In section six, we describe our analysis of the retail frontages in three town centres, and our recommendations for frontage designations and planning policies for change of use in the new Local Development Framework.

2.8 Section seven comprises our analysis of the potential for additional commercial leisure development in the Borough. It includes assessment of the supply of and demand for new facilities. Section eight sets out our findings on retailer demand following our correspondence and discussions with the main food retailers, and analysis of retailers' requirements. This work was undertaken in order to provide a check on our retail capacity forecasts if operators are interested in locating in the area, this can be a further indication of need for new retail floorspace.

2.9 Section nine describes our forecasting of retail capacity in the study area. It describes the technical basis of our RECAP forecasting Model; and sets out the retail capacity forecasts and our overall assessments of the need for new retail development in each of the three towns. Section ten identifies potential retail and leisure sites in the area and analyses them with regard to their retail/leisure potential as future sites for development.

2.10 Our principle findings and conclusions on each topic are set out at the end of each section of the report, and are summarised in the Executive Summary.

3 Hemel Hempstead Town Centre

3.1 In this health check we consider the vitality and viability of Hemel Hempstead town centre drawing on the indicators set out in chapter 4 of PPS6. In order to assess the vitality and viability of Hemel Hempstead town centre, we have drawn upon Experian Goad data, combined with the observations gained from the site visits and commentary from shoppers and retailers where appropriate. We have also undertaken a postal survey of local businesses to ascertain their views on the centre as a trading location, and these are included within this section. A similar approach has been taken for the other town centres in Chapters 4 and 5.

3.2 This study has concentrated on Hemel Hempstead Town Centre i.e the principal shopping area along and off Marlowes. There is a secondary shopping area within the town centre, to the north of the main retailing core, Hemel Hempstead Old Town. This location is designated as part of the Town Centre within the hierarchy of towns in Dacorum. Hemel Hempstead Old Town is an attractive centre providing specialist retailers such as wine merchants, angling centres and house furnishing stores. The centre also provides an important service function for nearby residents, although it has a limited local shopping role. This area is divorced from the main retail centre and is relatively small. There is little retail information on this area and therefore it has been treated as a specialist local centre and largely excluded from this report. However, we comment on its future role and potential in relation to possible retail development on the Civic Zone site. We also comment on other local centres in Section 9 below.

3.3 Hemel Hempstead town centre contains 232 retail and service units. The centre's primary shopping frontage or traditional 'High Street' is along Marlowes (although High Street itself is located in Old Town). The centre's main purpose-built indoor shopping mall, Marlowes Shopping Centre is located on the east side of Marlowes and has two main entrances to the street. Marlowes is predominantly pedestrianised and anchored by the Marlowes Centre and Marks and Spencer at the south end and Asda (behind the east façade) at the north end. A summary of the main 'areas' of the centre is included in Table 3.1.

Table 3.1: Summary of main shopping areas in Hemel Hempstead Town Centre

Street	Description
Marlowes	Main 'high street' – this is the centre's core shopping area. Pedestrian only.
Bridge Street	Street to the north of Marlowes, mainly services. Access only except buses and taxes.
Market (in the Square)	Takes place Thursday to Saturday with an Antiques market on Wednesday.

Source: Donaldsons, 2005

Diversity of Uses

3.4 Table 3.2 sets out the occupancy of the units within Hemel Hempstead town centre in terms of the retail categories for convenience, comparison, service and vacant units. This is set against the national average for town centres to provide a comparison.

Table 3.2: Retail and services provision in Hemel Hempstead town centre by number of units

Type	No of Units	% of Total	National Average %	Variance %
Comparison	110	47	48	-1
Convenience	12	5	9	-4
Service	103	44	30	+14
Vacant	7	3	11	-6
Total	232	100		

Source: Experian Goad, November 2003

Notes: Percentages do not always sum to 100% because of rounding.

3.5 Table 3.2 demonstrates that the number of comparison goods retail units in Hemel Hempstead, in November 2003, was marginally below the national average. However, the number of convenience units was well below the national average. The number of service units is significantly above the national average, with a strong degree of variance (14%), shows that the centre is functioning as an important service centre. Vacancy levels are low in the town centre.

3.6 Table 3.3 shows the amount of floorspace occupied by the various sectors within Hemel Hempstead town centre.

Table 3.3: Retail and service floorspace provision in Hemel Hempstead Town Centre

Type	Sq m	% Floorspace in Town Centre	% gross floorspace UK	Variance %
Comparison	32,643	55	53	-2
Convenience	7,366	13	17	-4
Service	16,219	28	20	+8
Vacant	2,613	4	8	-4
Total	58,841	100		

Source: Experian Goad, November 2003

Notes: Percentages do not always sum to 100% because of rounding.

3.7 Again the service provision is higher in floorspace terms, showing a strong degree of variance 8%, and the importance of the town centre for services.

3.8 The retailing and services in Hemel Hempstead town centre are supplemented by a number of important public buildings; including a library, job centre, tourist information centre, Magistrates Court, Police Station, and various office buildings located at the rear of the retail area along Marlowes.

3.9 In respect of the future for Hemel Hempstead town centre, a number of schemes are in the pipeline for new development which will broaden the diversity of use in the town centre. The most significant scheme is the Riverside Development, now at an advanced stage of construction, which extends to 26,756 sq m and includes retail and A3 uses. Further ahead development of the Civic Zone site (at the north western part of the Marlowes) promoted by the Council; is expected to include a food and non-food superstore, together with new civic buildings and other uses.

Retailer representation

3.10 A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can enhance the appeal of a centre to shoppers. In November 2003, 113 of the 232 units in Hemel Hempstead were occupied by multiple retailers (49%). This figure is well above the national average of 34% (although the national average also includes a large number of smaller centres in which there are few multiple retailers).

3.11 According to Focus, Hemel Hempstead has 65% of the top 20 retailers[1] present including: Boots, Marks and Spencer, Argos, Woolworths, WHSmith, Next, Dixons, Superdrug, Wilkinson, Littlewoods, New Look, Dorothy Perkins and Rosebys. Those not represented at the date of survey include Debenhams, John Lewis, BHS, Lloyds Pharmacy, Co-op Department Stores and HMV. However Debenhams is the 'anchor' department store in the new Riverside development.

3.12 Retailer demand to locate in a town centre provides a good indication of the health of a town centre. Table 3.4 highlights the current requirements from comparison goods retailers and service businesses for Hemel Hempstead. The minimum figures are the totals of each company's minimum, and the maximum the totals of their maxima. Altogether a total of 38 retailers and service businesses have expressed a demand for floorspace within Hemel Hempstead town centre.

Table 3.4: Retailer Requirements Within Hemel Hempstead

	Comparison	Service	Total
No. of requirements	26	12	38
Sq m Minimum	19,060	1,930	20,990
Sq m Maximum	36,986	3,134	40,120
Sq ft Minimum	205,160	20,774	225,934
Sq ft Maximum	398,114	33,734	431,848

Source: Focus, 2005

3.13 Convenience goods retailers such as the main supermarket operators and small independent convenience store retailers do not usually post their requirements on databases such as Focus.

[1] The definition of top 20 retailers is that these are the top 20 comparison goods multiples ranked by ORC's (international research company) forecast of average town centre sales for individual retailers within Great Britain.

We have therefore undertaken a postal survey (with follow-up by telephone) of all the main food retailers to assess their interest in taking new stores in Dacorum. The results of this survey are set out in section eight of this report.

3.14 The main multiple retailers within Hemel Hempstead are situated along Marlowes and within the Marlowes Shopping Centre. Currently Marlowes Shopping Centre is the only indoor shopping centre in Hemel Hempstead; however a second centre, Riverside Centre is in its final stages of construction. The Marlowes Shopping Centre has two entrances along Marlowes shopping street. The centre opened in 1990. It is anchored by Marks and Spencer, Littlewoods and Wilkinson and accommodates other multiple retailers including Dixons, H Samuel, River Island and The Body Shop.

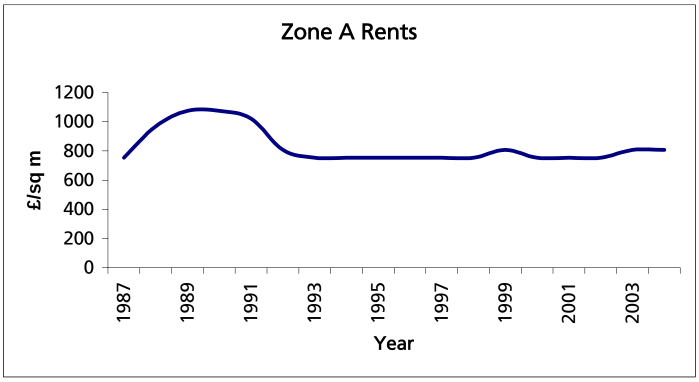
3.15 The market offer of the town centre is currently mid to lower market (the latter often described as 'value retailing'). There are a number of discount comparison goods stores, such as Poundland, Primark and Wilkinson, together with several charity shops. In terms of the services sector, there are a number of A2 professional and financial services present amongst the comparison goods retailers in the centre, including Barclays, Woolwich, HSBC and Halifax. In addition, a number of fast food outlets, cafes and restaurants, bars and public houses, estate agents and employment agencies are also located in the town centre. There are some convenience stores in the centre, including a 3,660 sq m Asda and an Iceland extending to 1,240 sq m (figures are gross taken from Experian Goad Data), as well as bakeries and wine merchants.

Shop Rents

3.16 The level of rent which retailers are prepared to pay for retail space within a centre is an indication of the perceived attractiveness of that centre (although other factors such as the availability of floorspace have an impact on rental value). Rental values can also provide a measure of the primacy of streets and locations within a town centre.

3.17 Zone A rental values for a shop 'of optimum size and configuration in prime pitch' within Hemel Hempstead of £800/sq m can now be achieved (Focus, 2004). As graph 3.1 shows the rents within Hemel Hempstead remained at a fairly steady level of £700/sq m after a drop from £1,100/sq m in the early 1990s; followed by the recent rise to about £800/sq m from 2003.

Graph 3.1: Prime Zone A Rents



Source: Focus 2005

3.18 In terms of zone A rents, Hemel Hempstead has lower rents than neighbouring towns as Table 3.5 demonstrates. High Wycombe is very comparable in terms of size with Hemel Hempstead, but has a rental level that is £108 higher than that in Hemel Hempstead.

Table 3.5: Zone A Rents in Neighbouring Towns

Town	Zone A / sq m
Aylesbury	1076
St Albans	1237
Luton	1883
High Wycombe	915
Hemel Hempstead	807
Watford	3300

Source: PMA, 2004

3.19 At the time of writing, according to Egi, one retail/leisure unit is on the market at 198 Marlowes, extending to 1,157 sq m for £2,600,000, maintaining a rental income of £165,000 per annum. Further, six units are available to let and these are summarised in table 3.6 below. The units available are for A3 use and A1 use. A majority of the units are between 100-150 sq m and the average price is £265/sq m.

Table 3.6 Availability of retail units to let in Hemel Hempstead

Address	Size	£ pa	£/ sq m	Date	Comments
123, Marlowes, HP1 1BB	82 – 110 sq m	£22,000	£200-£270	11th Feb 05	Restaurant/Café to let
Unit 4, The Marlowes Centre, HP1 1DX	111 sq m	£42,000	£378	24th Feb 05	Assignment of a retail unit lease
239 Marlowes, HP1 1BL	153 sq m	£65,000	£425	22nd March 05	Retail unit to let
4 –8 Queensway, HP1 1LR	103 sq m	£25,000	£243	31st March 05	Restaurant/ Café to let
Charleston House, 13 High street, HP1 3AA	28 sq m	£8,500	£304	31st March 05	Retail unit on the High Street
Unit 3, Shenley Road, HP2 7QH	121 sq m	£15,000	£124	1st April 05	Restaurant/ café to let

Source: Egi, 2005

3.20 Table 3.7 summarises leasehold transactions that have been completed in the last six months within Hemel Hempstead:

Table 3.7: Leasehold transactions in last six months

Address	Size (sq m)	£ pa	£/ sq m	Date	Comments
146 Marlowes, HP1 1EZ	72	£20,000	278	7th Dec 2004	Leasehold Property
160 Marlowes, HP1 1DQ	187	Not available	Not available	6th Dec 2004	Leasehold, Restaurant
Riverside, HP1 1BL	1,263	Not available	Not available	1st Dec 2004	Pre let to clothes outlet H&M
Unit 219, The Marlowes, HP1 1DX	183	£41,400	£226	24th Nov 2004	Assignment to a jewellers for two years
Unit at Apsley Mill Retail Park, HP3 9QN	929	Not available	Not available	15th Nov 2004	Leased to Argos
Riverside, HP1 1BL	465	Not available	Not available	18th Oct 2004	Pre let to Waterstones
Unit 222, The Marlowes, HP1 1DX	98	Not available	Not available	18th Oct 2004	Leased to The Card Factory

Source: Egi, 2005

3.21 As table 3.7 shows there have been a number of transactions within Hemel Hempstead, mainly within the main shopping area, Marlowes. A number of pre-lets have been secured for the Riverside Centre including Waterstones, Debenhams, Next and H&M.

Commercial Yields

3.22 The commercial yield on non-domestic property is an indication of the confidence of investors in the rental growth potential of a town centre. However, both Government and the RICS have warned that this requires careful analysis and its limitations must be understood. The yield on a property investment represents the return (in the form of rent) on capital to an investor. As property investments do not usually produce a fixed income (i.e. rents are reviewed – usually upwards only - according to market conditions, under the terms of the property's lease), the greater the prospect of future rental growth, the lower the initial yield which an investor would be prepared to accept. Conversely a higher yield reflects a lower expectation of future rental growth prospects. Yields are therefore an indicator of expectations of rental growth and thus of the general economic prospects for a town centre.

3.23 Research by the VOA has tracked shopping centre yields from 1994 – 2004. From the data Hemel Hempstead has held its yields since 1996 at 6%. From table 3.8 an average yield of 6.8% is evident suggesting that yields along Marlowes may have increased slightly at the beginning of 2005. Table 3.8 summarises the most recent investment sale transactions.

Table 3.8: Recent Investment Sale Transactions

Address	Date	Deal type	Size (sq m)	Sale Price (£)	Yield %
140, Marlowes, HP1 1EZ	28th Feb 05	Leasehold Investment sold at auction	84	273,000	6.96
136, Marlowes, HP1 1EZ	28th Feb 05	Freehold Investment sold at auction	82	284,000	6.16
138 Marlowes, HP1 1EZ	28th Feb 05	Leasehold Investment sold at auction	76	220,000	7.17
146, Marlowes, HP1 1EZ	28th Feb 05	Leasehold Investment sold at auction	72	300,000	6.67
142, Marlowes, HP1 1EZ	28th Feb 05	Leasehold Investment sold at auction	72	270,000	6.83
144, Marlowes, HP1 1EZ	28th Feb 05	Freehold Investment sold at auction	72	300,000	6.33
135, Marlowes, HP1 1BB	17th Feb 05	Freehold Investment sold at auction	56	350,000	6.60

Source: Focus 2005

Vacant Retail Property

3.24 The proportion of vacant street level property provides a strong indication of the health of a town centre. It should, however, be considered with a degree of caution as vacancies can arise even in the strongest town centres, particularly where properties are undergoing alteration. According to Experian Goad, Hemel Hempstead has seven vacant outlets, which account for 3% of total retail and services' units in the town centre. In comparison with the national average (10%), Hemel Hempstead is performing well according to this indicator, and has achieved low levels of both vacant floorspace and number of units. In terms of location the vacant units are mainly located in side streets off Marlowes, in secondary shopping areas. Marlowes itself has very few vacant units.

Pedestrian Flows

3.25 There is very limited information on pedestrian flow counts within Hemel Hempstead town centre which would be of particular use to this study, as the most recent survey is now several years out of date. For data to be relevant to assessing the relative flows in different streets, and thus identifying prime and secondary shopping areas it needs to be up to date. To assess trends in the absolute numbers of people using the town centre (rather than changes in relative flows between different streets), frequent counts would need to be undertaken in specific areas, either weekly or monthly over a period of years. Recordings should note any external events, which may affect the pedestrian flow, such as the weather, or any national event, which may prevent people from behaving normally. Some data has been collected by the Council however for our purposes these counts have not been taken frequently enough to prove reliable.

3.26 On the day of our site inspections, a Monday morning, Marlowes was relatively busy with people shopping. The area outside the Marlowes Centre had higher pedestrian activity than the area to the north of Bridge Street. Marlowes and the Marlowes Centre are clearly the prime retail area in terms of pedestrian flows.

Accessibility

3.27 Hemel Hempstead town centre is located south of Luton and west of St Albans. It is situated approximately 5 km from junction 20 of the M25 along the A41. The town centre is easily accessible by public transport. Hemel Hempstead is on the main line between London Euston and Rugby. Trains run from London about every 20 minutes, with a journey time of around 25 minutes. The town has good access to main airports provided by a bus service, which runs from Gatwick via Heathrow and Luton to Hemel Hempstead, every hour.

3.28 There is a good choice of bus services serving Hemel Hempstead town centre including the following routes:-

- 1 Adeyfield – Bus Station Via Turners Hill
- 2 Woodhall Farm – Gadebridge & Chaulden Via Grovehill – Highfeild – Hemel Town Centre – Hemel Station
- 3 Long Chaulden – Woodhall Farm via bus station
- 4 & 5 Bennetts Gate – Grove Hill via Town Centre
- 5 & 6 Maple Cross – Hemel Hempstead Via Hemel Hempstead Station (6)– Adeyfield (6)– Leverstock Green (6)– Bedmond (6)– Abbots langley (5)– Garston (5 & 6)– Watford Junction (5 & 6)– Watford Town Centre (5 & 6)– Rickmansworth (5 & 6)– Berry lane Estate (5)– Maple Cross (6)
- 6 Watford – Hemel Hempstead via Leverstock Green – Bedmond – Garston
- 6 & W6 Maple Cross – Hemel hempstead Via Leverstock Green – Bedmond – Garston – Watford – Croxley Green – Rickmansworth
- 10 Leverstock Green – Rail Station Via Crabtree Lane
- 11 Chambersbury Lane – Bus Station Via Crabtree Lane
- 12 Morth End Farm – Bus Station Via Adeyfield – Jarman Park – Bennetts Gate
- 13 Maylands Avenue Industrial Area – Rail Station Via Long Chaulden – Gadebridge
- 14 Maylands Avenue Industrial Area - Woodhall Farm Via Highfield
- H19 & H20 Hemel Hempstead - Abbots Langley Via Bedmond - Kings Langley - Apsley
- H22 Gadebridge Park - General Hospital Via circular service via Town Centre
- 30 & 31Aldbury - Hemel Hempstead Via Water End - Great Gaddesden - Ringshall - Berkhamsted - Northchurch - Tring
- 46 Luton - Hemel Hempstead Via Redbourn - Flamstead - Markyate - Slip End
- 52 Hemel Hempstead - Amersham Via Chesham - Bovingdon
- 322 Northchurch - Watford Via Kings Langley - Hemel Hempstead - Berkhamsted

- 340 Welwyn GC QE2 Hospital – Hemel Hempstead via Welwyn Garden City – Hatfield – St Albans City
- 352 Watford – Hemel Hempstead via Bvingdon – Chipperfield – Sarratt Green
- 500 Watford – Aylesbury Via Tring – Berkhamsted – Hemel Hempstead – Kings Langley
- Green Line 758 London, Victoria – Hemel Hempstead Via M1 motorway – Brent Cross – Finchley Road – Baker street – Marble Arch – Hyde Park Corner – London Victoria
- Central Line 300 & 301Hitchin – Hemel Hempstead Via Hitchin – Stevenage – Welwyn Garden City – Hatfield – St Albans – Hemel Hempstead

3.29 The Bus Station (not covered) is on Waterhouse Street, immediately west of the Market. In addition there are a number of bus stops with modern shelters in and around Hemel Hempstead town centre. The principal stops are located on Bridge Street. On our visit to Hemel Hempstead town centre, we did not see any evidence of real-time bus information systems in use.

Parking

3.30 Hemel Hempstead town centre has ten car parks available for shoppers and two car parks located further out of the centre. The town centre car parks provide a range of short term and long term parking. There are approximately 550 short term spaces and 550 long term spaces. Additionally there are a further 100 short term spaces and 100 long term spaces in the local area. There are a limited number of on-street parking facilities, with some provision for disabled users.

3.31 In terms of car park quality, all of the main car parks within Hemel Hempstead have been assessed. We used a proforma to assess each car park individually. A copy of the proforma and a complete table of results is included in Appendix 1.

3.32 The main strengths of the car parks surveyed was the high level of cleanliness and the quality of the car park surfaces. The main car parks had very little litter and graffiti and were generally neat and tidy. All the car parks were tarmaced and were in good condition, though the surface of the car park on London Road Apsley (near the community centre) could be improved.

3.33 The main weaknesses of the car parks include the somewhat limited level security, and the amount and location of signage to car park entrances. Most of the town centre car parks have CCTV, however none have secured status, and at the time of visit no security patrols in any of the car parks were observed. Those car parks sited away from the centre have little or no security, and they also have lower levels of lighting. The signage to many of the car parks is poor, either the car park is not clearly signed from main roads or the signs are partially obscured by trees.

Customer Views and Behaviour

3.34 In accordance with the project brief, we designed and commissioned an on-street survey of shoppers and other town centre users. This was based on a random sample of 404 interviews, at locations along Marlowes; with interviewing conducted in May 2005 on a consecutive Thursday, Friday and Saturday between 9.00am and 6.00 pm. The questionnaire was designed by Donaldsons following consultation with Dacorum Borough Council. 75 interviews were conducted on Thursday, 104 on Friday and 225 on Saturday. Details of the survey conducted as well as a breakdown of results is included in appendix 2 of this report. Appendix 2 also contains the result of similar surveys undertaken in Berkhamsted and Tring.

Purpose of Visit to Hemel Hempstead Town Centre

3.35 Respondents were asked what was the main purpose of their visit to Hemel Hempstead town centre on the day of the interview. 44% of all respondents stated that they were doing non-food shopping, and 13% food shopping. 9% of all respondents indicated that they were using the centre's financial services, 9% also stated that they work in or near the town centre. Other reasons stated for visits were leisure purposes, meeting friends, business, visiting restaurants and shopping in the market.

3.36 In terms of secondary purposes for visiting the town centre, 46% of respondents stated that they were there for nothing else other than their primary reason. Of those people that had a secondary reason, food shopping and non-food shopping were the most popular activities. However 6% of all respondents indicated that their secondary reason was to visit the financial services available, 5% were there to go to restaurants and 3% stated that their secondary reason was to visit the market.

Reasons for Choice of Hemel Hempstead for Shopping or Services

3.37 Question five asked respondents why they had chosen to come to Hemel Hempstead town centre on that day for shopping and services. 77% of all respondents said it was because it was close to home, close to work or close to friends or relatives. This indicates that the majority of respondents were visiting the centre because its location was convenient to them, i.e. because of proximity factors. The remaining 23% came to Hemel Hempstead due to what can be described as attraction factors, such as the 1% of all respondents who indicated they came to Hemel Hempstead to visit the 'good foodstores' and the 1% who came because it was an attractive place to visit. 2% stated they came to the centre because it was 'easy to get to by public transport; with the remaining 19% visiting for a wide variety of different reasons, such as visiting for a day out, collecting their car from the garage or acting as a child escort.

3.38 Few people answered the question asking them to specify which particular shop/service they intended to use, of those that did, 16% stated that they would use various shops and services. Amongst other reasons, 16% stated that they had a medical appointment. 12% of respondents were going to the bank and 8% of respondents were visiting church. 8% were specifically visiting the patchwork shop and 8% were there to go to Primark. Other shops and services particularly mentioned included Poundland, the Post Office, Ann Harvey and the shopmobility service.

Goods Purchased

3.39 Question 6 asked what respondents had bought or expected to buy in Hemel Hempstead town centre on that day (respondents could give more than one answer). From the responses given, clothes and shoes accounted for 39%, food and groceries for 36%, chemists' and medical goods 16%, confectionery/tobacco/newspapers and magazines 16%, leisure and luxury goods 15%, household textiles and soft furnishings 10%, hardware DIY goods and decorating supplies, tools and garden products 9%, audio visual equipment 4%, furniture, carpets and other floor coverings 2% and household appliances 2%. The high proportion buying food reflects the attraction of ASDA, which despite the poor location and small size of its store is clearly operating linked trips with the main part of the town centre.

Expenditure

3.40 Question 7 asked respondents how much they had spent or intended to spend in the town centre on food, on the day of their visit. 61% of respondents stated that they would not spend anything. 22% of respondents would spend £10 and under, 7% would spend between £11 and £20, 10% of respondents would spend more than £20. The average spend on food from respondents was £20.57.

3.41 Question 8 asked respondents how much they have spent or intend to spend in the town centre on non-food goods on the day of their visit. 22% of respondents stated that they would not spend anything. 24% of respondents would spend £10 and under, 13% would spend between £11 and £20, 25% of respondents would spend between £21 and £50. 16% of respondents would spend more than £50. The average spend on non-food items from respondents was £44.18.

3.42 These responses indicate that of those people shopping in the centre there was much greater importance attached to the town centre for non-food shopping than for food shopping. Also forming a significant proportion of respondents were those, which did not spend anything. These people were not using the town centre for shopping at all.

3.43 These figures should be treated with some caution because of the nature of such a question inviting a snap response rather than a carefully considered one. These responses are not sufficiently reliable to be used for retail capacity modelling, and have not been used for that purpose.

Frequency of Visit to Hemel Hempstead Town Centre

3.44 Question 9 asked how often respondents visit Hemel Hempstead town centre for food shopping, non-food shopping, financial or personal services, leisure facilities and visiting pubs, cafés and restaurants. Of those who did visit Hemel Hempstead for food shopping, 24% of all respondents indicated they came to Hemel Hempstead at least once a week. 15% of all respondents came more frequently, either every day or 2 –3 times a week. A further 8% came less regularly, either once a fortnight or once a month; with the remaining 52% coming less often or never to undertake food shopping in the centre.

3.45 In terms of other attractions, using once a week or more often as the cut off, 54% of all respondents visited at least once a week for non-food shopping, whilst 36% visited at least once a week for financial or personal services. Significantly less people visited regularly for entertainment purposes; with only 8% of respondents indicating they visited Hemel Hempstead town centre at least once a week for leisure facilities, whilst 18% of respondents visited pubs/cafés and restaurants in the centre at least once a week.

Things Liked About Hemel Hempstead Town Centre for Shopping or Services

3.46 Respondents were asked without prompting (Question 10) what they liked about Hemel Hempstead town centre for shopping or services (respondents could give more than one answer). 19% of all respondents said they liked the non-food shops. 11% of respondents stated they liked the Marlowes Shopping Centre, 17% liked the traffic free pedestrian area, 9% liked the fact it was easy to park and 8% liked the clean streets. The main reason people liked Hemel Hempstead town centre was that it is easy to get to from home (31%).

3.47 Other aspects liked about the town centre included the fact that it was a compact town centre (6%), the attractive environment (7%), and the good range of cafes and restaurants (5%). Unfortunately however, the highest proportion of all respondents, 24%, indicated that they liked nothing or very little about Hemel Hempstead town centre. This is a fairly high proportion of respondents who are dissatisfied with the town centre or apathetic about it; reinforcing the above result that they visit the centre out of necessity, due to proximity factors, rather than through its inherent attractions.

3.48 When asked to specify which particular shops and services the respondents who answered liked, 27% stated that they liked the Pound Shop, 20% liked Primark, 20% liked Marks and Spencer and 20% of respondents stated various shops. Ann Harvey and (curiously since it is not yet open) the new Debenhams store was also mentioned.

Things Disliked About Hemel Hempstead Town Centre for Shopping or Services

3.49 More encouraging is the result that 27% of all respondents could think of nothing or very little which they disliked about the town centre (question 11), which is 3% more of all respondents than those who could think of nothing they liked about the town centre (question 10). The main unprompted dislikes (respondents could give more than one answer) were the poor range of shops (23% of all respondents), and the poor market (18%). Other criticisms related to expensive car parking (13%), the streets being dirty (10%), and the environment being unattractive (9%).

Use of the Town Centre in the Evening

3.50 The survey was undertaken by interviewing town centre users during the day. As such, it was a survey with a strong daytime bias. It did not interview people who only go to the town centre in the evening so does not provide the complete picture of the evening economy. However, daytime users of the centre were asked about their use of the town centre in the evening.

3.51 In terms of frequency of visit, 74% of all respondents said that they never visit Hemel Hempstead town centre during the evening. This indicates that the vast majority of people who shop in Hemel Hempstead during the day do not want to visit Hemel Hempstead town centre in the evening. 7% of all respondents indicated that they visited the centre in the evening at least once a week. A further 7% visited the centre in the evening but less often.

3.52 Those 106 respondents who did visit the centre in the evening were asked their main reasons for doing so. Pubs and bars were mentioned by 56% of such respondents, cafés and restaurants by 38%, nightclubs by 11% and the library by 2%. A further 2% indicated they visited the centre for work and 4% indicated they visited it to shop in the evening. The remaining respondents gave a wider range of reasons including attending meetings and going to a cash point.

3.53 The same group of 106 respondents were asked what they liked about the town centre in the evening (question 14). Of those respondents 43% stated that there were good cafes, restaurants and bars. However 26% indicated they liked nothing or very little about the town centre in the evening. Further positive comments included that 11% stated it was easy to get to by car and 9% stated that there was good car parking. 6% of respondents stated that there was good street lighting and 6% stated that there was good security.

3.54 The same respondents were also asked what they disliked about the town centre in the evening. 36% of respondents stated that they disliked nothing or very little; which was 10% higher than those who liked nothing or very little. 12% stated that they disliked the fact there was no cinema, 11% stated that there were poor restaurants and cafes. 10% of respondents said that there were poor leisure, entertainment and cultural facilities. 16% stated that there was evidence of vandalism and graffiti. 8% stated that the town is too quiet and closes too early. Other dislikes included young people drinking on the street, broken glass on the pavement and the lack of night-clubs.

3.55 The scores for the tables below are worked out from the on-street interview survey. Each respondent was asked to rank each aspect of the town centre. The ranking ranged from Very poor (1) to very good (5). The score which was most frequent provided the average included in the table.

Table 3.9: Evening ratings for Hemel Hempstead Town Centre

Topic	Average Score
Car Parking	4
Bus services	4
Safety and security	4
Range of evening attractions	2
Quality of evening attractions	3
Cleanliness of Streets	4
Attractiveness of town centre	3

Source: Donaldsons, 2005

3.56 Table 3.9 shows that Hemel Hempstead scores well across most aspects of environmental rating in the evenings, scoring 'good' in a majority of areas. The main weakness highlighted here is the perceived lack of attractions within the centre in the evening.

3.57 Similarly, all respondents were asked to rate the same aspects of the town centre in the daytime, using the same scoring system. The results for all respondents are set out in Table 3.10.

Table 3.10: Daytime ratings for Hemel Hempstead Town Centre

Topic	Average Score
Car Parking	4
Bus services	4
Safety and security	4
Range of shops	4
The Market	1
Range of services	4
Cleanliness of streets	4
Attractiveness of town centre	4

Source: Donaldsons, 2005

3.58 Daytime ratings for Hemel Hempstead are of a high standard with only one aspect being marked poor, again substantiating other findings in this report which have also identified the area around the market as being well below the overall environmental standard of the town centre.

<u>Mode of Travel</u>

3.59 Respondents were asked how they had travelled to the town centre on the day of interview. 62% of all respondents had travelled by car to the centre, 18% had walked, 16% had arrived by bus, and 2% had come by taxi. The remaining 2% travelled by cycle, train or motorcycle. These results highlight the large number of people who travel to Hemel Hempstead town centre by car.

<u>Profile of Respondents</u>

3.60 The age profile of respondents was fairly evenly split between the age groups. 19% of respondents were aged 36 – 45 years, 19% were aged 46 – 55 years. 17% were aged 26 – 35, 16% were aged 56 – 65 years, 13% of respondents were aged 65 years or over, 10% were aged 19 – 25 years and 5% were aged 0 – 18 years.

3.61 A majority of the people surveyed lived in households where a high proportion of people of working age were in either full-time or part-time employment. When questioned on car ownership, 42% of respondents owned one car, 28% of respondents owned two cars and only 19% of respondents didn't own any.

Survey of businesses

3.62 We commissioned a business survey of businesses in the town centre, this gives some indication as to how existing businesses in the area perceive Hemel Hempstead town centre. We sent out 225 questionnaires and had a response rate of 17% (38 businesses). The responses covered the spectrum of businesses operating within the town centre and included service providers, comparison and convenience goods retailers. A copy of the survey form conducted and a complete set of results is to be found in Appendix 3.

3.63 The majority of firms responding employed less than 20 people, whilst 34% of respondents employed between two and five people. This is to be expected from the size and type of retailer representation in the town centre. Many of the respondents were from comparison goods retailers who tend to employ fewer staff. The number of people employed has remained steady in most cases, although nine respondents stated that the number of employees has decreased in the last five years. This could be due to technological advances, decreasing the need for staff, or it could be a sign that some businesses are making cut backs on their overheads as they are struggling to stay competitive.

3.64 The majority of businesses have been at their current address for over two years. Only three businesses have been there between six months and one year. Further, 45% of respondents described their business trading as steady; but 32%, which is a significant proportion of respondents, stated that their business was declining. In regard to future plans, 61% of respondents are planning to stay the same with no plans to expand or relocate; those that are planning to relocate are mainly relocating to the new Riverside Centre.

3.65 The main advantages, which were highlighted by businesses in the survey of Hemel Hempstead, included that it is an accessible town with a large and affluent catchment area. Further, the town centre is perceived as being clean and tidy. Weaknesses that were stated by businesses included lack of parking and it being difficult to recruit staff. High levels of vacancy and strong competition from other centres were also stated as a weakness. The physical aspects mentioned included that Hemel Hempstead had poor architectural quality and lacks uniqueness.

3.66 Problems, which were experienced by businesses in the town, included that there was a lack of convenient customer parking, there was low footfall in some retail areas of the town and there tended to be poor trading on Sundays and Thursday evenings. Further problems included that there was evidence of vandalism and petty crime and there were not enough visitors from outside Hemel Hempstead.

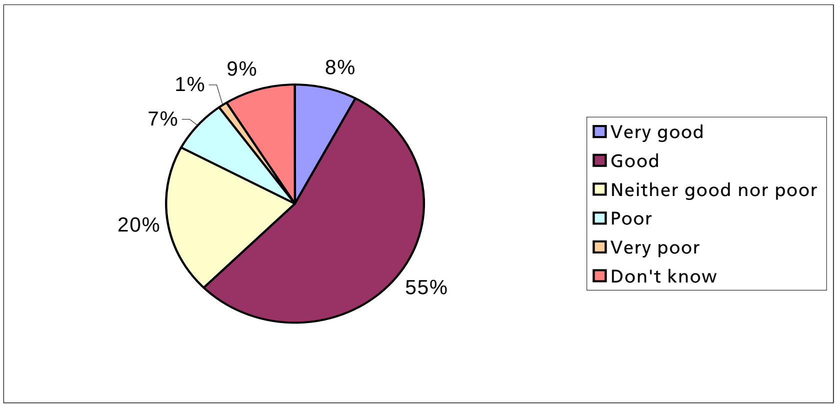
3.67 Suggested improvements to the centre included to bring more entertainment into the area as well as to expand the leisure and retail offer. Physical improvements that were suggested included improving the market, improving the pavements and introducing more colour into the centre.

Crime and Security

3.68 As indicated in PPS6, the perception of safety and occurrence of crime are useful indicators for assessing the health of town centres. Our assessment of the state of the environment in Hemel Hempstead town centre revealed that there were some secondary areas of the centre that were less well lit, in particular between the car parks and the main shopping areas. However, CCTV and police presence were all noted within the main pedestrianised areas; and bus stops were placed in well overlooked locations that related well to the town centre.

3.69 From the on-street shopper survey graph 3.2 illustrates the perceptions of people interviewed regarding safety and security in Hemel Hempstead town centre during the day:

Graph 3.2: Perceptions of Safety and Security during the Day



Source: On- Street Shopper Survey, Donaldsons, 2005

3.70 62% of people surveyed thought that security in Hemel Hempstead was good or very good. Only 8% stated that it was poor or very poor. In the evening this proportion falls significantly with 38% of those surveyed describing the security level as good or very good and 34% describing it as poor or very poor.

Environmental Quality

3.71 In order to assess the state of the environment, we undertook a survey of the three main shopping areas of the town centre, Marlowes, Bridge Street and the market area. Table 3.11 summarises our assessment of Hemel Hempstead town centre environment. Ten environmental features were assessed on each street in the main area of the centre; and these features were rated on a scale of one to five, where one is very poor and five is very good. On this basis, three represents a neutral score. The average scores for each aspect of the centre reviewed were as follows: -

Table 3.11: Environmental Quality Survey Results

Topic	Average Score
Condition of carriageway and pedestrian surface, street lights, bollards, signs, traffic signs and signals	4
Seats/Planters/Hanging baskets/ Litter bins/ water features/ public art	3.25
Public facilities, telephones, bus stops, shelters, public toilets	3.25
Graffiti, fly posting, vandalism	3.25
Market stalls and street traders	2
Barriers to movement	3.75
Cycle parking	2.5
Maintenance and repair of buildings, shopfronts and canopies	2
Personal security and police presence	2.75
Wheelchair access, facilities for the partially sighted	3.5

Source: Donaldsons 2005

3.72 Table 3.11 indicates the overall picture of the environment throughout the central area of the town centre. The scoring reflects the care the Local Authority has taken to make the centre environment comfortable for shoppers, with most topic scores recorded as 'fair'. These reflect findings elsewhere in this study, which highlight the positive impact of the pedestrian areas in allowing shoppers to move, with relative ease, through the centre. The most prominent weaknesses are the condition of the market and the condition of the shop frontages. The weakness of the market is corroborated by findings from the on-street interview survey. A more detailed results table for each area and a copy of the environmental quality survey proforma can be found at Appendix 4.

Marlowes

3.73 For the purposes of the survey Marlowes was split into Marlowes north of Bridge Street and Marlowes south of Bridge Street. Marlowes south scored the highest out of all the streets surveyed within Hemel Hempstead. The condition of the paved surface is even and the street furniture is in good condition. Marlowes south also scored highly with regard to the level of disability access, since there were few obstacles along the street and wheelchair access was apparent in all of the shops. The street has CCTV fitted, and at the time of survey there was a police presence as well as a high level of pedestrian flow that adds to a sense of security. The streets were clean and at the time of visiting active street cleaning was being undertaken. There was little evidence of graffiti and vandalism. Marlowes south has an abundance of street furniture and some major works of public art including the Residents Rainbow, Waterplay and the Town Map. The cleanliness, sense of security and the amount of public art add to a sense of place and a good overall impression of environmental quality.

3.74 There were some weaknesses of Marlowes south, the most significant being the general appearance of shop fronts and canopies. Some of the frontages were in a poor state of repair or needed repainting. The need for frontages to look attractive is made more important by the fact that Marlowes south scores very well in most other sectors. A further weakness is the lack of public facilities in this part of the town centre. There were very few telephone boxes and no toilets, the Marlowes centre provides public toilets.

3.75 The environmental quality of Marlowes north does not score as highly as Marlowes south. A key strength is that the bins, seats and hanging baskets are in good order. The amount and variety of street furniture is good and is well placed. There is also good disability access and the condition of the carriageway is of high quality. This area scores slightly less well with regard to the presence of public art, as well as ease of movement, facilities for cyclists and the level of personal security.

3.76 The main weaknesses of this street are that there is an increase in the amount of litter and graffiti. The buildings are in need of a facelift, and are less well maintained than in other areas. Generally the sense of security is less, as this part is not as busy and displays a higher level of neglect.

<u>Bridge Street</u>

3.77 Bridge Street scored fairly highly in the survey. The carriageway was in good condition as was the street furniture. There are litterbins, seats and hanging baskets, which are well maintained. Bridge Street is on a bus route, the bus stations are in reasonably good order for its age and limited facilities, with seating and covered waiting areas. The whole street was litter free, though there was some graffiti. There was also good ease of movement along this street, with dropped curbs for wheelchair access and few obstacles.

3.78 The main weakness was the lack of bicycle facilities. There were no bicycle racks or designated cycle lanes along this street; although it is designated as a bicycle precinct, cyclists are not separated from the buses and taxis that are also permitted to use the street. The canopies and shop fronts need some attention to improve the facades. There is no CCTV coverage; however being just off Marlowes and having bus stops located in this area, it does feel fairly secure.

<u>The Market Area</u>

3.79 The market area within Hemel Hempstead is by far the weakest with regard to environmental quality. The buildings look tired and are in need of maintenance, especially the market canopy that forms a prominent feature when the market is not trading. The level of security is also very low, with no surveillance; and there are dark areas in and around the Market Square. It is also a very quiet area when the market is not operating. There are no planters, seats, public art or water features. Despite the fact that this area has a low environmental score it does have potential to be developed into attractive civic amenity space on non-market days. As we comment in section 10, it also has potential for redevelopment in the long term.

3.80 Generally the retail areas in Hemel Hempstead are well kept and clean, and the street furniture is well maintained. The greatest weakness is the state of the shop frontages, many of which need to be improved. The market area could be significantly improved and currently lets down the overall very good environmental quality of the town centre.

Summary

3.81 Hemel Hempstead town centre has below national average representation of convenience and comparison goods units and an above average number of service units. This indicates a lack of sufficient retailers to ensure a high level of expenditure retention, but conversely, the importance of services to the town centre. The town centre has a number of multiple retailers, however only has 65% of the top twenty retailers, which for a centre of its size is somewhat low. The main foodstores within the town centre are Asda, Iceland, a Marks and Spencer foodhall, and an independent discount store. It is recognised however that with the opening of the Riverside Centre in the near future, the range of retail attractions will be greatly strengthened.

3.82 The town centre has a very low number of vacant units, which are scattered throughout the town centre. Prime retail rents have remained static over the past ten years. Investment yields have crept up over the last few years reflecting a falling expectation of future rental growth. However a more positive conclusion can be reached by analysing the level of retailer requirements. The level of retailers wishing to move into the town is healthy, with a mix of DIY stores, clothing retailers, electrical stores and A3 operators, illustrating that Hemel Hempstead is seen as an attractive location by retailers.

3.83 Hemel Hempstead town centre is very accessible by a choice of means of transport including car, bus and to a lesser extent, train. The on-street shopper survey indicated that a high proportion of shoppers came to Hemel Hempstead because it was convenient and accessible rather than because of the centre's existing attractions. With regard to car parking, most of the town centre car parks are in a reasonably good condition. However from our survey, signage to car parking from main roads could be improved.

3.84 The state of the town centre environment is fair; and the general cleanliness and level of public art reflects the successful efforts of the Council in improving the area. However, there are some significant weaknesses. Our visits to the centre have shown that the town centre environment would be improved through refurbishment of some retail units and fascias. The market area could also be greatly improved, an opinion which is supported by the results of the on-street shopper survey. The on-street shopper survey also emphasised the fact that Hemel Hempstead is losing out as a destination shopping centre as most people stated they went there mainly because it was convenient, rather than because of its attractions. From the information available with regard to security the overall picture is positive. From the on-street shopper survey, a high proportion of people felt secure in the town centre during the day. However, fewer users felt as secure in the evening.

3.85 From the businesses surveyed, there was a slightly more negative attitude towards the town centre. A high proportion of businesses are not expecting to expand. This, coupled with the fact that very few respondents were from new businesses, suggests that business opportunities and business confidence are somewhat lacking within Hemel Hempstead. This situation is likely to change with the completion of the Riverside Centre. From the survey it was evident that many retailers are waiting to assess the impact of the Riverside Centre on the town centre before they make any long term future plans.

3.86 Overall, we conclude that Hemel Hempstead town centre as currently trading is reasonably vital and viable, although lacks sufficient shops and stores to be certain of retaining its position in the retail hierarchy in the long term. The new Riverside Centre will remedy this deficiency, and confirm Hemel Hempstead's role as that of an important town centre for the foreseeable future.

4 Berkhamsted Town Centre

4.1 Berkhamsted town centre contains 159 retail and service units. The town has a traditional High Street running from north-west to south-east, containing a mixture of independent stores and some multiples. A large Waitrose store anchors the north west end of the centre and is situated behind the main High Street. A Tesco Metro store anchors the other end of the street. High Street is not pedestrianised, but there are four pedestrian crossings and traffic calming measures. There is no enclosed shopping centre in the town centre, which perhaps helps to retain its character and charm. A summary of the main 'areas' of the centre is included in Table 4.1.

Table 4.1: Summary of main shopping areas in Berkhamsted Town Centre

Street	Description
High Street	One long main street running from North West to South East anchored by Waitrose and Tesco Metro
Lower Kings Road	Secondary frontages near the entrance to Waitrose car park.

Source: Donaldsons, 2005

Diversity of Uses

4.2 Table 4.2 sets out the occupancy of these units in terms of the retail categories for comparison, convenience, service and vacant units. This is set against the national average for town centres to provide a comparison. Table 4.2 demonstrates that the number of comparison goods retail units in Berkhamsted in November 2004 was below the national average. The number of convenience units is also below the national average but to a lesser degree. The number of service units is significantly above the national average, with a very strong degree of variance (27%). This indicates the more limited retail role of the centre, and its greater importance for services (since service businesses substantially outnumber retail shops).

Table 4.2: Retail and services provision in Berkhamsted town centre by number of units

Type	No of Units	% of Total	National Average %	Variance %
Comparison	56	35	48	-13
Convenience	7	4	9	-5
Service	91	57	30	+27
Vacant	5	3	11	-8
Total	159			

Source: Experian Goad, November 2004

Notes: Percentages do not always sum to 100% because of rounding.

4.3 Table 4.2 clearly shows that there is a large under-representation of comparison goods floorspace in Berkhamsted town centre and a large over representation of service floorspace compared with the national average. This again indicates that Berkhamsted fulfils an important service centre role.

Table 4.2: Retail and Service Floorspace in Berkhamsted Town Centre

Type	Sq m	% Floorspace in Town Centre	% floorspace UK	Varience %
Comparison	6,688	25	53	-28
Convenience	4,604	17	17	0
Service	14,369	54	20	34
Vacant	921	4	8	-4
Total	26,561			

Source: Experian Goad, November 2004

Notes: Percentages do not always sum to 100% because of rounding.

4.4 There are several charity shops on the main shopping street, together with small independent shops including ladies wear, a garden centre, shoe shops and antique shops. In terms of the services sector, there are a number of A2 professional and financial services present amongst the comparison goods retailers, including Lloyds TSB, Nat West, Britannia and Barclays. In addition, a number of fast food outlets, cafes and restaurants, bars and public houses, estate agents, accountants and undertakers are also located in the centre. Waitrose situated behind the High Street and a Tesco Metro supermarket located on the High Street provide the main food shopping offer. There is also a Co-op, Threshers and Greggs bakers.

4.5 The diversity of uses in Berkhamsted's town centre is supplemented by a number of important buildings including a large church, a distinctive town hall built in a gothic style, a post office, local Council offices, Fitness First Gym and a community centre. Berkhamsted Collegiate School is also located in the town centre, on the north side of the High Street. There are a number of office buildings just off High Street, as well as some residential property. The presence of residential property and offices ensures that there are people using the town centre throughout the day.

Retailer representation

4.6 A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can enhance the appeal of a centre to shoppers. In November 2004, 45 of the 159 units in Berkhamsted were occupied by multiple retailers (28%). This figure is below the national average of 34%, which is to be expected in view of the town centres small size. However, there is an attractive presence of independent retailers. The main multiple retailers within Berkhamsted are situated along High Street and are fairly evenly dispersed between the numerous non-multiples.

4.7 According to Focus, Boots and WHSmith are represented within Berkhamsted town centre. These are the only two top 20 retailers within the centre. The definition of top 20 retailers is that these are the top 20 comparison goods multiples ranked by ORC's (international research company) forecast of average town centre sales for individual retailers within Great Britain.

4.8 Retailer demand to locate in a town centre provides a good indication of the health of a town centre. Table 4.3 highlights the current requirements from comparison goods retailers and service businesses for Berkhamsted. The minimum figures are the totals of each company's minimum, and the maximum the totals of their maxima. Altogether a total of 18 retailers and service businesses have expressed a demand for floorspace within Berkhamsted town centre. We consider this is encouraging for a small town centre of this type. It suggests that there will be retailer support for any appropriate development opportunities which become available.

Table 4.3: Retailer Requirements Within Berkhamsted

	Comparison	Service	Total
No. of requirements	10	8	18
Sq m Minimum	1,795	1,437	3,232
Sq m Maximum	3,515	3,046	6,561
Sq ft Minimum	19,321	15,468	34,789
Sq ft Maximum	37,835	32,787	70,622

Source: Focus, 2005

4.9 Convenience goods retailers such as the main supermarket operators and small independent convenience store retailers do not usually post their requirements on databases such as Focus. We have therefore undertaken a postal survey (with follow-up by telephone) of all the main food retailers to assess their interest in taking new stores in Dacorum. The results of this survey are set out in Section 8 of this report. These results also highlight a small number of specialist convenience goods providers who have a specific requirement in Berkhamsted.

Shopping Rents

4.10 There is little published information on retail rents in Berkhamsted. At time of writing there was only one retail unit for sale according to Egi; Marlowe House, 346 High street, Berkhamsted. The property extends to 376 sq m and is for sale for £706,000. Table 4.4 details two leasehold interests which are currently being marketed.

Table 4.4: Available Leaseholds

Address	Size	£ pa	£/ sq m	Date	Comments
168, High Street, Berkhamsted	1,045 – 2,803	£36,000	97 - 260	24th Feb 2005	Restaurant/café; Leasehold
280, High Street, Berkhamsted	520	£18,500	48	14th March 2005	Retail unit; Leasehold

Source: Egi, 2005

4.11 Because it is a very small town, very few transactions have taken place recently in Berkhamsted from which rental values can be proven. There is also very little historic information available for the area, which could indicate trends in shop rental values.

Commercial Yields

4.12 Research by the VOA has tracked shopping centre yields from 1994 – 2004. From the data, Berkhamsted has held its yields since 1995 at 8%. There is very little other information on yields within Berkhamsted. This indicates a limited but stable property investment market in the town centre. The fairly high yield of 8% realistically values the limited rental growth prospects in this small town centre.

Vacant Retail Property

4.13 In November 2003, there was approximately 921 sq m of vacant floorspace within Berkhamsted; which equates to 3.5% of the total floorspace, and was lower than the UK average of 8% at the same date. This low vacancy rate is an encouraging sign that Berkhamsted is popular with businesses.

Pedestrian Flows

4.14 There is no up to date information on pedestrian flow counts within Berkhamsted which would be of use to this study. This is because the town centre is too small to have been included in the national programmes of town centre flowcounts by PMRS and other agencies. However, on the day of our inspection (Tuesday lunchtime) Berkhamsted was busy, with good levels of pedestrian activity throughout the town centre. Pedestrian flows were higher in the central part of High street than at either end, which is to be expected.

Accessibility

4.15 Berkhamsted town centre is located north of Amersham and east of Aylesbury and west of Hemel Hempstead. It is situated approximately four miles from junction 20 of the M25 along the A41. Berkhamsted is on a main train line, the same line as Hemel Hempstead, ie the main line between London Euston and Rugby. Trains run from London about every 20 minutes, with a journey time of around 35 minutes.

There is a choice of bus services serving Berkhamsted town centre including the following routes:-

- 30 Hemel hempstead – Water End – Potten End – Great Gaddesden – Hudnall – Little Gaddesden – Ringshall – Northchurcg – Aldbury – Tring – Dudswell – Berkhamsted
- 31 Hemel Hempstead – Watre End – Great Gaddesden- Nettleden – Little Gadesden – Ringshall – northchurch – Aldbury – Tring – Northchurch – Berkhamsted
- 322 Watford – Kings Langley – Hemel Hempstead – Berkhamsted – Northchurch

- 327 Hemel Hempstead - Great Gaddesden - Hudnall - Little Gaddesden - Ringshall - Aldbury - Tring - Marsworth - Pitstone - Ivinghoe - Dunstable - Dunstable Downs - Whipsnade - Dagnall - Northchurch - Berkhamsted - Hemel Hempstead
- 353 Slough - Stoke Poges - Gerrards Cross - Chalford St Peters - Chalfont St Giles - Amersham - Chesham - Berkhamsted
- 500 Aylesbury - Tring - Berkhamsted - Hemel Hempstead - Kings Langley - Watford
- 607 Tring - Dudswell - Northchurch - Berkhamsted - Hemel Hempstead - Apsley - Kings Langley - Hunton Bridge - Watford
- 865 Dudswell - Northchurch - Berkhamsted
- 873 Wigginton - Tring - Dudswell - Northchurch - Berkhamsted

4.16 There are a number of bus stops along High Street in Berkhamsted including one outside the Town Hall. On our visit to Berkhamsted town centre, we did not see any evidence of real-time bus information systems in use.

Parking

4.17 Berkhamsted town centre has five car parks plus some on-street parking spaces available for shoppers. Town centre car parks predominantly provide short-term spaces. In total there are approximately 78 Long Stay parking spaces and 384 short stay spaces. The car parks (all surface) are centrally located with a high concentration around the Waitrose store. All of the main car parks within Berkhamsted have been assessed for quality. We used a proforma to assess each car park individually. A copy of the survey proforma and a complete table of results are included in Appendix 1.

4.18 The main strengths of the car parks surveyed were the high level of cleanliness and the quality of the car park surfaces. The principle car parks had very little litter and graffiti and all scored good or excellent in this respect. All the car parks were tarmacced and were in good condition, with the exception of Water Lane, which had some surface cracking and potholes. A further strength was that four of the five car parks surveyed were well lit, Canal Fields being the exception.

4.19 The main weaknesses of the car parks were access and signage. Access was a particular weakness, with two of the car parks having very narrow access roads (although not entirely surprising given the historical nature of the centre). This was particularly evident in Canal Fields. Access to on-street parking along High Street was difficult due to the amount of traffic flowing through the centre of the town. Signage to available car parking was poor from High Street, and it appeared that motorists tend to stumble upon the car parks as opposed to being clearly directed to them.

Customer Views and Behaviour

4.20 In accordance with the project brief, we designed and commissioned an on-street interview survey of shoppers and other town centre users. This was based on a random sample of 250 interviews, at locations along High Street; with interviewing conducted in May 2005 on a consecutive Thursday, Friday and Saturday between 9.00am and 6.00 pm. The questionnaire was designed by Donaldsons following consultation with Dacorum Borough Council. 93 interviews were conducted on Thursday, 57 on Friday and 100 on Saturday. Appendix 2 includes the full results of the survey as well as a copy of the questionnaire used, together with the results of similar surveys undertaken in Hemel Hempstead and Tring.

Purpose of Visit to Berkhamsted Town Centre

4.21 In question three, respondents were asked the main purpose of their visit to Berkhamsted town centre on the day of the interview. 22% of all respondents stated that they were doing non-food shopping and 32% food shopping. 8% of all respondents indicated that they were using the centre's financial services, 7% stated that they work in or near the town centre and 7% were in the centre to use other services. Other reasons stated for visits were leisure purposes, meeting friends, for business, visiting restaurants or shopping in the market.

4.22 In terms of secondary purposes for visiting, 41% of respondents stated that they were there for nothing else other than their primary reason. Of those people that had a secondary reason, food shopping and non-food shopping were the most mentioned activities. However, 6% of all respondents indicated that their secondary reason was to visit the financial services, 6% stated that their secondary reason was to visit the market and 5% were there to visit restaurants.

Reasons for Choice of Berkhamsted for Shopping or Services

4.23 Question five asked respondents why they had chosen to come to Berkhamsted town centre on that day for shopping and services. 81% of all respondents said it was because it was close to home, close to work or close to friends or relatives. This indicates that the majority of respondents were visiting the centre because its location was convenient to them, ie. because of proximity factors. The remaining 19% came to Berkhamsted due to attraction factors, such as the 1% of all respondents who indicated they came to Berkhamsted to visit the Waitrose, 2% visited due to the range of shops and 3% were visiting on business. The remaining 13% visited Berkhamsted for a wide variety of different reasons, such as collecting their car from the garage and coming to see a music group.

4.24 When asked to specify which particular shop/service they intended to use, 47% of respondents who answered stated that they were going to the bank, 12% of respondents were going to make use of various shops and services and 12% of people were going to visit the hairdresser. Other shops and services particularly mentioned included going for a medical appointment, visiting Tesco, Boots and Laura Ashley.

Goods Purchased

4.25 Question six asked what respondents had bought or expected to buy in Berkhamsted town centre on that day (respondents could give more than one answer). From the responses given, groceries accounted for 59%, confectionery/tobacco/newspapers and magazines 17%, chemists and medical goods 13%, leisure and luxury goods 12%, clothes and shoes accounted for 8%, hardware DIY goods and decorating supplies 3%, tools and garden products 3%, audio visual equipment 3% and household textiles and soft furnishings 0.8%, Therefore, a large number of respondents were shopping in Berkhamsted for convenience goods, reflecting the presence of the modern Waitrose store (in particular).

Expenditure

4.26 Question seven asks respondents how much they have spent or intend to spend in the town centre on food on the day of their visit. 41% of respondents stated that they would not spend anything. 29% of respondents would spend £10 and under, 10% would spend between £11 and £20, 20% of respondents would spend more than £20. The average spend on food from respondents is slightly higher than that spent in Hemel Hempstead being £21.13. This may reflect higher incomes in the town, and the presence of Waitrose (which whilst high quality, is not known as a low price food store).

4.27 Question eight asks respondents how much they have spent or intend to spend in the town centre on non-food goods on the day of their visit. 38% of respondents stated that they would not spend anything. 32% of respondents would spend £10 and under, 11% would spend between £11 and £20, 13% of respondents would spend between £21 and £50, 5% of respondents would spend more than £50 and 1% didn't know how much they would spend. The average spend on non-food items from respondents is £25.11.

4.28 As with the results for Hemel Hempstead, these average expenditures should be treated with some caution. However, they do confirm the limited non-food shopping role of Berkhamsted town centre.

Frequency of Visit to Berkhamsted Town Centre

4.29 Question nine asked how often respondents visit Berkhamsted town centre for food shopping, non-food shopping, financial or personal services, leisure facilities and visiting pubs, cafés and restaurants. Of those who did visit Berkhamsted for food shopping, 24% of all respondents indicated they came to Berkhamsted at least once a week. 51% of all respondents came more frequently, either every day or two to three times a week. A further 4% came less regularly, either once a fortnight or once a month; with the remaining 20% coming less often or never to undertake food shopping in the centre.

4.30 In terms of other attractions, using once a week or more often as the cut off, 67% of all respondents visited at least once a week for non-food shopping, whilst 46% visited at least once a week for financial or personal services. Significantly less people visited regularly for entertainment purposes; with only 25% of respondents indicating they visited Berkhamsted at least once a week for leisure facilities, whilst 34% of respondents visited pubs/cafés and restaurants in the centre at least once a week.

Things Liked About Berkhamsted Town Centre for Shopping or Services

4.31 Respondents were asked without prompting (Question 10) what they liked about Berkhamsted town centre for shopping or services (respondents could give more than one answer). 19% of all respondents said that they liked the non-food shops. 27% of respondents stated they liked the food shops, 18% of respondents liked the market. 19% of respondents liked the good restaurants and cafes. 20% of respondents said that they liked the Waitrose store. 28% of respondents liked the attractive environment. 21% of respondents liked the fact that it was easy to get to from home. Encouragingly only 11% of respondents stated that they liked nothing or very little. Other aspects which respondents liked about the town included that it was a compact town centre and it is a friendly town with a good atmosphere.

4.32 When asked to specify which particular shops and services they liked, 25% of respondents who answered stated that they liked various stores within Berkhamsted. 13% liked the new bookshop (Ottakar's), 13% of respondents stated that they liked the WHSmith within the town. Boots, and Cooks Delight were also specifically mentioned.

Things Disliked About Berkhamsted Town Centre for Shopping or Services

4.33 The fact that Berkhamsted is regarded positively by a large proportion of respondents is further emphasised by the fact that 38% of respondents could think of nothing or very little which they disliked about the town centre (question 11). Thus there is a strong positive balance of likes over dislikes. The main unprompted dislikes (respondents could give more than one answer) were the amount of traffic congestion (14%) the poor range of shops (10%), the difficulty with parking near to the shops (17%) and the fact that car parking is too expensive (12%). Other aspects mentioned by respondents included dirty and poorly maintained streets; and the lack of provision of seats, litter bins and public toilets.

Use of the Town Centre in the Evening

4.34 The survey was undertaken by interviewing town centre users during the day. As such, it was a survey with a strong daytime bias. It did not interview people who only go to the town centre in the evening, so does not provide the complete picture of the evening economy. However, daytime users of the centre were asked about their use of the town centre in the evening.

4.35 In terms of frequency of visit, 48% of all respondents said that they never visit Berkhamsted town centre during the evening. Thus almost half of people who shop in Berkhamsted during the day do not visit Berkhamsted town centre in the evening. 21% of all respondents indicated that they visit the centre in the evening at least once a week. A further 30% visit the centre in the evening, but less often than once a week.

4.36 Those 129 respondents who did visit the centre in the evening were asked their main reasons for visiting the town centre. Pubs and bars were mentioned by 41% of such respondents, cafés and restaurants by 67%, the sports centre was mentioned by 4% and nightclubs by 0.8%. A further 16% indicated they visit the centre to go to the cinema and 2% stated that they meet friends in the evening in Berkhamsted.

4.37 The same group of 129 respondents was also asked what they liked about the town centre in the evening (question 14). Of those respondents, 71% stated that there were good cafes, restaurants and bars. 15% of respondents stated that it was an attractive environment, 11% of respondents stated that it was a secure environment, and 10% stated that it was easy to get to by car. Only 6% of respondents stated that they liked nothing or very little about Berkhamsted town centre in the evening.

4.38 The same respondents were also asked what they disliked about the town centre in the evening. A very positive 60% of respondents stated that they disliked nothing or very little about the centre. 12% stated that they disliked young people drinking on the streets, whilst 6% of respondents stated that Berkhamsted feels unsafe in the evening. 6% of respondents also disliked the amount of vandalism. 5% disliked the fact that there are poor leisure, entertainment and cultural facilities. Other dislikes included dirty streets, difficulty with parking, not enough of a police presence and anti social behaviour.

4.39 Table 4.5 shows that Berkhamsted is viewed in a very positive way across all aspects surveyed, scoring either fair or good. From the results the 0 rating for bus services reflects an overwhelming 79% of respondents who did not know about the bus services available in the evening.

4.40 The scores for the tables below are worked out from the on-street interview survey. Each respondent was asked to rank each aspect of the town centre. The ranking ranged from Very poor (1) to very good (5). The score which was most frequent provided the average included in the table.

Table 4.5: Evening ratings for Berkhamsted Town Centre

Topic	Average Score
Car Parking	4
Bus services	0
Safety and security	4
Range of evening attractions	4
Quality of evening attractions	3
Cleanliness of Streets	3
Attractiveness of town centre	4

Source: Donaldsons, 2005

4.41 Similarly, all respondents were asked to rate the same aspects of the town centre in the daytime, using the same scoring system. The results for all respondents are set out in Table 4.6.

Table 4.6: Daytime ratings for Berkhamsted Town Centre

Topic	Average Score
Car Parking	4
Bus services	0
Safety and security	4
Range of shops	4
The Market	4
Range of services	4
Cleanliness of streets	4
Attractiveness of town centre	4

Source: Donaldsons 2005

4.42 Berkhamsted in the daytime has good ratings in almost all aspects, but again a majority of respondents didn't know about the bus services. The lack of a positive response about bus services indicates that most people travel to Berkhamsted by other means of transport, and could be ignorant of the bus service on offer.

Mode of Travel

4.43 Respondents were asked how they had travelled to the town centre on the day of interview. 54% of all respondents had travelled by car to the centre, 38% had walked, and only 4% had come by bus. The remaining 4% travelled by bicycle, train, taxi or motorcycle. These results highlight the large number of people who travel to Berkhamsted by car, and the extremely limited use of buses.

Profile of Respondents

4.44 15% of respondents were aged 65 years or over, 18% were aged 56 – 65 years, 19% were aged 46 – 55 years. 22% of respondents surveyed were aged 36 – 45 years, 14% were aged 26 – 35, 7% were aged 19 – 25 years and 6% were aged 0 – 18 years. A majority of respondents stated that at least one person who is of employable age within their household is in part time or full time employment. 5% of respondents stated that one person within their household was unemployed but was available for or seeking employment.

Survey of Businesses

4.45 The business survey gives some indication as to how existing businesses in the area perceive Berkhamsted town centre. We sent out 190 questionnaires and had a response rate of 19% (36 businesses). The responses covered the spectrum of businesses operating within the town centre and included service providers, and comparison and convenience goods retailers. The full results of this survey as well as a copy of the questionnaire sent out can be found at Appendix 3.

4.46 A majority of firms employed less than 20 people. 39% of respondents employed between five and ten people. A majority of businesses have employed the same number of staff over the last five years. However a significant proportion of businesses (28%) have increased the number of staff, and very few have decreased the number of people they employ.

4.47 A majority of respondents have been in the area for more than five years and a high proportion of these have been in Berkhamsted for more than ten years. 14% of respondents have been there for less than a year indicating that new businesses are still attracted to Berkhamsted as a business location. 67% of respondents described their business as steady and 22% described their business as growing, whilst only one respondent described their business as declining. In regard to future plans, 75% of respondents are planning to keep their businesses the same. 22% are planning to expand and only one respondent is planning to relocate.

4.48 From the survey a number of advantages to having a business located within Berkhamsted were identified including that there was a large and affluent catchment area and that the town is easily accessible. It was also stated that Berkhamsted had good attractions.

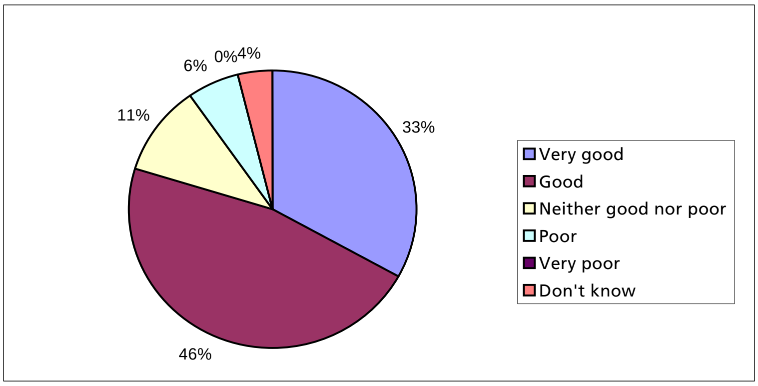
4.49 There weren't many weakness which were identified from the survey, the only two stated was the lack of parking and the lack of a variety of size of retail units. Problems experienced by retailers were also low in number and included evidence of vandalism and petty crime and not enough visitors coming in from outside the town.

4.50 A number of improvements were suggested to increase the prosperity and attractiveness of the town these included an initiative to encourage Sunday trading and that more entertainment should be introduced into the area. Physically it was suggested that traffic flow and parking measures should be reviewed, there should be an increase in pedestrianised areas and there should be more colour brought into the town.

Crime and Security

4.51 Our assessment of the state of the environment in Berkhamsted town centre revealed that some secondary streets, as well as car parks were less well lit than other areas. However, overall the town centre did have a safe ambience. This view can be corroborated by the results of the on-street shopper survey. From the on-street shopper survey, Graph 4.1 illustrates perceptions of those people interviewed of safety and security within Berkhamsted during the day:

Graph 4.1: Perceptions of Safety and Security in Berkhamsted town centre during the Day



Source: On-street Shopper Survey, Donaldsons, 2005

4.52 82% of people surveyed thought that security in Berkhamsted was good or very good. Only 3.2% stated that it was poor or very poor. In the evening this proportion falls slightly with 74% of those surveyed describing the security level as good or very good and 9% describing security as poor or very poor. These findings are clearly encouraging, and shows that there are no significant problems regarding perceptions of security.

Environmental Quality

4.53 In order to assess the state of the town centre environment, we undertook a survey of the main shopping areas within the town, High Street and Lower Kings Road. Table 4.7 summarises our assessment of the town centre environment within Berkhamsted. As with Hemel Hempstead, ten environmental features were assessed; and these features were rated on a scale of one to five, where one is very poor and five is very good. The average scores for each aspect of the centre reviewed were as follows: -

Table 4.2 Environmental Quality Survey Results

Topic	Average Score
Condition of carriageway and pedestrian surface, street lights, bollards, signs, traffic signs and signals	3.33
Seats/Planters/Hanging baskets/ Litter bins/ water features/ public art	3
Public facilities, telephones, bus stops, shelters, public toilets	2.6
Graffiti, fly posting, vandalism	4.6
Market stalls and street traders	N/a
Barriers to movement	3
Cycle parking	2
Maintenance and repair of buildings, shopfronts and canopies	3.33
Personal security and police presence	3.33
Wheelchair access, facilities for the partially sighted	3.33

Source: Donaldsons 2005

4.54 Table 4.7 indicates the overall picture of the environment throughout the central area of the town centre. As with Hemel Hempstead the scoring reflects the care the Local Authority has taken to make the centre environment comfortable for shoppers, with most area scores recorded as 'fair'. Particularly Berkhamsted scores highly with regard to the low level of graffiti, fly posting and vandalism. The two main weaknesses within the centre include the lack of public facilities and the lack of bicycle parking.

4.55 All the main shopping streets within Berkhamsted were surveyed and assessed for environmental quality. The proforma and results are found in Appendix 4. For the purposes of the survey, High street was split into High street East and High Street West.

<u>High Street</u>

4.56 High Street east (defined as all shops east of Lower Kings Road) has obtained the highest score for environmental quality within Berkhamsted. There was no evidence of litter or graffiti in this section. High Street east scored well for the level of disability access; as there are plenty of dropped kerbs for wheelchair users and tactile paving to assist the visually impaired. A high level of personal security was provided by the presence of the police and

CCTV. Shopfronts and buildings were overall in good condition, but a small block of frontages from 160 – 178 High Street could be improved.

4.57 The presence and condition of public facilities was good, with bus stops and telephones being in good order. High Street east has plenty of seats, planters and litterbins, however there was little evidence of public art. The condition of the carriageway was good with no temporary obstructions and few cracked paving slabs. Street furniture was well used and well maintained.

4.58 There are two main weaknesses picked up by the survey. First, pedestrian movement from east to west is relatively straightforward it can be difficult to cross High Street due to high volumes of traffic and only two pedestrian crossings in this section. Second, there are not enough facilities for cyclists. At the time of visiting, all the bicycle racks were being used and some bicycles were being chained to trees due to lack of provision of cycle racks. There are also no cycle lanes along High Street.

4.59 High Street west (defined as all shops to the west of Lower Kings Road) scores slightly lower than the eastern section. This is mainly due to a slight fall in the condition of the carriageway, which was more uneven with some evidence of cracking. There is also less street furniture present and fewer public facilities, although the pavement does narrow in this section, reducing the opportunity to provide more street furniture. As in the eastern section, there are few facilities for cyclists. High Street west did have a high level of disability access and a good level of personal security.

Lower Kings Road

4.60 Lower Kings Road had the lowest score of the streets surveyed in Berkhamsted. Lower Kings Road is a relatively minor street off High Street. One of the functions of this street is to provide an access road to Waitrose. Its main strength is the level of cleanliness and lack of graffiti. However the pavement is narrow, which impedes ease of movement. There were no dropped curbs for wheelchair users or tactile paving for the visually impaired. There was no sign of any form of security along this street, no public facilities or street furniture (owing to the narrow pavement), hence the poor environmental quality score.

Summary

4.61 Berkhamsted town centre has below national average representation of convenience and comparison goods shops and an above average number of service businesses. For a centre of its size, this is not unusual, as Berkhamsted provides an important service centre role for the local community. The town centre has few multiple retailers and no department stores. The main foodstores within the town centre are Waitrose and Tesco.

4.62 Although only having two of the top 20 retailers, there is a reasonably good retailer demand from a variety of clothes, furniture and household goods stores. There is also a requirement from a range of A3 providers such as restaurants, coffee shops and takeaways. This healthy level of demand is a positive indicator for the town centre, as is the low shop vacancy rate.

There is very little information with regard to retail rents and retail yields; therefore it is difficult to comment accurately on this area of the health check.

4.63 Berkhamsted is very accessible by road, bus and railway although a high level of through traffic along High Street can hamper this accessibility. The car parks are well maintained with good surfaces, however signage and access could be improved. From the on-street survey, it is possible to deduce that perception of crime levels within Berkhamsted is low, a result which is broadly supported by the environmental quality survey.

4.64 The environmental quality survey results showed that the main street pavements within Berkhamsted are in good condition. Most are wide, allowing for good pedestrian movement. There is a high level of cleanliness and little graffiti. The main weaknesses include that there is not enough provision for cyclists, the side streets are in a relatively poor state, being uneven with no pedestrian crossing or dropped curbs for wheelchair users. The amount of traffic passing though the centre is a barrier for pedestrians crossing High Street. Most shop fronts are in good repair, however the appearance does deteriorate towards WHSmith and Tesco.

4.65 From the retailer and business survey it is clear that Berkhamsted is offering a stable business environment for businesses to thrive. The fact that many businesses are retaining and in some cases increasing their level of staffing, as well as evidence of new businesses coming into the town centre shows a good level of business confidence. This coupled with a significant percentage of respondents stating that their business is growing and that they plan to expand, are signs that Berkhamsted offers a strong location for retailers and other businesses which wish to operate in a centre of this size and type. However concerns were raised by retailers about the number of service businesses which were locating in the town centre; and many stated that more shops were needed in the centre to improve the retail offer for customers.

4.66 Overall, we conclude that Berkhamsted town centre is performing well for its size and type. Many such small town centres have been under pressure from larger centres and have struggled to provide an attractive shopping offer. Whilst the town centre's retail offer is limited it has become a very important services centre. This coupled with its very attractive historic environment should ensure a vital and viable future for the town centre. However, it will be vital that 'anchor' food shopping is not decentralised to out-of-centre sites from the core retail area.

5 Tring Town Centre

5.1 Tring town centre contains 92 retail and service units. The centre's primary shopping frontage is along High Street. There are no significant anchor stores but there is a pedestrianised area, Dolphin Square that contains a Budgens supermarket as well as some convenience goods retailers. Secondary frontages are located along Frogmore Street and Akeman Street. Table 5.1 summarises the main shopping areas within Tring town centre.

Table 5.1: Summary of main shopping areas in Tring town centre

Street	Description
High Street	Primary frontages, stretching from east to west with no anchor stores.
Dolphin Square	Small pedestrianised square containing Budgens and small convenience stores.
Frogmore Street	Secondary shopping area with mainly services
Akeman Street	Secondary shopping, take-aways/cafes

Source: Donaldsons, 2005

Diversity of Uses

5.2 Table 5.2 sets out the occupancy of these units in terms of the retail categories for comparison, convenience, service and vacant units. This is set against the national average for town centres to provide a comparison. Table 5.2 demonstrates that the number of comparison goods retail units in Tring, in November 2004 is lower than the national average, having a 23% variance. The convenience goods offer was also very low. Service provision was higher with a high degree of variance (37%); and vacancy rates were lower than the national average. From this data it is clear that Tring is primarily a services centre rather than a shopping location.

Table 5.2: Retail and services provision in Tring town centre by number of units

Type	No of Units	% of Total	National Average %	Variance %
Comparison	23	25	48	-23
Convenience	4	4	9	-5
Service	62	67	30	37
Vacant	3	3	10	-8
Total	92			

Source: Experian Goad, November 2004

Notes: Percentages do not always sum to 100% because of rounding.

5.3 Table 5.3 shows that the floorspace occupied by the various sectors within Tring town centre. Analysing the town centre by floorspace offers a similar pattern to the shop numbers analysis in table 5.2. Service provision has the highest percentage of floorspace, three times higher than the UK average and showing a 47% degree of variance. Comparison, convenience and vacant floorspace provision are all well below the national averages.

Table 5.3: Retail and service floorspace provision in Tring town centre

Type	Sq m	% Floorspace in Town Centre	% gross floorspace UK	Variance %
Comparison	3,488	27	53	-26
Convenience	1,116	8	16	-8
Service	8,221	62	20	42
Vacant	335	3	8	-5
Total	13,160			

Source: Experian Goad November 2004

Notes: Percentages do not always sum to 100% because of rounding.

5.4 The diversity of retail uses in Tring town centre is supplemented by some important buildings, including the Anglican Church and the library, as well as the Council offices in Victoria Hall in Akeman Street. There is some civic space within Church Square, along High Street and within the pedestrianised Dolphin Square. There is also the Walter Rothschild Zoological Museum and the Arts Education school, both situated close to the town centre.

Retailer representation

5.5 A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can enhance the appeal of a centre to shoppers. In November 2004, 23 of the 92 units in Tring (25%) were occupied by multiple retailers (including services). This figure is well below the national average of 34.15%. None of the top 20 retailers is present in the town centre. Tring has a high proportion of small independent shops and restaurants.

5.6 Retailer demand to locate in a town centre provides a good indication of the health of a town centre. As is to be expected from a town of its small size, there are very few retailer requirements. Table 5.4 highlights the current requirements:

Table 5.4: Retailer Requirements, Tring

Type	Name	Minimum Size (sq m)	Maximum Size (sq m)	Date
Convenience	Aldi stores	n/a	n/a	28/01/2005
Comparison	Cotswold Clothing Company	233	326	31/01/2005
A3	Forno Vivo Ltd	326	465	22/11/2004
	Total	**558**	**791**	

Source: Focus, 2005

5.7 The minimum figures are the totals of each company's minimum, and the maximum the totals of their maxima. Altogether a total of three businesses have expressed a demand for floorspace within Tring town centre. The floorspace required ranges from 558 sq m to 791 sq m. There is one published requirement from a convenience retailer, Aldi, which does not disclose its size requirements.

5.8 There are a number of small independent shops and services, including clothing shops, home furnishing shops, a bookshop and a music shop. The type of uses present are to fulfil the needs of the resident community rather than to be a destination shopping town for visitors. In terms of the services sector, there are a number of A2 professional and financial services present amongst the comparison goods retailers, including Barclays, Natwest, Woolwich and HSBC. In addition there are a number of cafes and restaurants, bars and public houses.

5.9 With regard to convenience goods shops, there are a few independent retailers as well as Threshers and Budgens within the town centre. Tesco is located on an out of town site to the east of the centre, in a store which extends to 1,624 sq m net.

Shop Rents

5.10 There is very little information available on retail rents in Tring town centre, and there have been few, if any recent lettings.

Commercial Yields

5.11 There is very little information available on commercial yields within Tring. The town centre is too small to have an active property investment market, or to be included in the VOA published information.

Vacant Retail Property

5.12 There is approximately 335 sq m of vacant floorspace within Tring. This equates to 2.5% of the total floorspace, which is much lower than the UK average of 8%. The low vacancy rate is an encouraging sign that Tring is popular with small businesses. From the Experian Goad information, three units were vacant within the town. These were located on the periphery, and are unlikely to be vacant for long.

Pedestrian Flows

5.13 There is no up to date information on pedestrian flow counts within Tring which would be of use to this study. This is because the town centre is too small to have been included in the national programmes of town centre flow counts by PMRS and other agencies. On the day of our inspection (Tuesday Lunchtime) Tring was moderately busy with people making use of the banking facilities and cafes. The busiest part of the town centre was in and around Dolphin Square, although the routes to and from the car parks also had a relatively high pedestrian flow.

Accessibility

5.14 Tring town centre is located between Aylesbury and Hemel Hempstead on the A41. It is located approximately ten kilometres from each town. There is not a railway station actually in Tring, however there is a station a mile north east of the town situated in a small hamlet called Tring Station. The line is the West Coast Main Line between London Euston and the North West, the same line which serves Berkhamsted and Hemel Hempstead.

5.15 There is a choice of bus services serving Tring town centre including the following routes:-

- 387 Tring - Aldbury via Tring Station.
- 500, 501 Watford - Aylesbury via Berkhamsted, Hemel Hempstead, and Tring.
- 414 Hemel Hempstead (Maylands Avenue) - Tring, once a day.
- 322 Hemel Hempstead - Tring, once a day.
- 61 Luton - Aylesbury via Tring.
- 161 Aylesbury - Whipsnade Zoo via Tring on Sundays only.
- 62 Tring - Leighton Buzzard on Tuesdays and Saturdays only.
- 63, 64 Marsworth or Ivinghoe - Aylesbury via Tring.
- 170 Marsworth - Tring Station
- 194 Chesham - Tring - Chesham on Mondays, Wednesdays, and Fridays, once a day.
- 327 The Chilterns Rambler. Hemel Hempstead - Berkhamsted - Ashridge - Whipsnade - Dunstable - Ivinghoe - Bulbourne - Tringford - Wilstone Reservoir - Tring Rose and Crown - Tring Station - Aldbury - Ashridge - Ringshall - The Gaddesdens - Water End - Piccotts End - Hemel Hempstead Runs 3 times during the day.

5.16 There are three main bus stops along High Street, one at either end and one at Church Square. There were no real-time bus information systems in Tring.

Parking

5.17 Tring town centre has four car parks available for shoppers and visitors. In total there are approximately 148 Long Stay parking spaces and 204 short stay spaces. The car parks are centrally located with Frogmore Street Car park and The Forge serving the eastern section of the town centre and the Old School Yard and Victoria Hall car parks serving the western section.

5.18 All of the main car parks within Tring have been assessed for quality. We used a proforma to assess each car park individually. A copy of the proforma and a complete table of results is included at Appendix 1.

5.19 The main strengths of the car parks surveyed were the high level of cleanliness and the quality of the car park surfaces. All the car parks had very little litter and graffiti; and all scored four or five (on a scale of 1 to 5 when 1 is very poor and 5 is very good). All the car parks were tarmaced and in good condition, with few potholes and little evidence of surface cracking.

5.20 The main weaknesses of the car parks were the level of security, signage and lighting. Security in each of the car parks was poor, with the exception of Frogmore Car Park East which had CCTV. Signage to The Forge car park was good, giving motorists plenty of time to see the sign and turn into the car park. The remaining car parks were poorly signed from High Street. Generally all the car parks could benefit from more lighting to increase security at night.

Customer Views and Behaviour

5.21 In accordance with the project brief, we designed and commissioned an on-street interview survey of shoppers and other town centre users. This was based on a random sample of 152 interviews, at locations along High Street; with interviewing conducted in May 2005 on a consecutive Thursday, Friday and Saturday between 9.00am and 6.00 pm. The questionnaire was designed by Donaldsons following consultation with Dacorum Borough Council. 26 interviews were conducted on Thursday, 52 on Friday and 74 on Saturday. Appendix 2 also includes the full results of the survey, as well as the results of the similar surveys undertaken in Hemel Hempstead and Berkhamsted town centres.

Purpose of Visit to Tring Town Centre

5.22 In question three, respondents were asked about the main purpose of their visit to Tring town centre on the day of the interview. 27% of all respondents stated that they were doing non-food shopping and 24% food shopping. 9% of all respondents indicated that they were using the centre's financial services, 13% stated that they work in or near the town centre, 11% of respondents were in Tring for other social or leisure reasons and 7% were in the centre to use other services. Other reasons stated for visiting were for meeting friends, for business, visiting restaurants, tourism and sightseeing, and education.

5.23 In terms of secondary purposes for visiting the town centre, 43% of respondents stated that they were there for nothing else other than their primary reason. Of those people that had a secondary reason, food shopping and non-food shopping were also the most mentioned activities. However 9% of all respondents were there to go to restaurants. 7% of respondents indicated that their secondary reason was to shop in the market, and 7% were visiting the financial services. Other secondary reasons included visiting the library, visiting friends and sightseeing.

Reasons for Choice of Tring for Shopping or Services

5.24 Question five asked respondents why they had chosen to come to Tring town centre on that day for shopping and services. 85% of all respondents said it was because it was close to home, close to work or close to friends or relatives. This indicates that the majority of respondents were visiting the centre because its location was convenient to them, ie. because of proximity factors. The remaining 15% came to Tring due to attraction factors, such as the 5% of all respondents who came to visit a particular shop or service. 2% of respondents indicated that they were there to visit the market. The remaining 8% visited Tring for a wide variety of different reasons, such as because it is easy to get to by car, it is an attractive environment or they were visiting as a tourist.

5.25 When respondents were asked about which particular shops/services they used, 43% of those who answered stated that they were visiting various facilities. Other answers included visiting the bank, the church, Martin's Arts and Crafts and Thomas Cook.

Goods Purchased

5.26 Question six asked what respondents had bought or expected to buy in Tring town centre on that day (respondents could give more than one answer). From the responses given, clothes and shoes accounted for 1%, food and groceries for 47%, chemists and medical goods 4%, confectionery/tobacco/newspapers and magazines 16%, Leisure and luxury goods 6%, household textiles and soft furnishings 0.2%, hardware DIY goods and decorating supplies, tools and garden products 10%, audio visual equipment 0.7%, furniture, carpets and other floor coverings .7% and household appliances 3%. Therefore, a large number of respondents were shopping in Tring for convenience goods. The reasonably high proportion shopping for hardware and DIY goods, etc, reflects the good traditional hardware shops in the town centre. The very low proportion shopping for clothes and shoe reflects the lack of such shops and the district function or Tring town centre.

Expenditure

5.27 Question seven asks respondents how much they have spent or intend to spend in the town centre on food on the day of their visit. 49% of respondents stated that they would not spend anything. 36% of respondents would spend £10 and under, 9% would spend between £11 and £20, 8% of respondents would spend more than £20. The average spend on food from respondents was £13.92.

5.28 Question eight asks respondents how much they have spent or intend to spend in the town centre on non-food on the day of their visit. 50% of respondents stated that they would not spend anything. 36% of respondents would spend £10 and under, 8% would spend between £11 and £20, 7% of respondents would spend over £20 and 1% didn't know how much they would spend. The average spend on non-food items from respondents was £14.26.

5.29 As with the results for Hemel Hempstead, these average expenditures should be treated with some caution. However, they do confirm the limited non-food shopping role of Berkhamsted town centre.

Frequency of Visit to Tring Town Centre

5.30 Question nine asked how often respondents visit Tring town centre for food shopping, non-food shopping, financial or personal services, leisure facilities and visiting pubs, cafés and restaurants. Of those who did visit Tring for food shopping, 27% of all respondents indicated they came to Tring at least once a week. 40% of respondents came more frequently, either every day or 2 –3 times a week. A further 7% came less regularly, either once a fortnight or once a month; with the remaining 27% coming less often or never to undertake food shopping in the centre.

5.31 In terms of other attractions, using once a week or more often as the cut off, 61% of all respondents visited at least once a week for non-food shopping, whilst 55% visited at least once a week for financial or personal services. Significantly less people visited regularly for entertainment purposes; with only 22% of respondents indicating they visited Tring at least once a week for leisure facilities, whilst 25% of respondents visited pubs/cafés and restaurants in the centre at least once a week.

Things Liked About Tring Town Centre for Shopping or Services

5.32 Respondents were asked without prompting (Question 10) what they liked about Tring town centre for shopping or services (respondents could give more than one answer). 28% of all respondents stated that what they liked about Tring was the attractive environment. 13% of all respondents said that they liked the non-food shops. 12% of respondents said that they liked the good range of financial or personal services, 11% of respondents stated they liked the food shops. 10% of respondents liked the clean streets, 9% of respondents liked the market. 11% of respondents liked the good restaurants and cafes, 9% stated that Tring was a friendly town. 9% of respondents stated that they liked nothing or very little. Other likes which were specifically stated by respondents included the small independent non-food shops in the town and the fact that the town isn't too busy.

5.33 When asked which particular shop/service they liked in Tring, (8 respondents in total) 50% of the respondents who answered this question liked the hardware shop. Other shops which were specifically mentioned included individual food shops, including grocers and bakers, Metcalfes, the Museum and Almar.

Things Disliked About Tring Town Centre for Shopping or Services

5.34 The fact that Tring is regarded positively by a large proportion of respondents is further emphasised by the fact that 43% of respondents could think of nothing or very little which they disliked about the town centre (question 11). When compared with the 9% who could think of nothing which they liked, this shows a very positive balance of likes over dislikes. The main unprompted dislikes (respondents could give more than one answer) were the poor range of shops (18%), the amount of traffic congestion (12%), car parking being too expensive (9%), danger from vehicles as the streets are not fully pedestrianised (6%). Other dislikes which were mentioned was the poor range of services, the difficulty of parking near the shops and the streets being dirty.

Use of the Town Centre in the Evening

5.35 The survey was undertaken by interviewing town centre users during the day. As such, it was a survey with a strong daytime bias. It did not interview people who only go to the town centre in the evening, so does not provide the complete picture of the evening economy. However, daytime users of the centre were asked about their use of the town centre in the evening.

5.36 In terms of frequency of visit, 52% of all respondents said that they never visit Tring town centre during the evening. 18% of all respondents indicated that they visited the centre in the evening at least once a week. A further 34% visited the centre in the evening but less often.

5.37 Those 65 respondents who did visit the centre in the evening were asked their main reasons for visiting the town centre in the evening. Cafés and restaurants were mentioned by 60% of respondents, pubs and bars by 39%, 6% go to weekly meetings at the community hall, 5% go to a place of worship.

5.38 The same group of 65 respondents were also asked what they liked about the town centre in the evening (question 14). Of those respondents 54% stated that there were good cafes, restaurants and bars. 19% of respondents stated that it was a secure environment. 14% of respondents indicated that it was easy to get to by car and 12% stated that there was good car parking. 9% stated that Tring offered an attractive environment. Only 15% of respondents stated that they liked nothing or very little about Tring town centre.

5.39 The same respondents were also asked what they disliked about the town centre in the evening. A very positive 52% of respondents could think of nothing that they disliked about the centre, again indicating a strong positive balance of likes over dislikes. 15% stated that they disliked the fact that there are poor leisure, entertainment and cultural facilities. 11% of respondents indicated that they disliked vandalism in Tring. Other dislikes included poor public transport, poor cafes and restaurants, dirty streets and graffiti and a feeling of being unsafe.

5.40 The scores for the tables below are worked out from the on-street interview survey. Each respondent was asked to rank each aspect of the town centre. The ranking ranged from Very poor (1) to very good (5). The score which was most frequent provided the average included in the table.

Table 5.5: Evening ratings for Tring Town Centre

Topic	Average Score
Car Parking	4
Bus services	0
Safety and security	4
Range of evening attractions	3
Quality of evening attractions	3.5
Cleanliness of Streets	4
Attractiveness of town centre	4

Source: Donaldsons, 2005

5.41 Table 5.5 shows that Tring scores fairly well for evening ratings with a majority of scores being four. However there are slight weaknesses in regard to the range and quality of activities available. A large proportion of respondents did not know about the bus services.

5.42 Similarly, all respondents were asked to rate the same aspects of the town centre in the daytime, using the same scoring system. The results for all respondents are set out in Table 5.6.

Table 5.6: Daytime ratings for Tring Town Centre

Topic	Average Score
Car Parking	4
Bus services	4
Safety and security	4
Range of shops	4
The Market	4
Range of services	4
Cleanliness of Streets	4
Attractiveness of town centre	4

Source: Donaldsons 2005

5.43 This table shows a very positive result for Tring with regard to overall perceptions of the town centre and its environment, with all topics obtaining a 'good' score. Tring has a consistently high environmental standard.

Mode of Travel

5.44 Respondents were asked how they had travelled to the town centre on the day of interview. 50% of all respondents had walked to the centre, 45% had travelled by car and 3% had travelled by bus. The remaining 2% had cycled into the centre.

Profile of Respondents

5.45 24% of respondents were aged 65 years or over, 11% were aged 56 – 65 years, 19% were aged 46 – 55 years. 18% of respondents were aged 36 – 45 years, 14% were aged 26 – 35, 9% were aged 19 – 25 years and 5% were aged 0 – 18 years. A majority of respondents lived in a household where there was at least one person in full time or part time employment.

Business Survey Results

5.46 The business survey gives some indication as to how existing businesses in the area perceive Tring town centre. We sent out 95 questionnaires and had a response rate of 24% (23 businesses). The responses covered the spectrum of businesses operating within the town centre and included services and comparison and convenience goods retailers. The full results can be found in Appendix 3.

5.47 A majority of respondents employed less than five people, and 52% of all respondents employed between two and five people. Tring has small retail units with small independent retailers and therefore smaller numbers of employees is to be expected. 43% of respondents stated that the number of people they employ has stayed the same over the last five years. However 26% of respondents stated that their workforce had increased and the same percentage stated that their workforce had decreased.

5.48 All respondents have been located within Tring for over two years, and a majority of these have been at their current location for over ten years. 57% of respondents described their business as steady, 26% stated that their business is growing, and a significant 17% stated that their business was declining. In regard to future policy, 74% of respondents plan to stay the same, 17% plan to relocate and only 9% plan to expand within Tring.

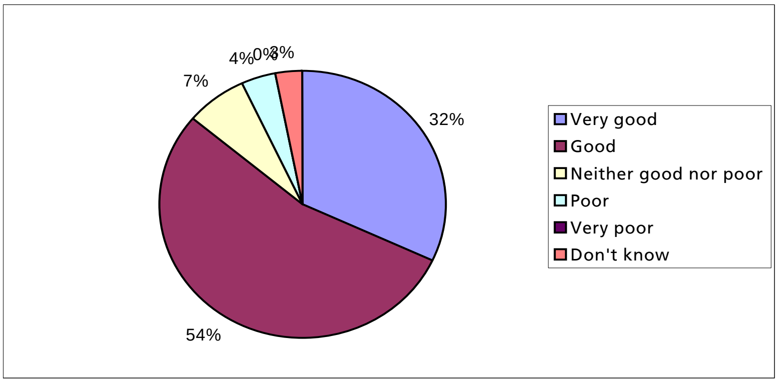
5.49 From the business survey a number of key advantages of the town were highlighted. These included that Tring had a good range of independent retailers and that it was a friendly town. The main weaknesses stated included a lack of parking and heavy through traffic. Litter was also mentioned, as was a lack of attractions and a lack of variety of size of retail units.

5.50 A number of improvements were suggested for Tring, which included expanding the retail/leisure, offer of the town and to encourage late night shopping. It was suggested that parking measures should be reviewed ands the amount of pigeons should be kept under control.

Crime and Security

5.51 From the on-street shopper survey Graph 5.1 illustrates perceptions of those people interviewed of safety and security within Tring during the day:

Graph 5.1: Perception of Safety and Security within Tring during the Day



Source: On Street Shopper Survey, Donaldsons, 2005

5.52 86% of people surveyed thought that security in Tring was good or very good. Only 5% stated that it was poor or very poor. In the evening this proportion falls slightly with 80% of those surveyed describing the security level as good or very good and 5% describing security as poor or very poor. These are encouraging results, which show that there are few security problems in the town centre.

Environmental Quality

5.53 In order to assess the state of the environment, a survey was undertaken of the main shopping areas within the town centre, High Street, Frogmore Street, Akeman Street and Dolphin Square. The proforma and results are found in appendix 4. Table 5.7 summarises our assessment of the town centre environment within Tring. As with Hemel Hempstead, ten environmental features were assessed, and these features were rated on a scale of one to five, where one is poor and five is very good. The average scores for each aspect of the centre reviewed were as follows: -

Table 5.7 Environmental Quality Survey Results

Topic	Average Score
Condition of carriageway and pedestrian surface, street lights, bollards, signs, traffic signs and signals	2.75
Seats/Planters/Hanging baskets/ Litter bins/ water features/ public art	2
Public facilities, telephones, bus stops, shelters, public toilets	1.75
Graffiti, fly posting, vandalism	3.5
Market stalls and street traders	N/a
Barriers to movement	3.5
Cycle parking	1.75
Maintenance and repair of buildings, shopfronts and canopies	3.25
Personal security and police presence	2.75
Wheelchair access, facilities for the blind	2.75

Source: Donaldsons, 2005

5.54 Table 5.7 indicates the overall picture of the environment throughout the central area of the town centre. The quality throughout the centre was a little variable. Tring scored well overall with regard to building maintenance, security, disabled access and the low levels of litter; reflecting the Councils efforts to keep Tring pleasant for visitors. The amount of cycle parking, public facilities and the low level of street furniture are the main weaknesses for Tring. However, one of the reasons for the latter is the narrowness of the pavements, limiting opportunities to install seats and planters for example.

Dolphin Square

5.55 Dolphin Square has the highest score for environmental quality in Tring. It is a pedestrianised area therefore providing excellent ease of movement. The condition of the paved surface is good with little cracking. The street furniture is well maintained. There is a high level of security due to the design of the square and the presence of CCTV. Disabled access is good, as there are ramps at all entrances.

5.56 The main weakness is the amount of graffiti within the square, and there was also some litter. There are no public facilities within this area; however it is a short walk to public toilets situated in The Forge car park. There are litterbins, seats and some examples of public art, but there were no water features or planters. Cycle racks are provided near the entrance to Dolphin Square, however this could be improved with better cycle provision. The shop fronts could be brightened and the general level of maintenance needs to be improved.

High Street

5.57 High Street's main strengths are its level of cleanliness, and good condition of carriageway. It is fairly easy to move around despite the narrow pavements, because the pedestrian density is low, and High Street has a speed limit of 20 mph. Some improvement could be made to the maintenance and repair of some of the buildings, the level of personal security and the level of disability access. High Street's main weaknesses were its lack of public facilities and the lack of public art, planters, litterbins etc (partially due to the narrow pavements).

Akeman Street and Frogmore Street

5.58 Frogmore Street and Akeman Street are similar in style, both leading away from the main High Street. Both had low scores for the condition of the carriageway, which was cracked in some places. There was little street furniture on either of the streets and the level of disabled access was also poor. Frogmore Street had wide pavements which aided ease of movement, whereas Akeman Street had very narrow pavements. A further difference was that Frogmore Street had more litter and graffiti than Akeman Street. There is potential for these areas to be improved with higher general maintenance and more thought given to providing for disabled users.

Summary

5.59 Tring town centre has below national average representation of convenience and comparison goods units and an above average number of service units. For a centre of its size this is not unusual, as Tring provides an important service centre role for the local community. The town centre has no multiple retailers and no department stores. The main foodstore within the town centre is Budgens, and on the edge of the town centre there is a Tesco store.

5.60 There are only three retailer requirements for Tring, however there is a low shop vacancy rate. There is very little information with regard to retail rents and retail yields, therefore it is difficult to comment accurately on this area of the health check.

5.61 Tring is fairly accessible by car and bus, but is less so by train as the station is situated approximately 1.5 kilometres from the actual town centre. The car parks are convenient and are well maintained, although they would benefit from being better lit which would improve the levels of security. Tring was perceived by survey respondents as a safe place, with low levels of crime.

5.62 The overall environmental quality of the town centre is fair, although there was evidence of litter and graffiti. Dolphin Square provides a good civic space, which at present is not reaching its full potential. The Square could be improved by introducing a greater level of public art and by improving and maintaining the shop fronts. Pavements in High Street are in good order, the crossing points are well sited and traffic is limited to 20 mph. A high level of security such as CCTV and police presence is not evident. However the general ambience of the town and the perceptions of town centre users is that there are fairly low levels of crime.

There are few facilities for cyclists, a feature which can easily be improved by the installation of more cycle racks.

5.63 From the survey of businesses it is clear that few new businesses have come into the town centre in recent years and few existing businesses are planning to expand within it. Tring as a location for retailers and businesses has remained stable especially with regard to the number of businesses that have been situated within Tring for over ten years. However there is little evidence of growth or confidence in Tring as a good location for businesses in the future. This probably reflects its role as a very small town centre overshadowed by the much larger centre of Aylesbury nearby.

5.64 Overall, we conclude that Tring town centre is holding its own as an important small services and shopping centre, providing for the day–to–day shopping needs of the town's residents. It would benefit from upgrading of Dolphin Square.

6 Town Centre Frontage Analysis

6.1 As part of this study, Dacorum Borough Council requested that a frontage analysis be undertaken within the primary and secondary shopping areas in each town, to guide planning policy formulation. The retail frontages have been split into blocks and analysed on a block by block basis to identify the exact location of primary and secondary retail areas. Appendix 5 defines the area of each block within each town. The data used to analyse each block has originated from Experian Goad.

6.2 Our policy suggestions in this section include some limit on certain uses, expressed as percentages by number of shops. We accept that any such limits are bound to be somewhat arbitrary; and not always capable of being supported by quantitative analysis. However, they are based on our professional judgement, and we believe they are realistic and a practical way of helping to safeguard the vitality and viability of the town centre.

Hemel Hempstead

6.3 Hemel Hempstead has a town centre with a definite primary retail core and secondary retail location. The dynamics of the town centre will be likely to change with the opening of the Riverside Centre, and we have tried to anticipate and accommodate this likely change within our policy recommendations. The town centre has been split into eight blocks (see map 5.1 in Appendix 5). Table 6.1 analyses those frontages with regard to the percentages of comparison, convenience, service, A3, office and vacant units.

Table 6.1: Unit Types per Block – Percentages – Hemel Hempstead

Block	Location and type	No of units	% Comparison	% Convenience	Total Retail %	% A3	% Other service	Total Service (incl A3)	% Office	% Vacant	% Misc
1	Primary retail, located along Marlowes at the southern end.	17	64.7	35.3	**100%**	0.0	0.0	**0**	0.0	0.0	0.0
2	Primary retail, located mid-way along Marlowes	36	44.4	2.8	**47.2**	25.0	19.4	**44.4**	0.0	8.3	23.1
3	Secondary retail, located towards the northern end of Marlowes.	40	22.5	5.0	**67.5**	17.5	40.0	**57.5**	10.0	2.5	6.3
4	Secondary retail, located at the northern end of Marlowes	23	8.7	4.3	**13**	34.8	43.5	**78.3**	4.3	0.0	0.0
5	Secondary retail, located at the northern end of Marlowes.	28	17.9	7.1	**25**	10.7	57.1	**67.8**	3.6	3.6	12.8
6	Primary retail, located at the southern end of Marlowes.	29	48.3	10.3	**58.6**	6.9	31.0	**37.9**	0.0	3.4	11.9

Source: *Experian Goad, 2003*

Notes: *Percentages do not always sum to 100% because of rounding.*

6.4 We suggest that the Council may wish to address, in particular, a potentially growing role for A3 uses in Hemel Hempstead town centre. This is on the basis of our judgement of the following:

- The new Riverside Centre may well have a transitional impact on the existing town centre, creating some vacancies which A3 uses may wish to reoccupy.

- Consumer expenditure on eating and drinking has increased substantially in the last few years, and growth is expected to continue, albeit probably at a reduced rate.

- The current deficiency in cafes and restaurants in the town centre, futher provision of which would meet a need, increase dwell time, and maximise use of the wide pedestrianised area of Marlowes.

6.5 There may be a number of ways of accommodating this use, and one option the Council might consider is set out below in our analysis of the frontages. We have taken the view that A3 uses could occupy a greater proportion of shop uses in certain parades and we consider a maximum of 25% A3 (by number of shops) would be reasonable for the Marlowes frontages to Blocks 1, 2 and 6 as indicated below. However, we recognise that it would be down to the Council to decide on what it considers to be an appropriate level should it pursue this particular option; which should take into account the degree to which the new Riverside development satisfies some of this need for additional A3 uses.

6.6 Block 1 is in the prime retail core in Hemel Hempstead at the south end of Marlowes on the west side. With the completion of the Riverside Centre it is possible that primary shopping will migrate southwards. The majority of units in block 1, 65%, are currently used by comparison goods' retailers such as Next and Peacocks. There are no Service businesses within block 1. We consider that to maintain the vitality of the town centre this frontage should be protected as primary frontage; and priority should be given to comparison goods retailers, with some allowance made for A3 retailers. Restricting uses to A1 and up to 25% A3 (by number of shops) will assist the integration of the Riverside Centre into the town centre.

6.7 Block 2 between Bank Court and Bridge Street on the west side of Marlowes, has four frontages. The frontage along Marlowes is occupied predominantly by comparison goods' retailers, and can be considered part of the primary retail area that should be protected by planning policy for A1 and A3 uses. The frontage along Waterhouse Street (parallel to Marlowes) contains mainly A3 and A5 uses of restaurants and take-aways. This provides an important complementary secondary frontage to Marlowes, where people can eat. Secondary frontage within this block is also evident along Bridge Street and Bank Court. Bridge Street and Bank Court run between Marlowes and Waterhouse Street. They both contain mainly secondary retail, service and A3 uses and provide a further supportive function to the prime retail area. On the secondary frontages to Bridge Street, Waterhouse Street and Bank Court, we consider that policies should be flexible in permitting change of use to A2, A3 and A5 uses. In Bank Court, change of use to A4 shall also be permitted, as this area is not close to substantial residential accommodation and could provide an attractive semi-enclosed space for eating and drinking, if any of the banks were to close.

6.8 Block 3 is between Bridge Street and the market on the west side of Marlowes. It has four frontages, Marlowes and Waterhouse Street, linked by The Square and Bridge Street. This part of Marlowes has a higher proportion of services and A3 uses as well as some charity shops. The entire block contains 18% A3 and 40% other services with 23% comparison retail. The comparison component comprises of predominantly lower mid-market multiple retailers, which are located on Marlowes. In order to help create conditions for eventual development of a substantial new retail scheme on blocks 3 and 4 (as discussed in section 10 below), we consider that the Marlowes frontage of Block 3 should be protected from further loss of A1 uses. Improved pedestrian crossing facilities on Bridge Street, close to its junction would help prevent any further loss of A1 uses from Block 3. Along Waterhouse Street, there is a high proportion of office space and some A3 uses. The Square and Bridge Street both contain a high number of services with some independent retailers. These link roads should be maintained as a mixed-use frontage with a flexible planning policy to complement the primary shopping core to the south, where policies should be more restrictive towards loss of A1 uses.

6.9 The Market Square is an area with significant potential. Currently the uses surrounding the market are predominantly secondary retail. The environmental quality of the area is low, as is the perception of the area from businesses and town centre users. There are a number of ways in which this area could be improved. The permanent (and deteriorating) canopies that currently mark the site of the market could be replaced with temporary stalls provided by the market manager. Such temporary stalls could then be taken down when the market is not in use; and the area could be improved to provide a civic space within the town centre, to be used by people wanting to have a break from shopping or wanting to have their lunch, etc.

6.10 A second (and longer term) option for the site would be its relocation to Marlowes, transforming it into a street market. This would free up the current market site for redevelopment, as we discuss in section 10 below.

6.11 Block 4 and block 5, east side of Marlowes, north of Bridge Street have very similar retail occupiers. Both blocks have a high proportion of service businesses. Block 5 has slightly more comparison goods retailers which mainly comprise charity shops and a few furniture stores. Block 4 has a high proportion of A3 units including a large Wetherspoons pub and a KFC. The uses within Block 4 also include the library and an advice centre. We consider that Blocks 4 and 5 should be maintained as a mixed use frontage to maintain a diverse range of uses, in what is a secondary location for retailing.

6.12 Block 6, on the east side of the pedestrianised part of Marlowes is prime retail frontage. It should be noted that this particular aspect of the study did not take into account those retailers located within the Marlowes Shopping Centre. This block contains 48% comparison goods retailers including WH Smith and Virgin Megastore. The frontage also contains a high proportion of service businesses (38%). This is a primary retail area and therefore any increase in non-A1 should be resisted as far as possible.

Conclusions

6.13 Within a town centre of this size it is very important to protect primary retail frontages from being encroached on by service uses. Blocks on 1, 2 and 6 are in particular need of protection from an increase in service businesses (apart from A3). A 25% cap on A3 uses is recommended for the Marlowes frontages of these blocks coupled with a prohibition on change of use to any other services. In practice, this would allow significant growth of A3 uses on the Marlowes frontages of Blocks 1 and 6, but not block 2, which already has 25% of its shops in A3 use. Introducing seating areas outside such cafes and restaurants would increase a sense of place along Marlowes, and provide an additional attraction for shoppers. The pedestrianised part of Marlowes is a wide boulevard, where street seating could be easily accommodated.

6.14 The completion of the Riverside Centre may result in a fall in footfall along the remaining blocks, 3, 4 and 5. Apart from the Marlowes frontage of block 3 it is important that changes of use should be permitted to increase the vitality in these areas. There should be flexibility within these blocks for A1, A2 and A3 uses, providing a diverse mix to support and complement the retail core and maintain its viability.

6.15 Some locations along Waterhouse Street would be appropriate for A4 uses. There are some A4 uses towards the northern end of the street, including a large Wetherspoons and Harry's Market Bar. The unit sizes along this street are more appropriate for A4 uses, as opposed to those units along Marlowes that are longer with narrower frontages. A linear arrangement for A4 uses is preferable as it avoids creating 'ghettos of vertical drinking establishments' that may be perceived as threatening to other evening visitors to the town centre. The added benefits of Waterhouse Street are that it is located well away from any residential areas; and it overlooks the very attractive water gardens without being too far away from the primary shopping core. Introducing A4 uses will add to the diversity of the centre, will bring added amenity value and will help to develop the town's evening economy. A particularly good location for such uses would be within Bank Court (if any of the banks close), where A4 uses can be kept a little away from the main shopping area whilst being located close to it, therefore preventing a conflict of uses.

Berkhamsted

6.16 Berkhamsted is a thriving and attractive town centre, which has a diverse mixture of uses. The town centre has been split into nine blocks for analytical purposes. These blocks are identified in Appendix 5, map 5.2. However due to the retail mix of the town centre it is very hard to identify definite primary and secondary frontage. Table 6.2 analyses those frontages with regard to the percentages of comparison, convenience, A3, other services, office and vacant units.

Table 6.2: Unit Types per Block – Percentages - Berkhamsted

Block	Location	No of units	% Comparison	% Convenience	Total Retail	% A3	% Other Service	Total Service (incl A3)	% Office	% Vacant	% Misc
1	Western end of the town; mainly secondary shopping.	16	18.8	6.3	**25.1**	12.5	18.8	**31.3**	25	0	18.8
2	Predominantly primary frontage.	21	28.6	0	**28.6**	19	33.3	**52.3**	4.8	0	9.5
3	Primary frontage within the central area of the High Street	38	39.47	5.26	**44.7**	7.9	21.05	**29.0**	10.53	7.9	10.5
4	High Street centre, primary and secondary uses.	22	22.73	4.55	**27.3**	4.5	31.82	**36.3**	13.64	4.5	18.2
5	Eastern section of the town predominantly secondary frontages.	18	33.33	5.56	**38.9**	0.0	38.89	**38.9**	22.22	0.0	0.0
6	Towards the eastern edge of the town, secondary frontages.	24	8.33	0.00	**8.33**	12.5	33.33	**45.8**	37.50	0.0	8.3
7	A block south of the High Street; predominantly secondary frontages.	25	4.00	0.00	**4.0**	24.0	44.00	**68.0**	16.00	0.0	12.0
8	Towards the western edge of the town; secondary frontages.	31	19.35	3.23	**22.58**	12.9	41.94	**54.8**	19.35	3.2	0.0
9	Towards the western edge of the town; secondary frontages and offices.	13	0.00	0.00	**0**	23.1	23.08	**46.2**	46.15	7.7	0.0

Source: Experian Goad 2004

Notes: Percentages do not always sum to 100% because of rounding.

6.17 Block 1, east of St Johns Well and west of 250 High Street on the northern side of High Street has a fairly high percentage of A3 and other services provision, 31%. There is a more diverse mix of uses within this area of the town centre including 25% of properties as offices. There is also a garden centre, a postal sorting office, an hotel and a garage.

6.18 Block 2, east of 250 High Street and west of Lower Kings Road on the northern side of High Street has a higher percentage of comparison goods retailers, 29%. However there is also a higher proportion of A3 and other services, 52%. The diversity of uses within this block is less varied, the uses being predominantly comparison goods retailers, A3 and other services.

6.19 Block 3, east of Lower Kings Road and west of Water Lane on the northern side of High Street is similar to blocks 1 and 2, but there is a higher density of comparison goods retailers. The number of comparison goods shops indicates that this is primary shopping frontage. There are also a number of other uses which widen the diversity of this particular block, including the Royal British Legion Social Club and the Town Hall Arcade. The shops are mainly independent retailers interspersed with a few multiples such as Greggs, Clinton Cards and Boots. Levels of other service and A3 units are relatively low in this area, again indicating that this is Berkhamsted's primary shopping area. It is important that the level of comparison goods shops is maintained within this block.

6.20 Block 4, east of Water Lane and west of Castle Street on the northern side of the town has a high proportion of services, 36% with 23% comparison goods retailers. There are also a number of offices, halls and a church. All these additional uses add to the vitality and viability of the town. It is important that the level of A3 and other services is controlled in this area, so that it does not reduce the number of comparison goods retailers. A policy to prevent more services and encourage comparison goods retailers would help to maintain a healthy retail core.

6.21 Block 5, east of Castle Street extending to just beyond Manor Street on the northern side of High Street has a reasonably high proportion of comparison goods' retailers, 33%, and a high level of service provision, 39%. There are also a number of offices within this block. The mixture of uses within this area should be monitored, additional services would be acceptable if it ensures they do not locate within Blocks 2 and 3.

6.22 Block 6, south of High Street between Victoria Road and Chesham Road, has a high proportion of services and office units with some A3 provision, but very little retailing. Offices make a valuable contribution to the town centre, as they provide a stable population to use the centre in the daytime. There are also additional important uses within this block, including a library and a doctor's and dental practice.

6.23 Block 7, south of High Street between Chesham Road and Kings Road is very similar to block five, it contains 24% A3 units, 44% other services, and 16% offices. Only 4% of the properties are in retail use. This is a mixed-use frontage and should be maintained as such by the use of a flexible planning policy. There is also a community centre and an educational establishment.

6.24 Block 8, on the southern side of High Street between Kings Road and Cowper Road, has a very high proportion of services, 55% as well as 19% comparison goods retailers and 19% office space. Again this is a mixed frontage where many of the High Street banks are located. This is an important services area and should be maintained as such.

6.25 Block 9, on the southern side of High Street west of Cowper road and extending just past Boxwell road to the west of the centre, has predominantly office space with some other A3 uses and some service businesses. It contains no retail shops. This block is well away from the primary retail frontages and therefore the fact that it is mainly office space is in keeping with the area.

Conclusions

6.26 The most primary of the shopping frontages are located on the northern side of High street within Blocks 2, 3 and 4. Within these areas it is essential to retain and enhance the comparison goods offer as far as possible, to ensure the vitality and viability of the town continues. Blocks 5, 7 and 8 offer an opportunity to diversify and enhance uses contained within them. These blocks contain frontages which are of a more secondary nature in retail terms, with high proportions of service businesses. Blocks 6 and 8 have high proportions of office units. Office units should be encouraged in these areas to provide a population to use the town centre in the daytime.

6.27 Overall there is no one area with a very high concentration of retailing, but rather a mix of uses juxtaposed to one another. Because the town centre is performing successfully and attracting people for a wide range of retail, services and other uses, we recommend a generally flexible approach is taken to determine what is a suitable use to have in the town centre in any location subject to the following broad principles:

- Maintaining a healthy retail core on the north side of the High Street.

- To avoid the formation of A4 'ghettos' it is suggested that any proposals which come forward from A4 operators are assessed regarding their location, and that an agglomeration of A4 uses within the same location is avoided.

- For blocks 2 and 3, a policy is introduced to resist more A3 and other service operators locating within them.

- Any proposals for changes of use should only be permitted if they would enhance the vitality and viability of the centre.

- Restrictions on lorries loading and unloading goods at certain times of the day.

- Policies should encourage retail development to give depth to Berkhamsted town centre, as opposed to elongating retailing on High Street further.

- Improving integration of both sides of High Street, particularly its central part.

Tring

6.28 Tring is a very small town centre, full of character and history, that primarily has a services function. There are a few destination retailers, such as G.Grace hardware and garden goods store and F W Metcalfe Ironmongery, within the town centre; as well as the Walter Rothchild Zoological Museum and a branch of Champneys Health Resorts (outside the town). Its size does make it difficult to separate the town into primary and secondary frontages. Tring town centre has been split into six blocks and analysed on a block by block basis. The location of the blocks has been identified in Appendix 5, map 5.3. Table 6.3 analyses those frontages with regard to the percentage of comparison, convenience, service, A3, office and vacant units.

Table 6.3: Unit Types per Block – Percentages - Tring

Block	Location and Type	No of units	% Comparison	% Convenience	Total Retail	% A3	% Service	Total Service (incl A3)	% Office	% Vacant	% Misc
1	Western side of the town centre; mainly secondary frontage with some primary frontage towards Frogmore Street.	16	18.8	6.3	**25**	12.5	18.8	**31.3**	25.0	0.0	18.8
2	Centre section of the High street; mainly primary frontage.	21	28.6	0.0	**28.6**	19.0	33.3	**52.3**	4.8	4.8	9.5
3	Pedestrianised shopping area; primary frontage	11	18.2	18.2	**36.4**	18.2	27.3	**45.5**	0.0	0.0	18.2
4	Eastern side of the town centre; secondary frontage.	22	22.7	4.5	**27.2**	22.7	40.9	**63.6**	0.0	4.5	4.5
5	Southern central sector; secondary frontage	23	8.7	0.0	**8.7**	13.0	56.5	**69.5**	17.4	4.3	0.0
6	Western side of the town centre; mixture of primary and secondary frontage	20	35.0	0.0	**35.0**	15.0	30.0	**45.0**	0.0	0.0	20.0

Source: Experian Goad, 2004

Notes: Percentages do not always sum to 100% because of rounding.

6.29 Block 1, is located west of Frogmore Street and north of High Street, it has a small frontage in total. There is an even mix of comparison goods shops and non-A3 services, and a high proportion of office units. The presence of office space is particularly important as it creates a diversity of uses and provides a population of people who will use the town centre during the day. The frontage in Block 1 is a mixed frontage, and this diversity should be encouraged with a flexible planning policy.

6.30 Block 2 incorporates the central part of High Street on its north side as well as shop frontages along Frogmore Street (east side). 29% of the shops are in retail use, and 52% occupied by service businesses. Block 2 (with Block 3) is however the prime retail area within Tring. To maintain a healthy centre the level of comparison goods retail provision should be preserved as far as possible within this location.

6.31 Block 3 is a small frontage concerning the retail units fronting Dolphin Square. It incorporates a fairly high proportion of non-A3 services (27%) as well as an even distribution of comparison, convenience and A3 units (18% each). Due to Dolphin Square being a pedestrianised area, policies should encourage and protect A1 retailers.

6.32 Block 4 is a secondary retail frontage, which contains a high proportion of services (64%). It also has a substantial gap in the frontage due to the car park. In view of the high proportion of services, we suggest that policies affecting this block remain flexible, to permit a diverse range of uses.

6.33 Block 5 has 70% of the properties as services, indicating that this block is a predominantly secondary frontage in retail terms. It is important to create a better mix of uses to complement the activities in Blocks 1 and 2 opposite, and therefore any further changes of use to services should be resisted. Policies, which seek to consolidate comparison goods retailers within the centre and to integrate both sides of the High Street, would be beneficial within Blocks 2, 3 and 5.

6.34 Block 6 comprises 35% comparison goods retailers, with A3 uses and other services occupying 45% of the properties. It would be beneficial for Tring to keep this area for a mixture of uses to maintain diversity, and therefore a flexible policy allowing a variety of uses would be constructive.

Conclusions

6.35 Overall there is a varied mix of uses within the town centre of both a retail services and civic nature. There are no particular concentrations of retailers, and therefore there is little need for strict planning policies restricting changes of use. A generally flexible approach should apply in regard to policy formulation whereby Tring can develop and maintain its service centre function, whilst supporting existing comparison and convenience goods retailers. A broad set of principles can be applied to guide planning policy for Tring:

- To encourage and protect A1 retailers in block 3.
- To avoid the formation of A4 'ghettos' we suggest that any proposals which come forward from A4 operators are assessed in regard to their location, and that an agglomeration of A4 uses within the same location is avoided.
- Any proposals for changes of use should only be permitted if they would be likely to enhance the vitality and viability of the centre.
- Applications for changes of use within blocks two and five should be assessed with regard to strengthening the retail and A3 provision within those blocks.
- Planning policies affecting blocks 1, 4 and 6 should remain flexible to allow for a diversity of uses.

7 Potential for Additional Commercial Leisure Development

7.1 Nationally, commercial leisure covers a wide range of uses, such as cinemas (both multiplexes, and more traditional town centre cinemas), bowling alleys, night clubs, family entertainment centres, health and fitness studios; and various food and drink outlets, such as pubs and restaurants. Many of these are already represented in Dacorum. The commercial leisure market has been growing rapidly over the last 10 years as disposable incomes have increased, together with people being able to devote more time to leisure activities. In this section, we review the existing commercial leisure facilities in the Borough, the demand from operators to open new leisure facilities, and the current patterns of use of existing facilities as indicated by the household interview survey. Finally we set out our conclusions on the need for new leisure developments.

Leisure Facilities in and Around Dacorum

7.2 Appendix 6 shows three maps displaying the distribution of various leisure facilities in and around Dacorum. There is also a schedule detailing the addresses of the leisure facilities in the area. Whilst every care has been taken to ensure this data is as comprehensive as possible it is not a guaranteed complete list of all leisure facilities.

7.3 Leisure Centres and gyms are predominantly located in the areas of higher population (see appendix 6 map 6.1). There is a high concentration of such facilities in Aylesbury, Watford, Hemel Hempstead and Luton. There are also centres located within the smaller towns of Chesham, Amersham, Berkhamsted and Tring. The types of facilities vary, from privately run, small gyms and fitness centres; to large, publicly owned leisure centres.

7.4 There are a variety of other leisure facilities such as cinemas, ice rinks, bowling alleys and bingo halls. Cinemas and cinema facilities are located in the main towns of Aylesbury, High Wycombe, Watford, Hemel Hempstead, Berkhamsted, Luton and St Albans (films showing occasionally at Alban Arena (see Appendix 6 map 6.2). There is one ice rink in Hemel Hempstead at Jarman Park. There are no Bingo halls within Hemel Hempstead, Berkhamsted or Tring. However there are four in the vicinity, two in Luton, one in Watford and one in Aylesbury. There are various bowling facilities, both indoor bowling alleys and outside bowling greens around Dacorum. The other bowling facilities are located in Aylesbury, Luton, Harpenden and Watford (see Appendix 6 map 6.3). There is a high concentration of nightclubs in Luton and Watford. There are also a few in Hemel Hempstead, Aylesbury and High Wycombe (see Appendix 6 map 6.4).

Leisure Representation in Hemel Hempstead

7.5 There are six health and fitness centres within Hemel Hempstead including both publicly and privately owned centres. Four of these centres are within the town centre, and the remainder are located on edge of town sites. Hemel Hempstead also has an Ice Rink, Cinema and Bowling facilities, as well as two nightclubs. All of these facilities are located within the Leisure World Complex at Jarman Park except one nightclub which is located in Marlowes.

Demand for Leisure Facilities

7.6 We wrote to all the main leisure facility providers, including cinema, bingo and gym operators, with the objective of establishing whether they are interested in developing new facilities within Hemel Hempstead. The letters were then followed up with telephone calls to the main operators. We had eight responses in total.

7.7 Health and fitness operators showed the most interest in locating to Hemel Hempstead. One in particular stated that they have a requirement for a 2 to 2.5 hectare site within Hemel Hempstead with a built area of 7,400 sq m. This would be to provide indoor and outdoor facilities for racquet sports. Another gym operator stated that they may have a requirement for a 232 sq m unit to provide a weight loss and fitness centre.

7.8 One bingo operator has expressed a requirement for premises in Hemel Hempstead at Jarman Park. One cinema operator stated that they may consider Hemel Hempstead as a possible location to open a new cinema in the next 12 months. They would require a site of between 2,000 and 3,000 sq m, although this is likely to be a long-term requirement.

7.9 One hotel and leisure operator stated that they were very interested in developing a leisure hotel within Dacorum, possibly in Hemel Hempstead. They require a site in a highly visible location, of about 1.2 to 1.4 hectares. A further hotel operator, Holiday Inn, registered a requirement with Focus in late 2004 for a site in Hemel Hempstead.

Representation of Food and Drink Establishments

7.10 Hemel Hempstead town centre has a variety of restaurants, takeaways, pubs and cafes. These take up 5,850 sq m of ground floor 'footprint' floorspace within the town centre. There are approximately 32 such units within the town centre. The existing A3 operators include main franchises such as McDonalds, Deep Pan Pizza and KFC, as well as independent operators such as Marlowes Restaurant, Banana Leaf Restaurant and Casanova Italian Restaurant.

Demand for A3/A4/A5 Uses

7.11 Table 7.1 summarises the list of A3 operators with requirements for premises within Hemel Hempstead:

Table 7.1: Eating Establishment Operator Requirements

Name	Min. Size (sq m)	Max. Size (sq m)	Date
Blubeckers Restaurant Ltd	167	233	29/10/2004
Brewers Fayre	n/a	n/a	03/08/2004
Brewsters	n/a	n/a	03/08/2004
Forno Vivo Ltd	326	465	22/11/2004
Frankie & Benny's	326	409	22/09/2004
Roosters Chicken Ltd	47	140	03/08/2004
KFC (GB) Ltd	237	270	25/10/2004
Lloyds No1 Bars Ltd	279	279	25/10/2004
O'Briens Irish Sandwich Bars (UK) Ltd	19	130	22/09/2004
Pasty Parlour	65	93	03/08/2004
Republic	186	279	18/02/2005
SFI Group Plc	279	837	03/08/2004
Total	**1,930**	**3,134**	

Source: Focus, 2005

7.12 As Table 7.1 illustrates, there are 12 requirements from a variety of operators including pubs, take aways and restaurants. There is a minimum total floorspace requirement of 1,930 sq m for Hemel Hempstead and a maximum total requirement of 3,134 sq m. This does not include independent operators, which do not normally register their requirements with Focus. Some of the operators on this list will be likely to take space in the Riverside scheme.

Leisure Representation in Berkhamsted

7.13 Leisure facilities are limited within Berkhamsted, mainly due to its size and proximity to Hemel Hempstead, Aylesbury and Watford. There are two gyms, Berkhamsted Sports Centre and Fitness First, and one cinema, The Rex. The Rex is a privately owned, unique, 1930s style cinema, with one screen to serve the needs of the local community.

Demand for Leisure Facilities

7.14 We wrote to all the main leisure facility providers, including cinema, bingo and gym operators, with the objective of establishing whether they are interested in developing new facilities within Berkhamsted. The letters were then followed up with telephone calls to the main operators. None of the main leisure operators had any requirement to open a facility in Berkhamsted, mainly due to the fact that the resident population is too small.

Representation of A3 Uses

7.15 Berkhamsted town centre has a variety of A3 uses including restaurants, takeaways, pubs and cafes. These take up 4,900 sq m of ground floor ‘footprint’ floorspace within the town centre. There are approximately 21 A3 units within the town centre. The existing A3 retailers include main franchises such as Costa Coffee, Ask and Café Rouge, as well as independent operators such as Magoos, Kaceys and Brookes.

Demand for A3 Uses

7.16 Table 7.2 summarises the list of A3 operators with requirements for premises within Berkhamsted:

Table 7.2: A3 Operator Requirements

Name	Minimum Size (sq m)	Maximum Size (sq m)	Date
Forno Vivo Ltd	326	465	22/11/2004
Santa Fe UK Ltd	279	558	29/10/2004
Starbucks Coffee Holdings (UK) Ltd	65	167	22/09/2004
Piccolino	279	744	09/11/2004
Domino's Pizza Group Ltd	70	140	28/01/2005
Caffe Nero Group Plc	70	116	25/10/2004
Basilico	70	112	31/12/2004
Restaurant Bar & Grill	279	744	09/11/2004
Total	**1,437**	**3,046**	

Source: Focus, 2005

7.17 As table 7.2 illustrates, there are 8 requirements, mainly from coffee bars and restaurants. There is a minimum floorspace requirement of 1,437 sq m for Berkhamsted and a maximum requirement of 3,046 sq m. This does not include independent operators, which do not normally register their requirements with Focus.

Leisure Representation in Tring

7.18 Tring has three main leisure facilities. Harveys is a privately owned health and fitness Studio on High Street. Tring Sports Centre is a publicly run facility, and is in dual use with Tring School. It has a 25m swimming pool, multi purpose sports hall, full size all weather pitch and free car parking. Tring is also a location for Champneys Health Resort (located just outside the town) also contains a swimming pool and fully equipped gymnasium. The nearest cinema is in Berkhamsted; and for other leisure facilities the town is located between Aylesbury and Hemel Hempstead.

Demand for Leisure Facilities

7.19 We contacted all the main leisure facility providers to ascertain demand for sites within Tring. As with Berkhamsted, no operators were interested in locating to the area due to the fact the resident population is too small.

Representation of A3/A4/A5 Uses

7.20 Tring has a variety of A3 uses including restaurants, take aways, pubs and cafes. These take up 2,100 sq m of ground floor 'footprint' floorspace within the town centre. There are approximately 18 A3 units within the town centre. The existing A3 retailers are all non multiples and are mainly located within High street, Frogmore Street and Akeman Street.

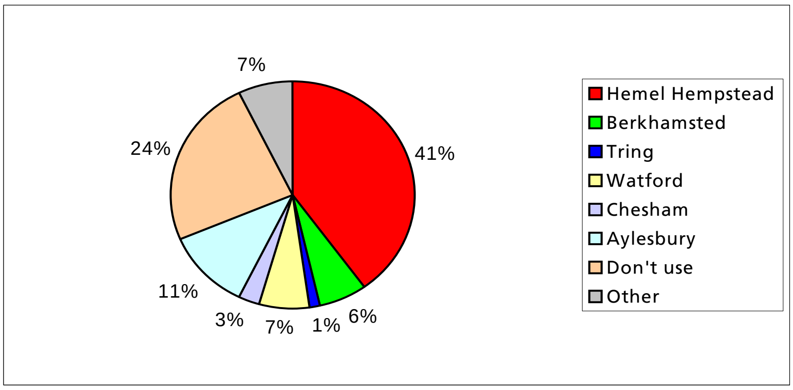
Demand for A3/A5/A5 Uses

7.21 From Focus there is only one operator requirement for premises within Tring, from the restaurant Forno Vivo for a unit of 326 sq m. This level of demand does not include independent operators, which do not normally register their requirements with Focus.

Household Survey Results

7.22 Within the household survey (appendix 7) two specific questions regarding leisure use were included. The first question ascertains which towns are used for particular facilities, whilst the second identifies what improvements could be made to ensure the continued use of the facilities. The following summarises the responses across all zones within Dacorum. The information is based on the results from all zones weight according to the populations of each zone, so that total are statistically representative of the catchment areas as a whole.

Graph 7.1: Cinema Usage in Dacorum

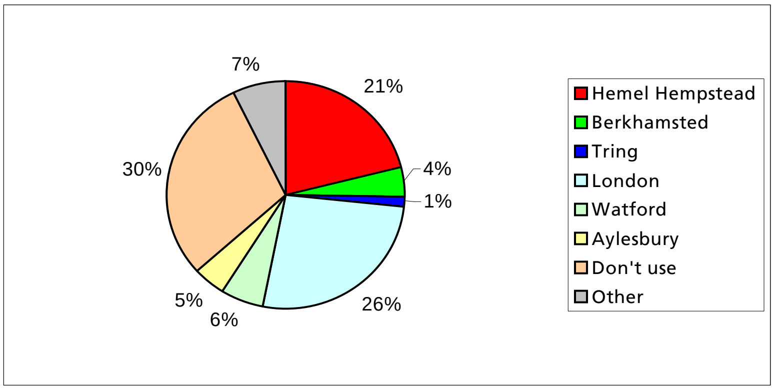


Source: Donaldsons 2005

7.23 Graph 7.1 identifies where people travel within Dacorum to visit the cinema. 41% of all respondents to the household interview survey travel to use the cinemas in Hemel Hempstead.

7.24 The Odeon at Jarman Park in Hemel Hempstead draws the highest amount of visitors in the Borough (40%). The Odeon cinema in Aylesbury draws 11% of respondents. Cinemas located in Watford, Berkhamsted draw a minimal percentage of respondents. It is important to note that a high proportion (26%) of those interviewed did not go to the cinema.

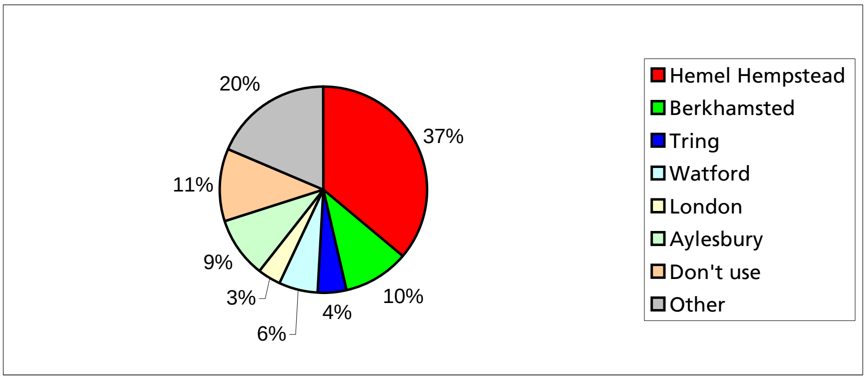
Graph 7.2: Theatre Usage in Dacorum



Source: Donaldsons, 2005

7.25 Graph 7.2 identifies where people travel within Dacorum to go to visit the theatre. 26% of all respondents travel to London to visit the theatre. This was the leisure facility for which the highest proportion of people interviewed travel to London to enjoy. The theatre facilities in Hemel Hempstead were frequented by 21% of respondents. Berkhamsted, Aylesbury, Watford and Tring accounted for 16% of theatre visits. 30% of respondents interviewed did not go to the theatre.

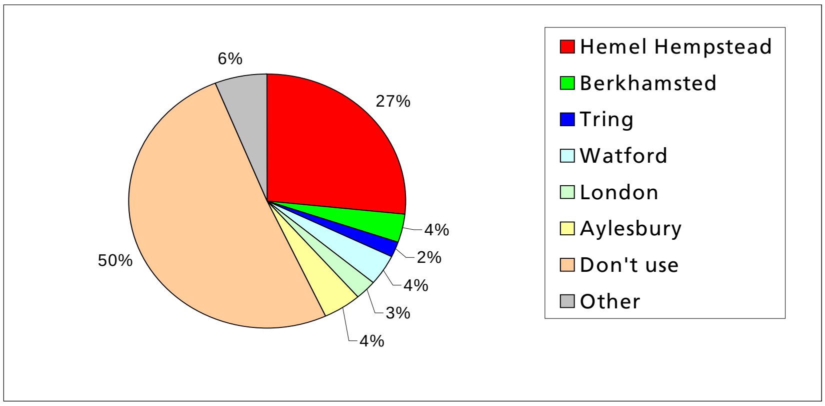
Graph 7.3: Eating Establishment Usage in Dacorum



Source: Donaldsons, 2005

7.26 Graph 7.3 identifies where people travel within the catchment area to visit cafes and restaurants. Hemel Hempstead was frequented by 41% of all respondents. Berkhamsted and Aylesbury attracted 10% and 9% respectively of the people interviewed. Watford, Tring and London accounted for a small proportion of respondents. 11% of those people surveyed stated that they did not eat out.

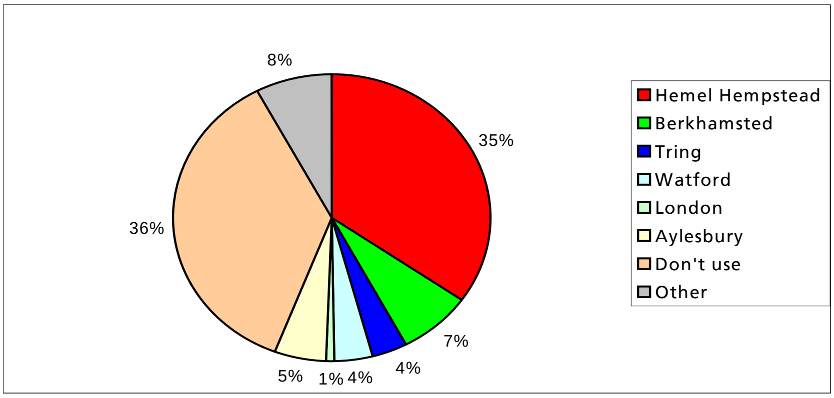
Graph 7.4: Nightclub Usage in Dacorum



Source: Donaldsons, 2005

7.27 Graph 7.4 shows what proportion of people go to nightclubs within the catchment area. A majority of respondents, 51%, do not go to nightclubs. Of the remainder, Hemel Hempstead attracted 27% of all respondents. Watford, Aylesbury, London, Berkhamsted and Tring accounted for 17% of respondents, split fairly evenly between them.

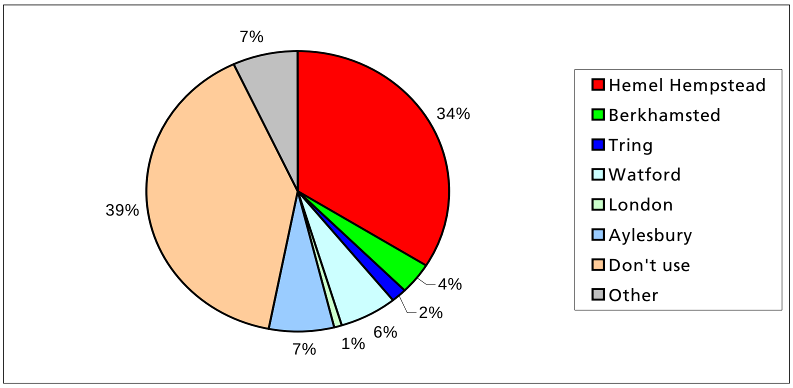
Graph 7.5: Gym Usage in Dacorum



Source: Donaldsons, 2005

7.28 From Graph 7.5 shows that 36% of respondents do not use gym facilities. 35% of respondents use facilities within Hemel Hempstead with majority of these using facilities in Hemel Hempstead town centre. Aylesbury, Berkhamsted, Tring, Watford and London account for a total of 21% of respondents using such facilities.

Graph 7.6: Bowling Usage in Dacorum



Source: Donaldsons, 2005

7.29 Graph 7.6 illustrates bowling usage in Dacorum. However we believe that a substantial number of respondents interpreted this question to mean the sport of bowls, rather than ten-pin bowling as intended. The results of this question, therefore, do not enable us to distinguish between the sport of bowls and visits to bowling alleys (although we recognise that these are quite different activities). 34% of respondents use Hemel Hempstead for bowling activities. 4% of respondents use bowling facilities in Berkhamsted, 2% use bowling facilities in Tring. Watford and Aylesbury accounted for 13% of all respondents. 40% of respondents do not use bowling facilities within the catchment area.

<u>Suggested improvements</u>

7.30 Included within the household survey was a question about what would make respondents' household visit leisure facilities more often. 18% of all respondents indicated that they don't use any leisure facilities. 17% of respondents stated that they would frequent them more if they had more spare time. Practical improvements which were suggested included introducing free parking in the evening, an increase in nearby parking provision, increased security, a better range of facilities and better bus services.

Conclusions

7.31 The most popular leisure activity pursued by people within the catchment area is visiting cafes and restaurants. Visiting the gym or health and or health and fitness centre, and going to the cinema are also popular pastimes. However, it is evident from both the on-street shopper survey and the household survey that a substantial proportion of people do not use the leisure facilities within the Borough.

7.32 Hemel Hempstead provides a variety of leisure facilities, which act as a draw to the town. The surrounding competing centres include Watford, Luton and Aylesbury; with Aylesbury attracting a significant number of people from zones seven and eight i.e Tring and outlying area (for zones see Map 1 in Appendix 8).

7.33 Generally there is not a great requirement for premises from leisure operators within Dacorum, except possibly for a small gym, a racquet centre and a Bingo facility. One cinema operator expressed a possible interest for the medium term, and a leisure hotel operator is looking to open a 'leisure village' (i.e a major leisure facility offering a wide range of activities). The greatest demand comes from eating establishment operators. As discussed in section 3 an increase in eating establishments within Hemel Hempstead town centre would be beneficial to the vitality and viability of the shopping environment. The level of demand is fairly high and therefore there should be few problems in increasing the level of A3/A4/A5 provision within the town centre. The new Riverside Centre is expected to meet some of this need for additional A3 uses.

7.34 With regard to the development of additional leisure facilities within Dacorum, other than A3/A4/A5 uses, our findings suggest that in the short to medium term there will be little demand for further commercial leisure development.

8 Retailer Demand

Retailer Demand – Hemel Hempstead

8.1 Retailer demand for convenience goods was assessed by contacting the main food store operators, outlining the nature of the study and seeking details from them as to their requirements and aspirations for the Hemel Hempstead area. In total we contacted four foodstore operators. For reasons of commercial confidentiality, we have not included each operator's specific requirements within this report. We therefore provide below an overview of our discussions. Those retailers that we were able to speak to included Sainsbury's, Tesco, Morrisons and Aldi. Of these retailers, one had no specific requirements to relocate or extend their stores in Hemel Hempstead.

8.2 One large retailer was very interested in locating into the area. Their nearest stores are in Aylesbury and St Albans and they are keen to expand their offer. This particular retailer requires a three-hectare site to provide a 7,000 sq m store, 500 car parking spaces with a petrol station. They would prefer an edge of centre site, but are flexible and would be willing to discuss this further with the Council.

8.3 One retailer was particularly interested in extending its existing store, increasing its floorspace by 1,200 sq m. The same retailer also expressed an interest in opening a store on the Civic Zone Site and is keen to talk to the Council further about its requirements. Another retailer had a requirement for a minimum site size of 0.3 hectares in preferably a town centre or edge of centre location, for a discount supermarket.

8.4 In addition, table 8.1 below summarises the requirements registered with Focus by other convenience goods retailers:

Table 8.1: Convenience Goods Requirements – Hemel Hempstead

Name	Min. Size (sq m)	Max. Size (sq m)	Date
Aldi Stores Ltd	n/a	n/a	28/01/2005
Farmfoods Ltd	465	651	31/12/2004
Gnc Health Shops Ltd	93	140	28/01/2005
Laithwaites	233	465	29/10/2004
Majestic Wine Warehouses Ltd	186	465	25/10/2004
Total	**977**	**1,721**	

Source: Focus, 2005

8.5 This shows a combined floorspace of between 997 sq m and 1,721 sq m is needed within Hemel Hempstead to accommodate these retailers.

8.6 Table 8.2 summarises retailers' requirements for comparison goods floorspace within Hemel Hempstead, broken down by sector:

Table 8.2: Comparison Goods Requirements – Hemel Hempstead

Type	No. of Requirements	Min. floorspace requirement (sq m)	Max. floorspace requirement (sq m)
Clothing	8	3,912	6,251
DIY	4	10,184	11,067
Electrical	6	930	2,688
Furniture	1	74	465
Household	7	3,962	16,516
Total	**26**	**19,062**	**36,987**

Source: Focus, 2005

8.7 The largest number of requirements for space come from clothing retailers, although the actual amount of space is fairly modest, as these operators require smaller sized units. The two largest requirements with regard to floorspace come from the household goods retailers and DIY retailers (although the household goods have a wide range between minimum and maximum floorspace requirements). In total there is a requirement for between 19,000 sq m and 37,000 sq m of floorspace for comparison goods. Some of these retailers will be likely to take space in the new Riverside Centre. Not all of the others would actually take space elsewhere in the town even if opportunities became available, because of duplication between retailers in some trade groups. Nevertheless, the analysis indicates a healthy level of demand, which generally accords with our retail capacity forecasts.

Retailer Demand – Berkhamsted

8.8 Table 8.3 summarises the requirements registered with Focus by convenience goods retailers. It shows that a combined floorspace of between 997 sq m and 1,721 sq m is needed within Berkhamsted to accommodate these retailers. In addition from our discussions with main supermarket operators it is clear that one supermarket operator already present in the town is very keen to build a replacement store larger than their existing store. They are currently assessing options for a suitable site in the town.

Table 8.3: Convenience Requirements - Berkhamsted

Name	Minimum Size (sq m)	Maximum Size (sq m)	Date
Aldi Stores Ltd	n/a	n/a	28/01/2005
Bacchus Wine Company (Kensington) Ltd (The)	140	279	20/08/2004
Majestic Wine Warehouses Ltd	186	465	25/10/2004
Total	326	744	

Source: Focus, 2005

8.9 Table 8.4 summarises retailers' requirements for comparison goods floorspace within Berkhamsted, broken down by sector:

Table 8.4: Comparison Goods Requirements - Berkhamsted

Type	No. of Requirements	Min. floorspace requirement (sq m)	Max. floorspace requirement (sq m)
Clothing	4	299	633
DIY	1	186	279
Electrical	0	0	0
Furniture	0	0	0
Household	4	1265	2512
Total	**9**	**1750**	**3424**

Source: Focus, 2005

8.10 The largest number of requirements for space comes from clothing and household goods retailers. The latter require larger units, hence the amount of floorspace they require far exceeds that of the clothing retailers despite having the same number of requirements. In total there is a requirement for between 1,750 sq m and 3,424 sq m of floorspace from comparison goods retailers. Not all of the retailers would actually take space in the town even if opportunities became available, because of duplication between retailers in some trade groups. Nevertheless, the analysis indicates a healthy level of demand for a town of this size.

Retailer Demand – Tring

8.11 Table 8.5 shows the total type and number of requirements for Tring. Due to its small size and surrounding competing towns, this level of demand is low, as expected. The minimum level of floorspace required is 558 sq m, the maximum is 791 sq m. The larger unit of between 326 sq m and 465 sq m is required by a restaurant operator.

Table 8.5: Retailers' Requirements for Tring

Type	Name	Minimum Size (sq m)	Maximum Size (sq m)	Date
Convenience	Aldi Stores Ltd	n/a	n/a	28/01/2005
Comparison	Cotswold Company (The)	233	326	31/01/2005
A3	Forno Vivo Ltd	326	465	22/11/2004
	Total	**558**	**791**	

Source: Focus 2005

Conclusions on Retailer Demand

8.12 A number of conclusions can be drawn from this overview of retailers' requirements within Hemel Hempstead. Three foodstore operators would be interested in expanding their retail offer. One in particular has expressed a specific interest in locating on the Civic Zone site, and we believe that at least one other, would seriously consider that opportunity. Requirements from food retailers include new superstores and store extensions, and discount supermarkets wanting to move into the town.

8.13 There are retailer requirements for premises across all sectors of comparison goods. Clothing has the highest number of requirements, whilst DIY retailers require the most floorspace.

8.14 Whilst the new Riverside Centre will be likely to accommodate many of the retailers requiring space, there will remain some unsatisfied requirements. Some of these could potentially be accommodated on the Civic Zone site in accordance with the sequential approach, if space permits.

8.15 Berkhamsted has a healthy level of requirements for its limited size, particularly with regard to clothing retailers and household goods retailers. One supermarket currently located in Berkhamsted is looking to expand its retail offer if a suitable site can be found. This illustrates that Berkhamsted is viewed as a desirable location.

8.16 Tring has a much more modest level of retailer requirements, which is to be expected for its small size and its role as serving only the day-to-day needs of local residents. One convenience store, Aldi, has requirements for all three towns, Tring may be the most appropriate place for Aldi to locate, if a site can be found as this would help to fill the gap in the market for discount convenience goods stores within Dacorum.

9 Quantitative Need for Retail Development

9.1 In this section, we examine the current retail performance of Dacorum's three town centres and out-of-centre shopping, within the study area. We have also assessed the quantitative expenditure capacity available to support further floorspace within the study area. This study therefore includes the preparation of up to date forecasts of the capacity for additional retail floorspace in the study area, which will be supportable by increases in the population and expenditure of catchment area residents and visitors. In this section, we describe our RECAP forecasting Model, and set out our forecasts of the additional retail floorspace which will be supportable by growth in available expenditure in the period up to 2021.

The Donaldsons RECAP Model

9.2 There are a number of possible approaches to forecasting the amount of additional shop floorspace supportable in any town, and the retail impact of proposed retail development. Some use driving time isochrones to define catchment areas, whilst others use some form of gravity model of retail attraction; or a crude assessment of overall market share of available expenditure, which is considered appropriate for the proposed retail development. All need an assessment of existing shopping facilities in the area, and the amount of expenditure available in the catchment area.

9.3 The effectiveness of the various forecasting methods varies considerably. Conventional gravity models base the attractiveness of different centres, and therefore the extent of their trade draw, simply on their size and accessibility. In reality, other important factors, including the type and quality of retailers, level of parking provision, and the retail environment, can also influence the trading pattern. Forecasts based on driving time isochrones to determine catchment areas rely heavily on assumptions and judgement rather than measures of the actual pattern of shopping visits from residential areas to shopping centres, foodstores and retail warehouses. Overall market share based methods are inherently unreliable because they rely on estimates derived from one location being applied to another with different catchment area characteristics; and because the result depends substantially on the assumptions about the extent of the catchment area in each location.

9.4 To overcome these and other problems of such approaches, Donaldsons has developed its new RECAP retail capacity forecasting Model. The main difference between our approach and conventional gravity models is that the RECAP Model uses the results of a specially designed household interview survey to identify the actual shopping patterns in the catchment area. By this means, it is possible to model realistically existing flows of catchment area expenditure to town centres, foodstores and retail warehouses; as the basis for predicting the existing and future capacity for further retail development.

9.5 In summary, the RECAP Model uses the results of the household interview survey as its objective measured 'baseline', using a conventional and widely accepted step by step approach, to complete the following tasks:-

- Calculate the total amount of convenience and comparison goods expenditure which is available within the eight zones comprising the catchment area;

- Allocate the available expenditure to Hemel Hempstead town centre and out of centre shops, and to Berkhamsted and Tring town centres, based on the results of the household interview survey of shopping patterns; so as to obtain estimates of current sales and forecast future sales in each;

- Compare the estimated sales in each town centre and non-central shopping with existing floorspace (and in the case of main food stores and retail warehouses, with sales based on estimated company average performance); so as to assess the current trading performance of each shopping destination, and the capacity to support further growth in floorspace;

- Assess likely changes to the existing pattern of market shares to take account of committed new development in Hemel Hempstead and competing towns, and recalculate the sales and capacity forecasts.

9.6 Because the RECAP Model is computer based and calculates all expenditure together, it is possible to explore the effects of significant new developments. Thus we have explored the implications of the committed Riverside scheme in Hemel Hempstead, and potential new retail developments on the Civic Zone site, both in the town centre; and potential new retail developments at Jarmans Field.

9.7 The RECAP Model is a very useful tool for retail planning, which avoids the potential inaccuracies arising from assumptions about existing trade draw patterns and market shares which are often inherent in other forecasting methods. It is based on forecasting methods which have been used and refined in a large number of retail studies on behalf of public sector clients. In particular, forecasts made using the method on which the RECAP Model is based have been accepted by Planning Inspectors and the Secretary of State at many Public Inquiries. The Model has been used to prepare the expenditure and retail capacity forecasts set out in this report.

9.8 It is important to remember that the RECAP Model is an exploratory tool, rather than a prescriptive mechanism. Thus, for example, in preparing forecasts for future shop floorspace capacity, the Model is usually run iteratively to explore the changes in the forecasting variables, such as in the pattern of attraction of expenditure or in sales densities, which would be necessary to support different levels of new development. Use of the Model in this way illuminates sensitivities in variables, and assists in making judgements about the realism of any given growth or impact scenario.

9.9 When using the RECAP Model capacity forecasts as a guide to future planning policy, it is also important to remember that the further ahead the forecasting date, the less certain the forecast. Thus the forecasts for 2011 are more robust than those for 2016 and 2021. In particular for these later dates, 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 those dates, if all of the forecast trends occur. For this reason we recommend that the forecasts should be reviewed and revised well before 2016 in the light of events, taking account of the effects of any development which has occurred in the meantime; for example, the proposed development referred to above. Furthermore, the long term growth in the use of internet shopping is as yet unknown (although it has to some degree been taken into account in this report), and reinforces the need to revise the forecasts of retail floorspace capacity well in advance of 2016.

9.10 The detailed RECAP Model tables are set out in Appendix 8, and this section should be read in conjunction with that Appendix.

Principal Data Inputs

Catchment Area and Household Interview Survey

9.11 The catchment area for the purposes of the retail capacity forecasts was defined by reference to postcode districts and sectors, taking account of the location of each town in Dacorum, the location of the principal competing towns, the principal road pattern, and significant topographical features. This catchment area was divided into 8 zones for the purposes of the household interview survey and subsequent forecasting. Within this area we designed and commissioned a detailed household interview survey of shopping patterns. The questionnaire and relevant results of this survey are included in Appendix 8. Interviewing and data processing was undertaken for us by Next Steps Market Research Ltd. Interviewing took place in March 2005. A random sample of 1,500 households was interviewed by telephone, of which 350 were in Catchment Zone 1 in which most of Hemel Hempstead is located. 250 interviews took place in Zone 5, in which Berkhamsted is located; and 200 in Zone 7, in which Tring is located. The other interviews were spread between the remaining zones.

9.12 The results of the survey provide a detailed picture of where the residents of the Dacorum catchment area shop for main food and top up convenience goods shopping, and for eight different categories of comparison goods shopping. They also provide some information on linked trips shopping where the primary trip generator is main food shopping; and on travel mode.

Catchment Population

9.13 Population forecasts were obtained from MapInfo as an ‘Dacorum Area Profile Report’, setting out the 2001 population of each of the eight catchment zones, together with trend based forecast populations for 2006, 2011 and 2016. To obtain the estimate for the base year of 2005, we interpolated between the 2001 and 2006 figures; and to obtain the forecasts for 2021, we extrapolated the data provided by MapInfo. The resulting catchment area population forecasts by zone are set out in RECAP Model Table 1 in Appendix 8. They show the population of the catchment area as a whole increasing from 202,693 as indicated by the Census 2001 to an estimated 209,960 in 2005, and to 232,812 by 2021. This is an increase of 10.9% over the period 2005 to 2021, or about 0.6% per annum.

Forecasting Dates

9.14 We have prepared base year estimates of retail sales as at 2005, as this was the year in which the household interview survey was undertaken. Our forecasts have been prepared for the years 2011, 2016 and 2021. This latter date has been chosen because it is the 'target' end date for the new Local Development Framework. As indicated above, the longer ahead of these forecasts should be treated as a broad guide only, and reviewed and updated well before that date.

Price Basis

9.15 All monetary values in this report are in 2001 prices, unless otherwise indicated.

Per Capita Expenditure

9.16 We obtained from MapInfo average per capita expenditure on convenience and comparison goods in the catchment area in 2001. After deducting expenditure on special forms of trading, these amount to just over £1,663.89 for convenience goods and £2,719.33 for comparison goods. These base figures are set out in RECAP Model Table 2 in Appendix 8. Table 2 indicates the breakdown of the comparison goods figure into the eight different categories of comparison goods expenditure covered by questions in the Household Interview Survey 2005.

9.17 The base figures for the year 2001 in Table 2 have been increased to allow for actual and expected growth over the forecasting period to 2021. For convenience goods, we have applied the actual growth 2001 to 2003 indicated in MapInfo Brief 04/02, followed by the MapInfo 'best fit' trend rate of 0.90% per annum, for the period 2003 to 2021. For comparison goods, we have applied the actual growth 2001 to 2003 as above, followed by the ultra long term trend rate of 3.7% per annum for the period 2003 to 2021. This is slightly above the econometric forecast of 3.4% per annum by Oxford Economic Forecasting set out in MapInfo Brief 04/02, but significantly below the long term and medium trend rates of growth of 4.7% pa and 5.2% pa respectively.

9.18 We consider that the ultra-long term trend based growth rate of 3.7% pa realistically takes account of the higher growth in 2004, the current downturn in growth of retail expenditure, and the medium term economic outlook. It is significantly below the historically very high rates of growth of the last few years, which are exceptional in relation to the trend. It would be unrealistic to assume that the recent high level of growth will continue annually throughout the 16 year forecasting period. The ultra long term trend spans the period 1964 to 2003, thus covering several economic cycles. Of course it does not take full account of the potential growth in on line shopping via the internet or interactive digital TV. Whilst this is currently growing rapidly, it still accounts for only a very small proportion of total retail spending; and is focused mainly on particular retail categories eg. books, music, computer products. To assume an annualised average of 3.7% per annum over the entire forecasting period when growth for the last few years has been significantly above this level, therefore makes an implicit allowance for further growth in such non traditional forms of shopping. In any event, periodic review of the forecasts as development proceeds will enable the assumed growth rates to be adjusted as necessary in the light of actual growth, and the forecasts revised accordingly.

9.19 The combined effect of the forecast growth in population and in per capita expenditure is that we expect total catchment expenditure on convenience goods (set out in Table 3 in Appendix 8) to increase by about £103.7m (28.0%) over the period 2005 to 2021; and total catchment area expenditure on comparison goods to increase by about £684.6m (98.3%) over the same period. This compares with growth in total catchment area population of 10.9% over the period. Thus just under one third of the growth in catchment area expenditure on convenience goods is due to expected growth in population; but 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 fairly insensitive to the population growth assumptions, and much more sensitive to the assumptions about growth in per capita expenditure, particularly in the later part of the forecasting period.

Shopping Patterns in the Catchment Area

9.20 As indicated above, in 2005 we designed and commissioned a new household interview survey of shopping patterns in the Dacorum catchment area. We have included the unweighted tables of results in Appendix 8. We have used the results as a key input to our RECAP Forecasting Model in Appendix 8. Thus for Hemel Hempstead for example, in Table 5 we have combined the results of the question about main food shopping with those of the question about top up food and convenience goods shopping, to provide a weighted average market share of total convenience goods expenditure in each zone which is attracted to main foodstores and other convenience goods shops in Hemel Hempstead town centre. These weighted averages are then rounded to the nearest integer and used (with an adjustment described below) in Table 7 to indicate the pattern of attraction of convenience goods expenditure to shops and stores in Hemel Hempstead town centre. A similar approach has been used for the main foodstores in Berkhamsted and Tring, in Tables 22 and 24 (Berkhamsted), and 30 and 32 (Tring), in Appendix 8.

9.21 In the case of comparison goods, for Hemel Hempstead town centre, for example, we have applied the results of the household interview survey for each of the eight categories of comparison goods, weighting the market shares for each according to per capita expenditure on each category (as indicated by MapInfo); to provide a weighted average market share of all comparison goods expenditure which is attracted from each zone by shops and stores in the town centre. The market shares for each individual goods category and the weighted averages are set out in Table 6; the final column (weighted average), of which is rounded to the nearest integer, and applied (with the adjustment described below) in Table 7 to indicate the market shares of all comparison goods expenditure attracted from each zone by shops in Hemel Hempstead town centre. Similar tables apply to the other comparison goods shopping destinations in Dacorum, ie Tables 14 and 15 for non-central superstores and retail warehouses in Hemel Hempstead, tables 23 and 24 for Berkhamsted town centre, and tables 31 and 32 for Tring town centre.

9.22 The RECAP Model Tables show that shops in each of the three towns attract higher market shares of catchment area expenditure from the catchment zones in which they are located, than from other zones. This is not surprising because the former zones are the closest to each town. Of the remaining zones, much of Zone 2 is closer to the larger centre of Watford than to Hemel Hempstead; whilst Zone 8 is close to Aylesbury. Watford, St Albans, and Luton are all easily accessible from Zone 4, whilst Amersham is accessible from Zone 6. The 'core' catchment zones from which the three Dacorum towns attract the highest market shares of catchment area expenditure, are Zones 1, 3, 5 and 7. The remaining zones provide relatively lower market shares, particularly for comparison goods expenditure.

9.23 Using the results of the household interview survey for Hemel Hempstead town centre in the RECAP Model without adjustment would result in an unrealistically high sales density for the town centre, which would be substantially above the sales densities which we have measured in other town centres of similar size. There is an approximate correlation between centre size and average sales density, with larger town centres generally having higher sales densities than smaller centres. This is the main reason why shop rental values are higher in larger centres than in smaller. To arrive at average sales densities for Hemel Hempstead town centre which are broadly in line with those we would expect for a town centre of this size, and in line with current rental values, therefore, we have reduced the market shares indicated by the household interview survey by a factor of 65%. Thus the market shares in Table 7 in Appendix 8 are 65% of the weighted average market shares indicated by the household interview survey in Tables 5 and 6.

9.24 For the non-central food stores and retail warehouses in Hemel Hempstead, and for Berkhamsted and Tring town centres, use of the household interview survey results without adjustment results in realistic sales densities. The adjustment factor in these cases was therefore 100% (ie no adjustment was made to the weighted average market shares indicated by the survey).

Visitor Expenditure

9.25 We have not allowed for any expenditure in the three town centres and non-central shopping by visitors from outside the catchment area covered by the household interview survey. This is because the three towns are not noted destinations for tourists and other visitors. Whilst we would expect some such expenditure by visitors to occur, we would also expect some expenditure by catchment area residents in other locations outside the catchment area, in addition to that which is indicated by the results of the household interview survey. To a substantial degree, this additional outflowing expenditure would be likely to offset any inflowing visitor expenditure.

Existing Shop Floorspace

9.26 For main food stores in each town centre, and the non-central main food stores in Hemel Hempstead, we have used floorspace data published by the Institute of Grocery Distribution (IGD), supplemented where necessary with information from Experian Goad. Details of these shops and stores in Hemel Hempstead are set out in Table 10 (town centre) and 18 (non-central), Table 27 (Berkhamsted), and Table 35 (Tring). In the case of Tring, we have included the Tesco store with the shops and stores in the town centre for simplicity of forecasting, although the Tesco store is not within the town centre in PPS6 terms.

9.27 For comparison goods floorspace in each town centre, we have used the results of the most recent Experian Goad survey. To this we have added the net comparison good sales area in the relevant main food stores. The resulting total comparison goods shop floorspace in Hemel Hempstead town centre is estimated as 32,470 sq m net, in Berkhamsted as 7,220 sq m net, and in Tring as 4,003 sq m net. These figures are included in RECAP Model Tables 12, 29 and 37 respectively in Appendix 8.

9.28 In the case of the retail warehouses in Hemel Hempstead, we have used floorspace data provided by the Borough Council. We have applied a net to gross ratio of 85% to calculate the net sales areas (totalling 21,244 sq m) in Table 21.

Sales Densities for Main Food Shops and Retail Warehouses

9.29 For the existing main food stores in each town centre, and the non-central stores in Hemel Hempstead, we have applied estimated company average space allocations and convenience goods sales densities based on information published by Verdict Research. These are set out in Tables 10 and 18 for Hemel Hempstead town centre and non-central stores respectively, Table 27 for Berkhamsted and Table 35 for Tring.

9.30 In the case of retail warehouses in Hemel Hempstead, we have used estimated company average sales densities obtained from The UK Retail Rankings, published by Mintel. These are set out in Table 19.

Development Scenarios Assessed

9.31 We have assessed two scenarios for development as follows:

Scenario 1 – the 'baseline' scenario, which assumes that there will be no change in the market shares of available expenditure attracted from the catchment area through the period to 2021.

Scenario 2 – committed Riverside development in Hemel Hempstead town centre, potential new food superstore on the Civic Zone site in the town centre, and committed retail warehouse development at Jarman Park. In this scenario, we adjust the future patterns of market shares of both convenience and comparison goods expenditure attracted to the town centre and non-central retail warehouses, to test the implications of these new retail developments. We also take account of expected new developments in competing towns, in particular the proposed redevelopment of Charter Place in Watford, and proposed town centre development in Aylesbury. In Scenario 2, we also take account of the likely impact of new developments in Hemel Hempstead on Berkhamsted and Tring town centres.

9.32 Scenario 1 is somewhat artificial, in that it makes no explicit allowances for the attractiveness of new retail development. It is therefore a worst case scenario, which assumes that new development is unable to achieve increased market shares in the face of competition from other locations outside the study area. However, it sets a useful baseline, with which Scenario 2, and any future retail development scenarios, can be compared. Scenario 2 is more realistic in that it explores the implications for shopping patterns of committed and potential new retail developments; and represents our current best estimate of likely future retail performance of Hemel Hempstead in the study area.

Format of the RECAP Model Tables

9.33 The detailed RECAP Model Tables for both scenarios are set out in Appendix 8. Table 1 sets out the population forecast for each of the 8 catchment zones. Table 2 indicates per capita expenditure, and growth in that expenditure. Table 3 is total catchment area expenditure by zone for convenience and comparison goods over the period 2005 to 2021. Table 4 indicates total catchment area expenditure by zone in 2005 on each of the 8 categories of comparison goods.

9.34 In Scenario 1, for Hemel Hempstead town centre, Tables 5 and 6 set out the pattern of weighted average market shares of catchment area convenience and comparison goods expenditure respectively, which is attracted from the catchment area to that destination. The market shares in Table 7 are based on the detailed results by goods category obtained from the household interview survey, and set out in Tables 5 for convenience goods and 6 for comparison goods – after application of the 65% survey adjustment factor described above. Table 8 is the product of Tables 4 and 6. It shows the attraction of expenditure on each of the 8 comparison goods categories by the town centre (taking account of the 65% survey adjustment factor); together with the resulting overall market shares of such expenditure currently attracted by the town centre. Table 9 is the product of Table 3 (catchment area expenditure) and Table 7 (adjusted market shares). It indicates the convenience and comparison goods expenditure attracted from each catchment zone by Hemel Hempstead town centre at each date. Table 10 sets out the sales potential of the existing main food stores at estimated company average levels. Table 11 indicates the sales potential of the committed Riverside development in Hemel Hempstead town centre.

9.35 Tables 12 compares the expenditure attracted by Hemel Hempstead town centre and hence sales, with existing shop floorspace and the sales potential of the committed Riverside scheme, and indicates the resulting capacity for additional shop floorspace. The top line of Table 12 (spending by catchment area residents) is taken from the bottom line of Table 9. As appropriate, an allowance is made for the average sales density of the existing shops to increase in real terms, following the long term trend towards higher town centre sales densities.

9.36 A similar arrangement of tables for Scenario 1 applies to non-central shops and stores in Hemel Hempstead (Tables 13 to 21 in Appendix 8), Berkhamsted town centre (Tables 22 to 29), and Tring town centre (Tables 30 to 37).

9.37 The Tables for Scenario 2 are simpler. Thus for Hemel Hempstead town centre, Table 38 indicates the revised pattern of market shares of convenience and comparison goods expenditure attracted, taking account of the committed and likely developments outlined above (and indicated in the table heading). It shows the increases in market shares which we expect the Riverside scheme to effect by 2011, allowing also for the effects of new developments in competing towns. Table 39 is the product of Table 3 and Table 38, and indicates the revised amounts of expenditure attracted to Hemel Hempstead town centre at each date. Table 40 compares this with existing shop floorspace and the sales capacity of the Riverside scheme (in a similar way to Table 12 in Scenario 1) to indicate the revised capacity for additional shop floorspace in the town centre.

9.38 A similar arrangement of tables for Scenario 2 applies to non-central shops and stores in Hemel Hempstead (Tables 41 to 43 in Appendix 8), Berkhamsted town centre (Tables 44 to 46), and Tring town centre (Tables 47 to 49). The latter two sets of tables show the effects which we expect from the Riverside scheme in Hemel Hempstead town centre, and likely new retail developments elsewhere.

9.39 In Scenario 2, the adjustments in market shares which we have made for 2011, 2016 and 2021 are our professional judgements, based on the results of the household interview survey, the local retailing geography and our experience elsewhere. However, when the Riverside scheme has been fully open for at least one year, it would be desirable to undertake a new household interview survey to measure its actual effects; and then to update the RECAP Model forecasts based on the results. This would enable future retail planning to take account of the actual effects of this large scheme, rather than just the predicted effects, as in this report. It would also enable the effects of the committed retail warehouse development at Jarman Park to be measured and taken into account.

The RECAP Model Forecasts

9.40 In the remainder of this section, we set out our retail capacity forecasts for the three towns, and discuss the relationship between the existing centres and potential new retail developments. The forecasts are summarised in Table 9.1. We also comment on the implications for future development strategy. In setting out our forecasts, we distinguish between convenience goods and comparison goods, defined as follows:

- Convenience goods: Food, alcoholic drink, tobacco products, newspapers and periodicals, non-durable 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.

Table 9.1

Summary of Retail Capacity Forecasts

Goods/Scenario/Location	2011 (sq m net)	2016 (sq m net)	2021 (sq m net)	RECAP Model Table (Appendix 9)
Convenience Goods:				
Scenario 1:				
Hemel Hempstead Town Centre	1,400	1,750	2,100	12
Hemel Hempstead Non-Central	1,800	2,600	3,400	21
Berkhamsted	-250	0	250	29
Tring	400	550	700	37
Scenario 2:				
Hemel Hempstead Town Centre	2,300	2,700	3,150	40
Hemel Hempstead Non-Central	2,550	3,400	4,250	43
Berkhamsted	-250	0	250	46
Tring	400	550	700	49
Comparison Goods:				
Scenario 1:				
Hemel Hempstead Town Centre	-5,100	3,700	14,050	12
Hemel Hempstead Non-Central	-2,250	1,850	6,550	21
Berkhamsted	1,850	3,650	5,750	29
Tring	1,050	2,050	3,250	37
Scenario 2:				
Hemel Hempstead Town Centre	1,450	11,450	23,250	40
Hemel Hempstead Non-Central	7,750	13,450	19,850	43
Berkhamsted	1,250	3,000	4,950	46
Tring	700	1,700	2,800	49

Source: RECAP Model Tables in Appendix 8 as indicated, rounded to the nearest 50 sq m net.

Notes: The forecasts in Table 9.1 are cumulative, ie. The forecasts for each date include the forecasts for the previous dates and are not additional to those earlier forecasts.

For comparison goods floorspace in Hemel Hempstead town centre, the forecasts are for new floorspace additional to Riverside Centre.

For Hemel Hempstead non-central, committed new retail warehouses at Jarman Park (expected to be about 5,525 sq m net) should be subtracted from the forecasts to arrive at the need for further comparison goods floorspace.

Convenience Goods

Hemel Hempstead

9.41 Scenario 1, RECAP Model Table 12 shows that in 2005, the main foodstores and other convenience goods shops in Hemel Hempstead were achieving combined sales of £46.1m; at a combined average sales density of £13,454 per sq m net. Table 10 shows that based on estimated 2002/3 company average sales densities, the combined sales density of these stores in 2005 was £9,827 per sq m net. Thus, these stores as a group are estimated to be trading significantly above the level based on estimated company averages.

9.42 In Table 12, we have allowed for sales in the existing convenience goods shops as a group, to fall to the level based on estimated 2002/3 company averages. This is a conventional approach in retail studies of this type. On this basis, summary Table 9.1 above shows that there would be sufficient expenditure to support up to about 1,400 sq m net additional convenience goods floorspace by 2011, rising to about 1,750 sq m net by 2016, and further to about 2,100 sq m net by 2021 if forecast trends occur. These forecasts are on the basis that such new floorspace is provided in the form of a modern superstore. If provided in a different format, such as a combination of a discount supermarket and a town centre format supermarket, the capacity for additional floorspace would be somewhat greater, since the former type of store achieves much lower sales densities than superstores.

9.43 Scenario 1, Table 21 shows that in 2005, the main non-central foodstores in Hemel Hempstead were achieving combined sales of £104.7m; at a combined average sales density of £11,837 per sq m net. This is somewhat above the level based on estimated 2002/3 company average sales densities of £10,562 per sq m net, indicated in Table 18. Thus, these stores as a group are estimated to be trading somewhat above the level based on estimated company averages.

9.44 In Table 21, we have again allowed for sales in the existing convenience goods shops as a group, to fall to the level based on estimated 2002/3 company averages. On this basis, summary Table 9.1 above shows that there would be sufficient expenditure to support up to about 1,800 sq m net additional convenience goods floorspace by 2011, rising to about 2,600 sq m net by 2016, and further to about 3,400 sq m net by 2021 if forecast trends occur. These forecasts are also on the basis that such new floorspace is provided in the form of a modern superstore. If provided in a different format, such as a combination of one or more discount supermarkets and an extension to an existing superstore, for example, the capacity for additional floorspace would be somewhat greater, since discount supermarkets achieve much lower sales densities than superstores.

9.45 In deciding how these forecast needs should be accommodated, the sequential approach should be applied as indicated in PPS6. This gives priority to town centre and edge of centre locations over out-of-centre locations. Thus some or all of the forecast capacity for additional non-central floorspace should be accommodated by means of town centre or edge-of-centre development, if a suitable site or sites exist or could be assembled. We comment further on this later in the report. However, when the forecast capacity for town centre and non-central floorspace is added together, summary Table 9.1 shows that by about 2011, with no increases in market shares of expenditure attraced from the catchment area, there would be capacity for one new full sized full range food superstore in the town. Under the sequential approach, this could be located on the Civic Zone site. In the event that such a store was occupied by Asda, relocating from its existing small and poorly located store, there would be capacity for such a superstore on the Civic Zone site by 2011, and for another full sized superstore elsewhere in the town by soon after 2016, with no increases in market shares.

9.46 Under Scenario 2, we make the realistic assumption that a modern food superstore and store extensions and/or discount supermarkets would be able to increase the market share of expenditure attracted from the catchment area, and thus become partially self-justifying in terms of the attraction of expenditure. We have assumed (for the purposes of capacity forecasting only) that such a store would be outside the town centre – although its actual location would be subject to the sequential approach. On the basis of the increases in market shares of expenditure attracted from each zone indicated in Tables 38 (town centre) and 41 (non-central), the resulting overall increase in market share from the catchment area as a whole attracted by the town centre and non-central locations combined would be 5% (Tables 40 and 43).

9.47 Summary Table 9.1 shows that this would result in significant increases in capacity. In Scenario 2, we forecast capacity for additional town centre floorspace of up to about 2,300 sq m net by 2011, rising to about 2,700 sq m net by 2016, and further to about 3,150 sq m net by 2021. We also forecast capacity for additional non-central floorspace of up to about 2,550 sq m net in 2011, rising to about 3,400 sq m net by 2016, and to about 4,250 sq m net by 2021, if forecast trends occur. These forecasts are again on the basis that the additional floorspace would be provided in the form of modern food superstore floorspace, trading at a 'generic' average for such floorspace of £12,000 per sq m. Some operators trade at above this figure and some below, so the identity of the operator would alter the forecast capacity slightly. In the event that some of the additional floorspace is provided in the form of discount supermarkets, the capacity would be greater, because of the lower sales densities achieved by such retailers, (although not pro rata with the reduction in sales density, because discount supermarkets would be likely to attract smaller increases in market shares of catchment area expenditure than food superstores).

9.48 It is important to note that the convenience goods retail capacity forecasts set out in Table 9.1 are theoretical maxima. This is because they are based on the assumption that sales densities in the existing main foodstores will all fall to currently estimated company average levels, as a result of the competition from new developments. However, an average is only an average; and the more attractive stores will continue to trade at levels above the company average, whilst others my trade successful below the average. In addition, company average sales densities may well rise as food retailers become more efficient. It would therefore not be realistic to plan on the basis that such an across the board reduction in sales densities should or would occur.

9.49 In practice, and taking account of the potential for new foods stores to increase market shares, we consider that, when the capacity forecasts for the town centre and the non-central locations are combined, there would be practical capacity for a new full sized food superstore in the town centre on the existing or expanded Civic Zone site by 2011. If this new store is operated by Asda, with the existing Asda store going out of food retail use, there would also be capacity for additional new food store elsewhere in the town. In terms of retail capacity, this could take the form of one or two discount supermarkets early in the period 2006 to 2011, potentially followed by an additional superstore by about 2016. If the new superstore on the Civic Zone site is operated by another retailer, and Asda remains on its present town centre site, there would only be sufficient capacity for two or three discount supermarkets early in the period 2006 to 2011; together with some limited additional floorspace later in the forecasting period, such as modest extensions to existing food stores by 2016, or another food superstore by about 2021. Since there are no discount supermarkets in Hemel Hempstead at present, the overall food retail offer in the town would become more complete if some were developed at an early stage, than if a second new superstore was permitted (in addition to a new superstore on the Civic Zone site).

Berkhamsted

9.50 RECAP Model Table 29 shows that the existing food and convenience goods shops were estimated to be achieving a combined average sales density of about £10,146 per sq m net in 2005. This compares with the level based on estimated 2002/3 company average levels of about £12,093 per sq m net. Thus the results of the household interview survey show that these shops as a group are trading at somewhat below the level based on estimated company averages. On this basis, after allowing for their sales to rise to a more realistic level as they have the capacity to absorb more trade, there would be no capacity for any additional convenience goods floorspace until near the end of the forecasting period. This does not mean that no more floorspace should be permitted if a retailer wished to expand in the town centre or open a new town centre store, but simply that there is no forecast need for any more floorspace under Scenario 1.

9.51 We have not modelled a Scenario 2 for convenience goods in Berkhamsted. This is because the results of Scenario 1 indicate that massive increases in market shares would be needed to provide support for any substantial additional food store floorspace in the town centre. In view of the likely increasing attractiveness of Hemel Hempstead for food shopping as a result of a new superstore on the Civic Zone site, and other new food store developments, we consider that such increases would not be realistic or achievable. However, exploratory runs of the RECAP Model suggest that more modest and probably achievable increases in market share would be needed to support a new discount supermarket, which would complement the existing stores.

Tring

9.52 Table 9.1 shows that there will be theoretical forecast maximum capacity for about 400 sq m net additional convenience goods floorspace by 2011, rising to 550 sq m net by 2016, and further to about 700 sq m net by 2021 (after allowing sales densities in the existing stores as a group to fall to the level based on estimated current company averages). These forecasts are on the basis that new floorspace would be provided in the form of modern superstore floorspace trading at a ‘generic’ average of £12,000 per sq m net. This forecast capacity would not be sufficient to support such a new food superstore. However, even under Scenario 1 in which there is no increase in market shares of expenditure attracted from the catchment area, there would be sufficient growth in expenditure to support a new discount supermarket (which would trade at a lower sales density of around £4,500 per sq m net) of up to about 750 sq m net convenience goods floorspace by about 2009 (interpolating between the 2006 and 2011 forecasts). Alternatively, there would be sufficient expenditure to support a realistic extension of the existing town centre Budgens store by soon after 2006 – followed by a new discount supermarket later in the forecasting period, such as by about 2011. If a new discount supermarket could be accommodated in the town centre, it would complement the existing main food stores, and meet a qualitative need for this form of shopping in Tring. However, we do not consider that this need is so pressing that it should override other planning considerations, such as conservation constraints in the town centre, or result in loss of the Tring Market.

9.53 We have not run a separate Scenario 2 with increased market shares, for the same reason as in Berkhamsted. Very substantial increases in market shares would be needed to justify major new convenience goods development. We do not consider that this would be realistic or achievable in Tring, which is a small town and somewhat overshadowed by Aylesbury in retail terms.

Comparison Goods

Hemel Hempstead

9.54 In Appendix 8, Scenario 1, Table 12 shows that Hemel Hempstead is estimated to be achieving an average sales density for comparison goods in 2005 of about £6,130 per sq m net. Based on our retail studies of a number of other town centres, we consider that this is a good sales density for a centre the size and nature of Hemel Hempstead; and indicates that the town centre is trading well for its size. It reflects the fact that per capita expenditure has been growing fast in recent years, but there has been no commensurate increase in comparison goods shop floorspace. The Riverside Centre which opened very recently, will substantially rectify this deficiency. We have allowed for it’s likely sales capacity in RECAP Model Tables 11 and 12. In our forecasts, we have also allowed for sales in the existing shops and in Riverside Centre to increase at 1% per annum in real terms, before forecasting capacity for additional comparison goods floorspace as a result of growth in catchment area population and per capita expenditure.

9.55 On this basis, Table 9.1 shows that in Scenario 1 (ie. no increase in market shares), capacity for additional comparison goods floorspace in Hemel Hempstead town centre will not start to arise until about 2014. Indeed, without market share increases, Riverside Centre itself will not be fully supportable by the time it opens, and would not become fully supported (in addition to full support for the existing shops) until about 2014.

9.56 Scenario 2 is based on the much more realistic assumption that the town centre’s market share will increase from 2006 onwards, as a result of the Riverside Centre. These increases in market share from each Zone are shown in RECAP Model Table 38. As with the market share increases for convenience goods, the increases indicated in Table 38 are our experienced professional judgements. They would result in an overall increase in catchment area expenditure attracted from 29% at present to 32% by 2011. In Scenario 2, we have again allowed for sales in the existing shops and Riverside Centre to increase at 1% per annum, before forecasting capacity for additional retail floorspace in Hemel Hempstead town centre.

9.57 In Scenario 2, Riverside Centre will not quite be fully supportable by available expenditure by the date it opens. However, the shortfall is likely to be marginal. In any event, new shopping centres take time to establish a stable pattern of trade, and for the inevitable transitional effects on the existing shops to settle down. The Scenario 2 forecasts show that by the time this has happened, Riverside Centre and the existing shops and stores will be virtually fully supported by growth in expenditure, if forecast trends occur. In the short term until that settled position has been reached, sales in the existing shops and in Riverside Centre itself may not achieve the forecast increases of 1% pa.

9.58 In our market share increases from 2011, we have also allowed for the effects of expected new town centre developments in Watford and Aylesbury, and to a lesser extent committed new retail warehouses at Jarman Park in Hemel Hempstead. We expect the overall market share of catchment area comparison goods expenditure to rise above 32% in 2006 when Riverside Centre fully opens, before settling back to 32% from 2011, as a result of these competing developments.

9.59 The new Riverside Centre is a substantial scheme, which will increase the net sales area for comparison goods in the town centre by almost 50%. Whilst it will meet an existing accumulated need for more floorspace, it will take time to establish a mature pattern of trade. This means that there will not be any substantial capacity for further comparison goods shop floorspace in the town centre until late in the period 2011 to 2016, followed by further growth to 2021. However, we consider that there will be capacity for the additional comparison goods floorspace likely to be in a new food and non-food superstore on the Civic Zone site, as indicated by the forecast capacity for additional non-central comparison goods shop floorspace. We discuss this further below.

9.60 Table 9.1 shows that under Scenario 1, ie no increases in the market shares of catchment area expenditure attracted to non-central food stores and retail warehouses, there would not be capacity for any additional such development until close to 2016. This is because the limited existing provision of retail warehouses is attracting low market shares, and is calculated to be currently trading at below the level based on estimated company averages. (£2,623 per sq m net overall in 2005, compared with £3,219 per sq m net at 2002/3 estimated company average levels). Consequently there is potential for the existing stores to absorb significant increases in sales, before a need for more floorspace arises. We have therefore allowed for sales densities to grow to estimated company average levels, and thereafter at 1% pa, before forecasting a need for more floorspace.

9.61 The adopted Local Plan allocates the site at Jarman Park for new retail warehouse development. As a Local Plan commitment, therefore, we have taken account in Scenario 2 of the potential for such a development to increase the market shares of catchment area expenditure attracted to non-central stores in Hemel Hempstead. The market share increases which we expect in Scenario 2, are set out in RECAP Model Table 41. They would result in an overall increase in market shares of comparison goods expenditure attracted from 8% at present to 11% by 2011, (after account also of new developments in competing towns). We believe that this would be a realistic increase, in view of the limited provision of retail warehouses in the town at present.

9.62 On this basis, Table 9.1 shows that there would be capacity by 2011 for about 7,750 sq m net additional retail warehouse floorspace, rising to about 13,450 sq m net by 2016, and further to about 19,850 sq m net by 2021. We understand that the proposed new retail warehouses at Jarman Park will be unlikely to open before late 2006. Thus by the time they have established a stable pattern of trade in about 2007/8, there would be sufficient expenditure to support the 5,525 sq m net (approx 6,500 sq m gross) stemming from the current proposal site. This is on the assumption that the new retail warehouses are granted permission subject to a bulky goods condition, which prevents the sale of clothing and footwear and other non-bulky goods in which the town centre specialises.

9.63 Table 9.1 shows that after completion of the retail warehouses at Jarman Park, capacity for additional such development would continue to grow throughout the remainder of the forecasting period. Under the sequential approach, however, the highest priority locations for further comparison goods retail development would be Hemel Hempstead town centre, followed by sites on the edge of the town centre. The Civic Zone site is an edge-of-centre site, and would therefore be preferable to further out-of-centre retail warehouses or superstore extensions, to accommodate this growing need for more comparison goods floorspace (which would not necessarily have to be developed in the format of retail warehouses). When the forecast capacity for further town centre comparison goods floorspace is added to the forecast capacity for further non-central floorspace, the resulting capacity would be sufficient to support the comparison goods element of a new food and non-food superstore on the Civic Zone site, by about 2011, if forecast trends are realised. If such a new store was to be operated by Asda relocating, with its existing store being redeveloped for other uses, there would be capacity somewhat earlier than if the new store was operated by another retailer.

9.64 In the longer term beyond 2016, we expect capacity to grow for further phase of town centre development. As discussed below, we consider there are potential opportunities for such development at the south end of Marlowes, close to Riverside Centre. Because of this location close to existing major prime retail attractions, new retail floorspace there would not have to be large scale and strongly anchored, to succeed. It could therefore potentially be provided in one or more moderate scale schemes. The retail capacity forecasts show that there should be sufficient capacity for such development from about 2016 onwards (if out-of-centre retail development is restricted), although this would have to be assessed and tested much nearer to that date, in the light of the circumstances at that time.

Berkhamsted

9.65 Table 9.1 shows that under Scenario 1, we forecast capacity for about 1,850 sq m net additional comparison goods floorspace by 2011, rising to about 3,650 sq m net by 2016, and further to about 5,750 sq m net by 2021. Under Scenario 2, forecast capacity is less, with capacity of about 1,250 sq m net by 2011, rising to about 3,000 sq m net by 2016, and further to about 4,950 sq m net by 2021. The reductions are due to the likely impact of Riverside Centre and new retail warehouses at Jarman Park in Hemel Hempstead, on Berkhamsted town centre. Thus the increasing market shares of catchment area expenditure attracted by Hemel Hemstead are likely to be partly at the expense of market shares attracted to Berkhamsted – although not to a great degree.

9.66 In practice, this forecast capacity for new floorspace in Berkhamsted will not be sufficient to support any substantial new comparison goods development there. They would be sufficient to support the comparison goods element of a new food store on the Water Lane site, for example, together with some new shops linking it to High Street. Otherwise, they would support small scale infill developments, changes of use, and extensions to existing buildings, as incremental developments over time. Such changes would be likely to improve the retail attractiveness of the town centre to a modest degree, and should be supported in the probable absence of a single larger scale development.

Tring

9.67 Under Scenario 1, we forecast capacity for about 1,050 sq m net additional comparison goods floorspace by 2011, rising to about 2,050 sq m net by 2016, and further to about 3,250 sq m net by 2021. As with Berkhamsted, the capacity forecasts are slightly lower under Scenario 2, because of the effects of Riverside Centre on Tring town centre. Under Scenario 2, there would be capacity for about 700 sq m net by 2011, rising to about 1,700 sq m net by 2016, and to about 2,800 sq m net by 2021.

9.68 These capacity forecasts are somewhat theoretical, in that they would not be sufficient to support development on the scale which would probably be needed for financial viability. We consider that this is realistic in commercial development terms, in view of the low retail property values in the town centre. As with convenience goods, however, this does not mean that no such development should be permitted if a retailer or retailers show interest in expanding in or moving into the centre, provided that such developments would be in scale with the local role and function of the centre. The forecast capacity would be sufficient to support the comparison goods element of a new discount supermarket, for example, or small scale incremental developments and changes of use, such as by way of improvement of Dolphin Square.

Local Centres in Dacorum

9.69 We have not modelled expenditure attracted to the local centres in the Borough, because these are too small to show up in the results of the household interview survey of shopping patterns. They are mainly used for day-today ‘top-up’ shopping, and so are not mentioned by people responding to questions about where they do most of their shopping for each category of goods. The results of the household interview survey (used in the RECAP Model) show that substantially less than 100% of the expenditure in each catchment zone is attracted to the three town centres and out-of-centre shopping in the Borough. The remainder is attracted to shopping destinations outside the Borough, and to the local shopping centres in the Borough. This latter element of catchment area expenditure is, of course, also growing as a result of growth in population and expenditure. Although the expenditure attracted by the local centres is not included in the RECAP Model (apart from convenience goods expenditure attracted by any main food stores in these centres), therefore, the Model implicitly allows for growth in their expenditure and sales. This should enable them to continue to provide local top-up shopping facilities in the long term.

9.70 The local centres at Markyate, Kings Langley and Bovingdon are small centres in free-standing villages in the Borough. As such, they perform an important role in meeting walk-in and other local top-up shopping needs. It will be important to sustainability and to the community life of these villages, that they are maintained and enhanced as local village centres, as far as possible. This should include supporting any new retail development which is in scale with their role and function and the local catchment areas which they serve (subject also to other relevant local planning considerations).

9.71 The local centres within Hemel Hempstead itself also serve local walk-in and top-up shopping needs. Some are 'anchored' by a small supermarket or larger food store. Any such main food stores have been included in our RECAP Model forecasts. We consider that if suitable sites can be identified, the potential new discount supermarkets discussed above should be located in or on the edge of the local centres in the town, in preference to out-of-centre locations.

9.72 We have identified a need for more convenience goods floorspace in Hemel Hempstead, and suggested that in addition to a new food/non-food superstore on the Civic Zone site, this need would best be met by the development of a small number of discount supermarkets in the town. As indicated above, these should be located in or on the edge of existing local centres, in preference to out-of-centre locations.

9.73 A possible further location which should be seriously considered by the Council is in north-east Hemel Hempstead. This area, centred on Maylands Avenue, comprises the largest employment area in the town, yet lacks a local shopping and services centre to provide for the needs of the large working population in the area. We consider that there would be benefits to the employment area of developing a new local centre for the area. To succeed commercially, such a new centre would probably have to be anchored by a new food store, such as one of the suggested discount supermarkets. We therefore consider that a site should be identified which is reasonably central to and accessible from the employment area; and is also accessible by car and public transport from nearby residential areas. Such a site should be capable of accommodating a discount supermarket and some additional small shop units for other retailers, and service businesses such as cafes, hairdresser, dry cleaner, post office. There is sufficient forecast capacity to enable such a new local centre to be developed within the next few years. It would therefore help to meet the need which we have identified for new discount supermarkets in Hemel Hempstead.

9.74 Jarman Park is currently designated as a local centre in the adopted Local Plan. However, the results of the household interview survey clearly show that it is functioning as an out-of-centre food superstore and retail/leisure park, attracting expenditure from the whole of Hemel Hempstead and beyond. It is not well related to the nearby housing areas, being located on one of the major roads into the town from the M1 motorway. The survey results show that it is attracting very limited local 'top-up' convenience goods expenditure. For example, Tesco is attracting only 8.3% of such expenditure from Catchment Zone 1 in which the store is located. A substantial part of this is likely to be from car drivers passing the site and stopping for small purchases. This compares with 57.1% of top-up convenience goods expenditure in Zone 1 being attracted by local convenience shops in the town. We therefore consider that the designation of Jarman Park as a local centre is no longer realistic in view of its role and function. We suggest that it should not be so designated in the new Local Development Framework.

Comparison Goods Retail Sector Analysis

Hemel Hempstead

9.75 To assist with assessing the need for additional retail floorspace in the three towns, we have undertaken an analysis of the market shares of catchment area expenditure on each of the eight sub-categories of comparison goods, which each shopping destination is attracting from the catchment area in 2005. RECAP Model Table 4 in Appendix 8 sets out the available catchment area expenditure on each of the eight comparison goods categories. Tables 6 and 14 indicate the pattern of market shares of such goods attracted from the catchment area by Hemel Hempstead town centre, and by retail warehouses and non-central food stores, respectively. The product of these tables with Table 4 is set out in Tables 8 and 16. These latter tables also indicate the overall market share of expenditure on each comparison goods sub-category, which is attracted by each shopping destination.

9.76 Table 8 shows that there is little variation between the market shares attracted by Hemel Hempstead town centre for each of the eight comparison goods categories. The highest is chemists', medical and beauty products (33%), and the lowest, furniture and floorcoverings (25%). The 'bulky' goods categories are the lowest, and the non-bulky goods the highest, reflecting the effects of the retail warehouses in attracting expenditure in the former categories. This effect appears in Table 16, which shows the retail warehouses and non-central food stores combined to be attracting between 4% of catchment area expenditure on chemists', medical and beauty products, rising to 15% for hardware and DIY goods, etc.

9.77 When the market shares attracted by the town centre are combined with those attracted by retail warehouses and non-central superstores, the overall market shares attracted by the town as a whole vary from 35% to 41%. This narrow variation shows that there are no conspicuous weaknesses in the provision of shops and stores for any individual expenditure category. However the low market shares overall show that there is substantial leakage of comparison goods expenditure from the catchment area to other shopping destinations.

Riverside Centre and proposed new retail warehouses at Jarman Park, followed in due course by new retail development on the Civic Zone site, will help to reduce this outflow.

Berkhamsted

9.78 Similar RECAP Model tables apply to Berkhamsted (Tables 23 and 25). Table 25 shows that Berkhamsted is attracting low market shares in each comparison goods category, varying from 4% (audio-visual equipment) to 8% (chemists', medical and beauty products). These market shares are what we would expect for a small town centre of this nature, and do not indicate any conspicuous deficiencies in the provision of comparison goods shops.

Tring

9.79 For Tring the relevant RECAP Model tables in Appendix 8 are Tables 31 and 33. Table 33 indicates market shares varying between 2% and 4%. Again, such market shares are typical of very small town centres; and do not indicate any substantial deficiencies within the limitations of a small centre overshadowed by much larger centres within easy reach.

Use and Review of the Forecasts

9.80 Finally, we must emphasis 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 report 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 in the light of actual population and expenditure growth, and as development proceeds and its effects become measurable.

10 Potential Development Sites

10.1 As part of the brief, Dacorum Borough Council requested that a review of possible development sites within the three towns be undertaken. To assess each site a proforma was created; a copy of which can be found in Appendix 9, together with the results of the site surveys and maps identifying the location of each site.

Hemel Hempstead

1. Apsley Mills Retail Park

10.2 We inspected six possible retail development sites in Hemel Hempstead; three out-of-centre sites and three town centre sites. Site one on the location plan (Map 9.1, location 1) is at the Apsley Mills Retail Park, which is an out-of-centre site towards the southern end of the town, it extends to approximately six hectares (including Sainsburys) and is about two miles from the town centre. The site contains fully occupied retail warehouses including a Sainsburys superstore and bulky goods retail warehouses. The site is flat and is surrounded by busy roads, but the entrance is wide and easily accessible from London Road. The surrounding uses are predominantly residential. The site is constrained by the River Gade and the Grand Union Canal along the eastern and northern sides. From our assessment this site offers little opportunity for further retail development due to its physical constraints, the fact that it is well occupied and that the land surrounding is mainly used for residential purposes.

2. Jarman Park (Leisure World and Tesco)

10.3 The second site that was inspected is located out-of-centre at Jarman Park, approximately one mile from the centre of Hemel Hempstead (Map 9.1, location 2). The site is slightly sloping with one main access point. The entire site extends to approximately 12 hectares and currently has three main occupiers, Leisure World, McDonalds and Tesco. In commercial terms, the site would be suitable for intensification of retail use in the event that any of the exising leisure uses was to close. The site would also be suitable in commercial terms for extension of Tesco. However, there is no forecast need for any such additional retail floorspace on the site, in view of the allocation of the adjacent site in the adopted Local Plan for retail warehouse development, and the proposals to bring forward the Civic Zone site on the edge of the town centre (in terms of the sequential approach) for retail and other uses. We therefore consider that further retail development on the site would be inappropriate, at least until a need arises for more out-of-centre retail floorspace. This is unlikely to be until late in the LDF period to 2016.

3. Jarman Park (Vacant Site)

10.4 The third site is immediately adjacent to the second site at Jarman Park (Map 9.1 location 3). It is approximately 2 hectares, reasonably level, and currently vacant. There are therefore no obvious physical constraints to development of the site. It is identified for retail development in the adopted Local Plan, and is currently being marketed for retail warehouse development. By virtue of its location on a major road and adjacent to existing retail and leisure attractions, in commercial terms, the site would be suitable for additional retail warehousing. As a Local Plan commitment, it would be able to accommodate the forecast need for additional such bulky goods retail warehouses for much of the forecasting period.

4. Hemel Hempstead Market Site

10.5 Site four is the market site in the town centre and adjacent land to the north and south (Map 9.1, location 4). The Market site itself is approximately 230 m from the edge of the prime retail core. This site drops fairly steeply down from Marlowes but is reasonably flat after the drop. With regard to vehicular access, currently the site can be easily accessed via Waterhouse Street and Marlowes. The site comprises low-grade single-storey buildings being used by independent retailers and service businesses, service yards to the north and south of the market site, and the market site itself. The main bus station is located on the west edge of the market site. The market consists of permanent tubular steel stall structures, and is held four times per week. Adjacent land uses include some secondary retail, a church, café and some residential blocks. When the service yards north and south of the market are included, the total site area is approximately 1.5 hectares.

10.6 This site is included in the draft Supplementary Planning Document (Development Brief) dated November 2005 for the expanded Civic Zone site (as indicated in paragraph 10.12 below). This envisages that the site will be used for new Civic Offices, other civic and cultural uses, supporting retailing, and services such as cafes and restaurants. Much of the site may therefore not be available for major retail development. In any event, this site is some distance from the new prime retail attractions in the Riverside Centre, and separated from the prime pedestrianised area of Marlowes by Bridge Street. Riverside Centre will be likely to pull the 'centre of gravity' of the prime retail area to the south away from the Market site, and make it less attractive for prime retail development. However, we consider that the site could have potential for retail development formats which do not need to be in the highest rented prime locations, for example, large stores and/or specialist retailers; in conjunction with new Civic and cultural uses, cafes, restaurants, etc. Substantial retail development on the site may well necessitate closure of Bridge Street to all traffic (at least during main shopping hours), so as to optimise pedestrian linkages with the pedestrianised part of Marlowes to the south.

5. Asda at Hillfield Road

10.7 Site five was the current Asda site at Hillfield Road, approximately 230 m from the prime retail core, and set back from Marlowes (Map 9.1, location 5). The site area is approximately 0.6 hectares. Physically this is a very difficult site, which is steeply sloping down towards Marlowes. The site has difficult access from Hillfield Road, where although the road is quiet, the turns into the car park are sharp. The car park itself is small and on two levels . Uses surrounding the site include offices, residential, services and car parks, and the Iceland food store. The site is approximately a five minute walk from the prime retail core, and there is no direct retail connection with the other retail areas in the town centre. The most prominent physical constraint is the steepness of the slope into which the site is built. It is our conclusion that this site is not suitable for retail or leisure development due to the topography, difficult access, distance from the town centre retail areas and the nature of the surrounding uses. In the event that Asda relocates from the site, such as to the Civic Zone site, we consider that the best use of the site would probably be redevelopment for residential or office uses.

6. Existing Civic Zone Site

10.8 The last site to be inspected in Hemel Hempstead was the existing Civic Zone site north of Combe Street. This is an approximately level site, located at the north end of Marlowes on its west side (Map 9.1, location 6). The site area is approximately 5.8 hectares; and the nearest part of the site is adjacent to the edge of the current prime retail area (the pedestrianised part of Marlowes). The site is currently occupied by the Civic Centre and other public sector buildings, together with a small amount of other uses. The site is within the defined town centre. In terms of the sequential approach, the site lies mid-way between the main retail areas in Hemel Hempstead town centre, and the retailing and services in Old Town; and parts of the site are closer to the latter than the former.

10.9 In strict PPS6 locational terms, the site would be out-of-centre, as measured by its distance from the current prime retail area in the town centre. However, being within the town centre and on the principal access road from the north of the town, and being located near to the Old Town centre, any substantial new retail development on the site would be likely to function as edge-of-centre, and have the potential to comply with the sustainability objectives behind the sequential approach. It could easily be well served by the many buses which enter the town centre from the north along Marlowes.

10.10 Because of its size, shape and location, we consider that in commercial terms the site would be suitable for a large new food and non-food superstore. We are aware of interest in the site from at least two food superstore operators. As with the Market site, this site would probably also be attractive to some comparison goods retailers who operate large footprint 'big box' stores (similar in retail concept to retail warehouses, but designed and built to a higher standard appropriate to a town centre location), as and when need for such further floorspace arises. Such stores would be likely to attract comparison goods retailers who would not consider a location within the prime retail core of the town centre itself, because of the higher rentals and greater accessibility constraints there. However, by absorbing growth in retail expenditure, increasing the amount of comparison goods floorspace on the Civic Zone (and/or Market) site would put back the date by which further prime town centre retail development on the west side of Marlowes south of Bridge Street, post Riverside Centre, would become supportable.

10.11 In the event that new comparison goods stores (other than the comparison goods element of a food and non-food superstore) are not included in redevelopment of the Civic Zone site, new phases of town centre retail development at the south end of Marlowes could potentially be brought forward somewhat, probably to early in the period 2016 to 2021 (provided that out-of-centre retail development is restricted in accordance with the sequential approach).

10.12 As part of a mixed use redevelopment, the Civic Zone site would also be suitable for some A3 café and restaurant uses. Whilst the site could potentially also accommodate some other commercial leisure uses, the lack of demand for such development would be likely to preclude this, at least in the short to medium term. A draft Development Brief for the site, including also the Market site to the south, has recently been published by the Council for public consultation, as indicated above. Depending on the results of consultation, it is envisaged that subject to a masterplan, this expanded Civic Zone site will be allocated for redevelopment in the new Local Development Framework.

Other potential opportunities in Hemel Hempstead town centre

10.13 Although we have not precisely identified site locations and boundaries, we consider that there could be potential to develop additional prime retail floorspace at the south end of Marlowes, close to Riverside Centre. This could include redevelopment of the block of existing shops on the west side of Marlowes at the south end, possibly eventually extending northwards as far as Bridge Street. It could also potentially include closure of the south end of Waterhouse Street and part of Moor End Road, and development of the surface car park between Leighton Buzzard Road and Waterhouse Street.

10.14 These possible development opportunities could provide for future comparison goods shopping needs after about 2016. As longer term opportunities, they would need to be properly assessed in terms of retail capacity, local site planning and urban design, transport and accessibility, environmental impact, retail impact on the town centre and financial viability, at that time. They would also need to be subject to proper public consultation and inclusion in planning policy. However, we consider that the Council should consider identifying the west side of Marlowes, between Bridge Street and Riverside Centre, in general terms as a potential opportunity area for prime retail development towards the end of the LDF period, after Riverside Centre and retail development on the Civic Zone site have been completed and established settled trading patterns.

Berkhamsted

1. Stag Lane

10.15 We inspected two possible development sites within Berkhamsted (Map 9.2). Site one is at Stag Lane, a location approximately 685 m away from the Lower Kings Road and High Street junction in the town centre. The site extends to approximately 3 hectares and has a gentle slope down to the canal. Access to the site can be gained via Stag Lane. The northern half comprises industial wareouses that are fully occupied, situated close to the canal. The surrounding uses include residential units along Stag Lane and to the west of the site. Further residential development is being built along High street on the opposite side from the site.

10.16 In commercial terms, this site could well be attractive to any retailers which wish to operate large floorplan stores, as the site is large enough for such development and easily accessible from Gossoms End. However, the site is out-of-centre; and there is no forecast need for additional convenience goods floorspace, and only very limited need for additional comparison goods floorspace. In view of the existence of the Water Lane car park site (described below) in the core of the town centre, the Stag Lane site clearly fails the sequential approach. We therefore concluded that this site is not suitable in planning terms for retail development, mainly due to its distance from the retail centre, the surrounding non-retail uses, the absence of need, and the existence of a potential development site immediately adjacent to the prime retail area, which would be higher priority in terms of the sequential approach.

2. Water Lane Car Park

10.17 The second site inspected was the Water Lane car park site in the town centre. This extends to approximately one hectare and is a reasonably flat site with one main access point (Map 9.3). A second access point could potentially be constructed from Lower Kings Road. The surrounding uses include some offices, residential units, some service yards, a pumping station and a car park. The main physical constraint is the River Bulbourne at the northern end of the site.

10.18 It should be possible to extend the existing Tesco store into the car park at the rear of the building. There are some buildings which would need to be relocated including offices at Amersham House. Alternatively, it could be possible to redevelop the site with a scheme anchored by a new Tesco store and car park, with other shops linking through to High Street. PPS6 advises that higher density, mixed use schemes should be pursued in town centre and edge of centre locations. This site could have the potential for such a scheme, being in the core of the town centre. Residential and office accommodation could be incorporated, to take full advantage of the site’s location near the rail station. The advantage of redeveloping this site for a significant retail based mixed use scheme, would be that it would increase the depth of the retail area and reduce the need to elongate Berkhamsted High Street further. We therefore concluded that this site should be allocated for retail based mixed use development in the LDF, to be implemented as need arises.

Tring

1. Dolphin Square

10.19 We inspected two possible development sites in Tring (Map 9.4, location 1). The first was in Dolphin Square, which is in the town centre. This has two pedestrian access points. The entire site extends to approximately 0.6 hectares. The existing buildings within the site are of red brick construction. There is a car park to the rear of the property and some residential and retail units. This development would definitely benefit from refurbishment. A modest increase in floorspace could probably be accommodated. However the greatest constraint to extending this development is the proximity of the church and graveyard, which preclude expansion of the site. We consider that this area should be the first choice location to accommodate any new retail floorspace, in order to help finance refurbishment of the existing Dolphin Square centre. It would also accord with the first priorty of the sequential approach.

2. Cattle Market Site and Car Park

10.20 The second site inspected was the Cattle Market site and adjacent car park. This is approximately a 1.3 hectare site 250 metres from the core of the town centre (Map 9.4, location 2). It is a reasonably flat site, with good access through the car park, and a possible second access from Brook Street. The site contains a warehouse currently used for furniture auctions. The site is a five minute walk from Dolphin Square, and is surrounded by residential units and a car park. Part of the site (0.18 ha) is currently being resurfaced to provide a permanent site for the market, which is currently held in The Forge Car Park.

10.21 In commercial terms this site (including the part which is currently being resurfaced) would be suitable for a small foodstore such as a discount supermarket. It is close to the core of the town centre, is flat and is large enough for such a store with car parking. With regard to the sequential approach this site is within the designated town centre. Whilst it is not within the primary retail area (insofar as such an area can be said to exist in Tring, which has only a small amount of retailing), it is certainly edge-of-centre in PPS6 terms. Since there are no sites closer to the core of the town centre which could accommodate such a new food store, development of the site for this use would comply with the sequential approach. In commercial terms, we would expect the site to be attractive to any food retailer wishing to build a small to medium sized food store. However, the site is currently in use as an important surface car park, and as the site for the Tring market. It would be difficult to find alternative locations for these uses, both of which benefit the vitality and viability of the town centre. The need for a new discount supermarket, whilst demonstrable, is not so pressing that this site should be released for such development as a matter of urgency. In the event that it is released, any development on this site would need to respect the character of the conservation area and be in keeping with the historical setting of Tring. A retailer's 'standard format' discount food store would therefore probably not be appropriate. Higher quality of design, specific to the demands of the site and its setting, would be necessary.

Signed:

Jonathan Baldock

Name: **Jonathan Baldock** **Position:** Partner – Head of Retail Planning

Date: 12 January 2006

For and on behalf of Donaldsons LLP

APPENDICES

Appendix 1 – Car Park Proforma and Survey Results

Appendices

Appendix 2 – On Street Shopper Survey and Results

Appendix 3 – Business Survey Results

Appendix 4 – Environment Survey Proforma and Survey Results

Appendices

Appendix 5 – Location of Blocks for Analysis within each Town

Appendix 6 – Leisure Facility Location Maps

Appendix 7 – Household Survey Questionnaire and Results

Appendix 8 – RECAP Model

Appendix 9 – Development Site Proforma and Location Maps

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